

THE SPORTS FAN MINDSET

2015

**SPORTS&
LEISURE**
RESEARCH GROUP



February 2015

Two Minute Take-Aways

- NFL, NCAA Football and MLB remain most popular, while the NHL and NBA are Neck and Neck.
- NCAA Football surges in popularity while MMA takes a hit. Boxing and horse racing continue to struggle
- Walking and fitness top recreational sports as cycling reaches parity with running/jogging. Basketball continues to decline.
- Fan evaluations of commissioners show Silver posting a stellar rookie performance, while MLB's Selig goes out on a high note. Goodell's evaluation suffers after a season of scrutiny.
- Fan are not fully sold on the College Football Playoff's ability to crown a true champion; reject college athlete pay for play; bristle at conference musical chairs.
- MLB fans are bullish on instant replay and continue to lament player movement.

Two Minute Take-Aways (continued)

- NBA fans see slight improvement in competitive balance, while not supporting the notion of “one and done” college players
- NFL fans remain concerned with concussions but many are still willing to “take the risk.” They show strong aversion to a European based NFL team
- Fans show concern with off-field NFL player conduct and are more optimistic of Marcus Mariotta’s future success compared to Jameis Winston.
- Some signs of greater sports fan consumer confidence and greater faith in the labor market, but caution persists.
- Information overload remains a reality as fans gravitate more to the live game experience and quality time with the family.

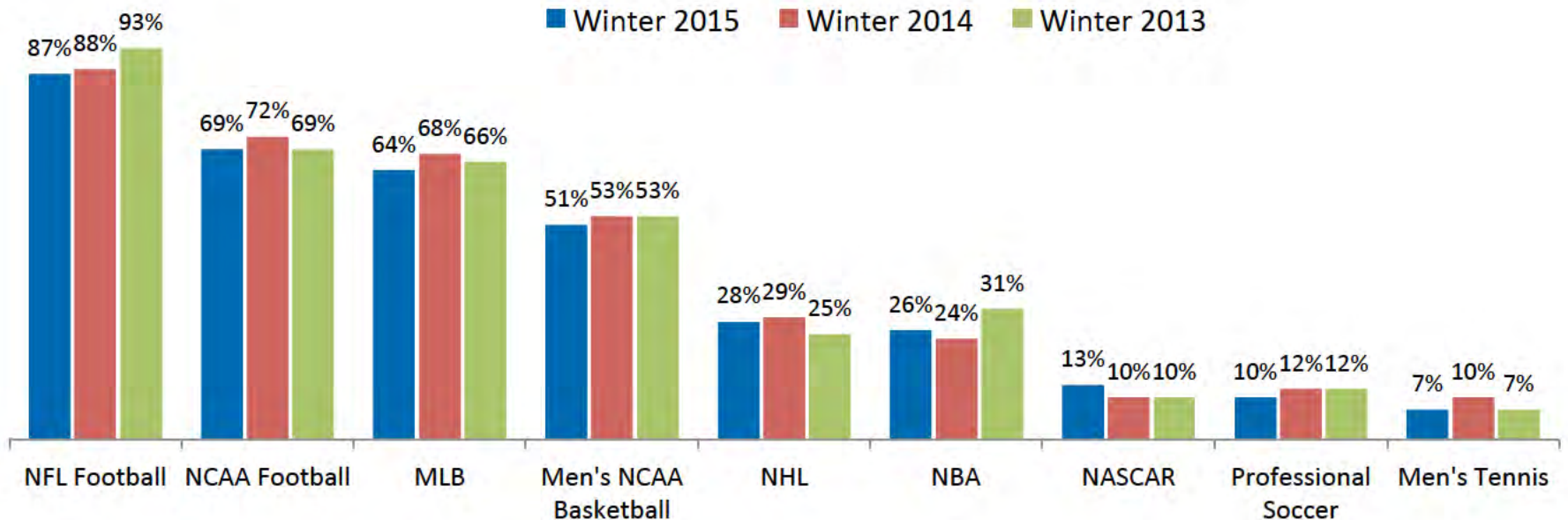
Background, Objectives and Methodology

- Winter 2015 SLRG Sports Omnibus
 - Assess the attitudes and perceptions of American sports fans
- Initiated by Sports and Leisure Research Group in 2009
- 2015 online survey of over 1,200 total respondents



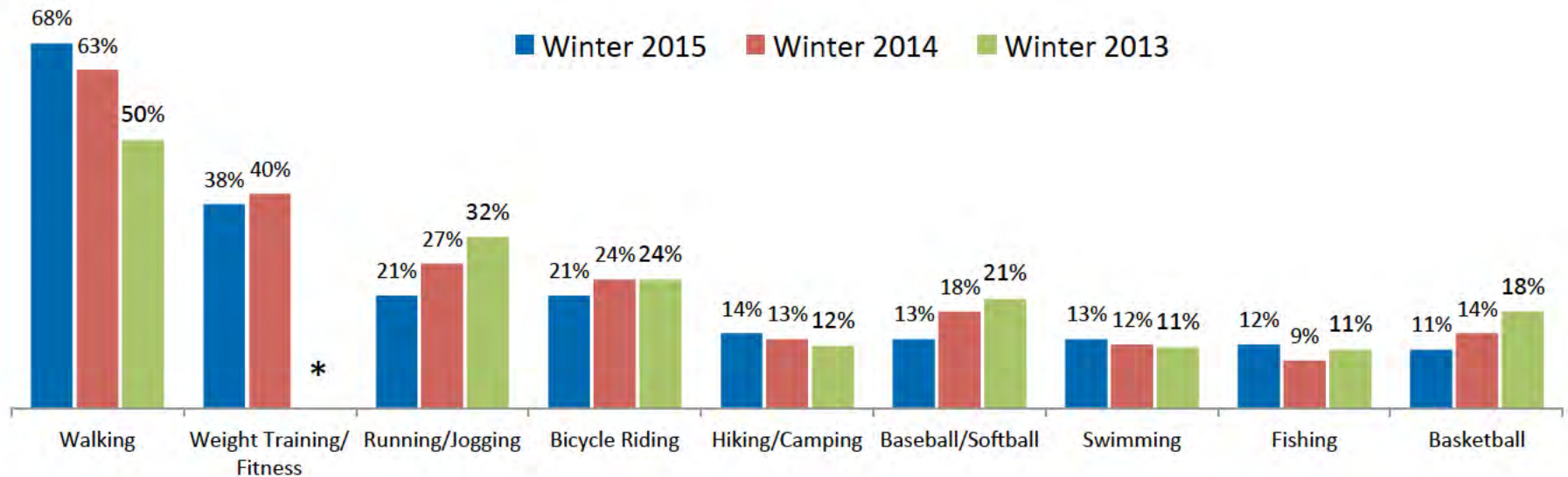
Top Four Most Popular Sports Remain Consistent; NHL and NBA are Neck and Neck

Q I watch and follow _____ closely



Recreational Sports Participation: Cycling Moves to Parity With Running/Jogging; Basketball Continues Decline

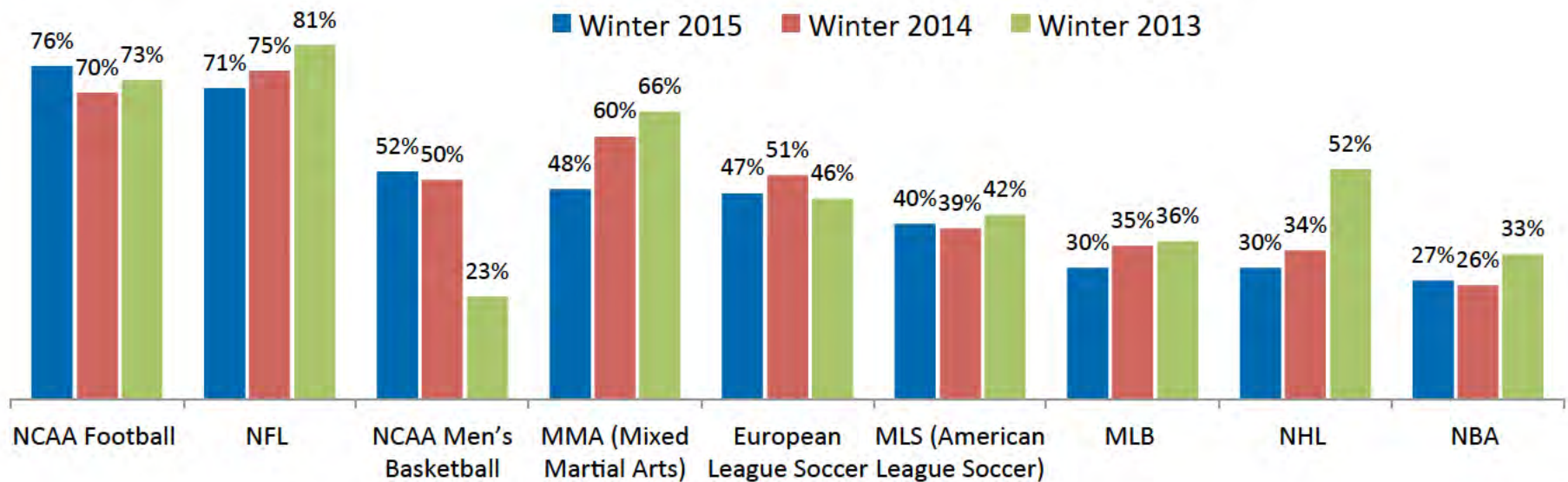
Q Which of the following sports do you participate in regularly, that is at least twice per month during season?



*Note: Fitness is new for 2014

Perceived Popularity of Spectator Sports: NCAA Football Surges, While MMA and European Soccer Slip

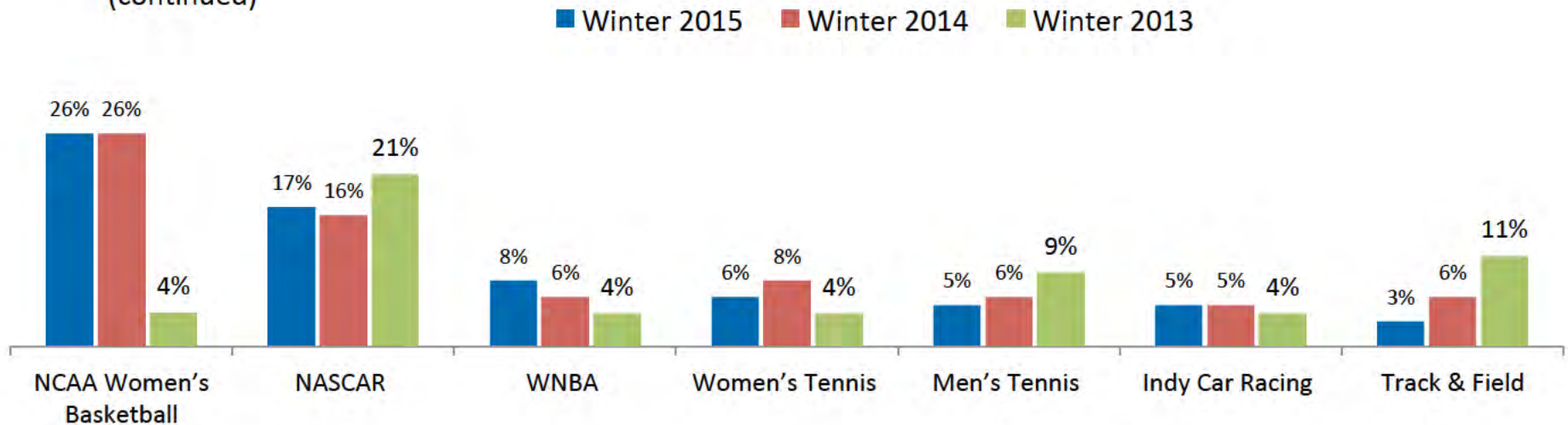
Q Please indicate whether you think this sport has become **MORE** popular



Perceived Popularity of Spectator Sports: NCAA Football Surges, While MMA and European Soccer Slip

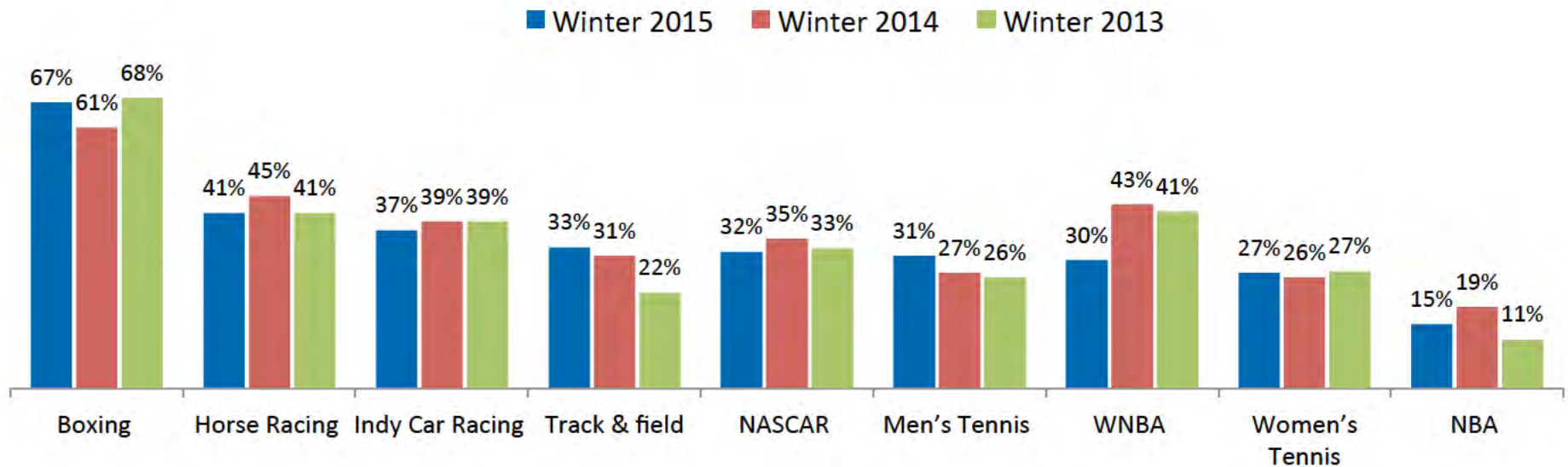
Q Please indicate whether you think this sport has become **MORE** popular

(continued)



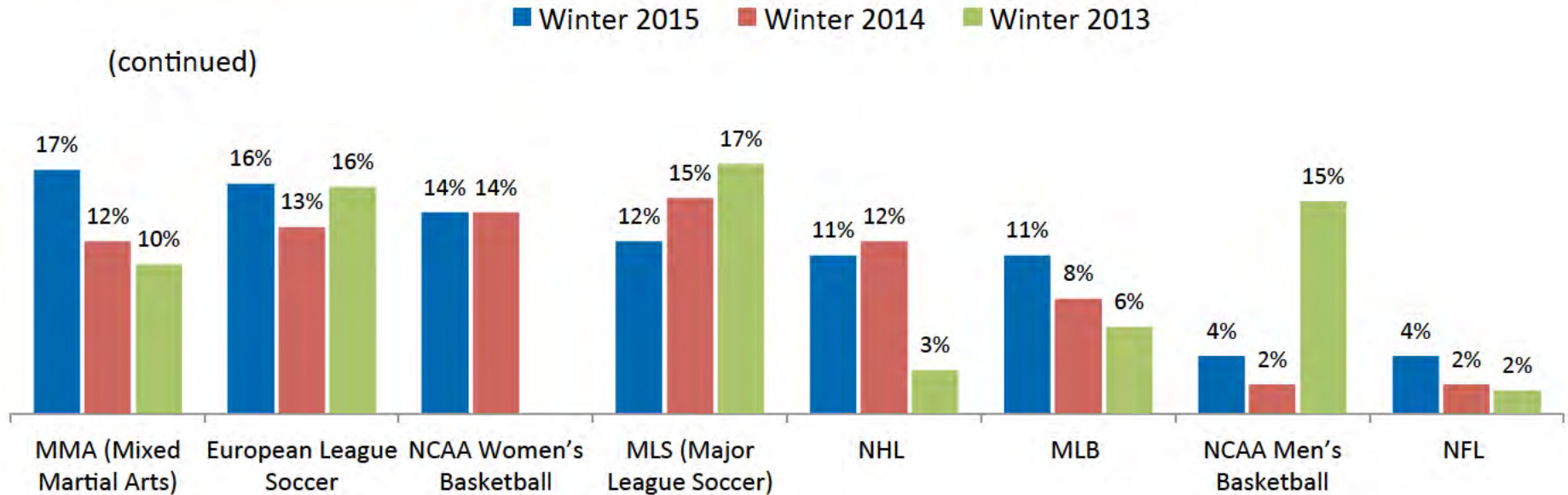
WNBA, NASCAR Stem the Negative Tide, while Boxing, Horse Racing Continue to Struggle

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

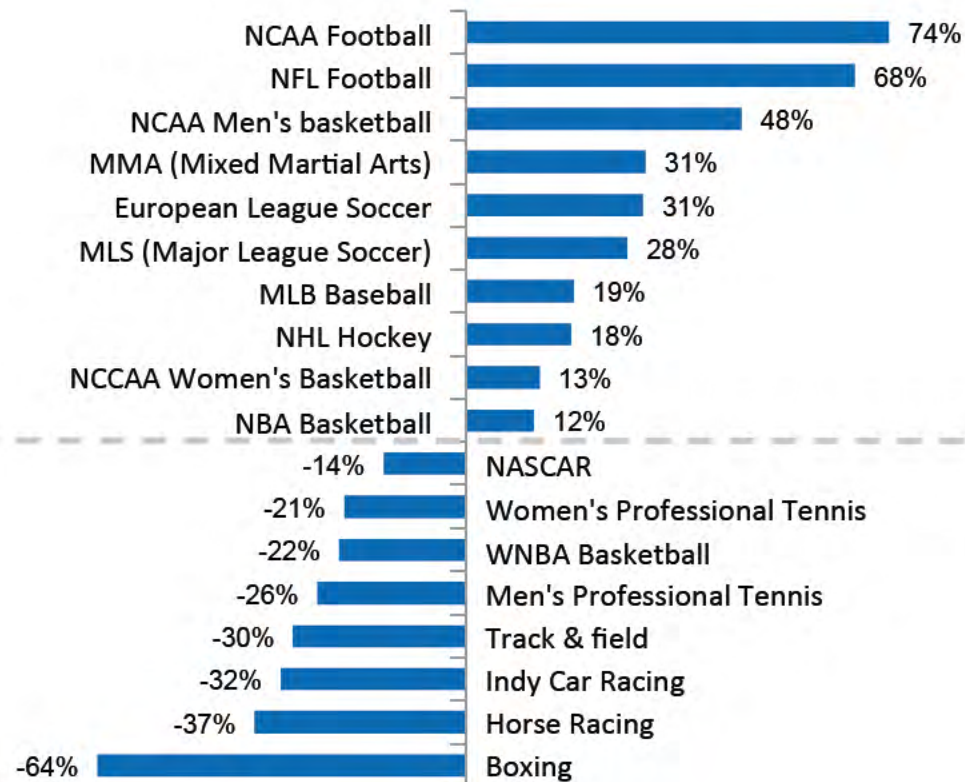


WNBA, NASCAR Stem the Negative Tide, while Boxing, Horse Racing Continue to Struggle

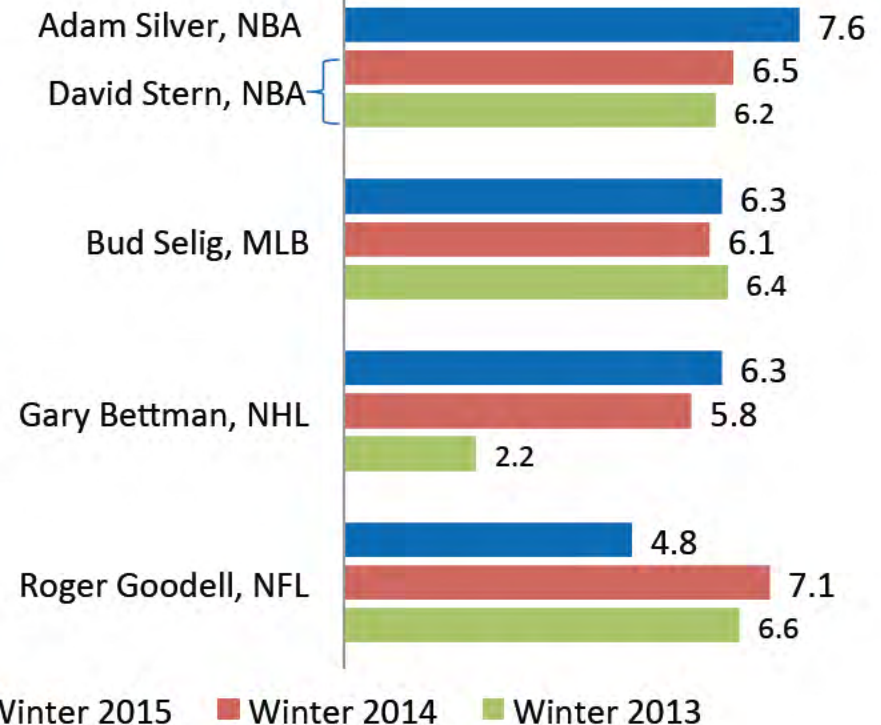
Q Please indicate whether you think this sport has become **LESS** popular



Difference Between Those Who Say A Sport is Gaining vs. Losing Popularity: Bring on More Football



Approval Ratings on Commissioners: Silver Sprints Out of the Gate, Selig Exits on a High and Goodell feels the heat



Topical Issues: NCAA Fans Do Not Support Athlete Compensation



TOP 3 BOX SUMMARY	2015 Sports Fans	2014 Sports Fans	2013 Sports Fans
There are too many college bowl games	59%	57%	69%
In general, college coaches are overpaid	54%		
The Four team College Football Playoff has done a great job in identifying the best team in NCAA College Football	49%		
College athletes should receive cash compensation for their participation in Division I sports	35%	27%	
Major college conference realignment has been a positive for me, as a fan	20%	14%	

Topical Issues: MLB Fans Bullish on Instant Replay; Pace of Play

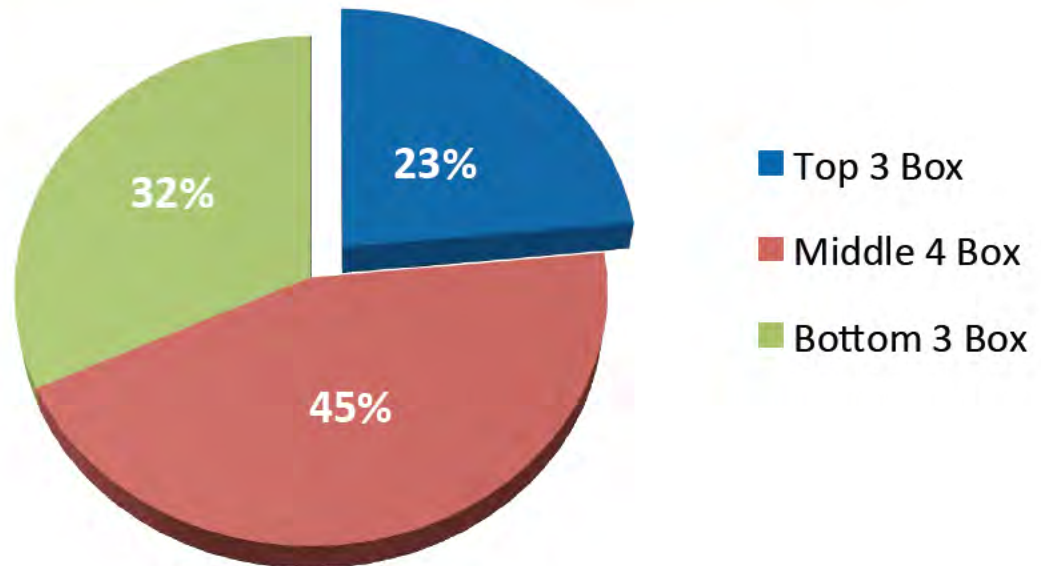


TOP 3 BOX SUMMARY	2015 Sports Fans	2014 Sports Fans	2013 Sports Fans
I wish that MLB could find a way to keep star players on their original teams for more of their careers	60%	57%	50%
Instant replay has worked well for Major League Baseball	57%		
Major League Baseball games take too long	48%	63%	
The Los Angeles Dodgers will win the 2015 World Series	5%		

Topical Issues: Less Than 25% of NHL Fans Feel that the Season Is Too Long!



Level of Agreement: "The NHL regular season is too long"



Topical Issues: NBA fans See Greater Parity; Reject “One and Done”



TOP 3 BOX SUMMARY	2015 Sports Fans	2014 Sports Fans	2013 Sports Fans
I'd like to see eligibility rules modified to require prospective NBA players to stay in school for at least two years	67%		
There aren't enough teams capable of winning a Championship in the NBA	32%	48%	37%
The Cleveland Cavaliers will play in the NBA finals this season	6%	38%	

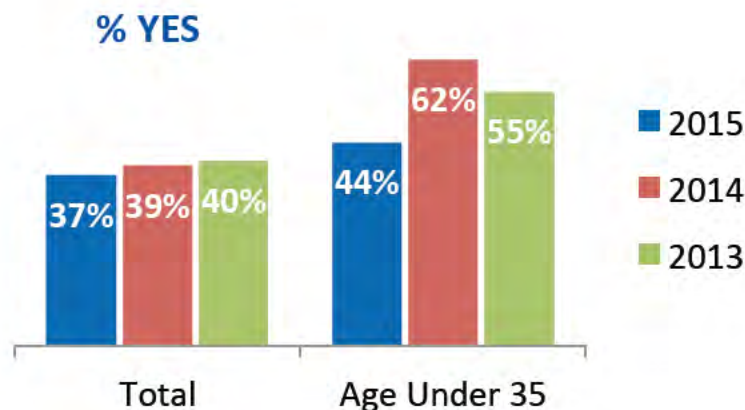
Topical Issues: Fans Concerned With Player Conduct; Shun Europe



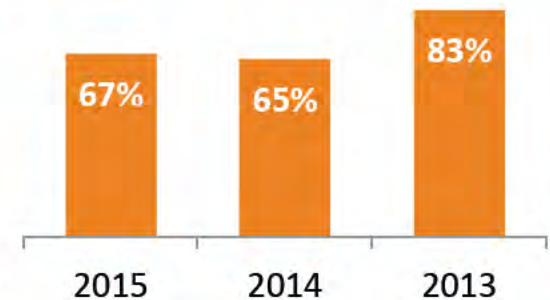
TOP 3 BOX SUMMARY	2015 Sports Fans
Off-field player conduct is a particularly rampant issue in the NFL, relative to other sports	45%
The new NFL player conduct policy will be a strong positive for the league	40%
I'd be excited to see an NFL team based in Europe	5%

The Concussions Contradiction: Younger NFL Fans Fall in Line, But More than A Third Would Still Risk the Threat for an NFL Career

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?**

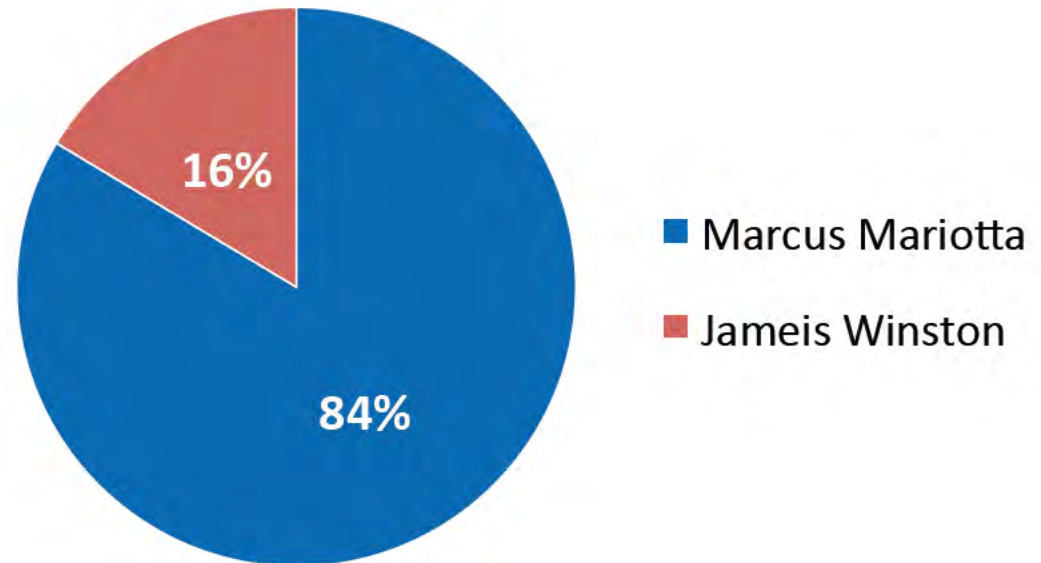


"The issue of concussions in football is among the most serious problems that must be dealt with"



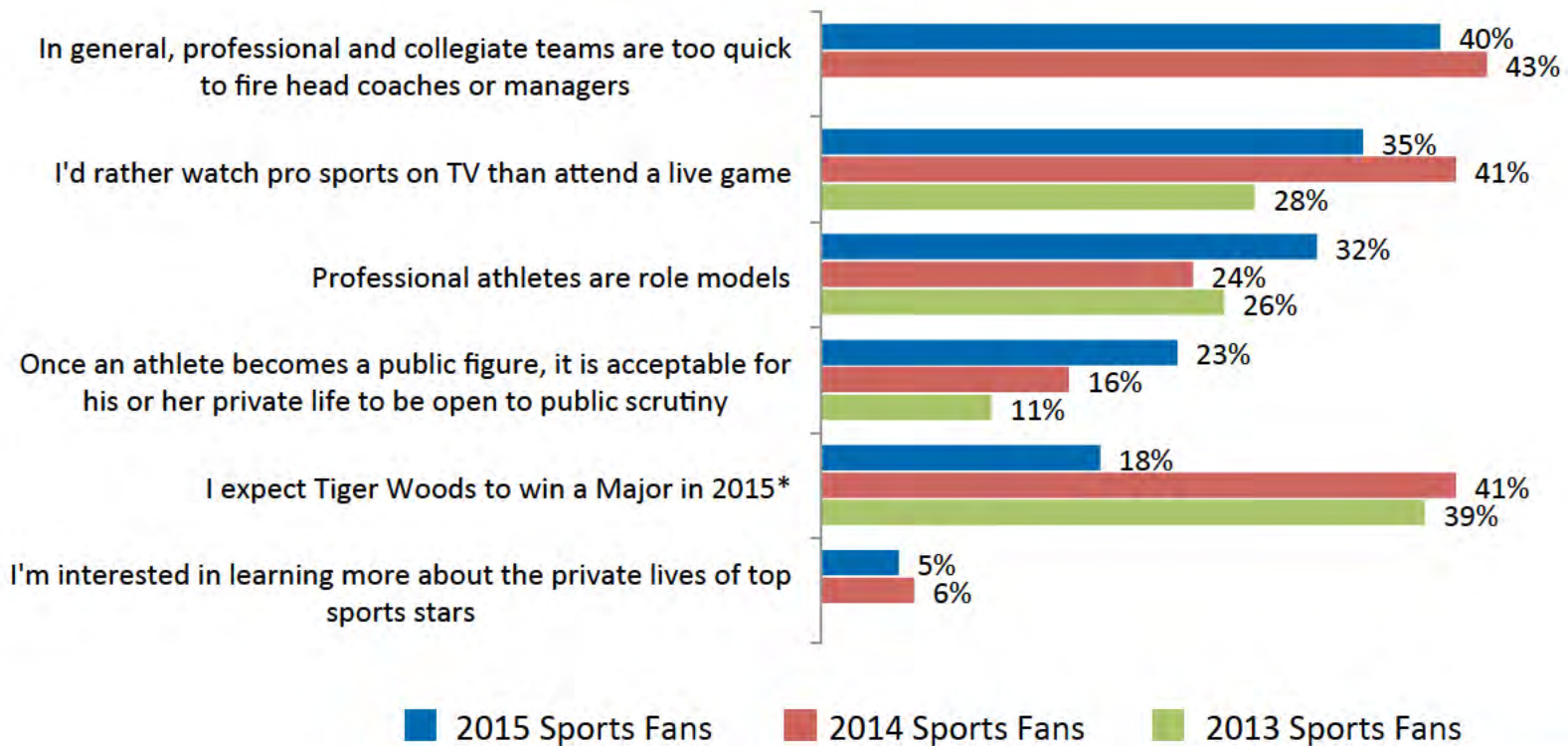
Quarterback of the Future? NFL Fans Favor Mariotta

Q Who will ultimately have the better NFL career?

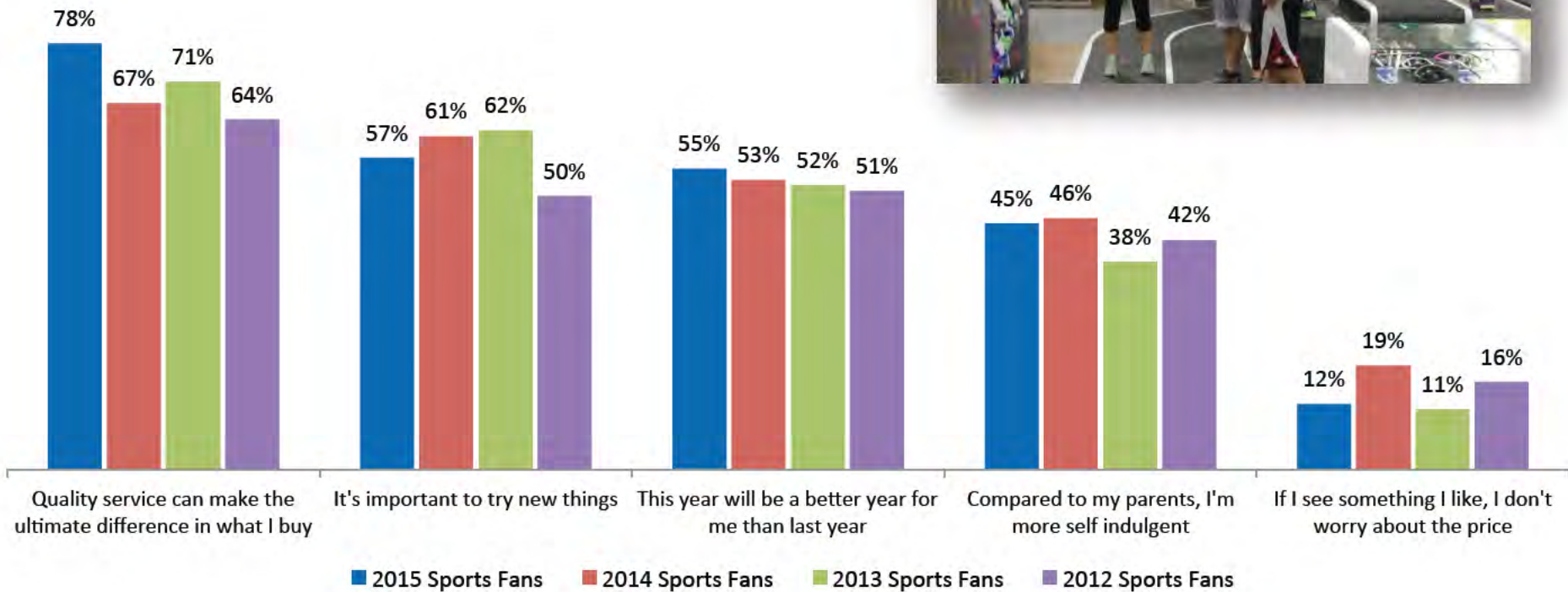


Other Fan Attitudes: Less Patience with Coaches; More Scrutiny of Athlete Behavior; Greater Reverence for the In Venue Experience

Top 3 Box Summary

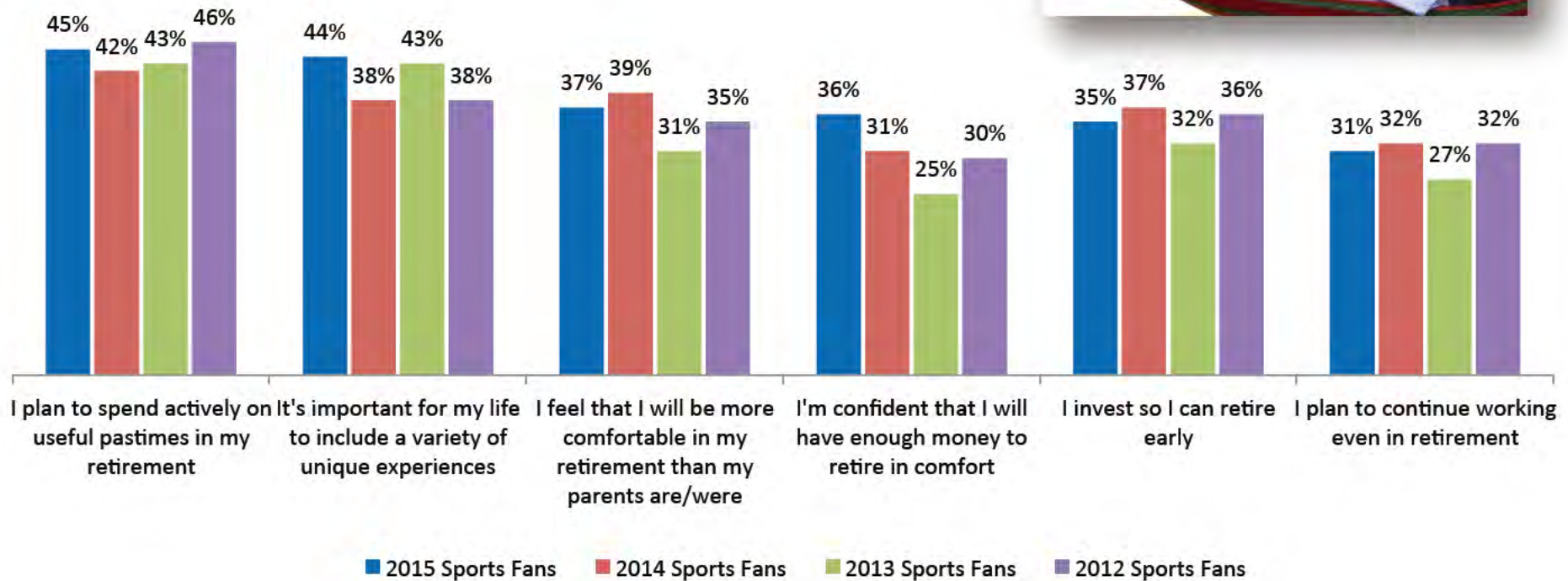


Sports Fan Attitudes: Service is King



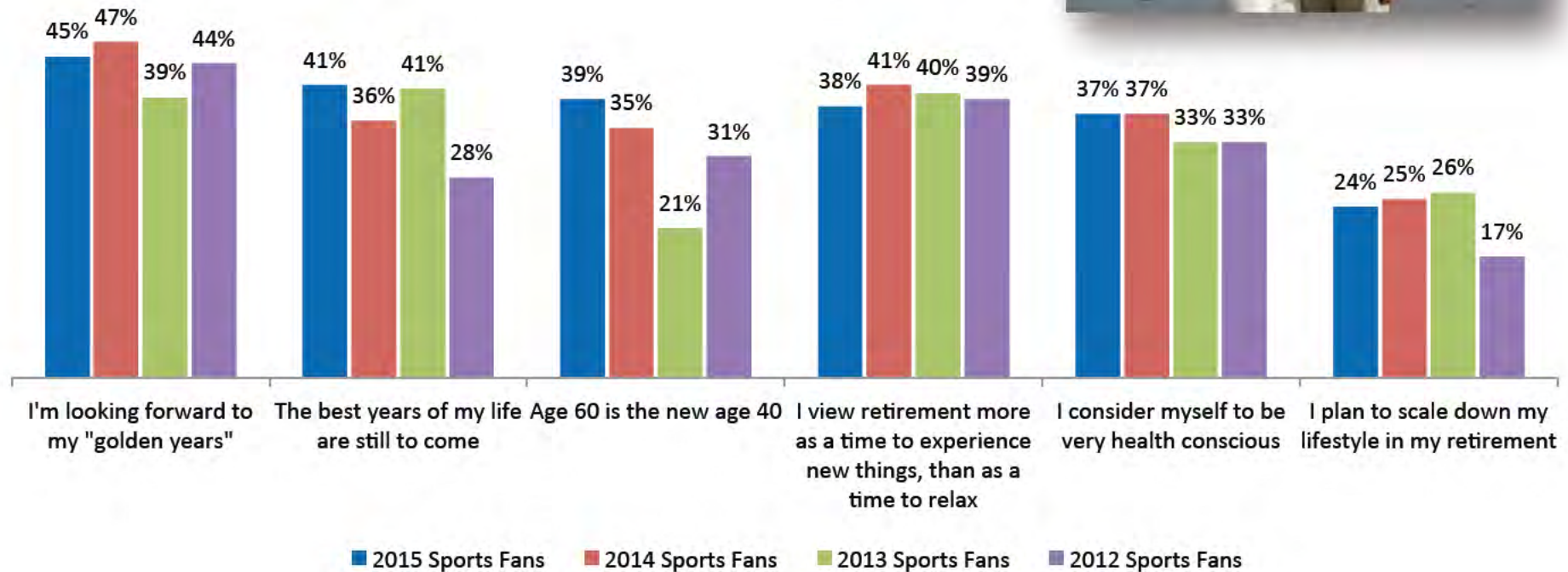
Top 3 Box Summary

Sports Fan Attitudes: More Confidence



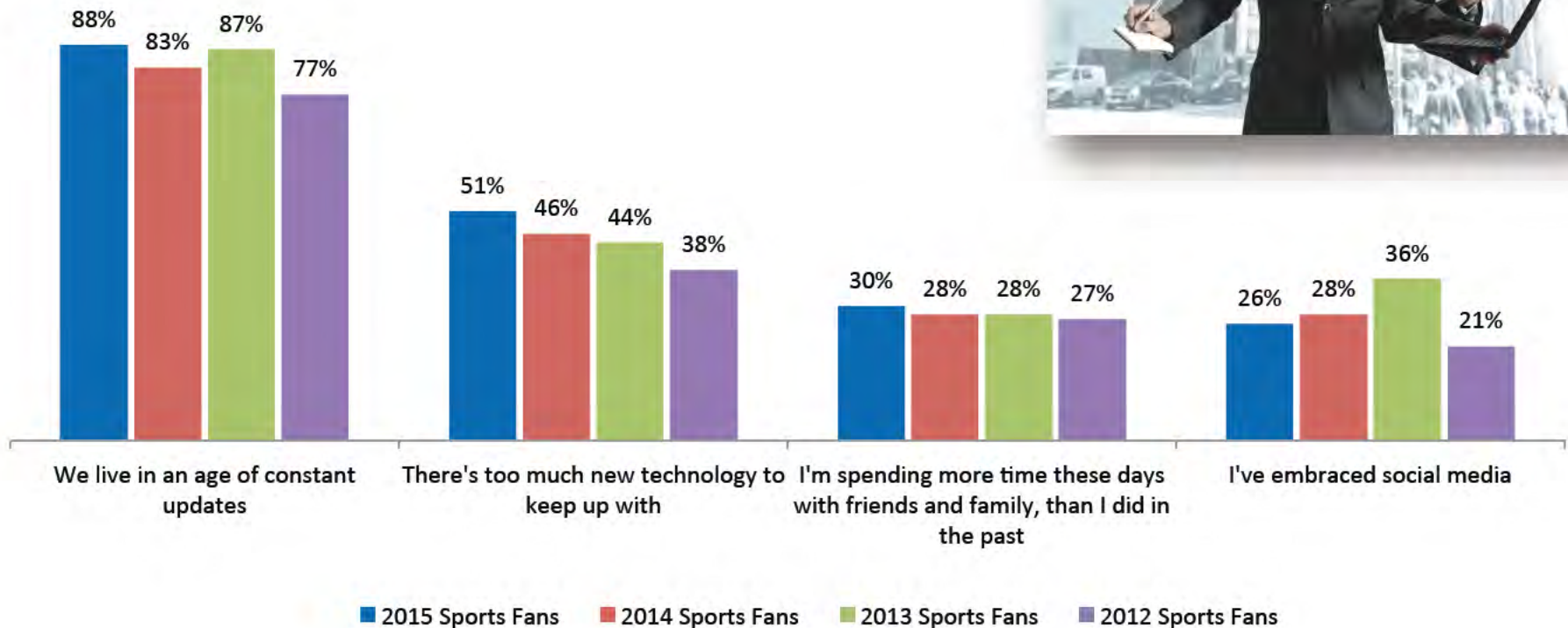
Top 3 Box Summary

Sports Fan Attitudes: On to the Future



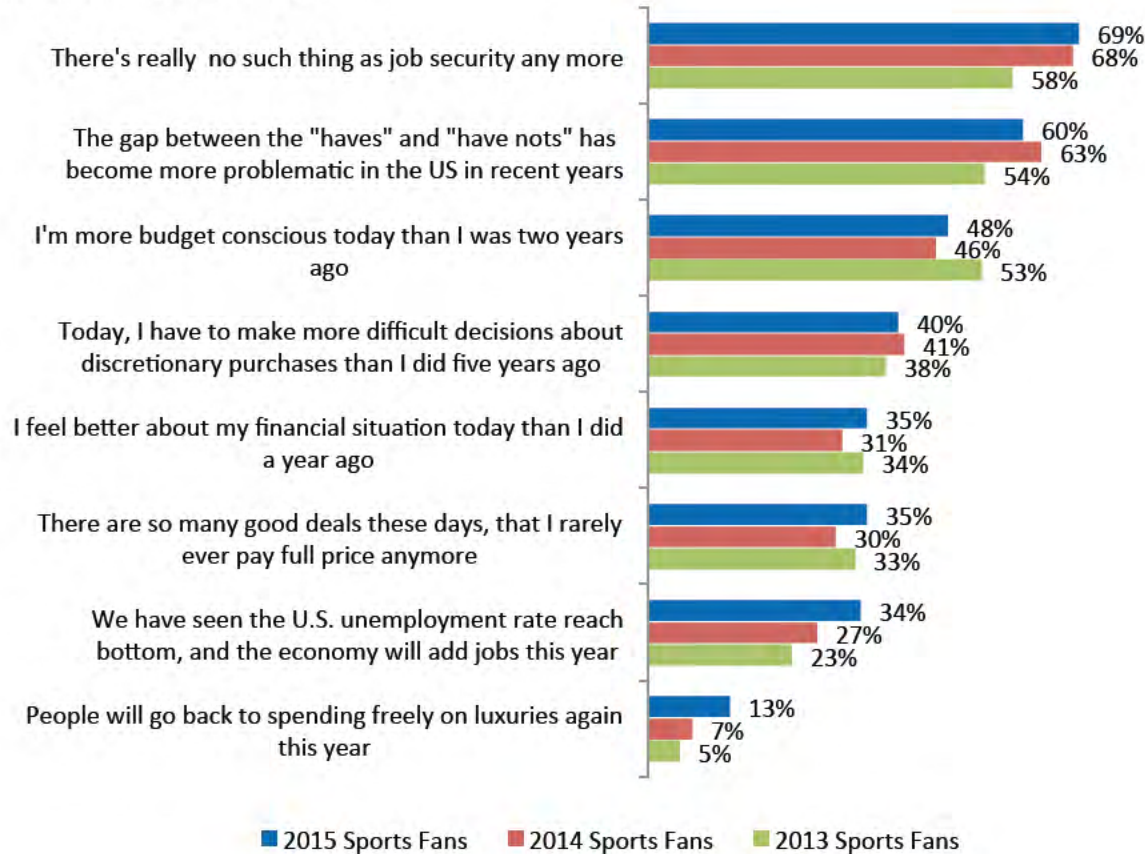
Top 3 Box Summary

Sports Fan Attitudes: Info Overload Endures



Top 3 Box Summary

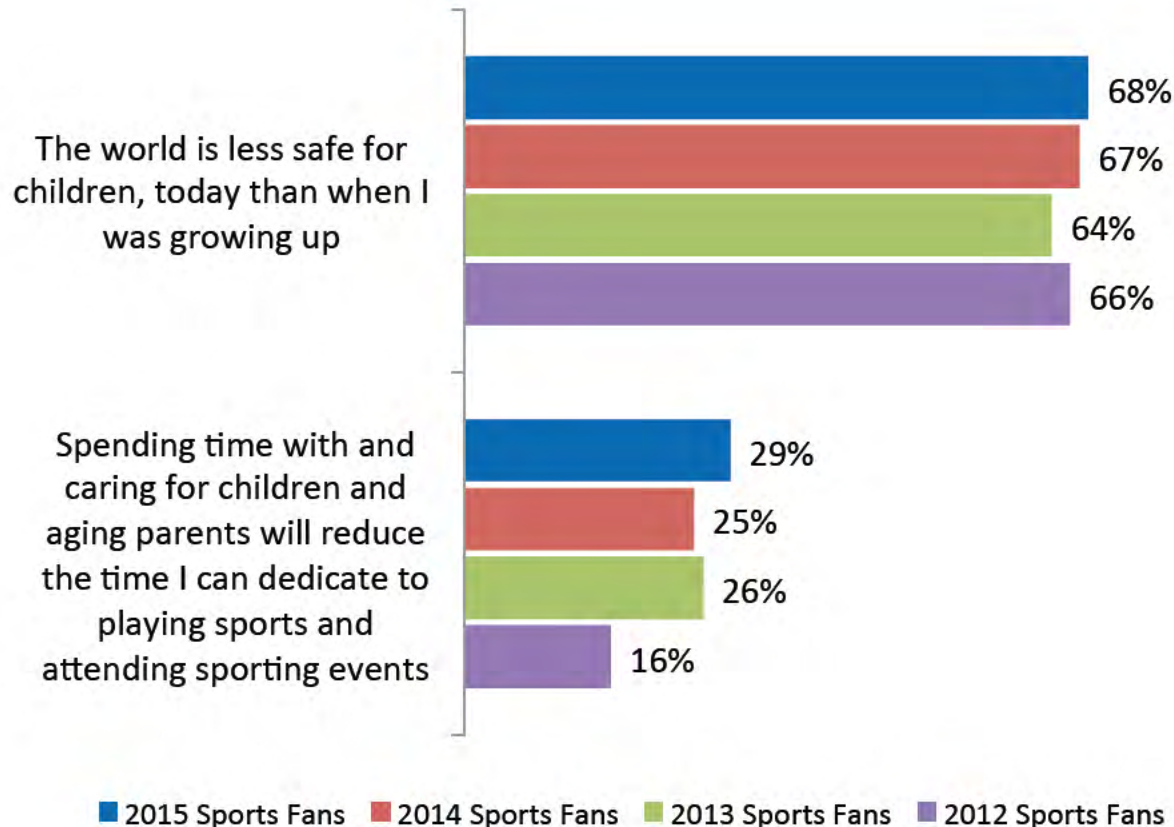
Sports Fan Attitudes: Caution Persists, Amidst Greater Faith in The Labor Market



Top 3 Box Summary



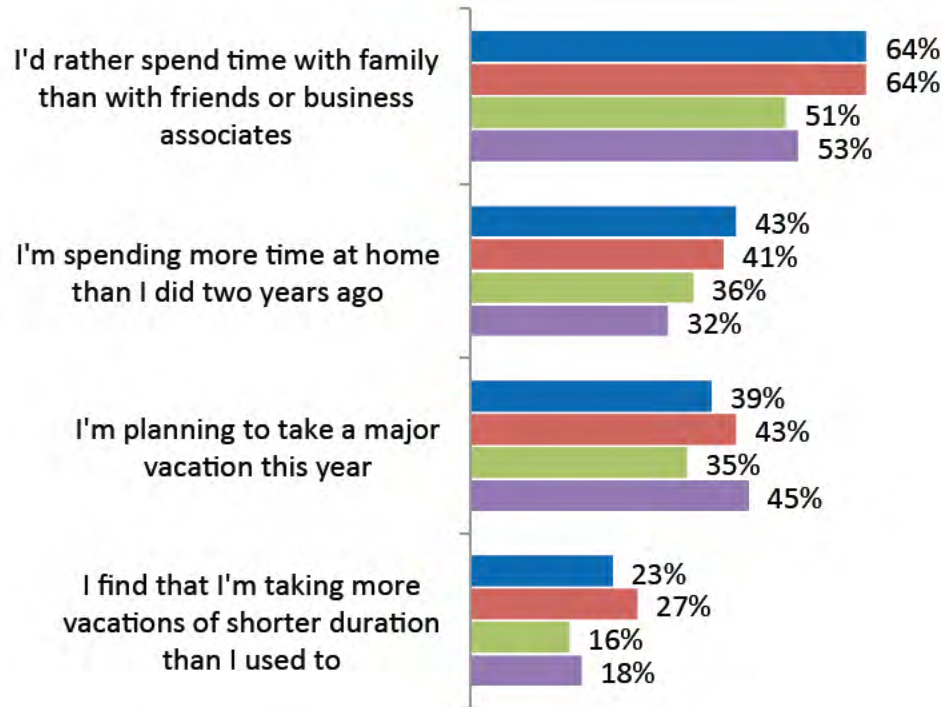
Sports Fan Attitudes: A Growing Focus on the Family



Top 3 Box Summary



Sports Fan Attitudes: Family Focus Continues to Fuel Leisure Priorities



■ 2015 Sports Fans ■ 2014 Sports Fans ■ 2013 Sports Fans ■ 2012 Sports Fans



Top 3 Box Summary