



SPORTS OMNIBUS SURVEY

PRESENTED, Summer 2009



Background, Objectives & Methodology

- The summer 2009 Sports omnibus was fielded to assess the attitudes and perceptions of sports fans on significant issues impacting the sports industry, with particular emphasis on golf and baseball. A control sample of non-sports fans were also surveyed to provide context and comparison.
- Sports and Leisure Research Group fielded the survey in early to mid July, in partnership with ISA and SSI.
- The online survey of 1,515 respondents included 1,113 sports fans and 402 non-sports fans. Sub quotas of 523 baseball fans and 312 golfers were recruited and served custom modules of topic specific questions.

Respondent Profile

- Age: 45-64 56%
- Watches Professional Sports 73%
- Hours Watching Sports per Week (mean) 7.95

Key Take-Aways

- The National Football League has the highest fan base, and has become significantly more popular over the past 2-3 years.
- Fans would like to see players eligible for the draft before graduating high school
- Tim Finchem and Roger Goodell, have highest approval ratings of all commissioners, with MLB's Bud Selig low in comparison.
- Athletes on the PGA TOUR are most admired, followed by those in the NFL, MLB and NASCAR.
- 20% of baseball fans feel that they are “less of a fan” due to the use of performance enhancing drugs in baseball, while a similar 19% feel the issue has been overblown. 61% would like to see the full list of players who tested positive in 2003.

Key Take-Aways

- 75% of NFL fans feel that there should be a rookie salary cap
- 84% of NCAA Football fans feel that a playoff system should be instituted. Of those who do, 47% would like to see a bracket system similar to that of the NCAA Basketball playoffs, and 47% would like to see a conference champions plus wildcard format, similar to that of the NFL.
- 59% of golfers intend to spend the same amount of money of golf equipment and apparel as in 2008, and 77% expect to play the same amount or more than they did last season.
- Sports fans seem to be more secure in their prospects for the future and retirement in comparison to non-sports fans

Key Take-Aways

- NFL Football shows the greatest positive difference in those who consider the sport to have grown in popularity versus decreased in popularity over the past two to three years, with an aggregate difference of +54%, highest of all sports. Other significant net positives were NCAA Football, NASCAR, PGA Tour Golf, NCAA Men's Basketball, MLB, Soccer, and the NBA.
- Those showing a net decrease in popularity included Boxing, the WNBA, and Horse Racing.

Key Take-Aways

- Fans have little tolerance for the use of performance enhancing drugs in sports and overwhelmingly disagree that they would use them, if they were athletes and knew that they wouldn't get caught doing so.
- 70% agree that corporate sponsorship has a place in professional sports. Nearly half strongly agree.
- Only one of five fans feel that college athletes should be paid to play.

Baseball Fan Attitudes

- While only 20% feel that disclosure of performance enhancing drug use has made them less of a baseball fan.. a similar % age feel that the issue has been overblown by the media and that players from the “steroid era” will be regarded just as highly as those from other eras.
- A majority of baseball fans strongly agree that
 - free agency has shifted the balance of power to wealthier teams (54%)
 - a salary cap should be enacted (61%)
 - Inter-League Play has been a positive for baseball (53%)
 - MLB should play a “day-game” during the World Series (51%)
 - MLB umpires do an excellent job (56%)
 - Instant Replay has been a positive (57%)

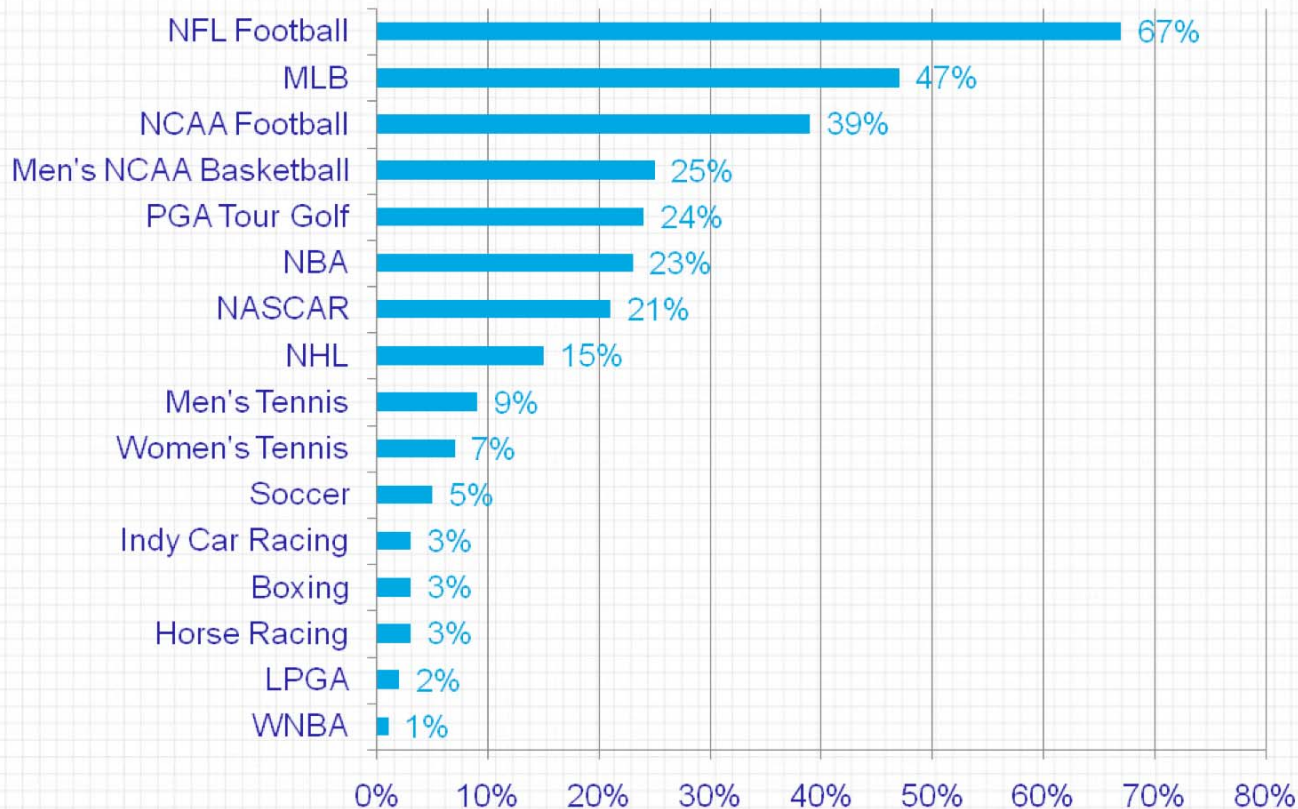
Baseball Fan Attitudes

- Only 34% feel that sports gambling has become a serious problem
- Fans also reject the notion of:
 - A more balanced MLB schedule (23%)
 - Awarding home field advantage to the All-Star game winner (44%)

Key Take-Aways: Pete Rose

- A significant amount of baseball fans feel that both Shoeless Joe Jackson and Pete Rose should be inducted into the hall of fame...more so than for a variety of contemporary players who have been implicated for use of performance enhancing drugs.
- 50% of baseball fans feel that Pete Rose's suspension should be lifted.
- Only 24% of baseball fans would hold Bud Selig in lesser regard, if he lifted Pete Rose's ban from Major League Baseball and allowed him to be eligible for the Hall of Fame.

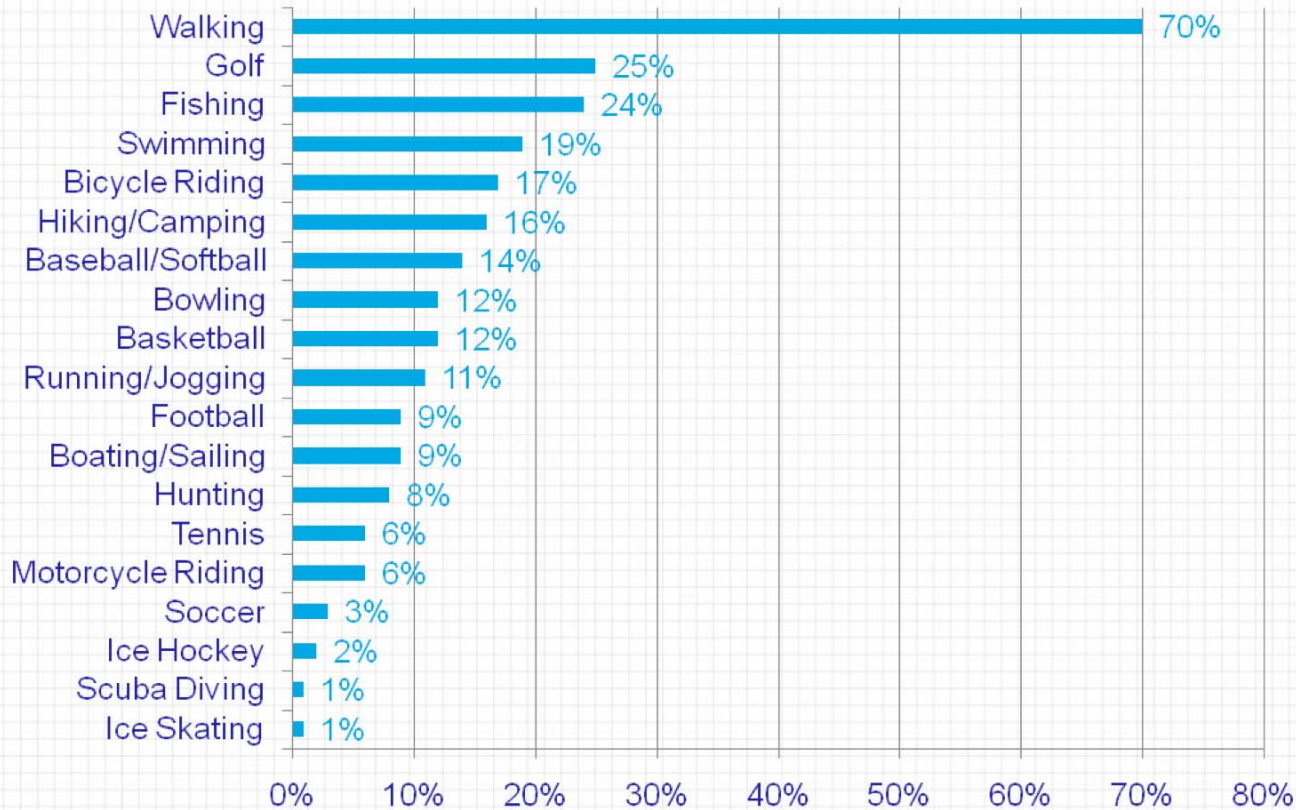
Watch and Follow Closely



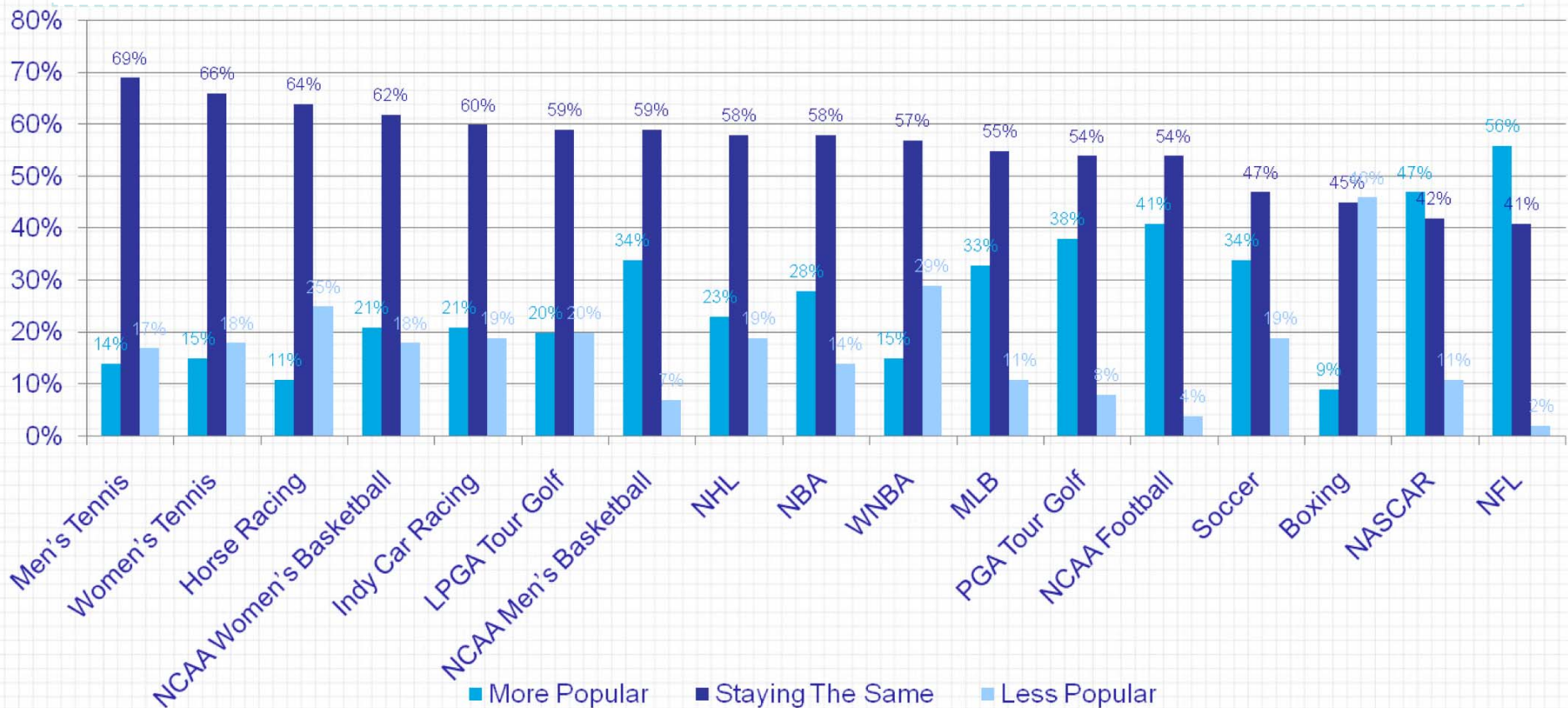
Top 3 Box
Scores of Total
Respondent Pool



Participate in Regularly



Popularity Over the Past Two to Three Years

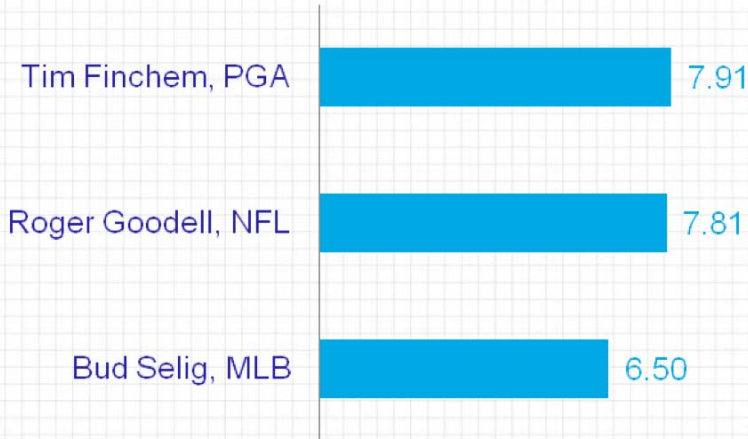


Popularity Over the Past Two to Three Years

	More Popular	Less Popular	Net Change in Popularity
NFL	56	2	54
NCAA Football	41	4	37
NASCAR	47	11	36
PGA Tour Golf	38	8	30
NCAA Men's Basketball	34	7	27
MLB	33	11	22
Soccer	34	19	15
NBA	28	14	14
NHL	23	19	4
NCAA Women's Basketball	21	18	3
Indy Car Racing	21	19	2
LPGA Tour Golf	20	20	0
Men's Tennis	14	17	-3
Women's Tennis	15	18	-3
Horse Racing	11	25	-14
WNBA	15	29	-14
Boxing	9	46	-37

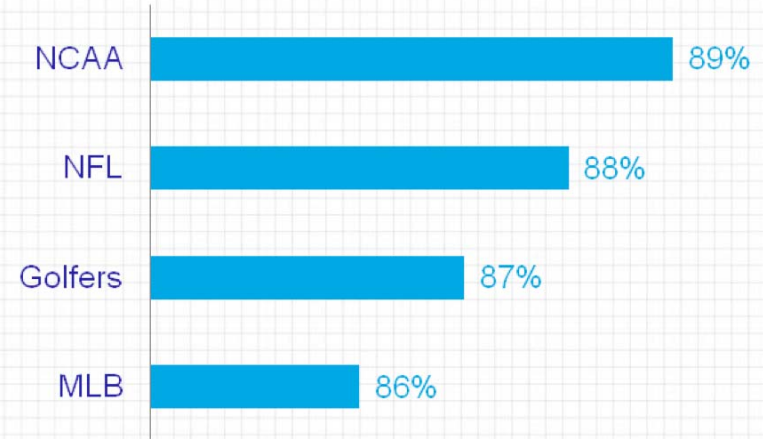
Commissioners and Rookies

Approval Rating for Commissioners



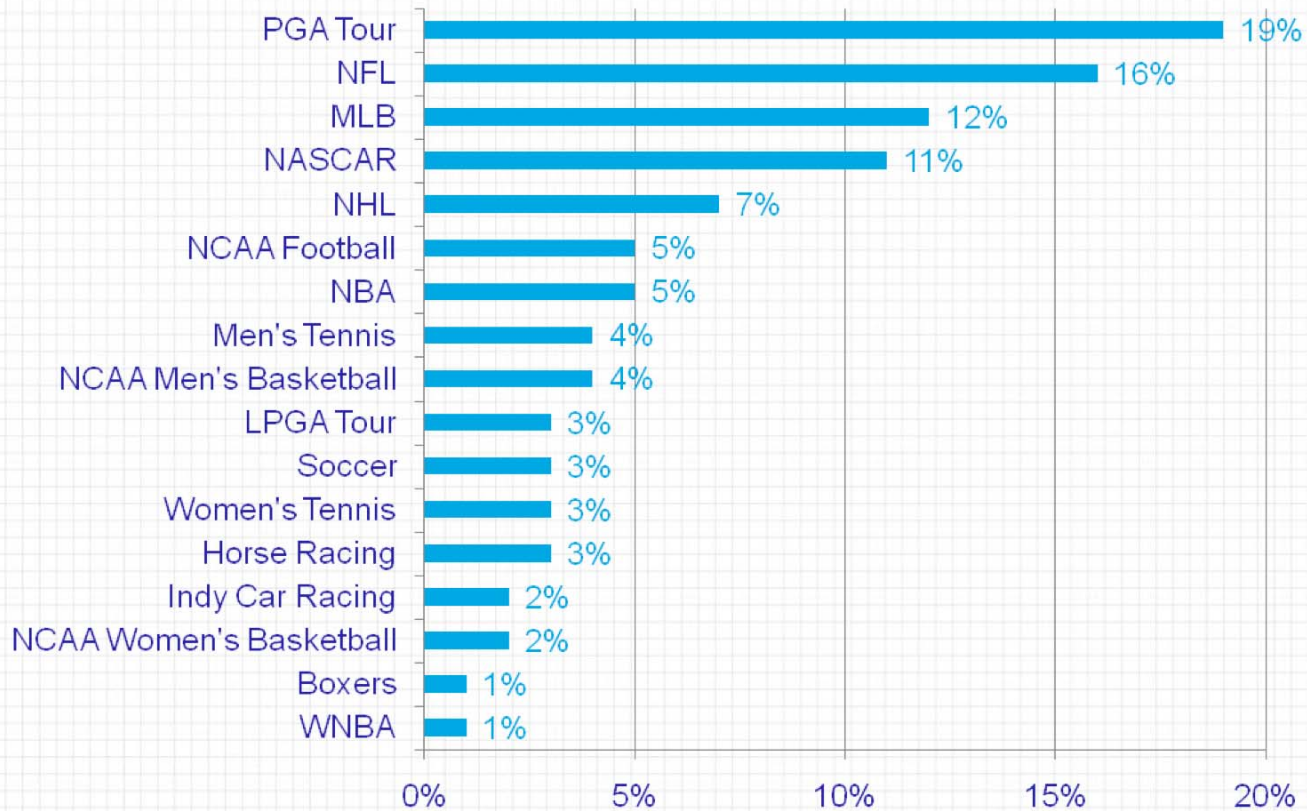
Mean Average of Fans of their Particular Sport

Rookie players should be allowed to enter the draft prior to graduating high school

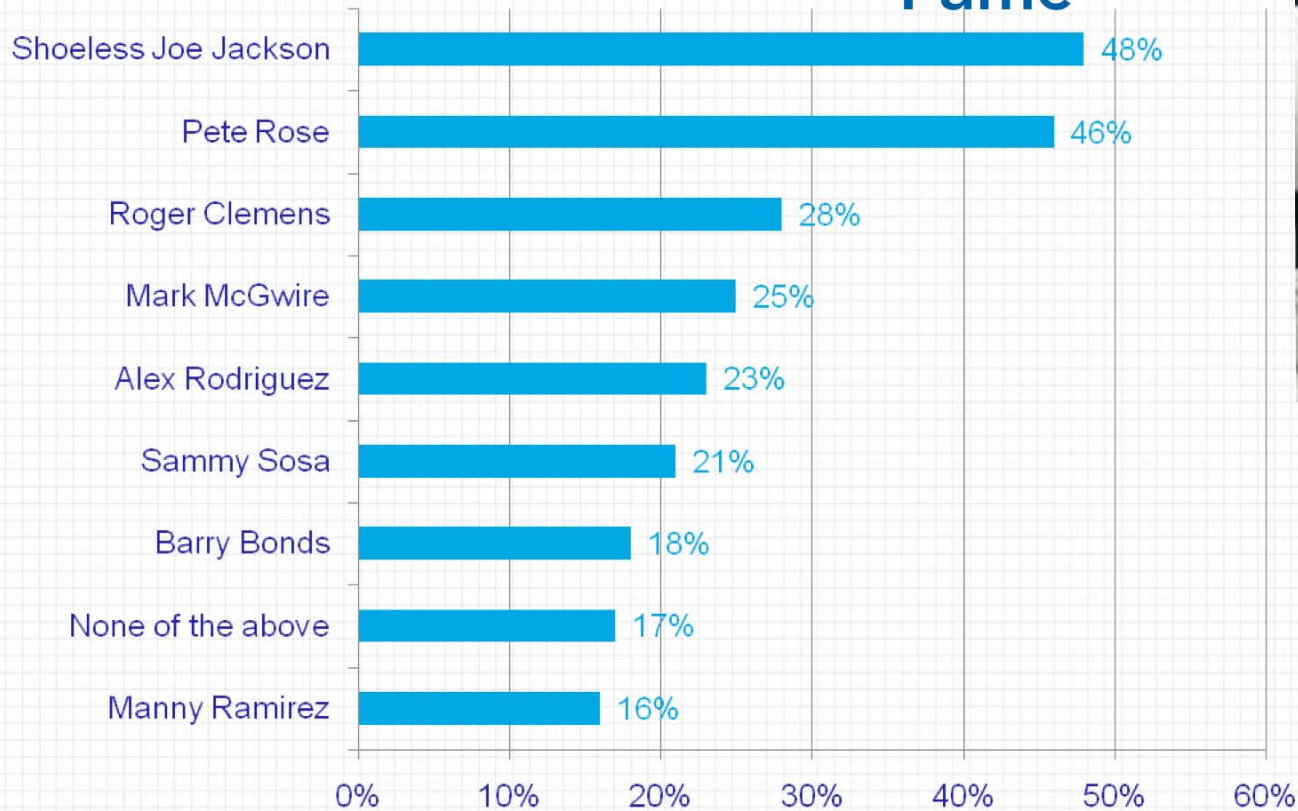


Percentage of Fans of their Particular Sport

Athletes Most Admired



MLB Players Who Should Be Inducted to Hall of Fame



Top 3 Box Score of Baseball Fans

MLB - Performance Enhancing Drugs, Gambling, Salary Caps --Top 3-Box Agreement

Recent disclosure of the use of performance enhancing drugs in baseball has made me less of a baseball fan	20%
I feel that the issue of performance enhancing drug usage among MLB players has been overblown	19%
When history looks back on the “Steroid Era” in baseball, the players of that era will be regarded just as highly as those of prior eras in MLB	18%
The full “list” of MLB players who tested positively for the use of performance enhancing drugs, referenced in the Mitchell report, should be released to the public	61%
Free agency in baseball has unfairly shifted the balance of power to just a handful of wealthier teams	54%
Major League Baseball should enact a salary cap	61%
Sports Gambling is a serious problem	34%
Pete Rose’s lifetime suspension from baseball should be lifted	50%
My impression of commissioner Selig would worsen if he were to lift Pete Rose’s lifetime ban	24%

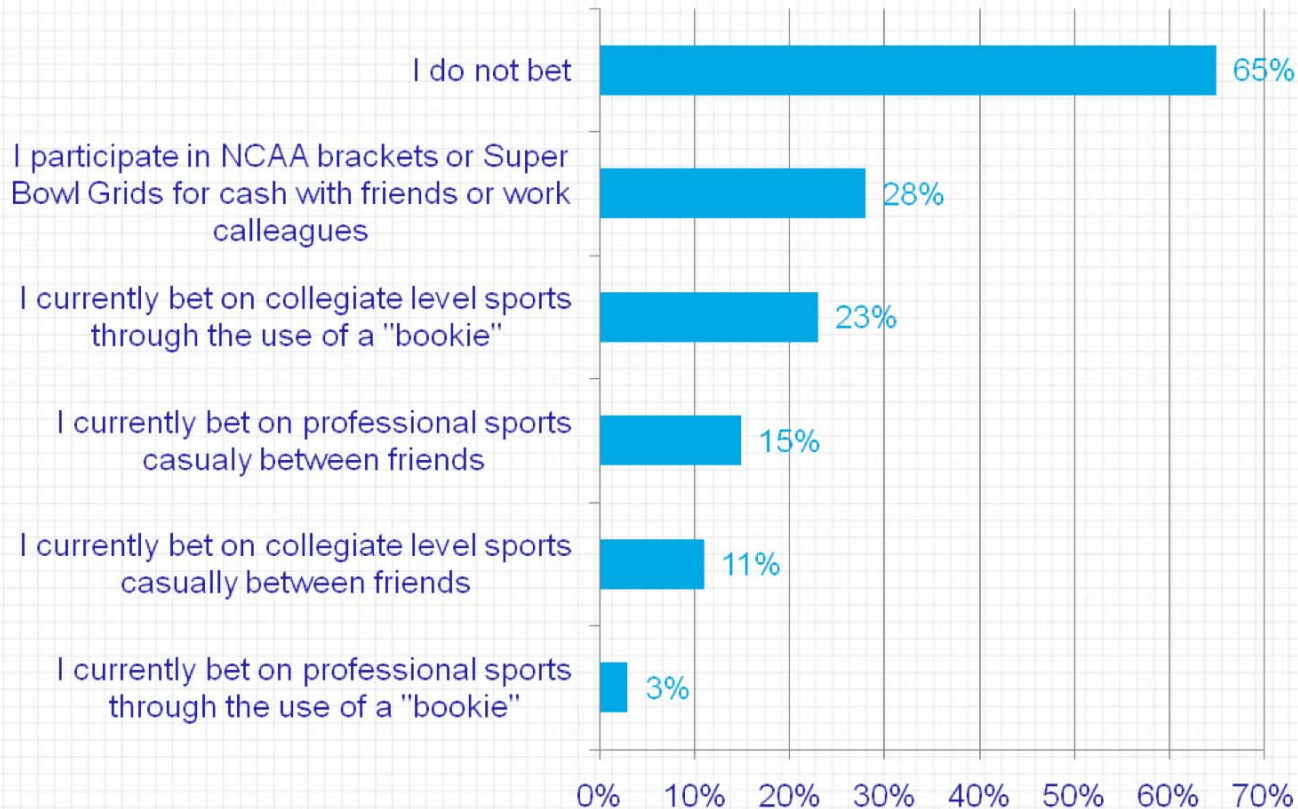
MLB – Interleague Play, All-Star Game, Umpires and Rules --Top 3 box agreement

Interleague play has been a positive for Major League Baseball	53%
The MLB baseball schedule should be more balanced, with less interdivisional games	23%
Awarding the winning league in the All-Star game with home field advantage in the World Series is a good thing for baseball	44%
I would love to see MLB and the networks move a World Series game to an afternoon	51%
In general, MLB umpires do an excellent job	56%
Instant replay has been a welcome addition to MLB baseball	57%

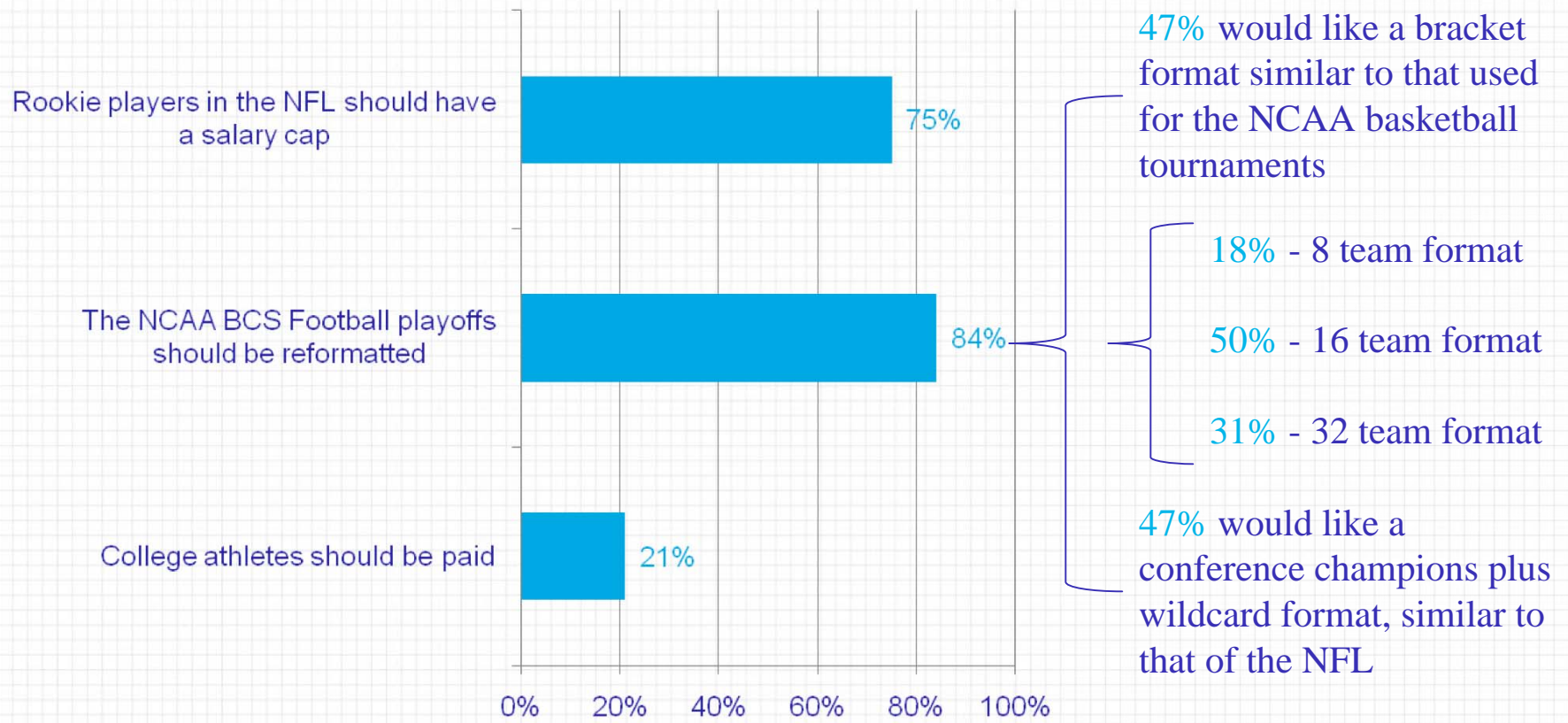
Sports Attitudes --Top 3 box agreement

Sports gambling leads to corruption of players and organizations	41%
The use of performance enhancing drugs has hurt the image of professional sports	71%
The use of performance enhancing drugs is becoming less important with the discovery of its widespread use	9%
Players should be banned from their respective Halls of Fame due to their use of performance enhancing drugs	54%
Sports gambling is harmless to the integrity of the game	13%
Corporate sponsorship has a place in professional sports	46%
Corporate sponsorship has a place in collegiate level sports	21%
Corporate advertising on the playing field/court is acceptable	34%
Corporations raise significant amounts of money for charity through their sponsorship of professional sports	35%
If I were a professional athlete, I would take performance enhancing drugs if I knew that I would not get caught	5%

Sports Gambling



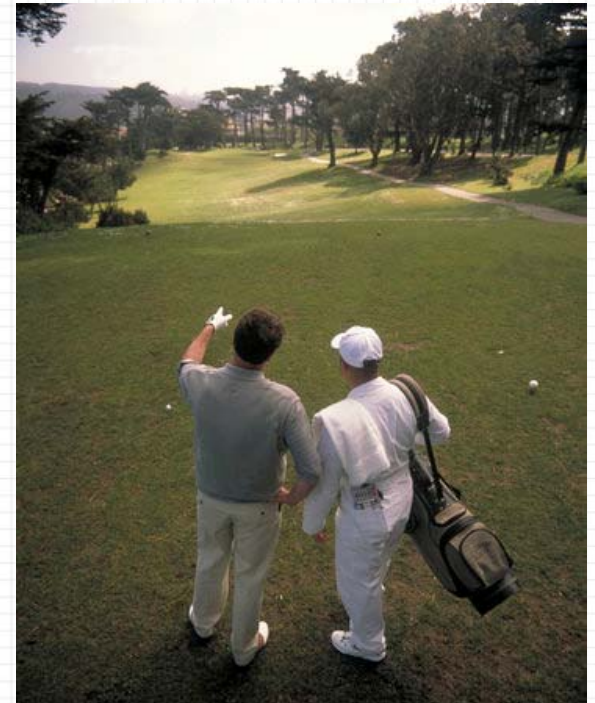
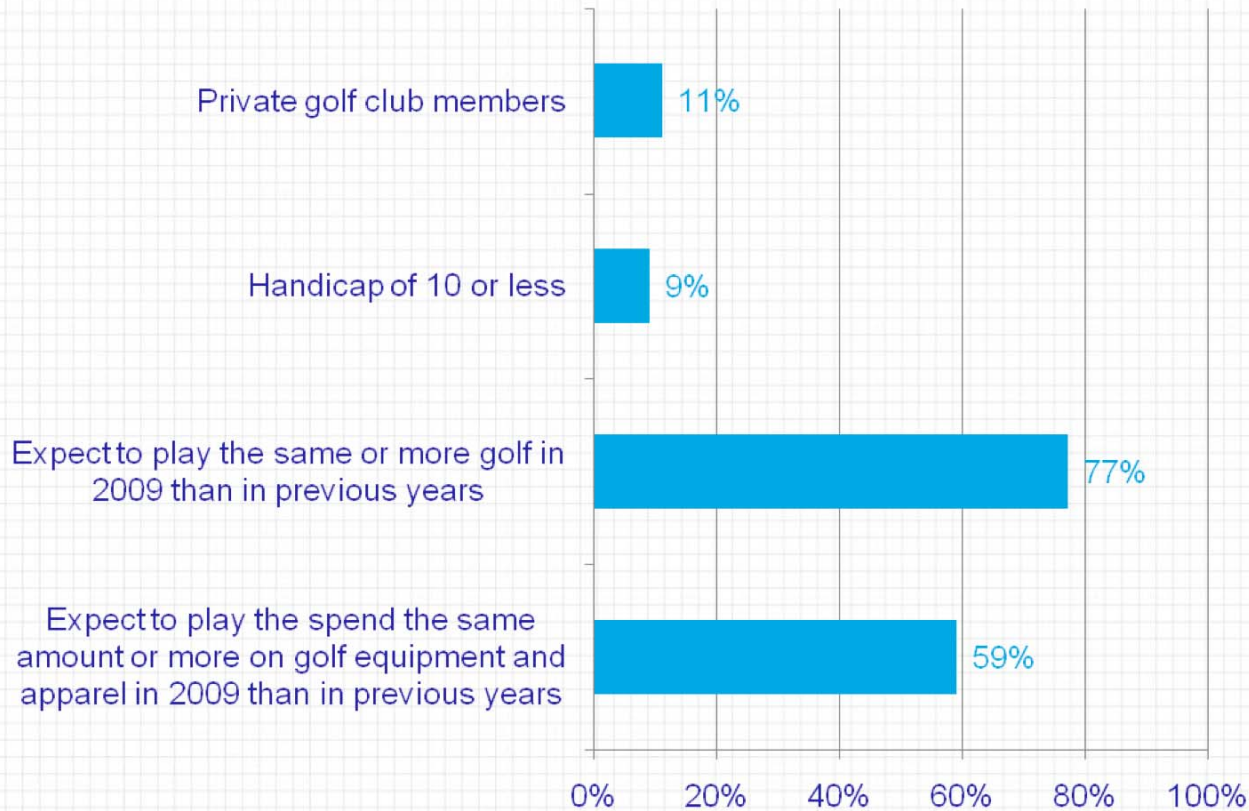
NFL and NCAA



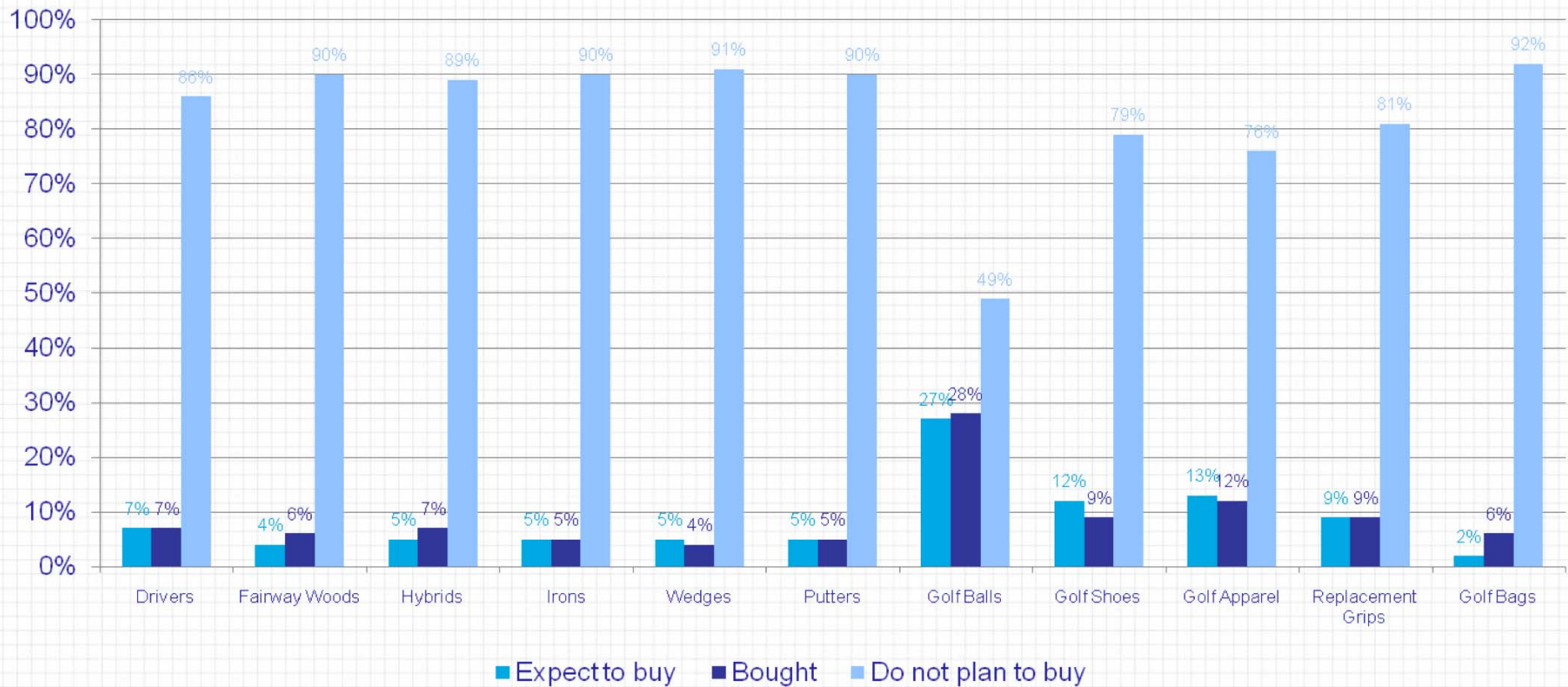
Key Take Aways: Golf

- Private club golfers expect to spend more money across the board than non-private club golfers, especially in the irons market, with the only exception in golf bags.
- Private club golfers also spent more money thus far, across the board, with the only exception being for hybrid clubs.
- Golfer spending on equipment in 2008 was higher than spending in 2009. However, golfers spent more money on apparel in 2009 than in 2008.
- More non-private club golfers are planning to make their next purchases in sporting goods stores than in 2008. The sporting goods channel has moved into a position of primacy for intended golf purchases in 2009.

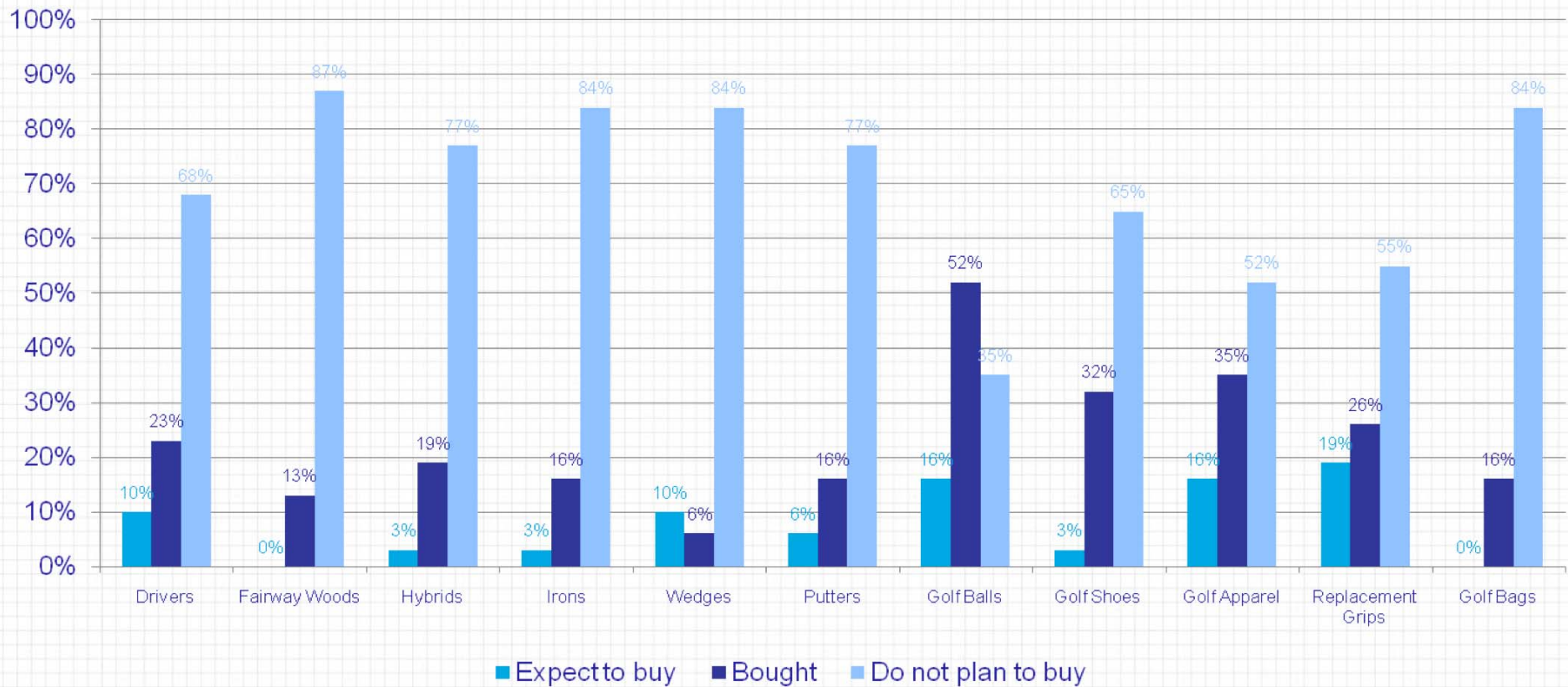
Golfers



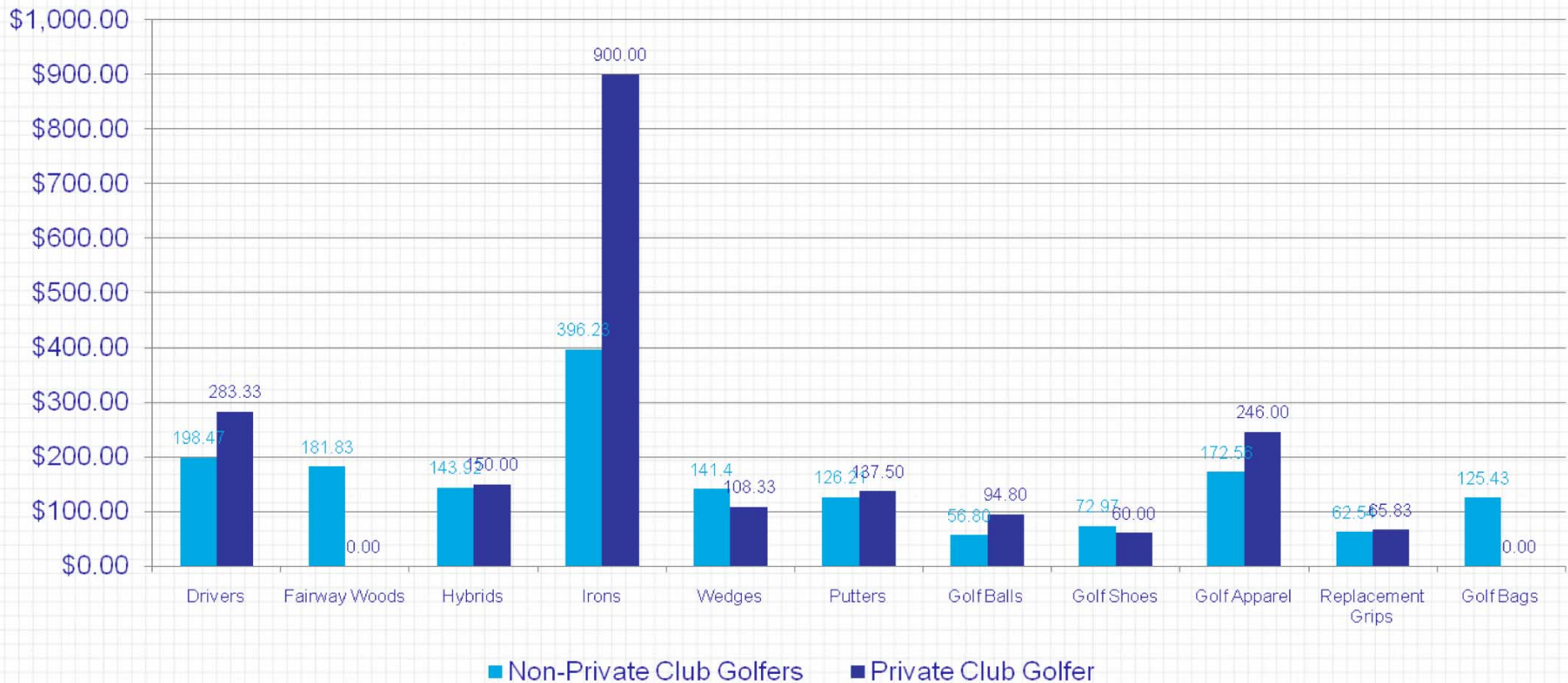
Equipment Spending: Non-Private Club Golfers



Equipment Spending: Private Club Golfers



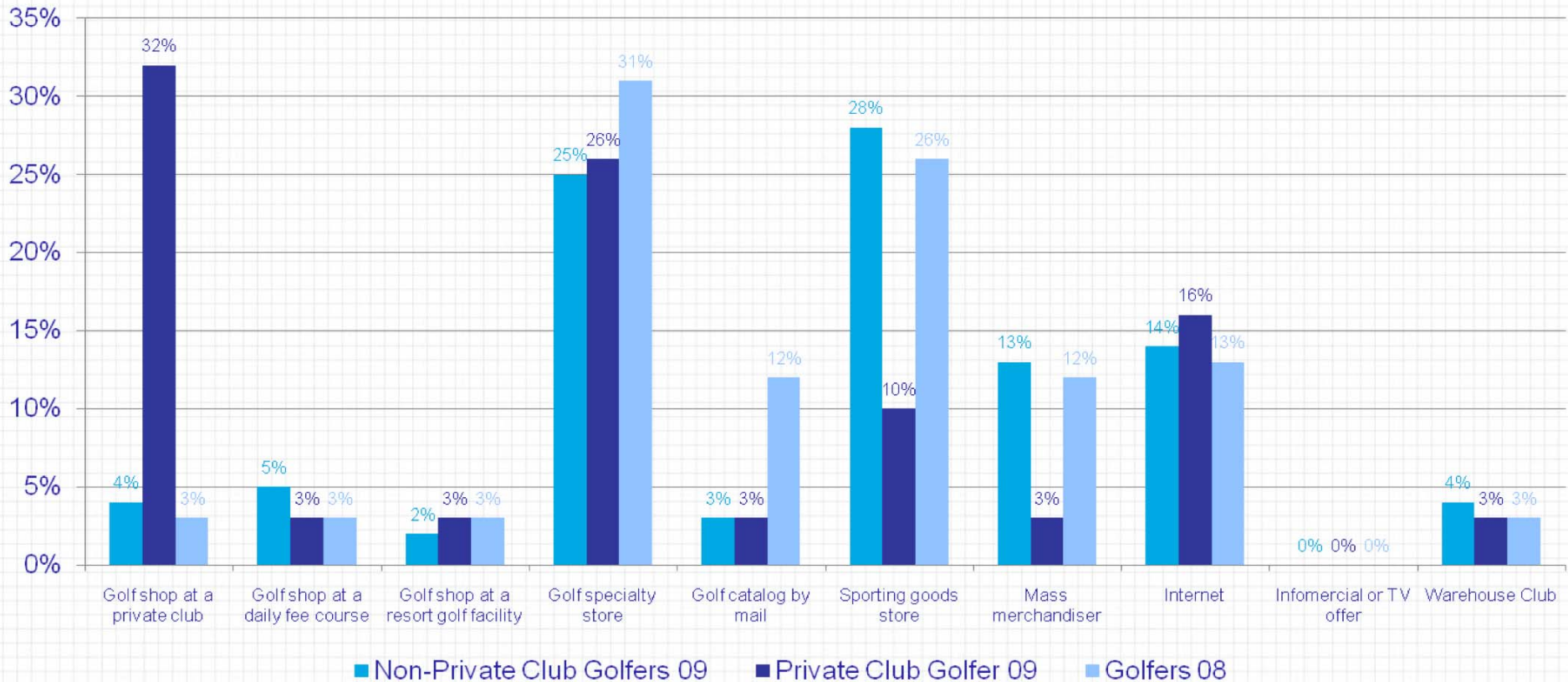
How Much Do You Expect to Spend in 2009



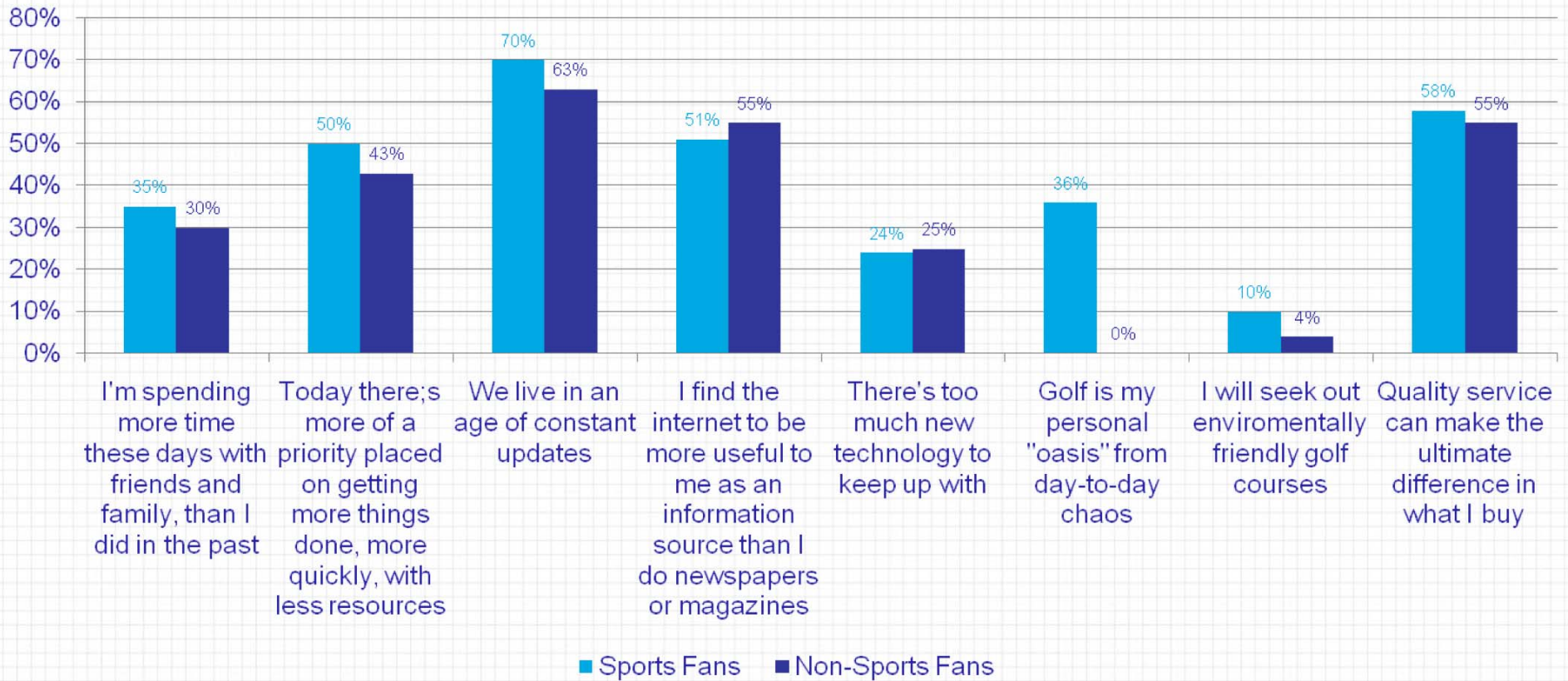
How Much Did You Spend in 2009 Versus 2008



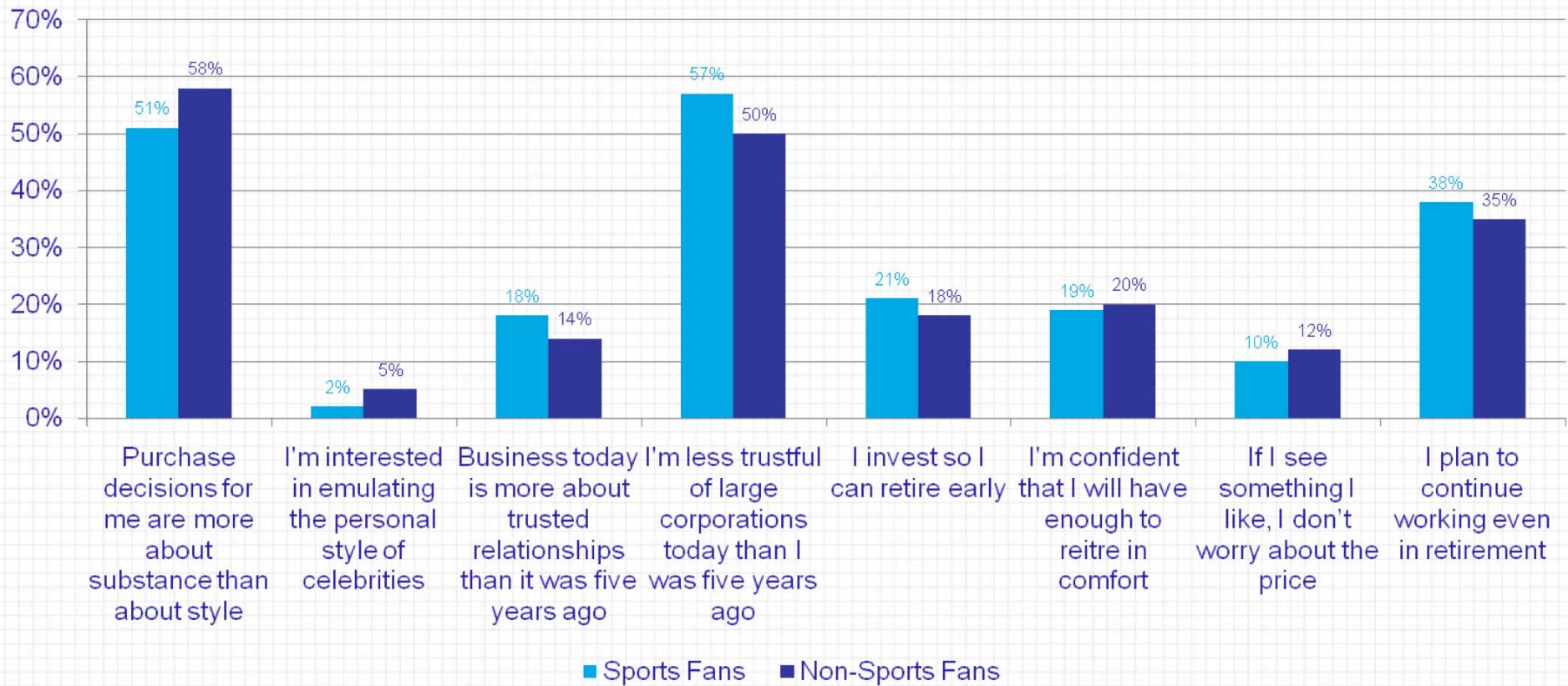
Where Do You Plan to Make Your Next Purchase



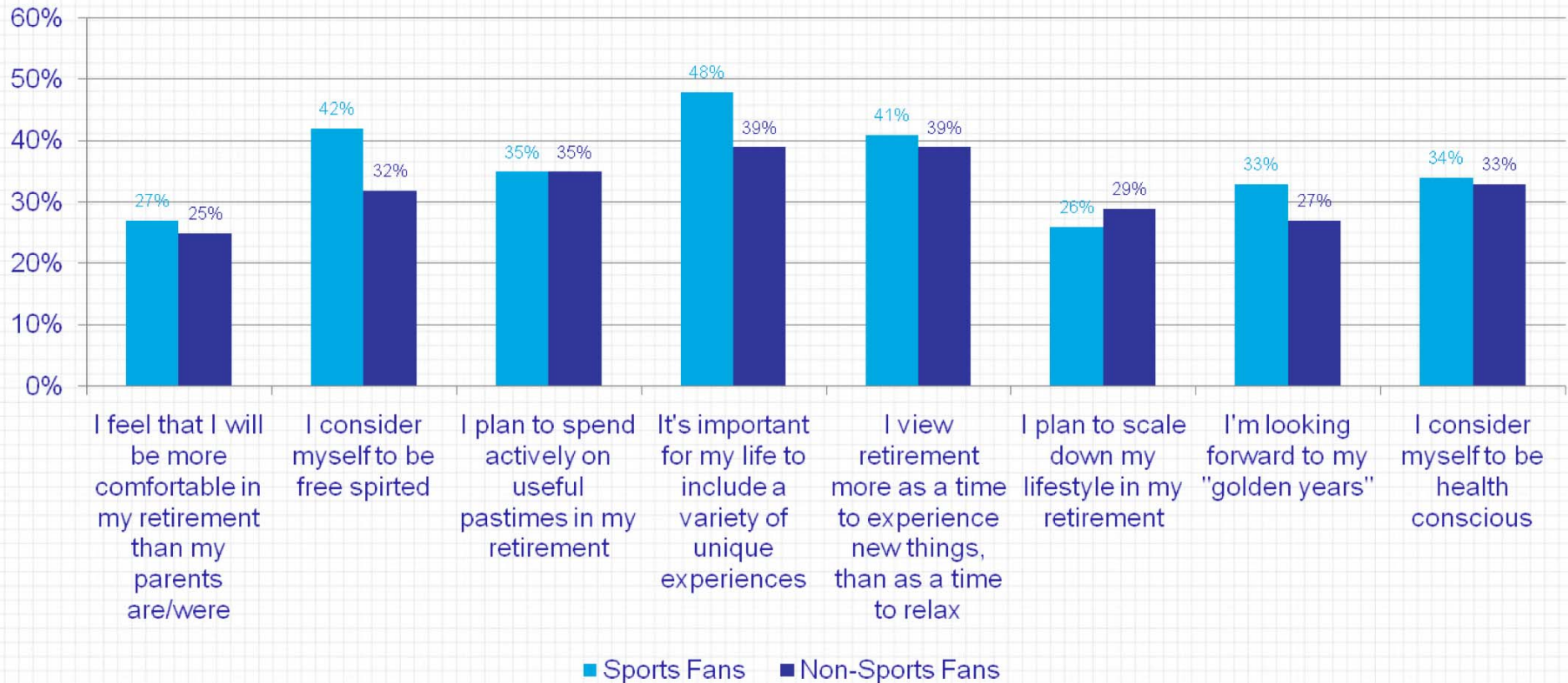
General Attitudes



General Attitudes



General Attitudes



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