



## PUBLIC POLL FINDINGS AND METHODOLOGY

### Ipsos What the Future: Play Survey

#### Topline Findings

**New York, January 10, 2023** – *These are the findings of an Ipsos poll conducted between November 14 – 15, 2022, for the [What the Future: Play issue](#). For this survey, a sample of 1,115 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.6 percentage points for all respondents.*

**For full results, please refer to the following annotated questionnaire:**

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**GAME CHANGERS**





## PUBLIC POLL FINDINGS AND METHODOLOGY

### Full Annotated Questionnaire

1. Which of the following describes your working situation? Please indicate below how you participate in sports or leisure games. Select all that apply.

	<b>Total (N=1,115)</b>
Wear clothing for your favorite team or athlete	47%
Attend sporting events in person	41%
Shop for sports gear or equipment	23%
Shop for gaming products and services	21%
Collect memorabilia/collectibles	20%
Play fantasy sports	16%
Other	5%
None of these	30%

2. Which of following, if any, do you practice or play in a normal month? Select all that apply.

	<b>Total</b>
Puzzles and mind games (e.g., Wordle, crossword, sudoku)	46%
App/mobile games (e.g., Animal Crossing: Pocket Camp, Candy Crush)	42%
Tabletop/board games (e.g., chess, Monopoly, Scrabble, Uno)	33%
Card games (e.g., poker, bridge, euchre)	29%
Platform/console games (e.g., PS5, Xbox, Nintendo Switch)	28%
Social and bar games (e.g., darts, billiards, cornhole, hatchet-throwing)	19%
Play on a sports team or an individual sport	15%
Fantasy/strategy games (e.g., Dungeons & Dragons, Wizards of the Coast, Strat-O-Matic)	12%
Trading card games (e.g., Pokémon, Magic, Yu-Gi-Oh!)	9%
AR/VR games (with a headset or phone, etc.)	7%
None of the above	18%



## PUBLIC POLL FINDINGS AND METHODOLOGY

3. For which of the following reasons, if any, do you play games or sports in your spare time? Select all that apply.

*Base: Did not select "None of the above" in Q2*

	<b>Total (N=885)</b>
To relax/unwind	67%
To spend time with friends/family	47%
To challenge myself or compete	43%
To exercise	37%
To feel like I am good at something	24%
To meet new people	22%
To feel like I am part of a team	17%
Other	2%
None of the above	5%

4. When you are a fan of a sports or gaming team, how do you express your support? Select all that apply.

	<b>Total</b>
Buying apparel	43%
Following on social media	33%
Sharing content on social media	24%
Attending events (Comic-Con, fan fests)	18%
Collecting memorabilia	17%
Fantasy gaming/sports betting	14%
Creating content on social media	11%
Content creator platforms (Patreon, Kickstarter, etc.)	7%
Costume play	6%
Buying NFTs	4%
None of the above	33%



## PUBLIC POLL FINDINGS AND METHODOLOGY

### 5. How much do you agree or disagree with the following?

#### Total Agree Summary

	<b>Total</b>
I like watching other people play sports or games in person	61%
I buy merchandise or apparel for sports/games <u>as a fan</u>	56%
Participating in sports and games enhances my life	48%
I am more likely to buy products or services from companies that sponsor my favorite team(s)	41%
I like watching other people play sports or games online	40%
I engage in in-person activities, such as sports, bar games and tabletop games to meet people and socialize	39%
I buy merchandise or apparel for sports/games <u>as a fashion statement</u>	39%
I like researching and investing in the best apparel and equipment for my chosen sports or activities	38%
I have met my closest friends through sports or leisure activities	34%
I engage in digital activities, such as video games, extended reality worlds and esports to meet people and socialize	30%

#### a. I engage in in-person activities, such as sports, bar games and tabletop games to meet people and socialize

	<b>Total</b>
Strongly agree	14%
Somewhat agree	25%
Neither agree nor disagree	21%
Somewhat disagree	16%
Strongly disagree	24%
<i>Agree (Net)</i>	<i>39%</i>
<i>Disagree (Net)</i>	<i>41%</i>





## PUBLIC POLL FINDINGS AND METHODOLOGY

5. How much do you agree or disagree with the following? (*Continued*)

b. I engage in digital activities, such as video games, extended reality worlds and esports to meet people and socialize

	<b>Total</b>
Strongly agree	12%
Somewhat agree	18%
Neither agree nor disagree	19%
Somewhat disagree	18%
Strongly disagree	33%
<i>Agree (Net)</i>	<i>30%</i>
<i>Disagree (Net)</i>	<i>51%</i>

c. I like watching other people play sports or games online

	<b>Total</b>
Strongly agree	15%
Somewhat agree	26%
Neither agree nor disagree	20%
Somewhat disagree	16%
Strongly disagree	24%
<i>Agree (Net)</i>	<i>40%</i>
<i>Disagree (Net)</i>	<i>40%</i>

d. I like watching other people play sports or games in person

	<b>Total</b>
Strongly agree	24%
Somewhat agree	36%
Neither agree nor disagree	17%
Somewhat disagree	10%
Strongly disagree	12%
<i>Agree (Net)</i>	<i>61%</i>
<i>Disagree (Net)</i>	<i>22%</i>

e. I have met my closest friends through sports or leisure activities

	<b>Total</b>
Strongly agree	11%
Somewhat agree	23%
Neither agree nor disagree	19%
Somewhat disagree	20%
Strongly disagree	27%
<i>Agree (Net)</i>	<i>34%</i>
<i>Disagree (Net)</i>	<i>47%</i>





## PUBLIC POLL FINDINGS AND METHODOLOGY

5. How much do you agree or disagree with the following? (Continued)

f. Participating in sports and games enhances my life

	<b>Total</b>
Strongly agree	16%
Somewhat agree	32%
Neither agree nor disagree	24%
Somewhat disagree	12%
Strongly disagree	17%
<i>Agree (Net)</i>	<i>48%</i>
<i>Disagree (Net)</i>	<i>29%</i>

g. I like researching and investing in the best apparel and equipment for my chosen sports or activities

	<b>Total</b>
Strongly agree	12%
Somewhat agree	26%
Neither agree nor disagree	25%
Somewhat disagree	16%
Strongly disagree	21%
<i>Agree (Net)</i>	<i>38%</i>
<i>Disagree (Net)</i>	<i>38%</i>

h. I buy merchandise or apparel for sports/games as a fan

	<b>Total</b>
Strongly agree	23%
Somewhat agree	33%
Neither agree nor disagree	17%
Somewhat disagree	10%
Strongly disagree	17%
<i>Agree (Net)</i>	<i>56%</i>
<i>Disagree (Net)</i>	<i>27%</i>

i. I buy merchandise or apparel for sports/games as a fashion statement

	<b>Total</b>
Strongly agree	13%
Somewhat agree	26%
Neither agree nor disagree	23%
Somewhat disagree	15%
Strongly disagree	23%
<i>Agree (Net)</i>	<i>39%</i>
<i>Disagree (Net)</i>	<i>38%</i>





## PUBLIC POLL FINDINGS AND METHODOLOGY

5. How much do you agree or disagree with the following? *(Continued)*
- j. I am more likely to buy products or services from companies that sponsor my favorite team(s)

	<b>Total</b>
Strongly agree	14%
Somewhat agree	27%
Neither agree nor disagree	26%
Somewhat disagree	13%
Strongly disagree	19%
<i>Agree (Net)</i>	<i>41%</i>
<i>Disagree (Net)</i>	<i>33%</i>

6. Does your child/children participate in sports or leisure gaming in any of the following settings? Select all that apply.

*Base: Has a child current living in the household*

	<b>Total (N=321)</b>
Play informally with friends	43%
Play through school team	40%
Play through community, recreational or religious league	34%
My child/children does not/do not play sports or games	22%
Train on their own	18%
Have private coaches or group lessons	15%



## PUBLIC POLL FINDINGS AND METHODOLOGY

### 7. How much do you agree or disagree with the following?

#### Total Agree Summary

	Total
<b>[Has child in household]</b> My child/children learn valuable life lessons through sports or games	76%
Parents often take youth sports too seriously and ruin it for the kids	74%
Youth sports should be more about fun and fundamentals than winning	67%
<b>[Has child in household]</b> I hope my child/children get scholarships for their sports or gaming	54%
Youth sports are becoming too competitive	54%
It is too expensive to participate in organized sports or gaming	50%
<b>[Has child in household]</b> I hope my child/children can become a professional in their sports or gaming pursuits	49%
Sports are becoming too competitive	48%
Sports are becoming too technical	42%
Youth sports should allow everyone to win a trophy	35%

#### a. **[Has child in household]** My child/children learn valuable life lessons through sports or games

	Total (N=321)
Strongly agree	38%
Somewhat agree	38%
Neither agree nor disagree	19%
Somewhat disagree	3%
Strongly disagree	3%
<i>Agree (Net)</i>	<i>76%</i>
<i>Disagree (Net)</i>	<i>5%</i>



## PUBLIC POLL FINDINGS AND METHODOLOGY

7. How much do you agree or disagree with the following? (*Continued*)

- b. **[Has child in household]** I hope my child/children get scholarships for their sports or gaming

	<b>Total (N=321)</b>
Strongly agree	24%
Somewhat agree	30%
Neither agree nor disagree	31%
Somewhat disagree	9%
Strongly disagree	6%
<i>Agree (Net)</i>	<i>54%</i>
<i>Disagree (Net)</i>	<i>15%</i>

- c. **[Has child in household]** I hope my child/children can become a professional in their sports or gaming pursuits

	<b>Total (N=321)</b>
Strongly agree	20%
Somewhat agree	29%
Neither agree nor disagree	33%
Somewhat disagree	10%
Strongly disagree	8%
<i>Agree (Net)</i>	<i>49%</i>
<i>Disagree (Net)</i>	<i>18%</i>

- d. It is too expensive to participate in organized sports or gaming

	<b>Total</b>
Strongly agree	16%
Somewhat agree	34%
Neither agree nor disagree	32%
Somewhat disagree	12%
Strongly disagree	6%
<i>Agree (Net)</i>	<i>50%</i>
<i>Disagree (Net)</i>	<i>18%</i>

## PUBLIC POLL FINDINGS AND METHODOLOGY

7. How much do you agree or disagree with the following? (*Continued*)

e. Sports are becoming too technical

	<b>Total</b>
Strongly agree	14%
Somewhat agree	27%
Neither agree nor disagree	36%
Somewhat disagree	17%
Strongly disagree	6%
<i>Agree (Net)</i>	<i>42%</i>
<i>Disagree (Net)</i>	<i>23%</i>

f. Youth sports are becoming too competitive

	<b>Total</b>
Strongly agree	22%
Somewhat agree	31%
Neither agree nor disagree	26%
Somewhat disagree	12%
Strongly disagree	8%
<i>Agree (Net)</i>	<i>54%</i>
<i>Disagree (Net)</i>	<i>20%</i>

g. Sports are becoming too competitive

	<b>Total</b>
Strongly agree	18%
Somewhat agree	31%
Neither agree nor disagree	26%
Somewhat disagree	16%
Strongly disagree	10%
<i>Agree (Net)</i>	<i>48%</i>
<i>Disagree (Net)</i>	<i>26%</i>

h. Youth sports should be more about fun and fundamentals than winning

	<b>Total</b>
Strongly agree	33%
Somewhat agree	33%
Neither agree nor disagree	22%
Somewhat disagree	8%
Strongly disagree	3%
<i>Agree (Net)</i>	<i>67%</i>
<i>Disagree (Net)</i>	<i>11%</i>

## PUBLIC POLL FINDINGS AND METHODOLOGY

7. How much do you agree or disagree with the following? *(Continued)*

i. Youth sports should allow everyone to win a trophy

	<b>Total</b>
Strongly agree	15%
Somewhat agree	20%
Neither agree nor disagree	21%
Somewhat disagree	21%
Strongly disagree	23%
<i>Agree (Net)</i>	<i>35%</i>
<i>Disagree (Net)</i>	<i>44%</i>

j. Parents often take youth sports too seriously and ruin it for the kids

	<b>Total</b>
Strongly agree	34%
Somewhat agree	39%
Neither agree nor disagree	18%
Somewhat disagree	4%
Strongly disagree	4%
<i>Agree (Net)</i>	<i>74%</i>
<i>Disagree (Net)</i>	<i>9%</i>

8. What barriers, if any, have kept your child/children from participating in a sport or game?

*Base: Has a child current living in the household*

	<b>Total (N=321)</b>
Cost	33%
Time requirements	31%
Travel requirements	23%
Too competitive	20%
Resources aren't available in my community	18%
They don't want to	18%
Cliques/favoritism	14%
Community isn't welcoming to someone like me	9%
Gender restrictions	8%
I don't know who to talk to	6%
None of the above	28%



## PUBLIC POLL FINDINGS AND METHODOLOGY

9. What barriers, if any, have kept you from participating in a sport or game?

	<b>Total</b>
Cost	29%
I don't want to	28%
Time requirements	26%
Travel requirements	17%
Too competitive	15%
Resources aren't available in my community	11%
Cliques/favoritism	10%
I don't know who to talk to	8%
Community isn't welcoming to someone like me	7%
Gender restrictions	6%
None of the above	25%

10. How much do you agree or disagree with the following?

### Total Agree Summary

	<b>Total</b>
In the next five years, climate change will affect how much time I can spend outdoors	43%
In the next five years, outdoor sports will require new equipment to continue playing due to climate change	35%
It's OK for amateur gamers to use technology tricks or accessories to improve their performance	26%
It's OK for amateur athletes or gamers to use performance-enhancing substances (like prescriptions or supplements), equipment (like shoes or uniforms), or training technology (like 3D form tracking or high-altitude training) to improve their performance	22%
Allowing athletes to change their genetic makeup for better performance is fair	20%



## PUBLIC POLL FINDINGS AND METHODOLOGY

10. How much do you agree or disagree with the following? *(Continued)*

- a. It's OK for amateur athletes or gamers to use performance-enhancing substances (like prescriptions or supplements), equipment (like shoes or uniforms), or training technology (like 3D form tracking or high-altitude training) to improve their performance

	<b>Total</b>
Strongly agree	8%
Somewhat agree	14%
Neither agree nor disagree	21%
Somewhat disagree	17%
Strongly disagree	40%
<i>Agree (Net)</i>	<i>22%</i>
<i>Disagree (Net)</i>	<i>57%</i>

- b. It's OK for amateur gamers to use technology tricks or accessories to improve their performance

	<b>Total</b>
Strongly agree	7%
Somewhat agree	19%
Neither agree nor disagree	31%
Somewhat disagree	20%
Strongly disagree	23%
<i>Agree (Net)</i>	<i>26%</i>
<i>Disagree (Net)</i>	<i>43%</i>

- c. In the next five years, climate change will affect how much time I can spend outdoors

	<b>Total</b>
Strongly agree	15%
Somewhat agree	28%
Neither agree nor disagree	28%
Somewhat disagree	12%
Strongly disagree	16%
<i>Agree (Net)</i>	<i>43%</i>
<i>Disagree (Net)</i>	<i>28%</i>

## PUBLIC POLL FINDINGS AND METHODOLOGY

10. How much do you agree or disagree with the following? *(Continued)*

- d. In the next five years, outdoor sports will require new equipment to continue playing due to climate change

	<b>Total</b>
Strongly agree	13%
Somewhat agree	22%
Neither agree nor disagree	37%
Somewhat disagree	13%
Strongly disagree	14%
<i>Agree (Net)</i>	<i>35%</i>
<i>Disagree (Net)</i>	<i>27%</i>

- e. Allowing athletes to change their genetic makeup for better performance is fair

	<b>Total</b>
Strongly agree	8%
Somewhat agree	12%
Neither agree nor disagree	24%
Somewhat disagree	16%
Strongly disagree	40%
<i>Agree (Net)</i>	<i>20%</i>
<i>Disagree (Net)</i>	<i>56%</i>



## PUBLIC POLL FINDINGS AND METHODOLOGY

11. Over the next 12 months, do you think the following will get [ROTATE BETTER/WORSE] better or worse, or will things generally stay the same?

### Total Will get better Summary

	Total
The equality of opportunity in sports or gaming	22%
The gender balance in sports or gaming	22%
The fairness of competition	18%
The cost of participating in sports or gaming activities	15%
The time available you have for sports or gaming	15%
The cost of watching sports or gaming activities in person	14%

### Total Will get worse Summary

	Total
The cost of watching sports or gaming activities in person	50%
The cost of participating in sports or gaming activities	49%
The gender balance in sports or gaming	26%
The fairness of competition	25%
The equality of opportunity in sports or gaming	22%
The time available you have for sports or gaming	19%

#### a. The cost of participating in sports or gaming activities

	Total
Will get better	15%
Will stay the same	36%
Will get worse	49%

#### b. The cost of watching sports or gaming activities in person

	Total
Will get better	14%
Will stay the same	37%
Will get worse	50%





## PUBLIC POLL FINDINGS AND METHODOLOGY

12. Over the next 12 months, do you think the following will get **[ROTATE BETTER/WORSE]** better or worse, or will things generally stay the same? *(Continued)*

c. The time available you have for sports or gaming

	Total
Will get better	15%
Will stay the same	66%
Will get worse	19%

d. The fairness of competition

	Total
Will get better	18%
Will stay the same	57%
Will get worse	25%

e. The equality of opportunity in sports or gaming

	Total
Will get better	22%
Will stay the same	56%
Will get worse	22%

f. The gender balance in sports or gaming

	Total
Will get better	22%
Will stay the same	52%
Will get worse	26%

12. For each of the following pairs of statements, please select the one that comes closest to your view, even if neither statement is exactly right.

	Total
I prefer social interactions in person	76%
I prefer social interactions in virtual and digital spaces	24%

	Total
I prefer playing in person	73%
I prefer playing in virtual or online spaces	27%





## PUBLIC POLL FINDINGS AND METHODOLOGY

12. For each of the following pairs of statements, please select the one that comes closest to your view, even if neither statement is exactly right. *(Continued)*

	Total
Youth contact sports are safe enough	60%
Youth contact sports are too unsafe	40%

	Total
I do not spend time making content about the games I play or am a fan of	74%
I spend time making content about the games I play or am a fan of	26%

	Total
Sports or game rules and regulations should evolve as we learn more about player health and safety	59%
Sports or game rules and regulations should stay pure to their original forms	41%

	Total
Enhancing an athletes' performance through science and technology makes games less real	60%
Enhancing an athletes' performance through science and technology makes games better	40%

	Total
More virtual play will lead to greater isolation	68%
More virtual play will lead to greater social opportunities	32%

## PUBLIC POLL FINDINGS AND METHODOLOGY

13. For each of the following future scenarios, select the one that you MOST WANT to happen.

	<b>Total</b>
A world where we spend most of our leisure time doing things in the physical world	79%
A world where we spend most of our leisure time in online or in virtual spaces	21%

	<b>Total</b>
A world where the effects of climate change are slowed down and we can spend our leisure time where we choose	83%
A world where climate changes forces us to spend more leisure time indoors	17%

	<b>Total</b>
A world where we have more time for leisure and play	81%
A world where we have less time for leisure and play	19%

	<b>Total</b>
A world where all kids have equal access to opportunities to compete in games and sports	79%
A world where kids need access to expensive coaches and equipment to succeed in games and sports	21%

	<b>Total</b>
A world where we spend more of our leisure time actively participating in games and sports	69%
A world where more of our leisure time is spent passively watching people play games and sports	31%

## PUBLIC POLL FINDINGS AND METHODOLOGY

14. For each of the following future scenarios, select the one that seems MOST LIKELY to happen.

	<b>Total</b>
A world where we spend most of our leisure time in online or in virtual spaces	51%
A world where we spend most of our leisure time doing things in the physical world	49%

	<b>Total</b>
A world where the effects of climate change are slowed down and we can spend our leisure time where we choose	55%
A world where climate changes forces us to spend more leisure time indoors	45%

	<b>Total</b>
A world where we have more time for leisure and play	55%
A world where we have less time for leisure and play	45%

	<b>Total</b>
A world where all kids have equal access to opportunities to compete in games and sports	59%
A world where kids need access to expensive coaches and equipment to succeed in games and sports	41%

	<b>Total</b>
A world where more of our leisure time is spent passively watching people play games and sports	53%
A world where we spend more of our leisure time actively participating in games and sports	47%



## PUBLIC POLL FINDINGS AND METHODOLOGY

### About the Study

These are some of the findings of an Ipsos poll conducted between November 14 – 15, 2022. For this survey, a sample of 1,115 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample was randomly drawn from [Ipsos' online panel](#), [partner online panel sources](#), and “river” [sampling](#) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2019 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.6 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,115, DEFF=1.5, adjusted Confidence Interval=+/- 5.1 percentage points).

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GAME CHANGERS





## PUBLIC POLL FINDINGS AND METHODOLOGY

### About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

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