

Gemba

**COVID-19 Sport &
Entertainment
Insights**

12 MAY 2020



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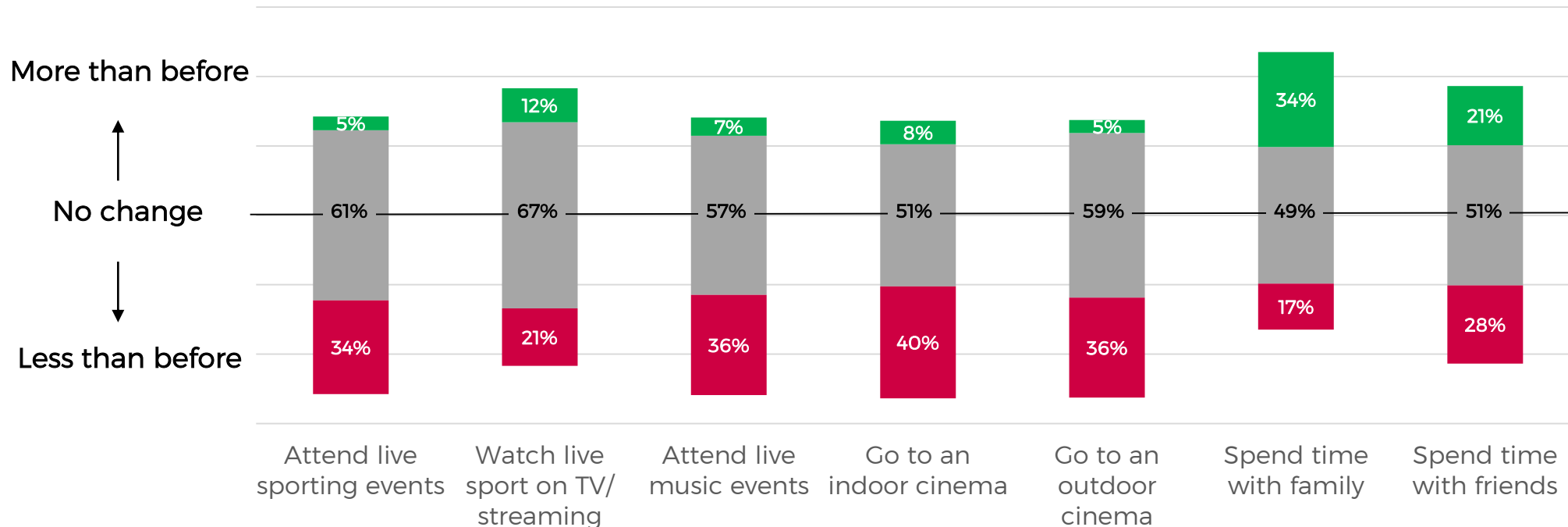
GEMBA'S LATEST CONSUMER RESEARCH INTO SPORTS FANS DURING THE CORONAVIRUS LOCKDOWN SHOWS THAT THERE HAS BEEN LITTLE CHANGE IN WHAT PEOPLE EXPECT TO DO MORE OR LESS OF WHEN THE CRISIS IS OVER. MORE THAN A THIRD EXPECT TO ATTEND FEWER LIVE EVENTS, AND 40% SAY THEY'LL GO TO THE CINEMA LESS.

AND MORE THAN HALF OF THOSE WHO HAVE RECENTLY CANCELLED THEIR SPORTS STREAMING SUBSCRIPTION SERVICE INTEND TO RESUBSCRIBE WHEN SPORTS RESUME.

Australians predict they will spend more time with family post-lockdown, but potentially less attending events and cinema

RESULTS LARGELY UNCHANGED SINCE THE START OF APRIL 2020

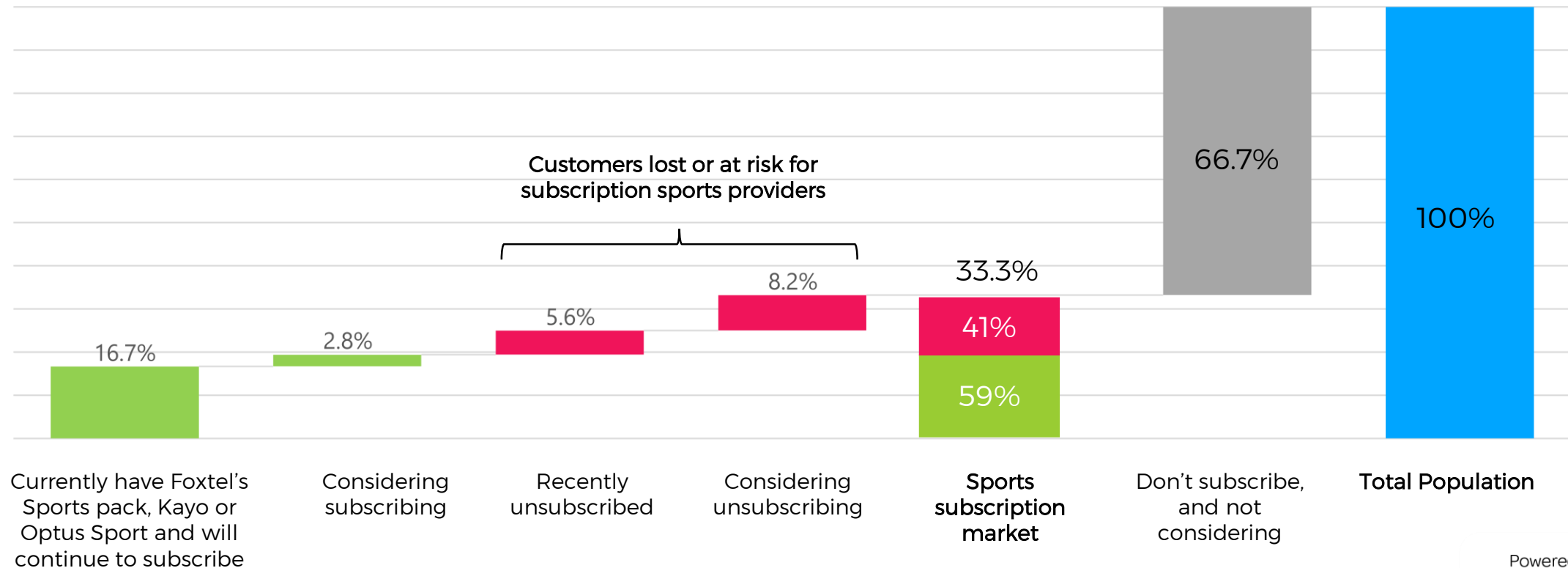
Claimed forecast behaviour when social life can resume as before



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?

In early April we predicted that 41% of Foxtel Sports, Kayo and Optus sport subscriber market may be at risk

CONSIDERATIONS AROUND SUBSCRIPTION SPORTS PACKAGES (GEMBA RESEARCH 7 APRIL 2020)



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Source: Gemba research published 7 April 2020 http://thegembagroup.com/wp-content/uploads/2020/04/GEMBA_COVID-19_3-quick-sport-ent-insights_v2_070420.pdf
Q. Thinking about how people watch sport, which of the following statements best reflects your current situation?

More than half of those who have recently unsubscribed from a sports streaming service are likely to resubscribe when sport starts again

A TEMPORARY TIME-OUT?

On 8 May 2020, News Corp announced that its Kayo sports streaming service had lost 136,000 paying subscribers, or 33% of its customers, in a month since the AFL, NRL, A-League and Super Rugby seasons were suspended.



Gemba's research suggests that 58% of these lost subscribers are likely to come back as soon as sport resumes

Thinking about when live sport can be played again in Australia, how likely are you to subscribe to Foxtel's sports pack, Kayo or Optus Sport?

(of those that say they have recently unsubscribed from one or more of these services)

42% certain or almost certain

16% likely

Download our other COVID-19 research reports here
<http://thegembagroup.com/news/free-covid-19-sports-entertainment-insights/>

- Gemba conducted this poll of Australians over 7-8 May 2020
- Nationally representative sample n=306

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