

Gemba

GETTING BACK TO LIVE SPORT: WHAT FANS ARE THINKING ABOUT RETURNING TO GAMES?

COVID-19 SPORTS INSIGHTS

20 APRIL 2020

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INSIGHTS

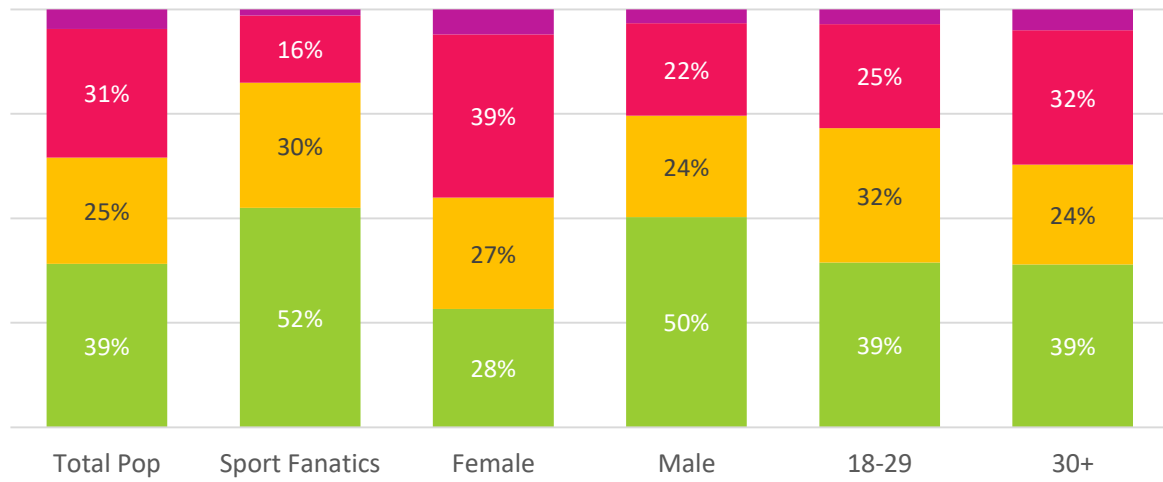


WHAT FANS ARE THINKING ABOUT RETURNING TO GAMES?

1. We are a long way from a return to normal. 33% of sports fanatics (and 41% of the Australian population) say they **would not feel safe** attending a game before a vaccine for COVID-19 was developed
2. While most Australians say they are missing live sport, worryingly 16% of sports fanatics say they are **not missing it at all**. Will they return as fans when sport restarts?
3. Australians are uncertain about when and how live sport should return. While 23% of Australians feel no sport should be played at all in 2020, 33% feel comfortable for it to be played without fans present, and 38% think sport should eventually be played in 2020, but with most of those looking for restrictions on attendance and practising social distancing

39% OF AUSTRALIANS, AND HALF OF AUSTRALIAN MALES, ARE MISSING LIVE SPORT A LOT DURING THE SHUTDOWN

How much are you missing live sport?



Worryingly, 16% of sports fanatics say they are not missing the opportunity to watch live sports

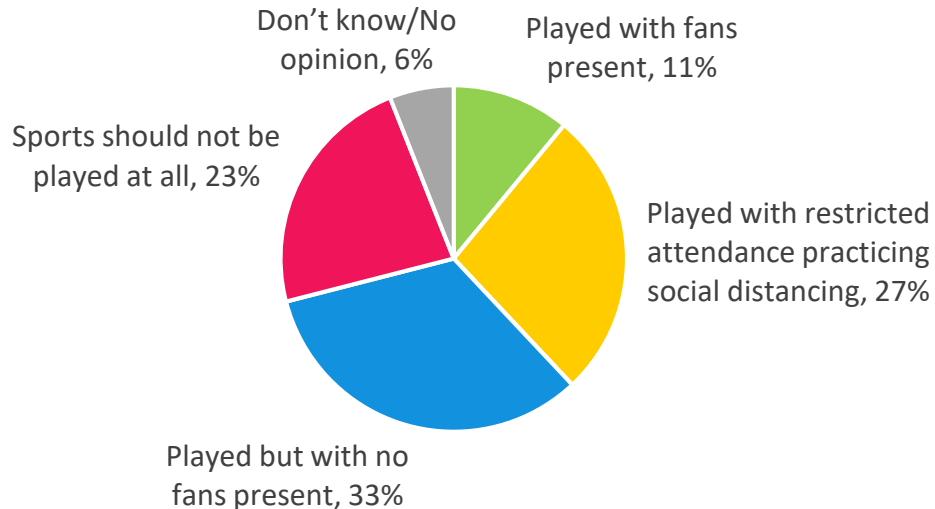
- Don't know/No opinion
- Not at all
- Some
- Very much

Q. How much would you say you miss having the opportunity to watch live sports?

A SLIGHT MAJORITY THINK EITHER NO SPORTS SHOULD BE PLAYED IN 2020, OR AT BEST PLAYED WITH NO FANS PRESENT

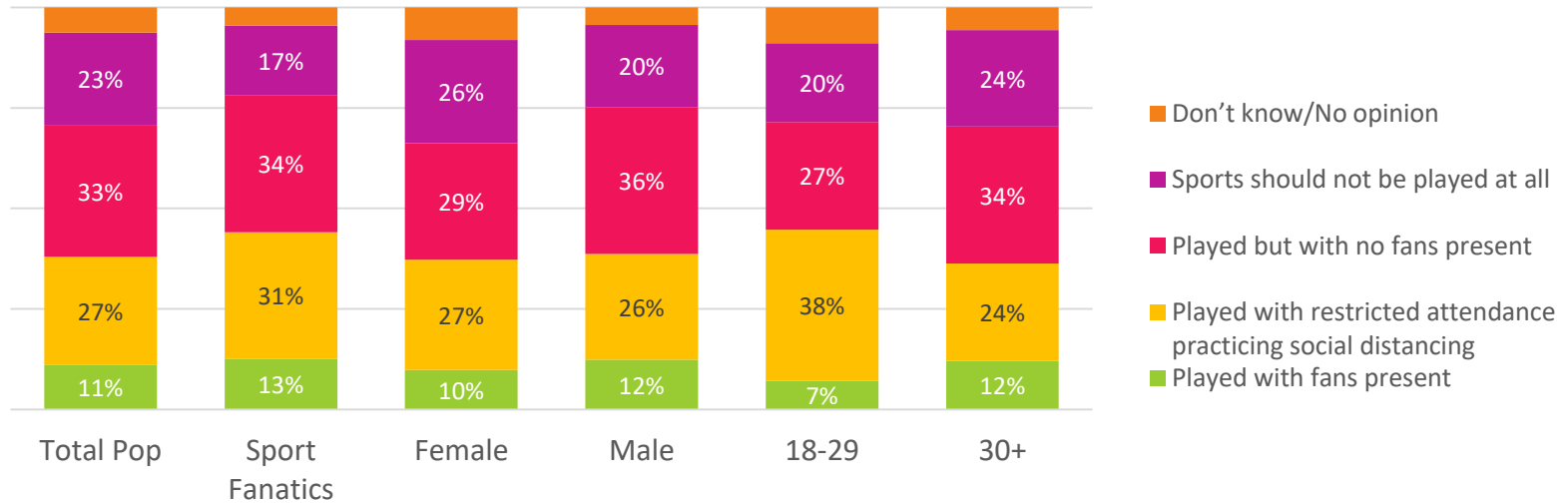
Australians' feelings towards live sport returning in 2020

“For the remainder of 2020, do you think sports should eventually be...?”



YOUNGER PEOPLE AND SPORTS FANATICS ARE SLIGHTLY MORE BULLISH ABOUT SPORT BEING PLAYED IN 2020

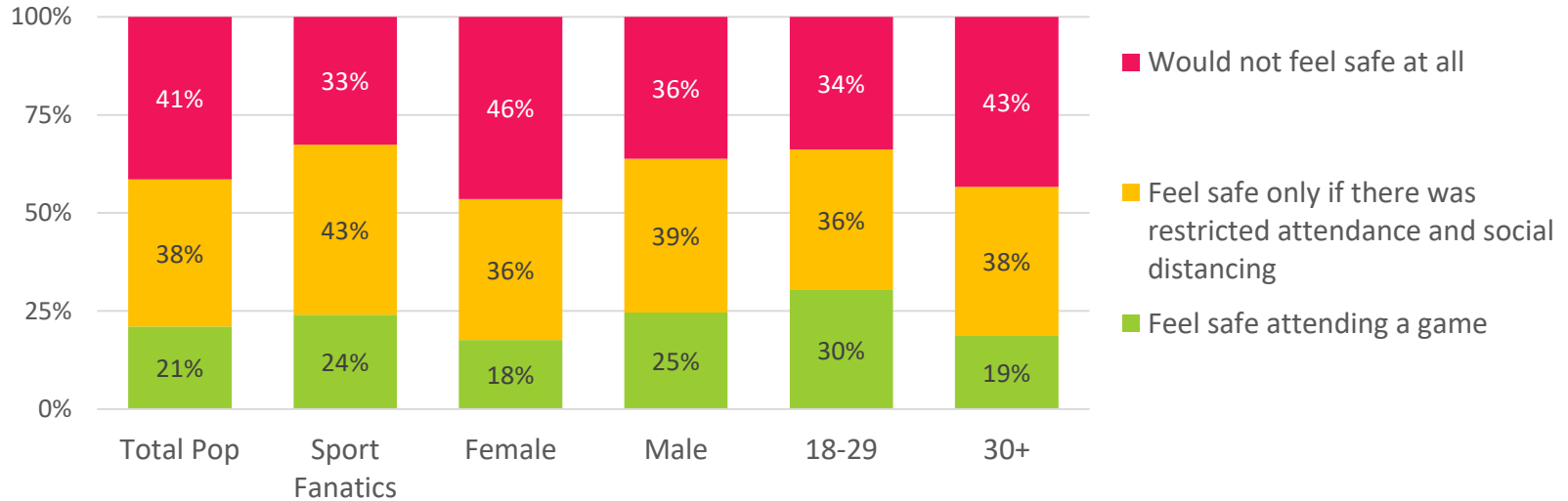
Current feelings around live sports returning in 2020



Q. For the remainder of 2020, do you think sports should eventually be ... ?

BUT MANY PEOPLE WON'T FEEL SAFE ATTENDING GAMES UNTIL A VACCINE IS AVAILABLE

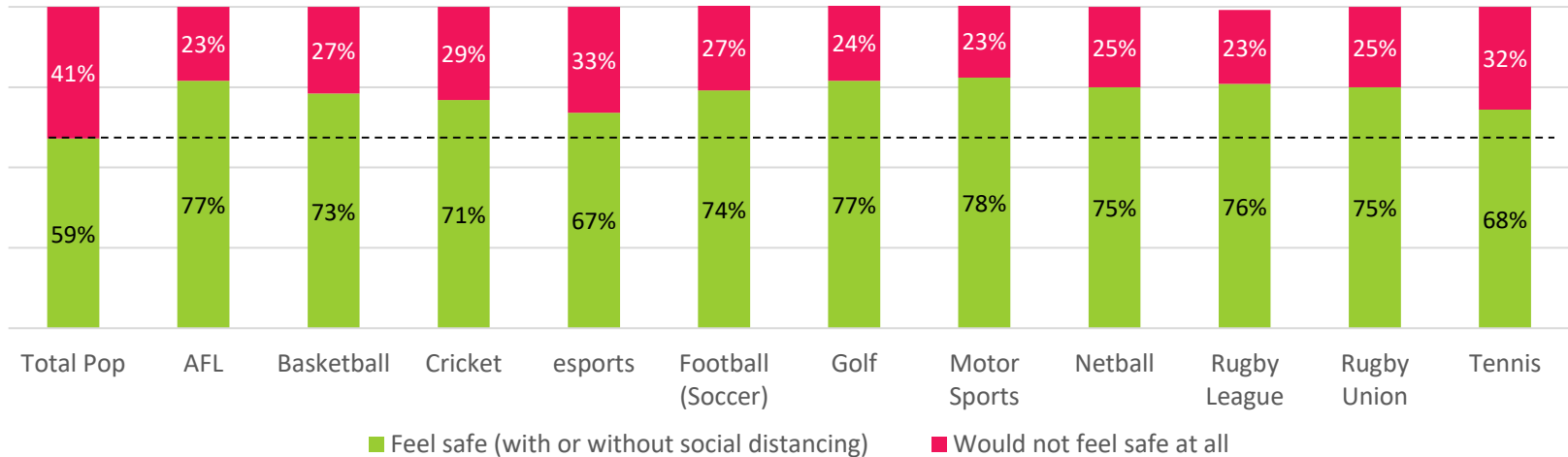
Current feelings around returning to live sports events prior to a Coronavirus vaccine being available



Q. If sports were to resume play later this year but before a vaccine for coronavirus is developed would you ... ?

SPORTS FANATICS ARE MORE LIKELY TO FEEL SAFE RETURNING TO SPORTS EVENTS WITHOUT A VACCINE

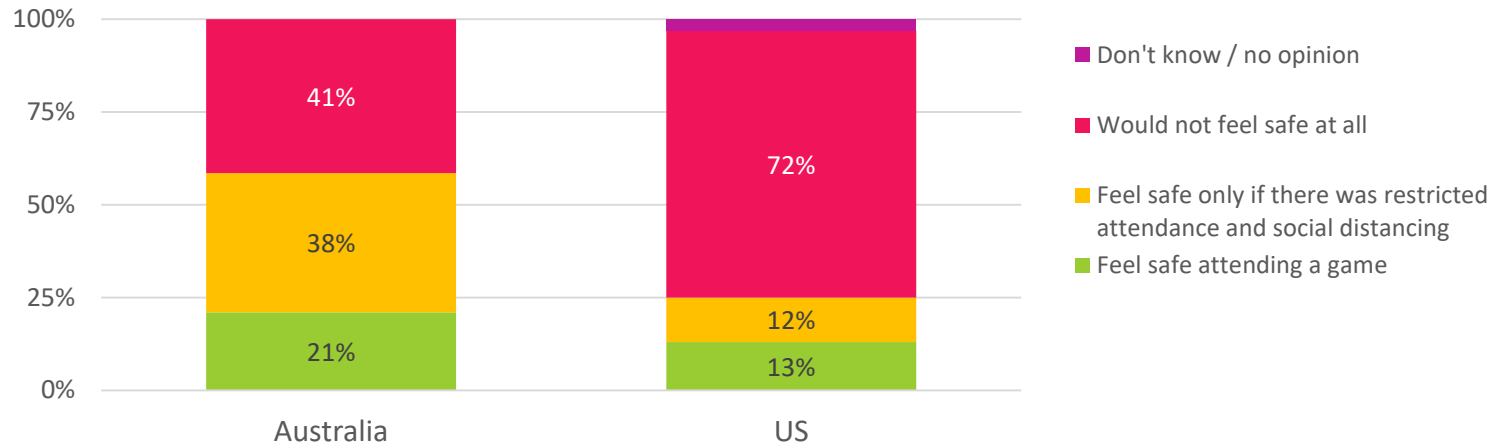
Current feelings around returning to live sports events prior to a Coronavirus vaccine being available – by fanatics of various sports and general population



Q. If sports were to resume play later this year but before a vaccine for coronavirus is developed would you ... ?

AUSTRALIANS SEEM TO BE LESS CONCERNED ABOUT RETURNING TO LIVE SPORTS EVENTS THAN AMERICANS

Current feelings around returning to live sports events prior to a coronavirus vaccine being available – Australia vs US



Gemba survey of n=300 Australians conducted over 16-17 April 2020; US results published by Seton Hall Sports Poll and reported by ESPN.com, 6-8 April 2020, n=762
Q. If sports were to resume play later this year but before a vaccine for coronavirus is developed would you ... ?

- Gemba conducted this poll of Australians on 16-17 April 2020
- Nationally representative sample n=300

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