

Gemba

NEW ZEALAND COVID-19 INSIGHTS

NZ SPORTS & ENTERTAINMENT CONSUMER
SENTIMENT DURING THE COVID-19 SHUT-DOWN

28 APRIL 2020

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INSIGHTS

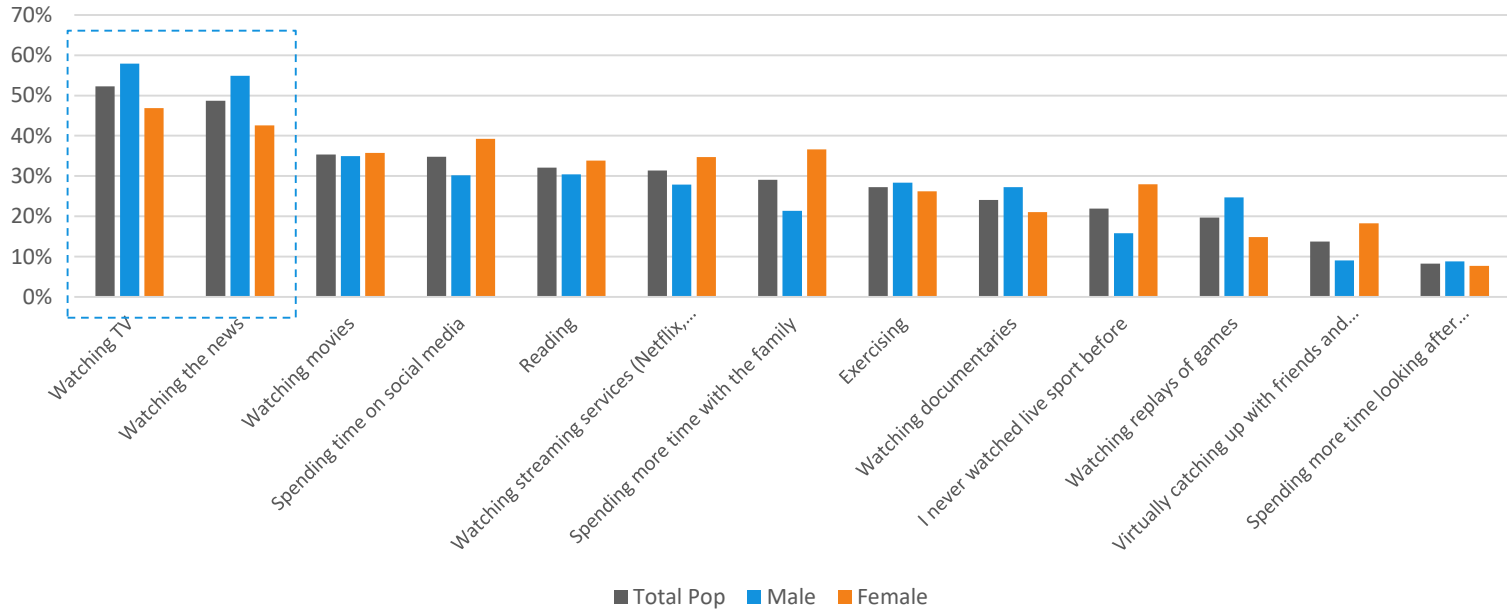


QUICK FIRE: COVID-19 SPORT & ENTERTAINMENT INSIGHTS 30 March, 2020

1. New Zealanders are filling the gap created by no live sport by watching TV and keeping up with the news, with under 30's in particular spending more time on social media and streaming services.
2. Sports fanatics tuned in to the first games of the Super Rugby and NRL seasons, and seemed to enjoy the broadcast despite the lack of any crowds in the stadium.

IN THE ABSENCE OF LIVE SPORT TO WATCH, NEW ZEALANDERS ARE GLUED TO THE BOX AND NEWS

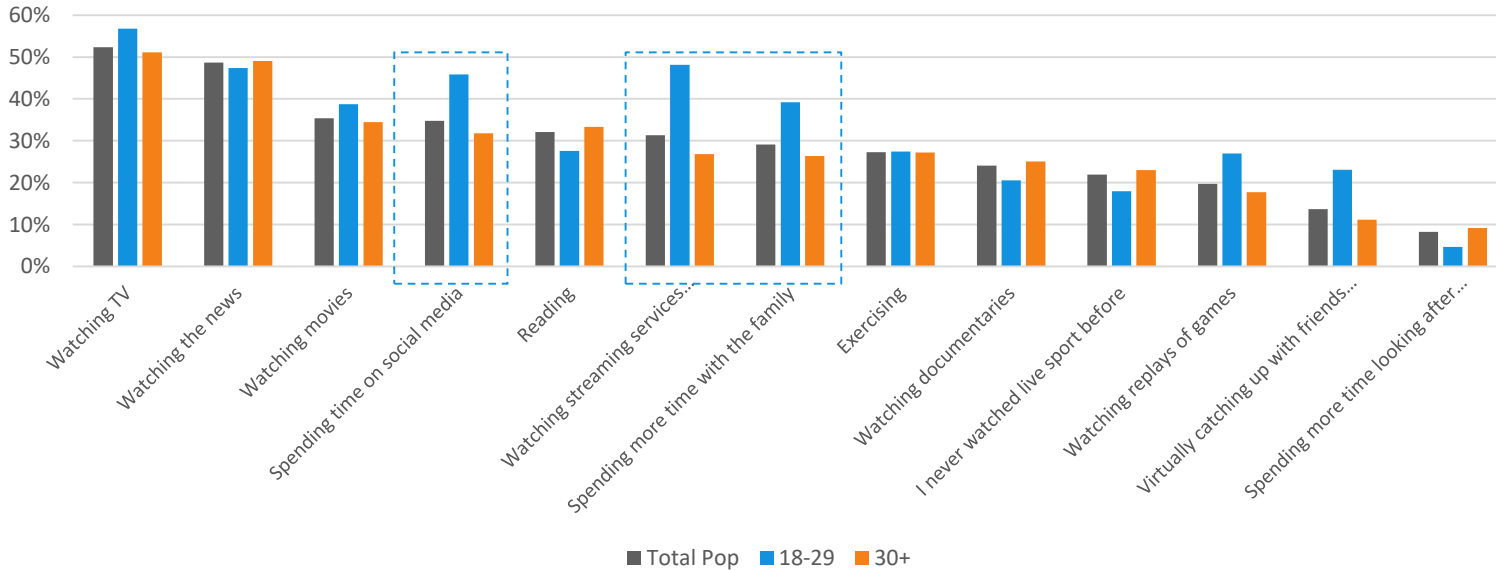
Activities instead of watching live sports during COVID-19 shutdown



March 2020 Q. How are you currently spending the time you used to watch live sports?

UNDER 30'S ARE USING THE TIME TO WATCH STREAMING SERVICES, ON SOCIAL MEDIA AND WITH FAMILY

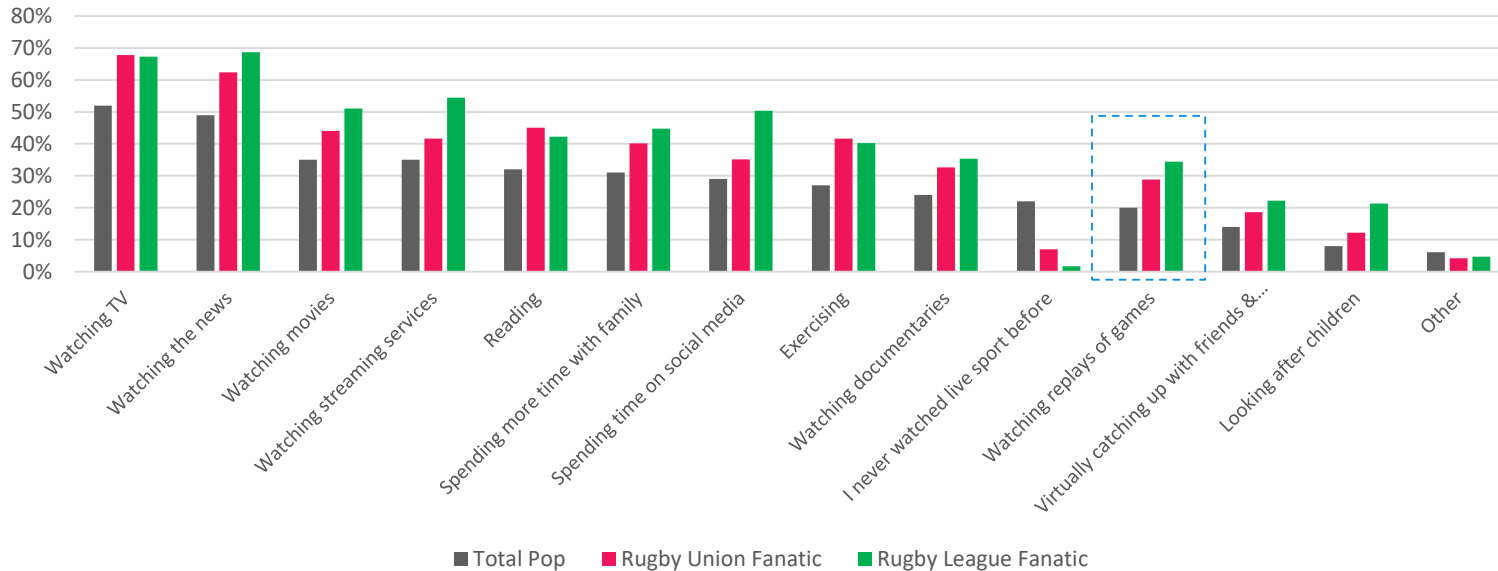
Activities instead of watching live sports during COVID-19 shutdown
(age segments)



March 2020 Q. How are you currently spending the time you used to watch live sports?

UNION AND LEAGUE FANATICS ARE HUNGRY FOR CONTENT – TURNING TO NEWS, MOVIES AND STREAMING SERVICES

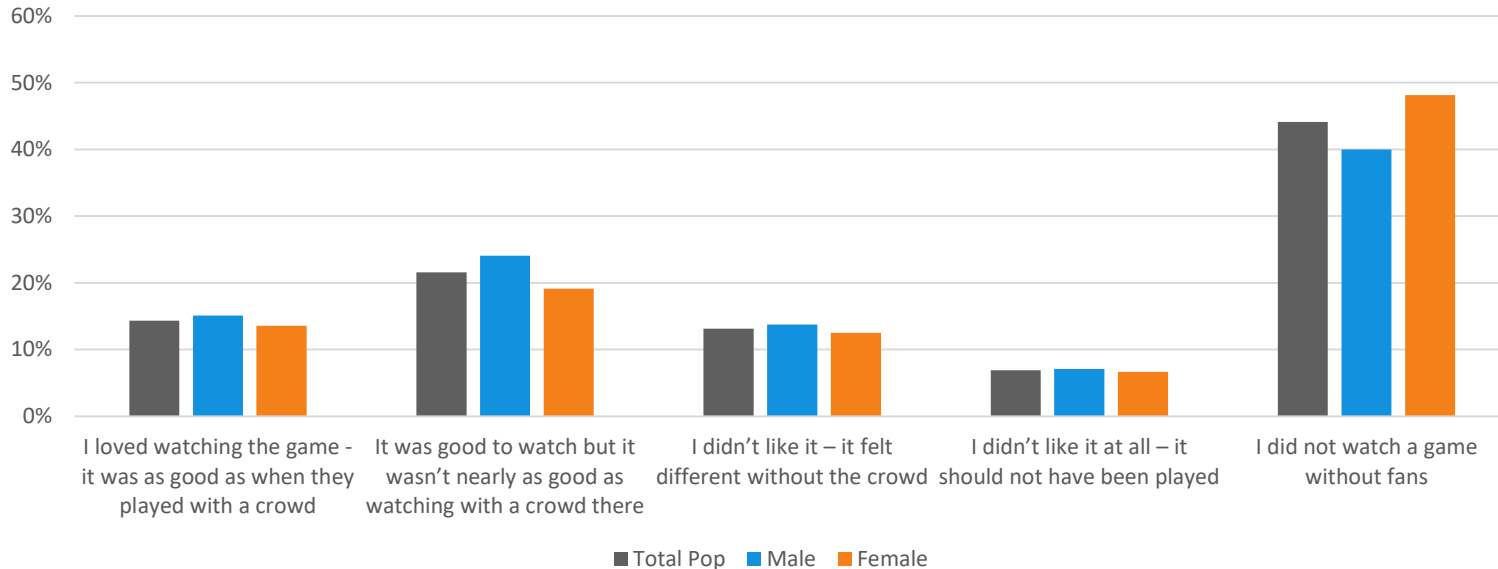
Activities instead of watching live sports during COVID-19 shutdown
(Union and League fanatics)



March 2020 Q. How are you currently spending the time you used to watch live sports?

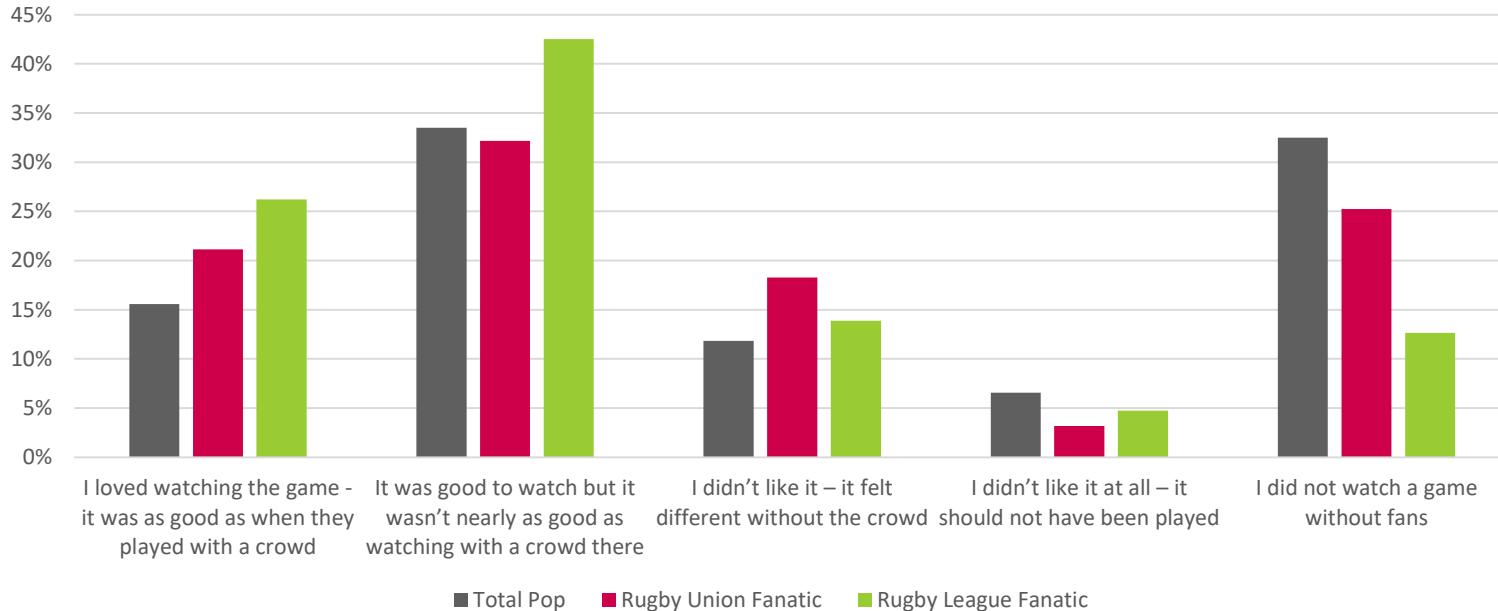
THE SKEW OF OPINION WAS IT WAS BETTER TO WATCH A LIVE GAME, EVEN WITH NO CROWD

Perceptions of broadcasted games with no crowds in attendance – by gender
(Super Rugby, NRL, NBL, A-League)



MOST UNION AND LEAGUE FANATICS TUNED IN AND ENJOYED THE BROADCAST, DESPITE THE EMPTY STADIUMS

Perceptions of broadcasted games with no crowds in attendance – by sport



March 2020 Q. If you watched an Super Rugby, NRL, NBL or A-League games when they played without fans in attendance, which of the following statements best represents your opinion of watching those games?

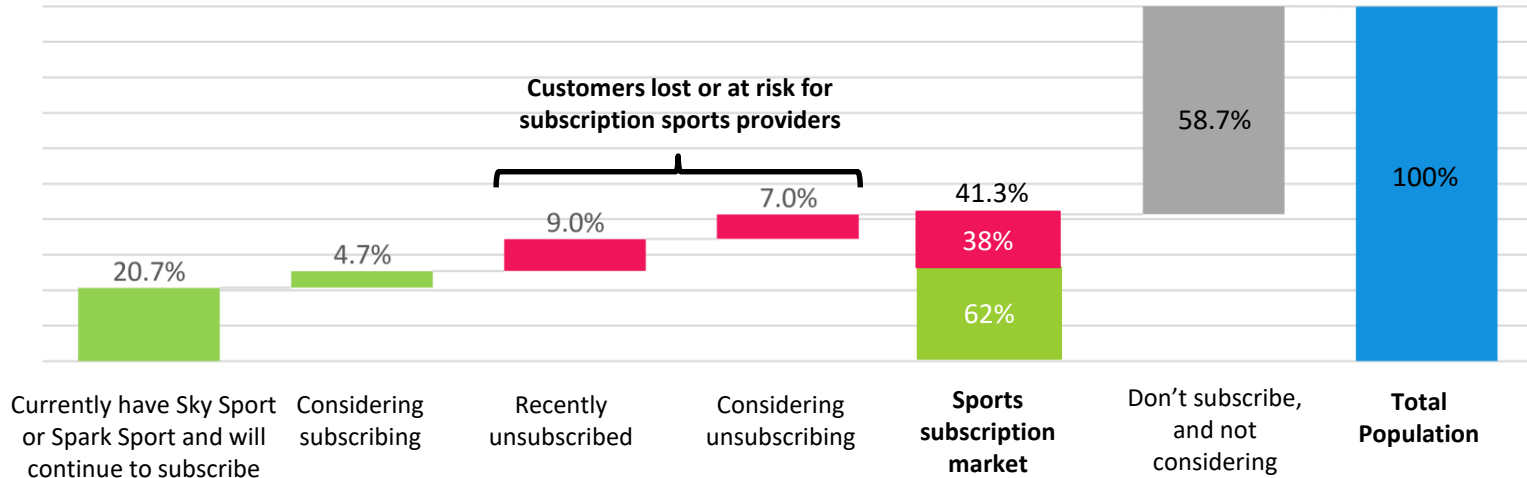
QUICK FIRE: COVID-19 SPORT & ENTERTAINMENT INSIGHTS

April 2020

1. Significant risk for subscription sports services (Sky Sports and Spark Sports), with just under 40% of the sport subscription market recently unsubscribed or considering unsubscribing. This is reflected in declines in Google search interest for Sky Sports following the suspension of the season
2. Looking ahead to when the crisis is over, currently many New Zealanders think they will spend more time with family than they used to, but less time attending live sport and music, or going to the cinema. Even 35% of Sports Fanatics consider they are less likely to attend a live sporting event

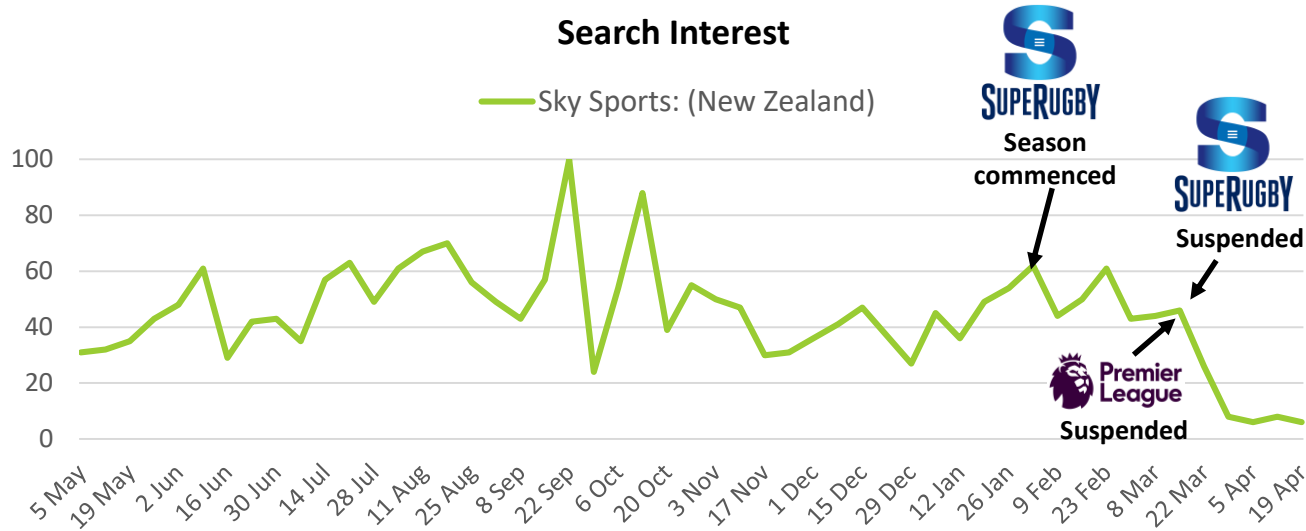
38% OF THE SKY SPORT OR SPARK SPORT SUBSCRIBER MARKET MAY BE AT RISK

Current considerations around subscription sports packages



April 2020 Q. Thinking about how people watch sport, which of the following statements best reflects your current situation?

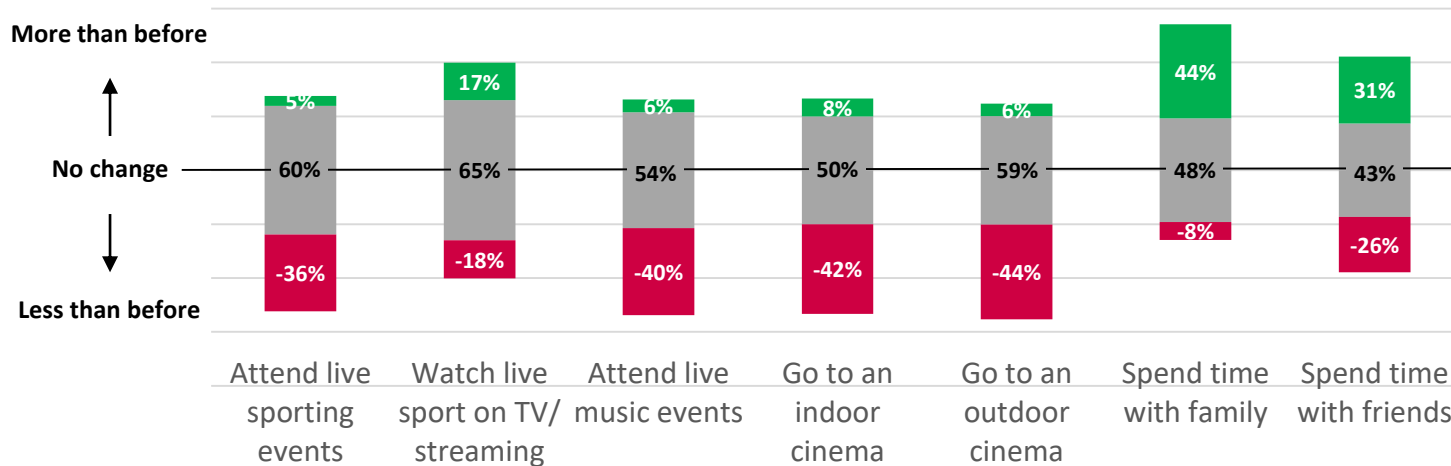
SEARCH TRENDS INDICATE A SUDDEN SLOW-DOWN IN INTEREST FOR SPORTS PLATFORMS



Source: Google Trends New Zealand

NEW ZEALANDERS PREDICT THEY WILL SPEND MORE TIME WITH FAMILY POST-LOCKDOWN, BUT POTENTIALLY LESS ATTENDING EVENTS AND CINEMA

Claimed forecast behaviour when social life can resume as before



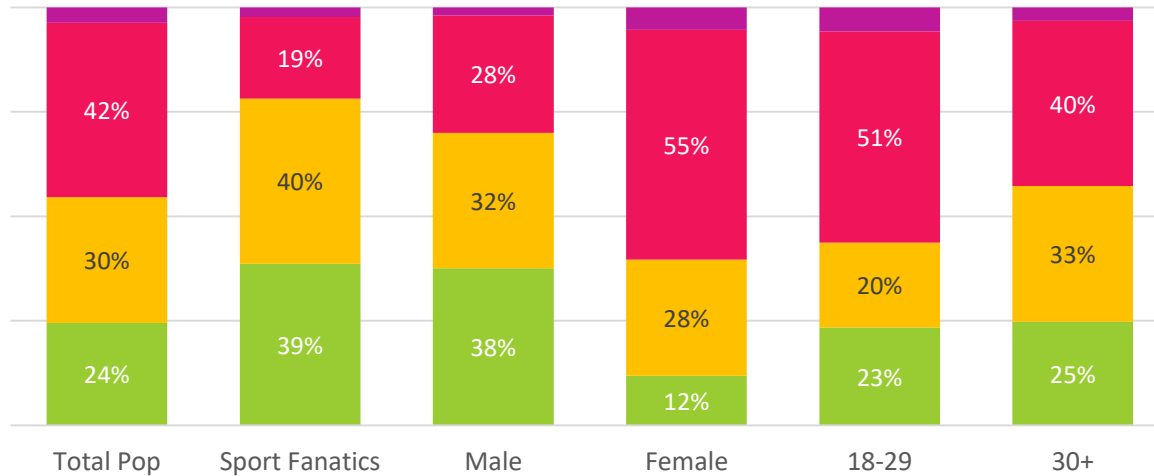
April 2020 Q. Thinking about when the current COVID-19 crisis ends – and social life can resume as before – for each of the following activities would you expect to do less than you did before, the same as before, or more than before?

QUICK FIRE: COVID-19 WHAT FANS ARE THINKING ABOUT RETURNING TO GAMES?

1. We are a long way from a return to normal. 29% of sports fanatics (and 36% of the New Zealand population) say they **would not feel safe** attending a game before a vaccine for COVID-19 was developed
2. While most New Zealanders say they are missing live sport to some degree, worryingly 19% of sports fanatics say they are **not missing it at all**. Will they return as fans when sport restarts?
3. Half of New Zealanders think live sport should return either with fans or at least fans with restrictions on attendance and practising social distancing.

OVER HALF OF NEW ZEALANDERS ARE MISSING LIVE SPORT DURING THE SHUTDOWN

How much are you missing live sport?



Worryingly, 19% of Sports Fanatics say they are not missing the opportunity to watch live sports

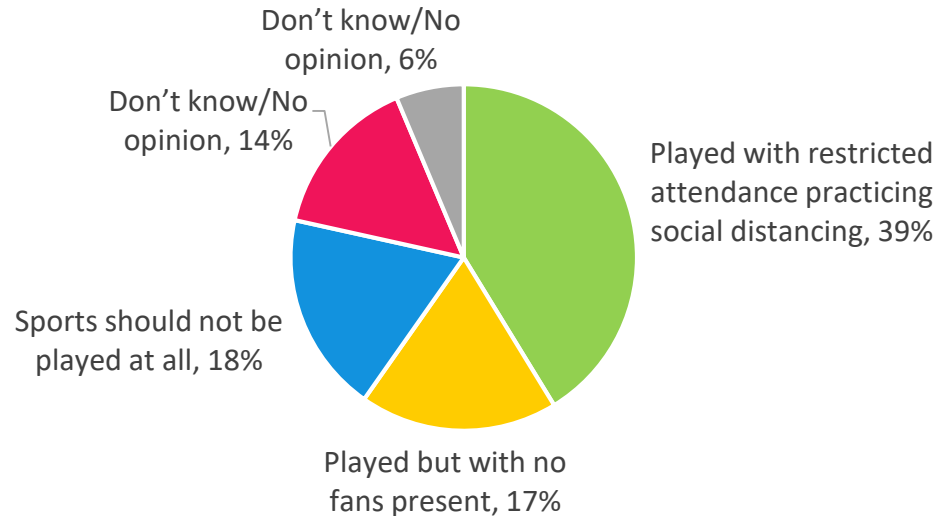
- Don't know/No opinion
- Not at all
- Some
- Very much

April 2020 Q. How much would you say you miss having the opportunity to watch live sports?

THERE IS A BALANCE OF OPINION THAT SPORT SHOULD BE PLAYED, BUT WITH EITHER SOCIAL DISTANCING OR NO FANS

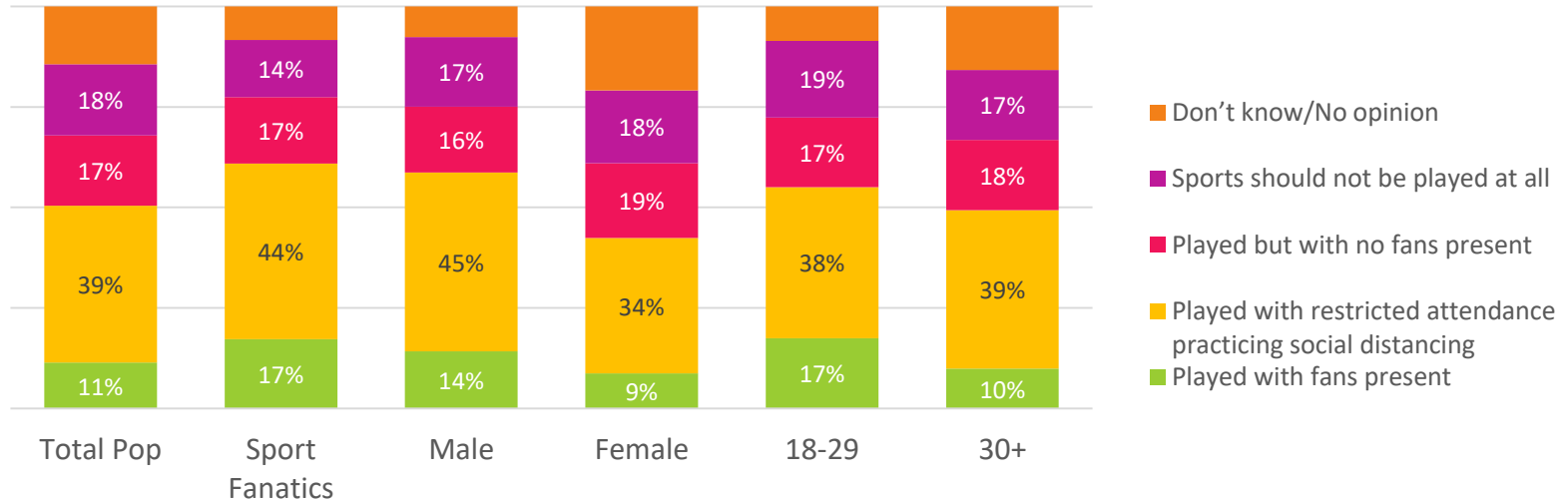
New Zealander's feelings towards live sport returning in 2020

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



MALES, YOUNGER AUDIENCE AND SPORTS FANATICS ARE SLIGHTLY MORE BULLISH ABOUT SPORT BEING PLAYED IN 2020

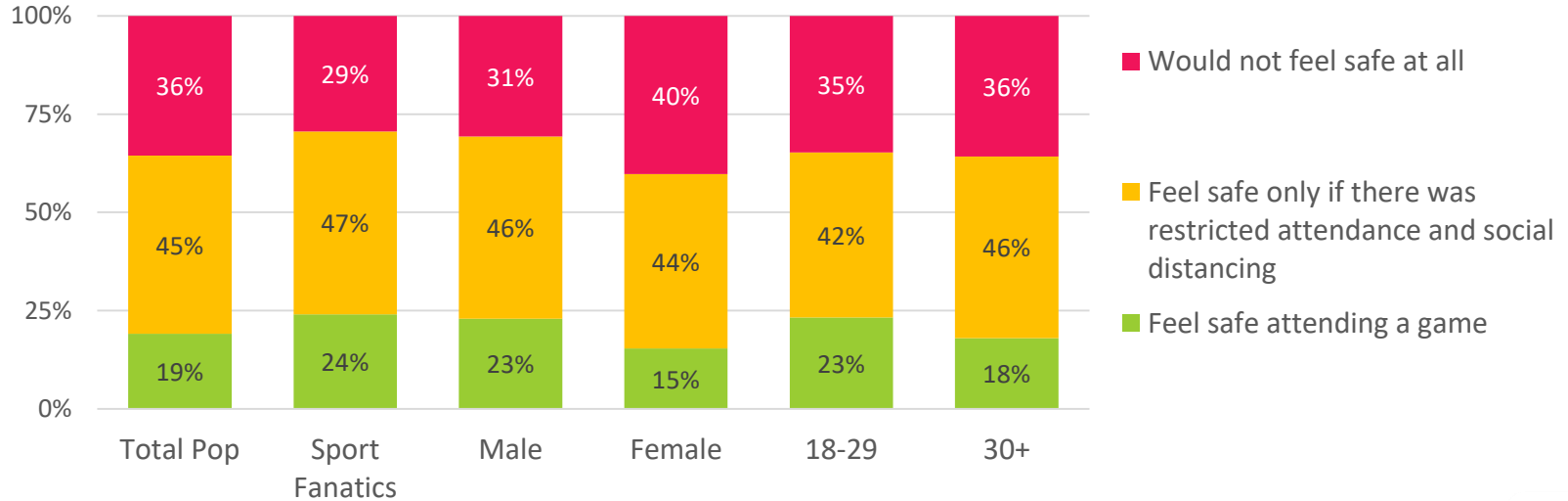
Current feelings around live sports returning in 2020



April 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

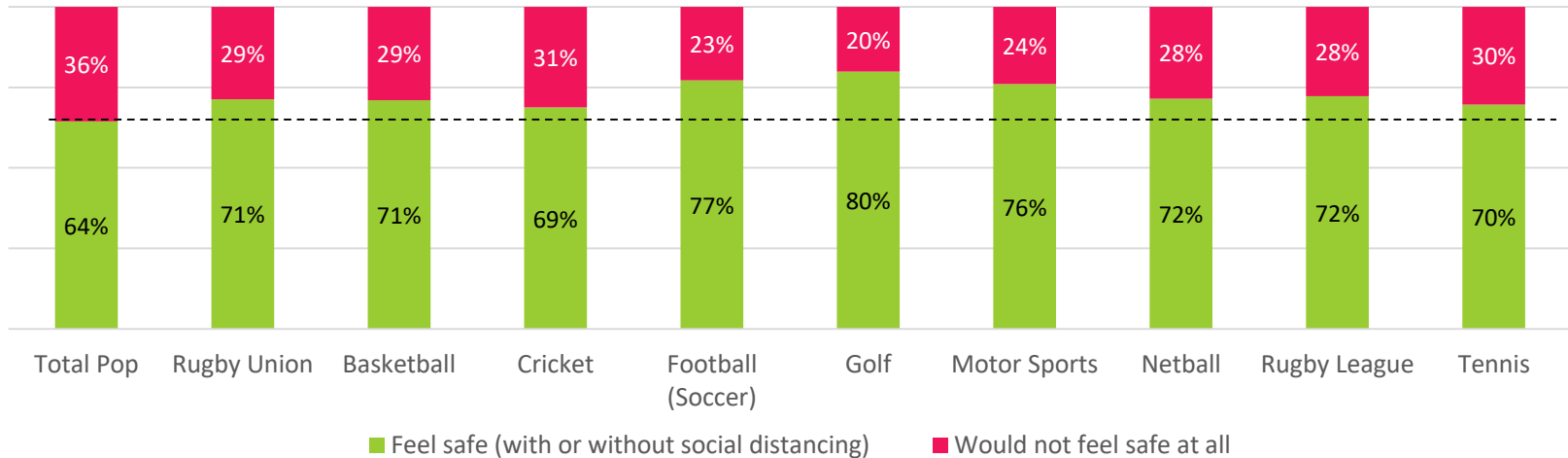


At best some measure of social distancing or restricted attendance would have to be in place

April 2020 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

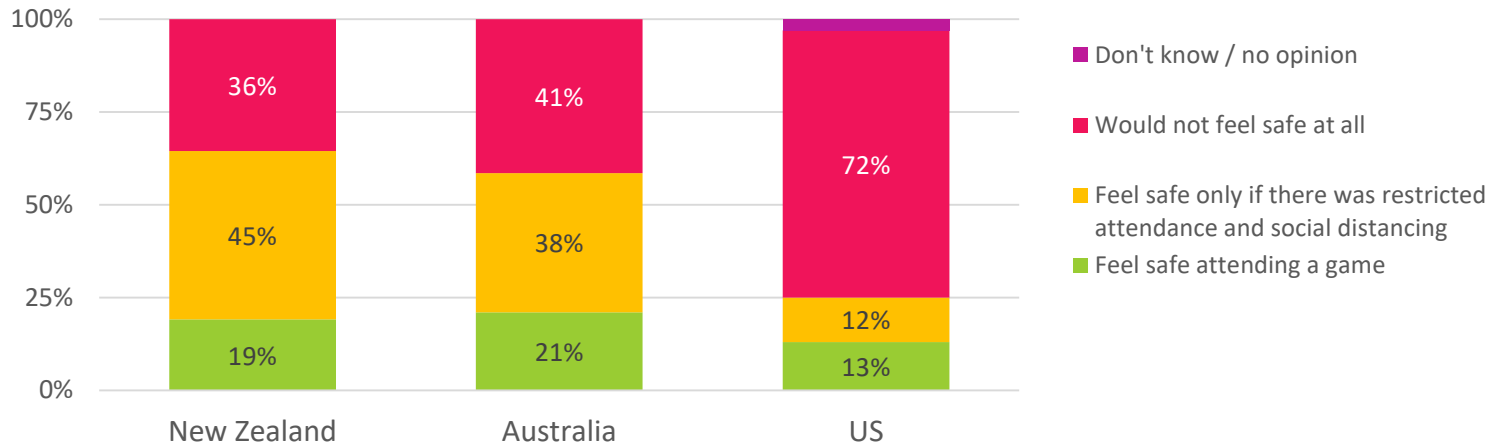
Current feelings around returning to live sports events prior to a Coronavirus vaccine being available – by fanatics of various sports and general population



April 2020 Q. If sports were to resume play later this year but before a vaccine for coronavirus is developed would you ... ?

NZ AND AUS ARE APPEAR 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 – New Zealand vs Australia vs US



Gemba survey of n=300 Australians and New Zealanders 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 ... ?

- All polls undertaken by Gemba throughout March and April 2020
- Each poll achieves a nationally representative sample of n=300

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