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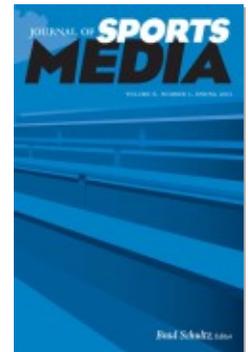
New Media, New Audiences, and New Questions: Exploring a
Communication Research Agenda for Fantasy Sports

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New Media, New Audiences, and New Questions

Exploring a Communication Research Agenda for Fantasy Sports

STEVEN G. HILL AND CHANG WAN WOO

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Despite the popularity of fantasy sports, scholarly exploration of the topic has been rare. This study explores a communication-oriented research agenda in that area, using a qualitative analysis of data from in-depth interviews with U.S. fantasy-sports industry leaders. In addition to extending the limited body of literature on fantasy sports, the analysis revealed potentially fruitful research topics, including consumer motivations to use fantasy sports products, information and services; perceptions of gambling; content quality of fantasy sports information; and others.

Introduction

Even as daily newspaper circulation declined to an estimated 48.4 million in 2008 (“Project for,” 2009) a key group of those who consume information from newspapers and other media continued its steady growth. Some 27 million Americans now play fantasy sports—an Internet-fueled upswing from an estimated 2 million in 2000 (Ankeny, 2009) and part of an industry worth more than \$1 billion and perhaps up to \$5 billion or more (Greenburg, 2009). Of that amount, as much as \$150 million in potential fantasy league winnings may have shifted because of single injury to New England Patriots quarterback Tom Brady (Ankeny, 2009), indicating the high stakes involved in what many would consider, personal injuries aside, a relatively trivial set of affairs.

Although fantasy sports are a social phenomenon associated

primarily with the United States, their potential for global growth and influence also has been noted (Ankeny, 2009; Boyle, 2005; Futterman, 2008; Hutchins, Rowe & Ruddock, 2009; “UK web users,” 2008). While the 2009 Super Bowl drew 98.7 million viewers, soccer’s 2006 World Cup championship match between France and Italy drew six times that much and the entire tournament attracted a cumulative television audience estimated at 26.3 billion (Ankeny, 2009). Despite the inability of fantasy providers to develop products to reach that particular audience, it is one that our research shows is still a coveted one, as we will discuss later.

Even within the established U.S. market, fantasy players are a critical audience about whom we know little; at the 2010 Broadcast Education Association research symposium, which focused on sports and media issues, keynote speaker Walter Gantz (2010) included research on fantasy issues as one of the top 10 priorities for sports-related media research—the only specific audience of sport fans he mentioned outside of various age groups of men or sports fans in general. At the same symposium, the executive vice president for ESPN’s integrated media research arm, in listing his unit’s top 10 research findings, also mentioned only one specific set of sports fans: fantasy players (Enoch, 2010). Those participants, he noted, are the heaviest users of media across platforms and a critical group for understanding media usage among consumers of information through television, radio, print, the Internet and mobile devices.

Purpose of the Study

Despite widespread participation by Americans and potential for even more dramatic growth worldwide, the fantasy-sports phenomenon has received scant attention from communication scholars or other academic researchers. The purpose of this paper was to begin exploring a research agenda in communication, using a review of the extant literature and a qualitative analysis

of data from a set of in-depth interviews with business leaders in the U.S. fantasy-sports industry. Because the scholarly literature on fantasy sport is literally too undeveloped to have suggested more than a very few limited directions for further research, we believe such exploratory research is a useful step. Furthermore, we suggest that a general qualitative approach, interviewing those most familiar with fantasy sport to examine their opinions on potential research, can be taken at face value as being useful.

We begin our study by defining fantasy sports, giving a snapshot of the industry and reviewing scholarly literature relevant to this study. We then review our interviews with industry leaders and suggest possible research topics and sample studies. By “industry,” we mean those businesses whose primary focus is provision of fantasy games and game-related services, including statistics and information—those whose business and profits are based in fantasy sports. This could include those working for mainstream media corporations (such as CBS) but whose focus is strictly fantasy products and services. It would not include those who are more traditional media with a broad mission or reporters in those media who cover fantasy sports as part of a journalistic beat.

Literature review

Definition

For purposes of this article, we define “fantasy sports” generally as competitions involving individuals who select “teams” of players from a pool of real-world athletes in various sports. These individuals then participate in contests ultimately decided by aggregated statistics that reflect actual performances by their chosen players. These contests are most popular in the context of the National Football League and Major League Baseball in the United States, but competitions can include performers from

a wide variety of sports, including college football, hockey, automobile racing and fishing. Although only two of the limited number of scholarly articles and papers we found related to fantasy sports specifically addressed a definition of fantasy sports, the working definition above would appear to fit within the general understanding of what fantasy sports are for scholarly research purposes. Shipman (2006) and Hiltner and Walker (1996) may have come closest to concise definitions by describing fantasy sports in these ways:

. . . the fantasy coach selects players from the real-life sporting world to be part of their team. Then, every week, the fantasy coach gets points for the performance of the players on their team. (Shipman, 2006, p. 1)

These highly interactive games involve the assembly of players from existing sports teams onto fantasy teams that are managed or coached by the fan. Leagues are formed with multiple teams and games are played using statistics from actual sports contests. (Hiltner & Walker, 2006, p. 103)

Even so, the Shipman definition, which appeared to focus on football¹ because of its inclusion of the term “every week” to describe contests, seems neither broad enough nor sufficiently concise to describe the realm of fantasy sports. The Hiltner and Walker definition is quite useful but includes the notion of leagues, which are not necessary for some competitions. However, in the other scholarly work we examined (Bernhard & Eade, 2005; Davis & Duncan, 2006; Hiltner & Walker, 1996; Lomax, 2006; Oates, 2009; Randle & Nyland, 2008; Roy & Goss, 2007; Wirakartakusumah, 2002), we found common elements of individuals selecting their own players for imaginary teams, a pool of real-world athletes who compete in various sports, and periodic competitions among individual fantasy participants based on statistical performances of those real-world athletes. These elements allowed us to develop our working definition. It is important to note that, although prizes (including money) are part

of many fantasy games, many others do not necessarily involve winnings; ESPN, CBS, Yahoo!, Fox, and the major U.S. sports leagues, among others, offer popular free games that require no expenditures. Fantasy players, in fact, listed winning prizes and money as only their fifth-most frequent reason for playing fantasy sports, after fun, competition, the presence of significant others in leagues, or making game-watching more interesting (Walker & Lee, 2007).

Economic impact and early studies

In addition to being explored in the scholarly works noted above, the history, economic impact and growth potential of fantasy sport have been well-documented in more popular media and will not be detailed here. Just a few salient points are worth noting before we review the more limited scholarly literature on the subject.

The economic impact of fantasy sports is somewhat unclear, partly because it is complicated by such things as advertising expenditures, betting sums and other outlays, but the impact may total \$5 billion (Greenburg, 2009). The Fantasy Sports Trade Association, which conducts surveys through a national research firm, gives a more conservative estimate:

Now an estimated 27 million American adults play fantasy sports, translating to annual revenue between \$800 million and \$1 billion, according to the Fantasy Sports Trade Association, an industry organization that represents more than 110 companies. About 85 percent of gamers play fantasy football, and 40 percent participate in fantasy baseball. The average player is male, between the ages of 18 and 49 and boasts above-average income and education levels—in other words, a marketer’s dream. (Ankeny, 2009)

The association’s research also shows that the average household income of the estimated 30 million U.S. and Canadian fan-

tasy players was \$94,000 in 2008 (Fisher, 2008). Fantasy sports players also have high levels of brand recall, likelihood to click on online ads, and positive attitudes toward online advertisers (Walker & Lee, 2007). The presence of such large media corporations as CBS, ESPN, Yahoo! and others has helped spur the dramatic growth of the industry (Evans, 2007).

Because fantasy sports generally (but not always) occur in Internet-mediated platforms, virtually any scholarly study focused on fantasy sport should have some communication implications. However, given the paucity of literature found in major databases, it can be safely concluded that relatively little scholarly communication research in the area has been done. During our review, we found only 10 peer-reviewed journal articles, papers from scholarly conferences or other scholarly works that had fantasy sports as a primary focus and clear implications for communication research (for this study, we used EBSCO SPORT Discus, Proquest ABI/INFORM Complete, EBSCO Academic Search Premier, Lexis-Nexis Academic Universe, EBSCO Business Source Premier, EBSCO Communication and Mass Media, Wilson OmniFile FT Mega, SAGE Journals Online, ISI Social Sciences Citation Index, Wilson Social Sciences Full Text, EBSCO Education Research Complete, and Wilson Education Full Text to search the literature). It is almost certain that other conference papers exist, but remain unlisted in major databases; while we acknowledge this likelihood, it is clear that classifying extant research as very limited is an accurate description.

One of the earliest scholarly studies of fantasy sport was conducted by Hiltner and Walker (1996), who examined electronic bulletin-board messages from members of a fantasy baseball league following a technical breakdown of their league's game system. The authors analyzed the rhetoric of participants and grouped them according to themes the authors analyzed in the messages, concluding that participants were able to form a somewhat conservative, communal consensus for participating in discussion about the breakdown while managing their frustration

despite the limitations of the communication medium. No further research ideas were suggested. Another early study was a master's thesis at the University of Wisconsin-La Crosse (Wirakartakusumah, 2002), which concluded that fantasy sports profits were attainable for media sites, but that adequate business strategies would need to be developed for such profits to materialize.

The most common unifying theme in the very limited range of fantasy research appears to be a concern with fantasy sports communicating messages related to maleness and masculinity. Bernhard and Eade (2005) attempted to "map the landscape of the burgeoning fantasy sports gaming phenomenon" (p. 40), albeit from a perspective of fantasy sport as gambling. They concluded that play was "healthy and salutary recreation" (p. 40) and not deviant in terms of its sheer popularity and growth; they also suggested further study into the relationship of fantasy sport to male social activity and masculinity. Davis and Duncan (2006), in a more critical study, did delve into the role of fantasy sports as a contributor to affirmation of perceived masculine and white privilege through fantasy participation, especially in terms of gathering of sports knowledge; the researchers concluded that the rise of fantasy sports coincided with more general "white male backlash politics" (p. 262). Similarly, Oates (2009) posited that the vicarious management of fantasy sports players allows businesses to integrate and expand their reach while helping maintain a racialized androcentrism.

The last half-decade: Research branches out

In more recent years, researchers began to find new directions, but not frequently enough to find common theoretical or methodological threads. Like those studying gender, Shipman (2006) also found empowerment to be an important theme in rhetoric related to the advertising of fantasy sports, but focused on elements of control, participation and competition as potential components of more engaging and immersive forms of enter-

tainment for both future game developers and for sports leagues considering the impact of fantasy sports on their own games.

Randle and Nyland (2008) found participation in interactive fantasy sports leagues was significantly related to an increase in traditional television, newspaper, and radio use. During their 2006 survey of participants, they anticipated and perhaps perceived concurrent industry changes. By the time of their publication's study, in which they suggested that mass media managers should consider implementing web-based interactive fantasy sports leagues to build customer loyalty and increase use of traditional media properties, media managers were doing just that.

Roy and Goss (2007) conceptualized a framework of influences on fantasy consumption and concluded that the viability of fantasy sports as a marketing platform is no longer in question. For marketers to successfully unlock the potential of what the researchers termed "engaged fantasy sports communities" (p. 105) they should develop both more online and offline products and services that meet user needs, including those that offer "incentives, encouragement and acceptance" (p. 106) to such audiences as women, as well as those that create and disseminate more meaningful statistical information.

Nesbit and King (2010) used survey research and economic modeling to conclude that fantasy sports participants were actually more likely than nonparticipants to attend National Football League games. The researchers suggested that the NFL might consider how fantasy would increase fan loyalty to the league, especially with the threat of economic difficulties that could affect ticket demand, which the authors characterized as a luxury service. Similarly, Drayer et al. (2010) found fantasy participants used the Internet, television, cellular telephones, and a variety of print media at much higher levels than nonparticipants and experienced positive effects on their attitudes toward the NFL as a whole and individual players not part of their favorite teams, but who were on their fantasy teams. Based on findings from an interview-based qualitative research method similar to ours, the researchers suggested several sponsorship categories and in-

dustries that might align themselves more closely with fantasy football, as well as research possibilities based on quantitative methods focused on consumption patterns, television viewership and psychological commitment, and motivational factors.

A final scholarly work, which included implications for communication research was done by Lomax (2006). Written as a review of fantasy sports for a handbook dedicated to media coverage of sport, the piece suggested a research agenda largely focused on potential improvements in statistical evaluation of games and players. The chapter also included, however, a set of potential research questions dealing with satisfaction of participants regarding products and services based on user needs and wants, as well as questions dealing with the best methods for communicating fantasy information, questions on public perceptions of fantasy sports, and the place of fantasy sports in educational curricula. All of these suggestions were reflected in the comments of respondents in our study.

Our literature review confirms the need for exploratory research to help develop scholarly research topics that supplement the body of knowledge over a relatively new but already well-established sports/entertainment industry. Such knowledge would also benefit the fantasy sports industry. We therefore posit these research questions:

- RQ₁: What research topics do fantasy sports industry leaders feel could be developed by communication scholars?
- RQ₂: What kind of communication studies can be done to benefit both sports communication studies and a fantasy sports industry?

Method

We conducted a series of in-depth telephone interviews with leaders in the fantasy sports industry from October through December 2009. Initial respondents came from a list of contacts

given to us by another leader in the field, a colleague who was not interviewed for this study. To gain other potential contacts, a snowball technique was used whereby leaders who agreed to be interviewed were asked for additional suggested contacts. From a list of 22 leaders eventually contacted, we were able to obtain phone interviews with 13 respondents. Respondents were all males who had been in the industry for at least a decade, with some involved for almost three decades; we received only one contact name for a female, but she was unable to participate in an interview. Although we believe it important to consider how female audiences are served, we did not consider the lack of female respondents a critical weakness of the study, as six of our 13 sources did discuss need for research related to women, as we explore later. Many interviewees had served in leadership roles in industry associations, and several had started their own businesses—some of which had been bought by larger organizations as the industry grew. All but three worked full-time in the fantasy industry.

The interview protocol included six basic questions about the industry and its research needs, as well as questions regarding the respondent's background and a request for any additional contacts. Questions were kept as simple and open-ended as possible to encourage openness and to avoid guiding the discussion. Occasionally, clarification was needed by respondents, some of whom noted that the questions were very broad—particularly for question 3, which was intended to allow respondents to give their thoughts on relative importance of such factors as the quality of writing, quality of presentation and quantity of fantasy information presented. Questions were:

1. What are the key questions to which you need answers regarding consumers of fantasy sports products, information and services?
2. Is there any research your organization is doing that you're comfortable talking about?

3. What do you believe are the most important attributes of fantasy information and services for different audiences?
4. What directions do you see provision of fantasy football information, products or services going in the near future?
5. What audiences of fantasy players are not being served well by the industry?
6. What other issues are facing the industry as it matures?

Respondents were promised anonymity and told interviews were expected to last in the 20- to 30-minute range. The shortest interview lasted 14 minutes and the longest lasted 48 minutes, with an average length of 24 minutes. With respondent permission, interviews were recorded on an Olympus LS-10 digital recorder and speakerphone. Digital files of the interviews were then transcribed by one of the researchers and by a paid student assistant.

Transcripts were then imported to NVivo 7 (“QSR”, 2008) qualitative-data analysis software. To analyze the data, we used techniques derived from software-assisted rhetorical analysis, an approach used by some rhetorical scholars who wish to systematize their work with qualitative data. One advantage to this approach is that it allows quick analysis of recurring themes; while the sheer number of occurrences of a theme is not by itself an indicator of relative rhetorical weight given to some issue, it is one clue to the importance of a particular theme to a set of respondents (among such factors as context, word choice, emphasis, depth of detail, and others). Rhetorical analysis is often used to identify larger questions for further research; according to Bowers (1968), a principal task of the critic is to aid in formulation of hypotheses and help define key research terms. Although rhetorical analyses are often much more complex than our current analysis, we kept these principles in mind as we designed and conducted our study.

A single coder analyzed the transcripts, using initial coding

to identify a broad range of themes. A second coding pass confirmed original coding and allowed recoding and recategorization as necessary. Coded references in the transcripts were then rearranged hierarchically to provide connections and identify relationships among references (Bazely, 2007). These are variations in the standard techniques of constant comparison (Lindlof, 1995) that occur throughout qualitative analysis of data until a point of theoretical saturation is reached. Themes could be coded in more than one category. After the final coding pass, we analyzed resulting themes, using close analysis of the type described by Strauss and Corbin (1998) to construct our interpretation of the key themes for potential research.

Generally speaking, the basic nature of our questions allowed for quick categorization of respondent comments and fairly obvious groupings of themes. After the coding passes and comparison of initial codes (or themes) were completed, the coded textual references were grouped into four broader categories: thoughts on the state of industry research; audiences; products, services and information; and issues facing the industry. Each of these categories contained sets of recurring themes, equivalent to codes or subcategories. For purposes of our discussion, all “codes” equate to themes, and we refer to themes and the broader categories they fall under as separate entities. Textual references from interview transcripts could be coded under multiple themes and therefore be found in more than one category, as text was coded at either the sentence or paragraph level, depending on the textual reference’s context. For this reason, among others, the relative number of references in a given theme or category is not as important as the overall weight of a theme given all other factors. As in rhetorical analysis, this qualitative analysis relies on the judgment of the analyst, who like other scientists conducts investigative and exploratory work with the purpose of understanding and evaluating a subject (Black, 1978).

Results

Our interviews provided fruitful information for answering both research questions. On the whole, interviewees felt that research conducted on behalf of two trade associations in particular—the Fantasy Sports Trade Association and the Fantasy Sports Association—had produced a valuable set of demographic and consumer-spending information for the industry. Several respondents initially indicated that little of pressing importance came to mind; one industry leader said of research questions about fantasy sports, “I think they’ve been pretty well covered. I’m trying to think of a really burning question. . . . I don’t think there’s that much unexplored territory.”

However, as each interview progressed, all respondents gave insight into potential research topics. For instance, the interviewee who said questions had been “pretty well covered” mentioned the need for innovation in the industry a number of times—and, despite saying that there was little unexplored territory, he later mentioned that the use of social media (such as Facebook) in fantasy sports is “uncharted territory” with a need for new business models to take advantage of what is known about the popularity of social media. Further analysis of transcripts revealed a number of potential topics of interest in the areas of audience research, products and service development or provision, and the impact of issues facing the industry.

Audience Issues: Consumption of Information and Services

Although industry leaders felt they had a good understanding of their audiences, there were still numerous questions related to why existing or potential audiences make the consumption choices they do. Many of the questions had to do with user responses to standard products and services, including those that the respondents’ businesses offered. Most indicated that besides research commissioned by trade associations, they had only in-

ternal user statistics or unsystematic feedback mechanisms by which they could gauge user responses:

Well, the only kind of research we've done is we offer a prize, and in a different kind of game we don't offer a prize, and see how the response shifts . . . see what kind of feedback there is . . . but it's not something we've done scientifically at all.

One respondent mentioned that his organization informally monitored user discussion forums to determine whether its service or game features are lacking:

Sometimes we know we've messed up something so we'll take a look just to see what kind of feedback that's getting. Or if we roll out a new feature we'll take a look to see what kind of feedback that feature is getting. And then just generally throughout we'll kind of keep an eye on it and see if there's any useful feedback or trends.

The same respondent noted that such feedback was more valuable to his business than more direct customer-service feedback. He also noted that for a list of more than four dozen features that his company offered in various games and services, the company based its sense of the features' success or failure based on user statistics and informal feedback, which were then used to decide whether to add or drop a feature. Such features as having live drafts or not, ability to customize playoffs or ability to customize schedules were among those the company considered as part of the mix of consumer needs and preferences.

Among the primary questions about fantasy players were these which came up multiple times in interviews or were given more weight by respondents as being important:

- Why do users stay engaged with particular games or services? Is it because of features of games or services, other motivating factors, or a combination?

- What motivations or mix of motivations draw specific audiences to games or services? (Factors often noted were opportunities for social interaction, chances to demonstrate one's sports knowledge, the opportunity to win prizes or money, entertainment, competition and the opportunity to "talk smack" to friends and colleagues, and engaging one's passion for sport.)
- Why do some users still prefer print products, such as magazines, when information and services are so widely available online?
- How important is the time commitment needed for various games and services, and how would engagement of some players or potential players be increased through offering of shorter-term games, such as weekly football contests instead of season-long leagues?
- What factors encourage players to move from free leagues and services to pay or "premium" services?

In addition, respondents had a number of concerns with non-players or underserved audiences—many of which have more obvious communication relevance. Among the most important questions were how to increase exposure to fantasy sports or to engage non-players. Despite the absence of women among our respondents, women were one of two primary audiences most frequently mentioned as underserved. The other was youth, with some speculation that relatively simple games would be a good way to draw younger players in, as well as continued development of fantasy-based educational programs like those occasionally used in school mathematics (Flockhart, 2009) or other educational programs (Waelchli, 2008). Women were the more difficult audience for respondents to gauge, as some suggested that women's interests might just not coincide with men's while others felt that engaging more women might be a matter of emphasizing different benefits:

A lot more women play now, whether it be to compete with their significant other or to just have something to do together on Sunday. I mean, so many times we hear about the fantasy widows, so to speak, where their wife or girlfriend doesn't get a chance to be with them on Sundays because they're glued to the TV and the computer, but a lot of females are starting to play the game and enjoy it . . .

Even more than those two groups of potential players, international audiences—particularly soccer fans—are highly coveted as possible fantasy consumers. Half of respondents mentioned soccer fans, as well as fans of cricket and other sports with international appeal (such as auto racing), as targets for fantasy products and services.

One respondent said much industry research shows that once potential players are exposed to games, they often like them and begin playing, but that achieving exposure is not so simple:

But part of it also is that they're just kind of completely oblivious . . . and part of it is more difficult than just finding out who doesn't know about it and getting it to them.

While some non-players may obviously just lack the interest, the matter of getting them to try games for which they have little interest could also have to do with perceptions such as those equating fantasy sports with gambling—a matter discussed in our final portion of the results section.

Integrating Products, Services and Information

As noted, interviewees tended to be both aware of industry-wide research and its value in describing fantasy's customer base. Perhaps because industry leaders were fairly confident in that research, their responses about research needs tended to focus on offering newer, better products and services that respond to a quickly changing marketplace. Four general areas of interest

were gauging accuracy and quality of information, effects of presentation quality on consumer behavior, increasing the variety of games, and taking advantage of new media platforms and social networking.

Three themes stood out above others in terms of total references to the themes. Those were quality of written content, quality of information, and variety of games, each with more than two dozen textual references. The “quality of written content” theme was likely impacted by prompting from the interviewer, as discussion tended to result from elaboration on the general question regarding important characteristics of fantasy information and services. Respondent thoughts on the quality of written content did still provide interesting directions for potential research questions, however, as a majority of interviewees did have at least some concern about the quality of written information on Web sites and in publications. In general, though, respondents felt it was not as important as other questions. One interviewee who had served as a judge in an industry contest said:

. . . quite honestly, I was embarrassed by some of them. They were poorly written, by and large . . . I'm concerned about it. But the truth of the matter is, unfortunately, that today's consumer, especially in fantasy sports, is more interested in the results, plus some value added to the service. It's less so in the reading and quality of a well written piece of journalism.

An interesting comment was provided by a respondent who said that when it comes to overall presentation quality, the quality of writing was low on his company's list of priorities:

. . . The funny thing is the quality of writing is probably our last one . . . I make spelling mistakes all the time. We go back and correct them, but we rarely ever get anybody saying, "Hey, your writing sucks." It's always, "Hey, great stuff. Thanks for providing the information." In-

formation is key. I'm sure some people get turned off by poor grammar and sites that do that, but they seem to be more concerned about getting the information than how it's written.

Of greater importance to most respondents was the overall quality of the information itself: accuracy, statistical interpretation, timeliness and usefulness of information to users—especially the sheer quantity of information. Representative comments include these:

So we always focus on backing up predictions with sound analysis and a rationale . . . Readers are savvy enough to understand that most people in the industry have no inside contacts . . . Rather, they're taking time to grind up a lot of stats and weigh a lot of variables . . . If you predict a big game for Favre and it doesn't happen, but you gave five reasons it should, you're off the hook to a great degree.

Maybe some research on writers' accountability would be nice. Comparing writers and experts to each other, showing which have the best success rates, etc. I think that's some research readers would love to see—maybe not some writers.

It's player news. The information, especially on the college level, is pretty limited, and it's hard to sift through all 120 teams. So that's what we do, and I think that's our biggest draw . . . they want the information and they want it quick.

. . . the typical consumer . . . [would] rather have convenience and service. Where you have the option of getting everything . . . in one space, they'll pick quality journalism, all other things being equal. . . . Because the space is so crowded, the differentiator is not content quality, but provision of services at the lowest fee.

I think the marketplace has answered that question . . . market forces seem to have pushed us toward quantity over quality, so that there's

always something recent out there for virtually every meaningful fantasy player.

Of much more concern, then, was the basic issue of which products and services the consumer wants and possibly would be willing to pay for. For several respondents, this meant new games, especially those that would require less than an entire season's commitment and those that might even address non-sports issues but which the fantasy industry could provide:

So NASCAR is becoming bigger because it's easy. It's one weekend . . . you don't really have to pay attention until the weekend and you pick your drivers and go from there . . . it's going to be a bigger fantasy commodity as the years go by.

I think one of the biggest trends is going to be moving away from full-blown . . . leagues where you draft and start guys each week to these little weekly games.

What I am seeing is . . . I don't have any really good data to back this up, but what I call lifestyle games . . . fantasy American Idol, fantasy Grammys, fantasy Academy Awards, you know, like the office pools you'll see before the Academy Awards . . . those things are starting to emerge now, and they're almost all being run grass-roots because no or very few sites support them.

. . . fantasy Congress, fantasy American Idol, fantasy fishing, which maybe is a sport, I don't know. . . . I think you can see more of that down the road in terms of getting outside sports and applying that model to different things. . . . I've heard on more than one occasion from people that they play fantasy sports with county high school teams. Obviously they do that by hand and there are no services provided for that, and that's one example where a niche could come in.

For each of the areas of social media, mobile technology and other delivery-related mechanisms, half or more of the respon-

dents specifically mentioned at least one of the areas as being significant trends that will affect how fantasy products and services will be delivered in the future. Among their questions were these:

- How might information on consumer game decisions be aggregated and correlated with success rates in ways that would be informative and entertaining to other players?
- How might the industry take advantage of such platforms as YouTube to offer, for instance, a set of ranked consumer commentaries?
- How can the international appeal of social media be leveraged to build a larger user base—for example, Facebook, which offers ways to contact friends across continents and already has at least one online soccer game?

Industry Issues: Gambling and “Free Versus Pay”

Respondents brought up a number of business-related issues important to the industry—gathering new capital, developing new business models, further studying the relationship between services and willingness of consumers to pay, improving cooperative relationships with sports leagues, and selling its products to investors and advertisers—but the most compelling to communication researchers might be a lingering perception of fantasy sports participation as a form of gambling. Although legislation that specifically excluded fantasy sports from definition as a gambling industry passed in 2006 (Moorman, 2008), some respondents felt that potential consumers might not participate in fantasy sports because it often contains elements that appear to be consistent with gambling—specifically, entry fees and prizes:

. . . there’s a perception out there that fantasy football or fantasy baseball is kind of like gambling. I think it’s been determined pretty widely

that it is not, legally. But that perception still seems to be out there a little bit, so that's one perception that needs to be squashed even more than it has.

. . . they're going to turn into more of the games where a guy can play one week and not play the next week, and try to win some money this week . . . and you know, I don't want to use the gambling term, but more of the weekly contests than the full-blown season contests.

It's still a gray area. There are so many gray areas out there about running your own fantasy game, and is it gambling or is it not, are you crossing the line, but everybody's doing it, because that's what people want.

Nine of 13 respondents brought up the gambling issue as one important to the industry, and most understood that regardless of the legal standing of the industry, public perceptions would have a significant impact.

Of the other business-related issues, understanding the complex relationship among factors that drive consumers to either free or pay models in fantasy sport was mentioned in 32 different references by 10 of 13 respondents. Important general themes related to those models as they could influence consumer behavior were noted in the two previous sections regarding audiences and fantasy products, services and information.

Discussion and Conclusion

Overall, throughout the interviews we conducted, we found three general research topics to be prominent. The first of these is motivations of fantasy sports fans. Several interviewees expressed strong curiosity over which factors would lead more fans to participate in fantasy sports. Second was exploring important characteristics of fantasy products and services. Interviewees frequently brought up issues of game variety, information and

writing quality, information delivery and other services. Such customer-oriented issues are clearly tied to marketing and promotion and continued industry growth with in terms of new fans and new game types. A third possible topic is a misconception of fantasy sports as a form of gambling, which possibly prevents more fans from participating. If people consider fantasy sports to be gambling and if that misconception is indeed hampering the industry, research clearly should investigate its role in participation and how fans perceive and respond to communication from media, fantasy providers, leagues and others about the issue.

Because our qualitative analysis is intended to be an exploratory, we did not proceed from any particular theoretical perspective. We believe, however, that it is not difficult to address fantasy sports issues from a variety of theoretical perspectives, which also ultimately answers our second research question. For instance, agenda-setting theory, one of the most widely used of theories on media affects (Miller, 2002, p. 258), could be used as a perspective from which to examine questions relating how major media organizations also involved in fantasy sport, such as ESPN and CBS, use their broadcast programs to promote their own online fantasy games, which in turn are used to draw traffic to their various media offerings. Uses and gratifications theory (McQuail, 1983, pp. 82–83), with its focus on information, personal identity, entertainment, and integration and social interaction, can clearly be tied into questions regarding motivations of fantasy participants in their choice of games or other products and services. Uses and gratifications researchers could focus on typologies of motivation and appropriate media consumption as encouraged by Rubin (2002) for various topics; the uses and gratifications perspective has been suggested as especially appropriate where new media are emerging (Ruggiero, 2000) and this makes fantasy sports a particularly appropriate topic for research.

In his discussion of fantasy sports' role in a new sports/media research agenda, Gantz (2010) noted the potential of Wenner's

(1989) transactional model for addressing a plethora of issues resulting from expanding media options, shifting demographics and advancing technology. Whether researchers use agenda setting, uses and gratifications, the transactional model or some other approach, the variety and complexity of issues brought up by our respondents promises an equally rich set of theoretical perspectives and methodological approaches will be both appropriate and desirable.

An area of particular interest for us is the work of Zillman and Bryant (1985) on selective exposure theory or affect-dependent theory. Their contributions to investigating characteristics and motivations of sports fans and to the experimental tradition in theory development began with the fundamental assumption that enjoyment is the primary motivation for people to be exposed to entertainment content. The links become obvious between a theoretical perspective focused on enjoyment and a quickly growing fantasy-sports field concerned about the motivations of its participants. We therefore suggest some possible research topics and settings for fantasy sports based on selective exposure theory.

A Sample Research Agenda: Selective Exposure Theory and Sports Fans

Selective exposure research often has been used to determine media choice and user motivation. As early as the 1970s, Zillmann, Bryant, and Sapolsky (1979) started investigating sports fans and their use of mediated sports. Zillmann and Bryant (1985) reviewed studies of entertainment content and formulated their fundamental principle about human behavior in seeking media content. The research tradition they originated consists of experiments to determine which factors increase the level of viewer enjoyment. This type of research can help identify fantasy sports users' motivations, which some interviewees in our study suggested is necessary.

According to Bryant and Miron (2004), uses and gratification theory has been the most frequently used theory since 1959, and the core value of uses and gratification study always has been people and their motivations. However, most uses and gratification research has used questionnaires and 90 percent of the studies have been normative and descriptive (Darvin & Song, 2005).

One of the biggest concerns of Zillmann and Bryant (1985) was to supplement the fairly descriptive nature of uses and gratification study by utilizing experimental studies. Their fundamental assumption, that people tend to choose pleasurable stimuli and avoid unpleasant events, played an important role in creating various experimental settings. In the selective exposure tradition, scholars assign specific conditions to participants and observe their affective behavior rather than asking them questions about why they used certain media and categorizing answers. For example, Zillmann, Bryant, and Sapolsky (1979) revealed the dispositional mechanics of enjoyment of mediated sports games by varying the winning or losing outcomes of participants' favorite sports teams and measuring the level of enjoyment under each condition. Bryant, Comisky, and Zillmann (1977) created different conditions for the same tennis match by using different commentary emphasizing rivalry or friendship between two players; the researchers found participants most enjoyed rivalry. Since then, many scholars have followed the selective exposure tradition, trying to determine which factors in sports drove fans into certain affective states, such as enjoyment or distress (e.g., Knobloch-Westerwick, David, Eastin, Tamborini, & Greenwood, 2009; Peterson & Raney, 2008; Schweitzer, Zillmann, Weaver, & Luttrell, 1992). Knobloch-Westerwick et al. (2009) and Peterson and Raney (2008) examined how suspense influenced the level of enjoyment and found a positive correlation between them.

Because fantasy sports reflect or represent a more active fanship in new types of media, there is room for further

investigation on fantasy sports fans' characteristics. As Mahan and McDaniel (2006) noted, "Sports fans have gone digital to communities across the world equipped with the means to produce their own online content" (p. 424). Fantasy sports let fans vicariously fulfill such desires, meaning characteristics of fantasy sports fans need to be scrutinized. Exploring these characteristics could be done with a uses and gratification approach. However, the experimental nature of selective exposure studies might be more useful for investigating questions suggested by industry leaders, such as why users stay engaged with particular games or services. Is it because of features of games or services, other motivating factors, or a combination? What motivations or mix of motivations draw specific audiences to games or services?

By varying experimental conditions and focusing on the broader question of whether fans enjoy the services companies provide, many of these more specific questions could be answered. Measuring participants' enjoyment levels in certain situations—for example, assigning participants to conditions with more information-oriented fantasy sports products or more service-oriented products—might indicate whether fans seek more information or more experiences with cutting-edge service features. Selective exposure studies, then, can disclose what factors in fantasy sports products increase the level of enjoyment. Is it good writing? Is it good information? Is it competition itself? Or is it the interface, such as interactivity, tools to share information, and so on?

In addition, researchers could compare levels of enjoyment among sports fans who compete in fantasy as well as non-participants during actual games, which would also give useful insights into how much fantasy sports influence fan enjoyment of televised games. This kind of research can be varied in so many ways that it promises multiple insights on fantasy sports and its fans. It would be valuable to practitioners in fantasy sports industry, because it gives an opportunity to test the

effectiveness of their services rather than gathering normative and descriptive questionnaire answers from participants.

The scarcity of scholarly literature on sports and the strong association of fantasy sports with new media and new media platforms means virtually all of the potential research questions identified in our results section are good candidates for more focused scholarly communication projects. These are no more than a few of the possible topics in this rich subject area. Our study was somewhat limited by the lack of gender diversity and perhaps ethnic diversity among our subjects, but this may reflect in large part the nature of a relatively new field; future studies certainly should include examination of the roles of gender and ethnicity in both issues identified above and others that researchers may uncover. However, given the likely continued growth of the fantasy sports industry and use of new media, the richness of communication theory and the number of issues identified by leaders of the industry in this study, we believe the future of this area of scholarly research has similar growth potential.

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Note

1. For purposes of this paper, we use the term “football” to refer to American football and “soccer” to refer to the game more widely known internationally as “football.”

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