

Gemba

COVID-19 SPORTS & ENTERTAINMENT RESEARCH CLUB MEMBERSHIP AND DIGITAL FAN ENGAGEMENT CONSIDERATIONS

9 APRIL 2020

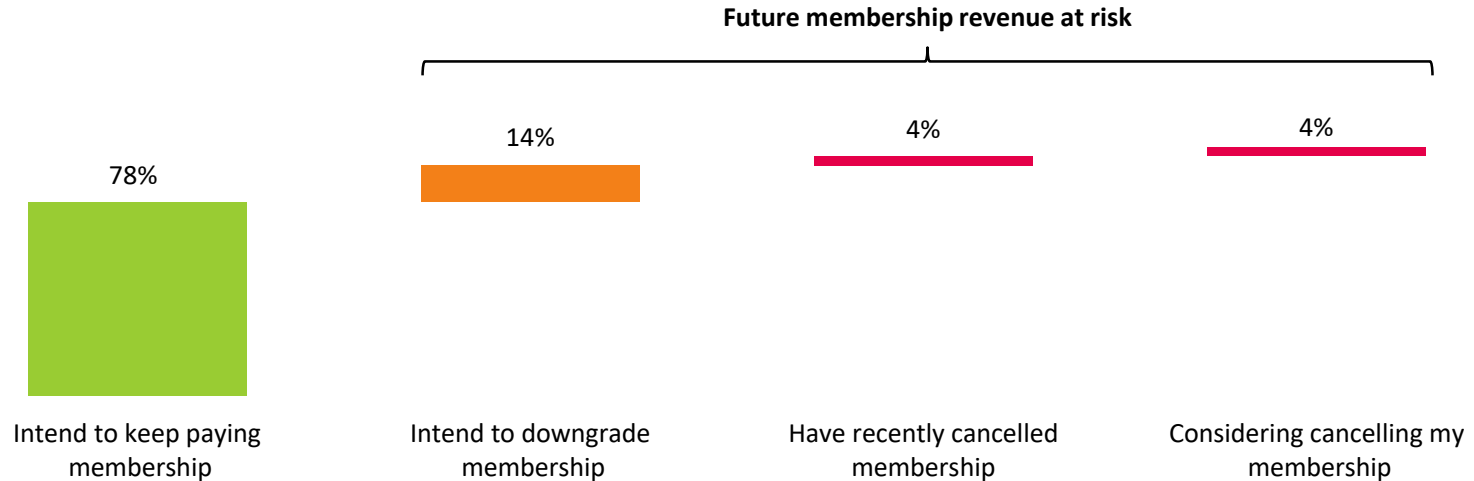


QUICK 3: COVID-19 MEMBERSHIP INSIGHTS

Membership represents a large proportion of league and club revenue. Understanding current and future sentiments will be key to safe-guarding revenue

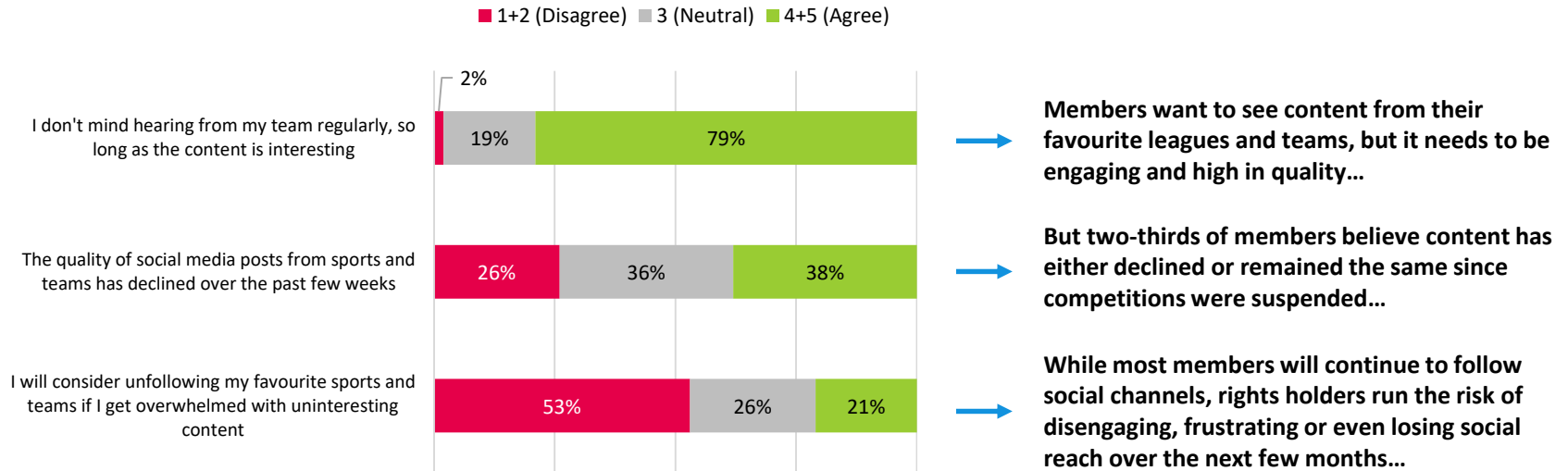
1. The majority of revenue generated from membership is unlikely to be impacted long-term, with 92% of members claiming they intend to keep paying membership fees (either at current or downgraded rates)
2. But with 14% of current members claiming they will consider downgrading, and 8% having already cancelled or considering cancelling, leagues and clubs may need to evolve membership inclusions to meet changing consumer needs
3. While consumers are feasting on digital content, leagues and clubs need to produce quality content to avoid disengaging and even frustrating members. Even in quarantine, quality trumps quantity

IN SOME GOOD NEWS FOR SPORT, 92% OF MEMBERS INTEND TO KEEP PAYING FEES. HOWEVER, WITH FUTURE ATTENDANCE LIKELY TO BE IMPACTED, MEMBER INCLUSIONS MAY NEED TO EVOLVE TO SAFE-GUARD REVENUES



Data shown is for survey respondents that said they are a current member of a professional sporting club
Q. Which of the following best describes your affiliation to professional sporting clubs?

SKY ROCKETING DIGITAL CONSUMPTION PRESENTS A GREAT OPPORTUNITY FOR RIGHTS HOLDERS TO ENGAGE FANS, BUT IT COULD HAVE AN INVERSE EFFECT IF THE QUALITY OF CONTENT DETERIORATES



Responses are from those current members that say they intend to keep paying
Q. Please indicate how much you agree with each using the following scale, where 1 is you completely disagree up to 5 you completely

- Gemba conducted this poll of Australians over the weekend 3-5 April 2020
- Nationally representative sample n=305

Visit www.thegembagroup.com/insights

Gemba
SPORT. ENTERTAINMENT.