A Whole New Ball Game? An International Comparison of Fantasy Sport Usage and Outcomes

Adam Karg, Deakin University
Brendan Dwyer, Virginia Commonwealth University
Heath McDonald, Swinburne University of Technology

Marketing

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Fantasy sport (FS) has developed into a wildly popular, complementary activity to more traditional forms of sport consumption. Its growth and use as a marketing tool has been explored in past literature, with FS evolving into an important dimension in the engagement of sport consumers. As such, it has played a key role in the advent of the media dominant consumer (Pritchard & Funk, 2006) and the "emergence of an increasingly empowered sports fan" (Roy & Goss, 2007, p. 104).

Previous work in the area has centered on the ways consumers undertake FS and its impact on other forms of sport consumption as well as FS play and its alignment to motivational and socially-focused factors (e.g., Duncan & Davis, 2006; Dwyer & Kim, 2011; Farquhar & Meeds, 2007). Drayer, Shapiro, Dwyer, Morse, and White (2010) found FS play increased consumer's attraction to players and resulted in increased media and statistical consumption as well as increased league knowledge in general. Other subsequent work has shown FS participants to be greater consumers of the sport than non-participants with regard to mediated and associated forms of consumption (Dwyer & Drayer, 2010; Karg & McDonald, in press; Nesbit & King, 2010).

Given that FS has become an important means of engaging sport consumers across countries and sports, the aim of this research was to advance embryonic work in the field. Specifically, it sought to understand, compare, and contrast FS participation and governing competitions in the differentiated markets of the US and Australia (AUS). The areas explored included playing patterns (i.e., profiles), opportunity costs of time spent playing, and mediated sport consumption (Calder & Malthouse, 2004). Additionally, well-researched attitudinal and behavioral elements of consumption (Fink, Trail & Anderson, 2002) and loyalty to the sport and one's favorite team (Bauer, Stokburger-Sauer & Exler, 2008) were included.

Such insight into the differences between these two markets was deemed important given the immense popularity of the activity, the overall lack of knowledge in the area, and the need to better understand what drives these highly-coveted demographics to consume and at what expense. Such learning, particularly in a cross-cultural context, provides further insight into the contextual application of several theoretical consumer behavior concepts, FS provider best practices, and ultimately, value-added possibilities for vested organizations.

To analyze the two markets, data was collected from comparable samples of FS participants in the US and AUS. Respondents comprised individuals who played in virtual competitions aligned with the major football competition in each country, with samples provided from sport organizations and trade associations aligned with the major competitions. The survey tool was developed in consultation with researchers from both markets. Wording, response items, and scales were consistent across the two collections. The surveys were distributed by email, with a two to four week data collection period.

The data collections took place at identical points in the respective seasons. The US sample based on National Football League (NFL) FS players (n=261) had a response rate of 22% while the AUS sample based of the Australian Football League (AFL) FS players (n=379) had a response rate of 28%. Respondents were 95% and 91% male in the respective US and AUS data collections and had comparable age and income characteristics. Exploratory analysis for this paper was limited to descriptive statistics and cross tabulations using SPSS v17.0. Chi square tests and ANOVA's were used to test for significant differences between groups.

In line with past work, FS participants were avid consumers of sport, reporting highly-developed attitudes and behaviors regarding consumption and fandom. However, the nature of sport consumption across the two markets
was slightly different with the AUS market showing a greater tendency to follow their own team in consumption activities. When assessing attitudes and behaviors around consumption, the US sample showed more centralization towards the overall league. The AUS market also revealed a significantly higher overall tendency to gamble in addition to FS. Interestingly, it was much more common for US participants to pay entry fees to play (with greater value of prizes); hence, this may suggest FS in the US represents a substitute to other forms of sport gambling, and certainly appears to be a more direct revenue generator for providers rather than a promotional or complementary activity to traditional forms of league fandom.

Some significant differences were also found in the nature of the competitions and their organization. Most prominently, FS appears to be much more of an established activity in the US with leagues in place for many decades. In AUS, the activity has only been in the mainstream for the last decade. In addition, the depth of the US market also appeared much stronger, with US participants managing more teams than their AUS counterparts, and reporting much high volumes of time spent managing their teams. For example, more than 90% of the US sample reported spending two hours or more per week playing the games, with just over half of the AUS sample (53%) spending the equivalent time. The opportunity costs, however, were shown to be identical across markets, with time spent playing FS mainly undertaken at the expense of other online activities and working/studying in both markets. In the US, FS was also seen to be a more insular activity, with a higher percentage playing with family and friends. In AUS, the likelihood of playing with work mates or random strangers was much greater.

Consumers in both markets reported FS impacted cognitive and behavioral elements that represent important measures for sport organizations. The virtual sport consumption outputs of both markets aligned identically with past work suggesting increased media consumption was the major self-reported impact of playing FS (Drayer et al., 2010; Dwyer & Drayer, 2010; Nesbit & King, 2010). Given participation was more dominant for US players, results showed the influence of FS on their consumption was likewise more notable with higher self-reported impacts for the US sample across all measures.

In line with work on motives, FS players recognized a range of experiences from their FS play (Dwyer & Kim, 2011; Farquhar & Meeds, 2007). These items were based on components of media consumption and included educational, entertainment, routine/escape, and social outcomes. In line with greater depth of play in our US sample, the reported experiences were greater for US players than the AUS market.

Summarily, this study identified several unique and influential similarities and differences in both FS markets including team and league-focused fandom, opportunity costs, motives, and consumption outcomes. This presentation will comprehensively cover the results, as well as develop a much needed discussion on the future of FS research. For example, several possibilities for focused inquiry became evident through this investigation such as examinations into gambling associations and team fandom costs in the US and the lack of personal stake and a lower social connection component in AUS. Lastly, given the seemingly identical demographics of both samples, study of the potential barriers to FS participation is needed.