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FANTASY SPORTS PLAYERS IN 2022: VALUE & OPPORTUNITY





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FANTASY SPORTS PLAYERS
ARE THE **MOST ENGAGED**
OF ALL SPORTS FANS TODAY,
BUT THEY ARE
UNDER-DEVELOPED.



Fantasy Sports Players, Defined

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A SMALL BUT HIGHLY ENGAGED GROUP

Fantasy players are heavily engaged in all types of sports activities. They spend, attend, bet, and engage in tech activities more than AVID fans.

Only 13% of Americans are active fantasy players. Another 13% are "lapsed" players who no longer play. Nearly $\frac{3}{4}$ of Americans have never played.



OPPORTUNITIES TO GROW

"Lapsed players" are most likely to say they don't play because they don't have the time.

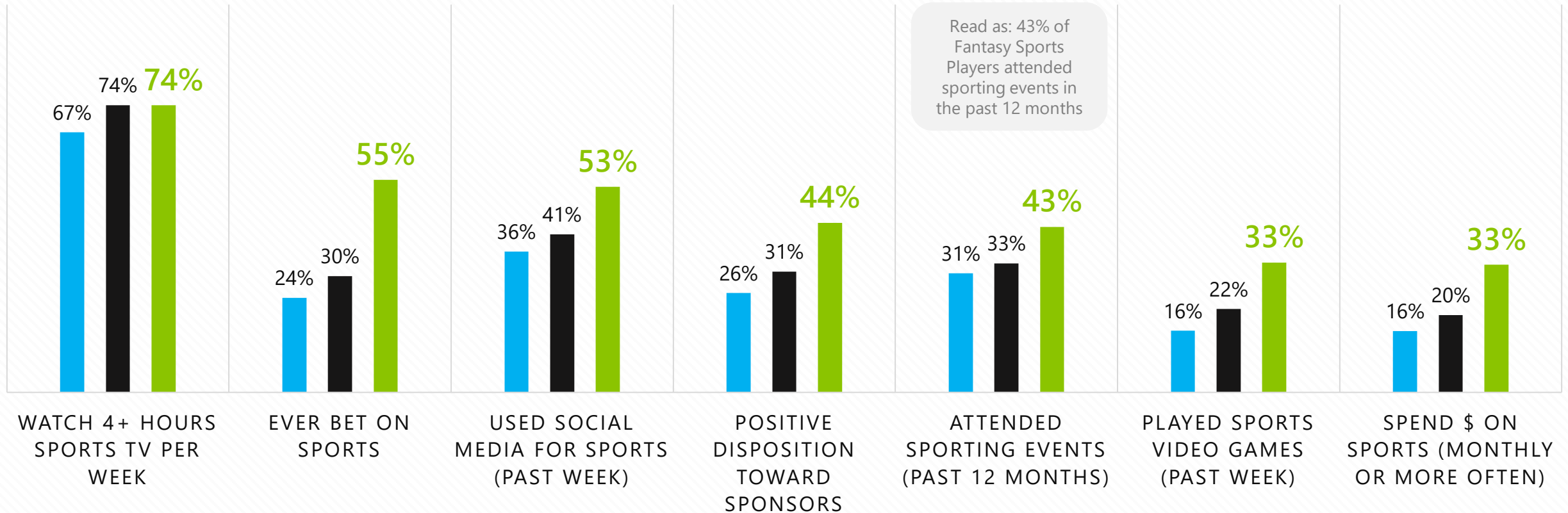
"Never players" are most likely to say they haven't played because they don't know much about fantasy. Nearly $\frac{1}{2}$ of AVID sports fans who have never played say lack of knowledge is a reason why.

Fantasy sports players are a valuable group because they are **HEAVILY ENGAGED** across all types of fan activities.



FAN ENGAGEMENT ACTIVITIES

■ Past Week Sports Viewer ■ AVID Sports Fan ■ Fantasy Sports Player



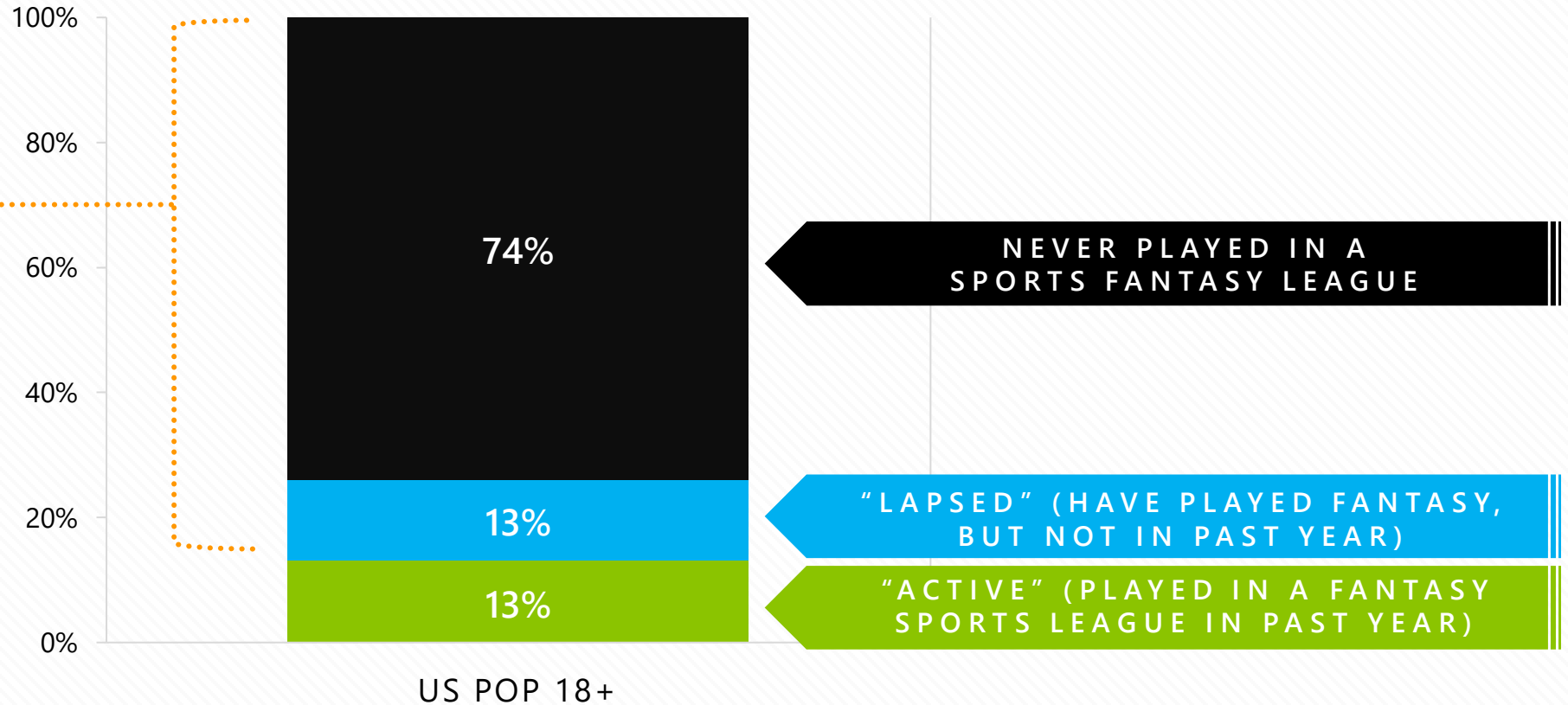
Data was collected from the SSRS/Luker On Trends Sports Poll, Jan – Jul 2022, a nationally representative sample of N=13023 Americans 12+

Only 13% of Americans currently play fantasy sports. For every active player, there is another "lapsed" one who no longer plays.

US POPULATION FANTASY SPORTS PARTICIPATION

■ Current fantasy sports player ■ Lapsed fantasy sports player ■ Never played fantasy sports

87% OF THE
POPULATION ARE
"LAPSED" OR
"NEVER" PLAYERS

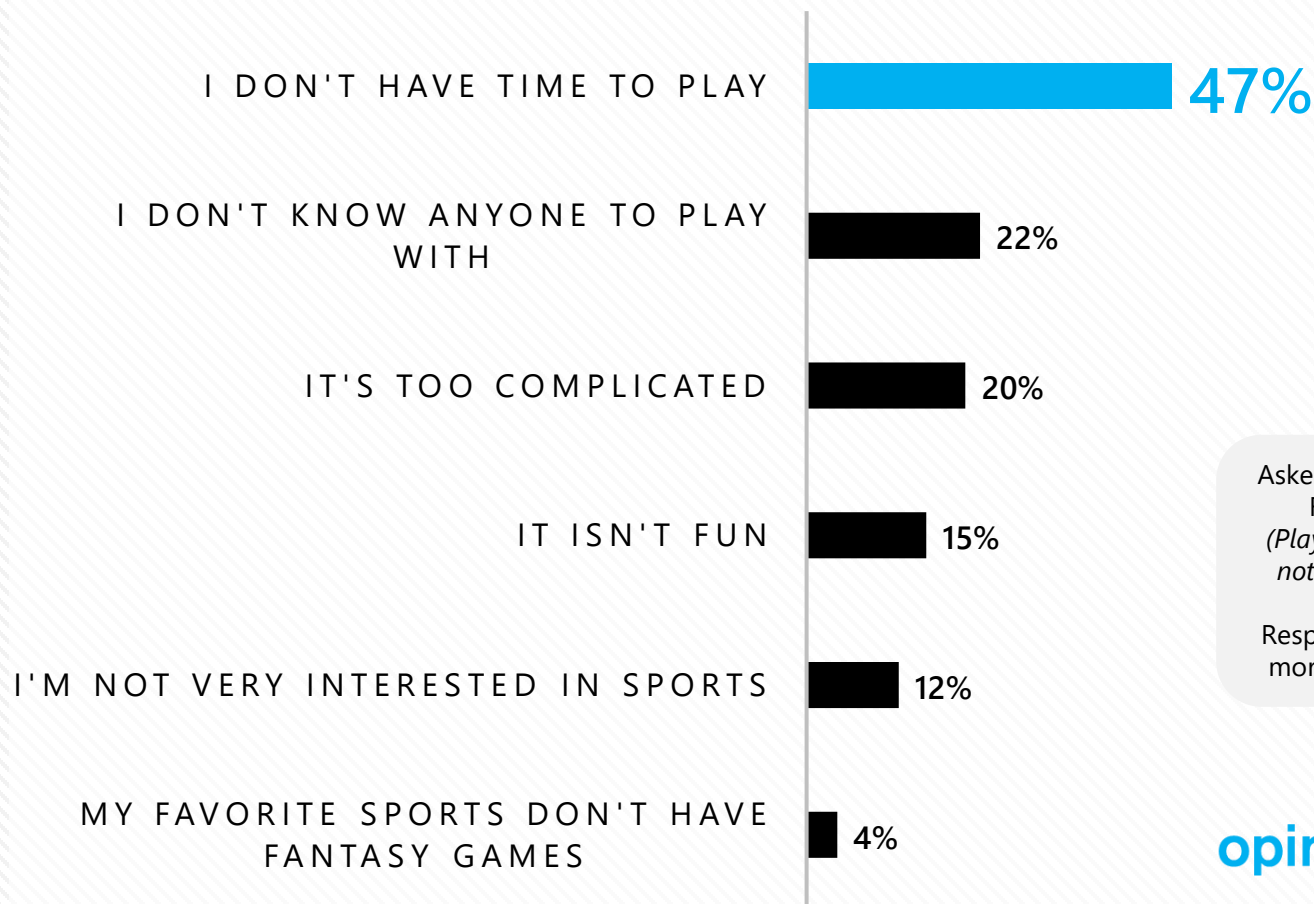


Data was collected during August 2022 on the SSRS Omnibus, a nationally representative web sample of N=1006 Americans age 18+.



“Not enough time”
is the top excuse for LAPSED fantasy players, but lack of competitors and complexity are also factors.

WHICH OF THE FOLLOWING ARE REASONS THAT YOU NO LONGER PLAY FANTASY SPORTS?



Asked of N=130 Lapsed Fantasy Players
(Played fantasy but did not play in past year)

Respondents can name more than one reason

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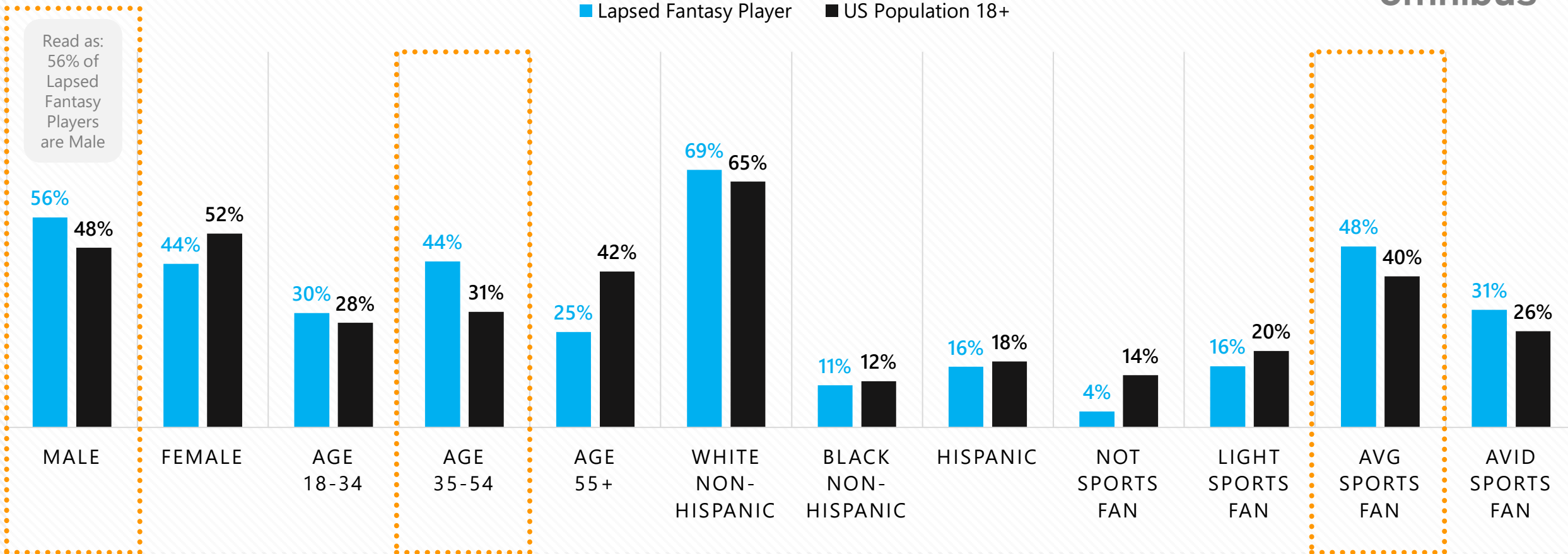
Data was collected during August 2022 on the SSRS Omnibus, a nationally representative web sample of N=1006 Americans age 18+.

Lapsed fantasy players are more likely to be male, 35-54, and Average or AVID sports fans than the US Population.

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DEMOGRAPHIC COMPOSITION OF LAPSED FANTASY PLAYERS

■ Lapsed Fantasy Player ■ US Population 18+

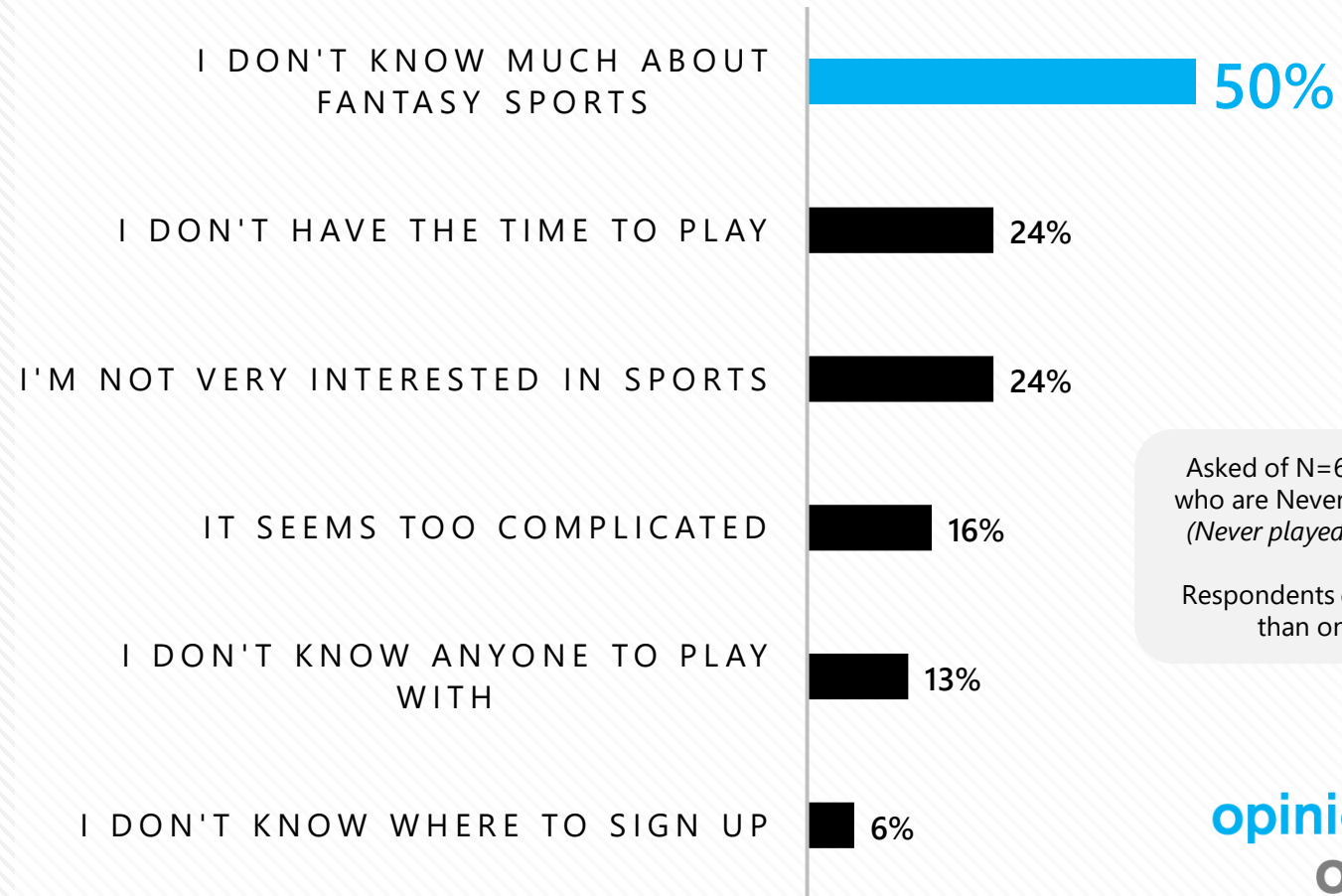


Data was collected during August 2022 on the SSRS Omnibus, a nationally representative web sample of N=1006 Americans age 18+ (N=130 Lapsed Fantasy Players).



Among sports fans who have NEVER PLAYED fantasy sports, **lack of knowledge** is the top factor.

WHICH OF THE FOLLOWING ARE REASONS YOU HAVEN'T PLAYED FANTASY SPORTS?



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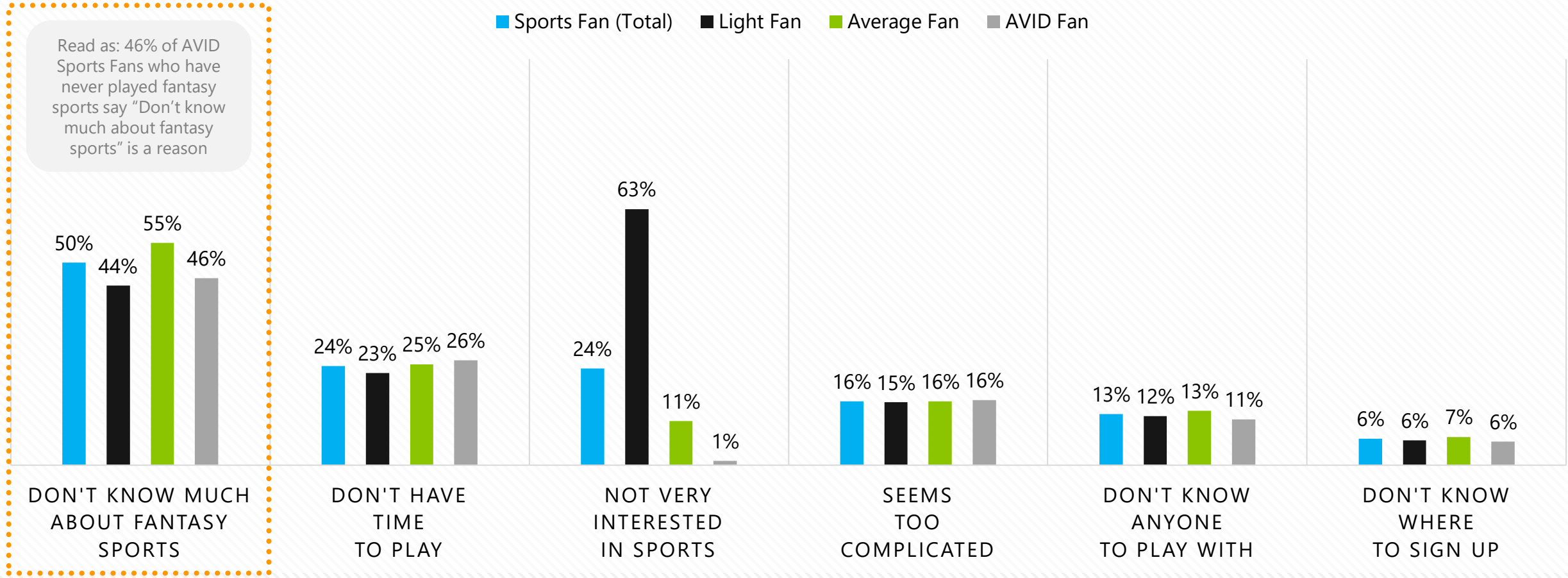


Lack of fantasy knowledge is an obstacle to non-players at all levels of sports fandom.

REASONS WHY YOU HAVE NEVER PLAYED FANTASY SPORTS

■ Sports Fan (Total) ■ Light Fan ■ Average Fan ■ AVID Fan

Read as: 46% of AVID Sports Fans who have never played fantasy sports say "Don't know much about fantasy sports" is a reason



Data above was collected from the SSRS/Luker On Trends Sports Poll, Jan – Jul 2022, Americans 12+. Respondents can name more than one reason.



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WANT MORE INFORMATION

ON FANTASY SPORTS PLAYERS?

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Interviews for this study were conducted on the SSRS Opinion Panel Omnibus from August 19 – 22, 2022 among a nationally representative sample of 1,006 respondents age 18 and older. The margin of error for total respondents is +/-3.5 percentage points at the 95% confidence level. The design effect is 1.3 The SSRS Opinion Panel Omnibus is a multi-client, probability-based survey that fields twice a month. It delivers a nationally representative sample of 1,000 adults age 18 or older in English (with Spanish language option). Data collection is conducted online and via phone (for non-internet and web reluctant respondents) using the probability based SSRS Opinion Panel. Learn more at <https://ssrs.com/ssrs-omnibus-survey/>.

Data collection was also conducted on the SSRS/LoT Sports Poll from January – July 2022, among a nationally representative sample of 13,023 Americans age 12 and older. More than 500,000 Americans have been interviewed over 25 years. Surveys are conducted 12 months a year (approximately 350 days) in both English and Spanish. Around 1,500 interviews are collected each month, totaling around 18,000 interviews per year. Learn more at <https://ssrs.com/ssrs-luker-on-trends-sports-poll/>.