



**SPORTS &
LEISURE**
RESEARCH GROUP

Presented February 8, 2011

Sports Fan Mindset --2011

Two Minute Take-Aways

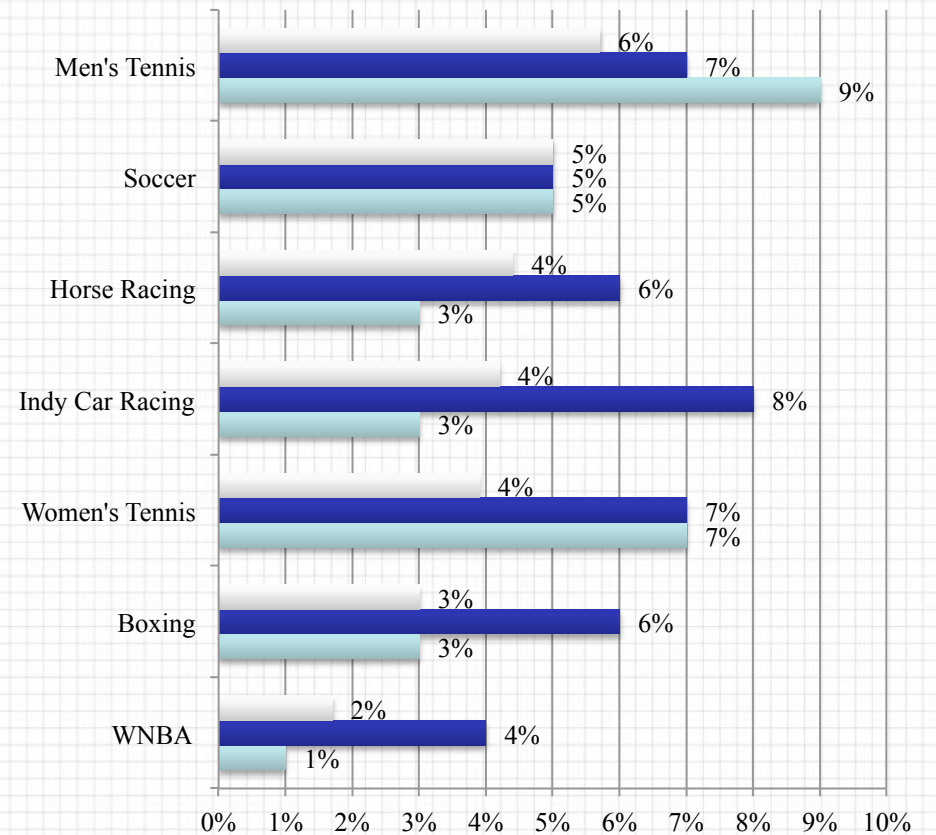
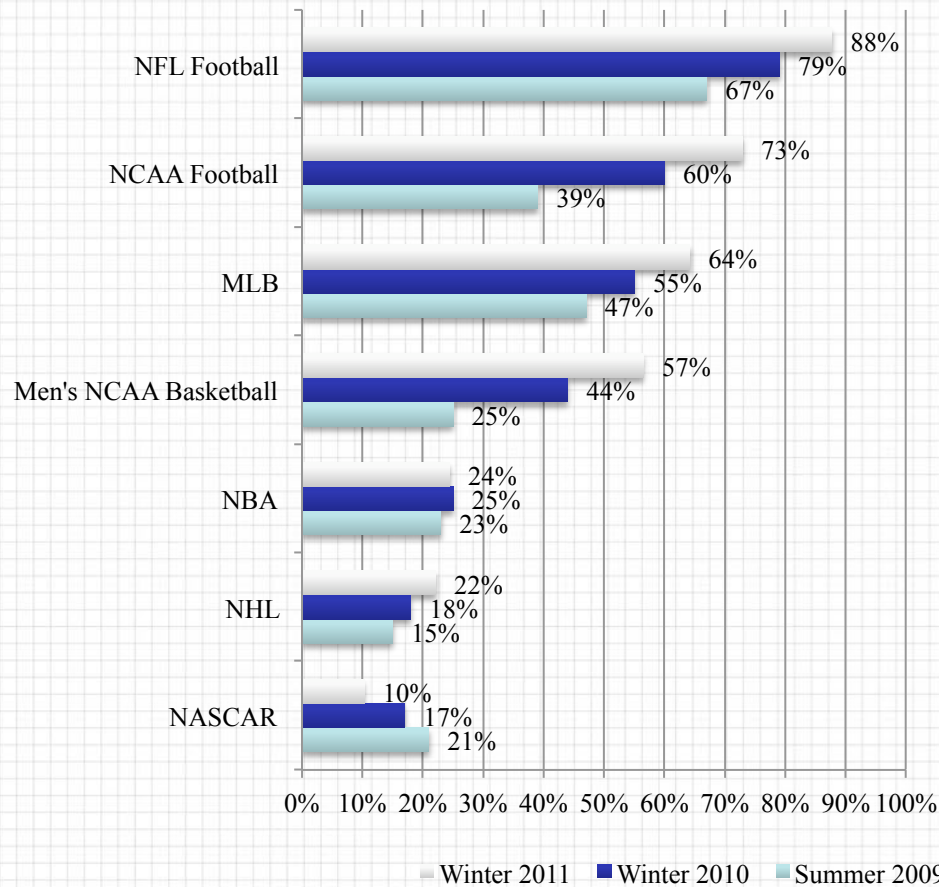
- An uptick in sports fan optimism about the year ahead, relative to recent years. Concurrently, fans still perceive lingering effects of the economic downturn. They just see themselves as breaking out of the malaise and inertia.
- The NFL, MLB, and NCAA Sports continue to grow their following. But nearly 75% feel that there are too many college bowl games.
- Fans are still struggling to manage their time/priorities, and technology isn't making it any easier.
- 70% of fans do not believe that there will be work stoppages in the NFL or NBA in 2011-12.

Background, Objectives and Methodology

- Winter 2011 SLRG Sports Omnibus
 - Assess the attitudes and perceptions of sports fans
- Sports and Leisure Research Group launched the survey in 2009, with multiple and regular tracking waves to assess dynamic change.
- The January 2011 online survey included a national sample of 1,250 Sports Fans

Sports People are Watching

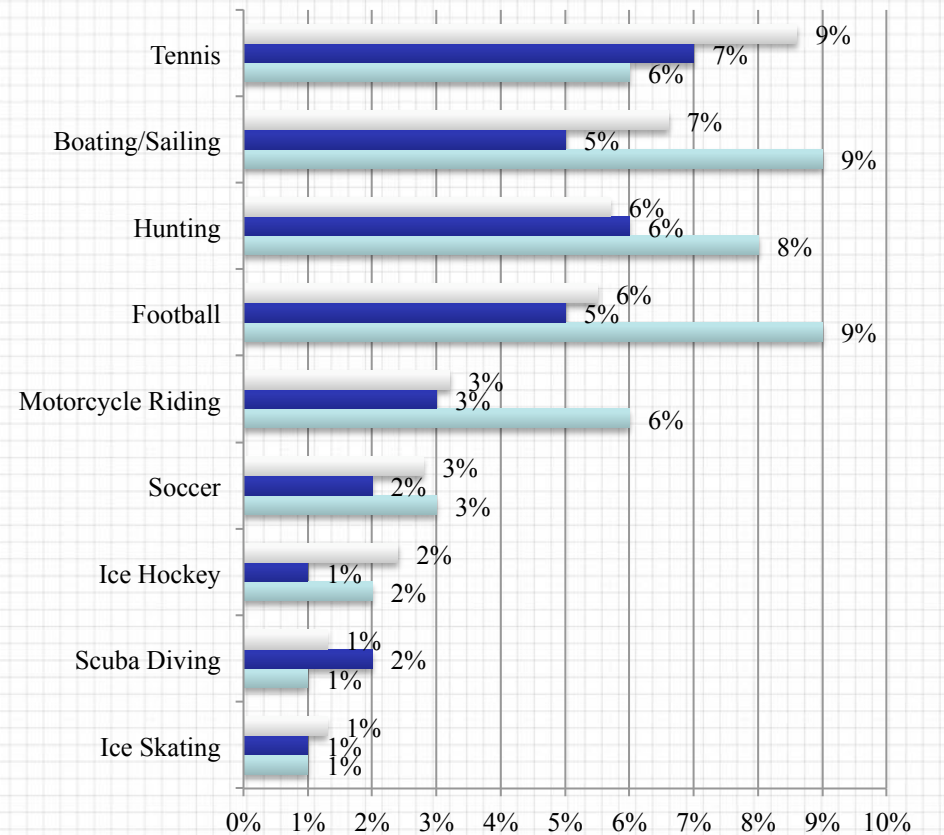
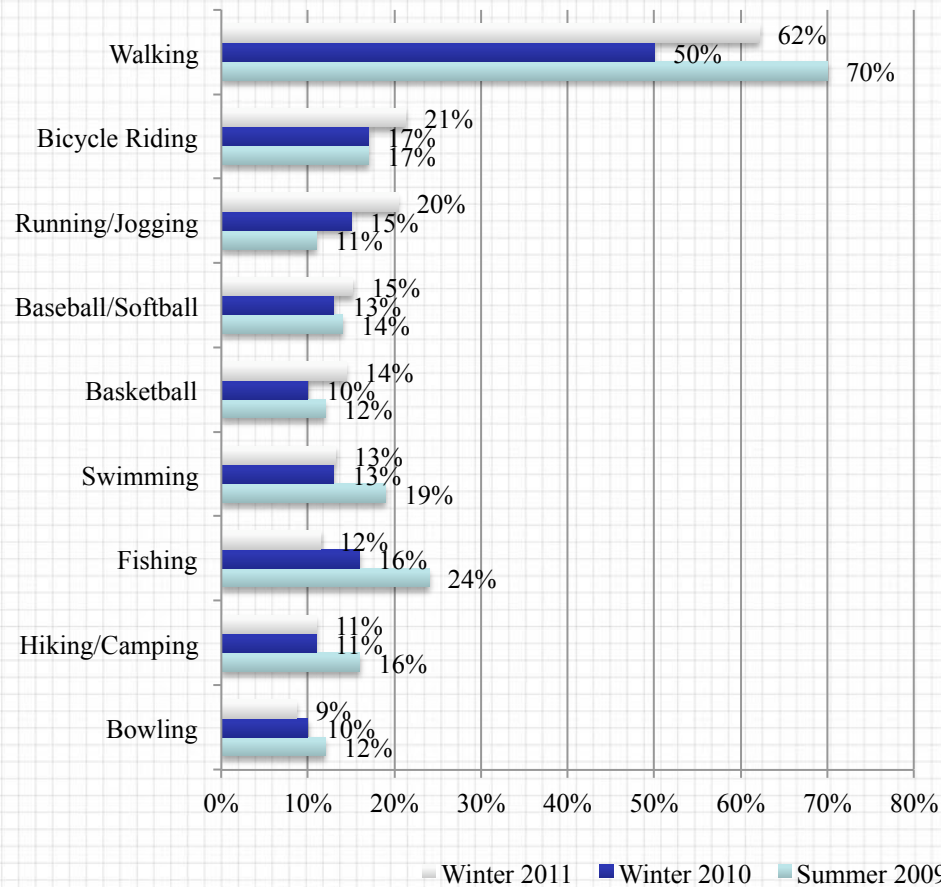
NFL , NCAA Football and Basketball, MLB Continue to grow their following. NASCAR has slipped



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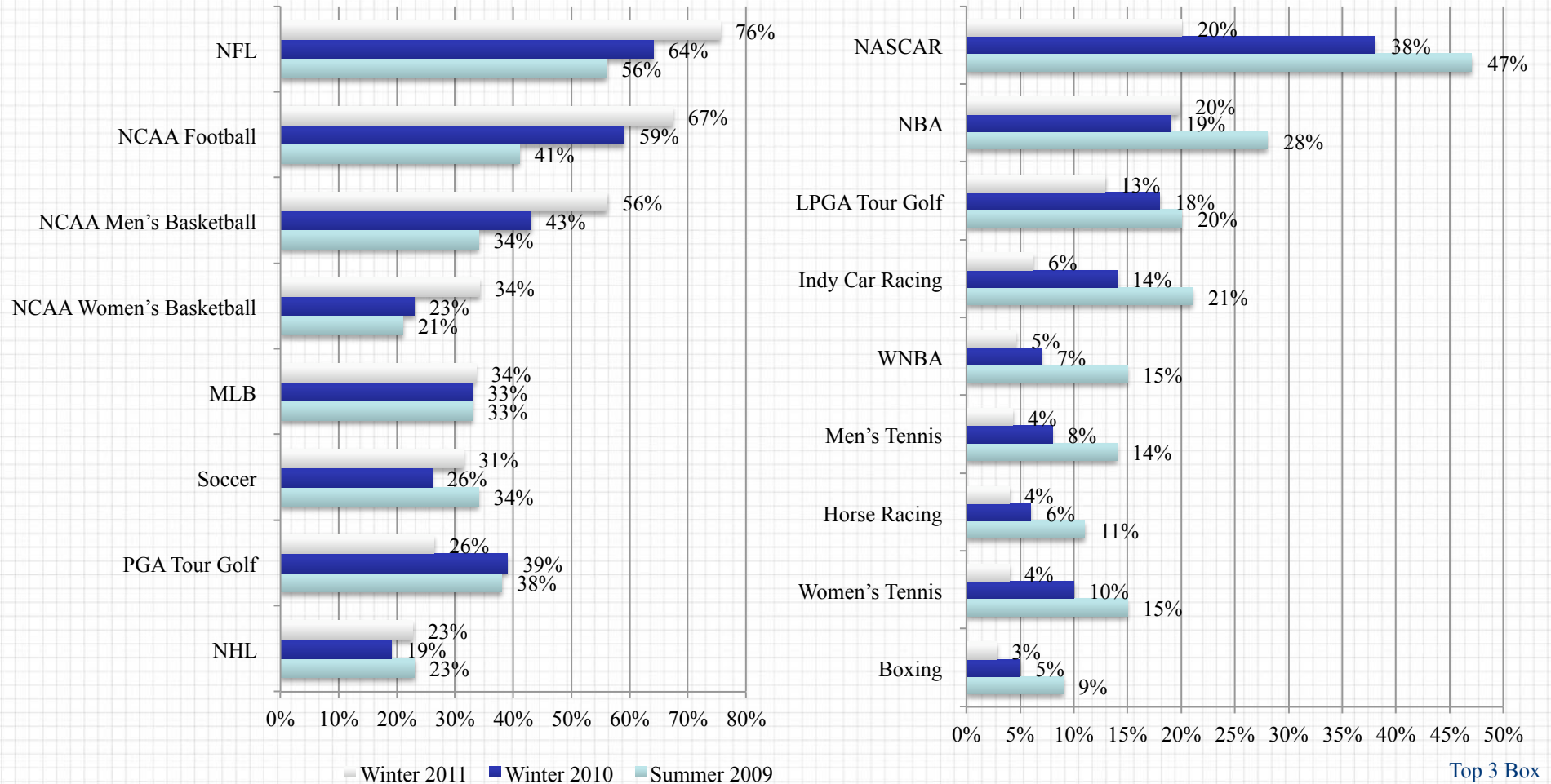
Recreational Sports Participation

Slight Uptick in Recreational Running, Cycling, Tennis



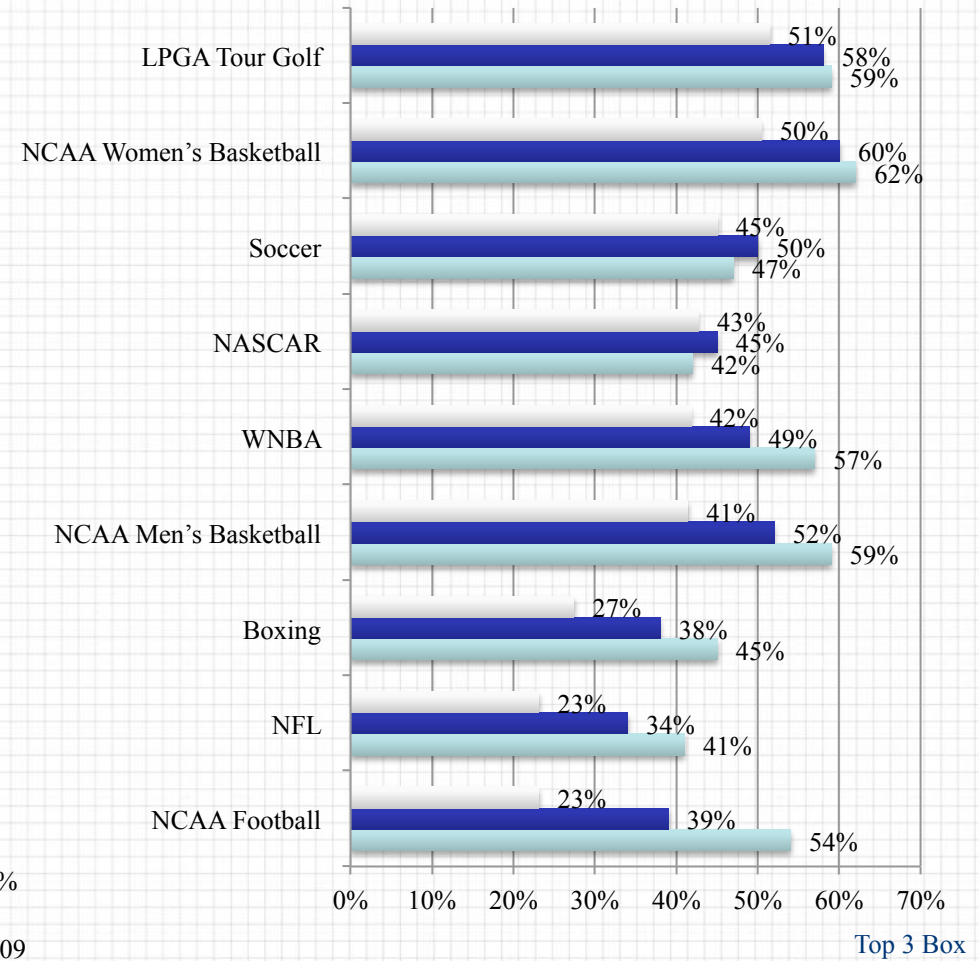
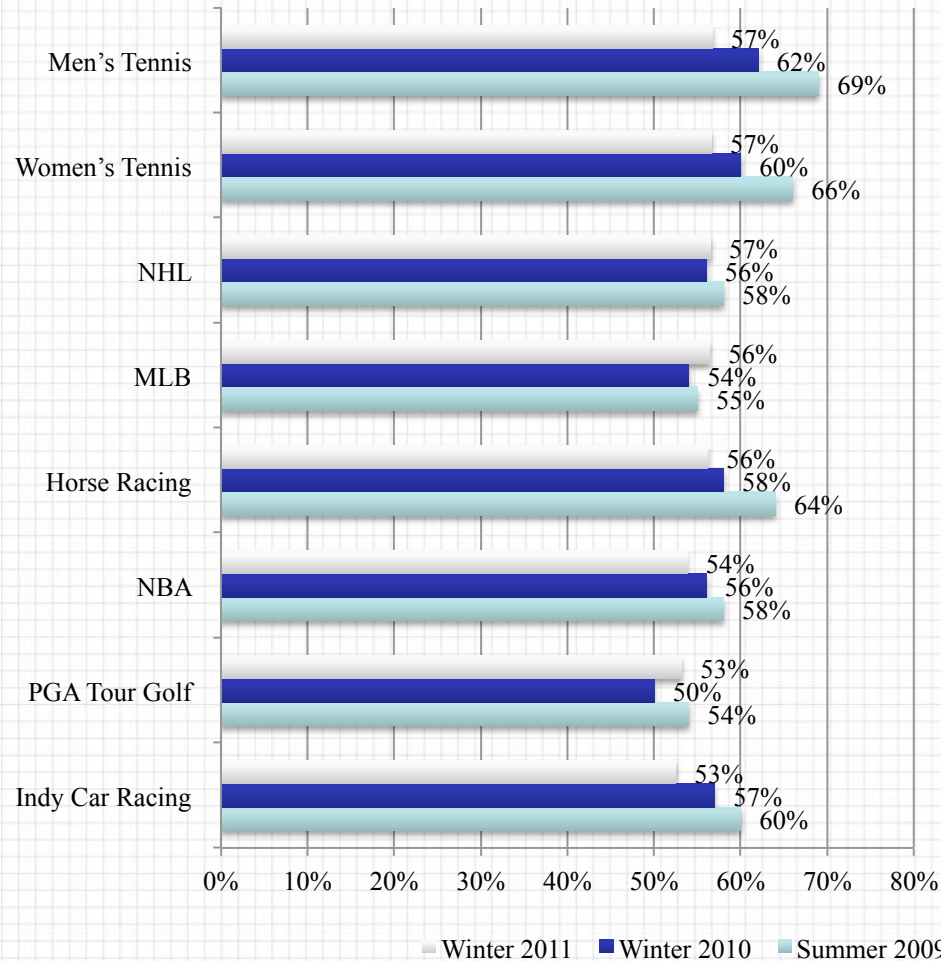
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Professional Sports Gaining Popularity



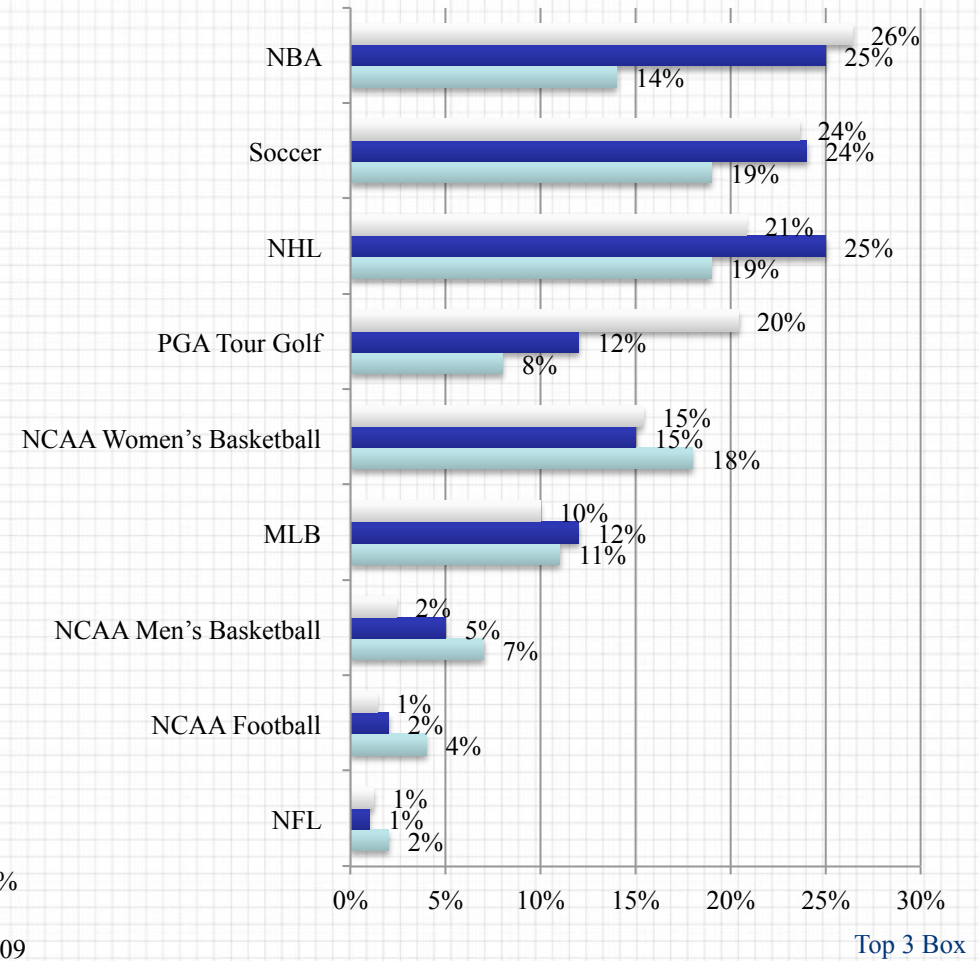
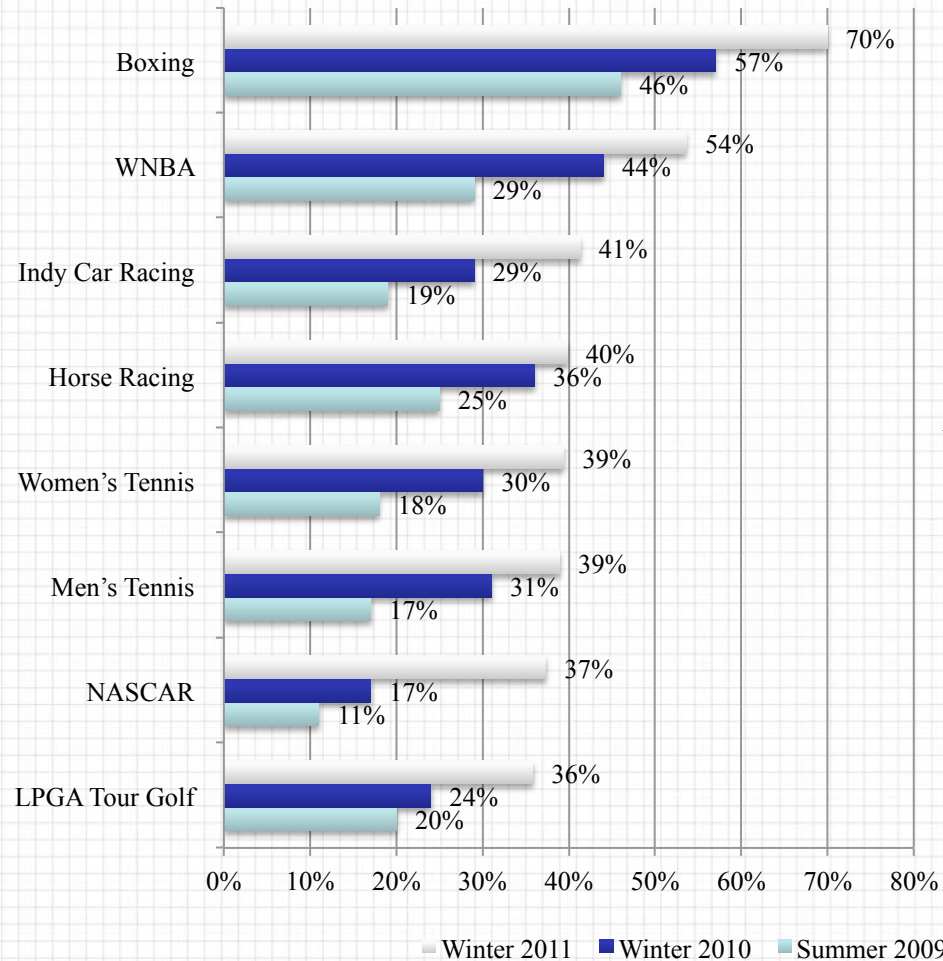
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Professional Sports Popularity Remaining Steady



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Professional Sports Losing Popularity



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Net Change in Popularity

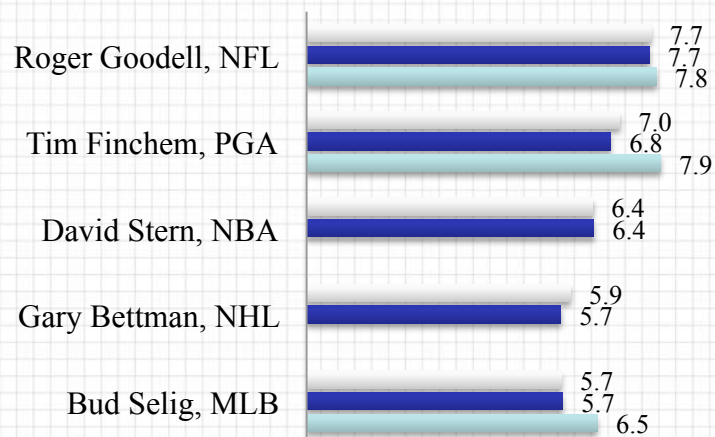
Net Change in Popularity (percentage points)	Summer 2009	Winter 2010	Winter 2011
NFL	54	63	75
NCAA Football	37	57	66
NCAA Men's Basketball	27	21	54
MLB	22	21	24
NCAA Women's Basketball	3	-6	19
Soccer	15	2	7
PGA Tour Golf	30	27	6
NHL	4	-6	2
NBA	14	8	-6
LPGA Tour Golf	0	-15	-13
NASCAR	36	38	-17
Indy Car Racing	2	-6	-35
Men's Tennis	-3	-20	-35
Women's Tennis	-3	-23	-35
Horse Racing	-14	-37	-36
WNBA	-14	-30	-49
Boxing	-37	-52	-67



The NFL and NCAA Football had the greatest net increase, followed by NCAA Men's Basketball, MLB, and NCAA Women's Basketball

League Commissioners and NCAA Attitudes

Approval Rating for Commissioners



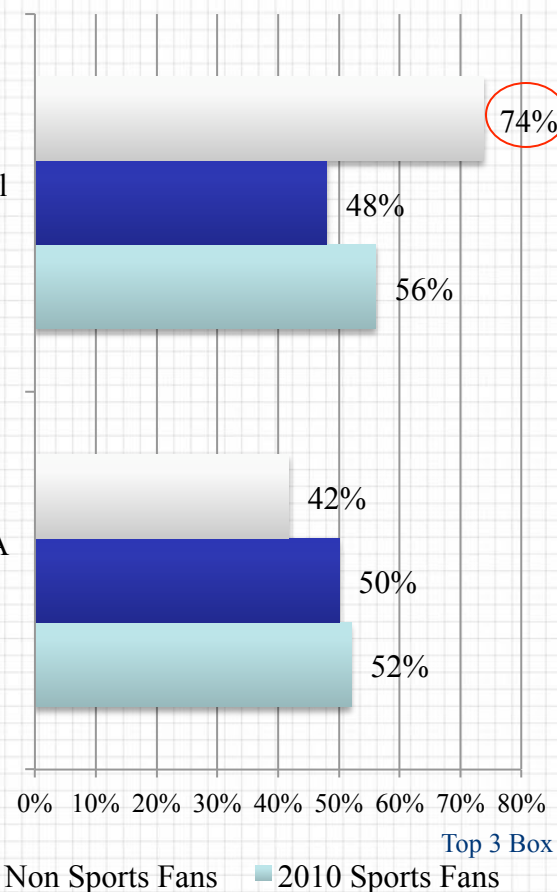
Winter 2011 Winter 2010 Summer 2009



NCAA Attitudes

There are too many college bowl games

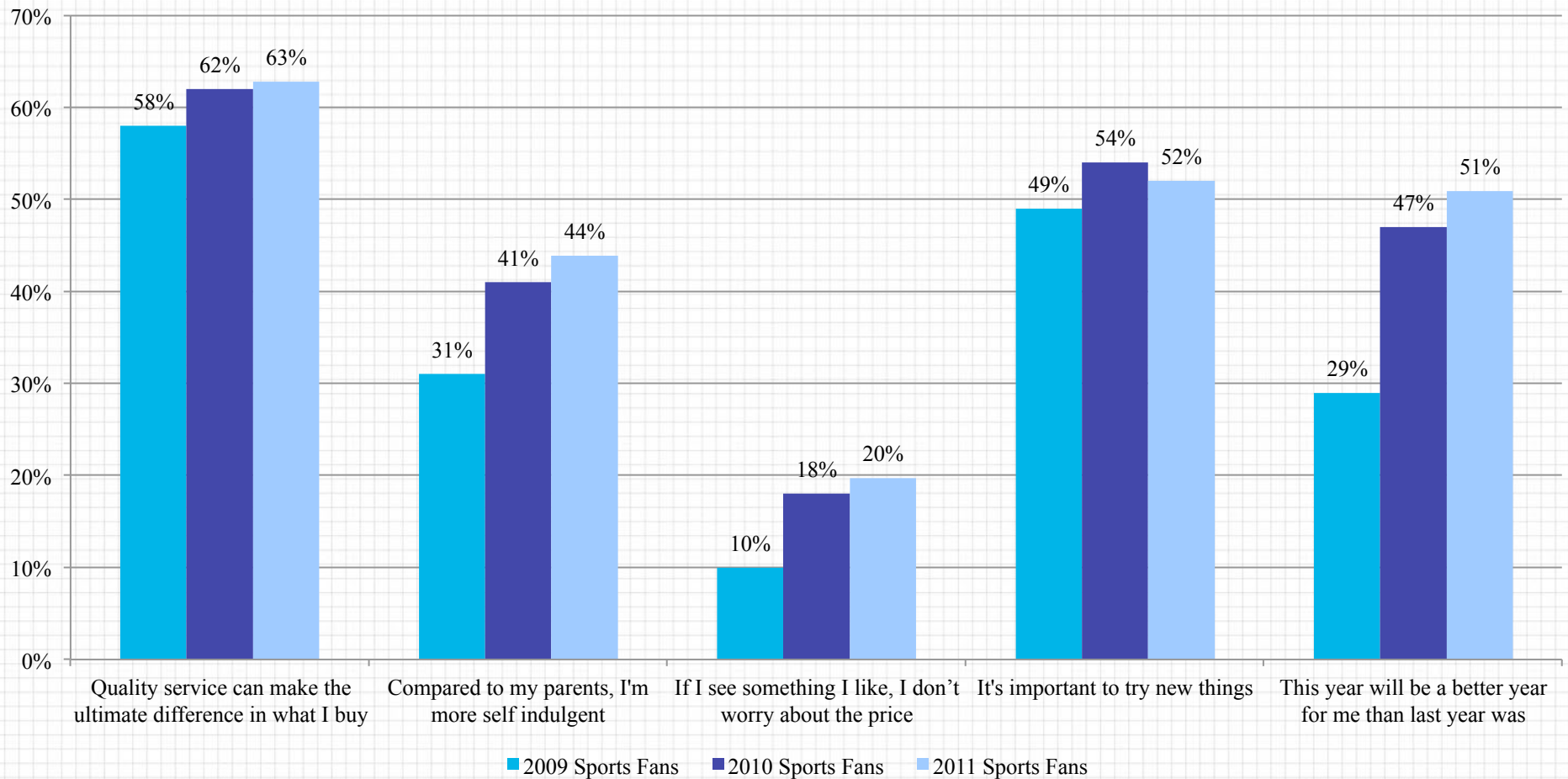
College coaches who violate NCAA recruiting regulations should be banned from coaching



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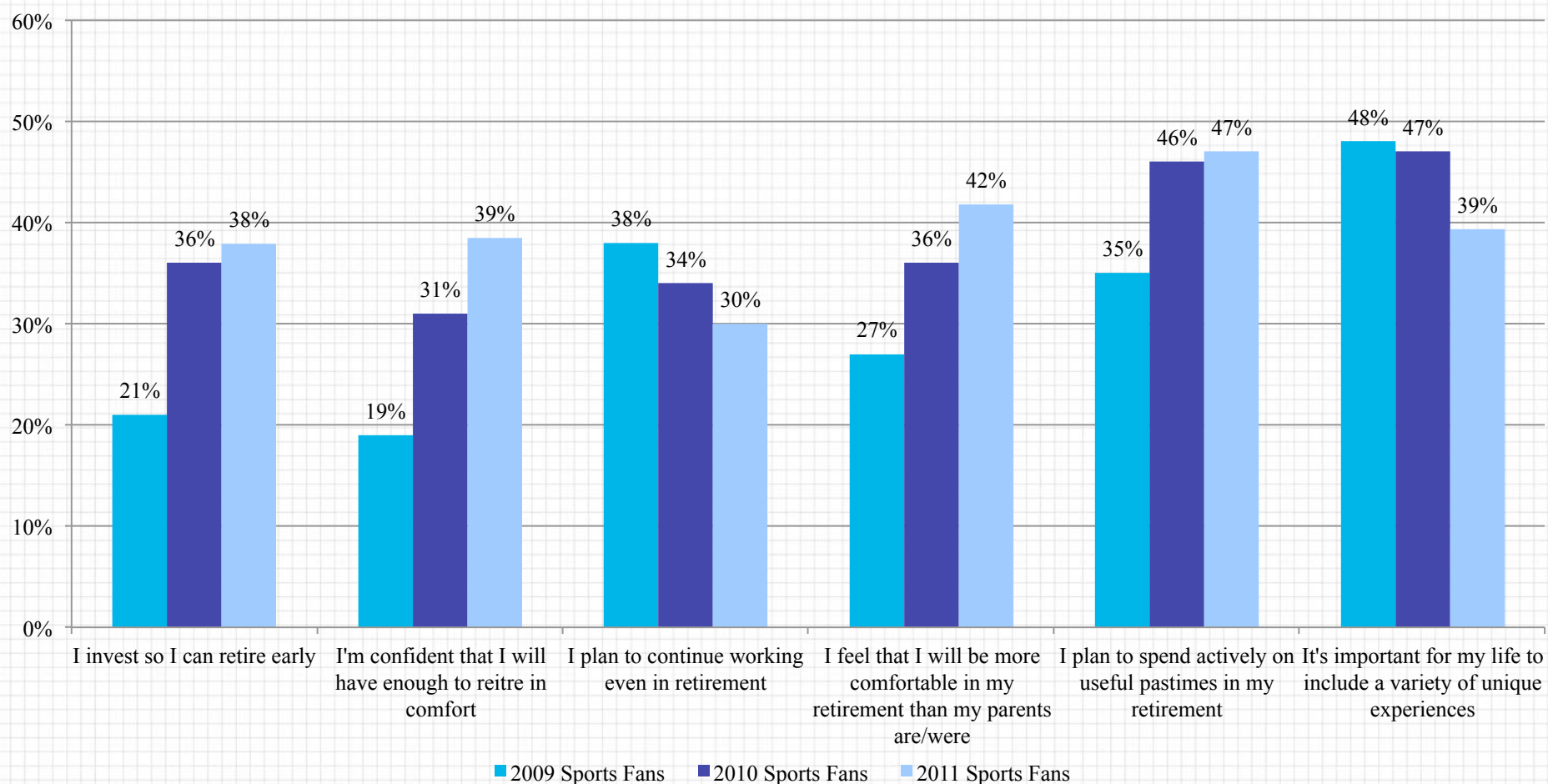
2011 Sports Fans 2010 Non Sports Fans 2010 Sports Fans

Sports Fans Look for Service as Differentiator While Showing Slight Uptick in Optimism



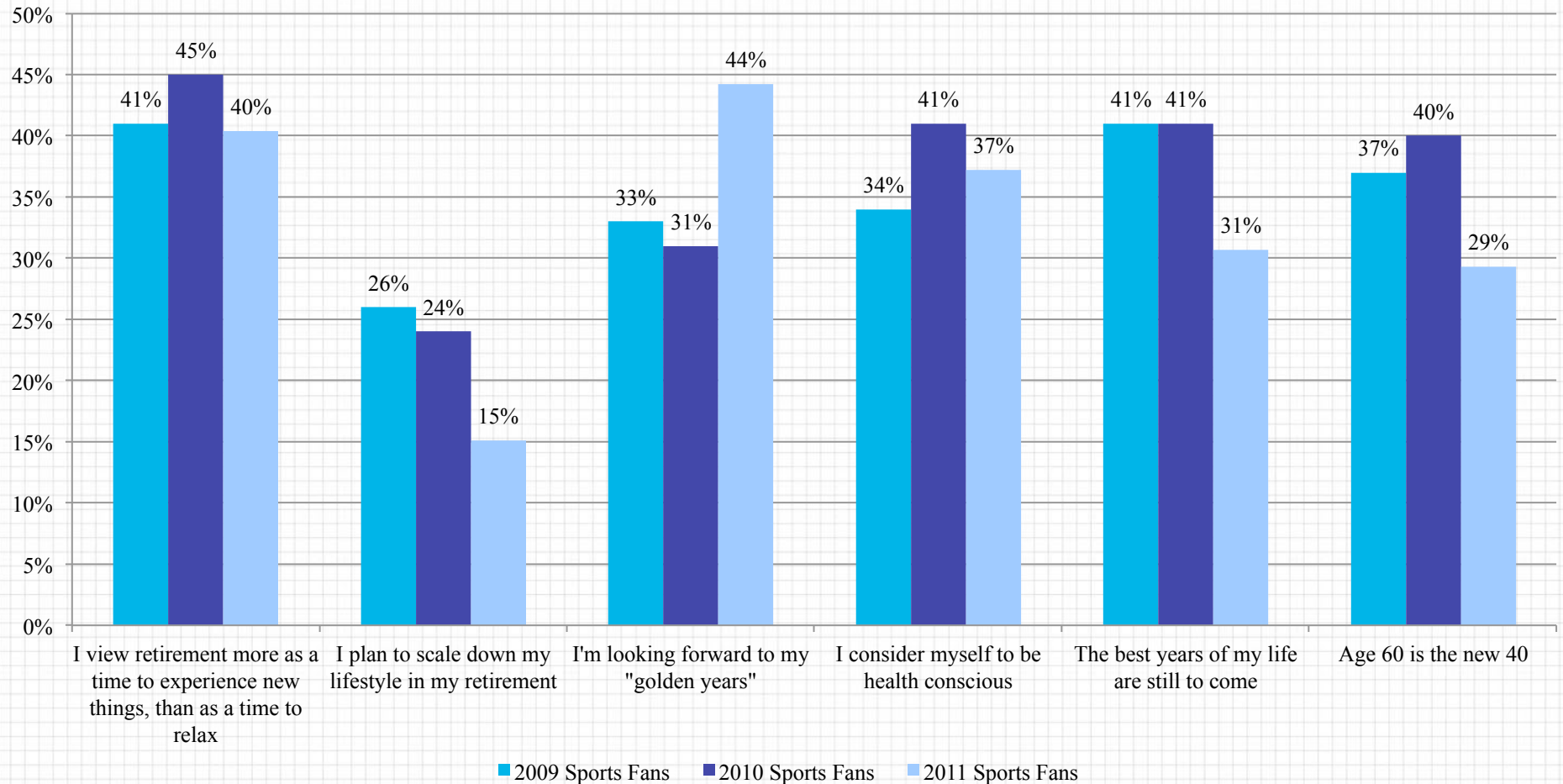
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...Retirement Prospects Appear Less Daunting!



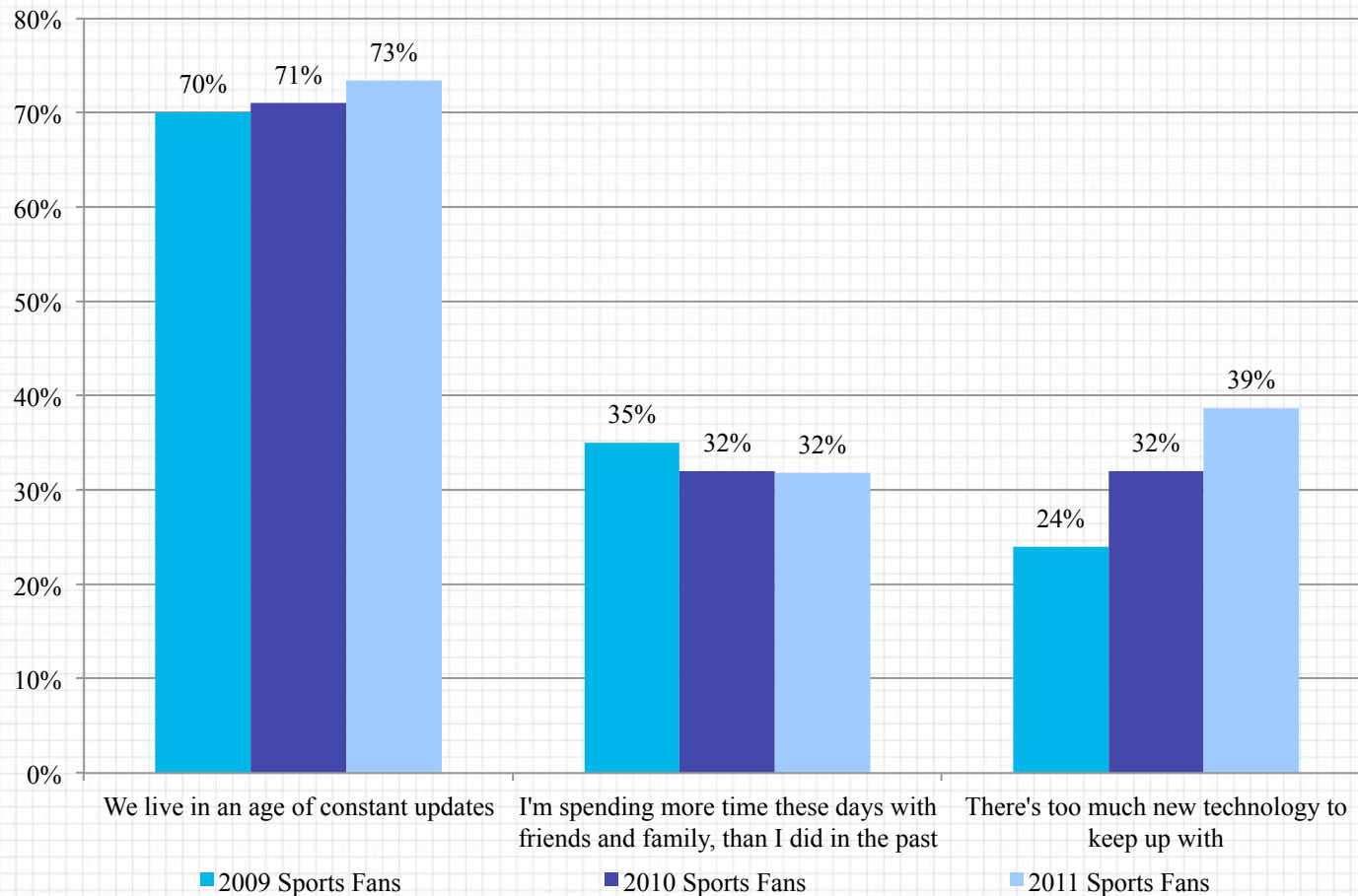
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But the Future is a Mixed Bag, When it Comes to Experiential Optimization



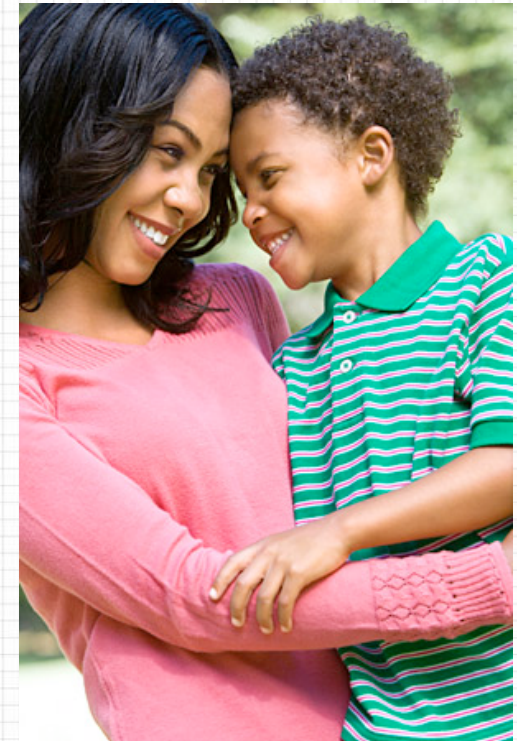
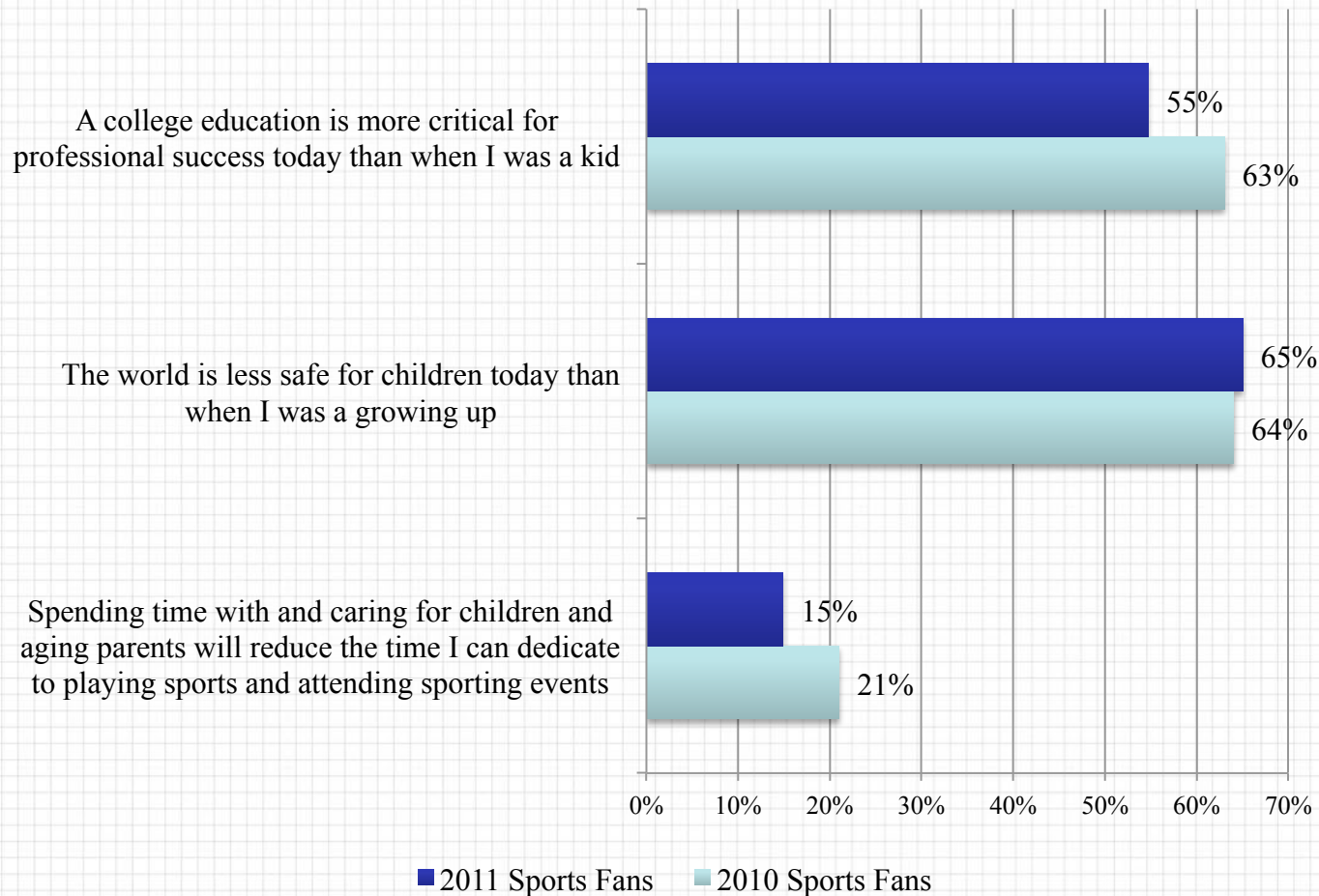
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..As Sports Fans are Still Stressed and Trying to Balance Their Lives!



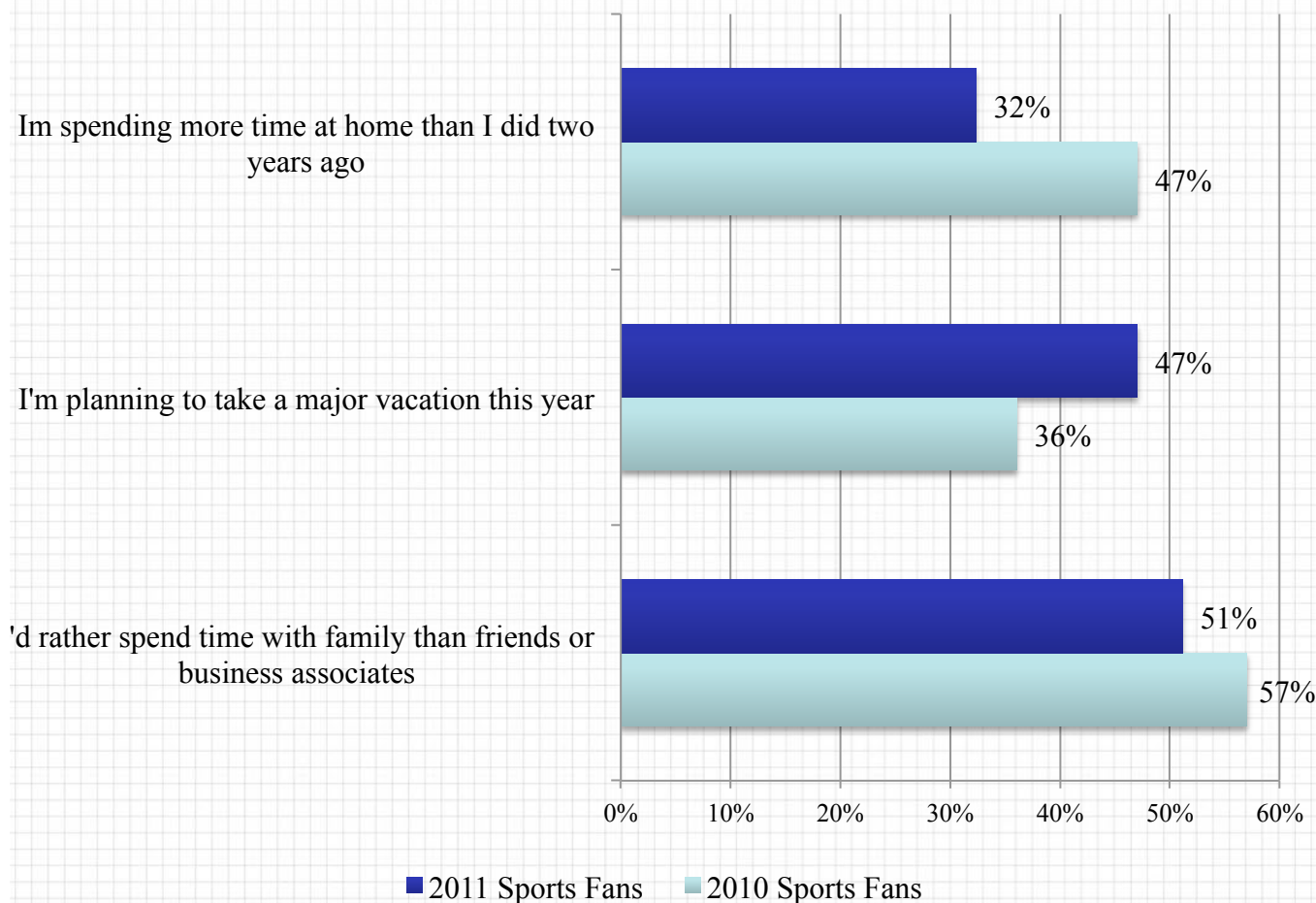
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Sports Fans are Starting to Emerge from the cocoon, But “Child Centricity” is Still Acute



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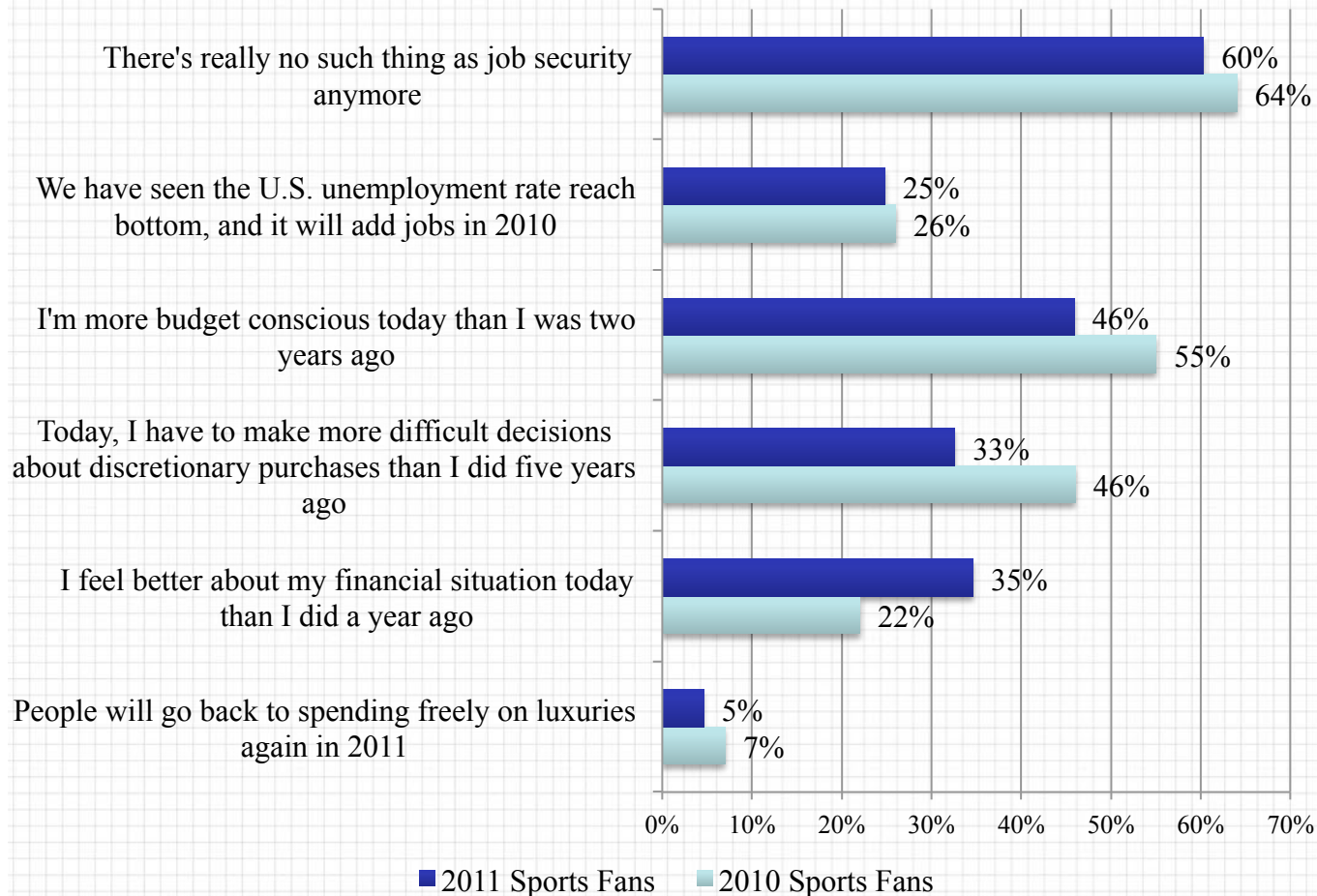
Greater Intent to Spend Time out of home and with Business Associates! Is the Hangover Lifting?



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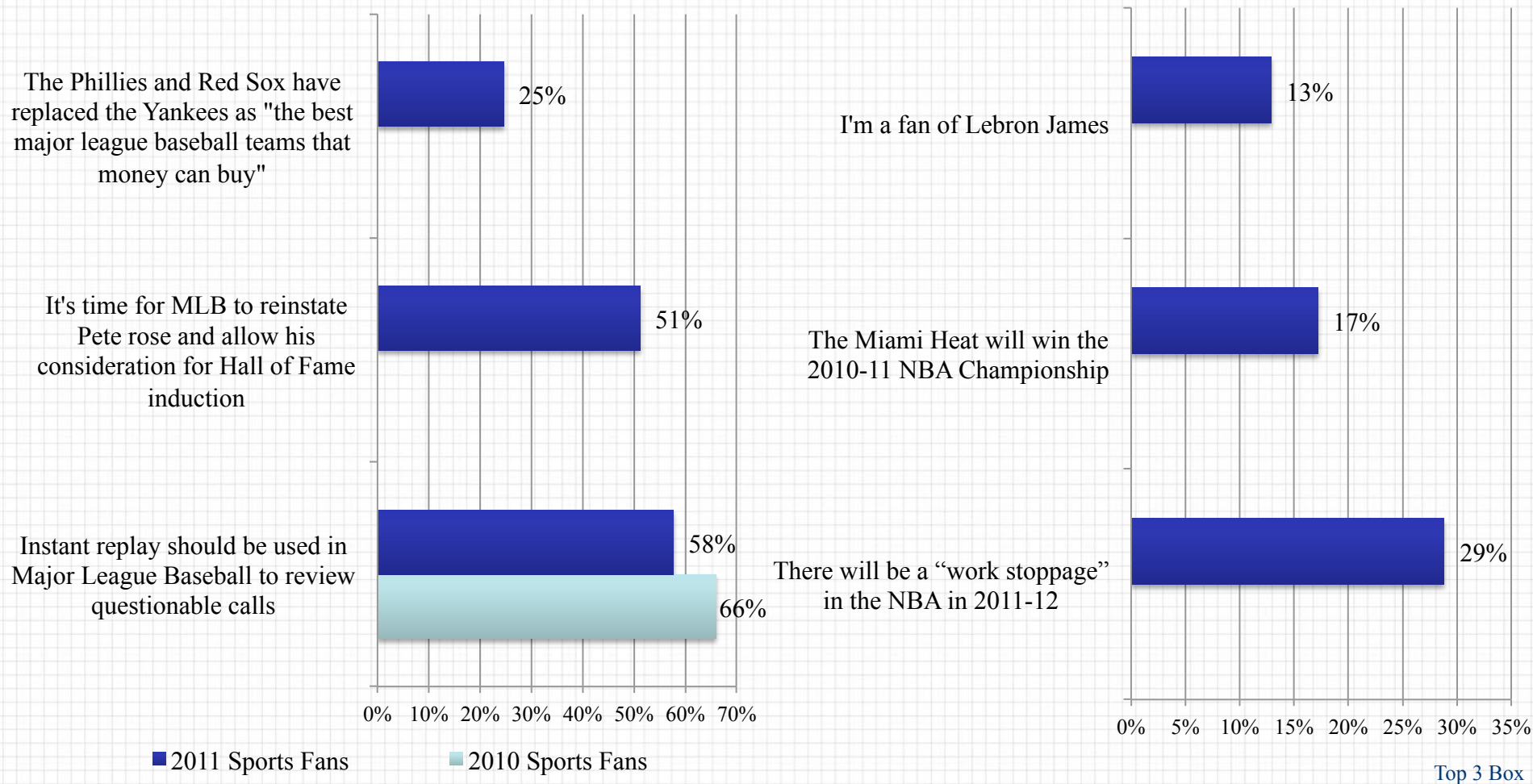
Economic Concerns Linger...But Sports Fans Perceive Themselves to Be In Better Shape Than Others

Getty Images

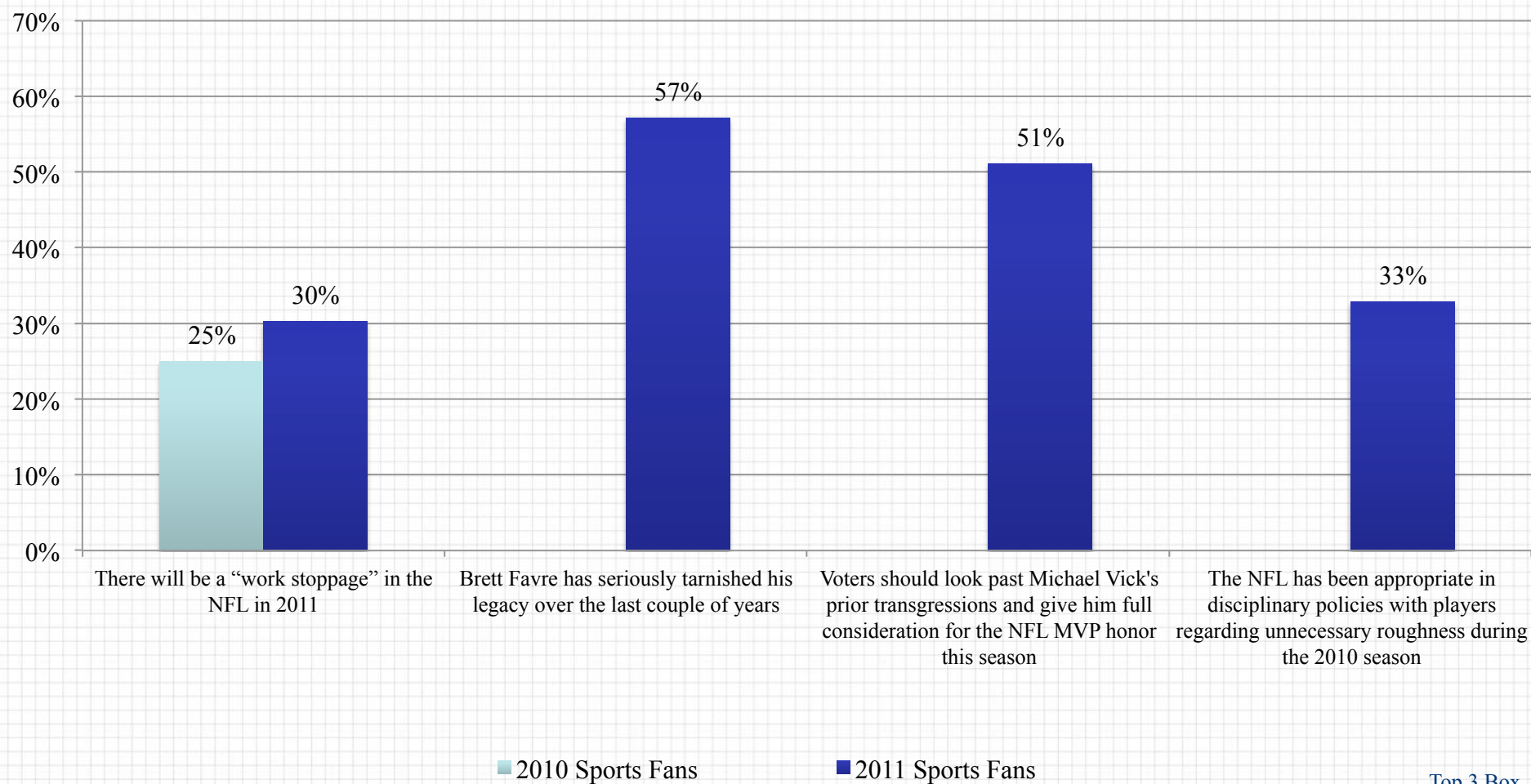


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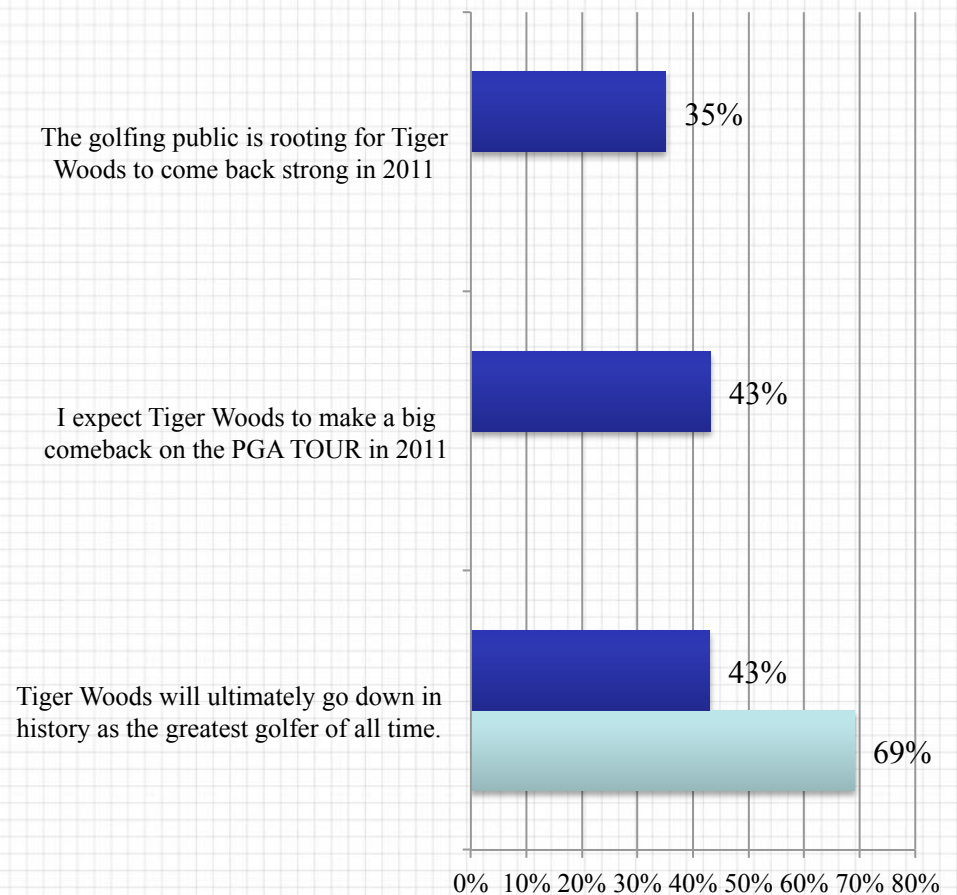
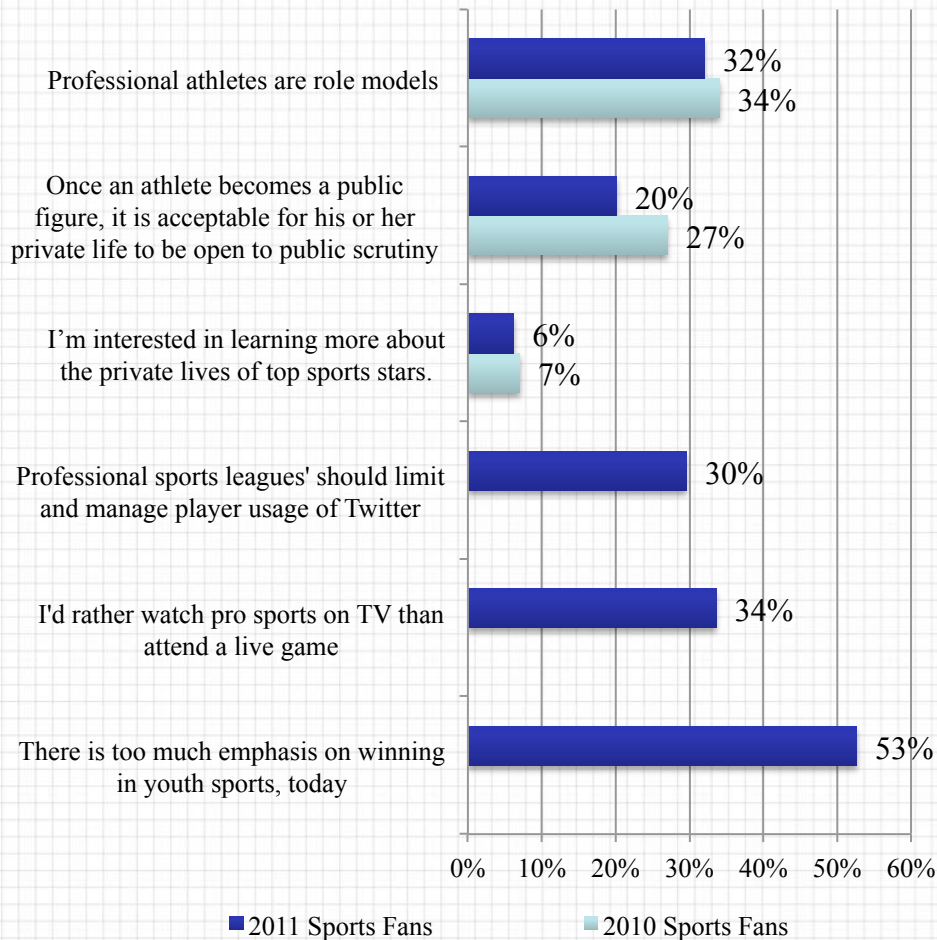
No Love For LeBron; Confidence in Positive NBA Labor Outcome; Yankees are still MLB's Mercenaries



NFL Topical Issues—Growing, but not Overwhelming Concern for a Work Stoppage!



Perceptions: On Field Matters More than Off the Field; OnSite Fan Experience Bests TV; Tiger Comeback?



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