

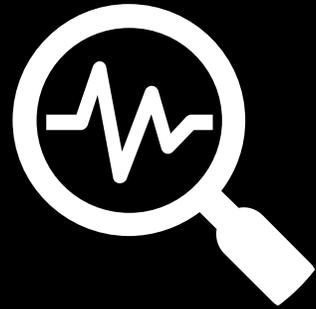


The Impact of Coronavirus on American Sports Fans

CELEBRATING **25 YEARS** OF SPORTS INTELLIGENCE

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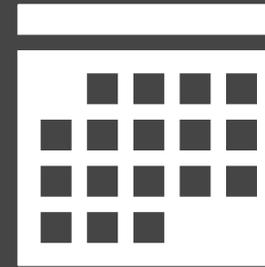
About This Research



The Coronavirus crisis has created unprecedented challenges for the sports and leisure industry. To help our clients and partners monitor and respond to the issues, SSRS has begun conducting research measuring the impact of the crisis on Americans.



All data in this report was collected from March 10-15, 2020 on the SSRS Omnibus, a nationally representative phone sample of 1,006 Americans age 18 and up.



Given the fast pace of the change during this crisis, we analyze shifting opinions and behavior during the course of a single week using two-day segments. We are able to compare March 10-11 to March 12-13 and March 14-15 to demonstrate this rapid progression throughout the report.



We will periodically update this research in the coming weeks and months to keep you abreast of changes in Americans' behavior and opinions as it relates to the Coronavirus.

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Insights Summary

1

America changed dramatically during the course of the past week.

- 57% of Americans were spending **more time at home** (up from 37% earlier in the week)
- 54% had **changed plans to attend** public events (up from 23% earlier in the week)
- 17% had begun to **shop online** more often (up from 10% earlier in the week)
- 29% said they were **saving more money** (up from 17% earlier in the week)

2

Sports made the right decision at the right time.

- **54% said sports should cancel** games until the risk subsides (up from 30% at the beginning of the week).
- **Only 7%** said sports should continue playing in front of crowds (down from 30%).

3

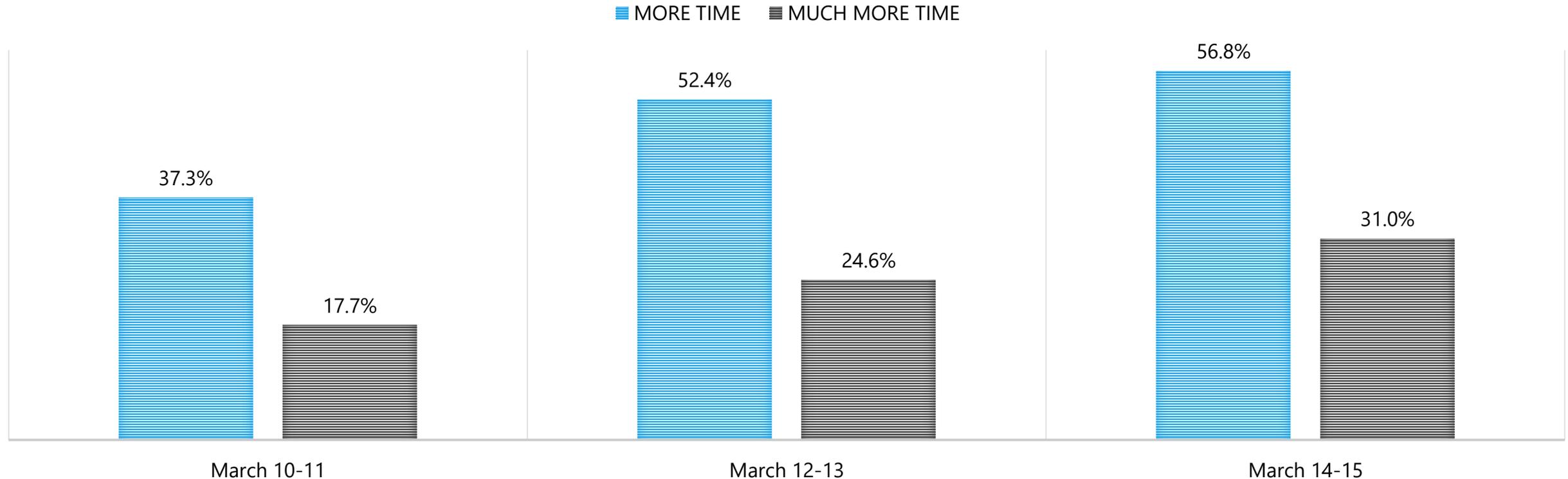
More than half of Americans want sports as an escape from the news.

- **AVID sports fans are missing a critical diversion** when they need it most.
- **More than half of all Americans** say they would be likely to watch sports as an escape from the news today. They said this even after most leagues had postponed seasons.
- Of note, **AVID sports fans** use sports as an escape more than any other activity.

Americans are Spending Significantly More Time at Home

One week made a huge difference for Americans. At the start of the week, **37% of Americans said they were spending more time at home because of coronavirus news.** By week's end, 57% were spending more time. The number of Americans saying they were spending much more time nearly doubled from 18% to 31%.

% OF POPULATION WHO ARE SPENDING ... AT HOME



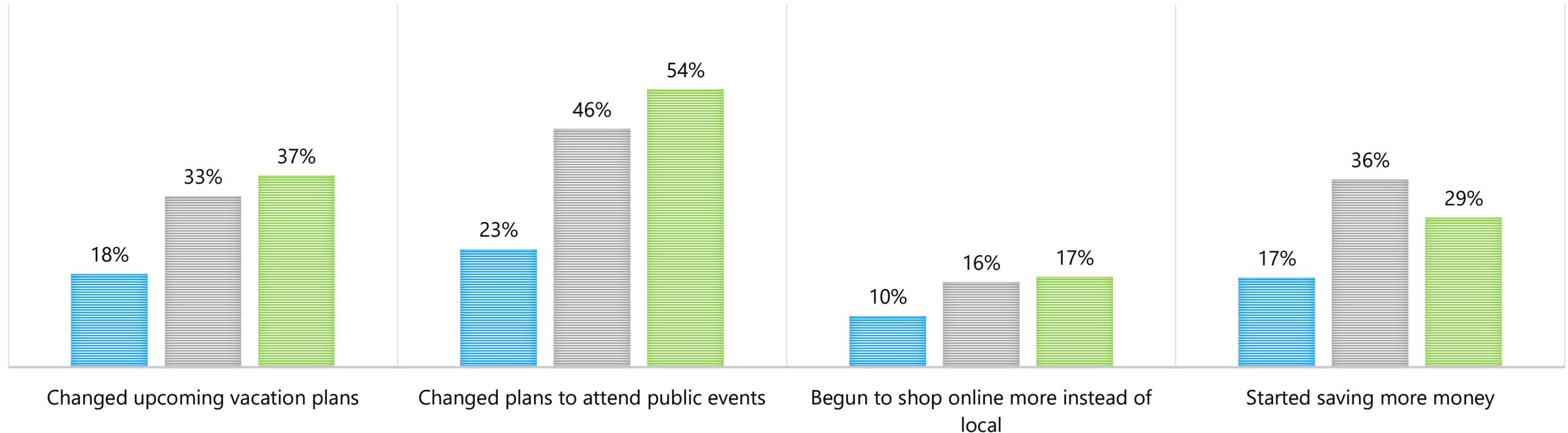
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American Behaviors Changed Over the Course of One Week

We saw **significant increases** during the week in changing vacation plans, plans to attend public events, shopping online, and saving money.

BECAUSE OF CORONAVIRUS NEWS, HAVE YOU...

■ March 10-11, 2020 ■ March 12-13, 2020 ■ March 14-15, 2020



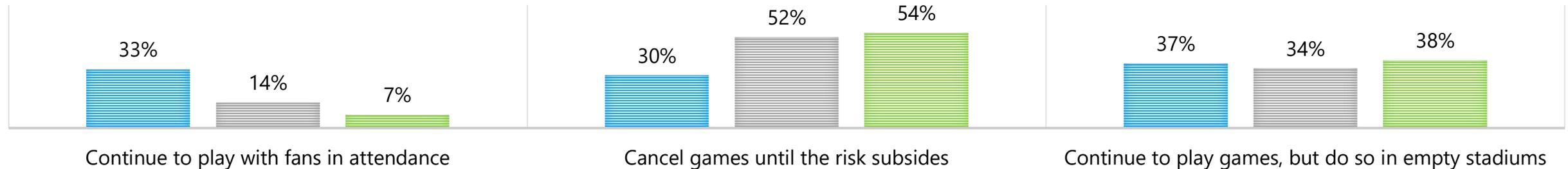
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Sports Made the Right Decision to Cancel Games, but There is Still a Desire for “Crowdless” Games

When the week started, Americans were almost evenly split on whether sports should continue with the status quo, play games without crowds, or cancel games for the time being. By the end of the week, a **majority said sports should cancel games** and only 7% favored continuing with fans in attendance.

DO YOU THINK SPORTS SHOULD...

■ March 10-11 ■ March 12-13 ■ March 14-15



TIMELINE

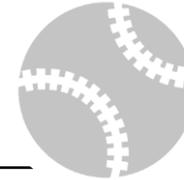
March 11 (late)

- NBA postpones season



March 12

- NCAA conference tournaments cancelled
- NHL postpones season
- MLB suspends operations



March 13

- PGA cancels Players Championship
- NASCAR postpones season
- NCAA cancels March Madness



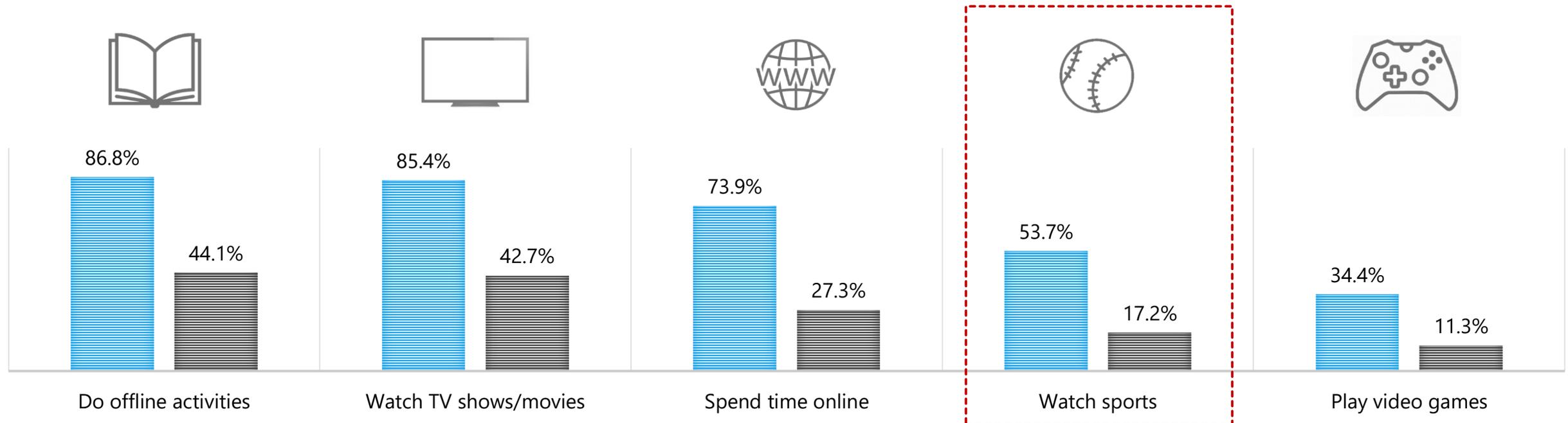
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More Than Half of Americans Say They are Likely to Watch Sports to Escape From the News

What will Americans do when they are stuck at home and want to get away from the news? Offline activities (e.g. reading), watching TV, and spending time online are the top choices for Americans overall. **Over half say they would be likely to watch sports to escape from the news.**

ACTIVITIES TO TAKE MIND OFF NEWS

■ Very/Somewhat/Little Bit Likely ■ Very Likely

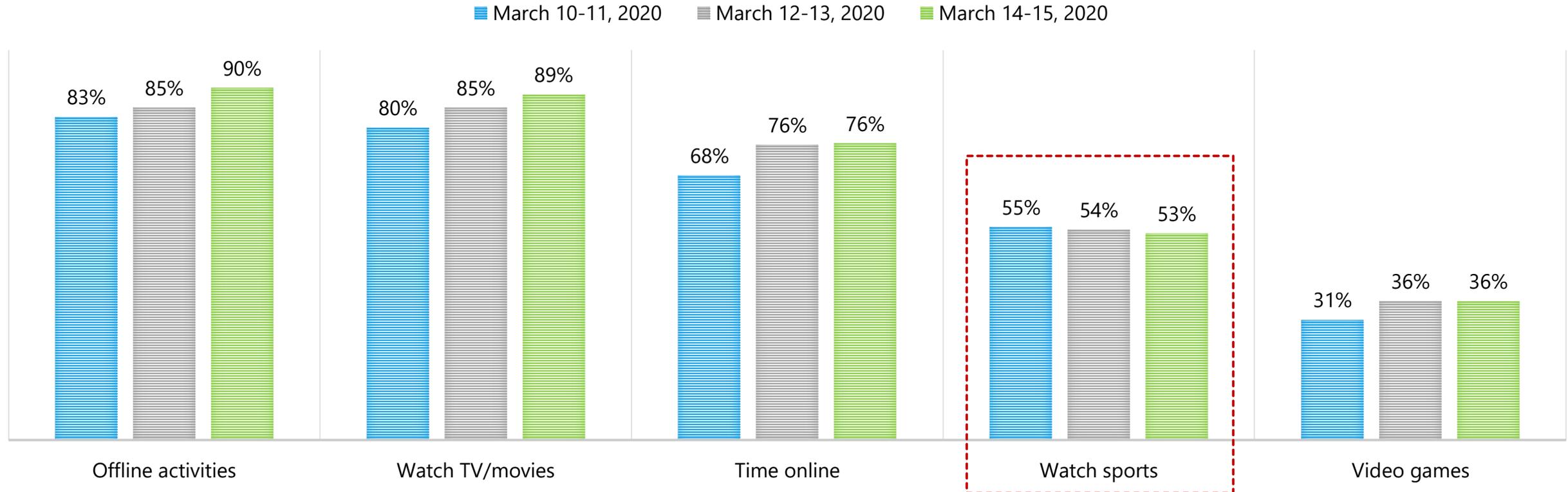


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Even After Seasons Were Postponed, Americans Still Crave Sports as a Distraction

Even after the NBA, NHL, MLB, NCAA and others had postponed their seasons, **more than half of all Americans** still said they wanted to watch sports as a way to take their mind off the news.

% LIKELY TO ... AS A WAY TO TAKE YOUR MIND OFF THE NEWS



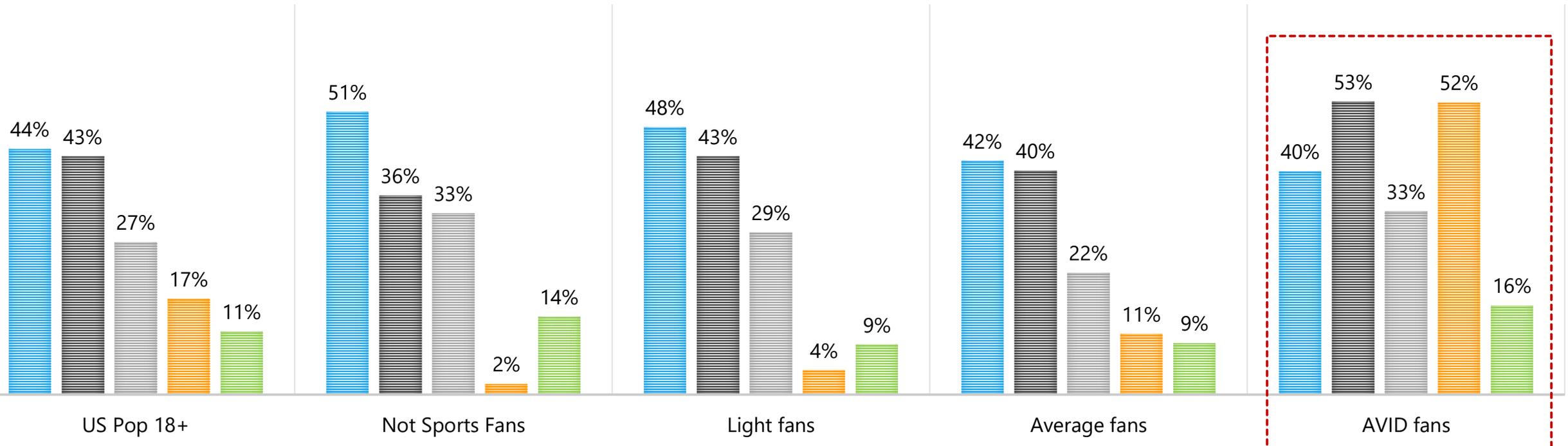
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AVID Sports Fans are Missing a Critical Part of Their Lives at a Time When They Need it Most

More than half of all AVID sports fans say that they are very likely to watch sports as a way to take their mind off the news. **Almost 83% say they are likely to watch sports** to get away from the news. These fans are missing a critical part of their lives at a time when they most need it. We need to be more creative in finding ways to keep them engaged until sports can return.

% VERY LIKELY TO ... AS A WAY TO TAKE YOUR MIND OFF THE NEWS

Offline TV/movies Online Watch sports Video games

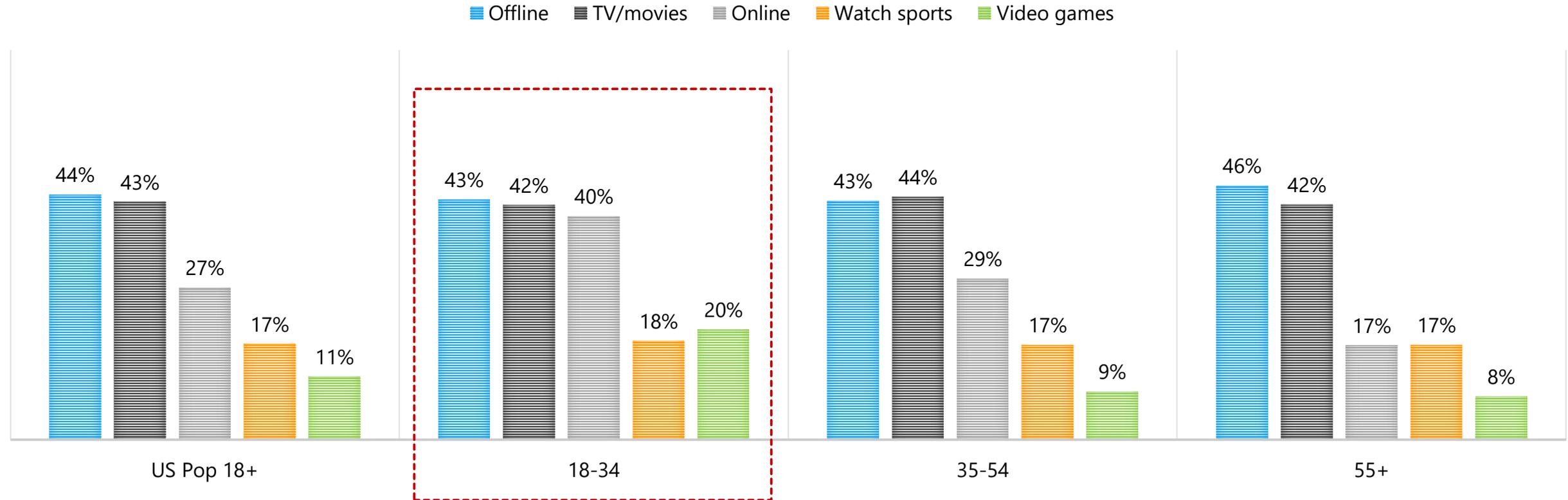


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The Longer Sports is Away, the More Likely Young Americans Will Turn to Something Else

If we look more closely by age, the **youngest Americans (18-34) are more likely** to have other options to get away. Not only are they likely to choose offline activities and TV/movies (like people over 35), but gaming and time online are options as well. This age group has already lost significant interest in sports over time. The longer sports is away, the more likely it is they will find other things to take its place.

% VERY LIKELY TO ... AS A WAY TO TAKE YOUR MIND OFF THE NEWS



Data in this report was collected from March 10-15, 2020 on the SSRS Omnibus, a nationally representative phone sample of 1,006 Americans age 18 and up.



Appendix: Demographic Comparisons

The following slides include demographic comparisons for each question. Note that these numbers cover the full week. As the previous slides show, we did see significant changes over the course of the week, so please keep that in mind as you look at the comparisons.



Right now,
because of the
coronavirus news,
are you spending
more or less time
at home?

	More (NET)	Less (NET)
US Population	50.6%	7.2%
Male	46.0%	7.8%
Female	54.8%	6.7%
Age 18-34	51.9%	11.2%
Age 35-54	52.7%	5.1%
Age 55+	47.8%	6.3%
Not Sports Fan	43.4%	10.7%
Light Sports Fan	54.0%	5.1%
Average Sports Fan	51.0%	7.1%
AVID Sports Fan	51.4%	7.2%
White Non Hispanic	46.9%	6.5%
Black Non Hispanic	63.9%	7.9%
Hispanic	46.5%	11.0%

	More (NET)	Less (NET)
Under \$30K income	51.2%	11.8%
\$30K-\$49K income	47.0%	4.5%
\$50K-\$99K income	50.0%	5.2%
Over \$100K income	51.8%	6.7%
Republican (lean)	39.8%	8.9%
Democrat (lean)	60.7%	4.8%
Independent/Other	40.0%	12.0%
Interview Date: March 10-11	37.3%	6.6%
Interview Date: March 12-13	52.4%	8.3%
Interview Date: March 14-15	56.8%	6.7%

How important is it for you to engage in activities to take your mind off the news these days?

	Very Important	Somewhat Important	A Little Bit Important	Not At All Important
US Population	18.6%	29.8%	18.6%	32.9%
Male	18.2%	24.6%	18.7%	38.5%
Female	19.0%	34.7%	18.6%	27.7%
Age 18-34	21.6%	34.9%	13.2%	30.3%
Age 35-54	18.5%	30.5%	22.4%	28.6%
Age 55+	16.7%	25.7%	19.1%	38.5%
Not Sports Fan	15.6%	29.5%	14.8%	40.1%
Light Sports Fan	17.3%	26.4%	19.6%	36.6%
Average Sports Fan	19.1%	32.1%	18.9%	30.0%
AVID Sports Fan	21.2%	28.6%	19.9%	30.3%
White Non Hispanic	16.7%	29.2%	20.6%	33.4%
Black Non Hispanic	17.2%	34.7%	13.8%	34.3%
Hispanic	27.6%	31.5%	14.6%	26.2%
Under \$30K income	18.5%	38.7%	17.3%	25.5%
\$30K-\$49K income	16.9%	23.2%	19.9%	40.0%
\$50K-\$99K income	20.1%	29.5%	22.2%	28.2%
Over \$100K income	18.5%	26.9%	13.3%	41.3%
Republican (lean)	12.8%	24.2%	20.0%	42.9%
Democrat (lean)	22.9%	32.9%	18.5%	25.7%
Independent/Other	18.3%	33.4%	15.1%	33.2%
Interview Date: March 10-11	15.6%	24.8%	22.2%	37.5%
Interview Date: March 12-13	22.9%	25.9%	17.3%	33.8%
Interview Date: March 14-15	17.2%	35.6%	17.6%	29.6%



How likely are you to ... as a way to take your mind off the news?

% VERY LIKELY



	Watch Sports	Watch TV Shows or Movies	Play Video Games	Spend Time Online
US Population	17.2%	42.7%	11.3%	27.3%
Male	26.5%	38.8%	13.5%	27.7%
Female	8.6%	46.3%	9.3%	27.0%
Age 18-34	17.7%	42.2%	19.8%	40.1%
Age 35-54	17.0%	43.6%	8.7%	29.0%
Age 55+	17.0%	42.2%	7.8%	17.0%
Not Sports Fan	1.9%	35.7%	14.0%	32.5%
Light Sports Fan	4.4%	42.7%	9.0%	29.1%
Average Sports Fan	10.9%	40.1%	9.2%	21.8%
AVID Sports Fan	52.4%	52.5%	16.0%	32.9%
White Non Hispanic	15.4%	38.7%	10.6%	24.8%
Black Non Hispanic	24.2%	51.7%	13.0%	24.4%
Hispanic	21.4%	56.6%	12.2%	33.9%
Under \$30K income	15.3%	44.7%	13.4%	23.0%
\$30K-\$49K income	16.5%	43.9%	9.5%	26.5%
\$50K-\$99K income	19.7%	41.5%	12.1%	29.5%
Over \$100K income	14.9%	42.6%	7.0%	30.2%
Republican (lean)	18.3%	35.2%	9.0%	24.5%
Democrat (lean)	17.3%	49.8%	13.1%	28.0%
Independent/Other	13.5%	35.6%	10.8%	32.9%
Interview Date: March 10-11	19.7%	38.8%	11.0%	24.0%
Interview Date: March 12-13	17.3%	44.4%	12.6%	29.4%
Interview Date: March 14-15	15.6%	43.7%	10.6%	27.7%

How likely are you to ... as a way to take your mind off the news?

% LIKELY (Little bit, Somewhat, or Very)



	Watch Sports	Watch TV Shows or Movies	Play Video Games	Spend Time Online
US Population	53.7%	85.4%	34.4%	73.9%
Male	58.8%	82.5%	42.6%	72.0%
Female	49.0%	88.1%	26.8%	75.7%
Age 18-34	52.6%	81.2%	52.9%	80.5%
Age 35-54	56.2%	89.8%	34.1%	79.8%
Age 55+	52.3%	84.4%	22.0%	64.3%
Not Sports Fan	10.8%	80.2%	26.4%	67.4%
Light Sports Fan	32.2%	83.7%	32.7%	72.9%
Average Sports Fan	64.8%	86.6%	33.1%	73.7%
AVID Sports Fan	82.6%	88.5%	44.3%	79.7%
White Non Hispanic	49.8%	85.7%	31.7%	71.7%
Black Non Hispanic	66.2%	89.8%	39.3%	78.4%
Hispanic	58.7%	86.4%	40.8%	80.3%
Under \$30K income	49.6%	85.7%	40.4%	71.4%
\$30K-\$49K income	55.9%	88.3%	31.4%	73.7%
\$50K-\$99K income	60.4%	86.8%	33.1%	77.8%
Over \$100K income	48.8%	81.4%	30.0%	76.9%
Republican (lean)	52.0%	81.3%	30.9%	69.6%
Democrat (lean)	55.1%	89.6%	36.0%	78.3%
Independent/Other	53.2%	80.1%	38.2%	68.6%
Interview Date: March 10-11	54.6%	80.1%	30.8%	67.9%
Interview Date: March 12-13	53.9%	85.3%	35.6%	75.7%
Interview Date: March 14-15	53.0%	88.6%	35.6%	76.1%

There is a chance that some sports may either cancel games or play games in empty stadiums if the threat of the coronavirus increases.

Do you think sports should...?



	Continue to play games with fans in attendance	Cancel games until the risk subsides	Continue to play games, but in empty stadiums
US Population	16.2%	47.3%	36.5%
Male	17.9%	41.7%	40.4%
Female	14.5%	52.6%	32.8%
Age 18-34	11.1%	37.5%	51.4%
Age 35-54	14.6%	51.0%	34.4%
Age 55+	21.2%	50.5%	28.3%
Not Sports Fan	N/A	N/A	N/A
Light Sports Fan	15.5%	45.7%	38.9%
Average Sports Fan	16.5%	47.6%	35.9%
AVID Sports Fan	16.2%	48.3%	35.5%
White Non Hispanic	19.6%	44.2%	36.2%
Black Non Hispanic	7.3%	55.4%	37.3%
Hispanic	8.5%	56.6%	34.8%
Under \$30K income	10.0%	49.1%	40.8%
\$30K-\$49K income	22.0%	43.9%	34.1%
\$50K-\$99K income	18.6%	50.8%	30.6%
Over \$100K income	14.7%	38.3%	46.9%
Republican (lean)	25.9%	42.3%	31.7%
Democrat (lean)	8.7%	51.6%	39.7%
Independent/Other	18.9%	43.6%	37.5%
Interview Date: March 10-11	33.3%	30.0%	36.7%
Interview Date: March 12-13	14.4%	51.7%	33.9%
Interview Date: March 14-15	7.5%	54.1%	38.5%

Because of coronavirus news, have you done any of the following?

% YES



	Changed upcoming vacation plans	Changed plans to attend public events	Begun to shop online more instead of local stores	Started saving more money
US Population	30.9%	43.4%	15.2%	28.3%
Male	28.8%	39.4%	14.0%	28.5%
Female	32.9%	47.0%	16.3%	28.2%
Age 18-34	31.3%	50.0%	18.5%	33.3%
Age 35-54	37.4%	44.7%	17.1%	31.7%
Age 55+	25.0%	37.6%	11.4%	21.9%
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Average Sports Fan	33.2%	44.5%	17.8%	29.8%
AVID Sports Fan	35.7%	47.3%	16.3%	33.7%
White Non Hispanic	27.5%	40.1%	14.4%	25.6%
Black Non Hispanic	39.6%	46.6%	21.3%	30.3%
Hispanic	36.1%	48.7%	15.4%	40.0%
Under \$30K income	22.9%	45.7%	15.3%	27.0%
\$30K-\$49K income	27.2%	39.1%	11.5%	28.7%
\$50K-\$99K income	39.1%	44.3%	18.6%	29.8%
Over \$100K income	35.1%	45.7%	16.4%	24.2%
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Democrat (lean)	38.1%	48.4%	17.5%	32.7%
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