The Sports Fan Mindset 2012

February 2012
Two Minute Take-Aways

• NFL, NCAA Football and MLB, once again cited as most popular sports. NHL and Soccer trend positively and both show strong growth in perceptions of increased popularity

• Trending up in net popularity (perceived popularity growth minus perceived popularity declines):
  – NFL Football
  – NCAA Football
  – NHL
  – MLB
  – Soccer
  – NCAA Men’s Basketball

• Greatest declines in net popularity seen for:
  – Boxing
  – WNBA
  – Horse Racing

• Fans perceive Bowl game overload, and question whether the BCS ratings properly identified the two best NCAA football teams in 2011
Two Minute Take-Aways

• Sports fan attitudes about the economy and their short term future remains guarded in 2012, but nearly half still strongly agree that they will spend actively on favorite activities and pursue more family and vacation time.

• Amidst a greater family focus and increased time pressures, fans still find a way to make their sports a priority.

• Nearly a third of NBA fans predict that the Heat will capture the NBA title...up significantly from a year ago. However concerns linger about competitive balance in the league.

• Concussions are still perceived to be a major issue in the NFL and fans believe that the league’s efforts to curtail them have been more effective year over year.

• Baseball fans express mixed opinions about the coming divisional realignment and expanded wild card playoffs, yearn for less player movement.

• Sports fans continue to be less likely to see professional athletes as role models and express limited interest in their private lives.
Background, Objectives and Methodology

• Winter 2012 SLRG Sports Omnibus
  – Assess the attitudes and perceptions of golfers
• Initiated by Sports and Leisure Research Group in 2009
• 2012 online survey of nearly 1,200 total respondents
NFL, NCAA Football, and MLB maintain their Top 3 Positions; NHL and Soccer Trend Upward

Question: I watch and follow _______ closely

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<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>NFL Football</td>
<td>88%</td>
<td>85%</td>
<td>8%</td>
</tr>
<tr>
<td>NCAA Football</td>
<td>73%</td>
<td>67%</td>
<td>6%</td>
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<tr>
<td>MLB</td>
<td>64%</td>
<td>55%</td>
<td>7%</td>
</tr>
<tr>
<td>Men's NCAA Basketball</td>
<td>57%</td>
<td>49%</td>
<td>6%</td>
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<tr>
<td>NHL</td>
<td>18%</td>
<td>22%</td>
<td>17%</td>
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<tr>
<td>NBA</td>
<td>25%</td>
<td>26%</td>
<td>24%</td>
</tr>
<tr>
<td>NASCAR</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Soccer</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Men's Tennis</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Indy Car Racing</td>
<td>8%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Women's Tennis</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Mixed Martial Arts</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Boxing</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Horse Racing</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>WNBA</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
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</table>
Walking continues to be the dominant recreational sport.
Perceived NHL, Soccer Popularity growth is significant!

Question: Please indicate whether you think this sport has become more popular.
# Professional Sports Losing Popularity

Boxing, WNBA, and NCAA Women’s Basketball not faring as well

**Question:** Please indicate whether you think this sport has become less popular.

<table>
<thead>
<tr>
<th>Sport</th>
<th>Winter 2010</th>
<th>Winter 2011</th>
<th>Winter 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boxing</td>
<td>71%</td>
<td>70%</td>
<td>57%</td>
</tr>
<tr>
<td>WNBA</td>
<td>46%</td>
<td>44%</td>
<td>54%</td>
</tr>
<tr>
<td>NCAA Women’s Basketball</td>
<td>15%</td>
<td>15%</td>
<td>46%</td>
</tr>
<tr>
<td>Horse Racing</td>
<td>41%</td>
<td>36%</td>
<td>40%</td>
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<tr>
<td>NBA</td>
<td>39%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Indy Car Racing</td>
<td>35%</td>
<td>41%</td>
<td>29%</td>
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<tr>
<td>Women’s Tennis</td>
<td>34%</td>
<td>39%</td>
<td>30%</td>
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<tr>
<td>NASCAR</td>
<td>33%</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Men’s Tennis</td>
<td>33%</td>
<td>39%</td>
<td>31%</td>
</tr>
<tr>
<td>NCAA Men’s Basketball</td>
<td>15%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Soccer</td>
<td>12%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>MLB</td>
<td>10%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>NHL</td>
<td>3%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>NFL</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>NCAA Football</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
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</tbody>
</table>
NFL, NCAA Football, and NHL are seeing the greatest gains in popularity
NFL, NCAA Football, and NHL are seeing the greatest gains in popularity
Attitudes on the Administration of Our Most Popular Sports

Approval Rating for Commissioners

- Roger Goodell, NFL: 7.5 in Winter 2012, 7.7 in Winter 2011, 7.7 in Winter 2010
- Gary Bettman, NHL: 6.1 in Winter 2012, 5.9 in Winter 2011, 5.7 in Winter 2010
- Bud Selig, MLB: 6.0 in Winter 2012, 5.7 in Winter 2011, 5.7 in Winter 2010
- David Stern, NBA: 4.9 in Winter 2012, 6.4 in Winter 2011, 6.4 in Winter 2010

NCAA Attitudes

- Despite all of the grumblings about the BCS, the two best teams in the nation are playing in this year's national championship game: 41%
- There are too many college bowl games: 76% (Winter 2012), 74% (Winter 2011), 56% (Winter 2010)
- College coaches who violate NCAA recruiting regulations should be banned from coaching: 47% (Winter 2012), 42% (Winter 2011), 52% (Winter 2010)

Top 3 Box

David Stern, NBA
Bud Selig, MLB
Gary Bettman, NHL
Roger Goodell, NFL

SPORTS & LEISURE RESEARCH GROUP
Sports Fans Look for Service as Differentiator; Economic Outlook is More Muted

Quality service can make the ultimate difference in what I buy
Compared to my parents, I'm more self indulgent
If I see something I like, I don’t worry about the price
It's important to try new things
This year will be a better year for me than last year was

- Quality service can make the ultimate difference in what I buy: 62% (2009), 63% (2010), 64% (2011), 63% (2012)
- Compared to my parents, I'm more self indulgent: 41% (2009), 44% (2010), 42% (2011), 41% (2012)
- If I see something I like, I don’t worry about the price: 10% (2009), 18% (2010), 20% (2011), 16% (2012)
- It's important to try new things: 49% (2009), 54% (2010), 52% (2011), 50% (2012)
- This year will be a better year for me than last year was: 29% (2009), 47% (2010), 51% (2011), 51% (2012)
...Despite Tempered Confidence, Nearly Half of All Sports Fans Still Look to Spend on Favorite Activities!
The Future Remains a Mixed Bag, But Sports Fans are not looking to “Scale Down”

I view retirement more as a time to experience new things, than as a time to relax

I plan to scale down my lifestyle in my retirement

I’m looking forward to my "golden years"

I consider myself to be health conscious

The best years of my life are still to come

Age 60 is the new 40


Top 3 Box
We live in an age of constant updates. I'm spending more time these days with friends and family, than I did in the past. There's too much new technology to keep up with. I've embraced social media.

...And Sports Fan are Still Stressed and Trying to Balance Their Lives!

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>We live in an age of constant updates</td>
<td>70%</td>
<td>71%</td>
<td>73%</td>
<td>77%</td>
</tr>
<tr>
<td>I'm spending more time these days with friends and family, than I did</td>
<td>35%</td>
<td>32%</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>in the past</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There's too much new technology to keep up with</td>
<td>24%</td>
<td>32%</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>I've embraced social media</td>
<td>21%</td>
<td></td>
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</table>
Economic Concerns Linger...So a “Value” Message Can Still Resonate with Sports Fans

There are so many good deals these days, that I rarely ever pay full price anymore

The gap between "haves" and "have nots" has become more problematic in the US in recent years

There's really no such thing as job security anymore

We have seen the U.S. unemployment rate reach bottom, and it will add jobs in 2010

I'm more budget conscious today than I was two years ago

Today, I have to make more difficult decisions about discretionary purchases than I did five years ago

I feel better about my financial situation today than I did a year ago

People will go back to spending freely on luxuries again in 2011
Amidst Family Focus, Fans are Still Making Time For Sports

The world is less safe for children today than when I was a growing up:
- 2012 Sports Fans: 66%
- 2011 Sports Fans: 65%
- 2010 Sports Fans: 64%

Spending time with and caring for children and aging parents will reduce the time I can dedicate to playing sports and attending sporting events:
- 2012 Sports Fans: 16%
- 2011 Sports Fans: 15%
- 2010 Sports Fans: 21%

Top 3 Box
I'd rather spend time with family than friends or business associates.

I'm planning to take a major vacation this year.

I'm spending more time at home than I did two years ago.

I find that I'm taking more vacations of shorter duration than I used to.

Vacations and “Quality” Time With Friends and Family are Still Priorities

Top 3 Box
I wish that MLB could find a way to keep star players on their original teams for more of their careers.

The expansion of playoffs and realignment of divisions in 2013 will be good for MLB.

There are too many teams in the NHL.

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

There aren’t enough teams capable of winning a Championship in the NBA.

The Miami Heat will win the 2010-11 NBA Championship.

The Clippers, not the Lakers, are the better NBA team in Los Angeles.

I’m a fan of Lebron James.
Sports Fan believe that Resolution of the NFL labor agreement was more balanced than the NBA’s

Question: Which of the following best represents your opinion in assessing the recent labor issues in professional sports?
The NFL has been appropriate in disciplinary policies with players regarding unnecessary roughness during the 2010 season.

The issue of concussions in football is among the most serious problems that need to be dealt with.

Tim Tebow has been great for the NFL.
Perceptions: On Field Matters More than Off the Field; OnSite Fan Experience Bests TV; Tiger Comeback?

- Professional athletes are role models
  - 2012 Sports Fans: 32%
  - 2011 Sports Fans: 34%
  - 2010 Sports Fans: 29%

- Once an athlete becomes a public figure, it is acceptable for his or her private life to be open to public scrutiny
  - 2012 Sports Fans: 27%
  - 2011 Sports Fans: 20%
  - 2010 Sports Fans: 18%

- I’m interested in learning more about the private lives of top sports stars.
  - 2012 Sports Fans: 6%
  - 2011 Sports Fans: 7%
  - 2010 Sports Fans: 6%

- Professional sports leagues’ should limit and manage player usage of Twitter
  - 2012 Sports Fans: 30%
  - 2011 Sports Fans: 26%
  - 2010 Sports Fans: 29%

- I’d rather watch pro sports on TV than attend a live game
  - 2012 Sports Fans: 34%
  - 2011 Sports Fans: 34%
  - 2010 Sports Fans: 34%

- I’m excited by the influx of top foreign players on the PGA TOUR
  - 2012 Sports Fans: 24%
  - 2011 Sports Fans: 30%

- There’s a new breed of young players that will dominate professional golf this year
  - 2012 Sports Fans: 40%

- The golfing public is rooting for Tiger Woods to come back strong in 2011
  - 2012 Sports Fans: 35%
  - 2011 Sports Fans: 39%
  - 2010 Sports Fans: 42%