

How Essential is Sports?

Consumer Attitudes on Sports During the Coronavirus Pandemic

May 11, 2020



Joe Brown
Principal Consultant
JWB3 Media Insights
joe@jwb3.com
609-412-0055

In Partnership with



Ilovethefullcircle.com

Executive Summary

An online survey was conducted about the coronavirus pandemic's impact on sports. The survey was conducted May 5-8 in the United States among 1,008 people aged 18+.

- **Fans miss sports more than church.** 47% of avid sports fans miss watching sports on TV everyday, which is more than other activities that have been impacted by coronavirus like going to church, eating at restaurants, or going to the movies.
- **Sporting events are as essential as restaurants and malls to most Americans.** Professional sports events held without fans are viewed as essential or more essential than many businesses that are re-opening. Most Americans think professional sports events are at least as essential as Bars/Restaurants (53%), Malls (59%), and Golf Courses (77%); but there remains a divide as 48% agree that sports should not return until other non-essential businesses are fully re-opened.
- **Fans are conflicted. They want normalcy, but fear spread.** Nearly two-thirds (62%) of Americans agree that sports on TV is an important step for the country returning "back to normal." However 54% agree that sports are returning too quickly if they return by mid-June. 58% say events will have to be postponed again due to the virus.
- **Auto Racing, Golf, and Tennis are viewed as "safe."** Individual sports are perceived as safe to play during the pandemic by nearly two-thirds of Americans while contact sports - Boxing, Football, Basketball, Soccer, and Hockey - have low safety scores.
- **Leagues and Networks must give back.** 66% expect some money from professional sports events to be donated to coronavirus related charities.
- **Even with local approval for events many are still unconvinced.** 44% of Americans only want sports to return when it's safe for fans, while 39% think sports should return when approved by local governments. The remaining 17% of Americans are ready for events to return ASAP.

Recommendations

- **Message the positive.** Fans agree that sports returning will make them happier and bring communities and families closer together. Returning to competition can be a sign of strength in the face of the pandemic.
- **Give back.** Over 33 million have become unemployed during this crisis. Many fans think sports events are only coming back to generate revenue for leagues and networks. Create a program where each event held creates a donation to help those in need.
- **Experiment with formats.** With a strong divide about when to return to competition, the time is right to experiment with limited events that maximize safety rather than regular league play. This is especially true for contact sports. Limiting participation to an All Star or tournament format may safely test the waters before a full return.



Americans miss watching sports on TV daily; more than going to the movies or church

- Americans miss watching sports on TV tremendously. 24% said “I miss it everyday” when asked about watching sports on TV along with other activities that have been limited during by the coronavirus. This ranks second only to “eating out in restaurants” at 35% and ahead of other activities like going to the movies (21%) or Church (21%).
- Sports fandom naturally drives how much watching sports on TV is missed. Among avid fans, nearly half (47%) said they miss watching sports everyday, ranking as their most missed activity.

How much have you missed the following entertainment activities that have been limited because of coronavirus?
 Percentage indicating “I Miss It Everyday”

Activity	Avid Sports Fans n=447	All Sports Fans n=814	Total Fans and Non-Fans n=1008
Watching sports on TV	47%	29%	24%
Eating out at restaurants	43%	38%	35%
Going to movies	30%	23%	21%
Attending sporting events in person	27%	18%	15%
Going to the gym	27%	21%	19%
Participating in sports	26%	18%	15%
Shopping with friends	25%	22%	21%
Attending church/religious services	24%	22%	20%
Going to work/office/school	24%	18%	17%
Going to concerts	22%	16%	15%
Socializing at bars/clubs	22%	18%	16%

Q1 :Over the past month, how much have you missed the following entertainment activities that have been limited because of coronavirus? Please use a scale from 1 to 5, where 1 means “have not missed at all” and 5 means “I miss it every day.” Please select “N/A” if this is not a usual activity for you.

Sports fans = responded 2+ “How big of a sports fan are you overall?” (5 point scale). Non-Fans selected 1 “Not a Fan at All” while Avid Fans selected 4 or 5 “Huge Fan”. N/A selected included in percentage base

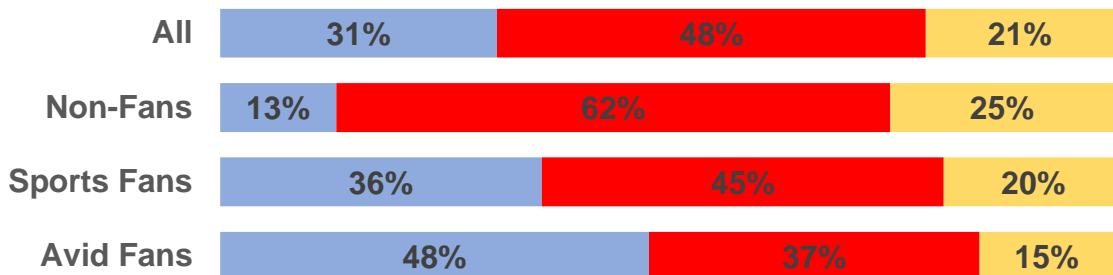


Sports Events on TV are as essential, or even more essential, than some businesses that are reopening

- On a macro level, Americans are still divided about sports events returning before other non-essential businesses are re-opened. But when asked about specific businesses, “sports events held without fans” is viewed as essential or more essential than businesses that have reopened like golf courses, bowling alleys, and tattoo shops.
- Overall 48% do not think events should be held before other non-essential businesses have returned, with an additional 21% indicating they are unsure (selected “Don’t Know”).
- Numbers are similar among all sports fans with 45% indicating that sports should not return before other businesses. Even among avid fans, there is still hesitation with over one third (37%) saying sports should not return before other businesses.
- When presented with specific businesses, avid sports fans think sports are at least as essential as most business that were surveyed including Salons/Barbershops (69% say sports are more/equally essential), Malls (77%), and Restaurants (71%).

Should professional sports events be held before other non-essential businesses are fully re-opened?

■ Yes ■ No ■ Don't Know



Q2: To limit spread of the coronavirus, protections like social distancing and closure of non-essential businesses have been put in place in most states. Many states are now re-opening and professional sports leagues are planning events that will be held WITHOUT fans that will be televised. Should Professional Sports hold events before other non-essential businesses are fully re-opened? Sports fans = responded 2+ on Question. “How big of a sports fan are you overall?” (5 point scale). Non-Fans selected 1 “Not a Fan at All” while Avid Fans selected 4 or 5 “Huge Fan”. May not add to 100% due to rounding

Percentage indicating that sports are equal to or more essential than:

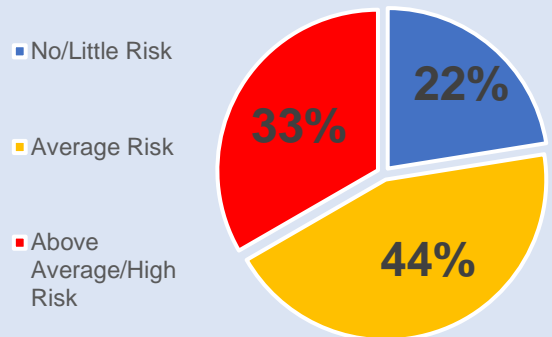
	Salons/ Barbers	Bars/ Restaurants	Golf Courses	Bowling Alleys	Tattoo Parlors	Indoor Malls	Places of Worship
All	46%	53%	77%	78%	75%	59%	43%
Avid Fans	69%	71%	83%	83%	81%	77%	60%

Q3. Do you consider the following businesses and activities to be more or less essential than professional sports events being held without fans?

Even without fans, the perceived risk of virus spread varies by sport; Golf, Auto Racing, and Tennis are “safer” sports

- Even without fans, there is concern for virus spread among the players, coaches, and other essential employees needed to hold events. A near majority (44%) of Americans feel that having these events still poses an average risk of virus spread.
- Not all sports are equal when it comes to perceived risk of coronavirus spread through competition. Individual sports like Golf are thought to be least risky with 65% classifying the sport as “safe” (top two box % on five point scale). Auto Racing (65%), and Tennis (58%) are also perceived as safer sports.
- Contact sports like Boxing, Football, Basketball, Soccer, and Hockey are perceived to be far less safe to be played during the pandemic.
- Americans are divided on the safety of Baseball. 35% indicated the sport having above average safety while 36% scored Baseball as having below average safety.

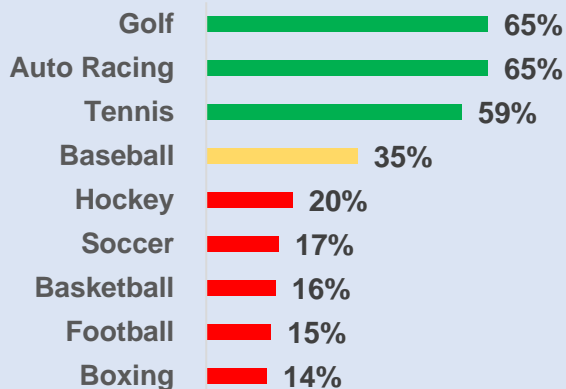
Risk of new coronavirus cases from professional sports events held without fans:



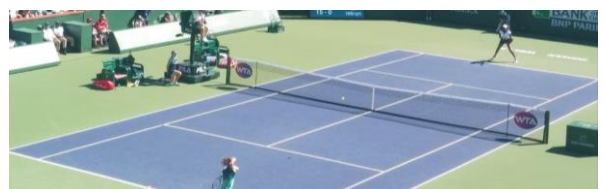
Q5. How would you classify the risk of new coronavirus cases from professional sports events held without fans, but with essential employees (players, coaches, officials, media, security, etc)?

Which sports are the safest to be played during the pandemic?

Top Two Box % (5 pt scale)



Q11. Since different sports require different amounts of contact between athletes, which sports do you think are the safest to be played during the pandemic? 5 point scale “Not Safe” to “Very Safe”



Sports events returning by mid-June are an important step for getting “back to normal” but they might be coming back too quickly

- There are many positive aspects related to the return of sports. Nearly two-thirds (62%) of Americans agree that sports on TV is an important step for the country returning “back to normal.” Among avid sports fans this grows to 78%.
- Avid sports fans agree that sports on TV will make them happier (80%), give them something to look forward to (81%), and bring their community closer together (64%).
- While avid fans seek the happiness and enjoyment they get from sports, they also see drawbacks as well. 51% agree that sports events are returning too quickly and 54% say having sports events at this time is irresponsible.
- Sports is a multi-billion dollar industry and Americans are aware of the money being lost. While there are many positives to sports returning, 60% agree that sports are only coming back because of money and greed.
- Continued spread of coronavirus remains a concern. When asked if having sports events is worth the risk of additional infections, 59% of Americans disagreed.

Consumer Attitudes Toward Sports Returning by Mid-June

% Agree

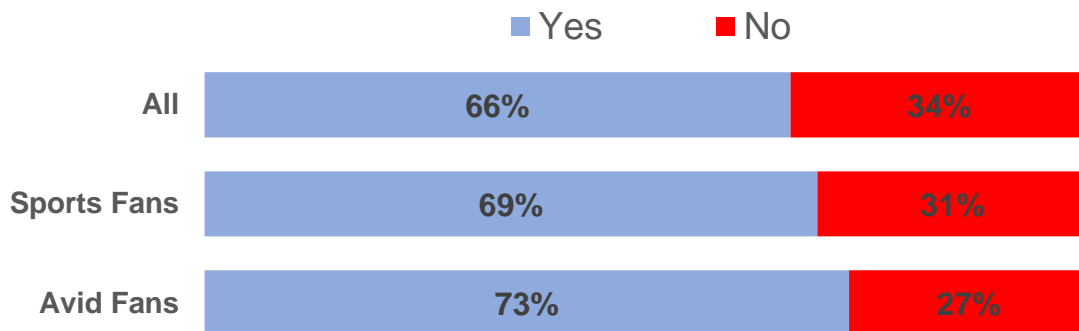
	All n=1008	Avid Fans n=447
Sports on TV is an important step for the country returning "back to normal"	62%	78%
The return of sports will give me something positive to look forward to	53%	81%
The return of sports will make me happier	47%	80%
Having sports to watch will bring my community closer together	47%	64%
Sports returning will bring my family closer together	32%	56%
Sports are only coming back because of money and greed	60%	54%
Having professional sports events at this time is irresponsible.	57%	54%
Sports returning is happening too quickly	54%	51%
Having sports events is worth the risk of additional infections	24%	37%

Q7. Assuming that professional sports events return without fans so that they can air on TV by mid-June, do you agree or disagree with the following statements? 5 Point Scale from 1= Strongly Disagree, 3= Neither Agree no Disagree, 5= Strongly Agree
Sports fans = responded 2+ on Question. "How big of a sports fan are you overall?" (5 point scale).

Paying it forward. Fans expect leagues and networks to donate some event revenue to coronavirus charities

- There is an expectation that some revenue from sports events will go toward relief efforts related to coronavirus. 66% of Americans expect sports leagues and TV networks to donate a portion of revenue generated from events.
- Fans and Non-Fans agree when it comes to this topic. 54% of non-fans expect some money to be donated. Among avid fans this grows to 73%.

Do you expect leagues & TV networks to donate a portion of revenue from events?

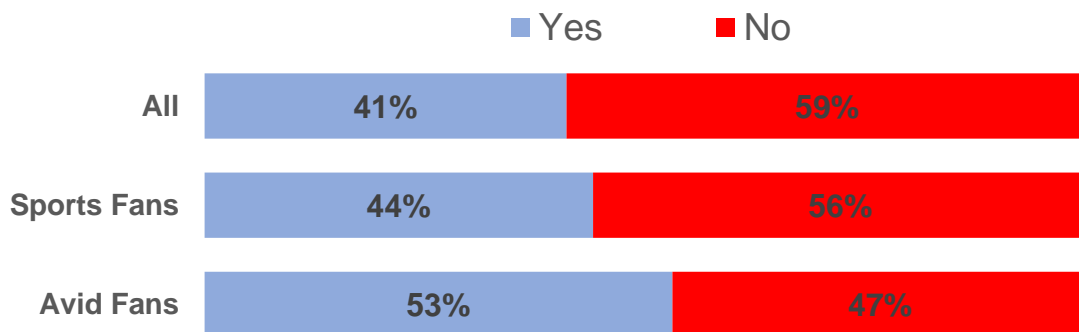


Q8. Do you expect sports leagues and TV Networks to donate a portion of money generated from televised sports events to charities related to coronavirus?

Athletes should get to choose if they want to return

- Even among the most avid sports fans, there is a divide when it comes to players returning to competition amidst the coronavirus pandemic. 53% of avid fans agree that athletes are under contract to play and should be required to play if the league schedules games. 47% believe professional athletes should choose what is best for them and when they want to return.

Should Athletes be required to play?



Q9. Should professional athletes be required to play if sports returns without fans?

Majority are ready for sports to return if OK'd by local government; but it may be too late for the NBA and NHL

- While nearly 1 in 5 are ready for sports to begin without fans ASAP, 39% think sports should begin when local governments allow the events to be held. Combined, these groups create a slight majority of 56%. Among avid fans, it's only slightly higher at 60%.
- With 44% indicating sports should only return when it's safe for fans to attend, leagues will have to carefully message their reasons for returning to avoid alienating these consumers.
- Time may be running out for both the NBA and NHL to return to competition. While the majority of avid NBA/NHL fans would like to see their sports resume the regular season or go straight to the playoffs, nearly 40% think the current season should be cancelled.

When should professional sports return?

	All n=1008	Avid Fans n=447
Events should return as soon as possible	17%	25%
Events should return only if approved by local government officials	39%	35%
Events should only return when it's safe for fans to attend	44%	40%

Q4. Which of the following best describes your feelings toward professional sports returning without fans:

What should be done about the current NBA/NHL Seasons?

	NBA Season Among NBA Avid Fans n=339	NHL Season among NHL Avid Fans N=250
Cancel the current season	38%	38%
Resume and play regular season and playoff games	29%	32%
Resume and immediately start the playoffs	24%	25%
Don't know/No opinion	9%	5%

Q12/13: What do you think the NBA (Basketball)/ NHL (Hockey) should do concerning the current season?



In 2019 both the NBA and NHL Playoffs took approximately 9 weeks to complete. With no format changes the 2020 playoffs would need to start the week of July 5th to avoid conflict with the NFL starting Sept 10.

If postponed seasons resume soon, Americans are split on further delays

- Many fans believe that sports will be delayed once again if they return in the next six weeks. 58% of Americans expect events to be postponed or cancelled again due to the coronavirus while 42% think seasons will be completed. Avid sports fans are only slightly more optimistic with 46% indicating seasons will conclude without further delay.

What will happen if postponed sports return in the next six weeks?

	All n=1008	Avid Fans n=447
Events will have to be postponed/cancelled again due to virus spread	58%	54%
Leagues will complete seasons without further delays	42%	46%

Q6. If professional sports events return without fans within the next 6 weeks which of the following is more likely to happen?

Study Methodology

Online Survey of 1,008 U.S. respondents designed by JWB3 Media Insights and conducted by Full Circle Research

Respondents Aged 18+ and modeled after US Census figures on Gender, Age, Income, Race, and Region (+/- 5%)

Survey fielded May 5 through May 8, 2020.

About JWB3 Media Insights

Building on his experience leading Strategic Insights and Research for NBC Sports Group, Joe Brown founded JWB3 Media insights in 2019. JWB3 provides consulting services to the Sports and Media industries including Consumer Insights, Audience Measurement, Primary Research, and Content Strategy Development.

While at NBC Sports, Brown created Total Audience Delivery, a cross platform audience metric which combines digital and linear audiences. He also developed NBC's "Live Across" broadcast strategy and audience research plans for the 2018 PyeongChang Winter Olympics.

About Full Circle Research

Twice-named on Inc. 5000's list of Fastest-Growing Companies in America (2017, 2019), Full Circle Research was the first and only U.S.-based, online consumer sample provider to earn ISO 26362 certification, is currently ISO 20252-certified and remains the only company to offer HoNoR (Holistic Next-level Research™). This enhanced survey experience is unprecedented and automated—a marriage of advanced technology, flexible community strategies and industry-leading quality controls that gives business decision-makers immediate access to the purest data in the industry. Full Circle's foresight, agility and commitment to innovation translate into a uniquely pro-active, consultative experience. To learn more, visit iLoveFullCircle.com.

