



# THE SPORTS FAN MINDSET

## — 2013 —

**SPORTS &  
LEISURE**  
RESEARCH GROUP



February 2013

## Two Minute Take-Aways

- NFL, NCAA Football and MLB remain the three most popular sports, while soccer, NCAA Basketball and the NBA Trend upwards. MMA resonates
- Boxing and WNBA still suffer from perceptions of waning popularity
- Running/Jogging, Cycling, basketball and Diamond sports surge as recreational sports; Walking still most prevalent
- NCAA Fans fear for the future vitality of the Big East Conference and are still underwhelmed by the proliferation of bowl games.
- MLB Fans are less enamored with expanded playoffs and don't buy into the Blue Jays in 2013
- While Commissioner Bettman's reputation takes a major hit from the work stoppage, there are encouraging signs that fan enthusiasm will continue to build for the NHL



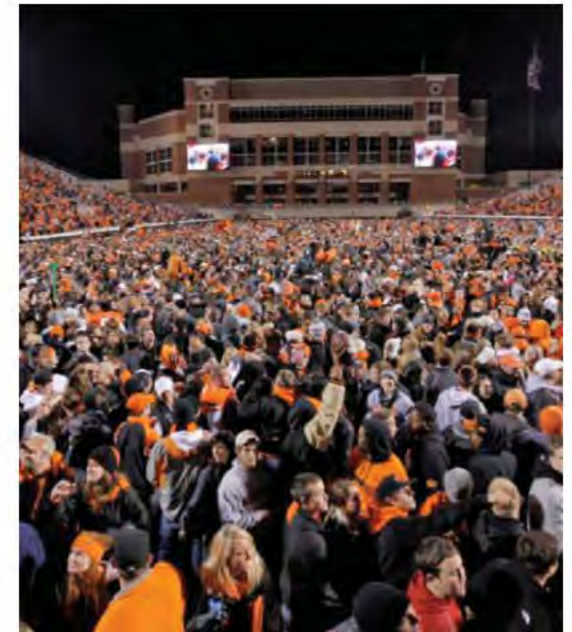
## Two Minute Take-Aways (continued)

- Amidst growth in NBA popularity, fans see more competitive balance and begin to warm to LeBron James and the Miami Heat
- A Contradiction in Terms: Concussions are a serious issue for NFL fans, but a significant number would choose an NFL career, even if it meant permanent brain damage
- With such strong overall NFL ratings, fans balk at change; Luck is top new QB
- Fans place a greater value on the in venue sports experience, while the bloom continues to come off athletes as role models
- A focus on the family remains ubiquitous, as sports fans' personal economic outlook takes a slightly optimistic turn.
- But service, variety and frugality remain key sports fan needs in an environment defined by 24/7 information bombardment, constant technological evolution and lingering concerns for the economy at large

# THE SPORTS FAN MINDSET 2013

## Background, Objectives and Methodology

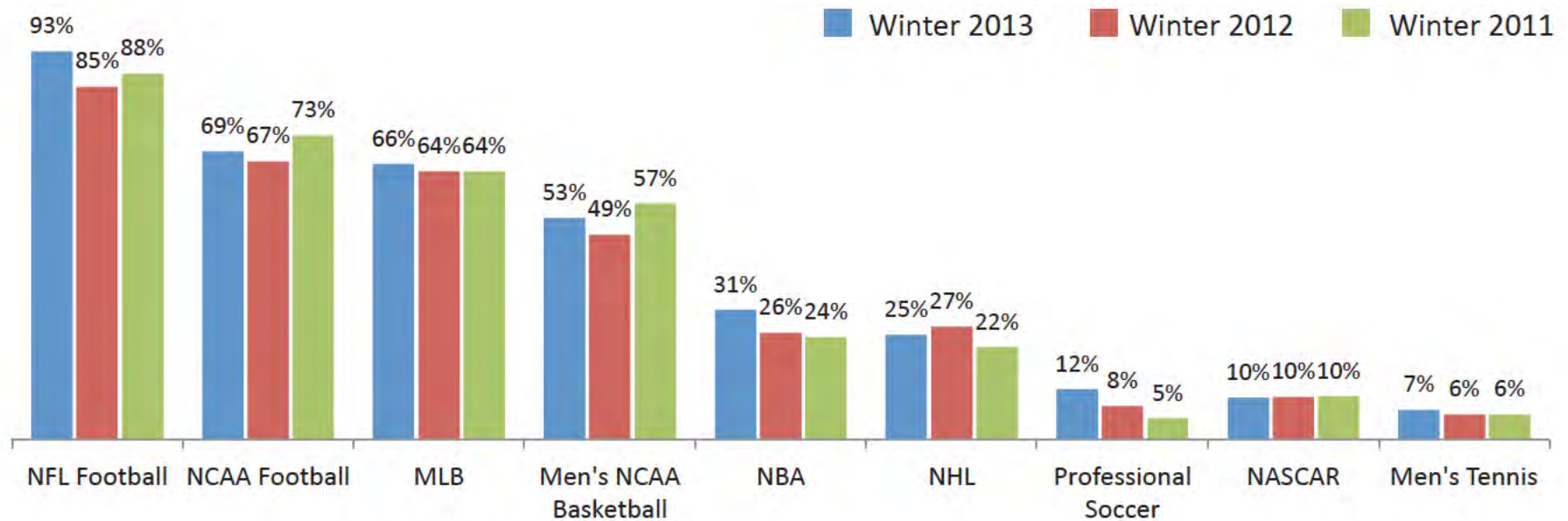
- Winter 2013 SLRG Sports Omnibus
  - Assess the attitudes and perceptions of American sports fans
- Initiated by Sports and Leisure Research Group in 2009
- 2013 online survey of over 1,500 total respondents



# THE SPORTS FAN MINDSET 2013

NFL, NCAA Football and MLB Maintain Top Three Spots; Soccer Continues Popularity Surge While NCAA Hoops and NBA Trend Upward

Q I watch and follow \_\_\_\_\_ closely

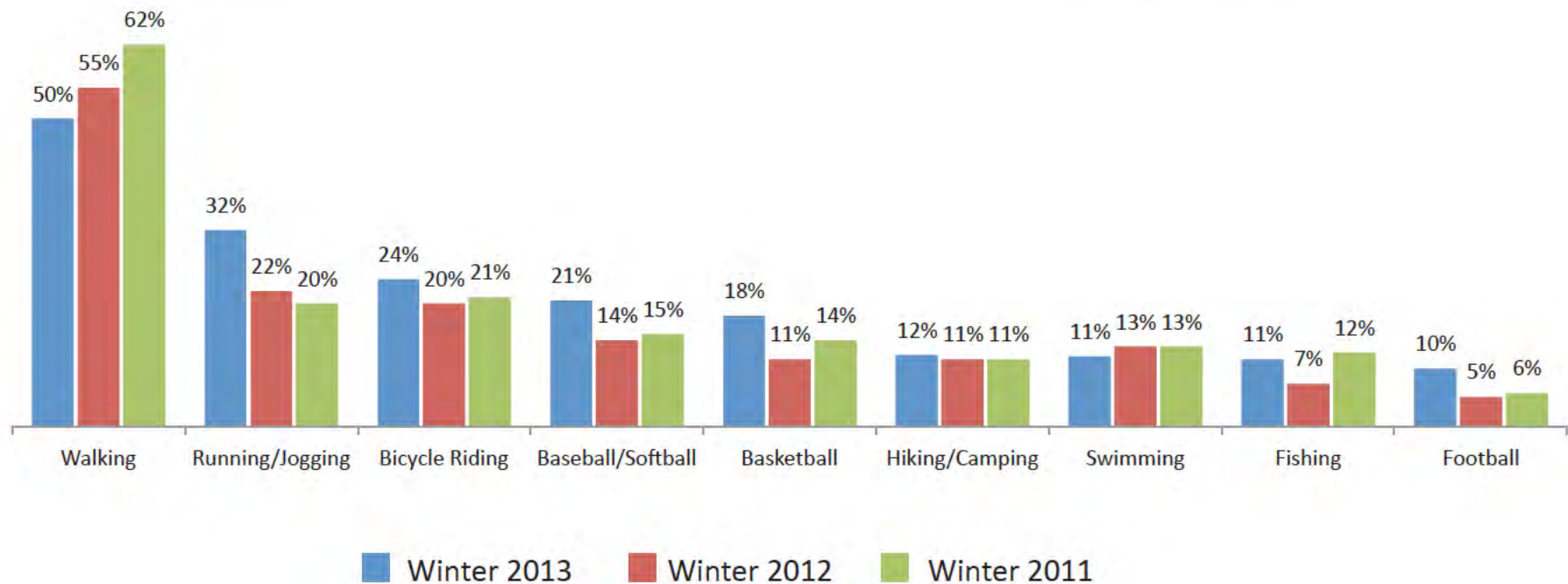




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## Recreational Sports Participation: Running/Jogging, Cycling, Basketball and Diamond Sports Surge as Recreational Sports; Walking Still Most Prevalent

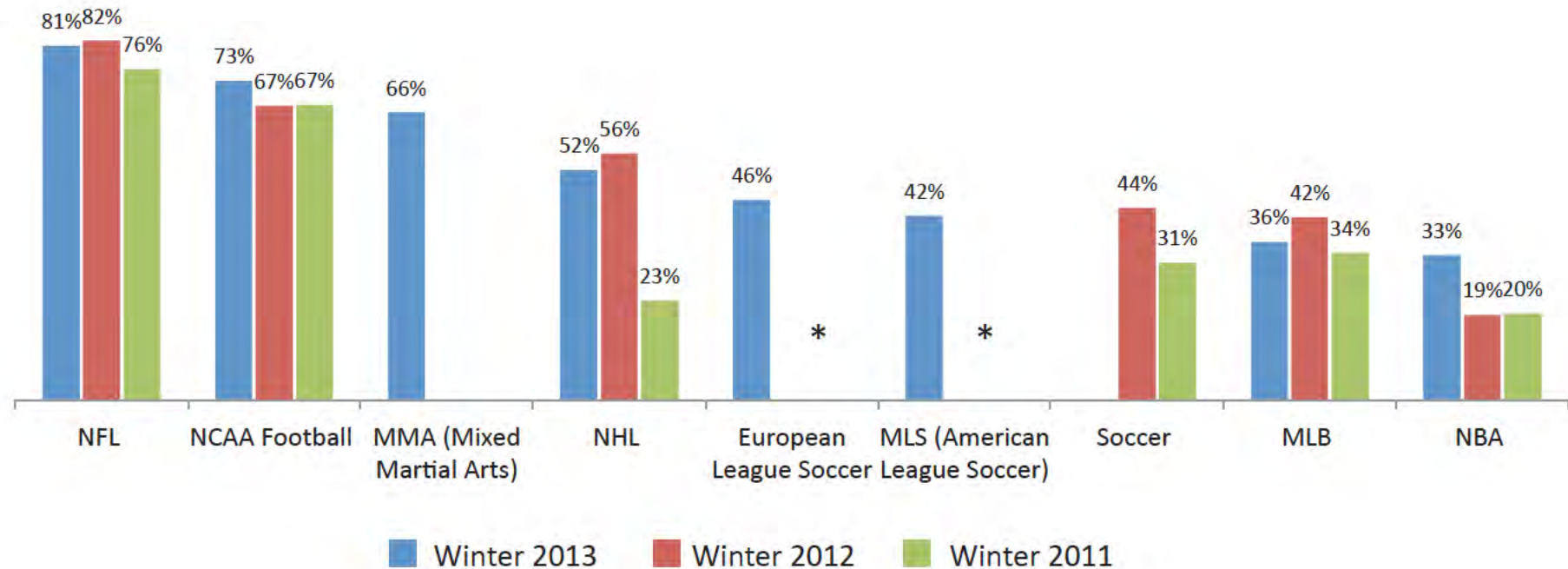
Q Which of the following sports do you participate in regularly, that is at least twice per month during season?



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## Perceived Popularity of Professional Sports: NCAA Football, MMA, NBA Surging

Q Please indicate whether you think this sport has become more popular

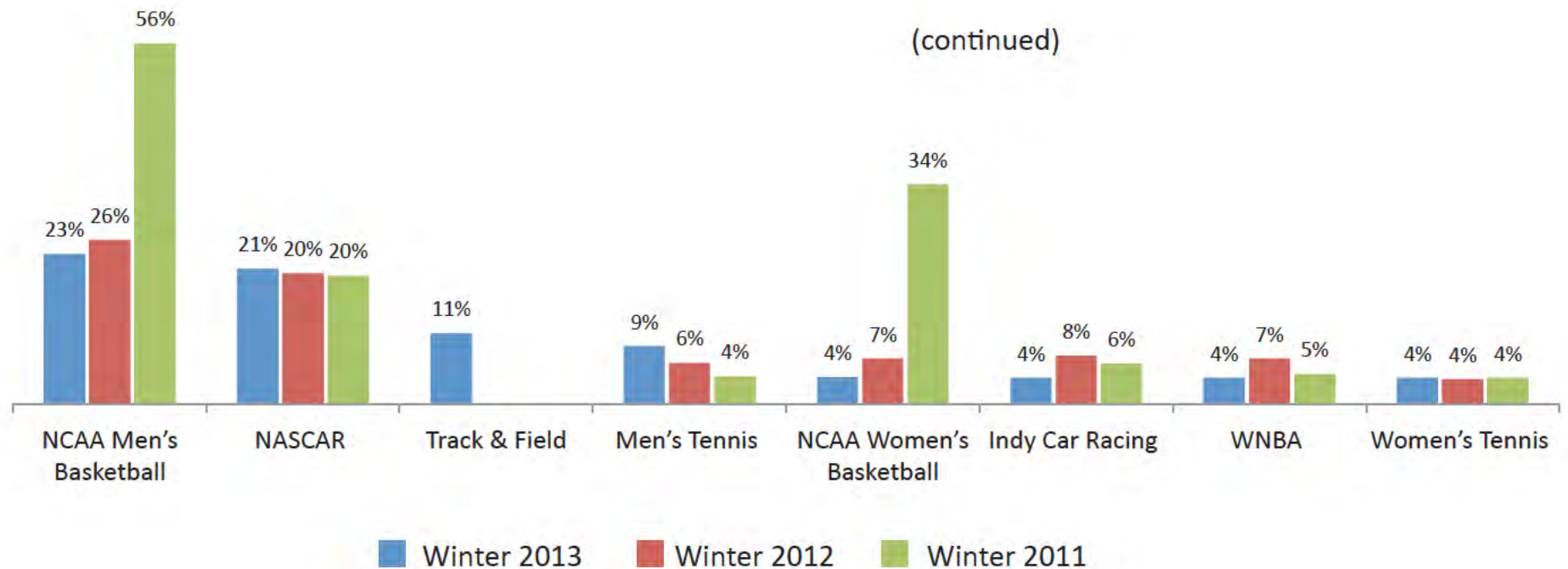


\*Asked as just "Soccer" in 2011 and 2012

# THE SPORTS FAN MINDSET 2013

## Perceived Popularity of Professional Sports: NCAA Football, MMA, NBA Surging

Q Please indicate whether you think this sport has become **MORE** popular

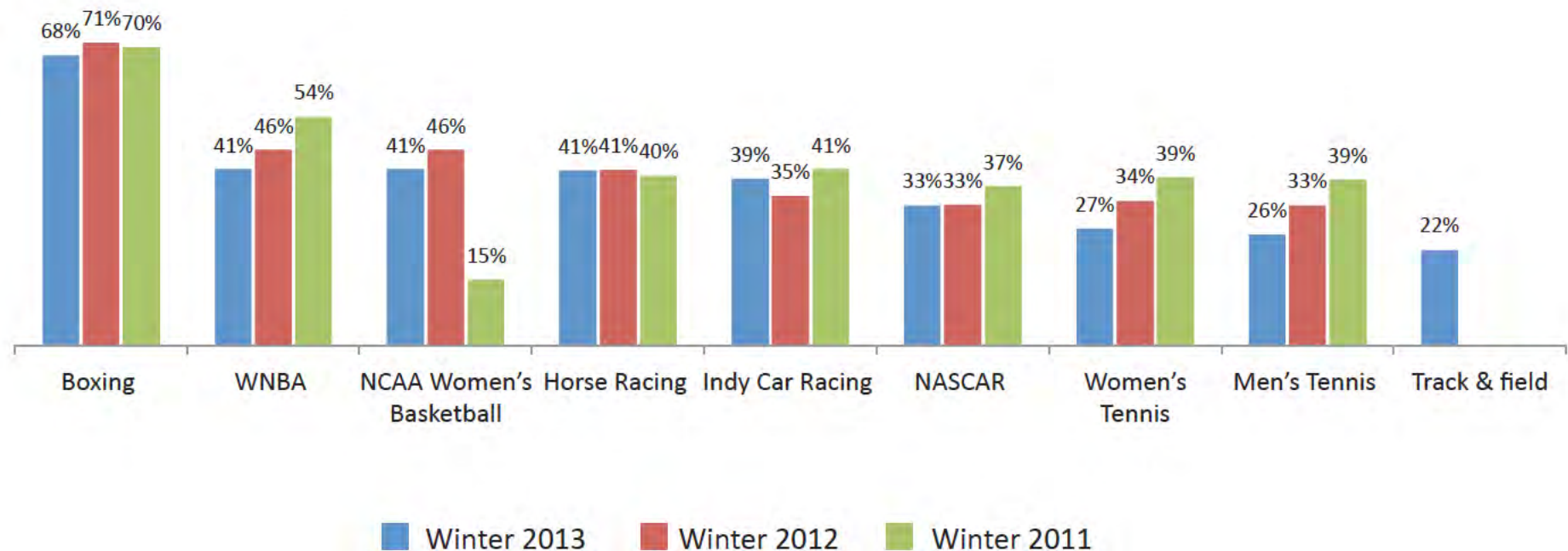




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Hierarchy is unchanged—Boxing and WNBA Still in relatively unenviable positions

Q Please indicate whether you think this sport has become **LESS** popular

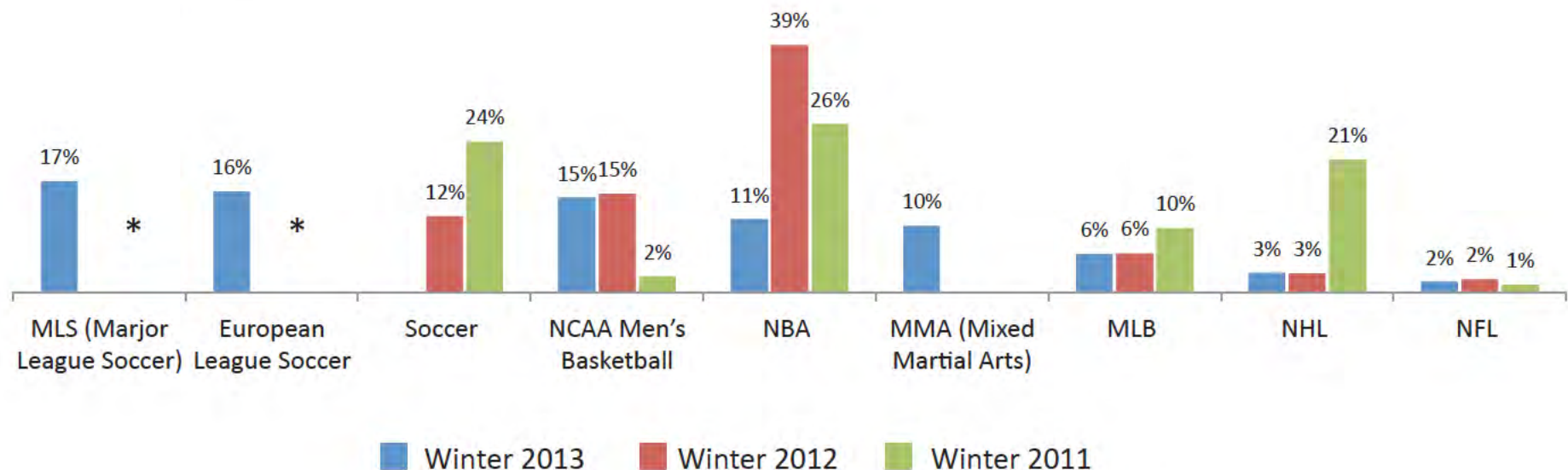


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Hierarchy is unchanged—Boxing and WNBA Still in relatively unenviable positions

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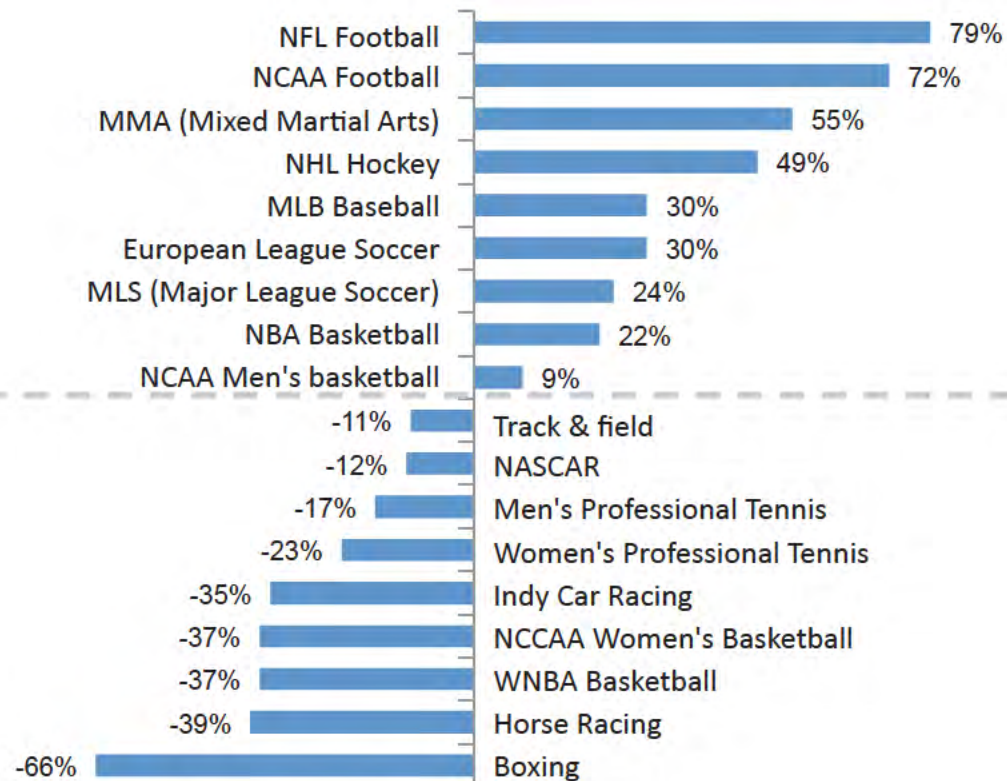
(continued)



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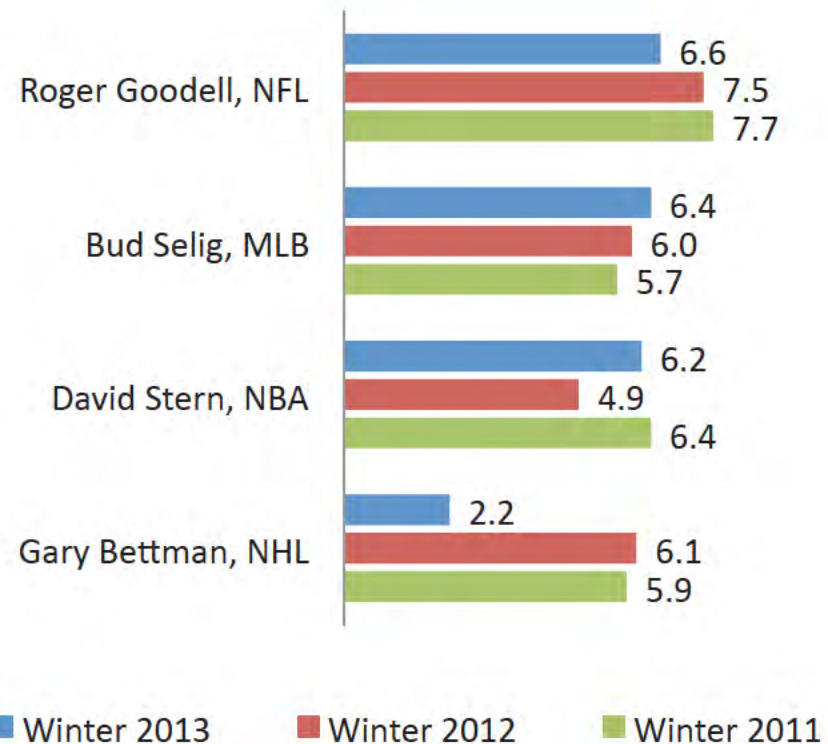
Difference Between Those Who Say A Sport is Gaining vs. Losing Popularity: NFL, NCAA Football, and MMA are seeing the greatest gains in popularity





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## Approval Ratings on Commissioners: Bettman takes major hit in aftermath of lockout



# THE SPORTS FAN MINDSET 2013

## Topical Issues: NCAA Attitudes



TOP 3 BOX SUMMARY	2013 Sports Fans	2012 Sports Fans	2011 Sports Fans
There are too many college bowl games	69%	76%	74%
The Four team BCS Playoff will be a great solution towards determining the best team in NCAA College Football	43%		
The Big East will survive as a thriving conference in NCAA sports	3%		



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**Topical Issues:** MLB Fans less enamored with expanded playoffs and not buying Blue Jays in 2013



TOP 3 BOX SUMMARY	2013 Sports Fans	2012 Sports Fans	20 11 Sports Fans
I wish that MLB could find a way to keep star players on their original teams for more of their careers	50%	55%	
The expansion of the playoffs and realignment of divisions has been good for Major League Baseball	29%	40%	
The Toronto BlueJays will win the 2013 World Series	2%		



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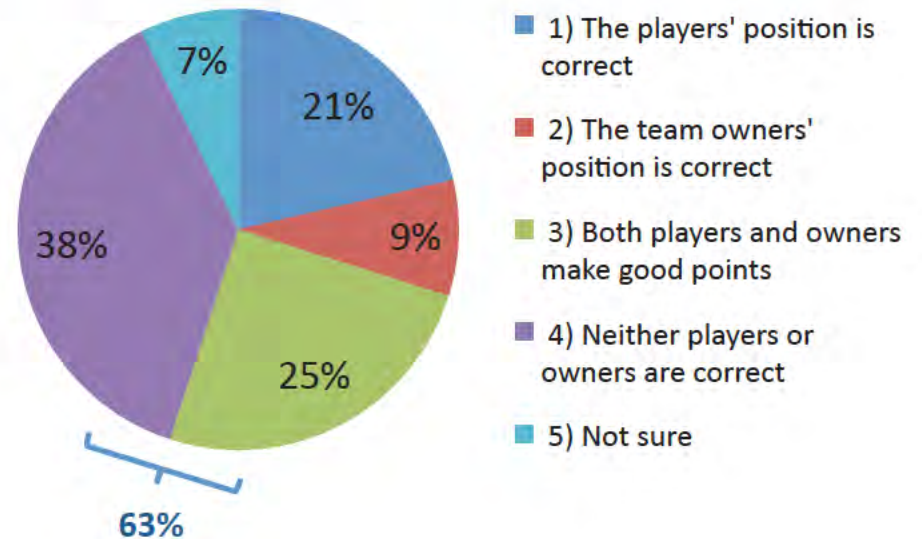
## Topical Issues: NHL – Play on!



The labor struggles in the NHL make me less likely to want to attend a game

	Count	Percent	
1) Strongly Disagree 1	46	14.47%	} 29.88%
2) 2	23	7.23%	
3) 3	26	8.18%	
4) 4	11	3.46%	
5) 5	34	10.69%	} 44.97%
6) 6	16	5.03%	
7) 7	19	5.97%	
8) 8	31	9.75%	
9) 9	35	11.01%	
10) Strongly Agree 10	77	24.21%	

Q Which of the following best represents your opinion in assessing the recent labor issues in professional hockey?



Base: Those who "watch hockey closely")

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Topical Issues: Competitive balance growing while LeBron gains fans



TOP 3 BOX SUMMARY	2013 Sports Fans	2012 Sports Fans	20 11 Sports Fans
There aren't enough teams capable of winning a Championship in the NBA	37%	44%	
The Miami Heat will repeat as NBA Champions	33%	32%	17%
I'm a fan of LeBron James	24%	13%	13%



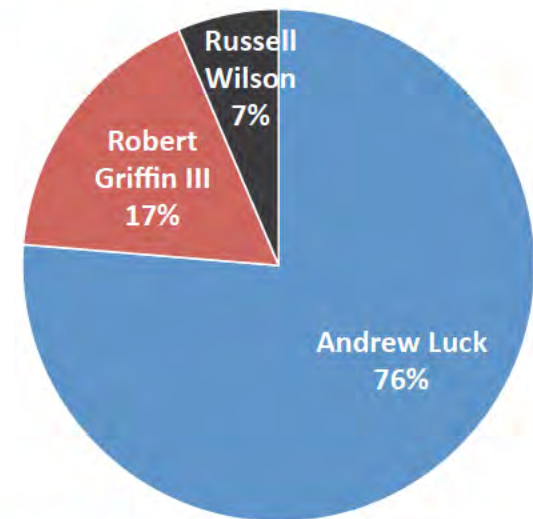
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**Topical Issues:** With such strong overall NFL ratings, fans balk at change; Luck is top new QB



TOP 3 BOX SUMMARY	2013 Sports Fans
The NFL was appropriate in its handling of the New Orleans Saints' "bounty" situation	23%
Expanding the number of teams that make the NFL playoffs is a good idea	10%
The elimination of kick-offs in the NFL would be a net positive for the game	2%

Q Who will have the better NFL career?

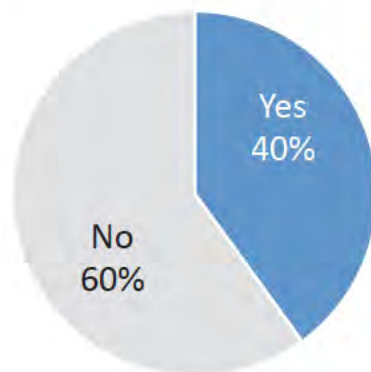




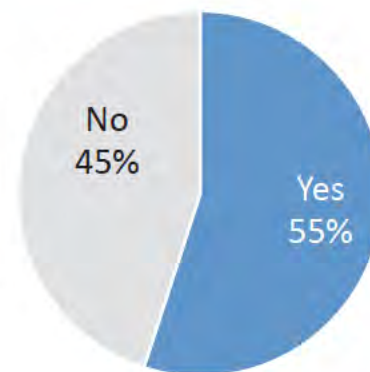
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**A Contradiction in Terms:** Concussions are a serious NFL issue, but a significant number would choose an NFL career, even if it meant permanent brain damage

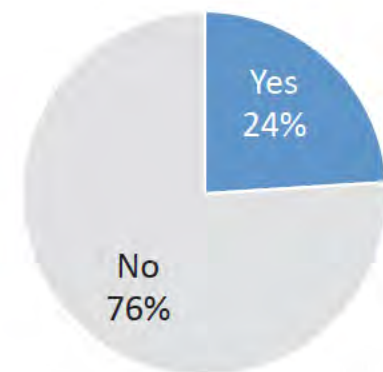
**Q** Assume for a moment, that a genie offers you the following proposition: You will be given the opportunity to live or re-live your life with the ability to become an All-Pro NFL player, recognized as one of the best at your position in the league and compensated accordingly. You will enjoy a lucrative 10 year career that enables you to retire from the game with both celebrity and lifetime financial security. However, at age 65, you will begin to show the onset of dementia. **Do you accept the genie's offer?**



Total



Age Under 35



Age 65+

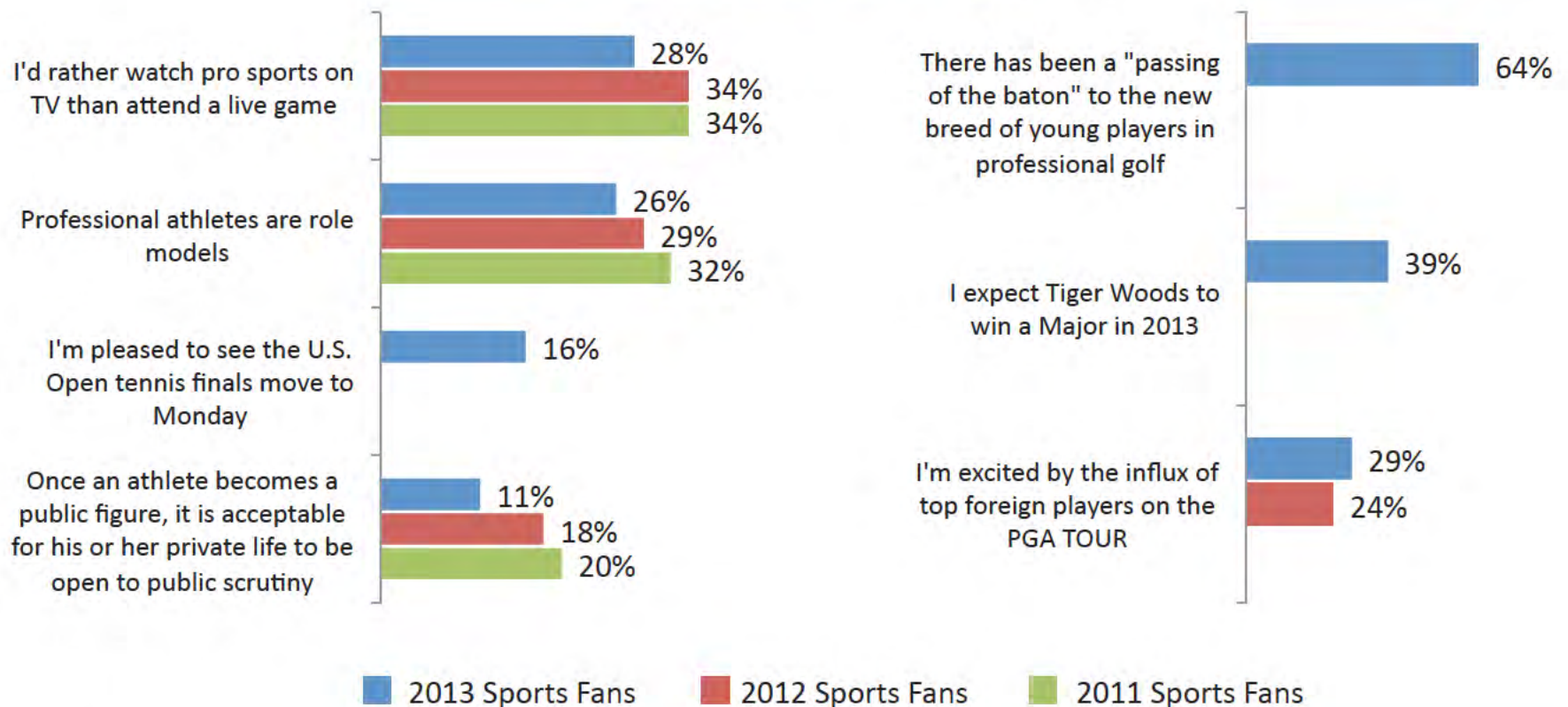
**83%** of Respondents Agree:

*"The issue of concussions in football is among the most serious problems that must be dealt with"*

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## Other Fan Attitudes: Greater Value Perceptions of the In Venue Sports Experience; the Bloom Continues to Come Off Athletes as Role Models

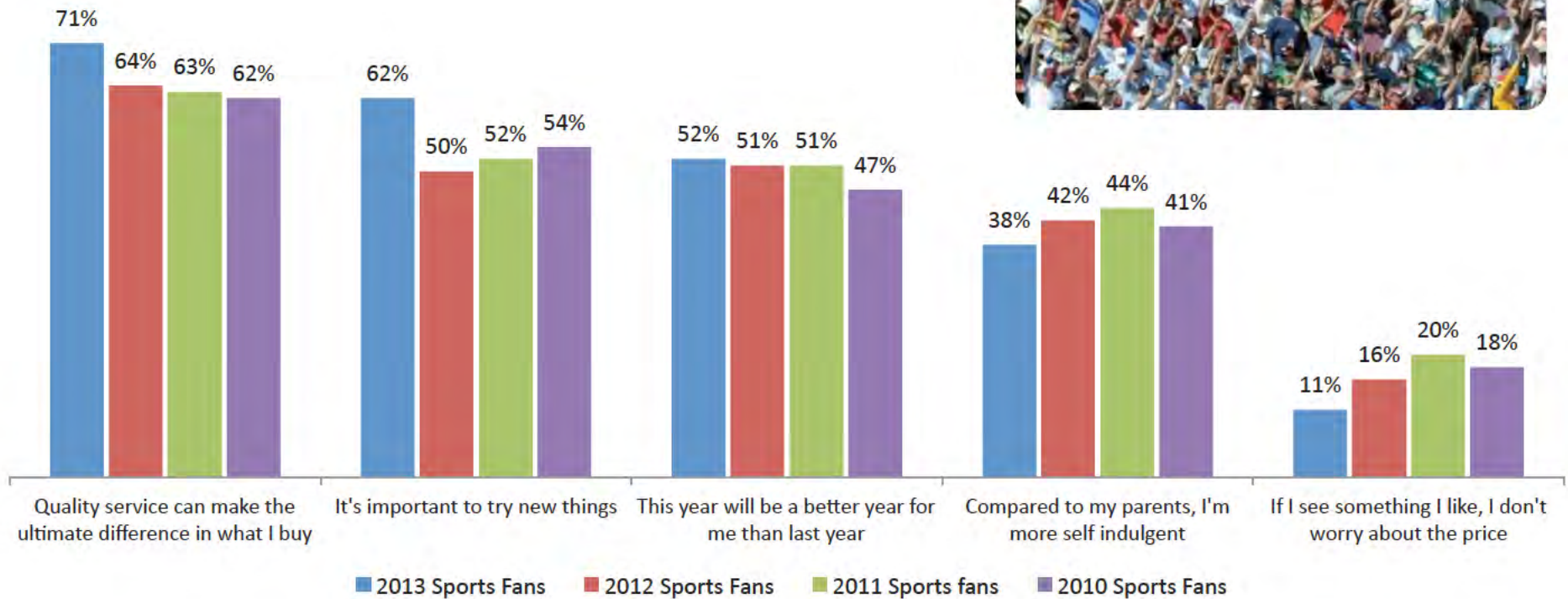
### Top 3 Box Summary





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## Sports Fan Attitudes: Service, Variety and Frugality

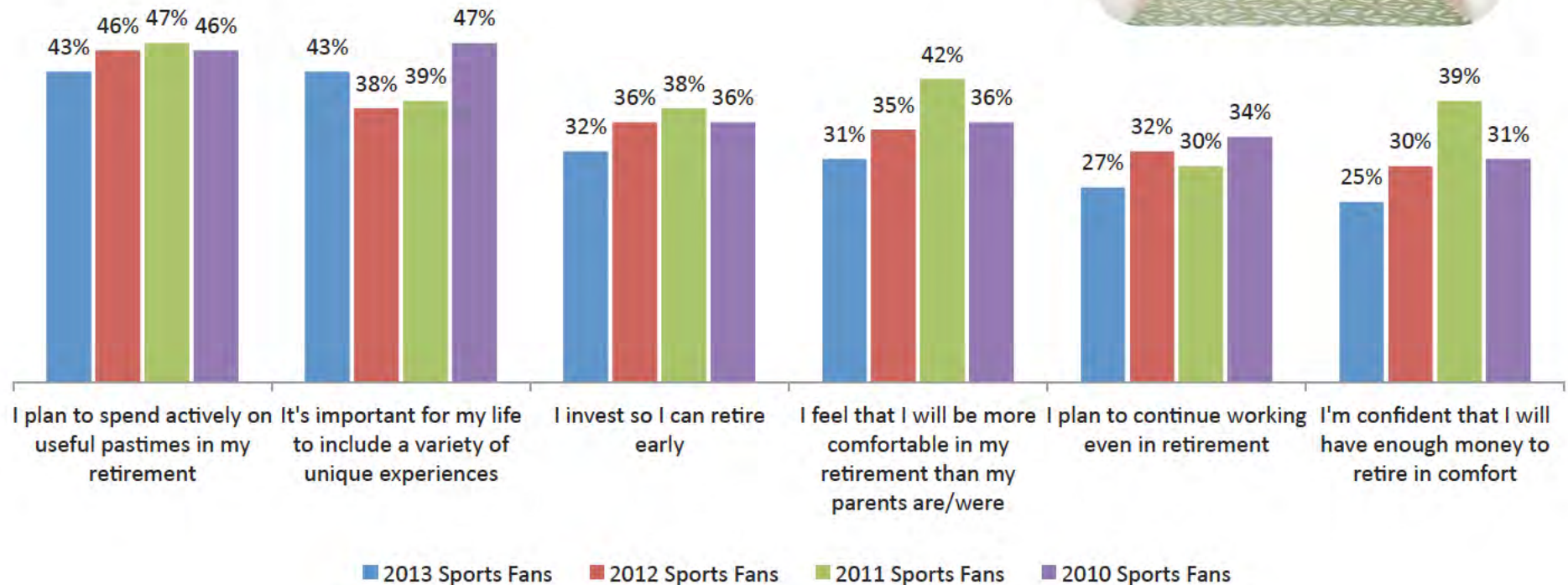


Top 3 Box Summary



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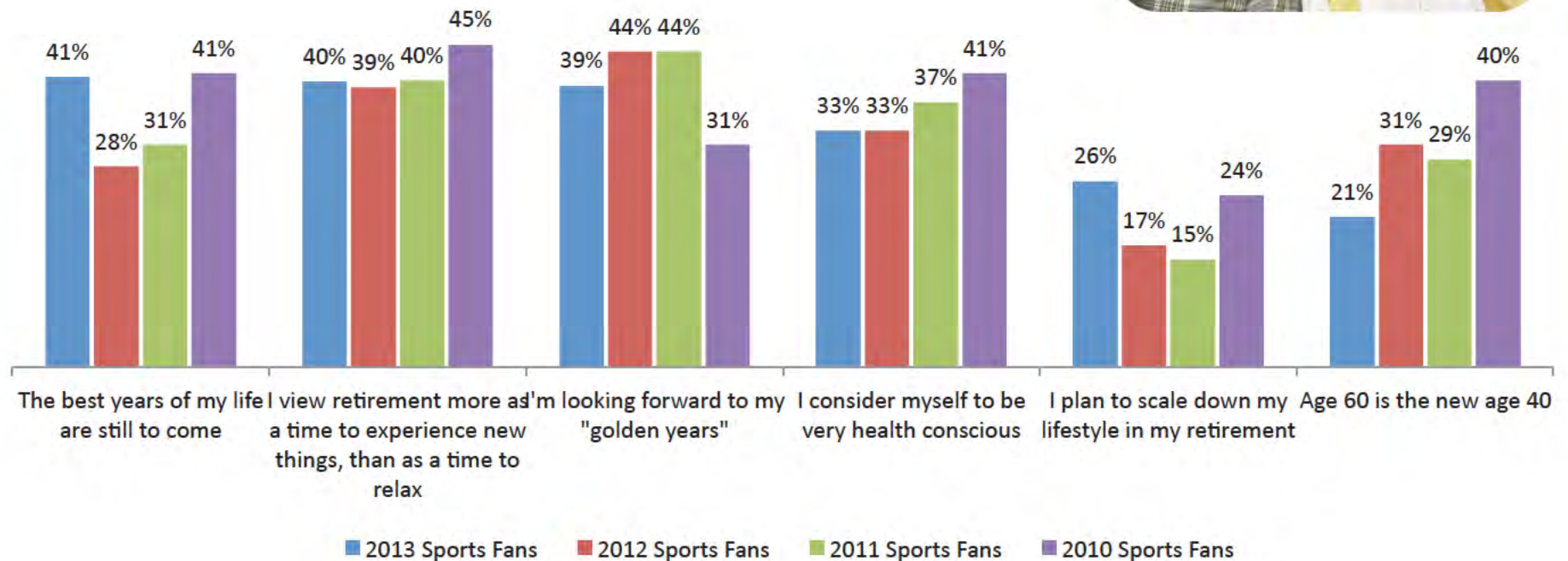
## Sports Fan Attitudes: Economic Concerns Linger



Top 3 Box Summary

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## Sports Fan Attitudes: Improved Future Optimism

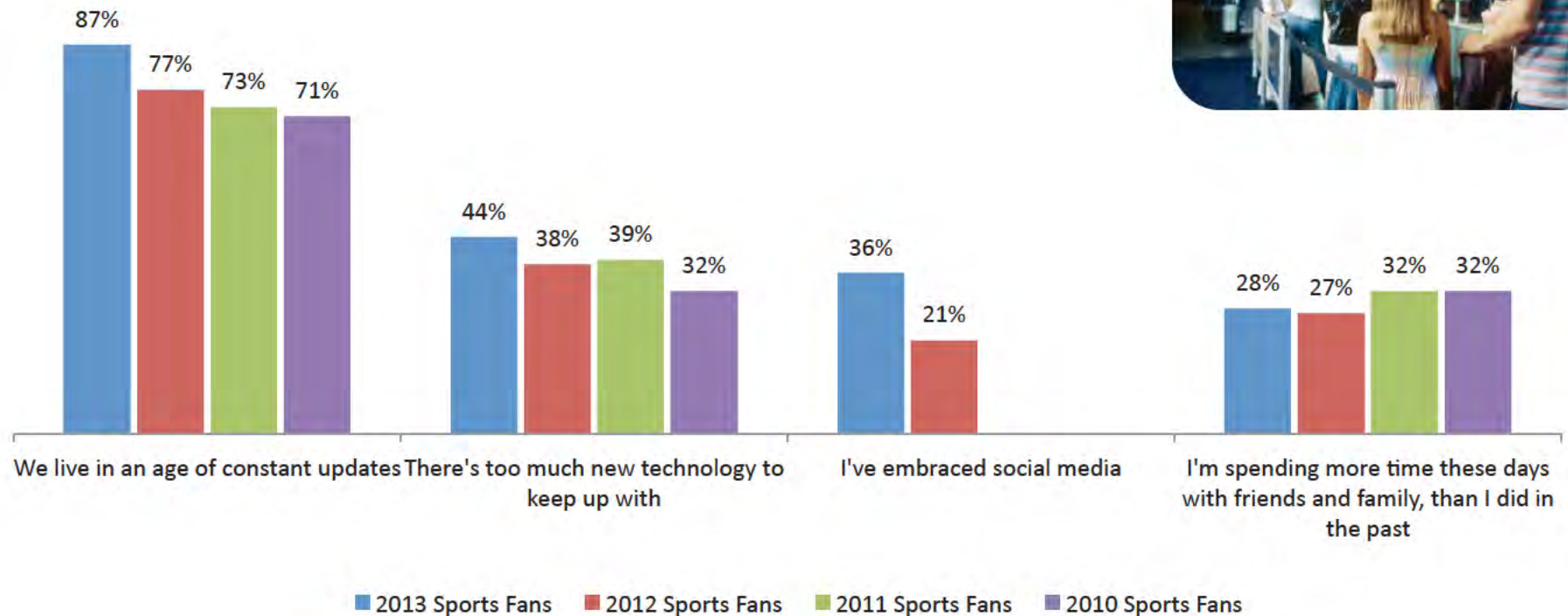


Top 3 Box Summary



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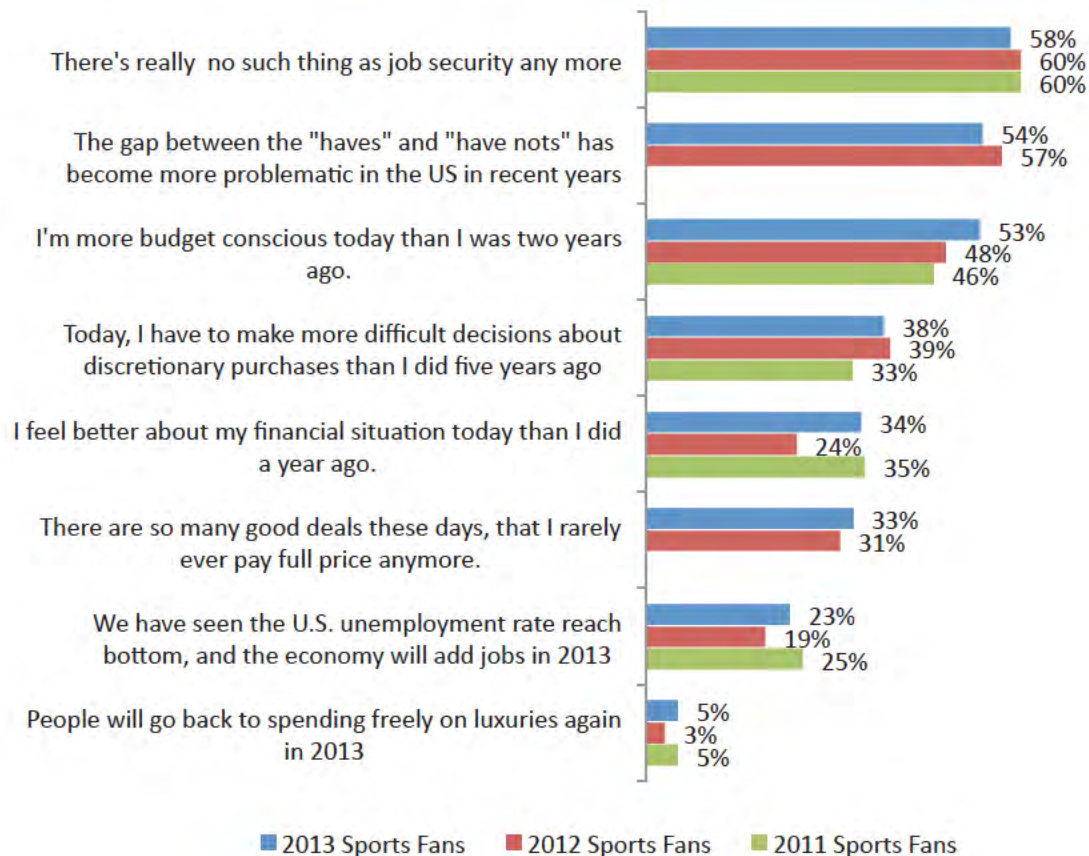
## Sports Fan Attitudes: No Stopping 24/7 Technology



Top 3 Box Summary

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## Sports Fan Attitudes: Slight Increase in Optimism for 2013

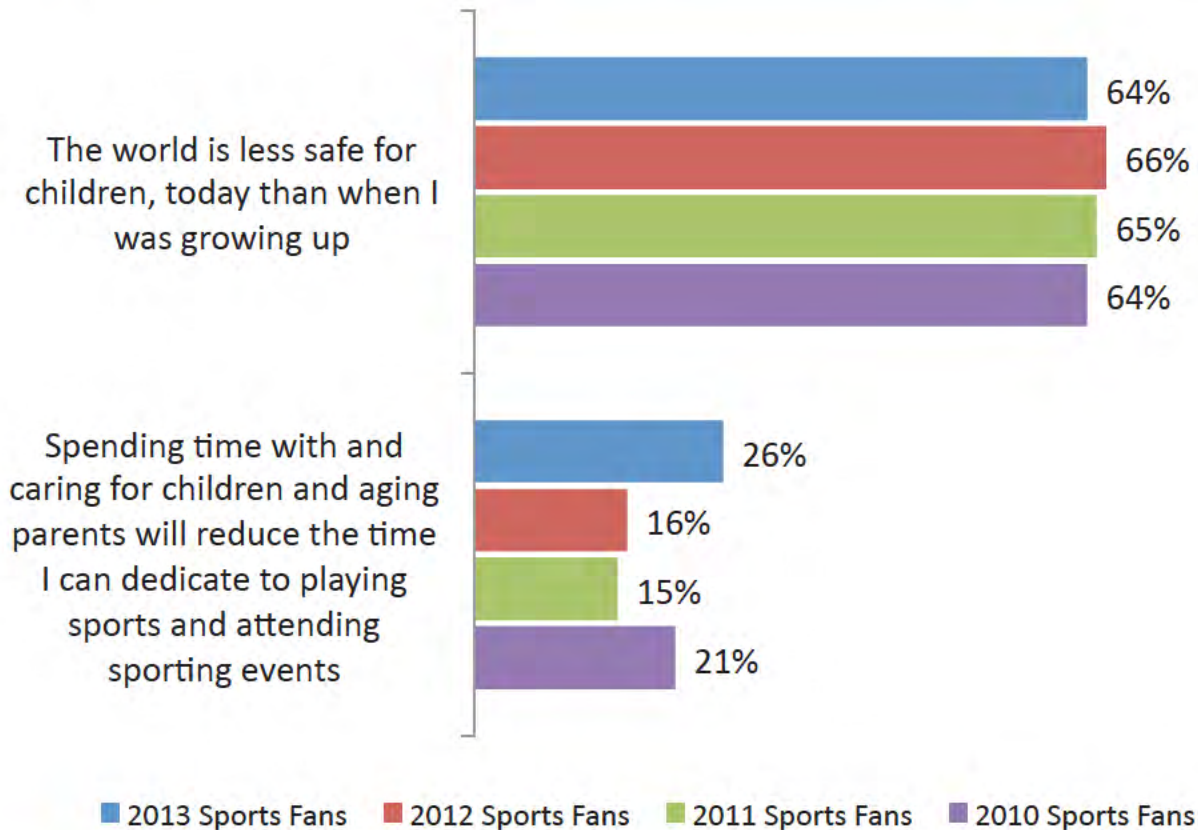


Top 3 Box Summary



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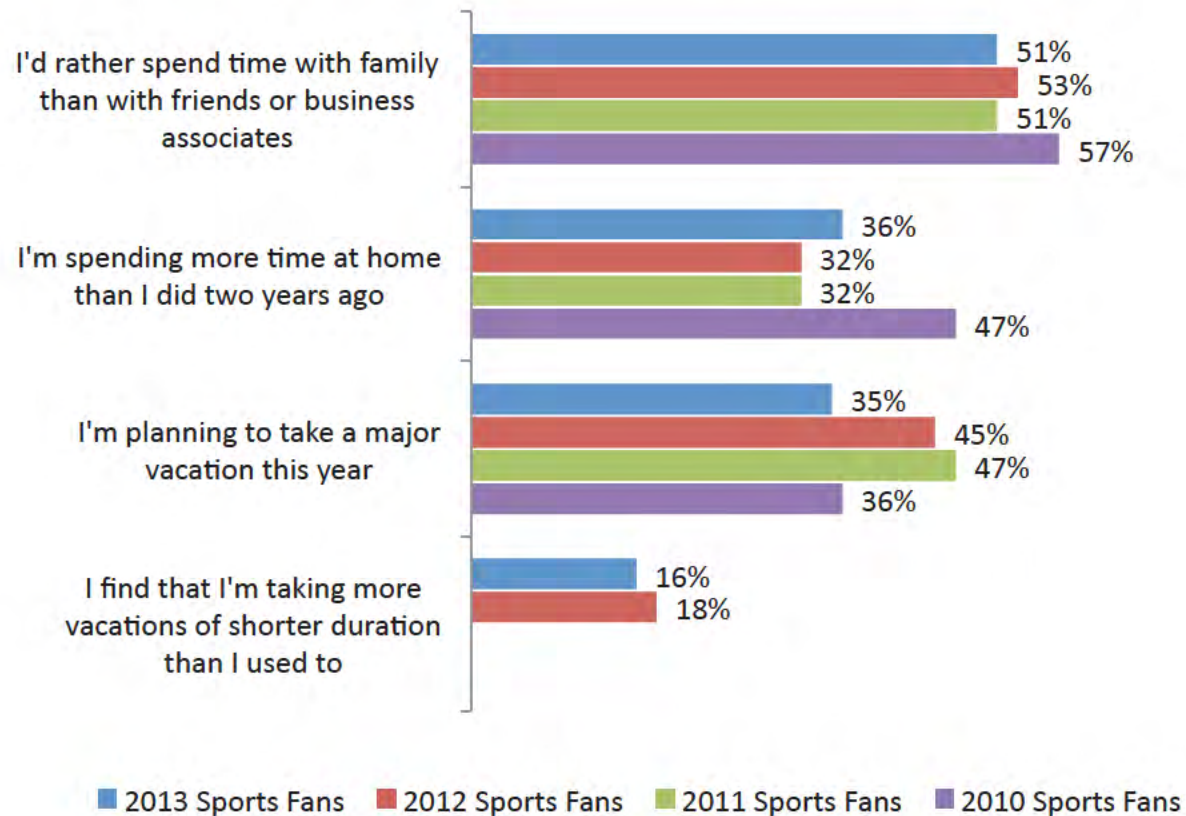
## Sports Fan Attitudes: Focus on Family Remains Ubiquitous



Top 3 Box Summary

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## Sports Fan Attitudes: Family Focus Remains Ubiquitous



Top 3 Box Summary