



FSGA

Understanding the National Fantasy/Sport Betting Market

WITH DEEP DIVES INTO NEW JERSEY
AND BRAND USAGE

JUNE 2019

© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

About Us



Jason Allsopp
Vice President
Ipsos, Gaming &
Lottery Practice



Brandon Cain
Research Analyst
Ipsos, Gaming &
Lottery Practice



Adam Wexler
CEO, Performance
Predictions

Co-Chair of Research
& Awards
Committee, FSGA
Board of Directors



Ferdinando Di Fino
Fantasy Content, The
Athletic

Co-Chair of Research
& Awards
Committee, FSGA
Board of Directors



Tracey Hankin
CEO, Inside Injuries

Co-Chair of
Research & Awards
Committee, FSGA
Board of Directors

Table of Contents

04

BACKGROUND AND METHODOLOGY

11

PARTICIPATION IN FANTASY SPORTS AND SPORTS BETTING

27

NEW JERSEY ONE YEAR LATER

37

BRAND CONSUMPTION

45

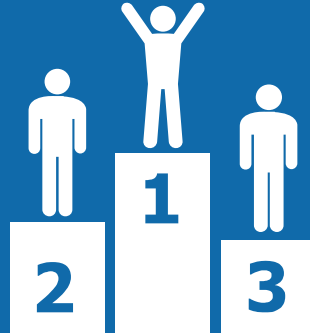
DEMOGRAPHICS

50

APPENDIX

BACKGROUND AND METHODOLOGY

Background & Objectives



With the Sports Betting landscape beginning to shift rapidly in the U.S, the FSGA partnered with Ipsos to discover three topics: Understanding the Incidence of U.S. Fantasy Sports and Sports Betting Participation, New Jersey, One Year Later, and How Valuable are Fantasy Players and Sports Bettors to Brands

More specifically, the research objectives were:

1

Determine the number of adult fantasy sports players, sports bettors and the overlap between the two activities, key demographic breakdowns, participation in various leagues, and shifts over time.

2

How has fantasy sports been affected by the legalization of sports betting in New Jersey, changes within the sports betting market in New Jersey, where/how are players betting on sports in New Jersey and observing Off shore/bookie bettors in New Jersey.

3

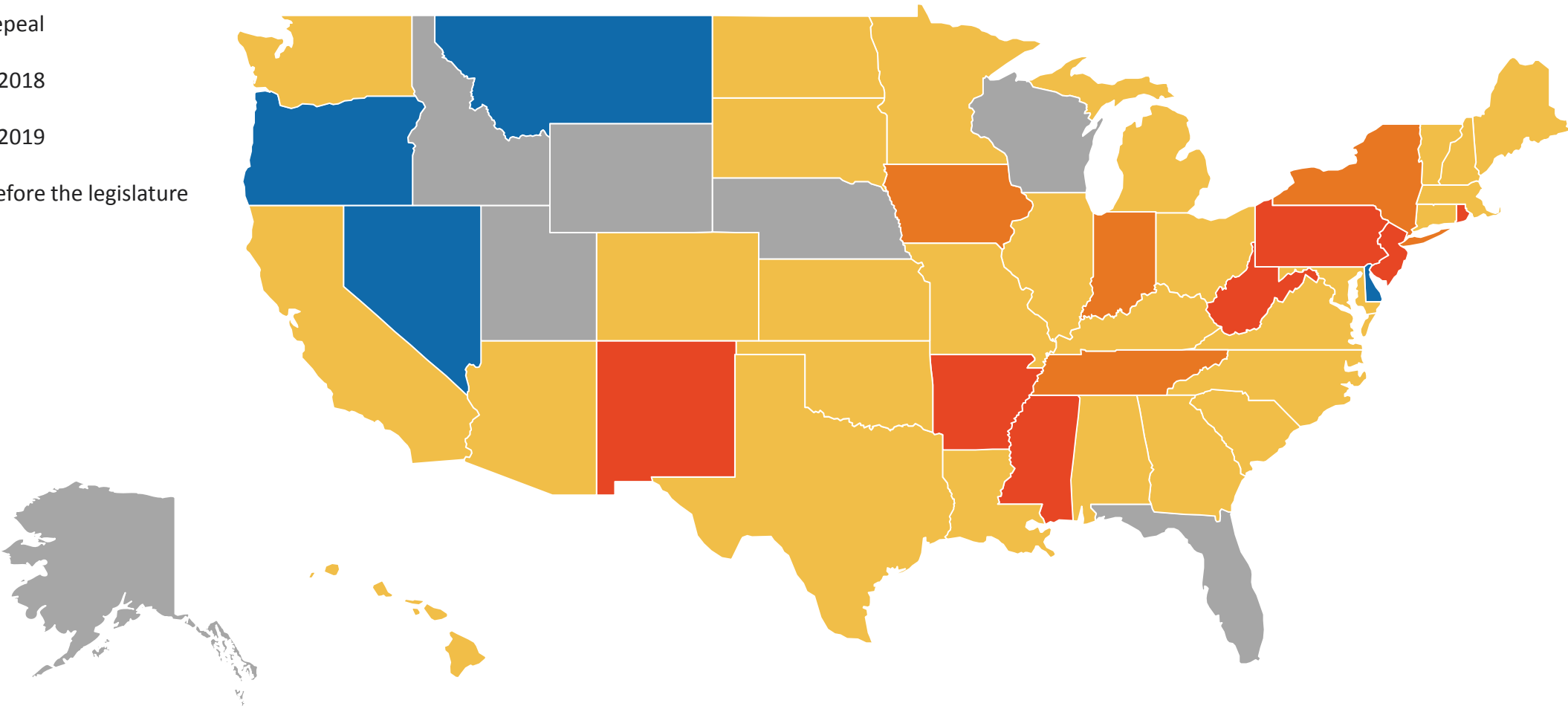
Which brands/goods do fantasy players and/or sports bettors over-consume compared to the general population and potential brand partnerships for the FSGA.

Methodology

	WHERE	United States
	TARGET	1) General Population 2) National Sports Bettors or Fantasy Players 3) New Jersey Sports Bettors or Fantasy Players
	SAMPLE SIZE	1) n=1000 2) n=1966 3) n=712
	ONLINE SURVEY	10 minutes
	FIELD DATES	May 15-27, 2019

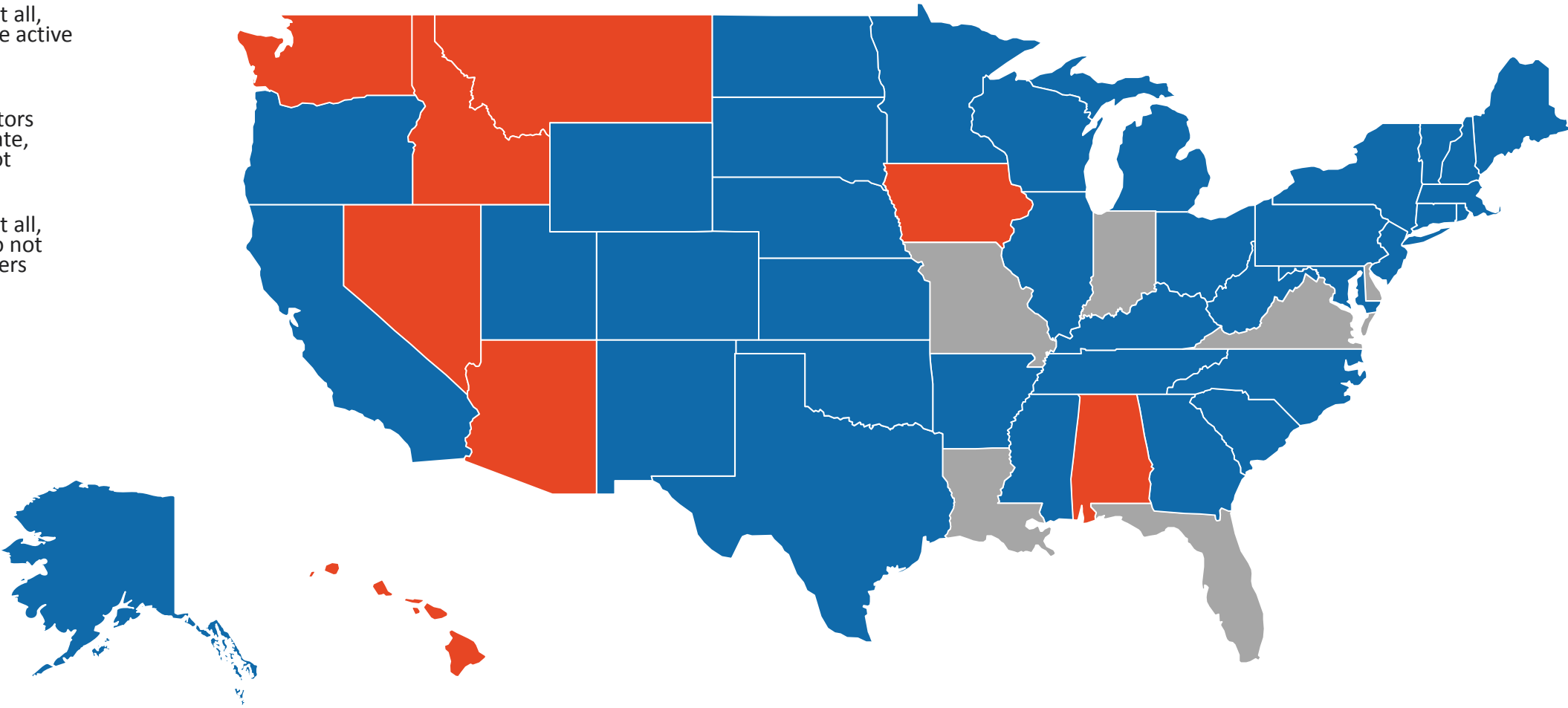
Level of Sports Betting Legalization

- Pre PASPA repeal
- Legalized in 2018
- Legalized in 2019
- Have vote before the legislature



Level of DFS Legalization

- All, or almost all, operators are active in the state
- Some operators serve the state, others do not
- All, or almost all, operators do not take customers in the state

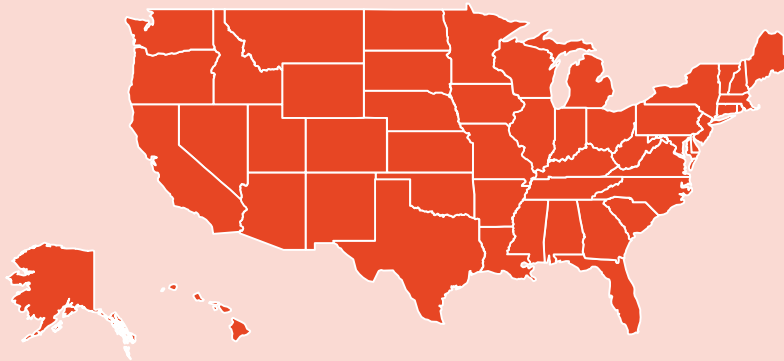


Who We Spoke To

GEN POP SAMPLE



NATIONAL FANTASY SPORTS PLAYERS OR SPORTS BETTORS



NEW JERSEY FS PLAYERS OR SPORTS BETTORS



Sample Groups



Gen Pop

General population of the US



Sports Bettors

Participated in sports betting in the past 12 months



Fantasy Players

Played a fantasy sport in the past 12 months



Daily Fantasy Players

Fantasy player that plays daily fantasy sports



Traditional Fantasy Players

Fantasy player that plays traditional fantasy sports



NJ Fantasy Players

New Jersey fantasy players



NJ Sports Bettors

New Jersey sports bettors



New NJ Sports Bettors

New Jersey sports bettors who started in the past year



NJ Bookie Bettors

New Jersey sports bettors who use a bookie



Offshore/Online NJ Bettors

New Jersey sports bettors who play online



PARTICIPATION: FANTASY SPORTS AND SPORTS BETTING

Key Findings



1

Currently about 1-in-5 Americans participates in sports betting (19%) and about 1-in-5 Americans participates in fantasy sports (19%). Given that sports betting is just now becoming legal in a few states, there could be potential for more growth from this activity. Both fantasy players and sports bettors tend to skew male and younger than the general population. Fantasy players and sports bettors also tend to have higher incomes and are more educated. These players also tend to be single when compared to the general population. Companies can use these demographics to better target potential players/bettors, which will be crucial as more states legalize sports betting.

2

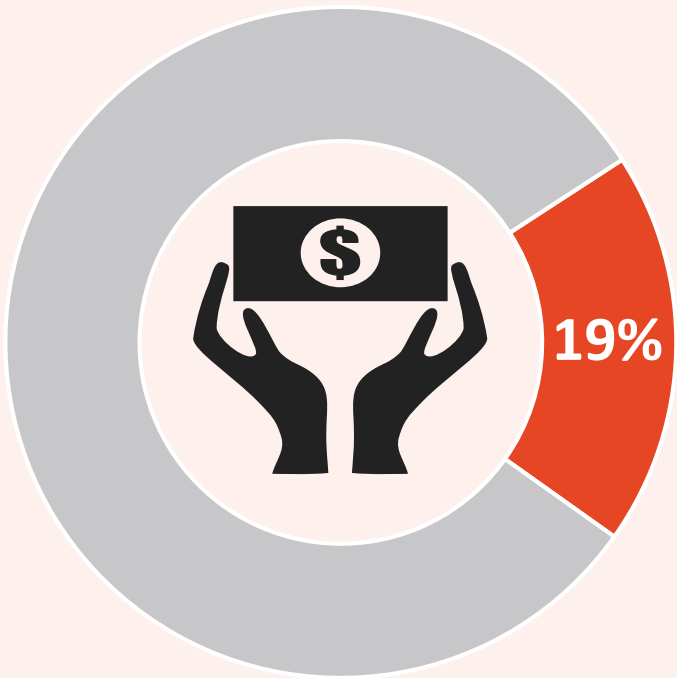
The National Football League is king when it comes to betting and fantasy participation. Without a doubt, this is the most popular league to bet on and the most popular fantasy sport. Major League baseball and the National Basketball Association round out the top 3. When splitting out fantasy participation into DFS and traditional fantasy, about half of all fantasy players only play traditional (51%), 17% only play DFS and 32% play both DFS and traditional. The cross over between DFS and traditional has grown since 2017 (23% played both in 2017). One potential factor of this growth could be increased awareness from the general public. DFS far outpaces traditional in sports/leagues participated in. The average DFS player is going to participate in 3.5 sports while traditional players only participate in 2.5 sports. One reason for this difference is that there is less commitment in DFS compared to traditional fantasy players. DFS hosting sites can use this to encourage cross play on their site.

3

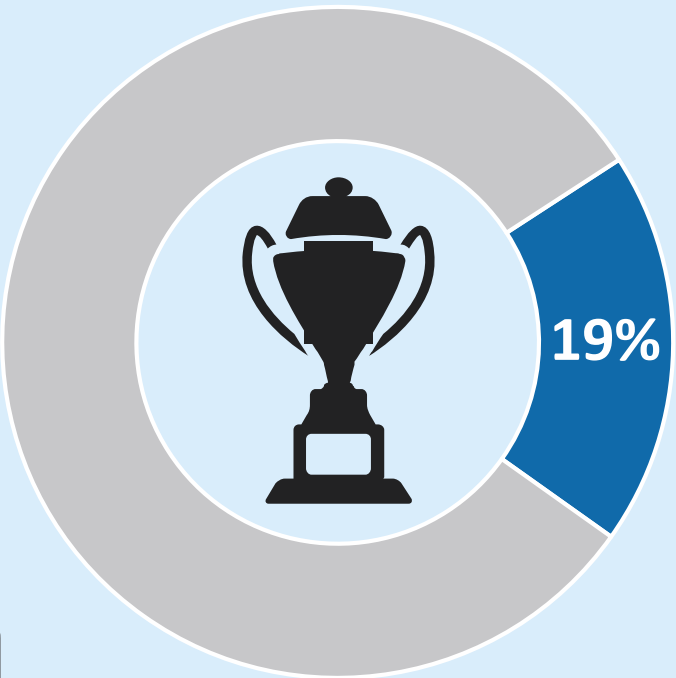
When it comes to changes in participation, most fantasy players and sports bettors are either playing/betting more or no change in participation (84% for sports bettors and 87% for fantasy players). This shouldn't be surprising as fantasy sports and sports betting are becoming more mainstream which can help and maintain growth in the industries. As existing players/bettors consume more, complimentary industries can benefit as well. Another positive is that both activities are very similar in growth which should quell the fear of one activity potentially cannibalizing the other.

Participation within the General Population

Bet on Sports
(n=1,000)



Play Fantasy Sports
(n=1,000)



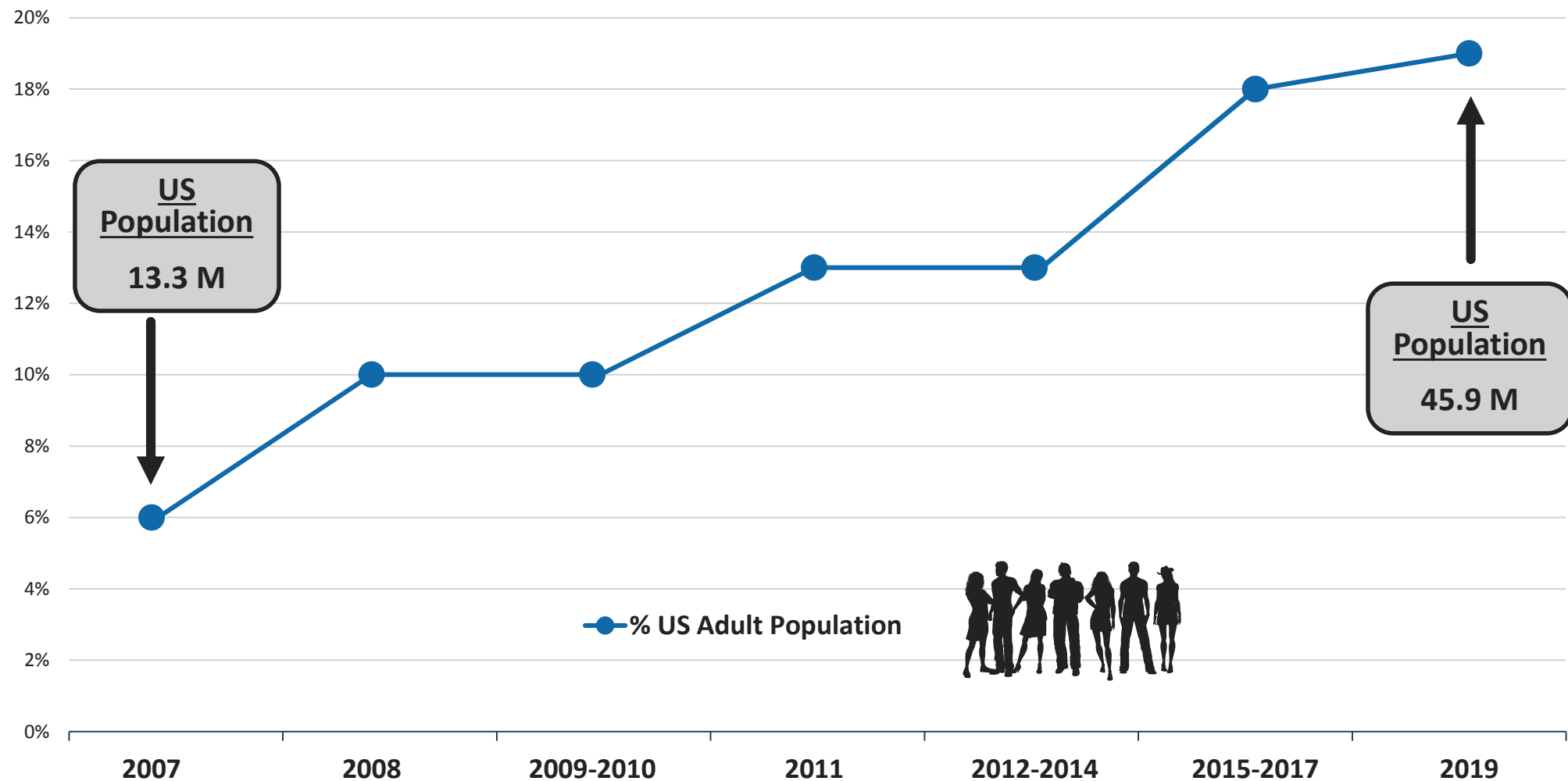
Either a Sports Bettor or Fantasy Player

24%

Base: All respondents

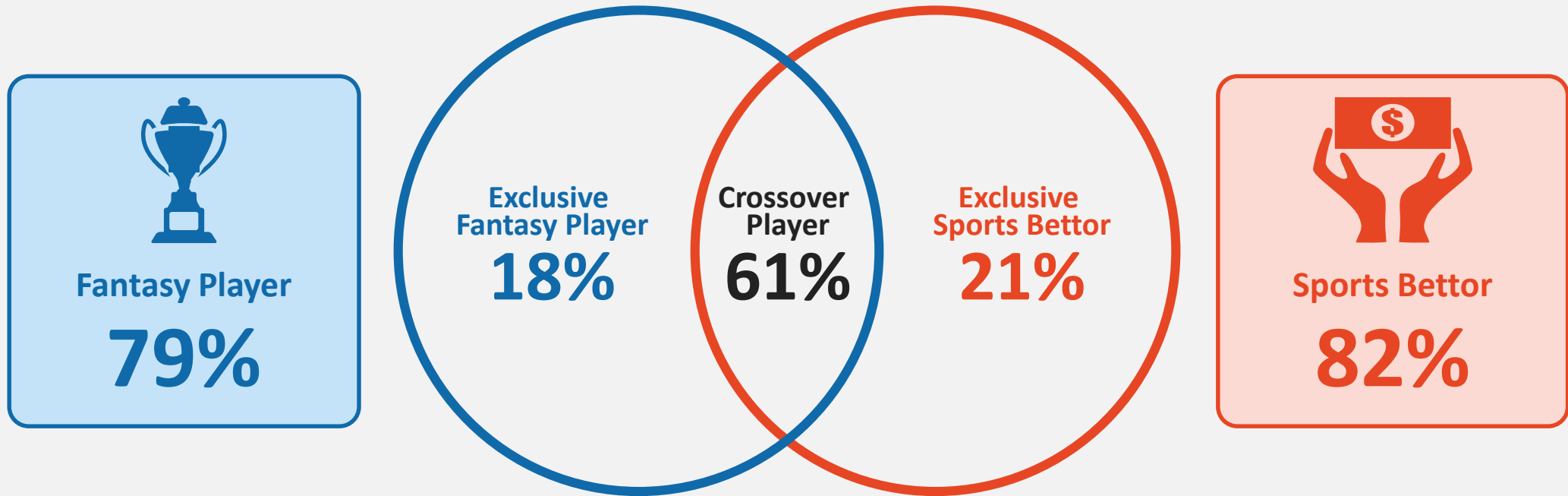
A1. Please select the responses below that best describe your participation level in Fantasy Sports since April of 2018 (within the past 12 months).
A2. Which of the following sports/sports leagues, if any, have you bet on since April of 2018 (within the past 12 months).

Change in Fantasy Sports Participation in the USA Since 2007

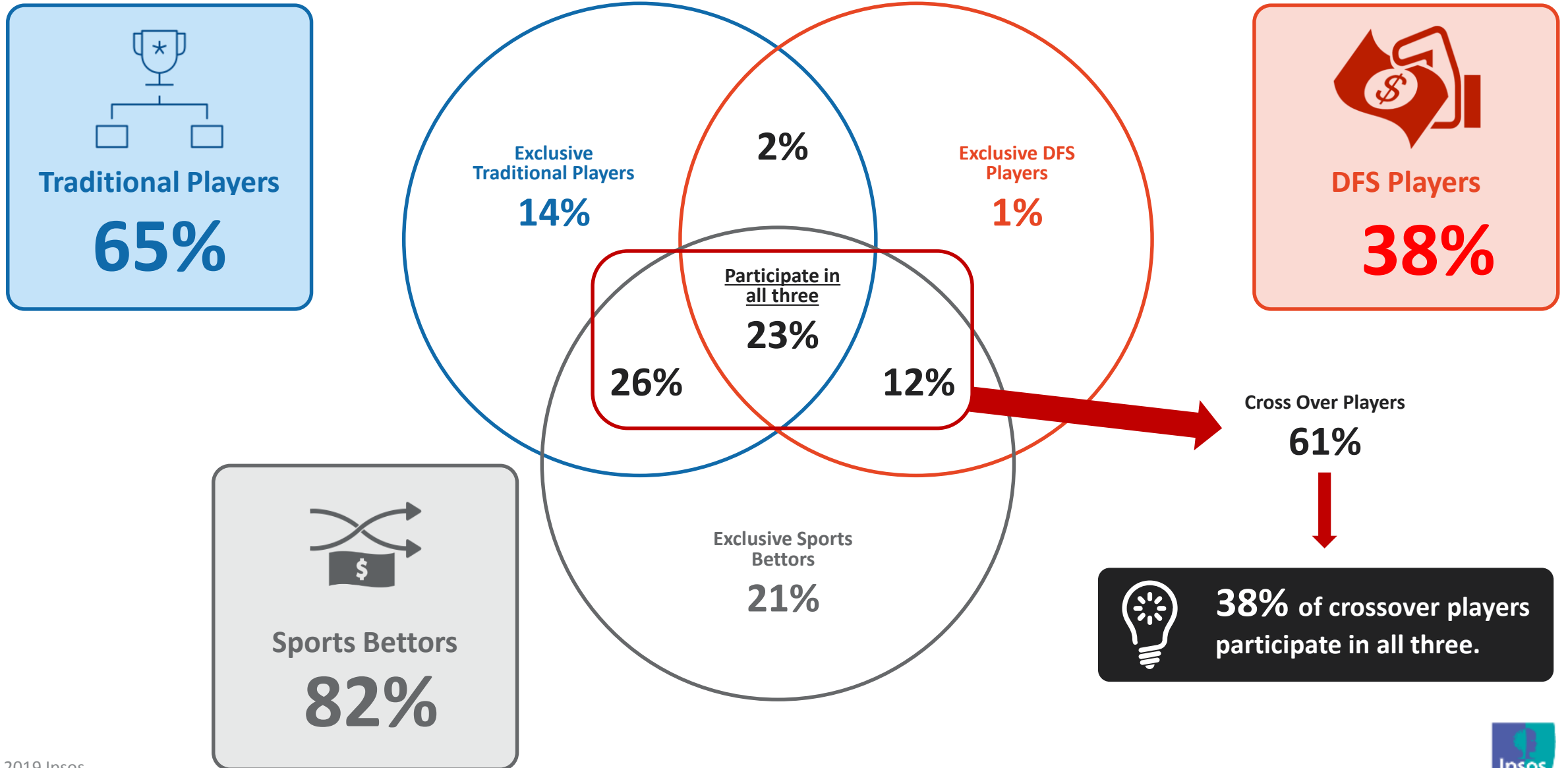


Overlap between Fantasy Sports and Sports Betting

2019

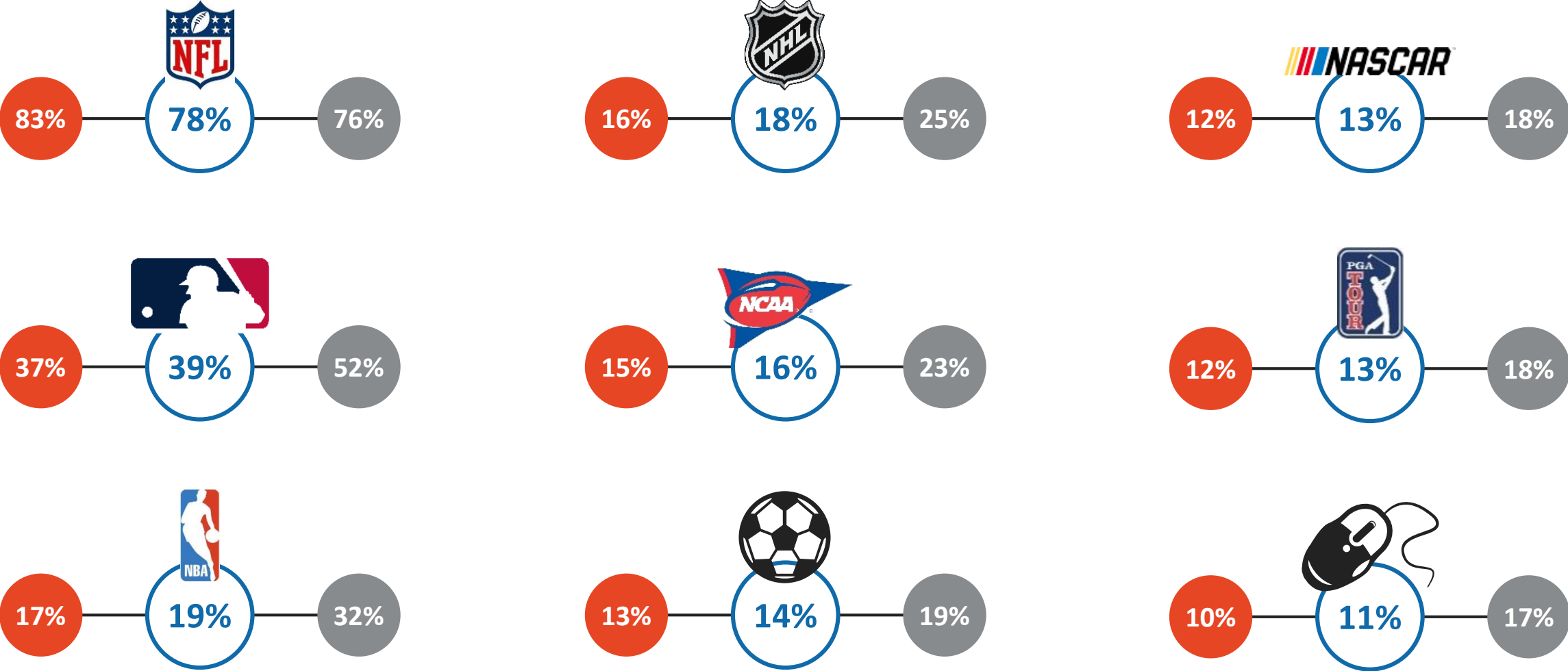


Crossover At A Product Level



Fantasy Sports Participation

% PAST YEAR PARTICIPATION



Base: All respondents
A1. Please select the responses below that best describe your participation level in Fantasy Sports since April of 2018 (within the past 12 months).

Fantasy Sports Participation

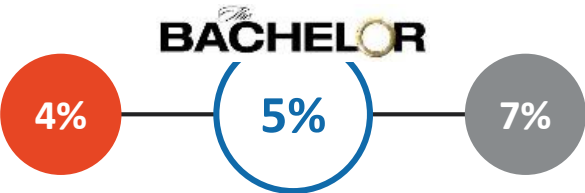
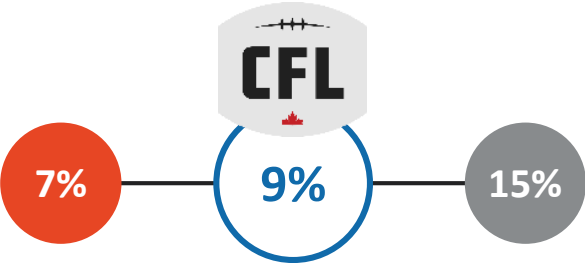
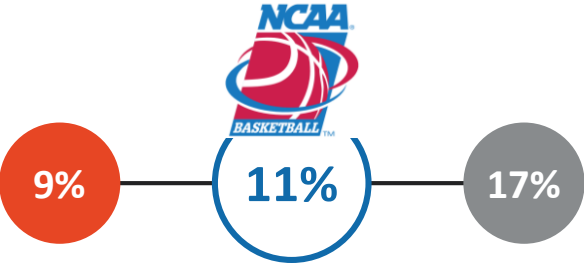
Traditional
fantasy players
(n=1,296)

All fantasy players
(n=1,556)

DFS players
(n=755)



% PAST YEAR PARTICIPATION



Average Number of Fantasy Sports Participated In

2.6
2.5
3.5

Base: All respondents

Fantasy Sports Cross Play

0% to 20% 21% to 40% 41% to 60% 61% to 80% 81% to 100%

Those who play...

	Any Activity (Net) (n=1,556)	Fantasy Football (NFL) (n=1,214)	Fantasy Baseball (MLB) (n=610)	Fantasy Basketball (NBA) (n=303)	Fantasy Hockey (NHL) (n=282)	Fantasy College Football (NCAA Football) (n=248)	Fantasy Soccer (n=221)	Fantasy Racing (NASCAR) (n=206)	Fantasy Golf (n=202)	Fantasy eSports (n=169)	Fantasy College Basketball (NCAA Basketball) (n=168)	Fantasy MMA (UFC) (n=150)	Fantasy Arena Football (AFL) (n=142)	Fantasy Football (CFL) (n=139)	Fantasy Bachelor (n=71)*
Fantasy Football (NFL)	78%		77%	82%	82%	84%	64%	78%	73%	68%	76%	78%	80%	71%	66%
Fantasy Baseball (MLB)	39%	39%		70%	70%	64%	62%	63%	67%	53%	68%	65%	69%	72%	67%
Fantasy Basketball (NBA)	19%	20%	35%		38%	37%	39%	35%	46%	34%	52%	38%	46%	37%	43%
Fantasy Hockey (NHL)	18%	19%	32%	36%		43%	37%	44%	42%	32%	45%	59%	53%	55%	49%
Fantasy College Football (NCAA Football)	16%	17%	26%	30%	38%		32%	38%	35%	38%	65%	44%	50%	57%	50%
Fantasy Soccer	14%	12%	22%	29%	29%	28%		31%	37%	42%	32%	51%	34%	45%	61%
Fantasy Racing (NASCAR)	13%	13%	21%	24%	32%	31%	29%		30%	35%	38%	46%	35%	48%	44%
Fantasy Golf	13%	12%	22%	30%	30%	29%	34%	29%		26%	41%	43%	40%	42%	55%
Fantasy eSports	11%	9%	15%	19%	19%	26%	32%	28%	22%		26%	36%	35%	32%	39%
Fantasy College Basketball (NCAA Basketball)	11%	11%	19%	29%	27%	44%	24%	31%	34%	26%		37%	41%	39%	44%
Fantasy MMA (UFC)	10%	10%	16%	19%	31%	26%	35%	33%	32%	32%	33%		41%	46%	51%
Fantasy Arena Football (AFL)	9%	9%	16%	22%	27%	28%	22%	24%	28%	29%	35%	39%		43%	54%
Fantasy Football (CFL)	9%	8%	16%	17%	27%	32%	28%	32%	29%	26%	32%	42%	42%		56%
Fantasy Bachelor	5%	4%	8%	10%	12%	14%	19%	15%	19%	16%	19%	24%	27%	29%	
Average # of Fantasy Sports	2.6	2.8	4.3	5.2	5.6	5.9	5.6	5.8	5.9	5.6	6.6	7.0	6.9	7.1	7.8

* Small base size, interpret with caution.

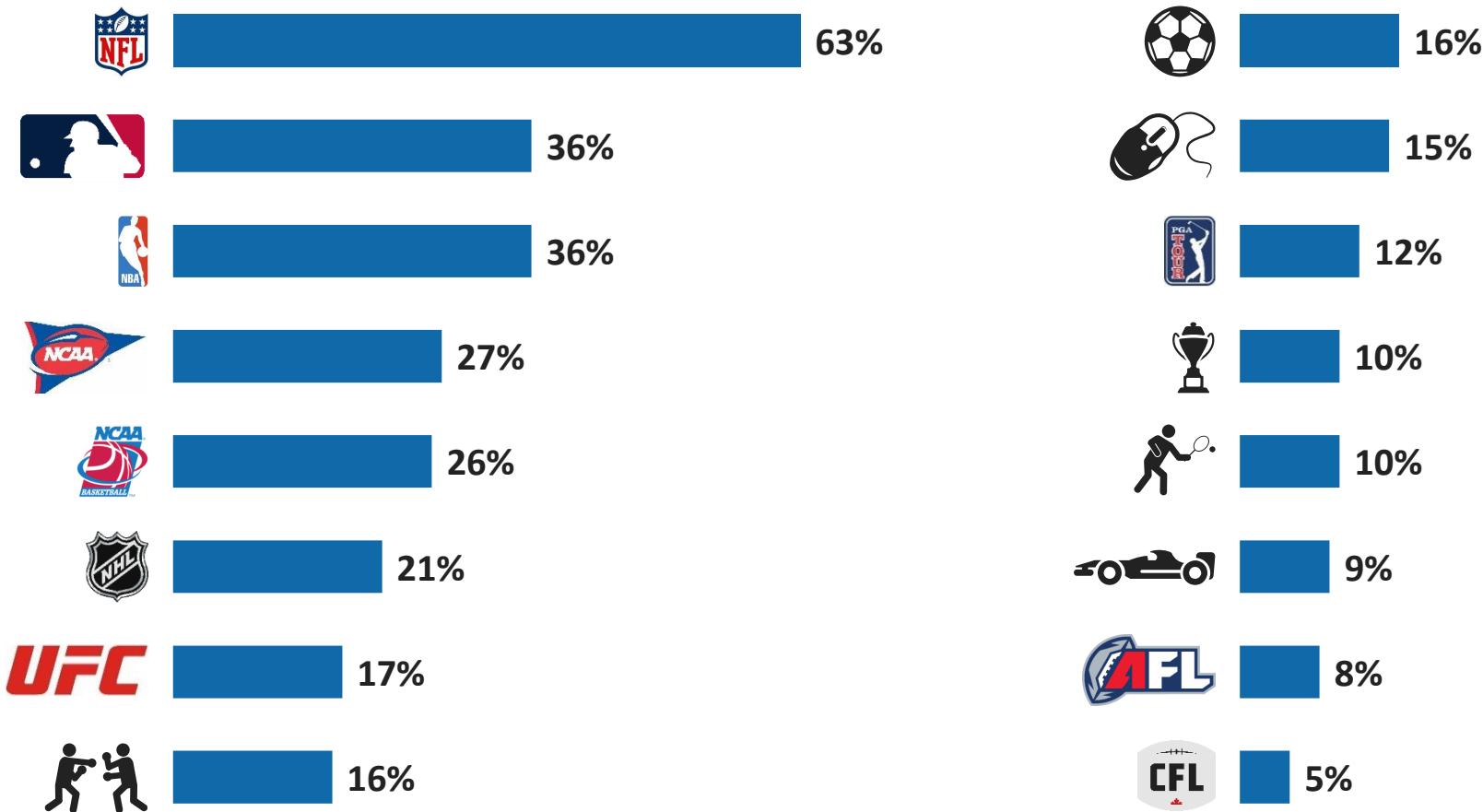
Base: All National Fantasy Players



The columns represent all who participated in a particular activity, while the rows are their corresponding participation in other activities. Using the NFL column as an example, 39% of Fantasy Football players also play Fantasy Baseball, whereas 77% of Fantasy Baseball players also play Fantasy Football.

Sports Betting Participation

% Have Bet On In Past Year
Sports Bettors (n=1,618)



Average Number of
Sports bet on

3.3

Base: All National Sports Bettors

Sports Betting Cross Play

0% to 20% 21% to 40% 41% to 60% 61% to 80% 81% to 100%

Those who bet on...																	
	Any Activity (Net) (n=1,618)	National Football League (NFL) (n=1,014)	Major League Baseball (MLB) (n=587)	National Basketball Association (NBA) (n=577)	NCAA Football (n=435)	NCAA Basketball (n=417)	National Hockey League (NHL) (n=337)	Ultimate Fighter Championship (UFC) (n=271)	Boxing (n=264)	Professional Soccer leagues (n=261)	eSports (n=246)	PGA Golf (n=187)	Soccer Tournaments/Cups or International "Friendlies" (n=161)	Tennis (n=161)	Motor racing (n=144)	Arena Football League (AFL) (n=126)	Canadian Football League (CFL) (n=81)*
National Football League (NFL)	63%		69%	68%	77%	71%	79%	68%	63%	64%	56%	68%	62%	55%	61%	64%	65%
Major League Baseball (MLB)	36%	40%		58%	48%	53%	64%	55%	51%	60%	52%	67%	69%	64%	53%	55%	64%
National Basketball Association (NBA)	36%	39%	57%		47%	54%	58%	59%	52%	63%	55%	60%	67%	55%	51%	63%	63%
NCAA Football	27%	33%	36%	35%		57%	41%	34%	31%	34%	36%	51%	47%	41%	44%	60%	53%
NCAA Basketball	26%	29%	38%	39%	55%		44%	37%	39%	37%	36%	52%	47%	46%	40%	50%	53%
National Hockey League (NHL)	21%	26%	37%	34%	32%	36%		41%	42%	45%	38%	46%	53%	37%	38%	44%	59%
Ultimate Fighter Championship (UFC)	17%	18%	25%	28%	21%	24%	33%		47%	31%	45%	32%	43%	34%	35%	46%	48%
Boxing	16%	16%	23%	24%	19%	24%	33%	45%		28%	30%	33%	37%	48%	38%	34%	47%
Professional Soccer leagues	16%	16%	27%	29%	20%	23%	35%	30%	28%		43%	30%	64%	38%	38%	36%	55%
eSports	15%	14%	22%	23%	20%	21%	28%	41%	28%	40%		33%	48%	42%	39%	48%	56%
PGA Golf	12%	12%	21%	19%	22%	23%	25%	22%	23%	21%	25%		28%	41%	28%	31%	30%
Soccer Tournaments/Cups or International "Friendlies"	10%	10%	19%	19%	18%	18%	25%	25%	22%	39%	31%	24%		36%	24%	29%	49%
Tennis	10%	9%	18%	15%	15%	18%	18%	20%	29%	24%	28%	36%	36%		32%	29%	36%
Motor racing	9%	9%	13%	13%	14%	14%	16%	19%	20%	21%	23%	22%	21%	29%		35%	35%
Arena Football League (AFL)	8%	8%	12%	14%	18%	15%	17%	22%	16%	18%	25%	21%	23%	23%	30%		41%
Canadian Football League (CFL)	5%	5%	9%	9%	10%	10%	14%	14%	15%	17%	18%	13%	25%	18%	20%	27%	
Average # of Sports bet on	3.3	3.8	5.3	5.3	5.4	5.6	6.3	6.3	6.1	6.4	6.4	6.9	7.7	7.1	6.7	7.5	8.5

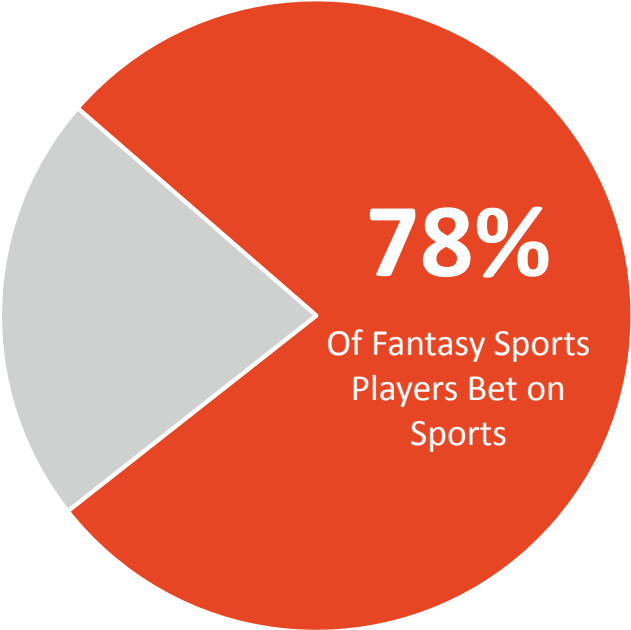
* Small base size, interpret with caution.

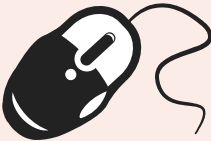
Base: All National Sports Bettors



The columns represent all who participated in a particular activity, while the rows are their corresponding participation in other activities. Using the NFL column as an example, 40% of NFL bettors bet on the MLB, whereas 69% of MLB bettors bet on the NFL.

Fantasy Sports Players' Sports Betting Participation



% PAST YEAR SPORTS BETTING					
					
49%	32%	32%	22%	21%	19%
					Soccer Tournaments/ Cups or International Friendlies
16%	16%	15%	15%	10%	10%
					
9%	8%	8%	5%		

Fantasy Sports & Sports Betting Cross Play

0% to 20% 21% to 40% 41% to 60% 61% to 80% 81% to 100%

Those who play...

Also bet on...

	Any Activity (Net) (n=1,208)	Fantasy Football (NFL) (n=945)	Fantasy Baseball (MLB) (n=535)	Fantasy Basketball (NBA) (n=269)	Fantasy Hockey (NHL) (n=259)	Fantasy College Football (NCAA Football) (n=233)	Fantasy Soccer (n=210)	Fantasy Racing (NASCAR) (n=182)	Fantasy Golf (n=180)	Fantasy College Basketball (NCAA Basketball) (n=166)	Fantasy eSports (n=156)	Fantasy MMA (UFC) (n=147)	Fantasy Arena Football (AFL) (n=136)	Fantasy Football (CFL) (n=136)	Fantasy Bachelor (n=68)*
National Football League (NFL)	64%	75%	68%	70%	74%	73%	52%	70%	63%	71%	66%	68%	65%	68%	53%
National Basketball Association (NBA)	41%	44%	60%	79%	60%	63%	59%	62%	60%	63%	62%	65%	60%	63%	58%
Major League Baseball (MLB)	41%	43%	71%	63%	67%	56%	55%	63%	65%	58%	56%	71%	63%	64%	65%
NCAA Football	28%	30%	35%	38%	42%	66%	23%	45%	41%	58%	35%	45%	50%	55%	46%
NCAA Basketball	26%	28%	39%	42%	45%	56%	29%	34%	51%	65%	28%	43%	54%	47%	41%
National Hockey League (NHL)	24%	26%	35%	40%	62%	41%	40%	42%	45%	51%	32%	53%	53%	53%	52%
Professional Soccer leagues	21%	20%	32%	38%	34%	36%	61%	43%	34%	42%	44%	44%	41%	52%	54%
Ultimate Fighter Championship (UFC)	20%	21%	27%	30%	37%	34%	40%	49%	36%	42%	45%	65%	42%	50%	55%
Boxing	19%	21%	26%	27%	34%	32%	35%	26%	37%	35%	34%	53%	39%	34%	39%
eSports	19%	18%	25%	24%	31%	29%	40%	46%	33%	34%	61%	50%	46%	47%	60%
PGA Golf	13%	13%	19%	24%	22%	26%	22%	27%	48%	35%	26%	35%	31%	29%	32%
Soccer Tournaments/Cups or International "Friendlies"	13%	14%	21%	26%	32%	28%	40%	36%	27%	34%	30%	44%	29%	44%	43%
Tennis	12%	11%	17%	20%	26%	25%	27%	26%	32%	26%	22%	34%	30%	38%	33%
Arena Football League (AFL)	10%	10%	14%	14%	20%	30%	18%	27%	26%	32%	22%	30%	40%	37%	47%
Motor racing	10%	11%	14%	16%	18%	20%	19%	33%	24%	21%	25%	24%	39%	25%	35%
Canadian Football League (CFL)	7%	6%	10%	8%	14%	14%	18%	18%	18%	14%	16%	22%	18%	28%	25%
Average	3.7	3.9	5.1	5.6	6.2	6.3	5.8	6.5	6.4	6.8	6.0	7.4	7.0	7.3	7.4

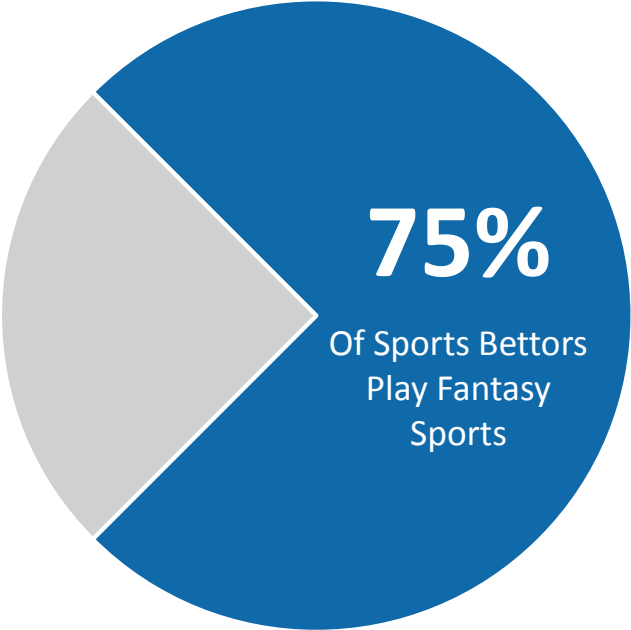
* Small base size, interpret with caution.

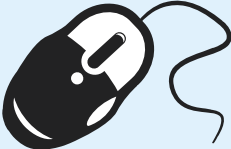
Base: Fantasy Players and Sports Bettors



The columns represent all who participated in a particular activity, while the rows are their corresponding participation in other activities. Using the NFL column as an example, 75% of fantasy football players bet on the NFL, 44% of fantasy football players bet on the NBA.

Sports Bettors' Fantasy Sports Participation



% PAST YEAR FANTASY PARTICIPATION				
				
58%	33%	17%	16%	14%
				
13%	11%	11%	10%	10%
				
9%	8%	8%	4%	

Base: Sports Bettors (n=1,618)

Sports Betting & Fantasy Sports Cross Play

0% to 20% 21% to 40% 41% to 60% 61% to 80% 81% to 100%

Also play...	Those who bet on...																	
		Any Activity (Net) (n=1,208)	National Football League (NFL) (n=769)	National Basketball Association (NBA) (n=497)	Major League Baseball (MLB) (n=495)	NCAA Football (n=340)	NCAA Basketball (n=319)	National Hockey League (NHL) (n=289)	Professional Soccer leagues (n=249)	Ultimate Fighter Championship (UFC) (n=242)	Boxing (n=228)	eSports (n=227)	PGA Golf (n=157)	Soccer Tournaments/ Cups or International "Friendlies" (n=156)	Tennis (n=146)	Motor racing (n=123)	Arena Football League (AFL) (n=118)	Canadian Football League (CFL) (n=81)*
	Fantasy Football (NFL)	78%	93%	83%	82%	84%	84%	84%	77%	82%	86%	75%	77%	82%	74%	84%	80%	66%
	Fantasy Baseball (MLB)	44%	47%	65%	76%	56%	65%	66%	68%	61%	60%	59%	64%	71%	62%	60%	64%	62%
	Fantasy Basketball (NBA)	22%	24%	43%	34%	30%	36%	37%	41%	33%	32%	29%	41%	44%	37%	35%	31%	26%
	Fantasy Hockey (NHL)	21%	25%	31%	35%	32%	36%	56%	35%	40%	38%	35%	36%	53%	46%	39%	44%	43%
	Fantasy College Football (NCAA Football)	19%	22%	29%	26%	45%	41%	33%	34%	33%	33%	30%	39%	43%	40%	38%	59%	39%
	Fantasy Soccer	17%	14%	25%	23%	14%	19%	29%	51%	35%	32%	37%	30%	54%	39%	33%	32%	45%
	Fantasy Racing (NASCAR)	15%	16%	23%	23%	24%	19%	26%	31%	37%	21%	37%	32%	42%	33%	49%	42%	41%
	Fantasy Golf	15%	15%	22%	24%	22%	29%	28%	25%	27%	29%	26%	55%	31%	40%	35%	39%	41%
	Fantasy College Basketball (NCAA Basketball)	14%	15%	21%	19%	28%	34%	29%	28%	29%	25%	25%	37%	36%	29%	29%	45%	29%
	Fantasy eSports	13%	13%	19%	18%	16%	14%	18%	28%	29%	24%	42%	25%	31%	23%	32%	29%	30%
	Fantasy MMA (UFC)	12%	13%	19%	21%	19%	20%	27%	26%	40%	34%	33%	33%	41%	34%	29%	37%	39%
	Fantasy Arena Football (AFL)	11%	12%	16%	17%	20%	23%	25%	22%	23%	23%	28%	27%	26%	28%	43%	46%	31%
	Fantasy Football (CFL)	11%	12%	17%	18%	22%	20%	25%	28%	28%	20%	28%	25%	39%	35%	28%	42%	47%
	Fantasy Bachelor	6%	5%	8%	9%	9%	9%	12%	15%	15%	12%	18%	14%	19%	15%	19%	27%	21%
	Average	3.0	3.3	4.2	4.3	4.2	4.5	5.0	5.1	5.1	4.7	5.0	5.4	6.1	5.4	5.5	6.2	5.6

* Small base size, interpret with caution.
Base: Fantasy Players and Sports Bettors



The columns represent all who participated in a particular activity, while the rows are their corresponding participation in other activities. Using the NFL column as an example, 93% of NFL bettors played Fantasy Football, 47% of NFL bettors played Fantasy Baseball.

Change in Amount of Sports Betting/Fantasy Participation

FANTASY PLAYERS (N=1,556)



40%

Played fantasy sports more than last year



47%

Played fantasy sports the same amount as last year



14%

Played fantasy sports less than last year

SPORTS BETTORS (N=1,618)



41%

Bet more on sports than last year



43%

Bet on sports the same amount as last year



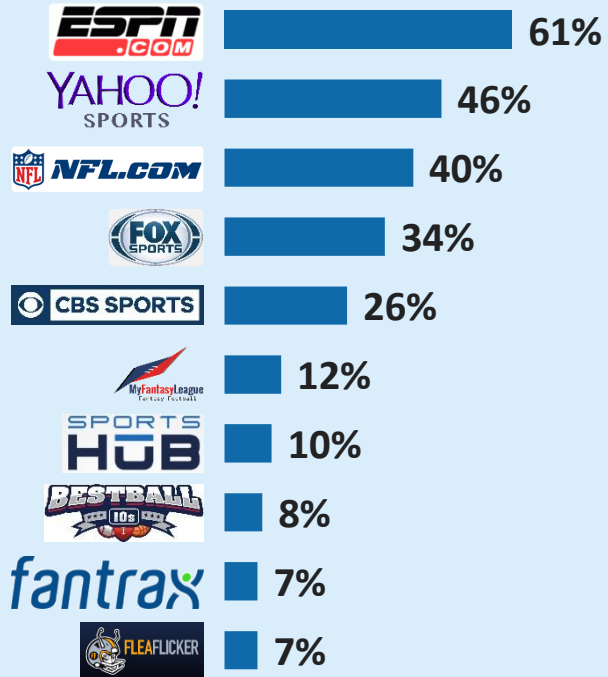
16%

Bet less on sports than last year

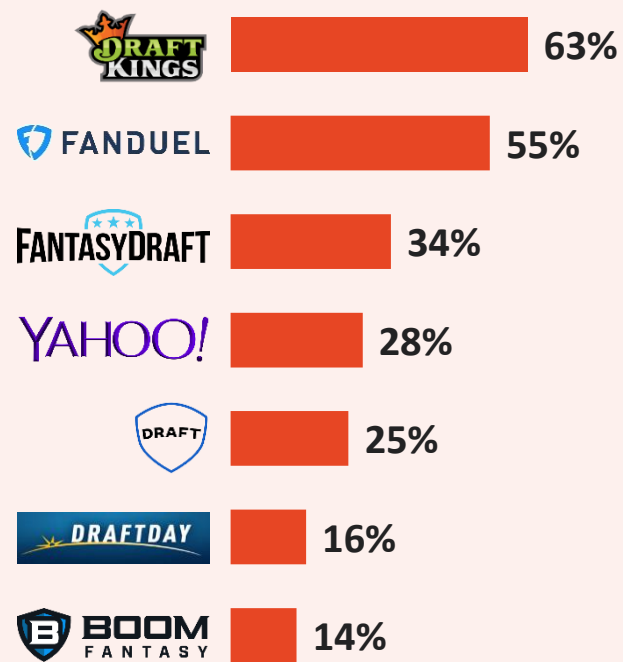
Base: National Fantasy Player OR Sports Bettor

Top Websites Used Per Activity

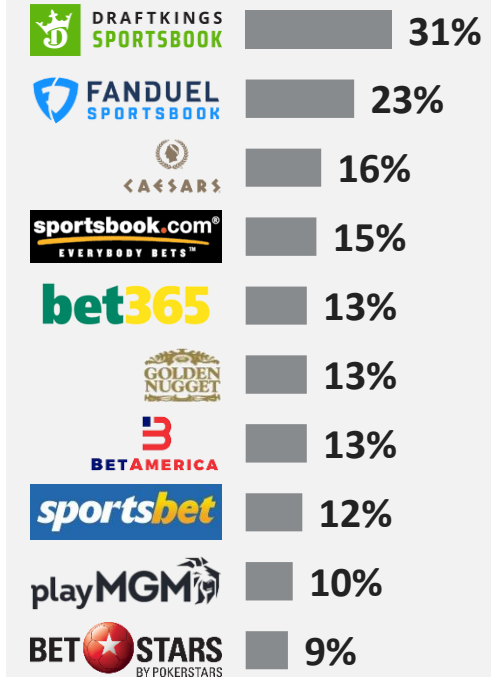
Traditional Fantasy Players (n=1,296)



DFS Players (n=755)



Sports Bettors (n=1,076)



Note: Only top 10 websites (if applicable) shown for each category.

Base: National Traditional Fantasy Players

B2A. Thinking only of traditional leagues, what websites are used to host your league(s)? I.e. the website(s) that hosts the information for all the teams in your league as well as the schedule, statistics, scores, and standings for the league.

Base: National DFS Players

B2B. Now, thinking only of daily fantasy sports leagues/contests, what websites do you use for your DFS contests?

Base: National Sports Bettors

B7. In the past 12 months, which of the following have you used to place your sports bets?

NEW JERSEY ONE YEAR LATER

Key Findings



1

Compared to the national average, New Jersey has a higher crossover between sports betting and fantasy sports participation. The ease of access in legalized channels for both activities could be driving the higher crossover. Another potential factor is the number of die-hard sports fans in New Jersey amongst bettors/fantasy players compared to the national average. Sports fandom can potentially drive participation in fantasy sports and sports betting.

2

52% of New Jerseyans who participated in sports betting indicated that they played more fantasy sports in the past year. This is higher than the national average for sports bettors. This increase is encouraging since the legalization of sports betting has not negatively impacted the fantasy sports market.

3

Betting against friends or family is still the most popular option for New Jersey bettors (56%); however, betting on sports in casinos in New Jersey is the second most popular option (45%). When looking at New Jersey bettors who started in the past year, the percent who bet with family and friends and those who bet in casino was almost equal (39% vs 35%). This is encouraging as it shows that New bettors are more proportionately seeking out legal channels opposed to the gray market.

4

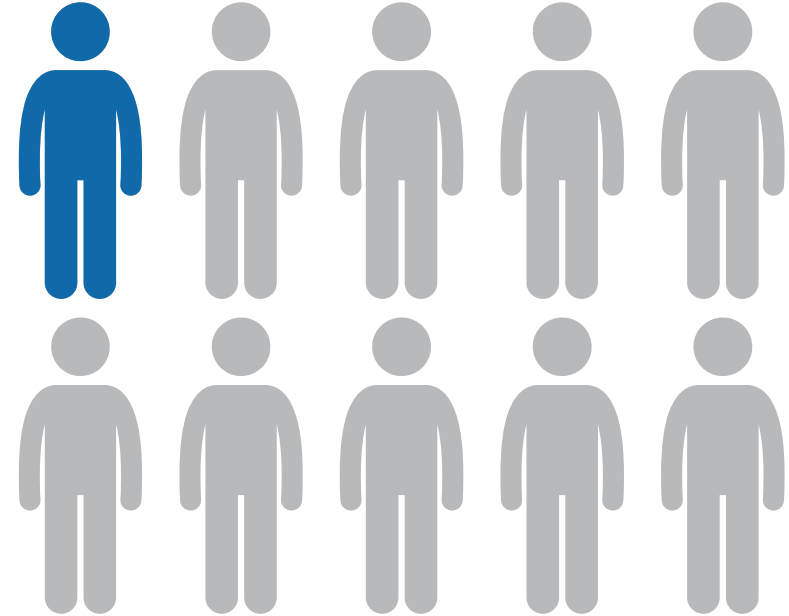
When it comes to Bookie Bettors, these players are the core bettors amongst New Jersey Sports Bettors. On average these players deposit a lot more money into their accounts and they deposit more frequently as well (more than 2-in-5 deposit weekly). Bookie Bettors value simplicity and efficiency, competitive odds/payouts and good promotions and bonuses more than the general New Jersey Sports Bettors. As a result, legal channels will need to work hard to encourage bookie bettors to move to these channels.

Sports Betting in New Jersey



26%

Proportion of New Jerseyans who bet on sports

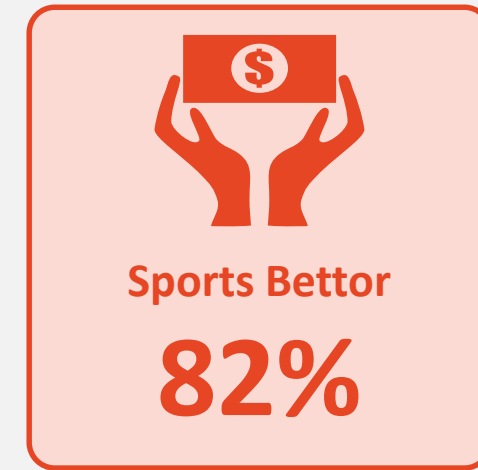
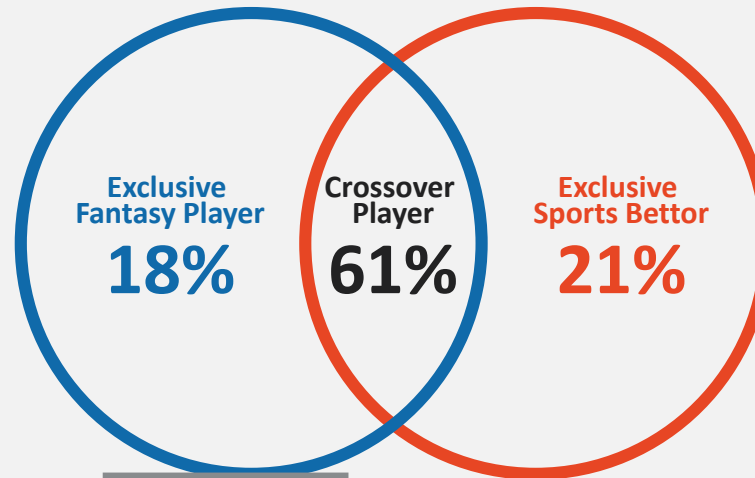


1 in 10

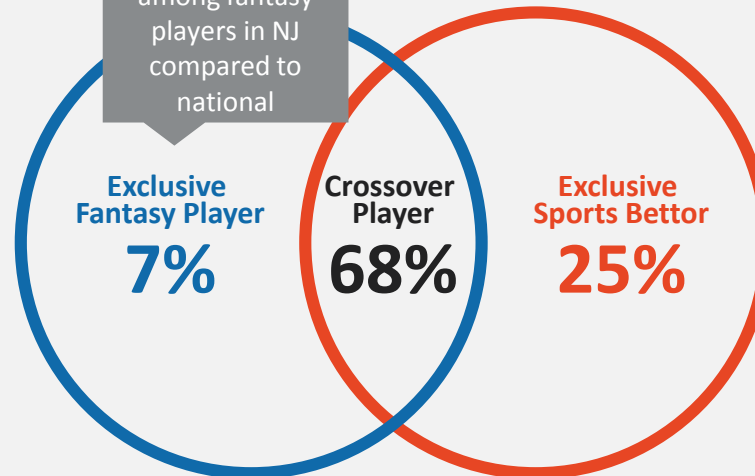
New Jersey players started betting on sports in the past year

Fantasy Sports and Sports Betting Participation

National Sports Bettors/
Fantasy Sports Players



NJ Sports Bettors/
Fantasy Sports Players



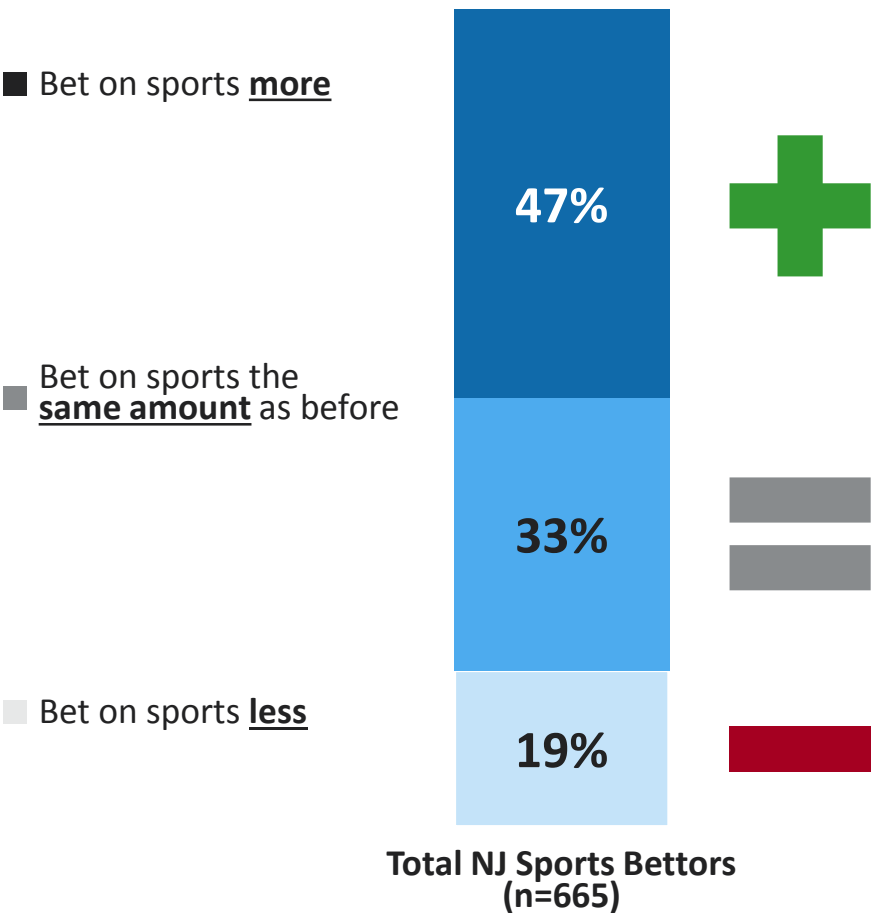
Base: Base: New Jersey Sports Bettors or Fantasy Players

A1. Please select the responses below that best describe your participation level in Fantasy Sports since April of 2018 (within the past 12 months).

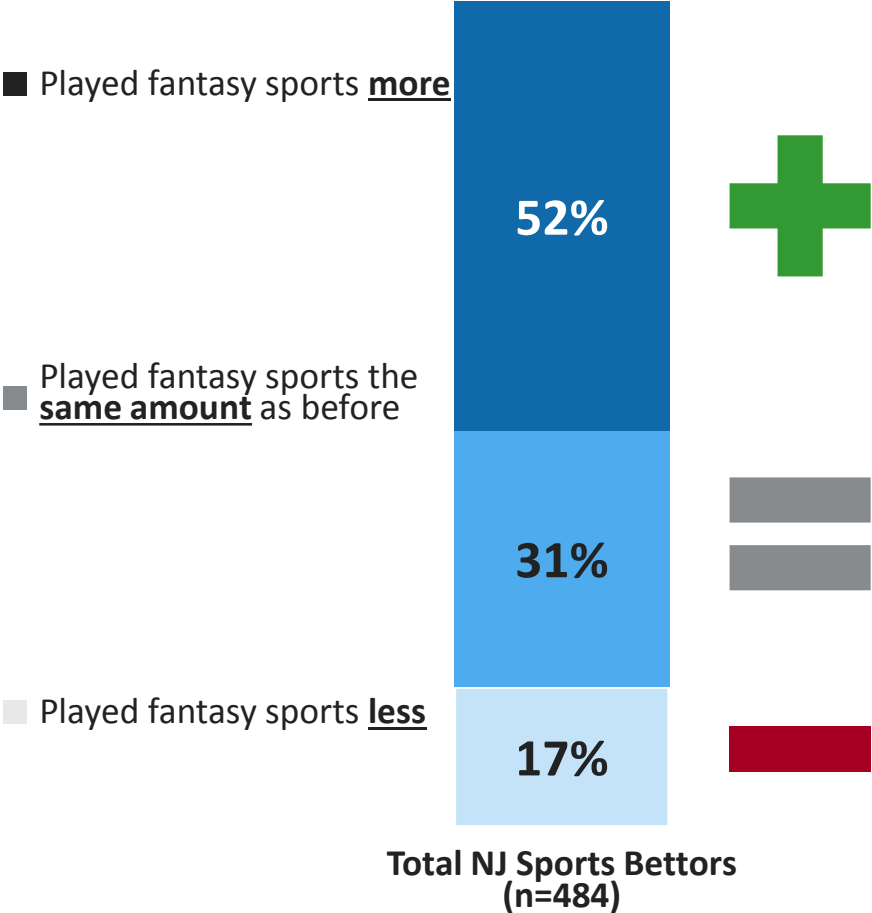
A2. Which of the following sports/sports leagues, if any, have you bet on since April of 2018 (within the past 12 months).

Change in Sports Betting/Fantasy Sports Over Past Year

Change in Sports Betting



Change in Fantasy Sports Participation



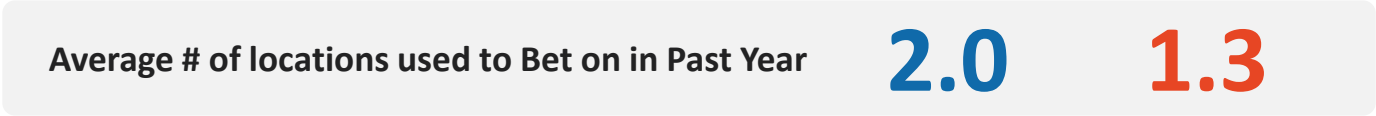
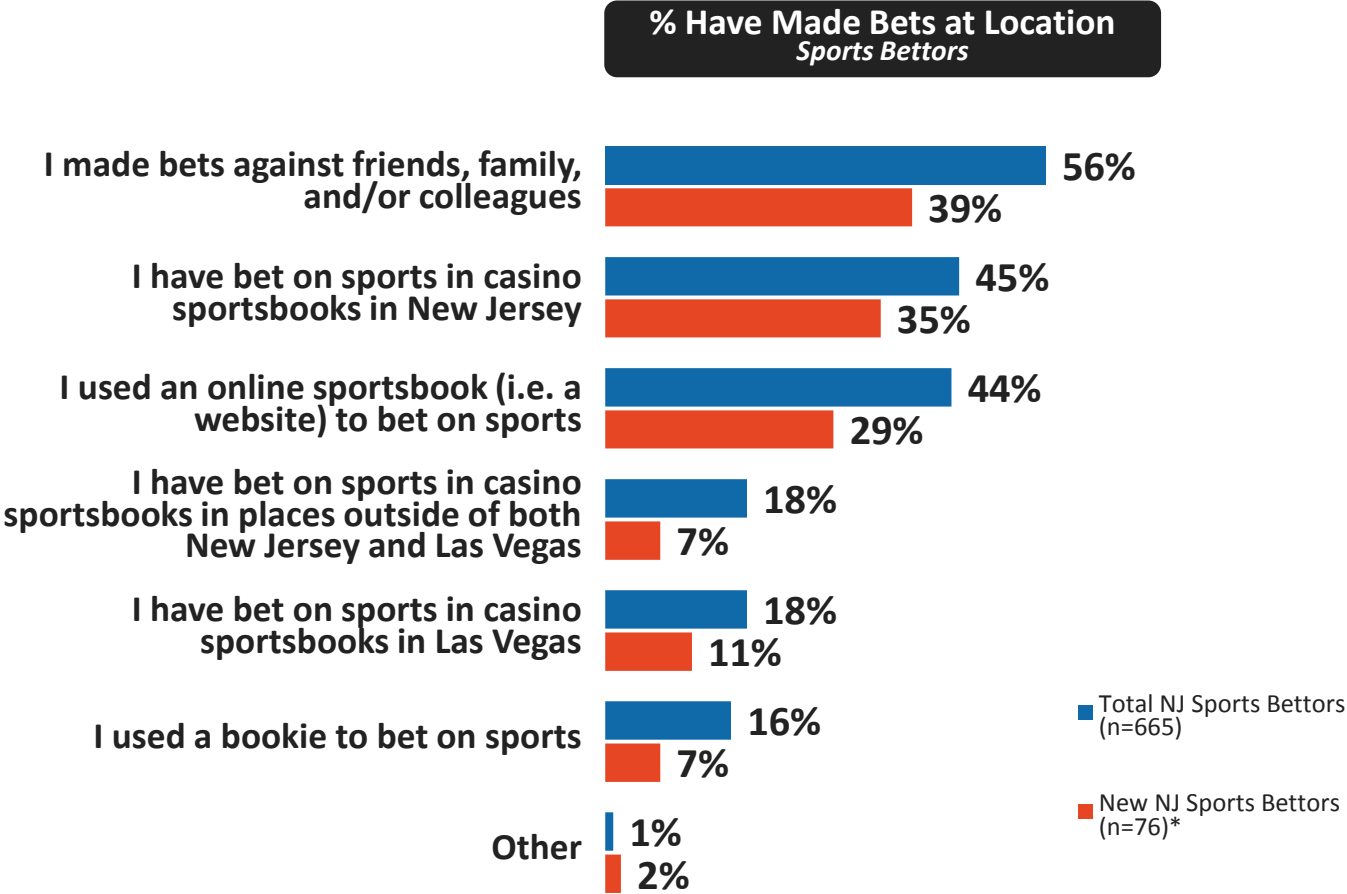
Base: New Jersey Sports Bettor

* Small base size, interpret with caution.

Years and Locations Spent Betting on Sports



Base: Sports Bettors



* Small base size, interpret with caution.

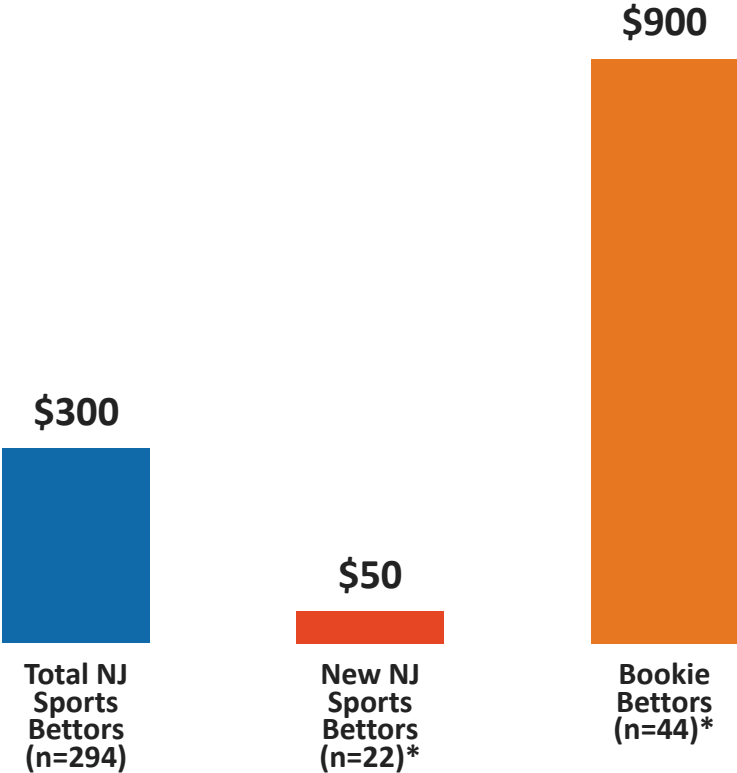
** base size too small to report

Average # Of Years Betting Using This Method
Total NJ Sports Bettors (n=varies)
10.5
2.8
4.1
4.7
5.7
8.9
**

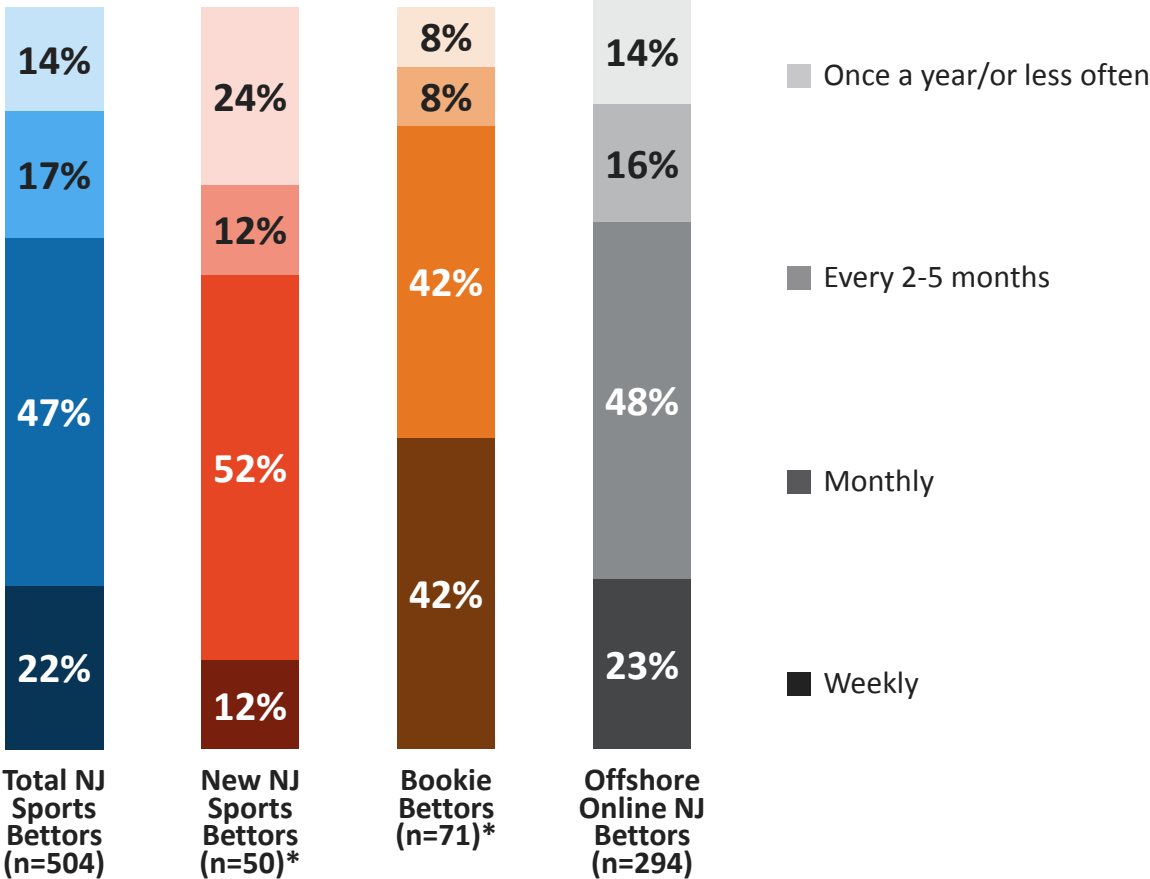
B5. For how many years have you been betting on sports?
B6. Thinking only of your sports betting activity, where have you made your bets in the past 12 months?
B8. For how many years have you been betting on sports in the following ways?

Online Sportsbook Initial Deposit and Deposit Frequency

\$ Amount Initially Deposited Into Betting Site
Median (Any Website NET)



Deposit Frequency Into Any Account For Betting

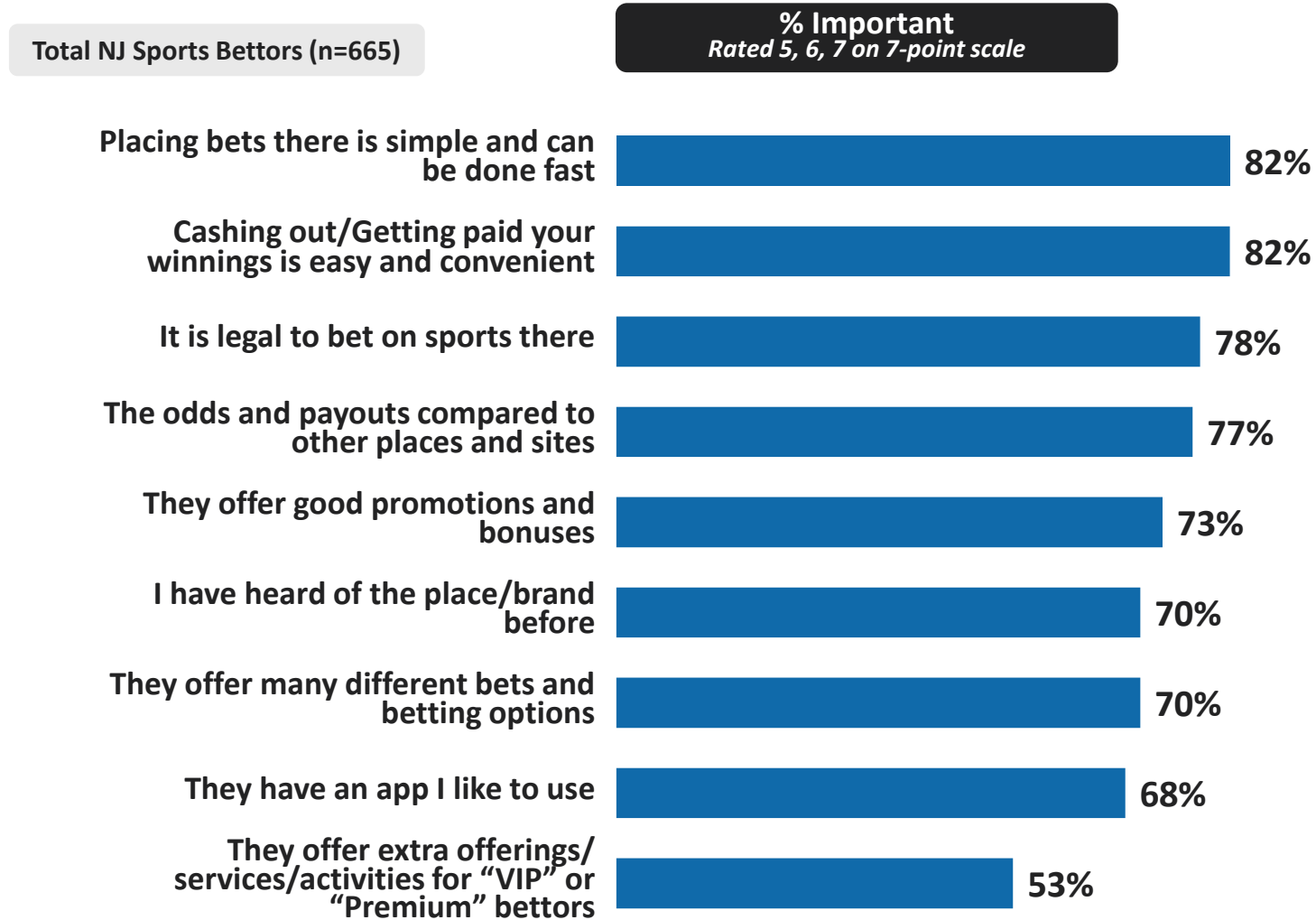


Base: Use online sportsbook to bet on sports
B9. Thinking about when you first opened an account at the following sports betting sites, how much money did you initially deposit into your account?

Base: Sports Bettors
B10. How often would you say you currently upload money into your account?

* Small base size, interpret with caution.

Importance When Choosing Location To Make Sports Bets

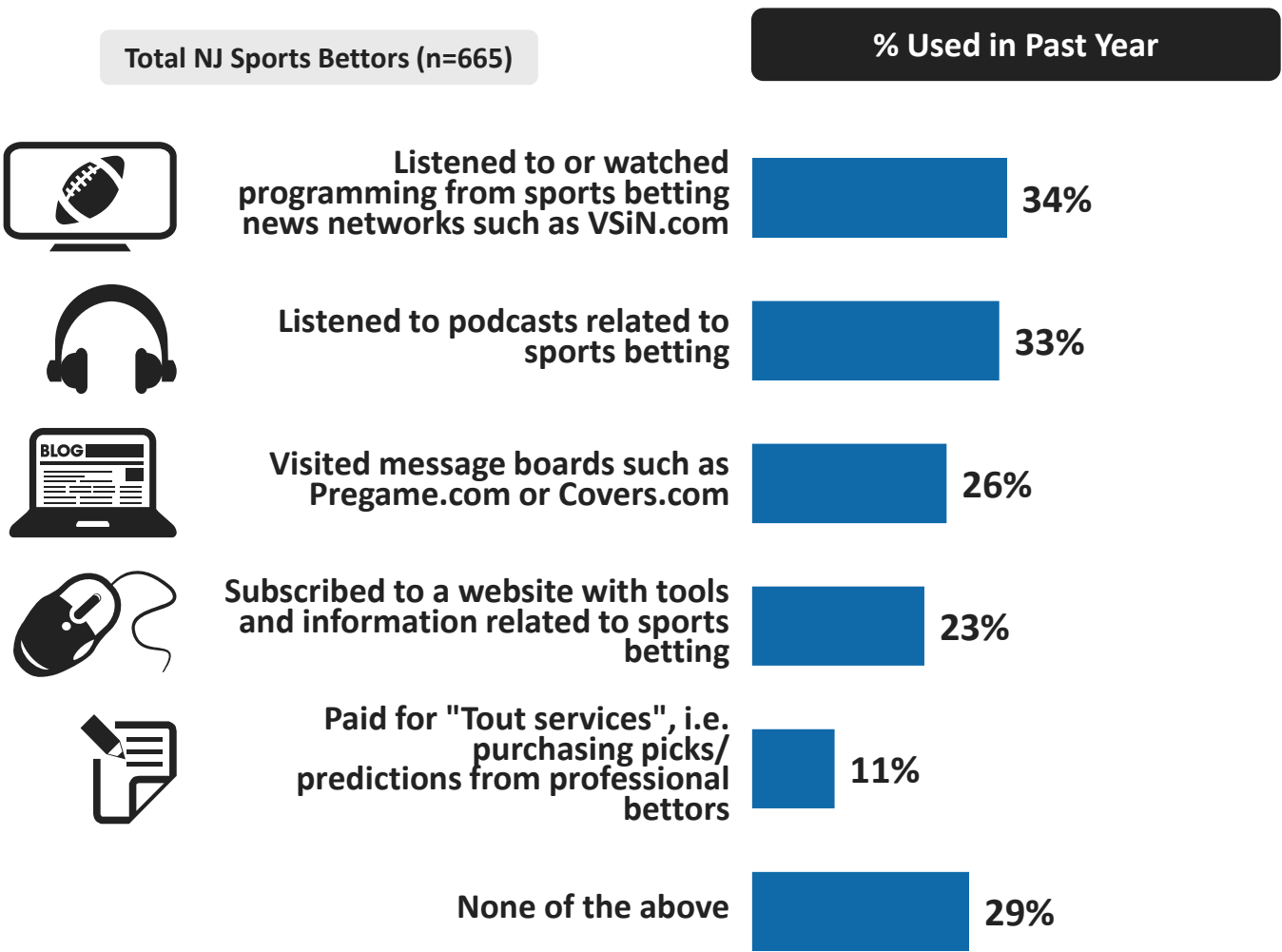


% Important (Rated 5, 6, 7 on 7-point scale)			
New NJ Sports Bettors (n=76)* [A]	Established NJ Bettors (n=589) [B]	Bookie Bettors (n=107)	Offshore Online NJ Bettors (n=294)
78%	83%	87%	87%
74%	83%	82%	86%
73%	78%	74%	84%
61%	79% A	83%	83%
72%	73%	78%	84%
64%	71%	69%	79%
69%	70%	66%	81%
65%	68%	67%	81%
46%	54%	61%	63%

Base: New Jersey Sports Bettors

* Small base size, interpret with caution.

Sports Betting Resources Used in Past Year



% Used in Past Year			
New NJ Sports Bettors (n=76)* [A]	Established NJ Bettors (n=589) [B]	Bookie Bettors (n=107)	Offshore Online NJ Bettors (n=294)
24%	35% A	41%	41%
24%	34%	41%	36%
16%	27% A	41%	34%
8%	24% A	33%	27%
7%	12%	17%	12%
43% B	27%	18%	25%

Base: New Jersey Sports Bettors

* Small base size, interpret with caution.

BRAND CONSUMPTION

Key Findings



1

We know that fantasy players and sports bettors skew younger, male, and higher income generally. As a result, their brand consumption habits are different than the average consumer. When looking at apparel purchases over the last 60 days, these players/bettors over index on every brand (sometimes even 400% higher than the gen pop). Brands like Jordan, Adidas, and Supreme are often targeted towards younger males who are affluent, and these brands have connections to the sporting world as well. Which can explain why the disparity between players/bettors and the general population. Also given the demographics of these players/bettors they own more technology and they are more active on social media. Fantasy and sports betting brands should continue to leverage these channels to reach their customers.

2

When it comes to potential partnerships for Fantasy and sports betting companies, one category to consider is the food delivery apps. Roughly one quarter of these players/bettors use a food delivery app every week. Currently, there none of these companies are members of the FSGA. Different sports betting or fantasy platforms could look to partner to offer exclusive coupons or codes in season for their users. This is a relatively new industry that could show potential for partnerships between companies given the high usage among players/bettors.

Device(s) Owned and Used

■ Gen Pop (n=1,000)

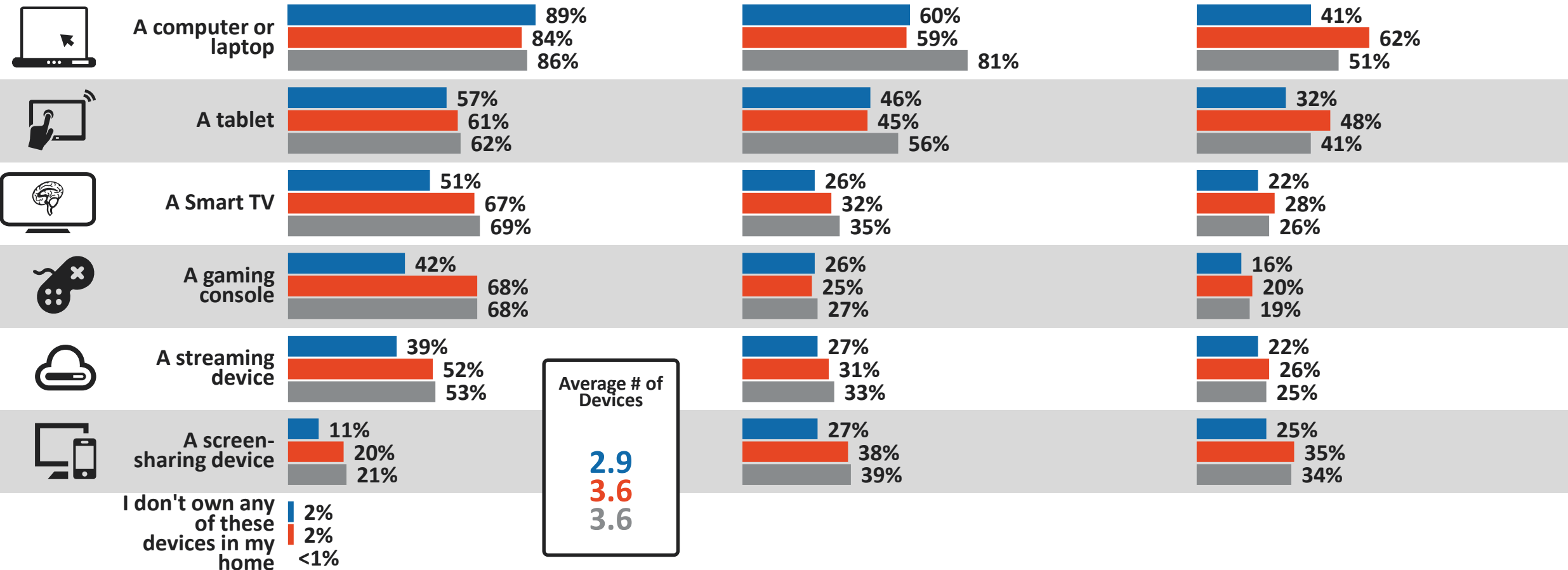
■ National Sports Bettors (n=1,577)

■ National Fantasy Players (n=1,524)

% Own Device

Use Device For Fantasy Sports

Use Device For Sports Betting



Base: All Answering

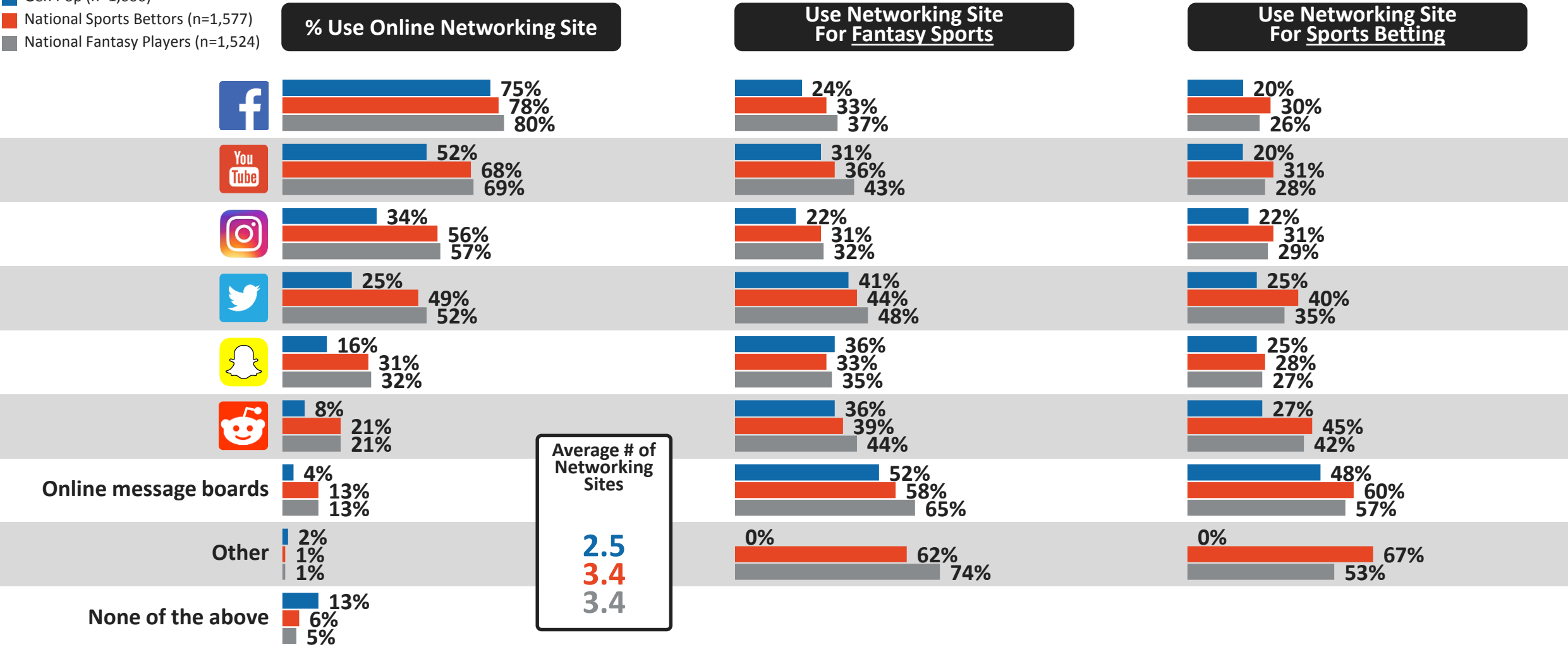
C2. Which of the following devices do you currently own in your home?

Base: Own [INSERT DEVICE FROM C2] (n=varies)

C2A. Which of the following devices do you use for purposes related to the following?

Online Networking Site(s) Used

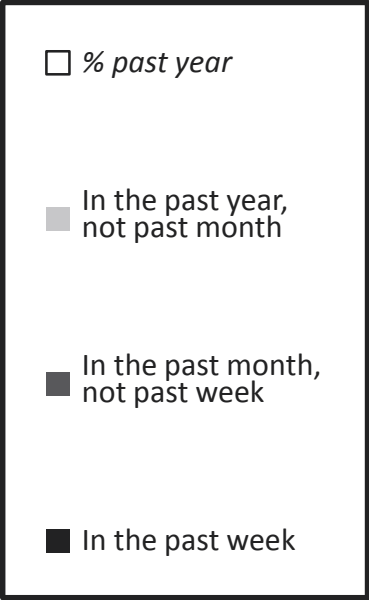
■ Gen Pop (n=1,000)
■ National Sports Bettors (n=1,577)
■ National Fantasy Players (n=1,524)



Base: All Answering
C3. Which online networking sites do you typically use?

Base: Use [INSERT ONLINE NETWORKING SITE] (n=varies)
C3A. Which of the following sites do you use to gain information specifically related to the following?

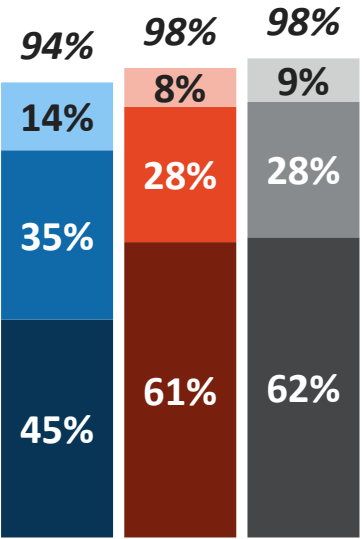
Activity Participation



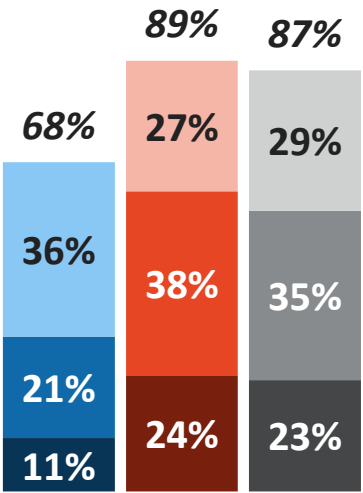
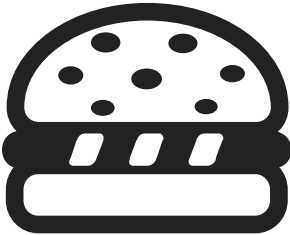
■ Gen Pop (n=1,000)

■ National Sports Bettors (n=1,577)

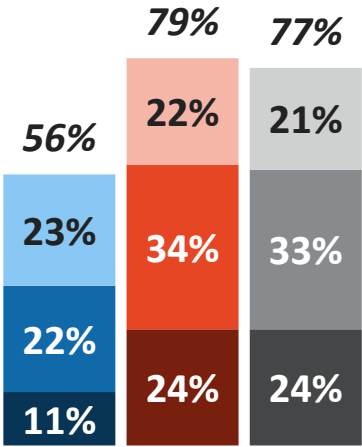
■ National Fantasy Players (n=1,524)



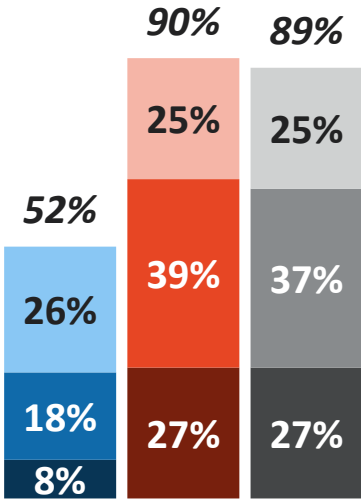
Visited a fast food restaurant



Visited a fine dining restaurant



Visited a Café or Bistro



Visited a sports bar

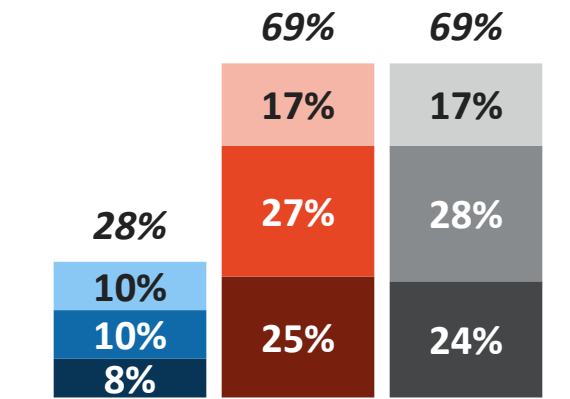
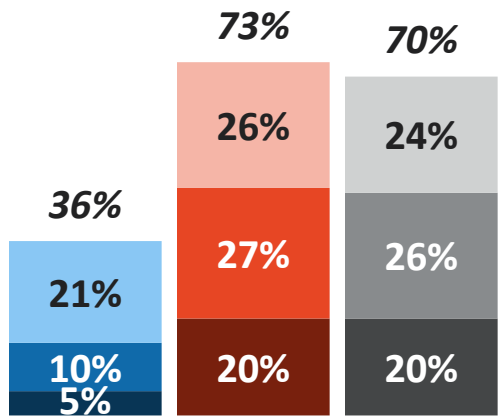
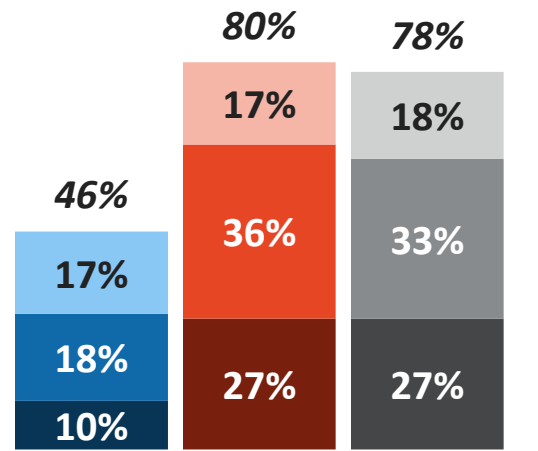


Base: All Answering

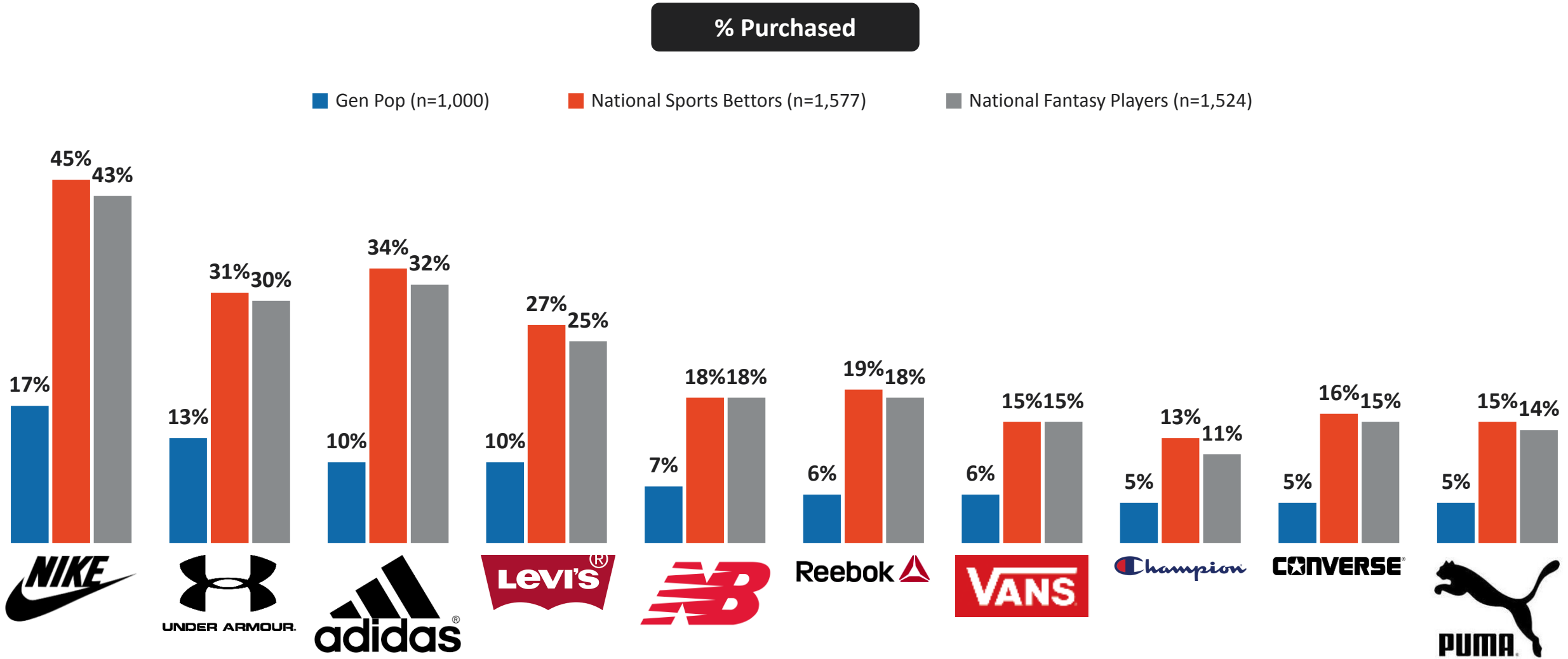
C4. Which of the following activities have you participated in?

Activity Participation (continued)

■ Gen Pop (n=1,000) ■ National Sports Bettors (n=1,577) ■ National Fantasy Players (n=1,524)

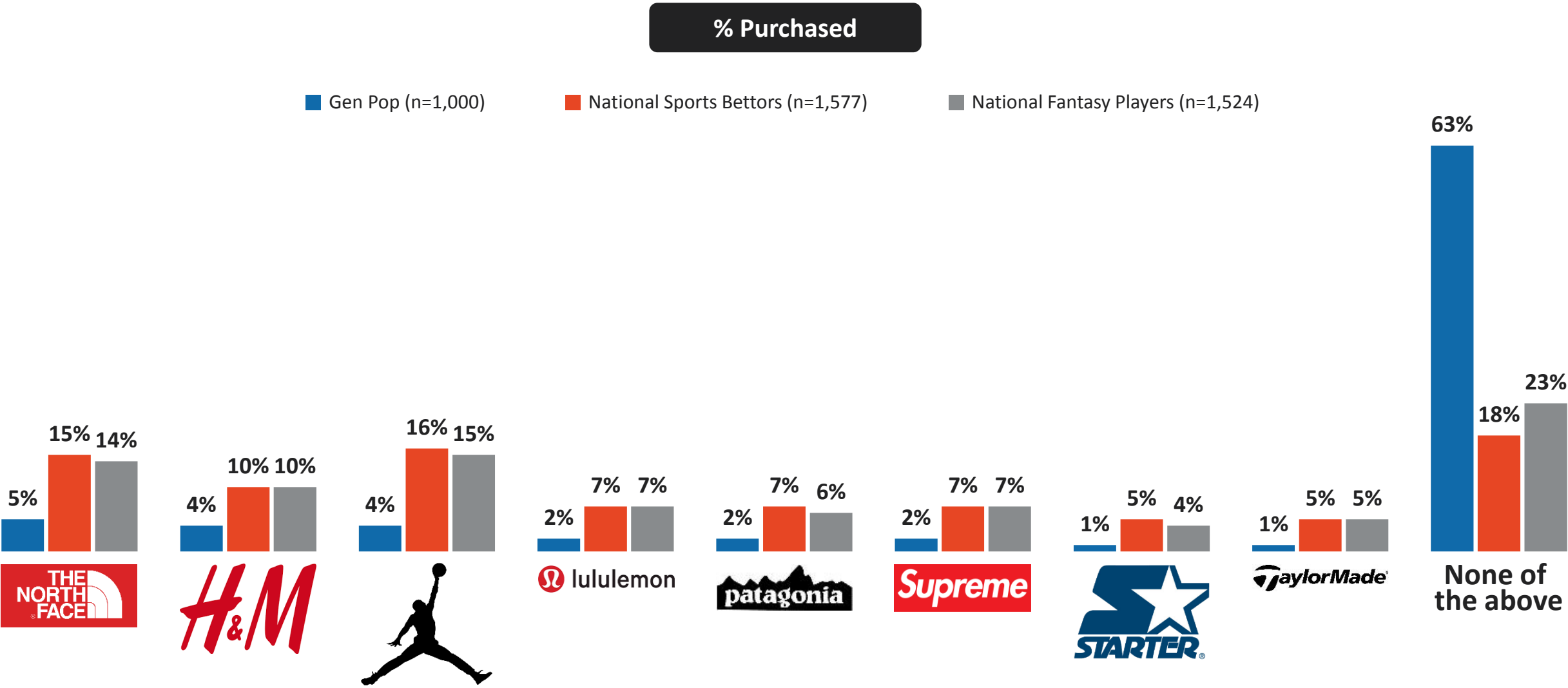


Apparel Brands Purchased



Base: All Answering

Apparel Brands Purchased (continued)



DEMOGRAPHIC COMPARISONS



Demographics (continued)

	Gen Pop (n=1,000)	NATIONAL PLAYERS				NEW JERSERY PLAYERS				
		Fantasy Players (n=1,556)	Sports Bettors (n=1,618)	Traditional Fantasy Players (n=1,296)	DFS Players (n=755)	Fantasy Players (n=532)	New NJ Sports Bettors (n=76)*	Sports Bettors (n=665)	Traditional Fantasy Players (n=429)	DFS Players (n=323)
GENDER										
Male	48%	81%	80%	81%	83%	81%	71%	79%	82%	83%
Female	52%	19%	20%	19%	17%	19%	29%	21%	18%	17%
AGE										
18 to 34	29%	50%	50%	47%	53%	51%	66%	47%	49%	53%
35 to 54	34%	42%	40%	43%	43%	42%	23%	40%	43%	43%
55 and over	37%	8%	11%	9%	3%	7%	11%	12%	8%	4%
Average	49.2	37.7	38.1	38.5	35.5	36.6	35.9	38.5	37.5	35.7
REGION										
Northeast	18%	19%	20%	20%	19%	100%	100%	100%	100%	100%
Midwest	21%	24%	20%	25%	20%	-	-	-	-	-
South	38%	34%	34%	35%	35%	-	-	-	-	-
West	24%	22%	26%	20%	26%	-	-	-	-	-

* Small base size, interpret with caution.

Northeast: CT, ME, MA, NH, NJ, NY, PA, RI, VT

Midwest: IL, IN, IA, KS, MI, MN, MO, NE, ND, OH, SD, WI

South: AL, AR, DE, DC, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV

West: AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY

Demographics (continued)

	Gen Pop (n=1,000)	NATIONAL PLAYERS				NEW JERSERY PLAYERS				
		Fantasy Players (n=1,556)	Sports Bettors (n=1,618)	Traditional Fantasy Players (n=1,296)	DFS Players (n=755)	Fantasy Players (n=532)	New NJ Sports Bettors (n=76)*	Sports Bettors (n=665)	Traditional Fantasy Players (n=429)	DFS Players (n=323)
EMPLOYMENT STATUS										
Employed full-time	41%	67%	65%	67%	73%	72%	43%	67%	75%	76%
Employed part-time	7%	9%	9%	8%	7%	8%	15%	10%	7%	7%
Self employed	6%	6%	7%	6%	6%	5%	9%	6%	4%	6%
Unemployed but looking for a job	5%	4%	4%	4%	4%	3%	12%	3%	2%	3%
Unemployed and not looking for a job/Long-term sick or disabled	6%	4%	3%	4%	2%	1%	-	1%	<1%	1%
Full-time parent, homemaker	6%	3%	2%	3%	2%	2%	7%	2%	3%	2%
Retired	26%	5%	6%	6%	2%	3%	6%	6%	4%	1%
Student/Pupil	2%	3%	3%	3%	4%	5%	7%	4%	4%	4%
Military	<1%	<1%	<1%	<1%	<1%	<1%	-	<1%	<1%	-
Prefer not to answer	1%	<1%	<1%	<1%	<1%	1%	1%	1%	<1%	<1%
EDUCATION										
High school or less	20%	16%	19%	15%	17%	20%	20%	20%	19%	20%
Some college	34%	31%	30%	30%	29%	28%	28%	30%	27%	24%
Bachelors degree or higher	46%	53%	51%	55%	54%	52%	53%	50%	54%	55%

* Small base size, interpret with caution.

Demographics (continued)

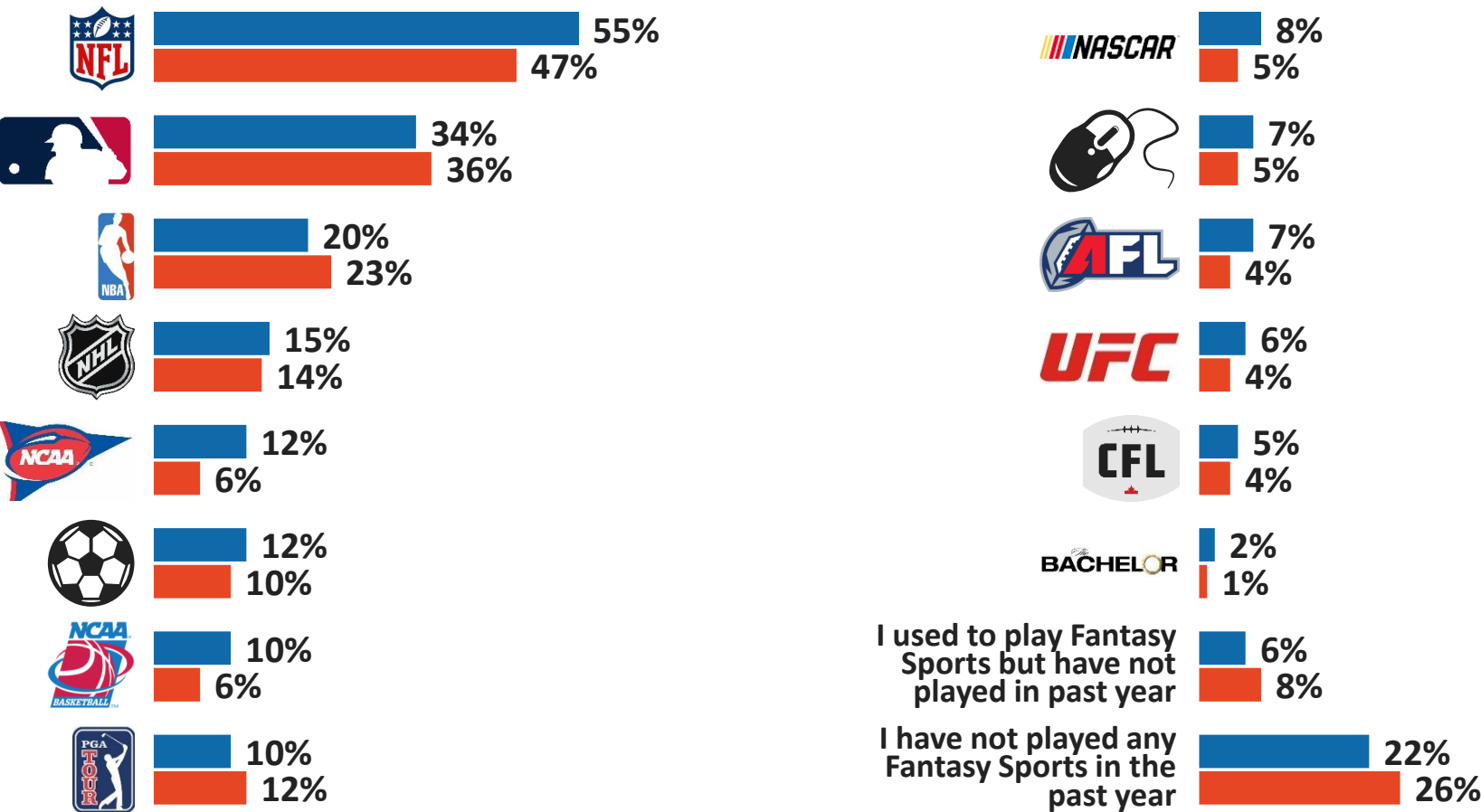
	Gen Pop (n=1,000)	NATIONAL PLAYERS				NEW JERSERY PLAYERS				
		Fantasy Players (n=1,556)	Sports Bettors (n=1,618)	Traditional Fantasy Players (n=1,296)	DFS Players (n=755)	Fantasy Players (n=532)	New NJ Sports Bettors (n=76)*	Sports Bettors (n=665)	Traditional Fantasy Players (n=429)	DFS Players (n=323)
MARITAL STATUS										
Single, never married	24%	35%	36%	35%	37%	40%	51%	40%	37%	39%
Living with partner	8%	11%	11%	11%	11%	12%	6%	11%	13%	12%
Married	51%	48%	46%	48%	46%	41%	35%	41%	41%	43%
Widowed	5%	1%	1%	1%	1%	1%	2%	2%	1%	1%
Divorced or separated	12%	5%	6%	6%	4%	6%	6%	6%	7%	5%
INCOME										
Less than \$50K	42%	32%	33%	31%	27%	26%	38%	28%	22%	25%
\$50K to less than \$75K	19%	21%	20%	22%	23%	26%	28%	23%	26%	26%
\$75K to less than \$100K	17%	24%	24%	23%	26%	18%	16%	19%	19%	16%
\$100K to less than \$150K	12%	15%	14%	16%	15%	15%	11%	15%	17%	17%
\$150K or more	5%	8%	7%	7%	7%	13%	4%	12%	14%	15%

* Small base size, interpret with caution.

APPENDIX

Fantasy Sports League Participation

% Past Year Participation



Average number of Fantasy Sports played

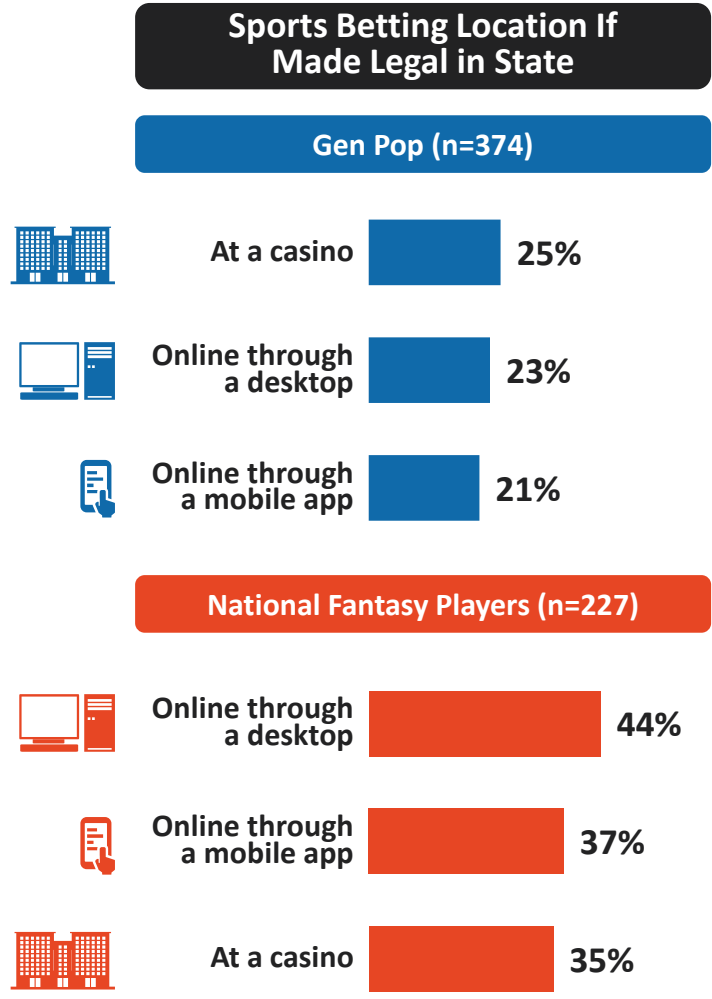
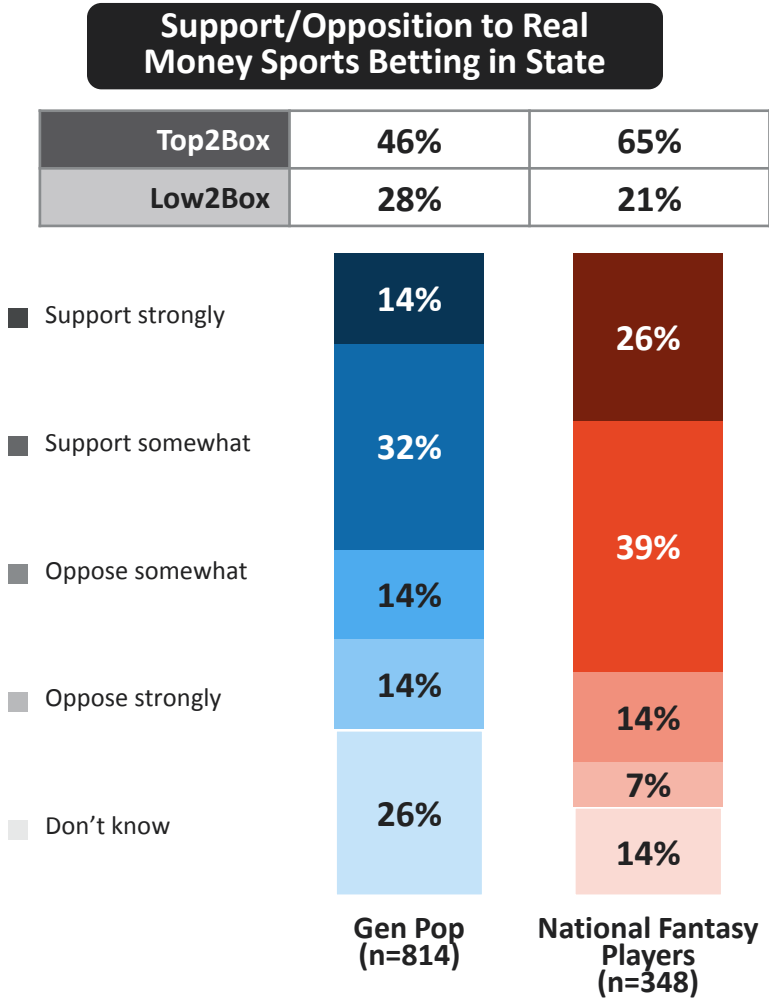
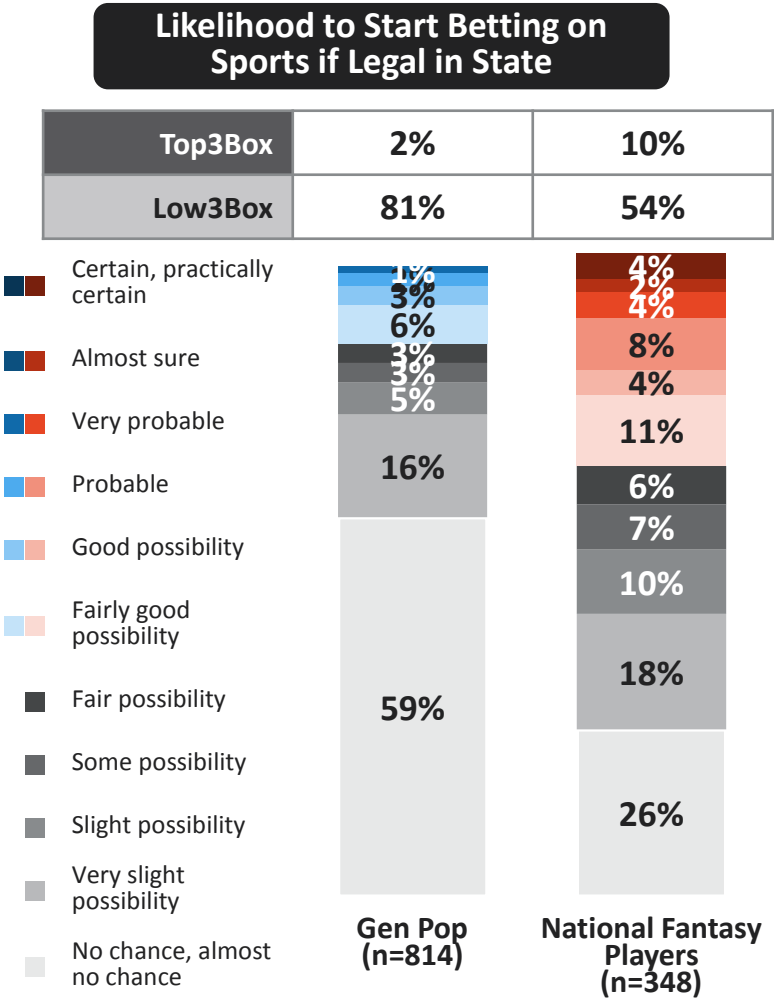
2.8

2.7

■ Total NJ Sports Bettors (n=665)

■ New NJ Sports Bettors (n=76)*

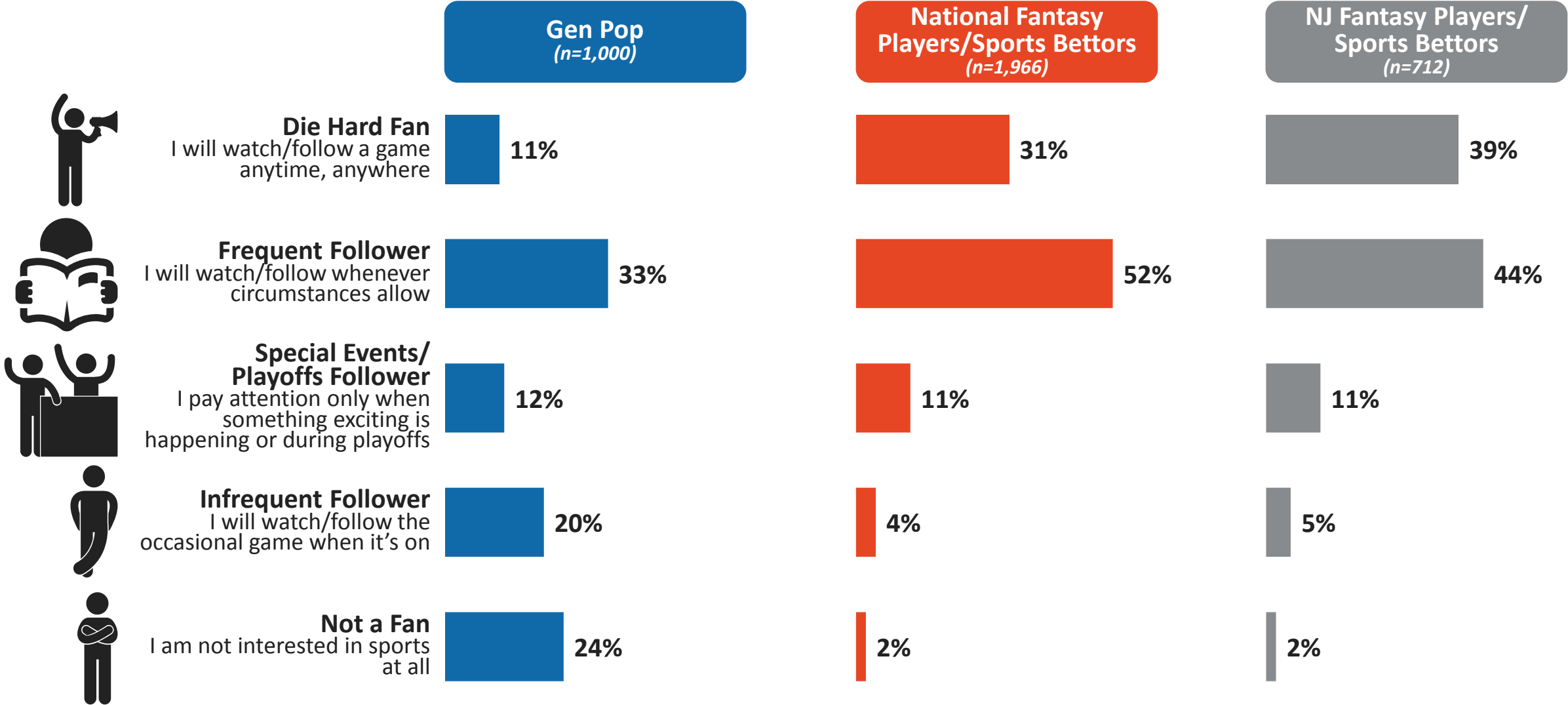
Sports Betting Legalization



Base: Have not bet on sports in the past year
A4. Using the following scale, how likely would you be to start participating in sports betting if it was legal in your state?
A5. Would you support or oppose sports betting for real money being legal in your state?

Base: Support Sports Betting being legalized
A5a. If sports betting became legal in your state, where would you participate?
Note: Only top 3 mentions per subgroup shown.

Level of Sports Fandom



Base: All respondents

Daily Fantasy Sports Initial Deposit and Deposit Frequency

National Fantasy Players/
Sports Bettors

Fanduel (n=414)

\$50

**\$ Amount Initially
Deposited Into DFS
Account**

Median

NJ Fantasy Players/
Sports Bettors

Fanduel (n=217)

\$100

**\$ Amount Initially
Deposited Into DFS
Account**

Median

DraftKings (n=478)

\$78

**\$ Amount Initially
Deposited Into DFS
Account**

Median

DraftKings (n=226)

\$100

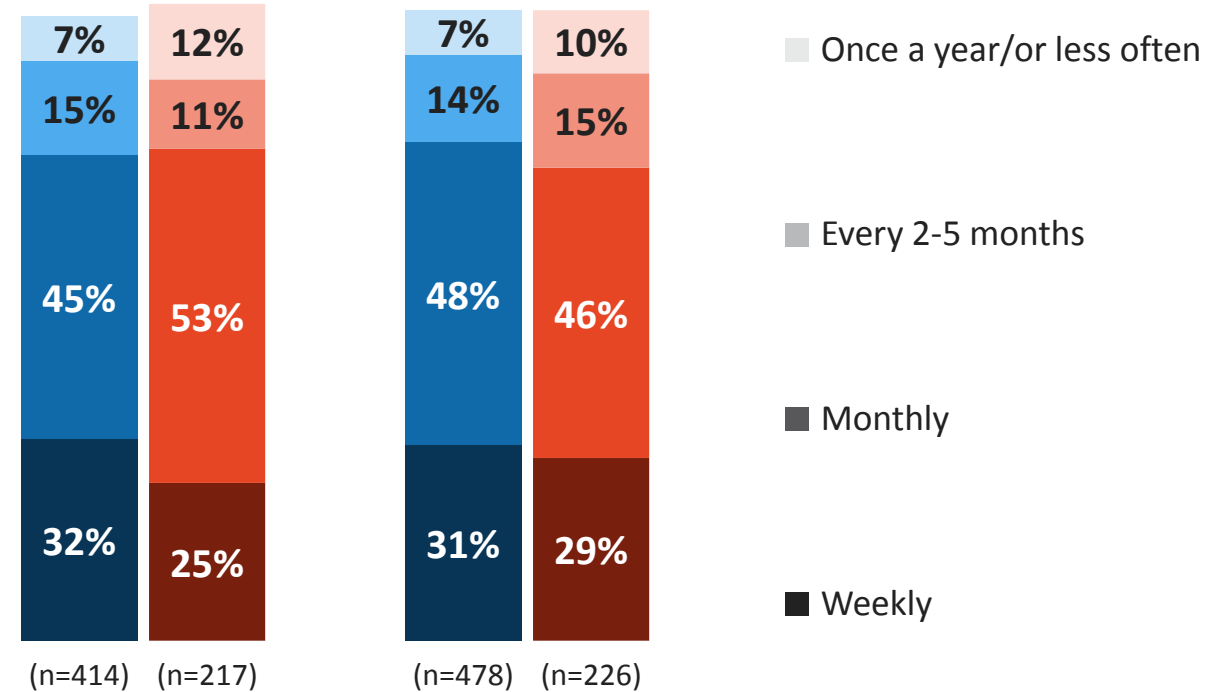
**\$ Amount Initially
Deposited Into DFS
Account**

Median

DFS Deposit Frequency When Sport Followed is in Season

National Fantasy Players/
Sports Bettors

NJ Fantasy Players/
Sports Bettors



Base: DFS Players

B3. Thinking about when you first opened an account at the following DFS sites, how much money did you initially deposit into your account?

B4. When the sports you follow are in season, how often would you say you currently upload money into a DFS account?

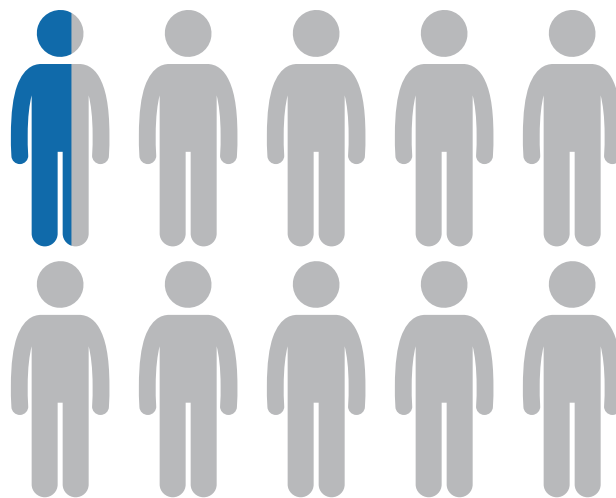
Years Playing Fantasy Sports



National Traditional
Fantasy Players
(n=1,296)

6.8

Years Spent Playing Traditional,
Season-Long Fantasy Sports
Mean



6%

Of Traditional Fantasy
Players started playing
Traditional Fantasy in the
past year



National DFS
Players
(n=755)

3.8

Years Spent Playing DFS
Mean



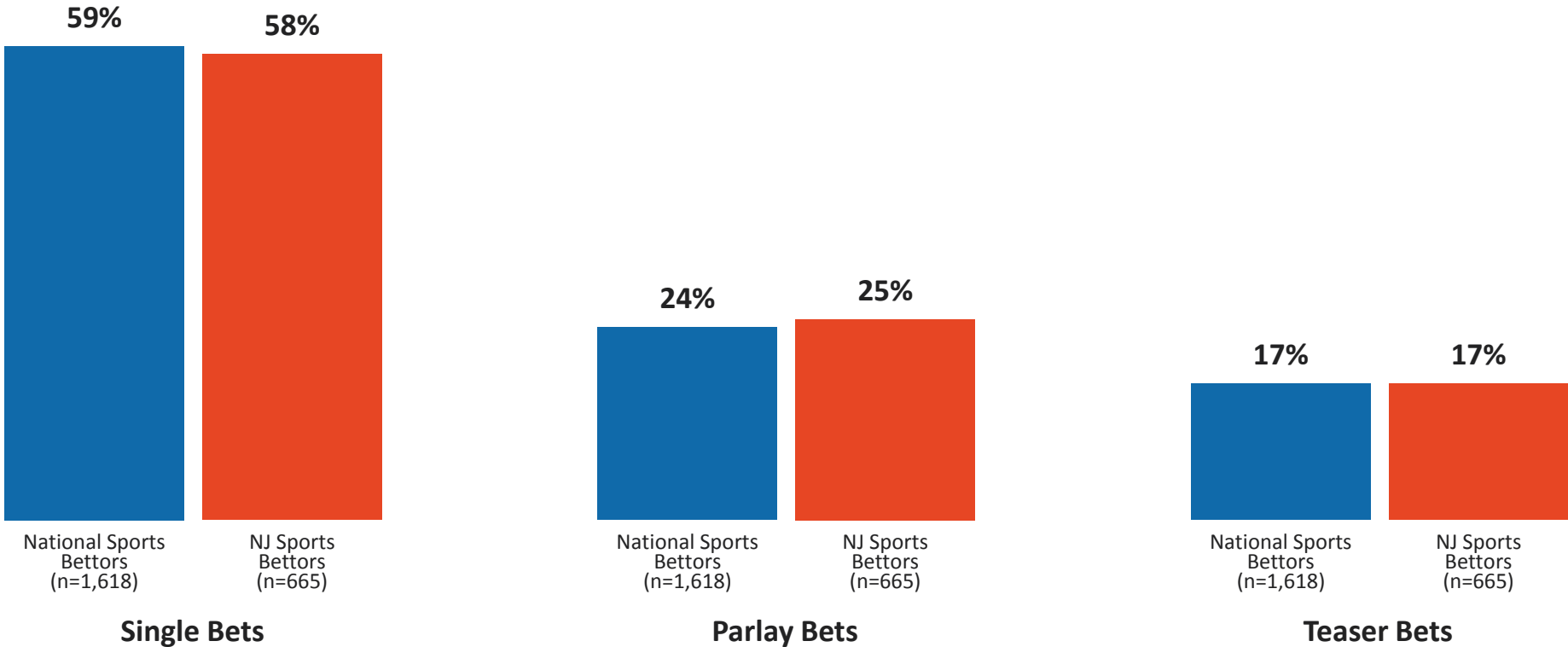
15%

Of DFS Players started
playing DFS in the past
year

Types of Bets Typically Made

Wager Size <i>Median</i>	\$50	\$50		\$50	\$50		\$50	\$40
-----------------------------	------	------	--	------	------	--	------	------

Average
proportion
of made bets

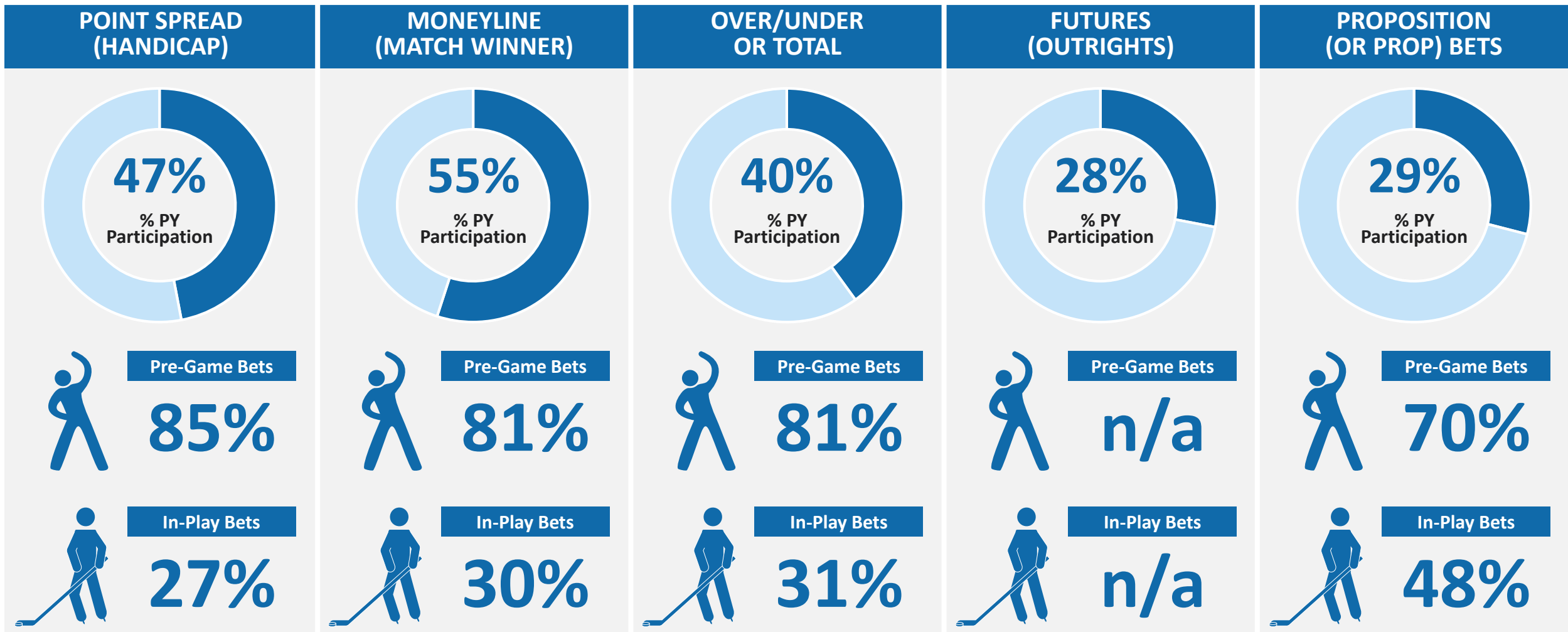


Base: Sports Bettors
B10B. Thinking of your sports bets, what proportion of your bets are single outcome bets, parlay bets, and teaser bets. Note: The total must add up to 100%.

Base: Have played [INSERT BET TYPE] in past year
B10B2. Thinking about a typical bet that you would make, what is the average size of the wager you would make for each of the following?

Single Outcome Bet Type Participation

NATIONAL SPORTS BETTORS (N=1,569)



Base: Single Bettors

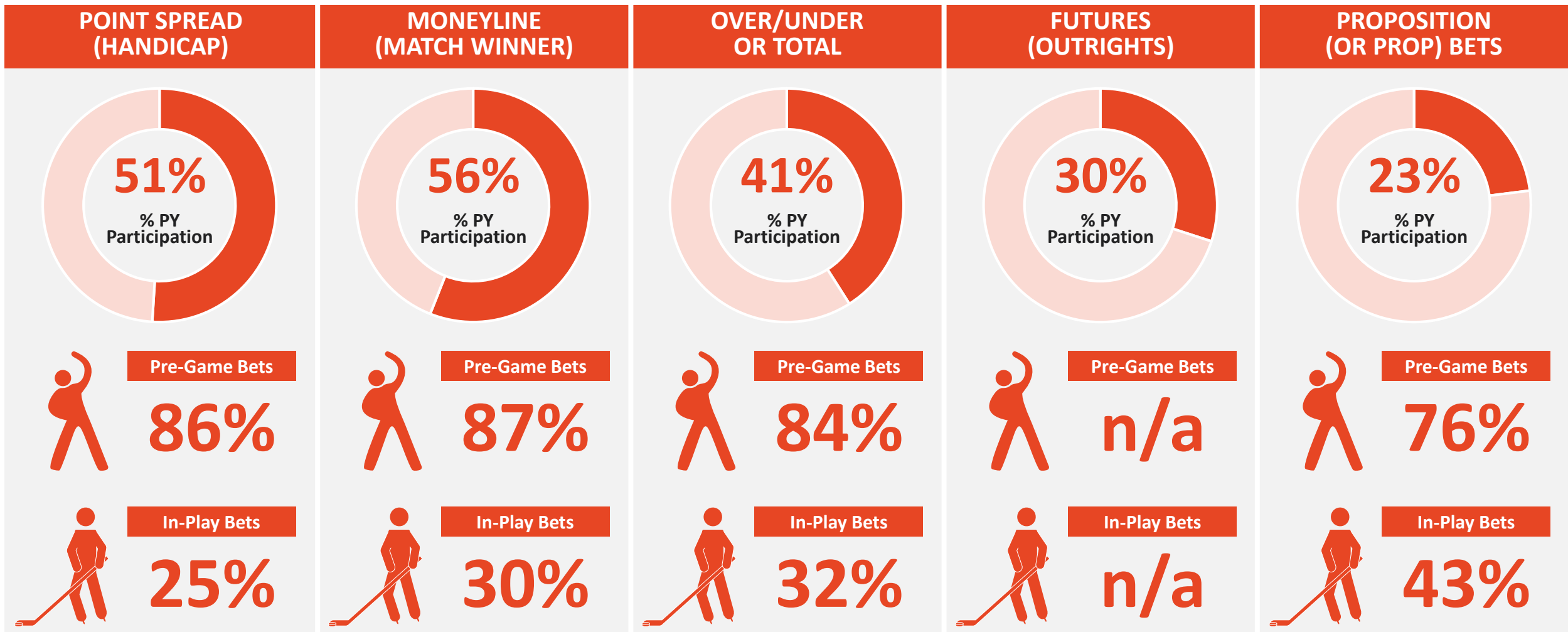
B10C. There are different types of single outcome bets. Which of the following have you participated in in the past 12 months.

Base: Have bet on [INSERT BET TYPE] in past year (n=varies)

B10C2. Depending on the game, you can often make bets either “pre-game” (before the game starts), or “in-play” (betting while the game is already live). For each of the following bet types, which of the following have you done in the past 12 months?

Single Outcome Bet Type Participation

NJ SPORTS BETTORS (N=645)



Base: Single Bettors

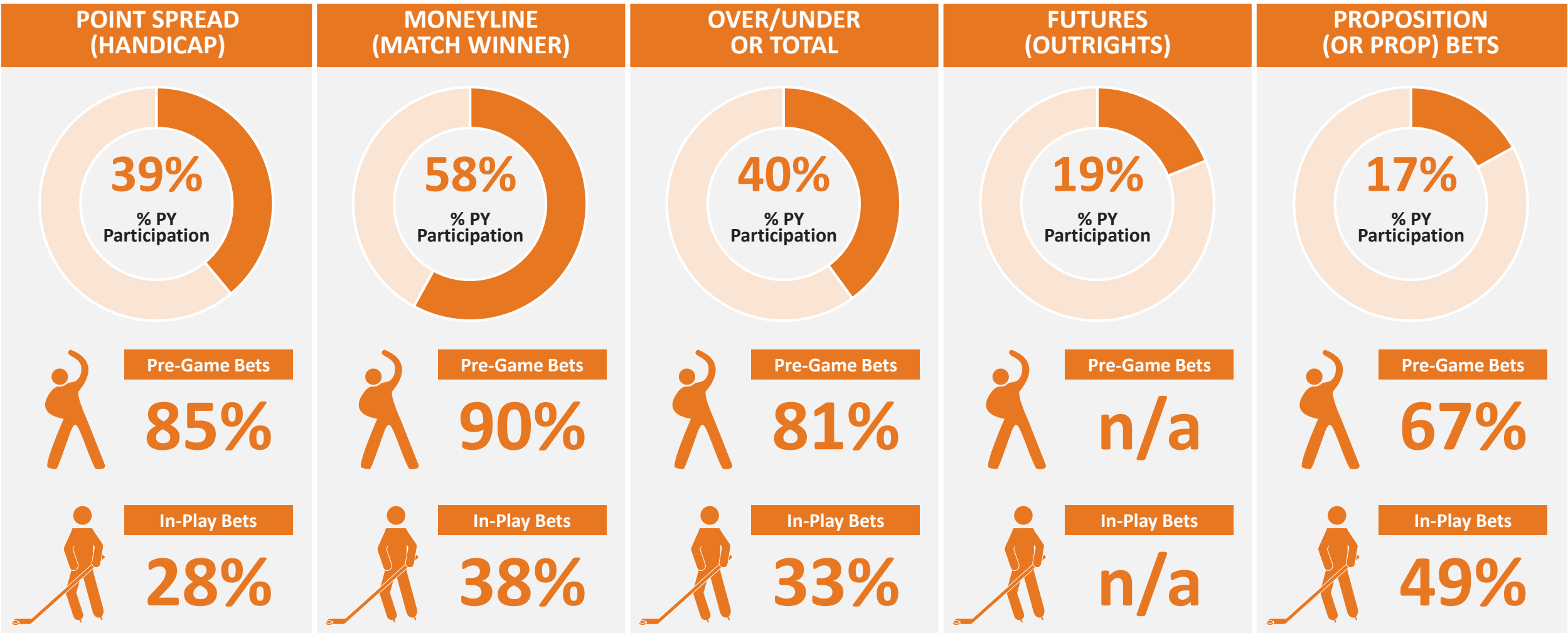
B10C. There are different types of single outcome bets. Which of the following have you participated in in the past 12 months.

Base: Have bet on [INSERT BET TYPE] in past year (n=varies)

B10C2. Depending on the game, you can often make bets either “pre-game” (before the game starts), or “in-play” (betting while the game is already live). For each of the following bet types, which of the following have you done in the past 12 months?

Single Outcome Bet Type Participation

NEW NJ SPORTS BETTORS (N=74)*



Base: Single Bettors
B10C. There are different types of single outcome bets. Which of the following have you participated in in the past 12 months.

Base: Have bet on [INSERT BET TYPE] in past year (n=varies)
B10C2. Depending on the game, you can often make bets either “pre-game” (before the game starts), or “in-play” (betting while the game is already live). For each of the following bet types, which of the following have you done in the past 12 months?

Unaided Brand Association (Fantasy Sports)



	Gen Pop (n=1,000)	National Sports Bettors (n=1,577)	National Fantasy Players (n=1,524)
NFL	8%	10%	11%
ESPN	6%	13%	17%
Football (general)	5%	3%	3%
Yahoo!/ Yahoo! Sports	5%	10%	15%
Draft Kings	4%	17%	16%
FanDuel	4%	13%	14%
CBS/ CBS Sports	2%	3%	5%
Fantasy Football	2%	1%	1%
Nike	1%	3%	3%
Other	7%	17%	17%
Nothing	46%	13%	8%
Don't know	15%	13%	12%

Base: All Answering

Note: Mentions 2% or less not shown.

Unaided Brand Association (Sports Betting)



	Gen Pop (n=1,000)	National Sports Bettors (n=1,577)	National Fantasy Players (n=1,524)
Draft Kings	2%	9%	9%
FanDuel	2%	8%	9%
NFL	2%	4%	4%
Bet365	1%	3%	3%
ESPN	1%	4%	4%
Nike	1%	2%	2%
Yahoo!/ Yahoo! Sports	1%	3%	4%
Other	8%	22%	20%
Nothing	70%	31%	31%
Don't know	10%	13%	13%

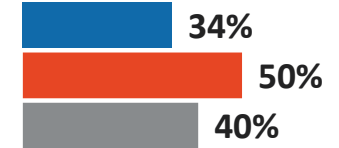
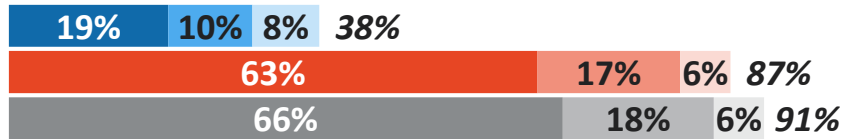
Visit Frequency to Websites/Apps

■ Weekly ■ Monthly, not weekly ■ Yearly, not monthly □ % Past year

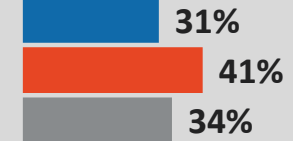
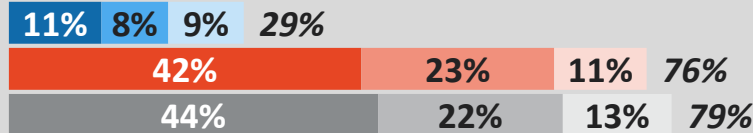
Use Website/App For Fantasy Sports Information

Use Website/App For Sports Betting Information

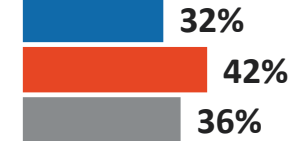
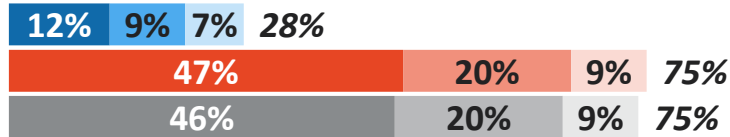
ESPN



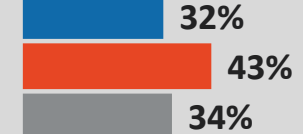
CBSSPORTS



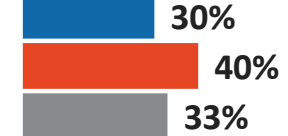
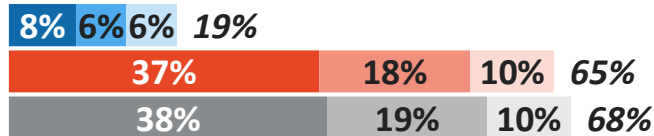
FOX SPORTS



YAHOO! SPORTS



B/R BLEACHER REPORT



Base: All Answering
C6. How often do you visit the following websites/apps?

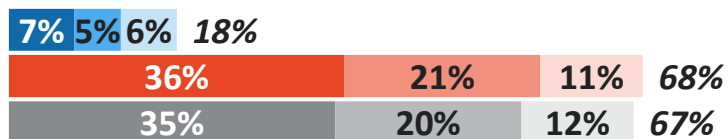
Base: Visit [INSERT SITE FROM C6] yearly or more often (n=varies)
C7. Which of the following sites/apps do you use to gain information specifically related to the following?

■ Gen Pop (n=1,000)
■ National Sports Bettors (n=1,577)
■ National Fantasy Players (n=1,524)

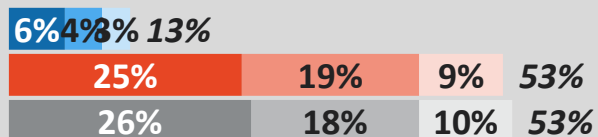
Visit Frequency to Websites/Apps (continued)

■ Weekly ■ Monthly, not weekly ■ Yearly, not monthly □ % Past year

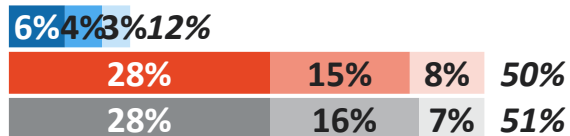
Sports Illustrated



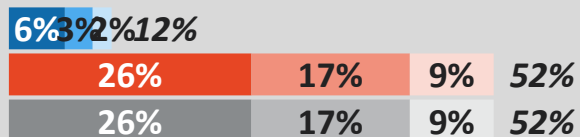
SBNATION



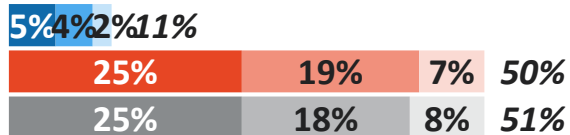
BARSTOOL SPORTS



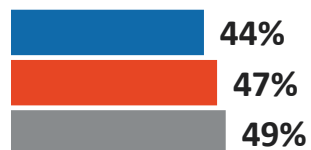
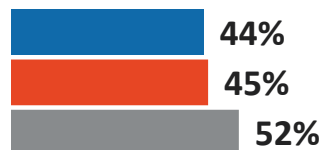
PFT



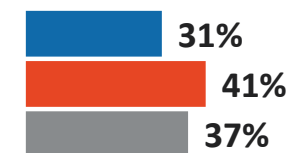
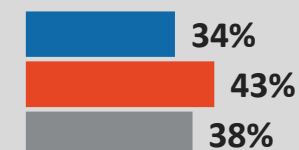
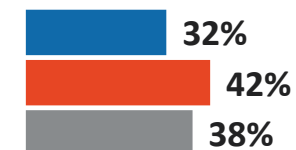
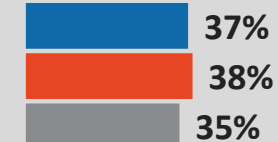
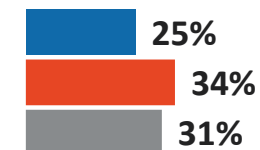
MLB TRADE RUMORS



Use Website/App For Fantasy Sports Information



Use Website/App For Sports Betting Information



Base: All Answering
C6. How often do you visit the following websites/apps?

Base: Visit [INSERT SITE FROM C6] yearly or more often (n=varies)
C7. Which of the following sites/apps do you use to gain information specifically related to the following?

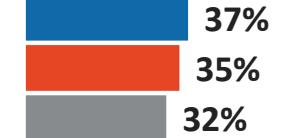
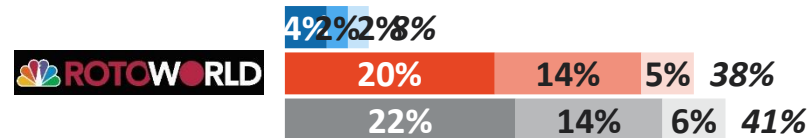
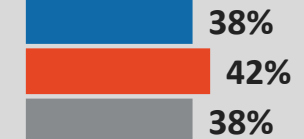
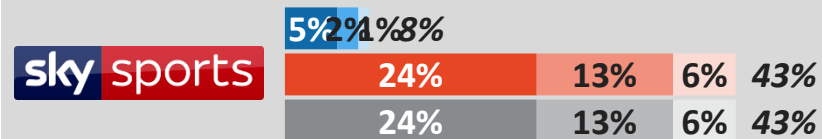
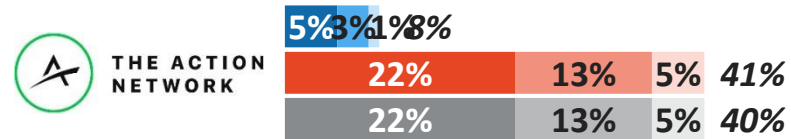
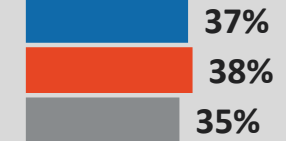
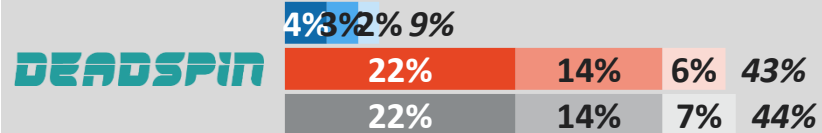
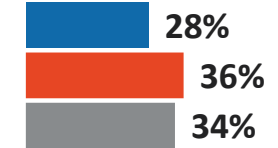
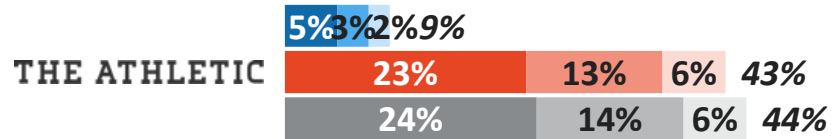
■ Gen Pop (n=1,000)
■ National Sports Bettors (n=1,577)
■ National Fantasy Players (n=1,524)

Visit Frequency to Websites/Apps (continued)

■ Weekly ■ Monthly, not weekly ■ Yearly, not monthly □ % Past year

Use Website/App For Fantasy Sports Information

Use Website/App For Sports Betting Information



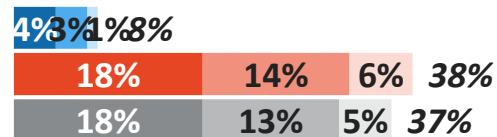
Base: All Answering
C6. How often do you visit the following websites/apps?

Base: Visit [INSERT SITE FROM C6] yearly or more often (n=varies)
C7. Which of the following sites/apps do you use to gain information specifically related to the following?

■ Gen Pop (n=1,000)
■ National Sports Bettors (n=1,577)
■ National Fantasy Players (n=1,524)

Visit Frequency to Websites/Apps (continued)

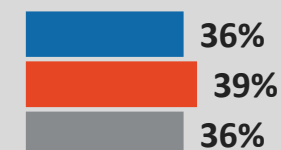
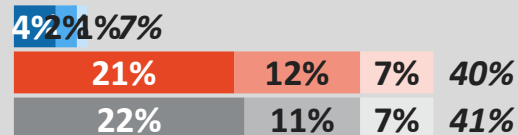
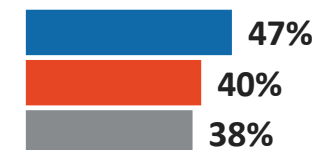
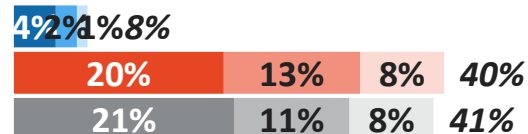
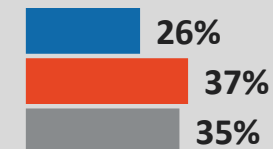
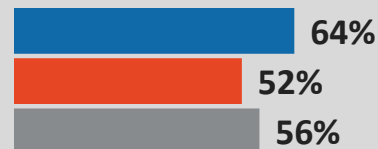
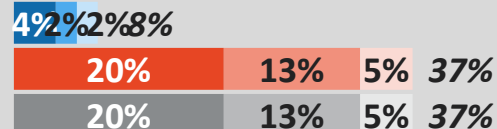
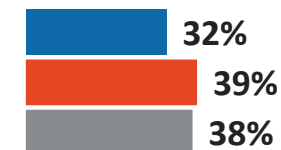
■ Weekly ■ Monthly, not weekly ■ Yearly, not monthly □ % Past year



Use Website/App For Fantasy Sports Information



Use Website/App For Sports Betting Information



Base: All Answering

C6. How often do you visit the following websites/apps?

Base: Visit [INSERT SITE FROM C6] yearly or more often (n=varies)

C7. Which of the following sites/apps do you use to gain information specifically related to the following?

■ Gen Pop (n=1,000)

■ National Sports Bettors (n=1,577)

■ National Fantasy Players (n=1,524)