



VAB - MARKETER'S GUIDE - 2020

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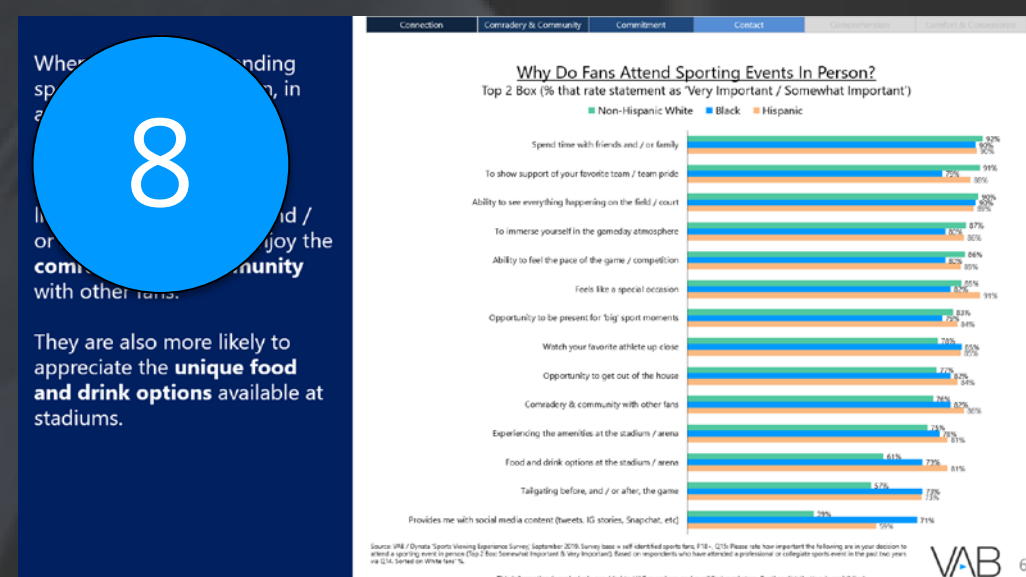
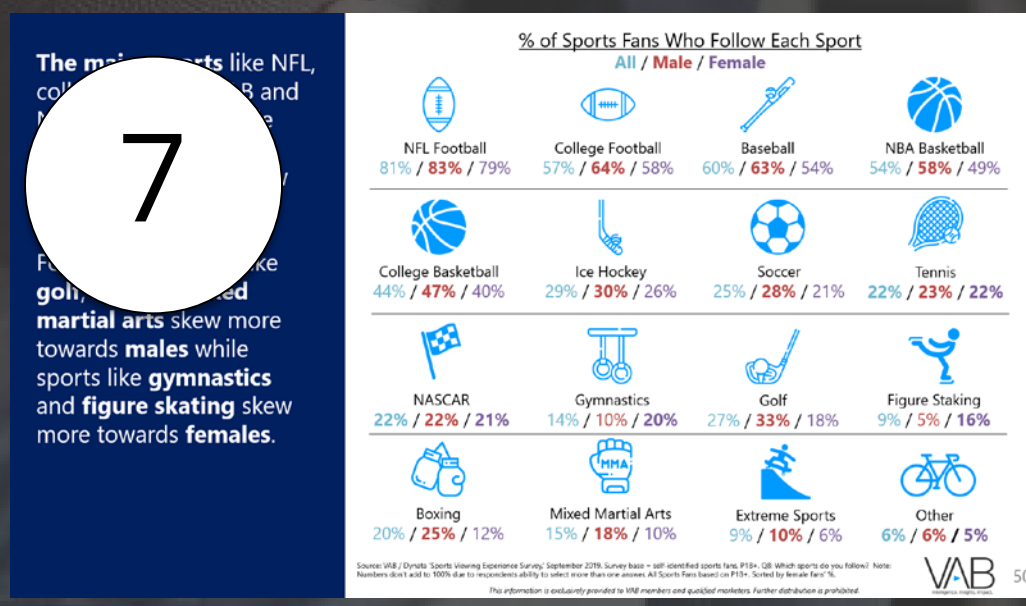
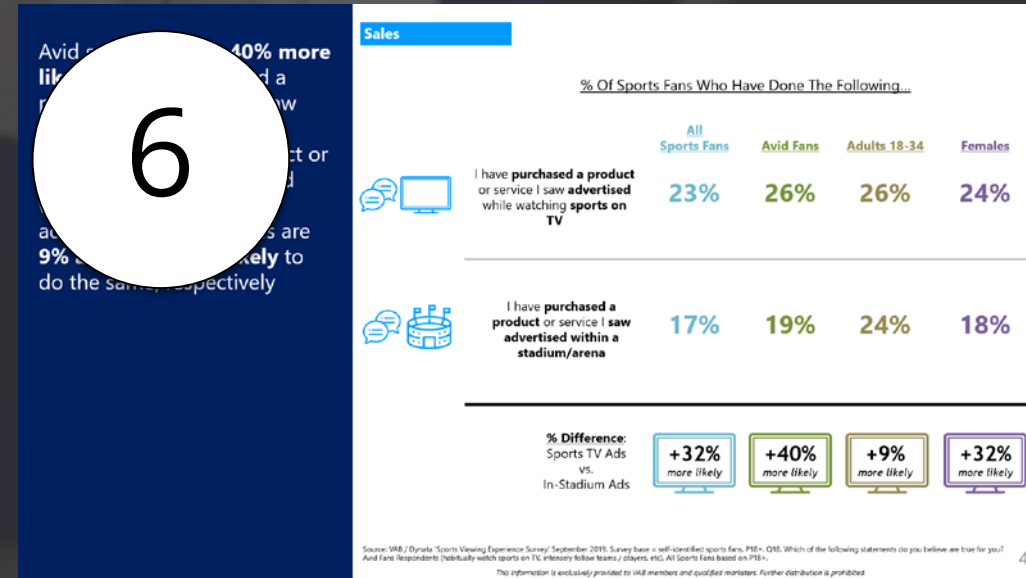
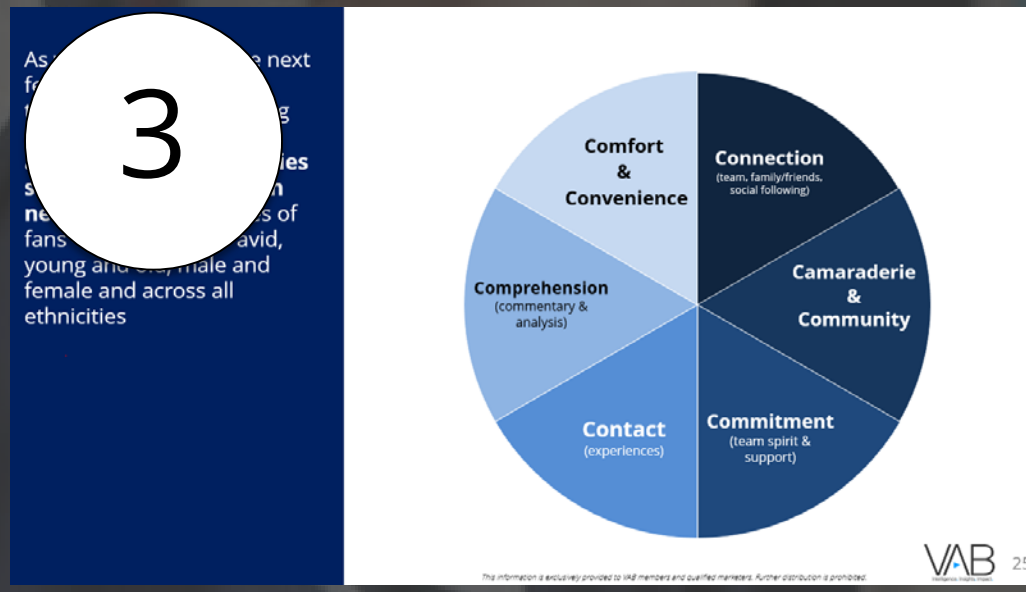
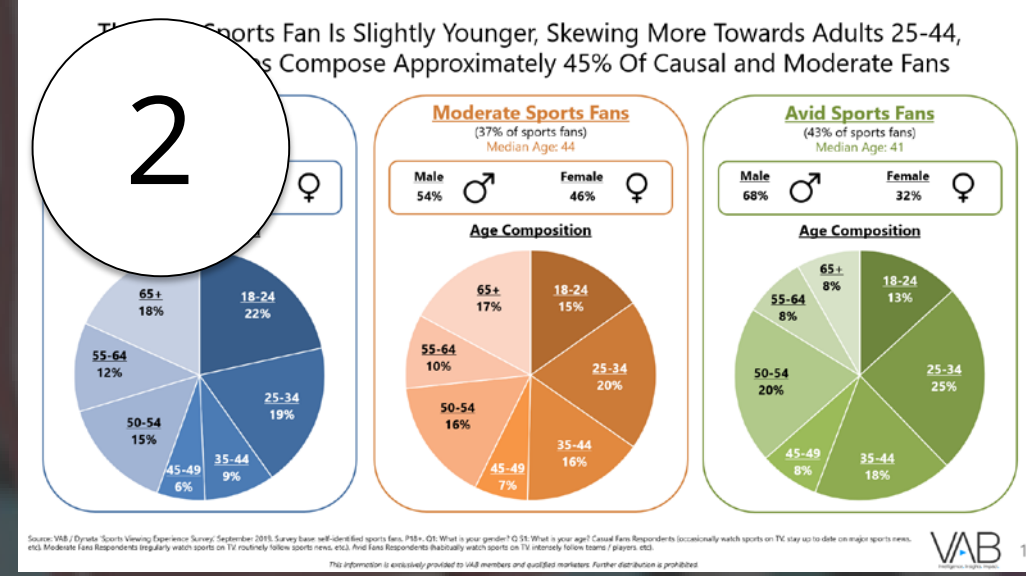
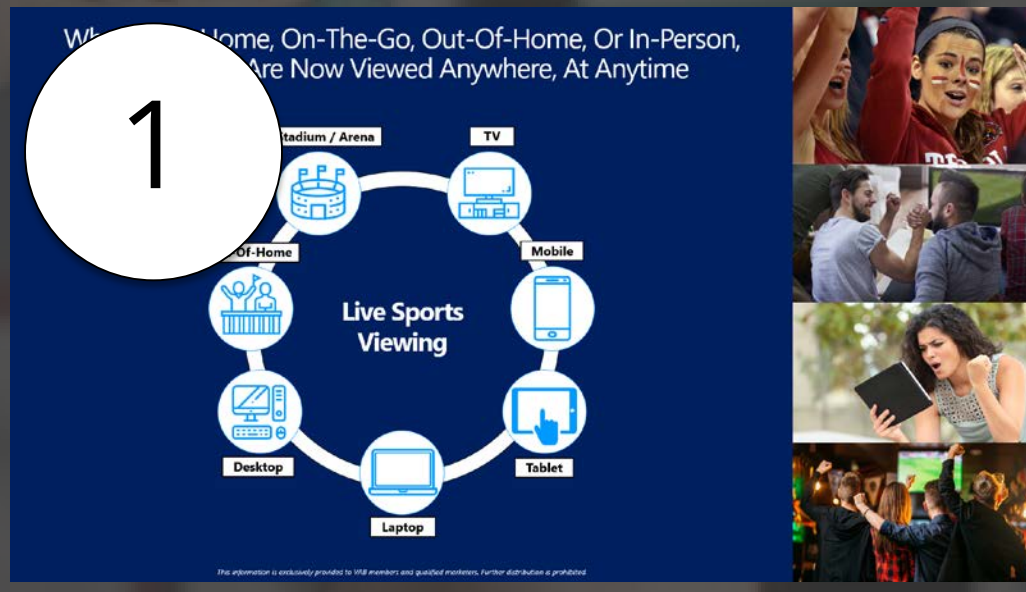
The Best Seats In The House

A Custom Study Exploring Sports Fans' Viewing Preferences

VAB Members

The Scouting Report

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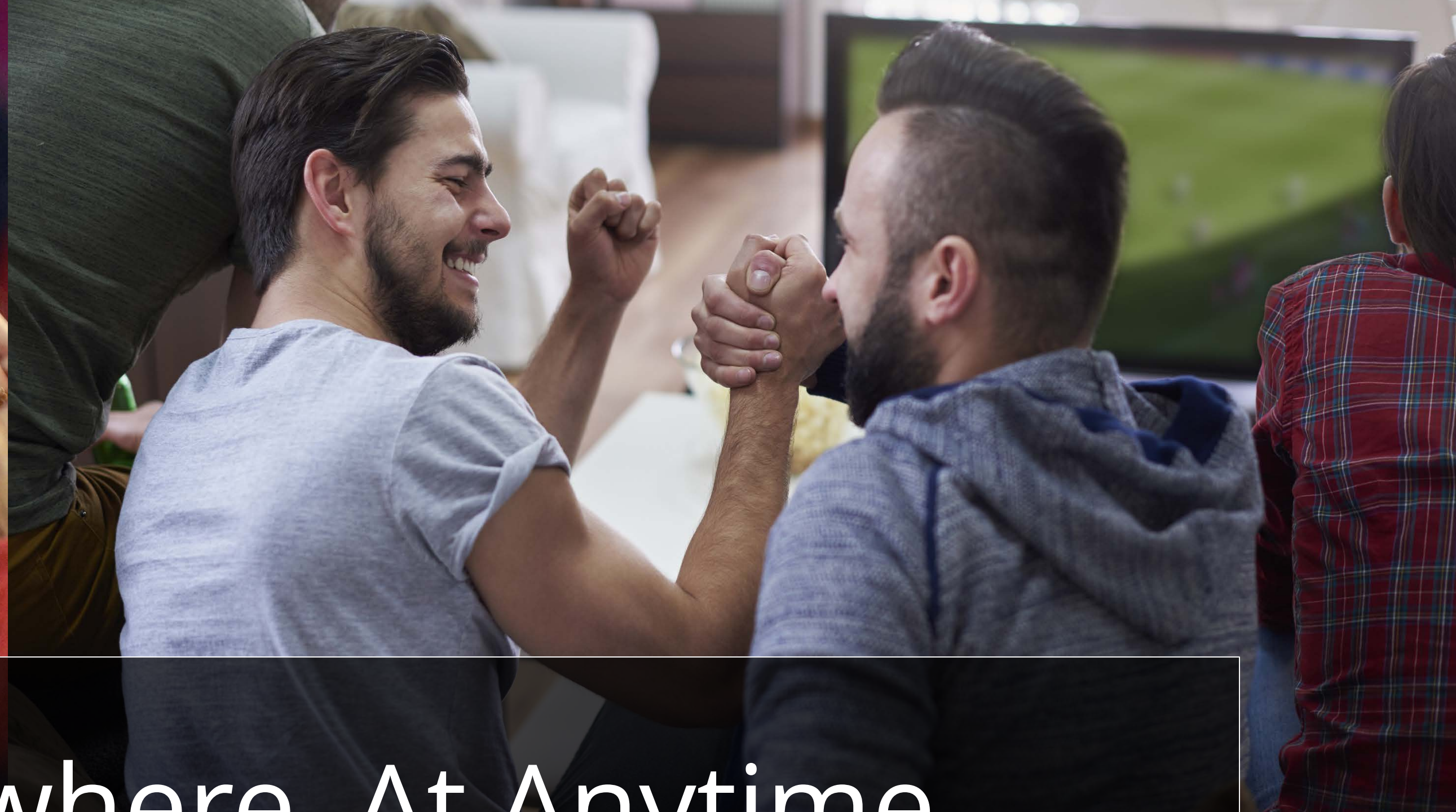
Identifying The Best Seats In The House In A World Of “Anywhere, Anytime” Viewing

In today’s complex video landscape, live sports are now viewed anywhere, at anytime; whether at home, on-the-go, out-of-home or in-person at a stadium or arena. Attending sporting events continues to be one of the most popular leisure activities throughout America even as the availability of live sports content explodes across a growing number of TV channels and streamed through a variety of websites and mobile apps.

To help marketers navigate this evolving landscape, VAB conducted a custom study in partnership with *Dynata* to understand the passion of today’s sports fans and the ‘why’s’ and motivating factors behind their viewing preferences, particularly between at-home viewing and in-person event attendance.

As we learned through the study, due to the unbridled passion involved, sports has the ability to satisfy several essential human needs for all types of fans – casual and avid, young and old, male and female, black and Hispanic – including **camaraderie & community, connection, commitment, contact, comfort & convenience** and **comprehension**.

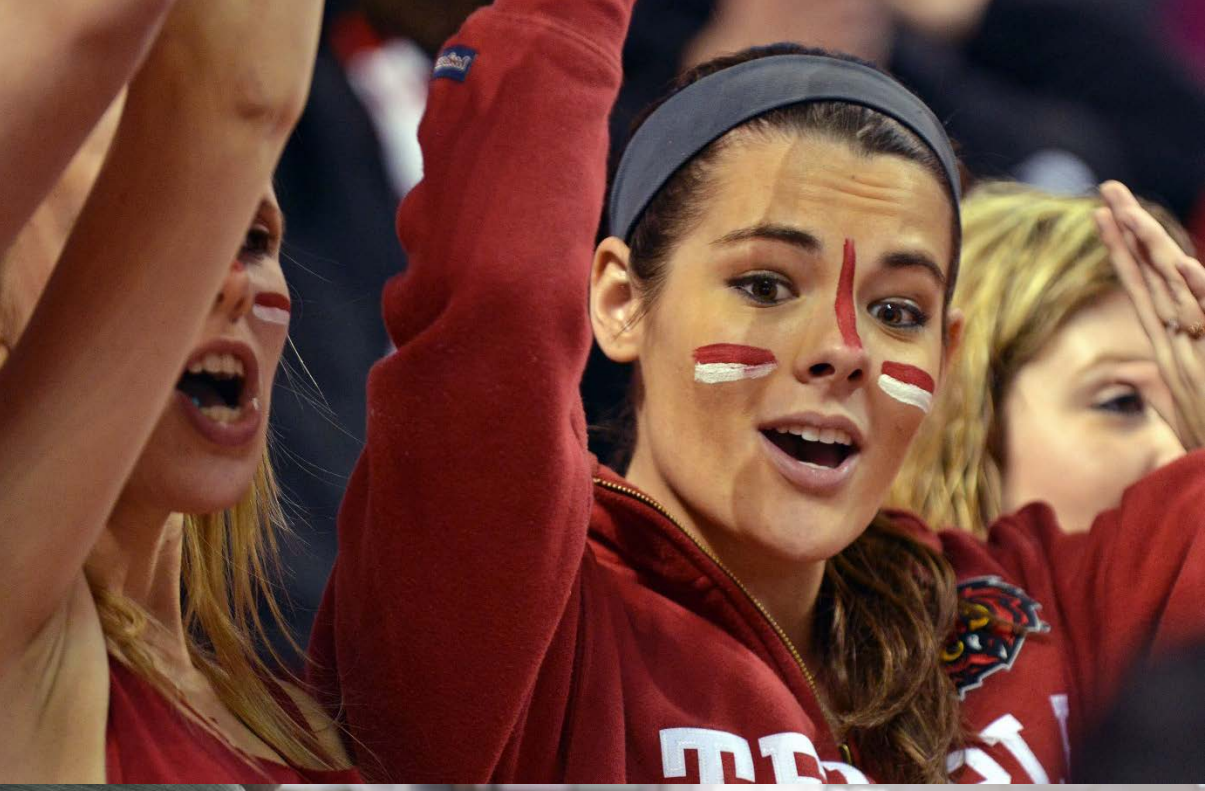
Over 70% of all sports fans prefer watching sports at home since it’s the location that can most often deliver on all six of these need-states. From an advertiser perspective, the comfort, convenience and ease of connection and connectivity during at-home viewing means that sports fans are more likely to engage with sports TV advertising and take consumer action than if they saw in-stadium ads.



Live Sports: Available Anywhere, At Anytime



Whether At Home, On-The-Go, Out-Of-Home, Or In-Person, Live Sports Are Now Viewed Anywhere, At Anytime

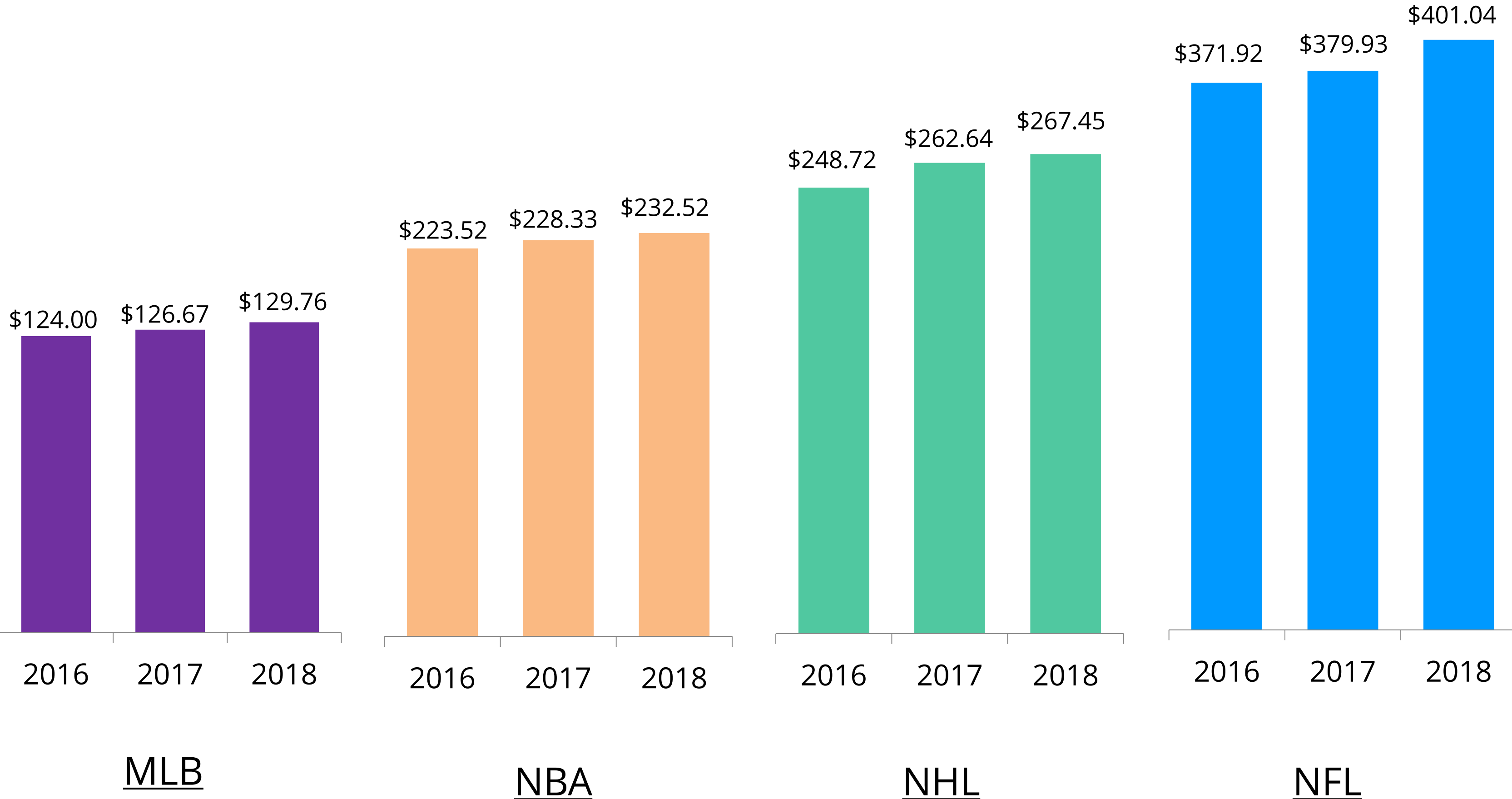


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With over 130 million tickets sold across the four major sports in 2018, attending live sporting events in person continues to be **one of the most popular leisure activities** throughout America.

However, the high cost to attend a game for a family of four continues to increase and the reflected costs don't account for concessions, souvenirs, parking and other ancillary purchases.

Average Ticket Price for a Family of Four To Attend ONE Major Sporting Event



Source: VAB Analysis of MPAA, 2016 Theatrical Market Statistics, 2017 and 2018 Theme Report

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Meanwhile, There's Been An Explosion Of Live Sports Content Available Across A Growing Number Of TV Channels And Streamed Through Websites And Mobile Apps

Ad-Supported TV Networks With Sports



Premium Sports TV Packages with Ads



Non-Ad Supported Sports TV Packages



Ad-Supported TV Apps With Sports



OTT Subscription Services With Sports



Live Social Stream With Sports



*Chart represents a robust sampling of available services as of 12/1/19.

And The In-Home Viewing Experience Is Only Getting Better With Increased Penetration Of 'Next Generation' TVs (Bigger, Clearer, Crisper And More Connected)

	<u>2014</u>	<u>2019</u>
HDTV	88%	91%
Smart TV	42%	64%
42"+ Screen*	33%	55%
4K (UHD) TV	1%	49%

Source: VAB analysis of S&P Global Intelligence, Kagan, 2019, U.S. analog, digital, HD, 3D, 4K Ultra HD and smart TV set and Blu-ray player projections and Smart TV set estimated penetration of total US TVHHs % are based of TV Households; *GFK MRI, 2019 Spring & 2014 Doublebase (% based on TV owners).

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With An Array of Options Within The Sports Landscape, We Conducted A Custom Study To Understand Fans' Preferences For Live Sports Viewing

As the sports viewing landscape evolves with enhancements to current platforms and growth of additional touchpoints to access content, we wanted to dig deeper to help marketers understand the passion of today's sports fan and the 'why's' and motivating factors behind their viewing preferences, particularly at-home viewing vs. in-person event attendance.

To do this, VAB commissioned *Dynata* to conduct the 'Sports Viewing Experience' Survey fielded online in September 2019. The results are based on 1,023 adult 18+ U.S. respondents who identified themselves as a sports fan (either casual, moderate or avid).

In addition to examining the different levels of fandom, we also analyzed several other demographic cuts for the sports fan including adults 18-34, adults 35+, males and females, and blacks and Hispanics.





Understanding Today's Sports Fans

A Snapshot Of Their Unbridled Passion Across Audience Segments

The Three Levels of Sports Fandom



Casual Sports Fan

(20% of sports fans)

Sports is one of many interests for the casual fan. They stay up-to-date with major sports news and stories so that they can be part of the conversation with friends and family when they get together to watch sports. Casual fans occasionally watch sports on TV with two-thirds watching a live sporting event at least on a weekly basis. They are more likely to prefer watching sports at a bar/restaurant or someone's home as part of a social gathering.



Moderate Sports Fan

(37% of sports fans)

The moderate fan enjoys watching sports and routinely follows sports news and stories so they can stay up-to-date with their favorite teams. They regularly watch sports on TV with three-quarters watching live sports at least a few times a week. Moderate fans are more likely to prefer watching sports, and following their favorite teams, from the comfort of their own home but they will also attend a game in-person occasionally.



Avid Sports Fan


(43% of sports fans)


Sports are a core passion of the avid fan. They intensely follow their favorite leagues, teams and players by continually checking news and updates through their mobile sports apps. They are habitual TV viewers - 51% watch live sports on a daily basis. Avid fans also love the gameday atmosphere and enjoy rooting on their favorite team in person - 83% have attended a game/event over the last two years.

The Avid Sports Fan Is Slightly Younger, Skewing More Towards Adults 25-44, While Females Compose Approximately 45% Of Casual and Moderate Fans

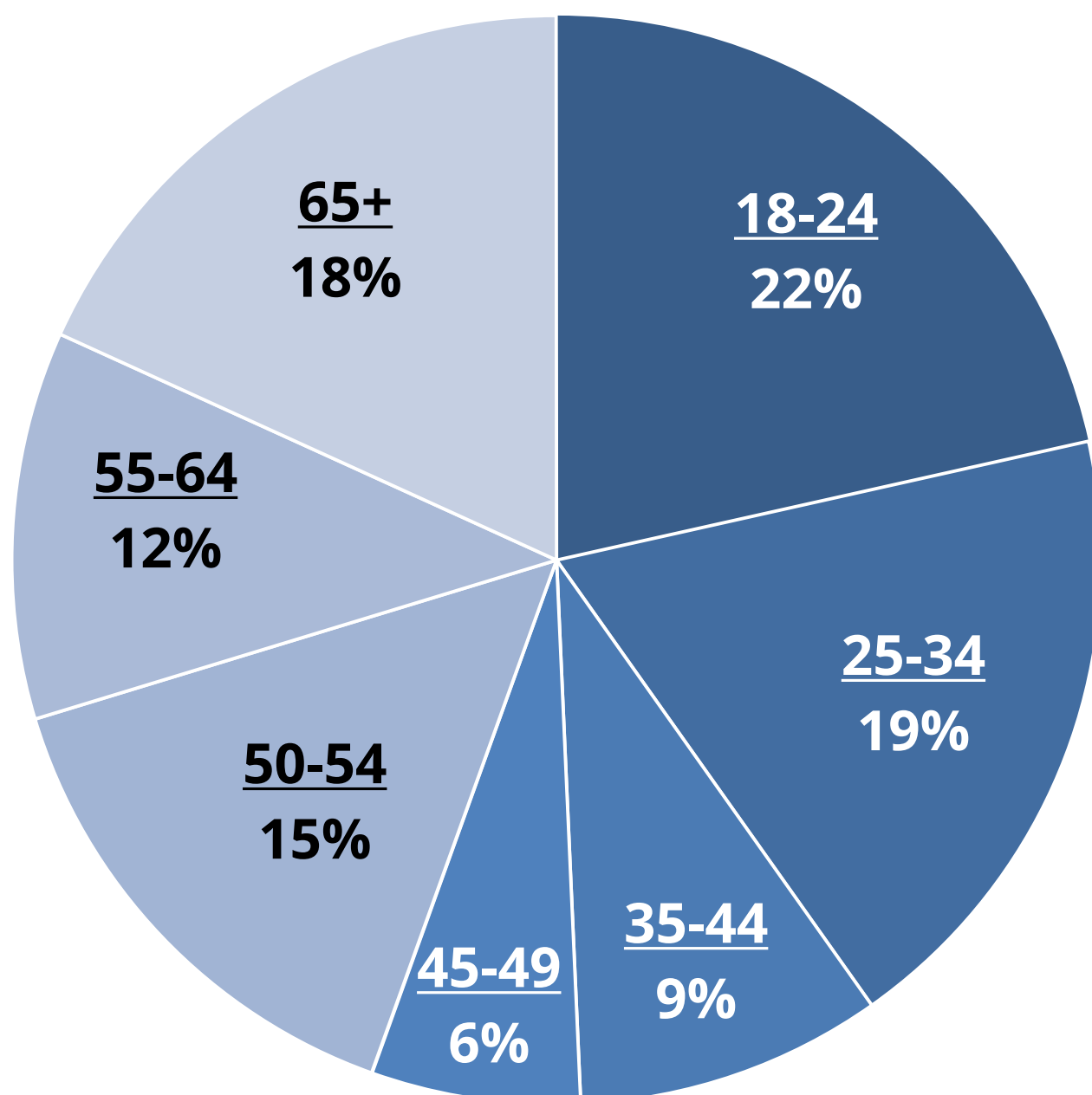
Casual Sports Fans

(20% of sports fans)
Median Age: 46

Male 56% 


Female 44% 

Age Composition



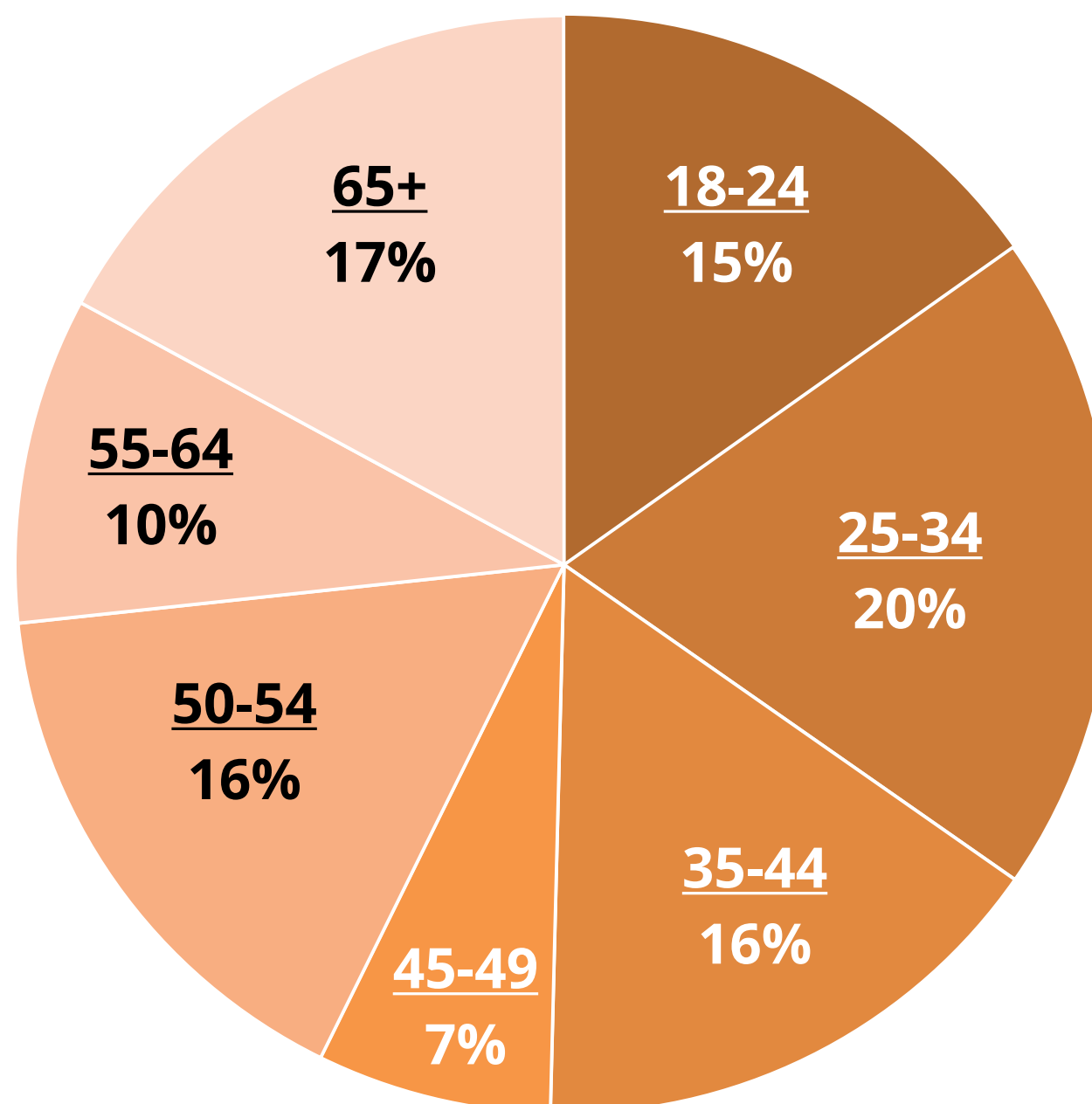
Moderate Sports Fans

(37% of sports fans)
Median Age: 44

Male 54% 

Female 46% 


Age Composition



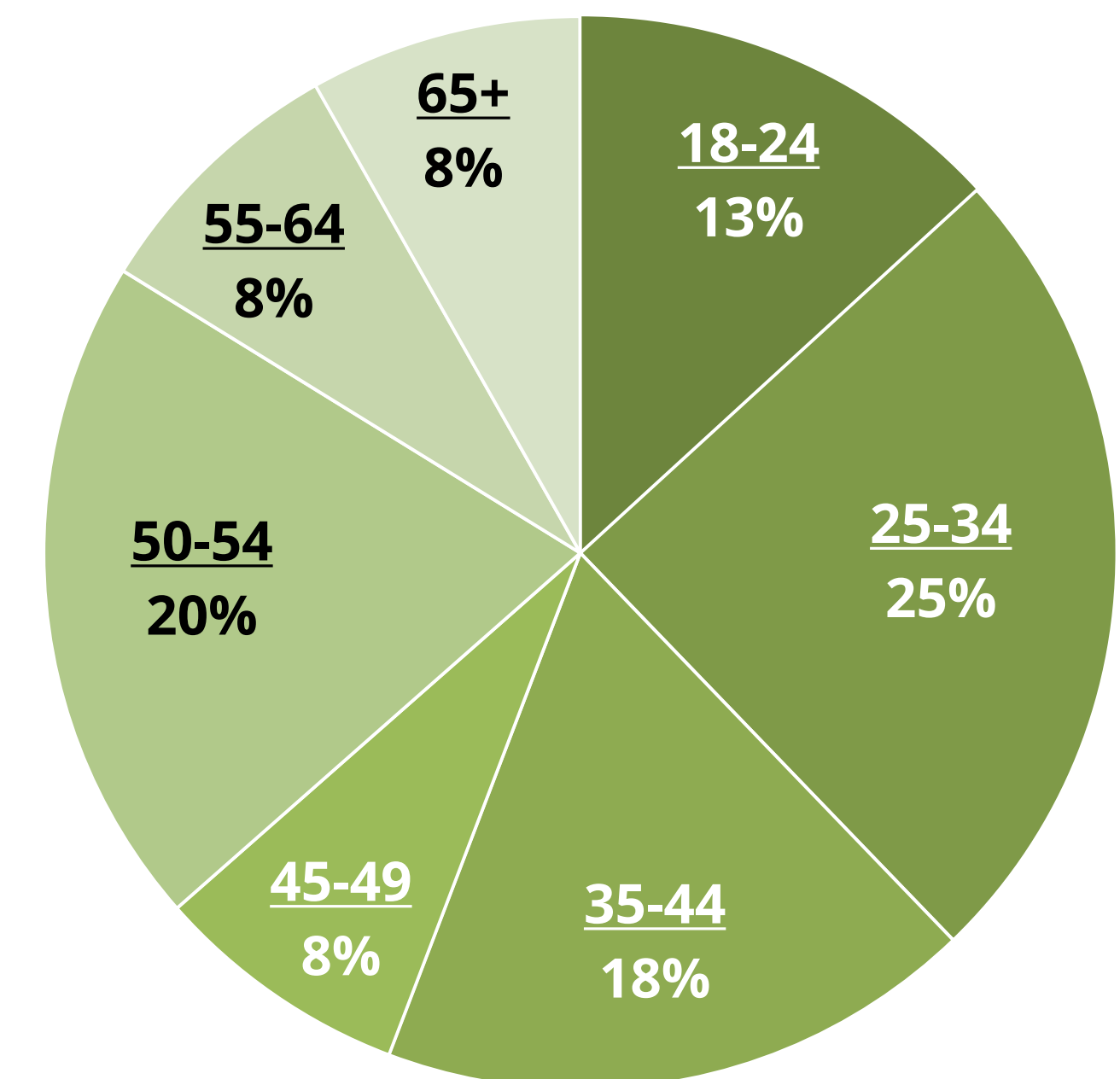
Avid Sports Fans

(43% of sports fans)
Median Age: 41

Male 68% 

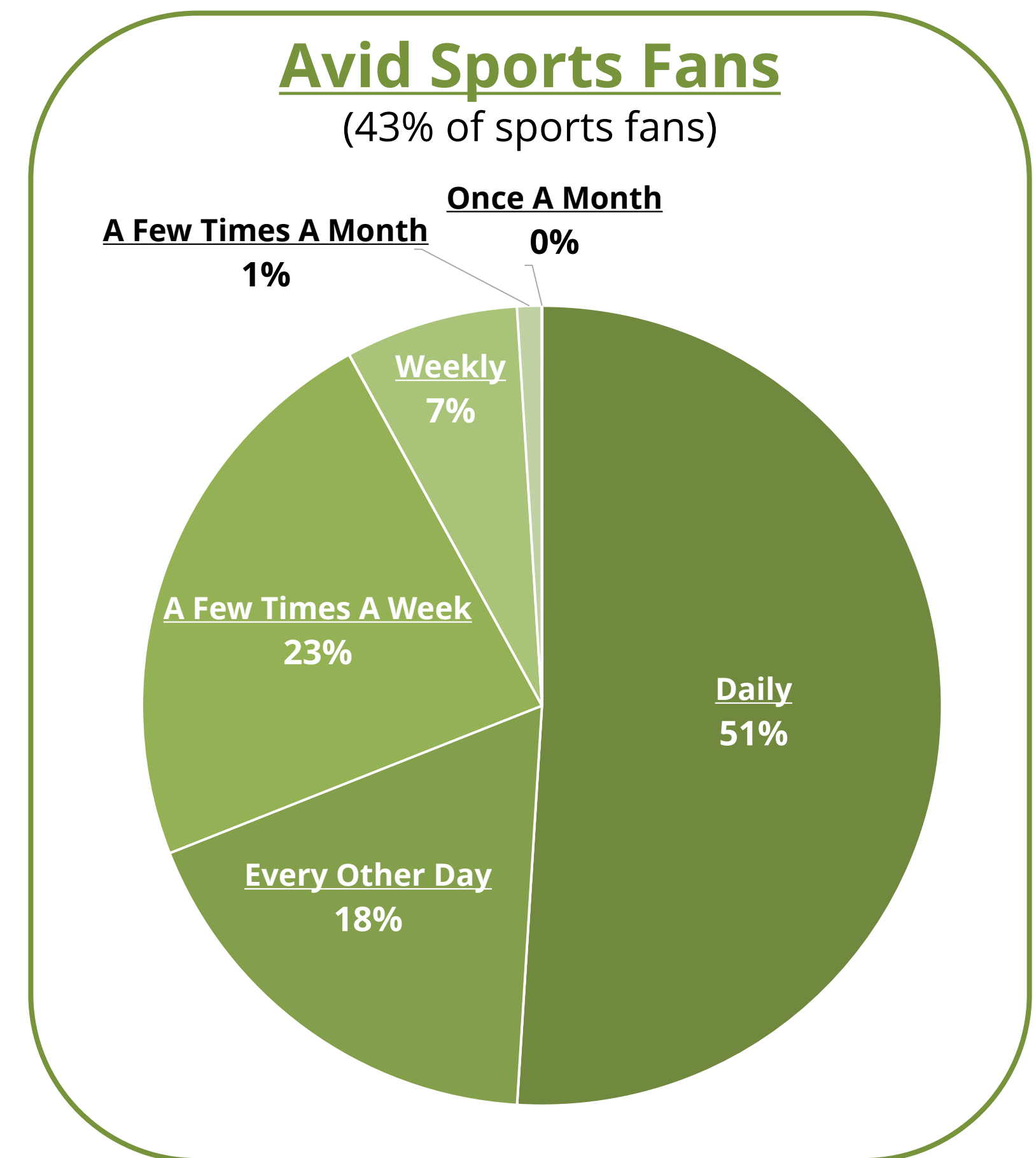
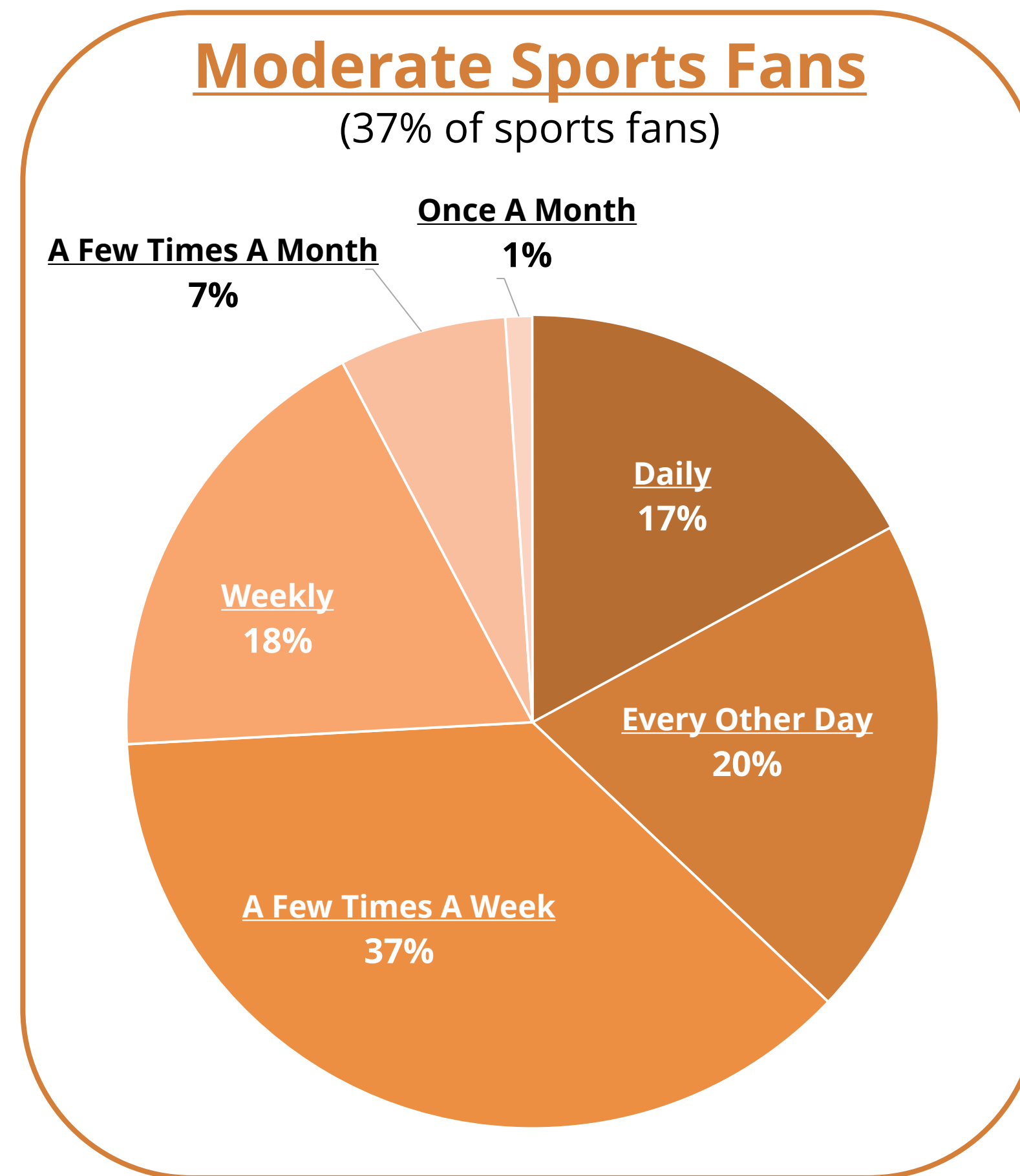
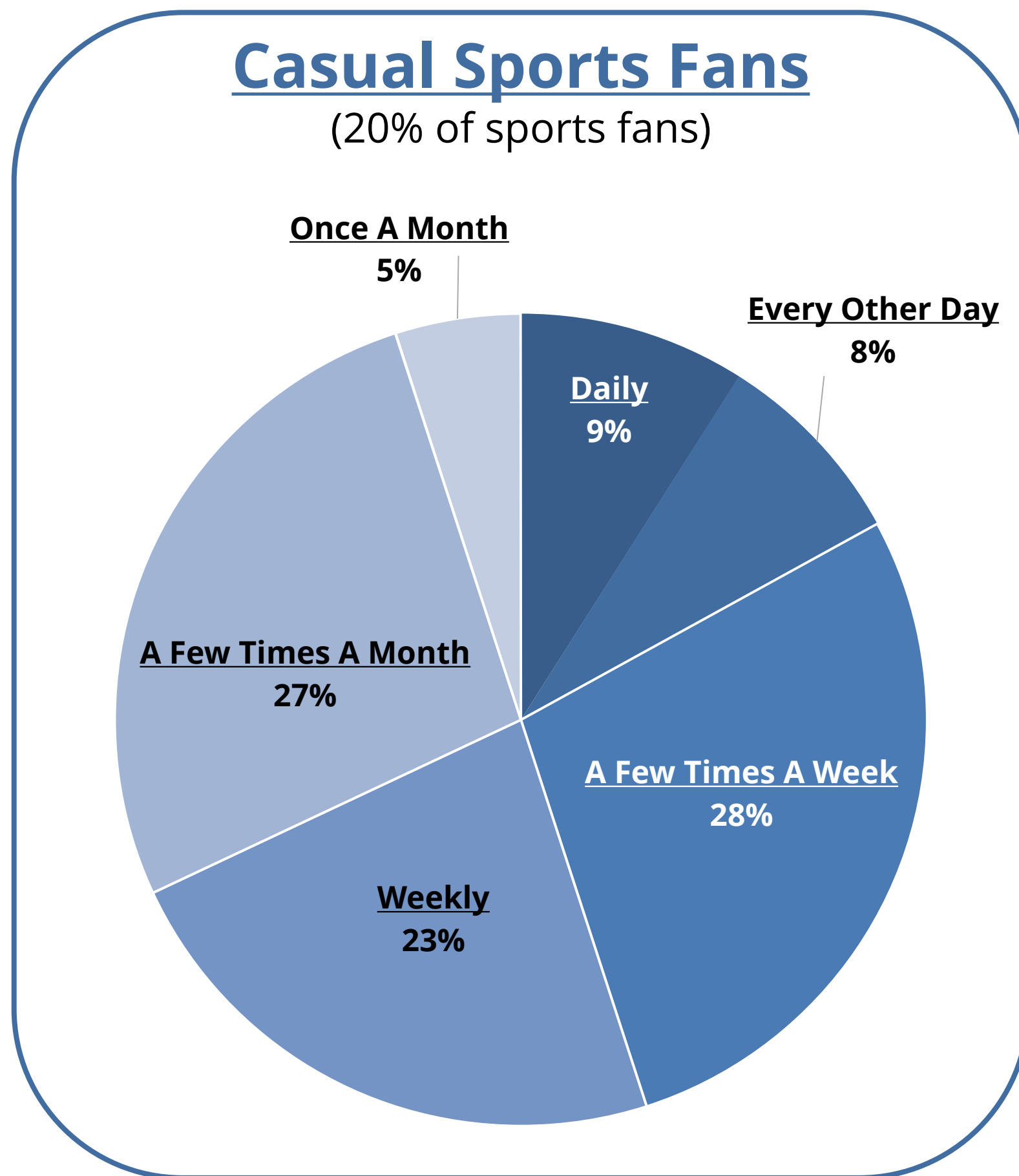
Female 32% 

Age Composition



Over Half Of All Avid Fans Watch Live Sports Daily And Even Two-Thirds Of Casual Sports Fans Watch Sports At Least On A Weekly Basis

How Often Do Sports Fans Watch Live Sports On TV*?



*TV is inclusive of all devices (ie., TV, connected-TV device, smartphone, tablet, etc) and locations (i.e., at home, at a bar/restaurant, someone else's home, etc)

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019, Survey base: self-identified sports fans, P18+. Q S4: On average, how often do you watch live sports on TV in a given month? Please indicate any viewing that takes place regardless of device (i.e., TV, smartphone, tablet, etc) or location (i.e. at home, at a bar / restaurant, someone else's home, etc). Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc), Moderate Fans Respondents (regularly watch sports on TV, routinely follow sports news, etc.), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc).

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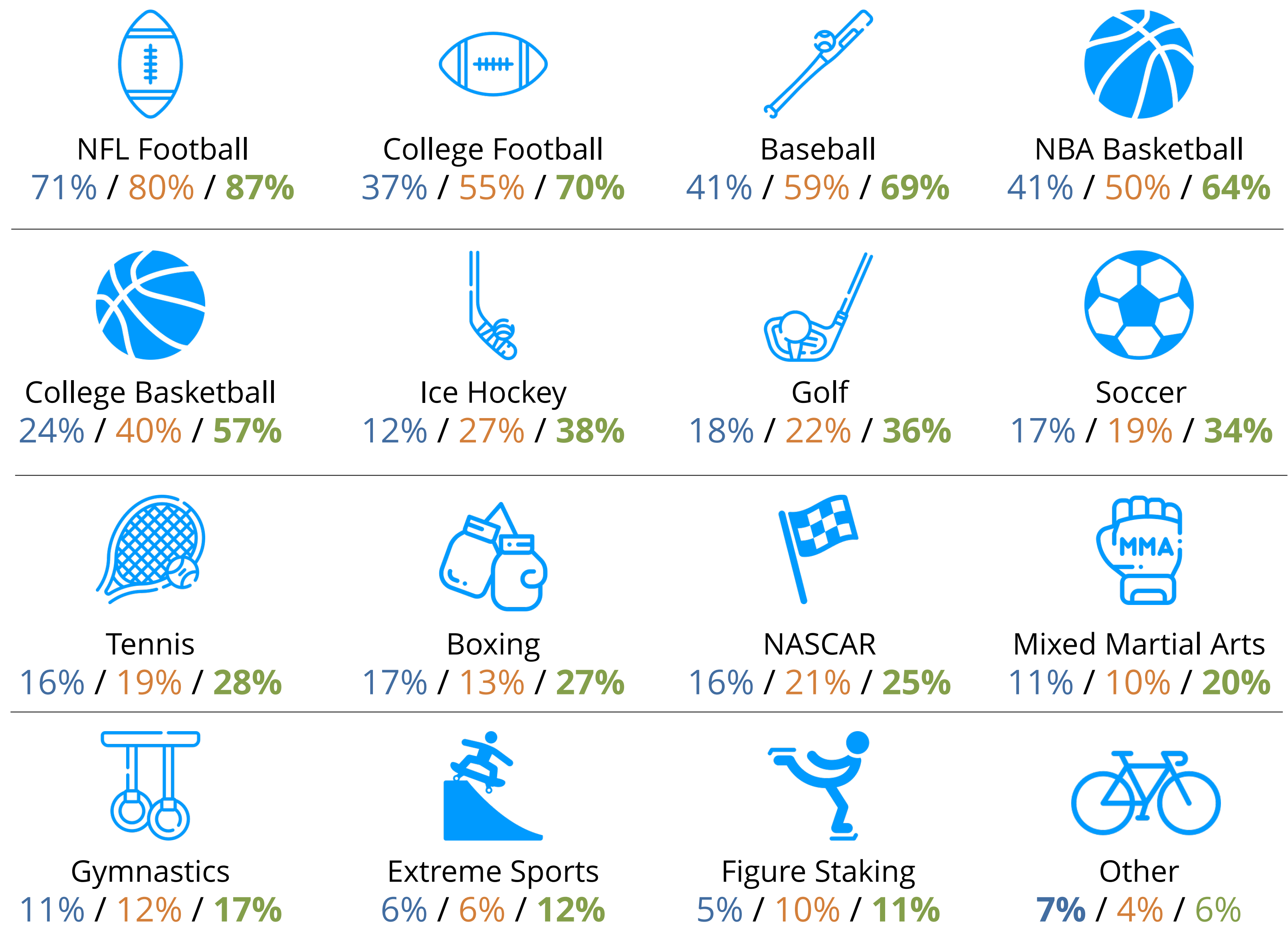
The avid fan is a voracious viewer who has a wide set of interests when it comes to sports.

While NFL is still the unquestioned leader across all levels of sports fandom, several others draw a significant audience with **11 sports** being followed by at least one-quarter of avid fans.

Four sports – **NFL, college football, MLB and NBA** – are followed by at least one-quarter of casual fans.

% of Sports Fans Who Follow Each Sport

Casual / Moderate / Avid

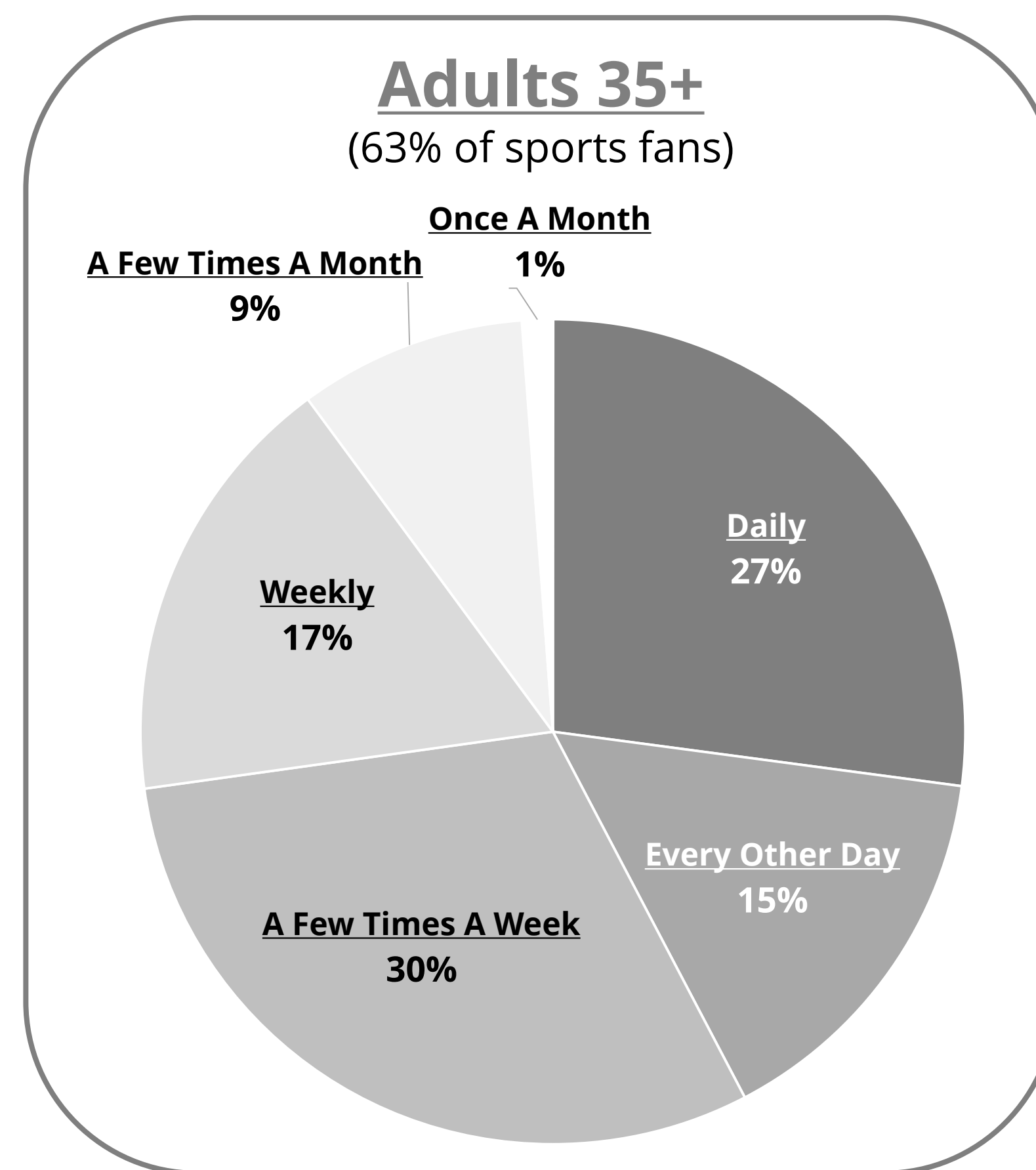
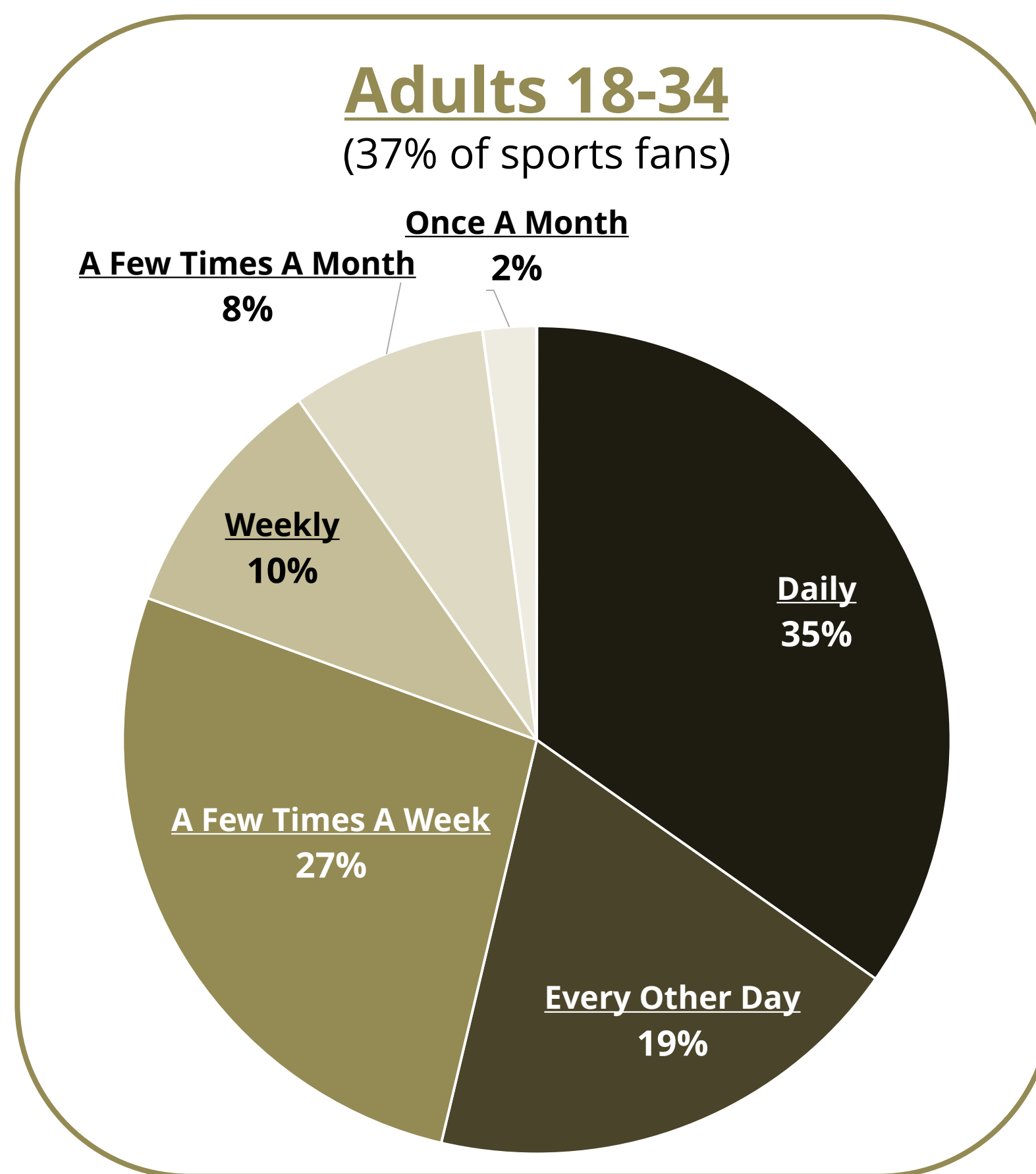
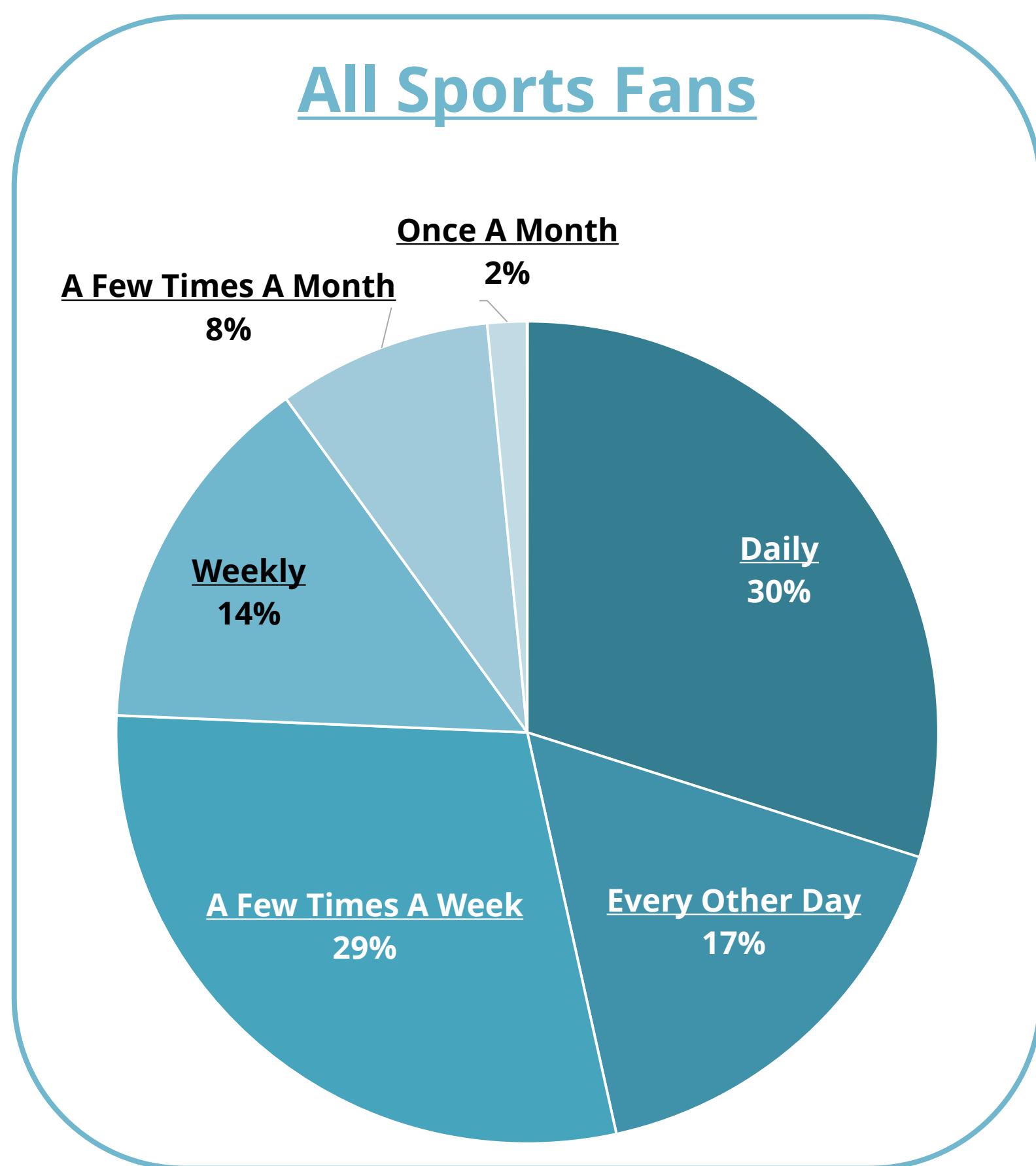


Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q8: Which sports do you follow? Note: Numbers don't add to 100% due to respondents ability to select more than one answer. Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc), Moderate Fans Respondents (regularly watch sports on TV, routinely follow sports news, etc.), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). Sorted by Avid fans' %.

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Adult 18-34 Sports Fan Are Most Likely To Watch Sports Daily Regardless Of Device Or Location And Over 80% Are Habitual Viewers Who Watch At Least A Few Times A Week

How Often Do Sports Fans Watch Live Sports On TV*?



*TV is inclusive of all devices (i.e., TV, connected-TV device, smartphone, tablet, etc) and locations (i.e., at home, at a bar/restaurant, someone else's home, etc)

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019, Survey base: self-identified sports fans, P18+. Q S4: On average, how often do you watch live sports on TV in a given month? Please indicate any viewing that takes place regardless of device (i.e., TV, smartphone, tablet, etc) or location (i.e. at home, at a bar / restaurant, someone else's home, etc). All Sports Fans based on P18+.

[+ Click here to see more demographics](#)

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Adults 18-34 are more likely to gravitate towards high-intensity sports that feature non-stop action like the **NBA, soccer** and combat sports like **boxing** and **MMA**

% of Sports Fans Who Follow Each Sport

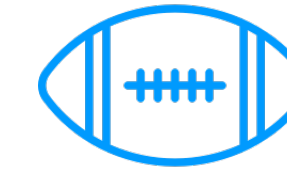
All / **Adults 18-34** / Adults 35+



NFL Football
81% / 75% / 85%



NBA Basketball
54% / **66%** / 47%



College Football
57% / 49% / **63%**



Baseball
60% / 47% / **67%**



College Basketball
44% / **44%** / 44%



Soccer
25% / **33%** / 21%



Boxing
20% / **29%** / 15%



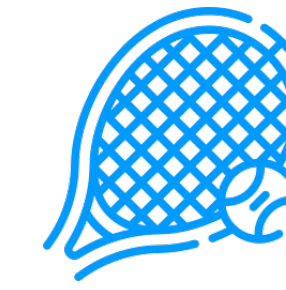
Ice Hockey
29% / 25% / **31%**



Mixed Martial Arts
15% / **23%** / 9%



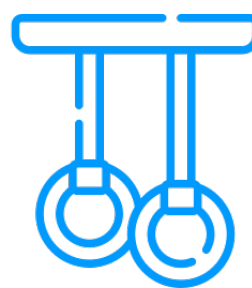
NASCAR
22% / **21%** / **22%**



Tennis
22% / 20% / **27%**



Golf
27% / 17% / **33%**



Gymnastics
14% / **15%** / 14%



Extreme Sports
9% / **13%** / 6%



Figure Skating
9% / **10%** / 9%



Other
6% / **5%** / 6%

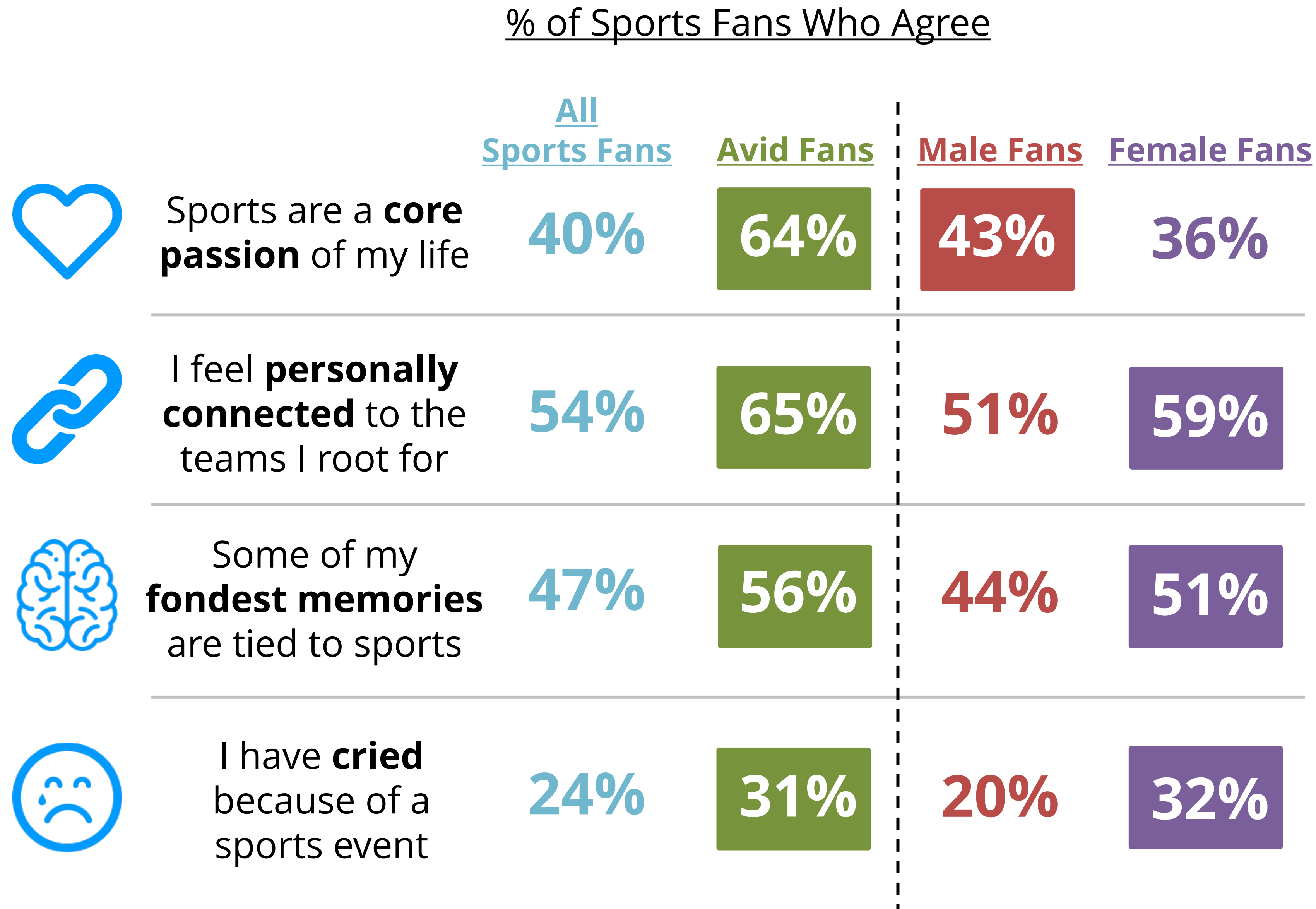
Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q8: Which sports do you follow?
Note: Numbers don't add to 100% due to respondents ability to select more than one answer. All Sports Fans based on P18+. Sorted by A18-34 fans' %.

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There is an unbridled passion that exists among sports fans.

Two-thirds of avid fans feel **personally connected** to the teams they root for and over half say that some of their **fondest memories** are tied to sports.

Furthermore, women are more likely than men to feel a personal connection to their favorite teams.



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q19: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.

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Commitment runs deep among sports fans. A significant amount of sports fans, especially younger and multicultural ones, are actually **passionate to the point of superstitious** when it comes to their favorite teams

"I have a ritual I do before or during 'big' games to help my team win"
(% who agree)

Avid Sports Fans

25%

Adults 18-34 Sports Fans

23%

Black Sports Fans

27%

Hispanic Sports Fans

24%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q20: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc).

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Sports also makes for **great, passionate conversation.**

In fact, almost half of Avid fans and female fans are willing to **share their passion, connection and memories** around sports with complete strangers

"I have talked to a stranger about a sports event, team or athlete"
(% who agree)

All Sports Fans

40%

Avid Sports Fans

48%

Male Sports Fans

38%

Female Sports Fans

43%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.

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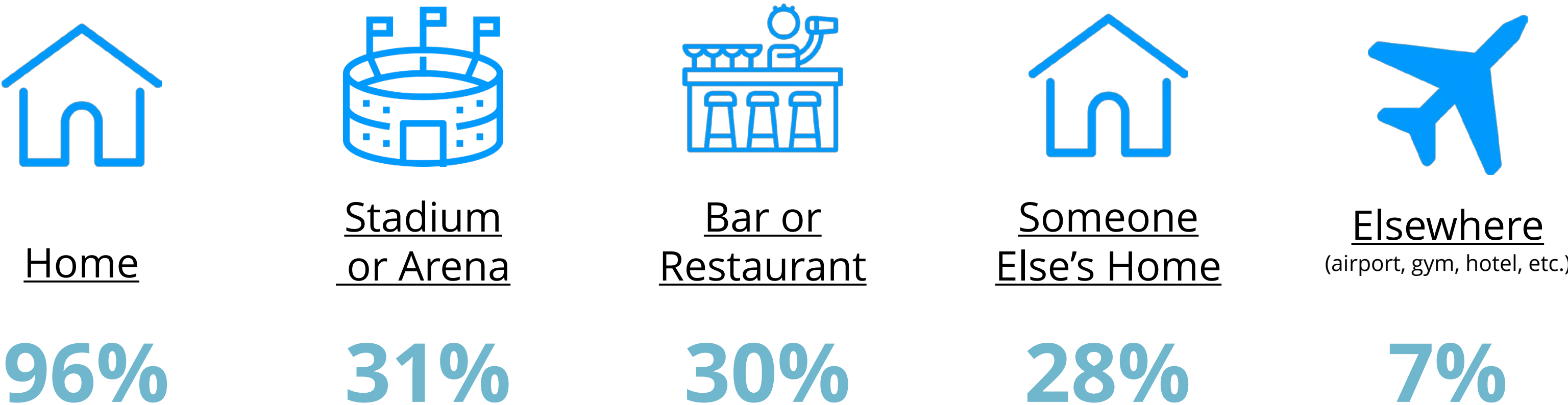
Where Do Fans Prefer To Watch Live Sports?

Quantifying Their Viewing Preferences By Location

Watching sports at home is ubiquitous among sports fans while a much lower percentage of fans – nearly one-third - typically also watch in-person at a stadium / arena or out-of-home at a bar / restaurant

Where Do Sports Fans *Typically* Watch Sports?

All Sports Fans



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base: self-identified sports fans, P18+. Q10: Where do you typically watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc). Note: Numbers don't add to 100% due to respondents ability to select more than one answer.


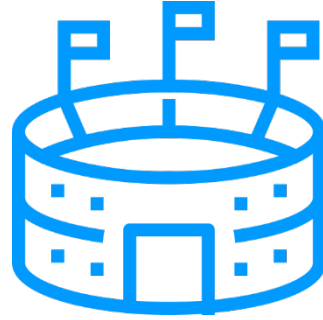
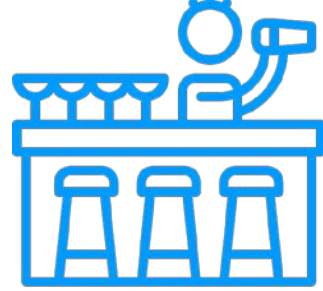


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Almost all sports fans regardless of their level of fandom, age, gender or ethnicity **watch live sports at home.**

Adults 18-34 are more likely to attend a game in-person as well as watch a game out-of-home either at a bar / restaurant or someone else's place.

Interestingly, female sports fans are more likely than males to attend a game.

Where Do Sports Fans *Typically* Watch Sports?

Sports Fan Type					
	Home	Stadium or Arena	Bar or Restaurant	Someone Else's Home	Elsewhere (airport, gym, hotel, etc.)
All	96%	31%	30%	28%	7%
Avid	98%	43%	41%	37%	12%
Moderate	96%	26%	25%	24%	4%
Casual	92%	17%	17%	17%	3%
Adults 18-34	93%	34%	35%	35%	8%
Adults 35+	98%	30%	28%	24%	7%
Male	96%	29%	30%	30%	8%
Female	96%	35%	31%	31%	6%
Black	89%	30%	28%	28%	8%
Hispanic	92%	34%	34%	34%	8%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base: self-identified sports fans, P18+. Q10: Where do you typically watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc). Note: Numbers don't add to 100% due to respondents ability to select more than one answer.

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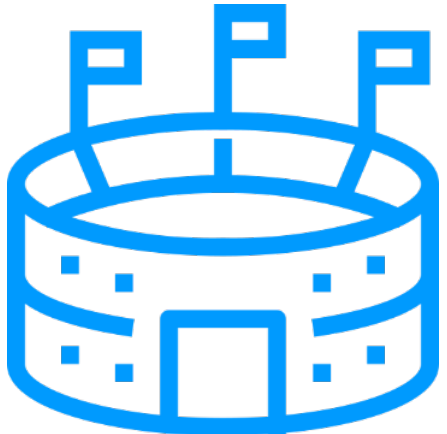
Watching sports at home is also the most preferred viewing location by far, being favored by almost **three-quarters** of all sports fans

Where Do Sports Fans *Prefer* To Watch Sports?
All Sports Fans



Home

72%



Stadium or Arena

19%



Out-Of-Home

(Bar/Restaurant, Someone Else's Home or Elsewhere)

8%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+, Q11: When thinking about the overall sports viewing experience, where do you prefer to watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc. Note: Numbers don't add to 100% due to respondents ability to select more than one answer.

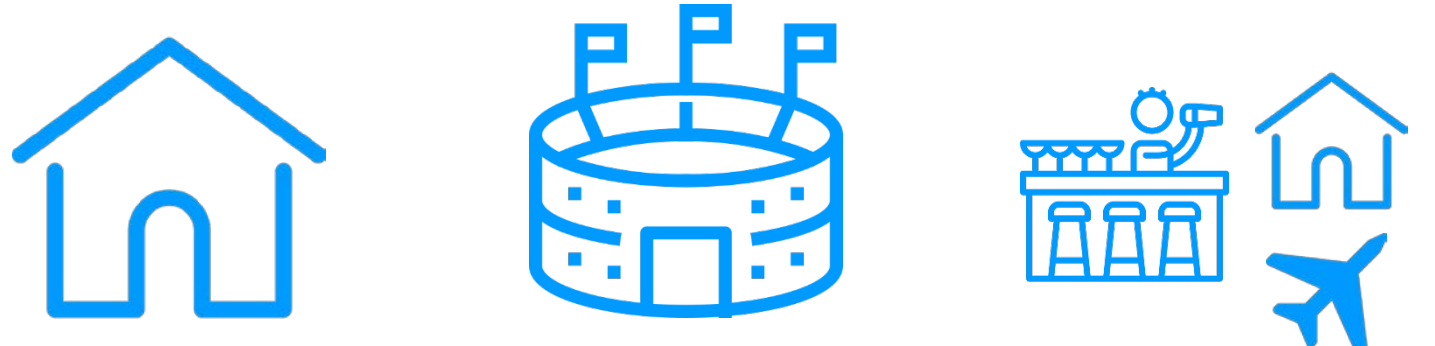
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Regardless of the type of sports fan, at least **two-thirds prefer watching sports from the comfort of their own home.**

Adults 18-34 and females are more likely than others to prefer the experience and gameday atmosphere that attending a game in-person provides.

Casual sports fans, younger demos and multicultural fans are more likely than others to prefer watching 'out-of-home' as part of larger social gatherings.

Where Do Sports Fans *Prefer* To Watch Sports?

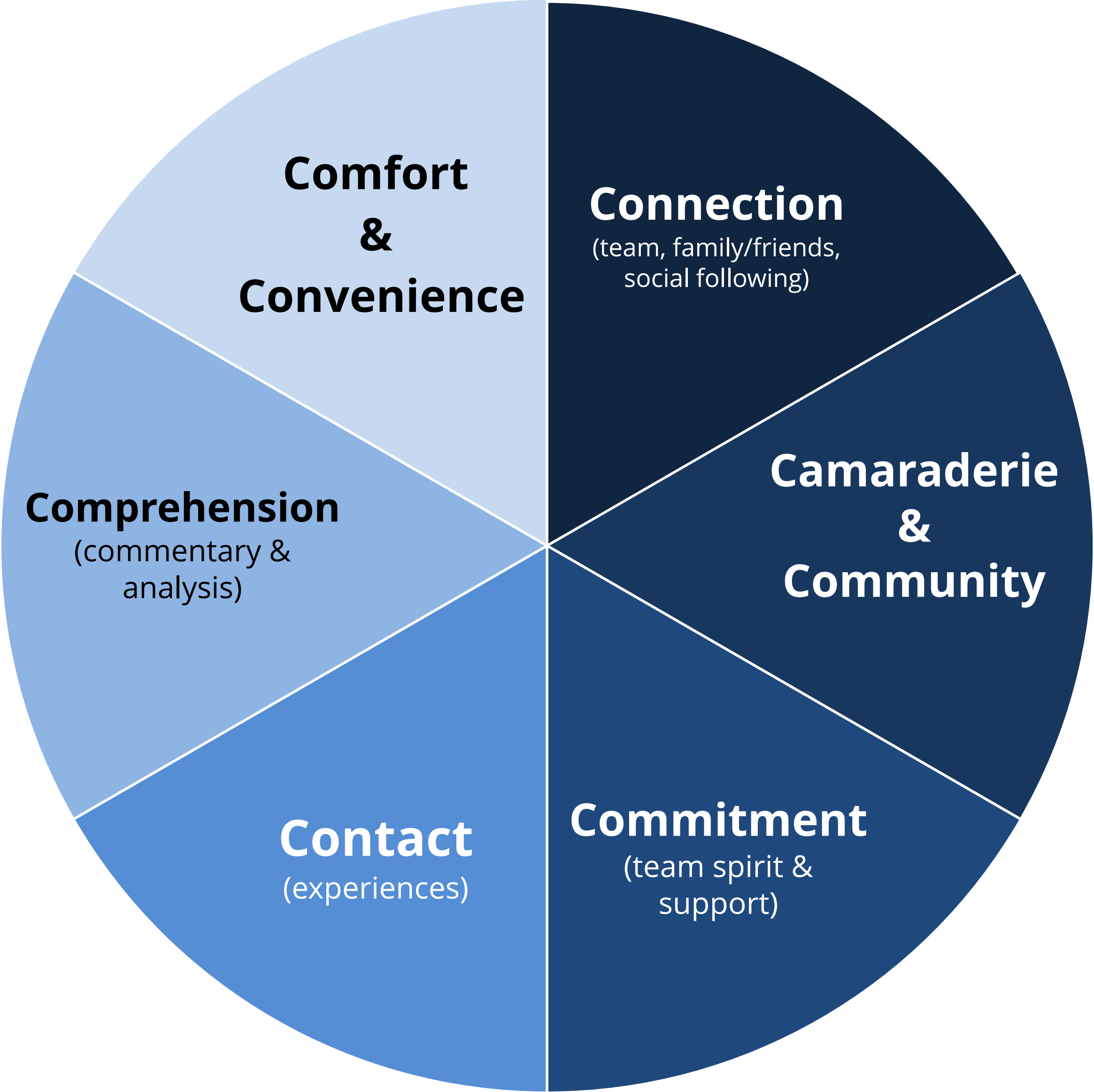


<u>Sports Fan Type</u>	<u>Home</u>	<u>Stadium or Arena</u>	<u>Out-Of-Home</u> (Bar/Restaurant, Someone Else's Home or Elsewhere)
All	72%	19%	8%
Avid	71%	22%	8%
Moderate	75%	19%	6%
Casual	70%	16%	14%
Adults 18-34	66%	23%	11%
Adults 35+	76%	17%	7%
Male	74%	18%	9%
Female	70%	22%	7%
Black	65%	17%	19%
Hispanic	67%	18%	14%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+, Q11: When thinking about the overall sports viewing experience, where do you prefer to watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc. Note: Numbers don't add to 100% due to respondents ability to select more than one answer.

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As we'll showcase in the next few sections, within the totality of at-home viewing and in-person event attendance, **sports satisfies several essential human need-states** for all types of fans – from casual to avid, young and old, male and female and across all ethnicities



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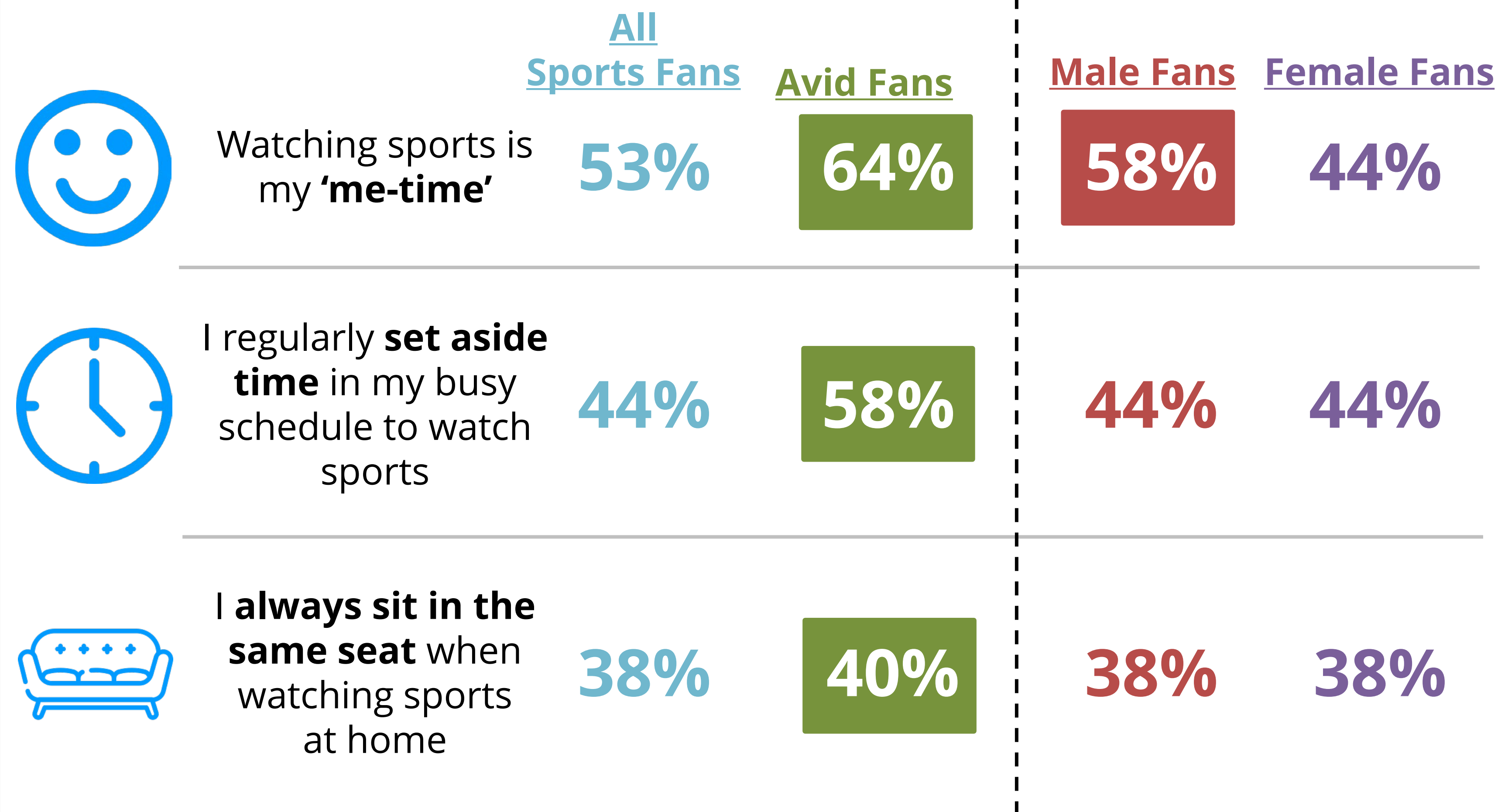
Comfort & Convenience are key needs fulfilled by watching sports at home.
92% of all sports fans enjoy home viewing because TV provides them
a front row seat to any game they want to watch

There's a comfort to watching sports at home as almost two-thirds of avid fans and over half of males consider it their **'me-time.'**

Over half of avid fans **regularly set aside time** in their schedule to watch sports.

And while some fans have a ritual to will their teams to a win, many also have a **routine** where they sit in the same seat when watching sports.

% of Sports Fans Who Agree With The Following Statements



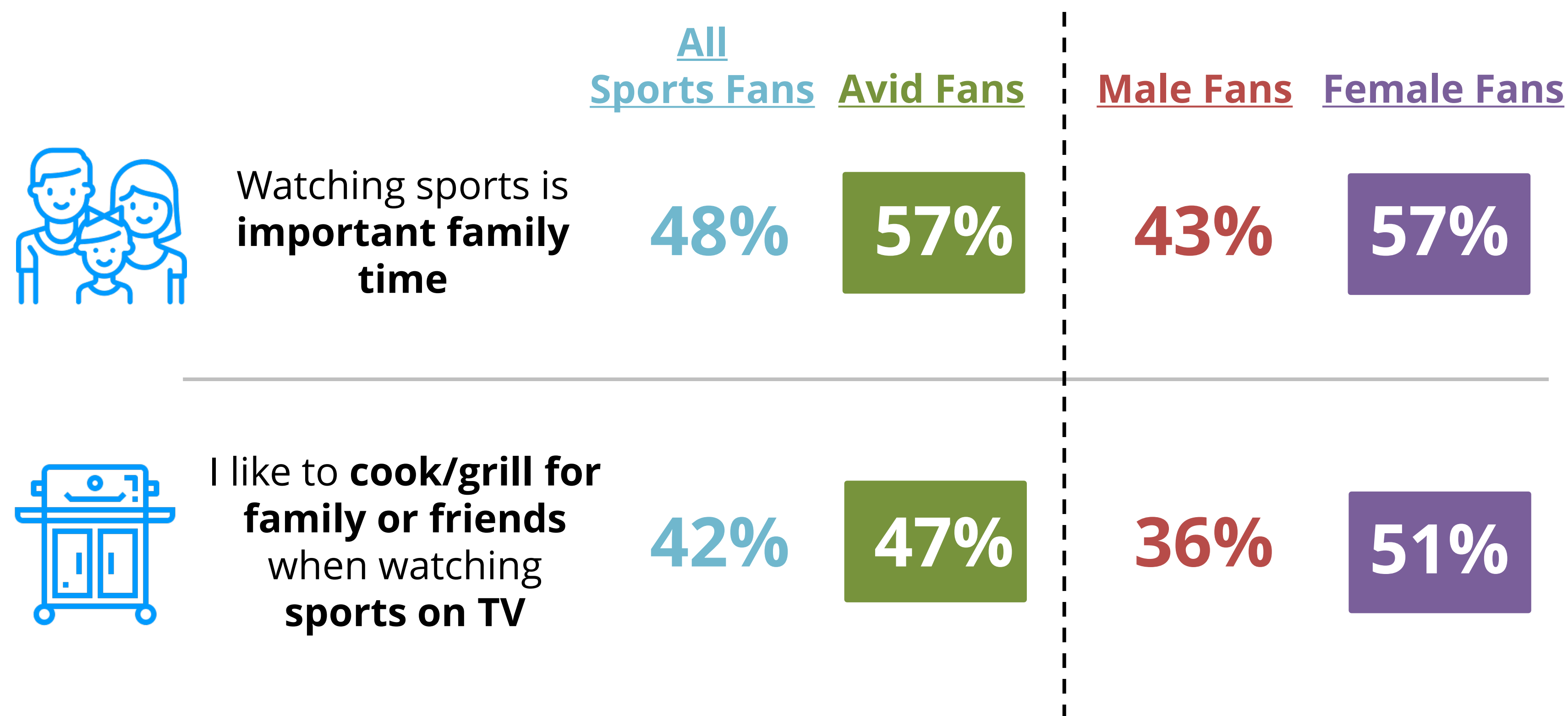
Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q19 & Q20: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

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Live sports also creates **valuable occasions** to bring **friends and family together** in the home, especially for females.

Over half of female fans think watching sports is an **important family activity**, this leads many to make the occasion even more of an event by cooking / grilling for their guests.

% of Sports Fans Who Agree With The Following Statements



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18 & Q19: Which of the following statements do you believe are true for you?, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

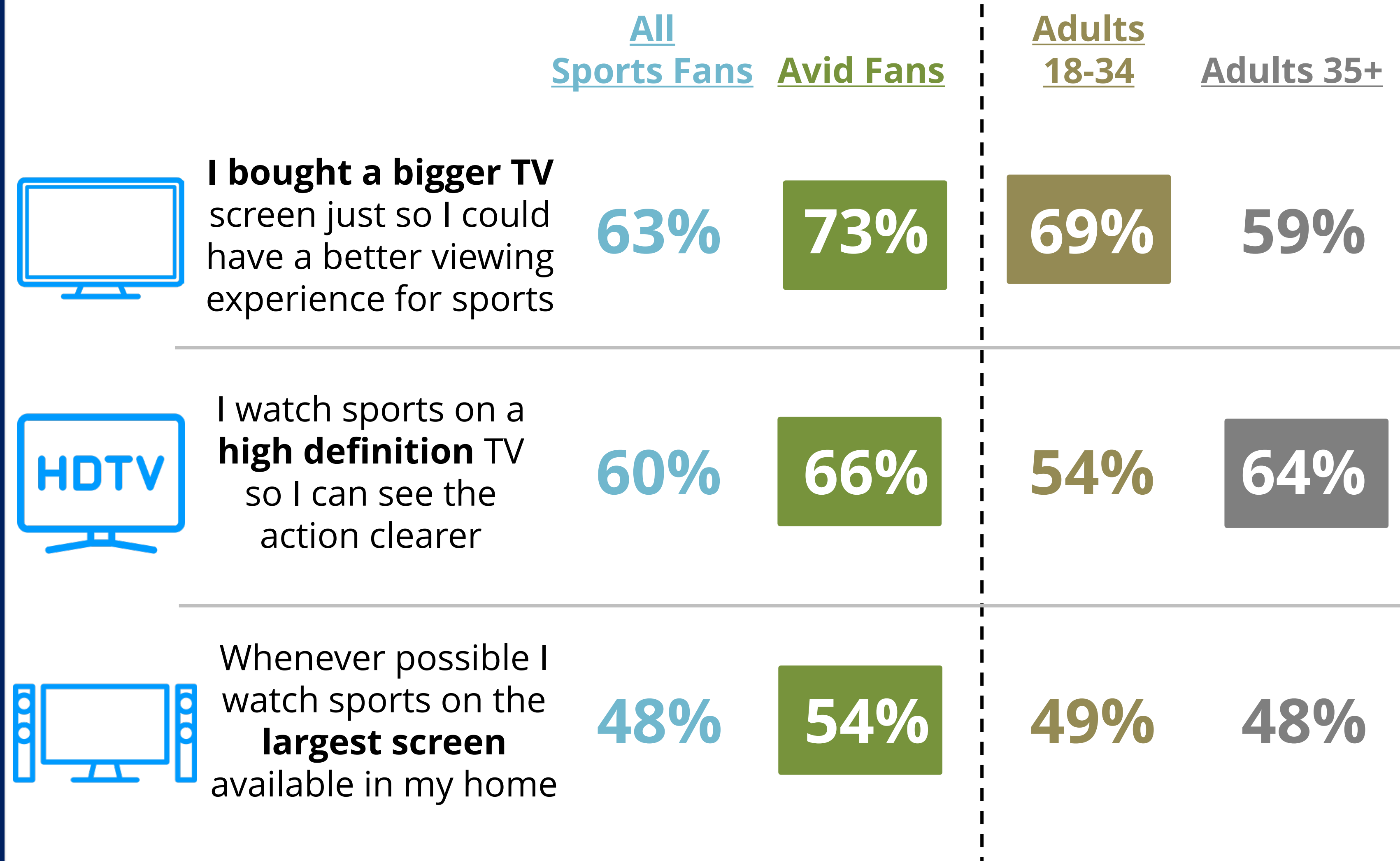
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Whether it's because of comfort or an occasion, fans prefer to watch sports on the **largest, clearest screen possible.**

In fact, **almost 70%** of adults 18-34 have **bought a bigger TV** just so they could have a better sports viewing experience.

With that said, there is also a **growing acceptance** of sports **viewing across all video devices** as only about half of sports fans need to always watch sports on the largest screen available.

% of Sports Fans Who Agree With The Following Statements



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q17: Please rate how much you agree or disagree with the following statement (Top 2 Box: Somewhat Agree & Strongly Agree), Q20: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.

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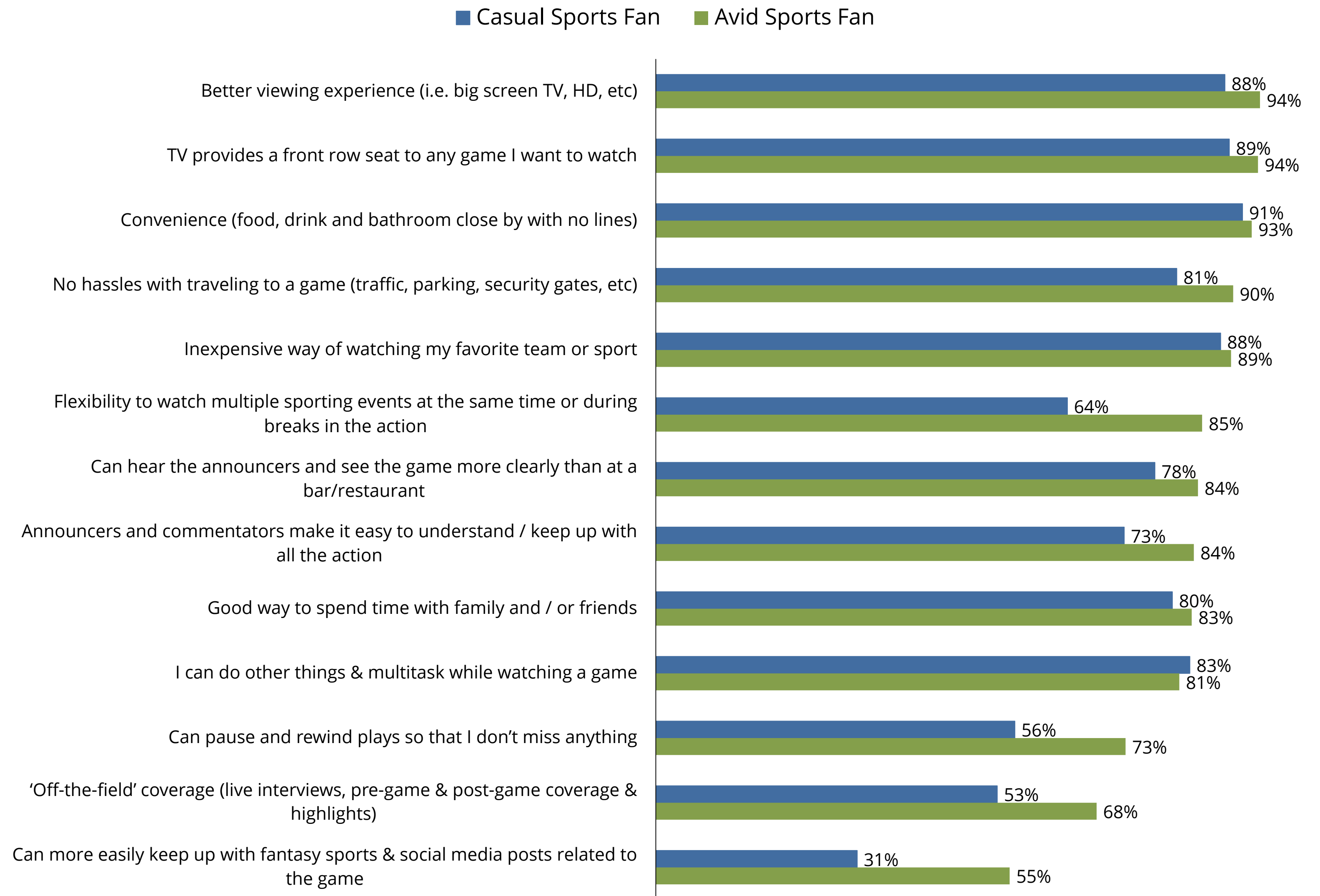
Watching sports at home satisfies the **six essential need-states**.

In particular, avid and casual fans both like watching sports at home because of the **better viewing experience**, ability to have a **front row seat** to every game and the **convenience** and **comfort** as opposed to the hassles involved with attending a game.

Avid fans also appreciate the **flexibility** that comes with home viewing including watching multiple games and the **comprehensive coverage** that TV networks provide.

Main Reasons Why Fans Watch Live Sports At Home

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important). Based on respondents who prefer watching sports at home via Q11. Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). Sorted on Avid sports fans' %.

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Comfort, Convenience And Viewing Experience Are Also The Main Reasons Other Audience Segments Enjoy Watching Sports At Home

93%

of **married** sports fans believe that TV provides them a **front row seat** to any game they want to watch

92% / 91%

of **single** sports fans & sports fans with **kids** both like the **conveniences of watching at home**

(food & drink easily available, a bathroom with no lines, etc)

87%

of **Black** sports fans like **not having any of the hassles** associated with going to a game

(traffic, parking, security gates, etc)

88%

of Hispanic sports fans prefer watching at home for the **better viewing experience**

(big screen TV, HDTV, etc)

Beyond the TV screen, **social media enhances the sports viewing experience** at home, especially among younger & multicultural fans.

In fact, three-fourths of black sports fans say they are **more actively engaged** in watching live sports on TV because of the related posts they read on social media platforms.

"Following social media posts keeps me more actively engaged in watching live sports on TV"

(% who agree)

Avid Sports Fans

52%

Adult 18-34 Sports Fans

69%

Black Sports Fans

74%

Hispanic Sports Fans

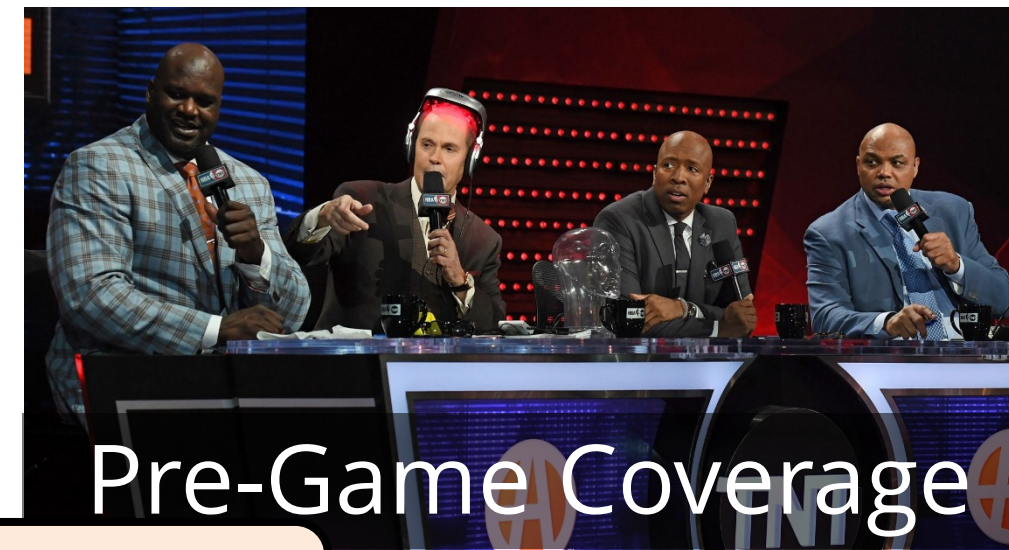
59%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q17: Please rate how much you agree or disagree with the following statement (Top 2 Box: Somewhat Agree & Strongly Agree), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc).

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When it comes to watching sports at home, fans, especially avid ones, enjoy the **360-degree experience** that TV networks provide which includes play-by-play commentary and analysis, multiple camera angles and replays.

This experience goes well beyond the field too, beginning with **pre-game coverage** and ending with **post-game highlights and interviews**.



Pre-Game Coverage

"I enjoy watching pre-game coverage and post-game highlights"
70% / 81%



Game Preview

All Sports Fans / Avid Sports Fans

"Hearing the announcers and commentators makes it easier to keep up with the action"*
80% / 84%



Post-Game Highlights

"Watching 'off-the-field' coverage (including live interviews, highlights, etc) is important to me"*
62% / 68%



Game Commentary

"I have a better experience watching a sporting event on TV due to the different camera angles & replays"
77% / 79%



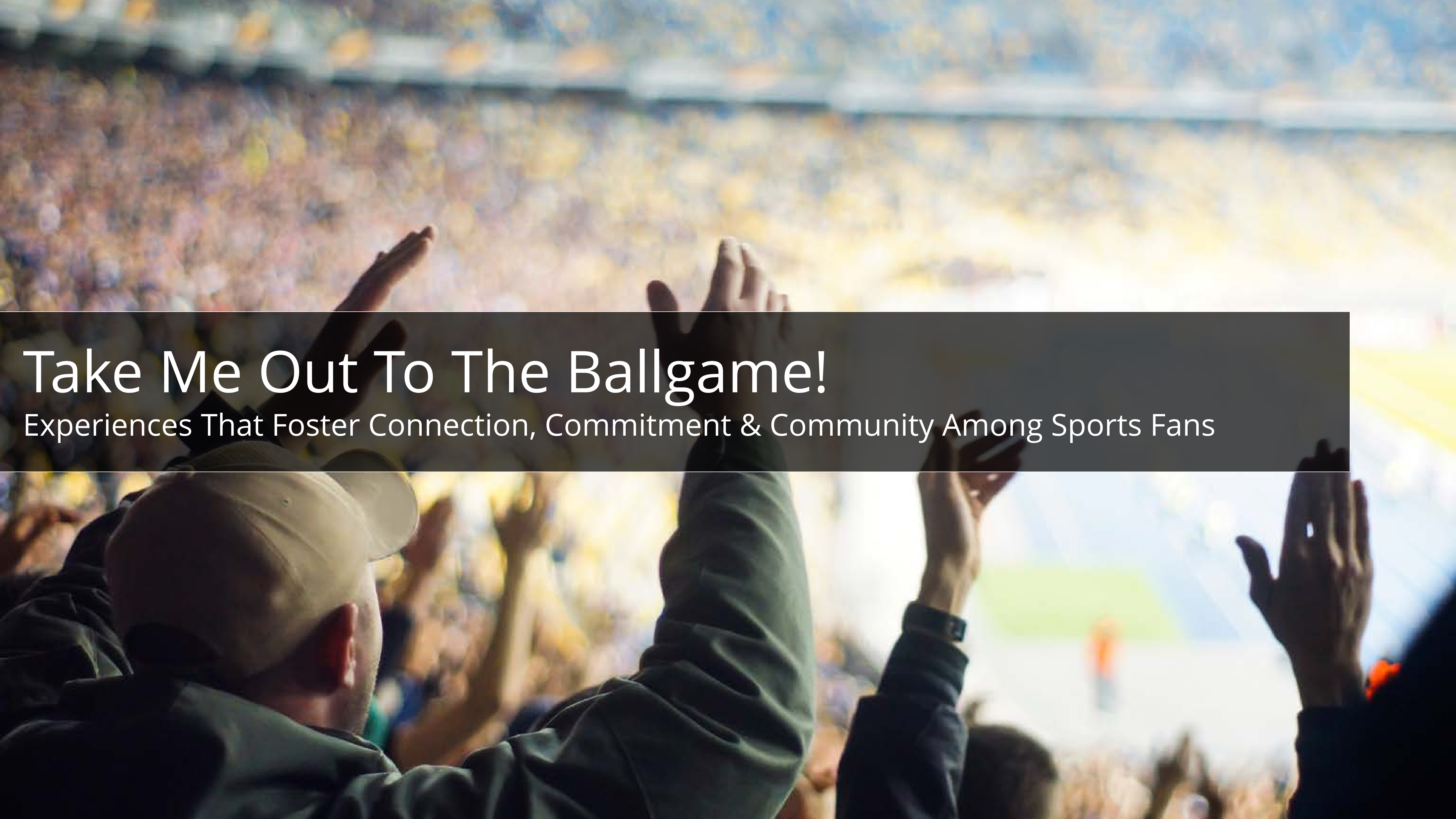
Live Interviews



Instant Replay

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. *Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important, (based on respondents who prefer watching sports at home via Q11). Q17: Please rate how much you agree or disagree with the following statement (Top 2 Box: Somewhat Agree & Strongly Agree), (based on respondents who prefer watching sports at home via Q11), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.

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Take Me Out To The Ballgame!

Experiences That Foster Connection, Commitment & Community Among Sports Fans

Seven Out Of 10 Sports Fans Have Attended A Game Over The Past Two Years

% Of Sports Fans That Have Attended A Professional Or Collegiate Sports Event In The Past Two Years

All Sports Fans

72%

Adults 18-34 / 35+

79% / 67%

Casual / Avid

52% / 83%

Male / Female

72% / 71%

Black / Hispanic

76% / 83%

Single / With Kids

70% / 78%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019, Survey base = self-identified sports fans, P18+, Q14: Have you attended a professional or collegiate sports event in the past two years? (i.e. MLB, NBA, NFL, NHL, NCAA Football, etc.). Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc) Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

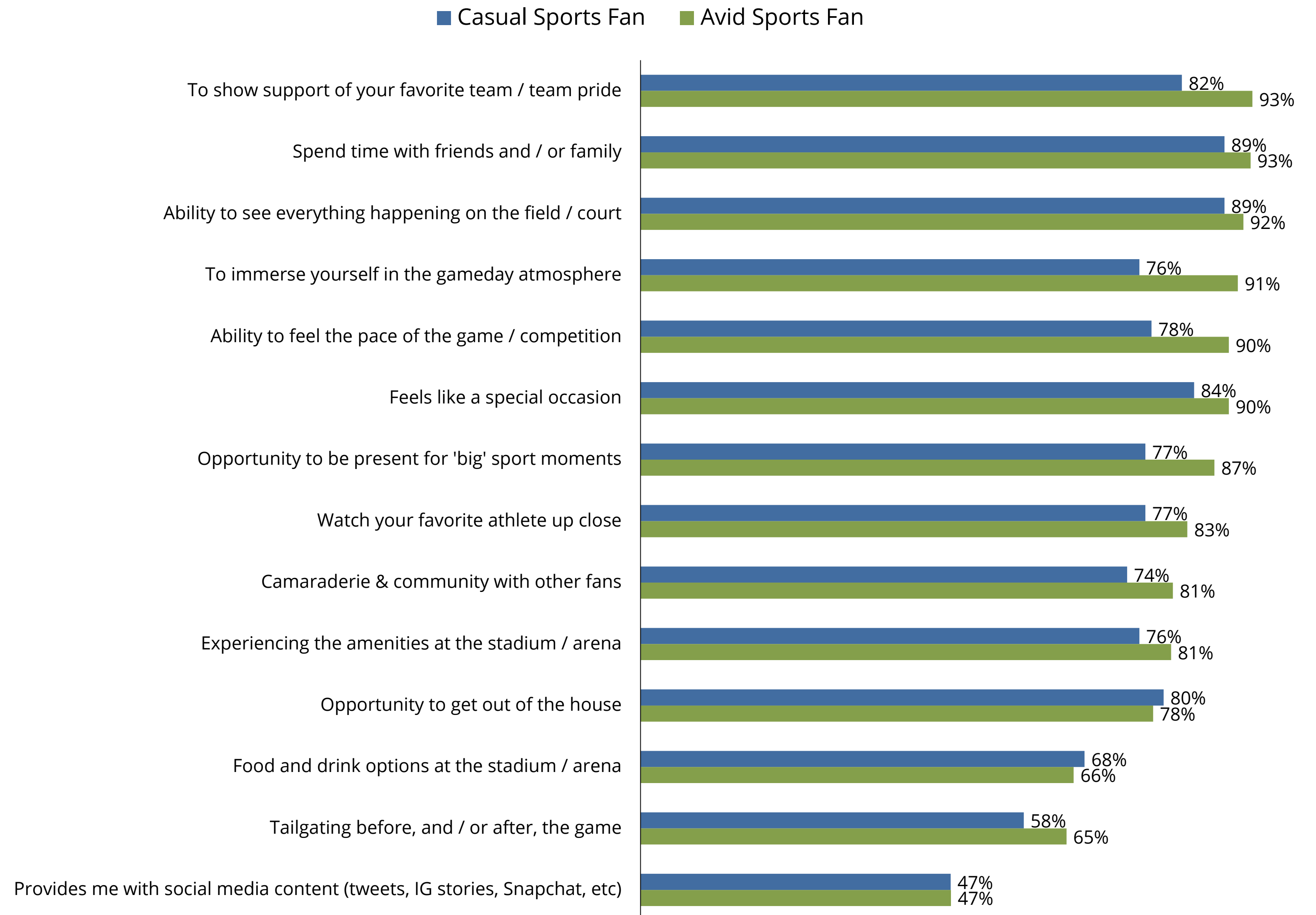
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Both avid and casual fans crave the **communal experience** that attending live sporting events provide and the ability to **see everything** happening on the field.

Avid fans also like to show their **team pride and support** while immersing themselves in the **gameday atmosphere** with the potential to be present for **'big' sports moments**.

Why Do Fans Attend Sporting Events In Person?

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



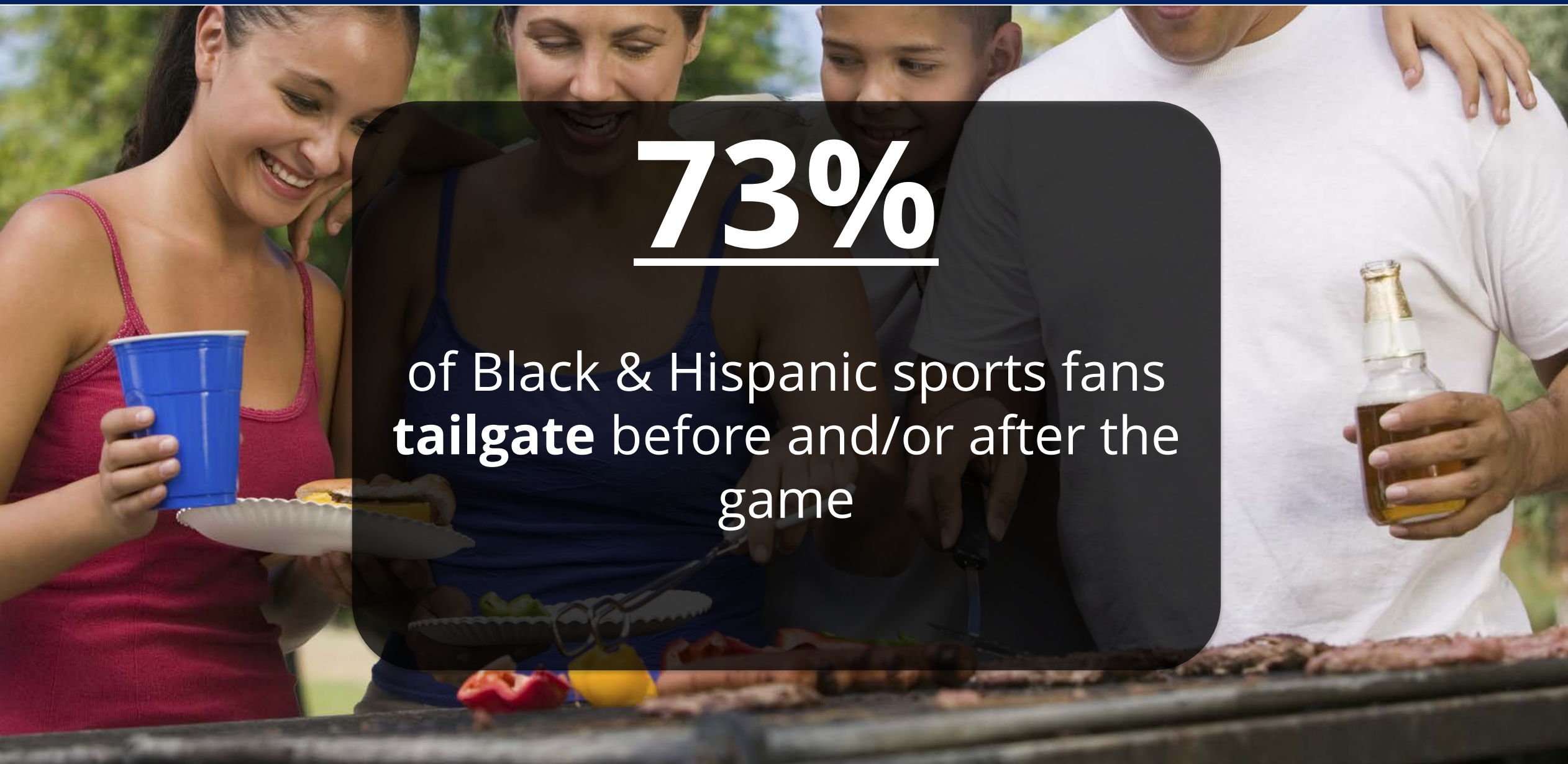
Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q15: Please rate how important the following are in your decision to attend a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Based on respondents who have attended a professional or collegiate sports event in the past two years via Q14. Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). Sorted on Avid sports fans' %.

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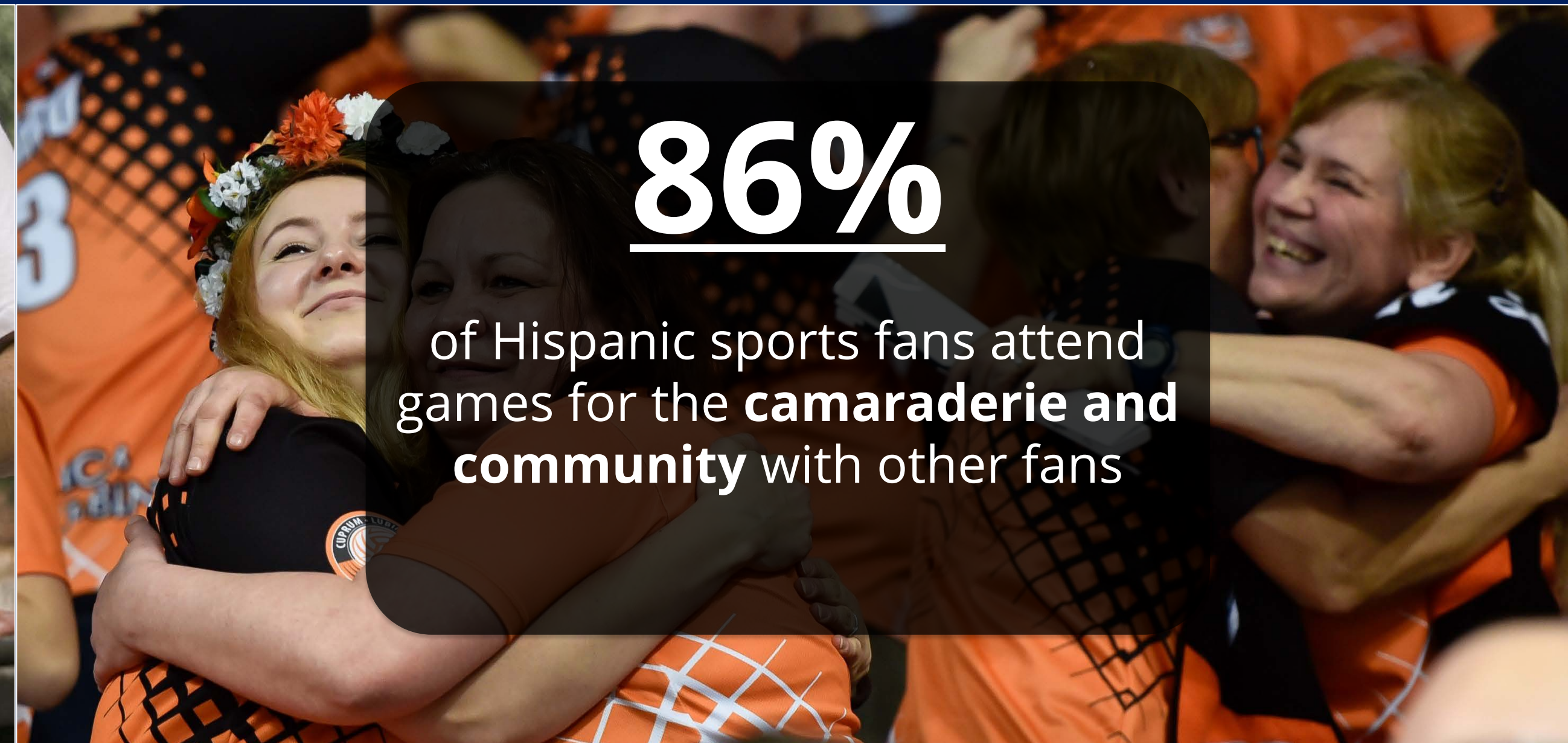
[Click here to see more demographics](#)

Unique Social Experiences And The Feeling Of Camaraderie And Community Are Main Reasons That Other Audience Segments Attend Live Sporting Events As Well



73%

of Black & Hispanic sports fans **tailgate** before and/or after the game



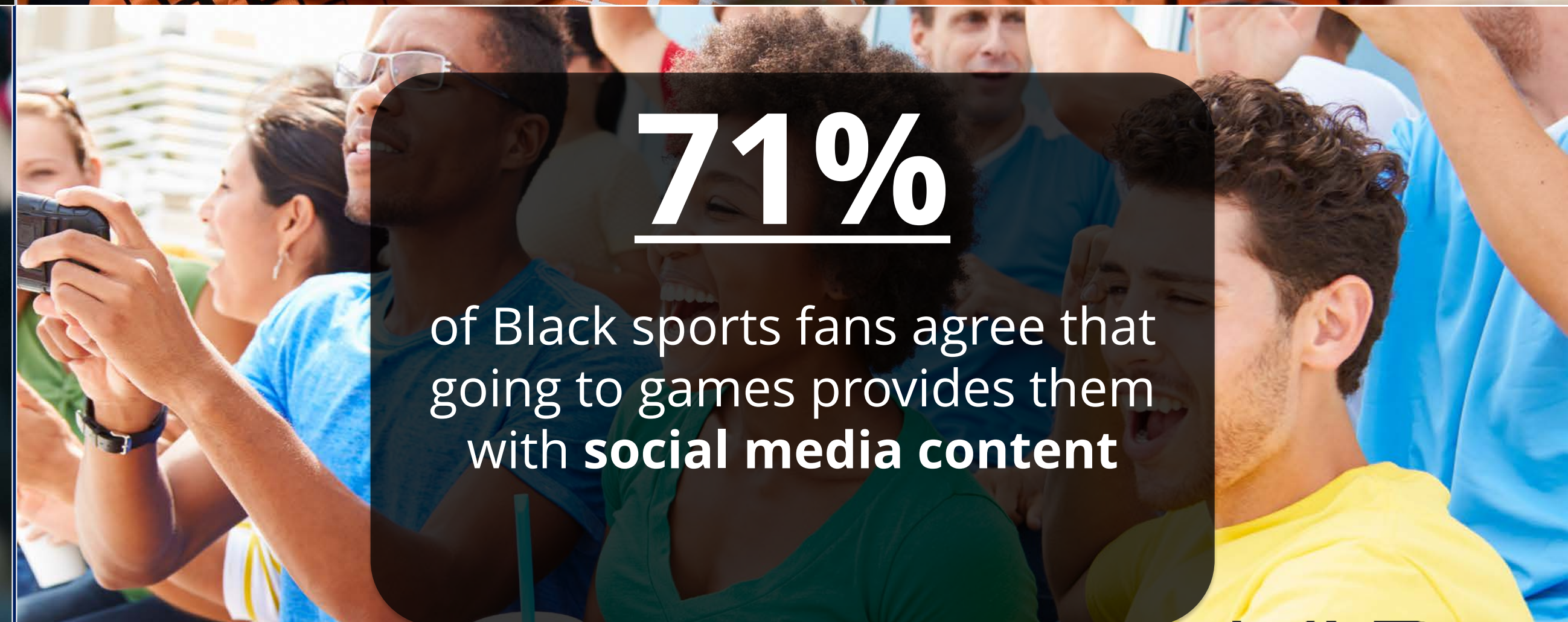
86%

of Hispanic sports fans attend games for the **camaraderie and community** with other fans



85%

of sports fans that live in metro areas/big cities attend games as an opportunity to **get out of the house**



71%

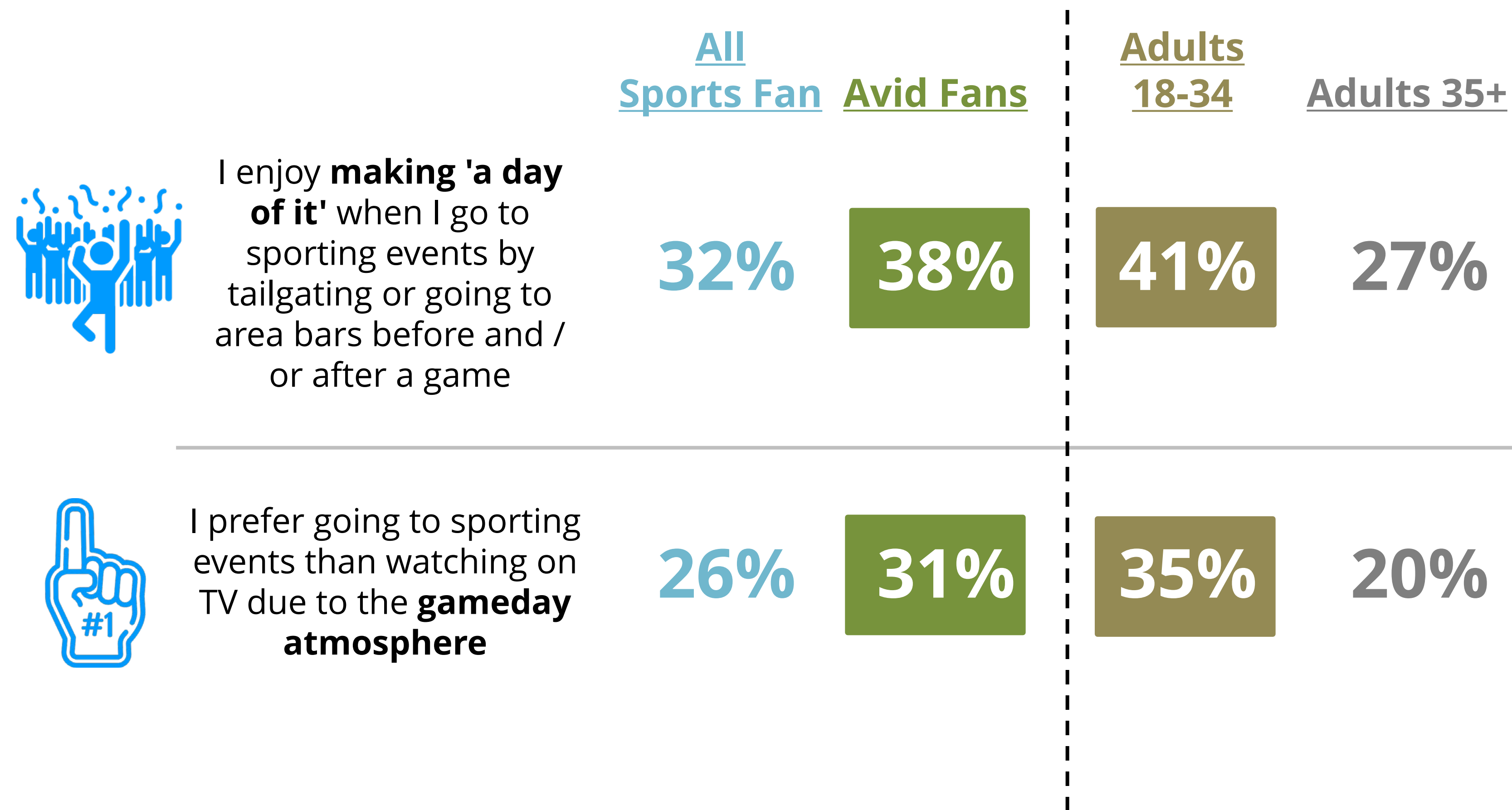
of Black sports fans agree that going to games provides them with **social media content**

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q15: Please rate how important the following factors are in your decision to attend a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Based on respondents who have attended a professional or collegiate sports event in the past two years via Q14.

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In fact, when it comes to creating **unique social experiences** and taking part in **camaraderie & community**, a significant portion of fans, especially younger demos, enjoy **making 'a day of it'** and soaking up the **gameday atmosphere** – both in and around the stadium – before, during and after a sporting event

% of Sports Fans Who Agree With The Following Statements



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q13: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

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However, **only 29% of avid sports fans** and **23% of all sports fans** say they attend *more* sporting events now than they have in the past

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q13: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc),

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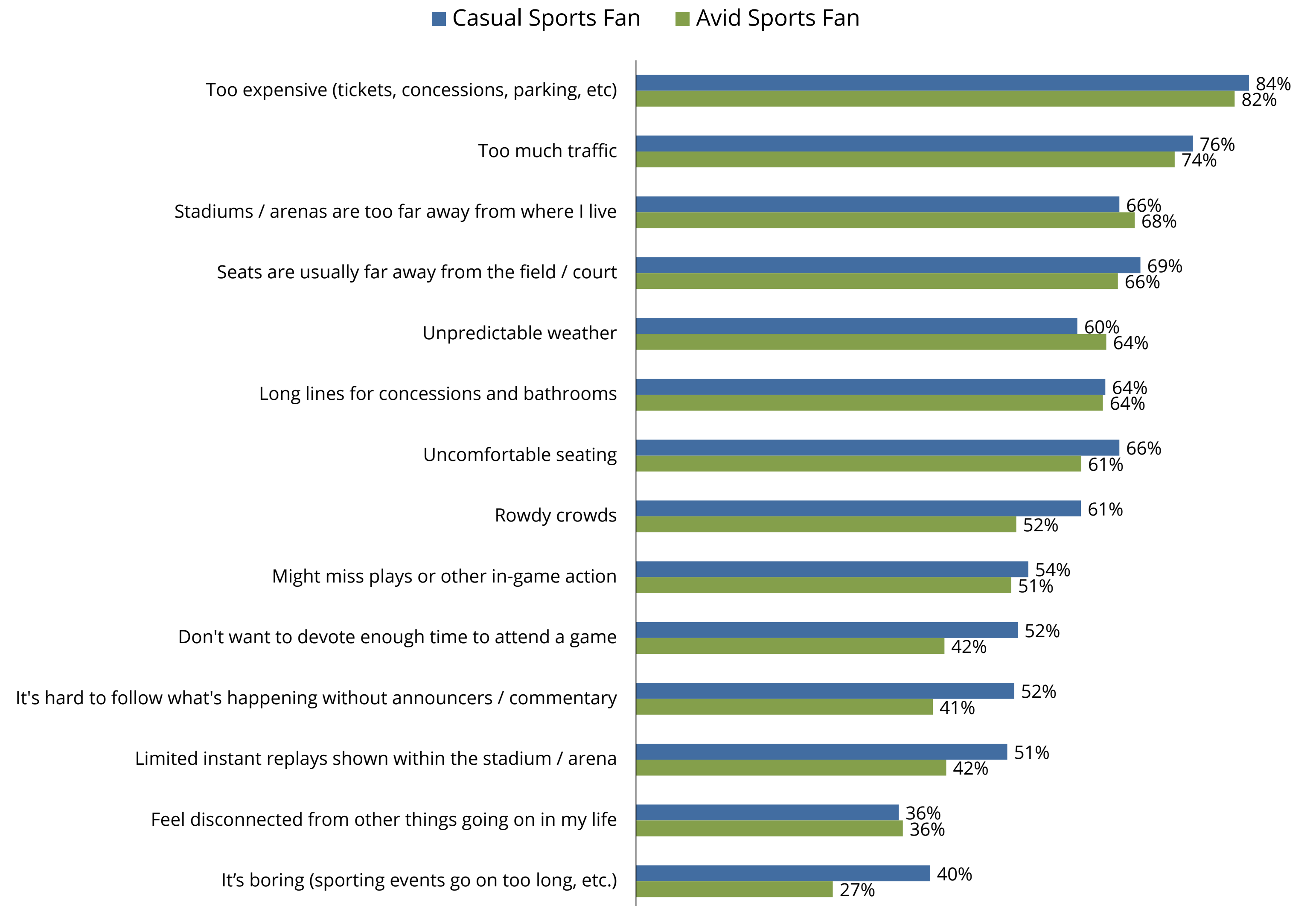
Even the most passionate fans may not attend events or attend fewer than they used to for a variety of reasons.

Among both the casual and avid fan, **cost** and hassles like **traffic**, **stadium distance** and **seat locations** are the biggest reasons.

Casual fans also find it **harder to follow** the action in person, they don't like **rowdy crowds** and they might **not want to devote** all the time needed during the day to attend a game.

Reasons That May Keep Fans From Attending Live Sports In Person

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). Sorted on Avid sports fans' %.

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Costs And Other Inconveniences Are Also The Main Reasons Why Other Audience Segments May Not Attend Sporting Events In Person

86% / 84%

of married & adults with kids sports fans say that **cost (too expensive)** may keep them from attending a sporting event

75%

of Hispanic sports fans say that their **seat location (too far from the field/court)** may keep them from attending a sporting event

72%

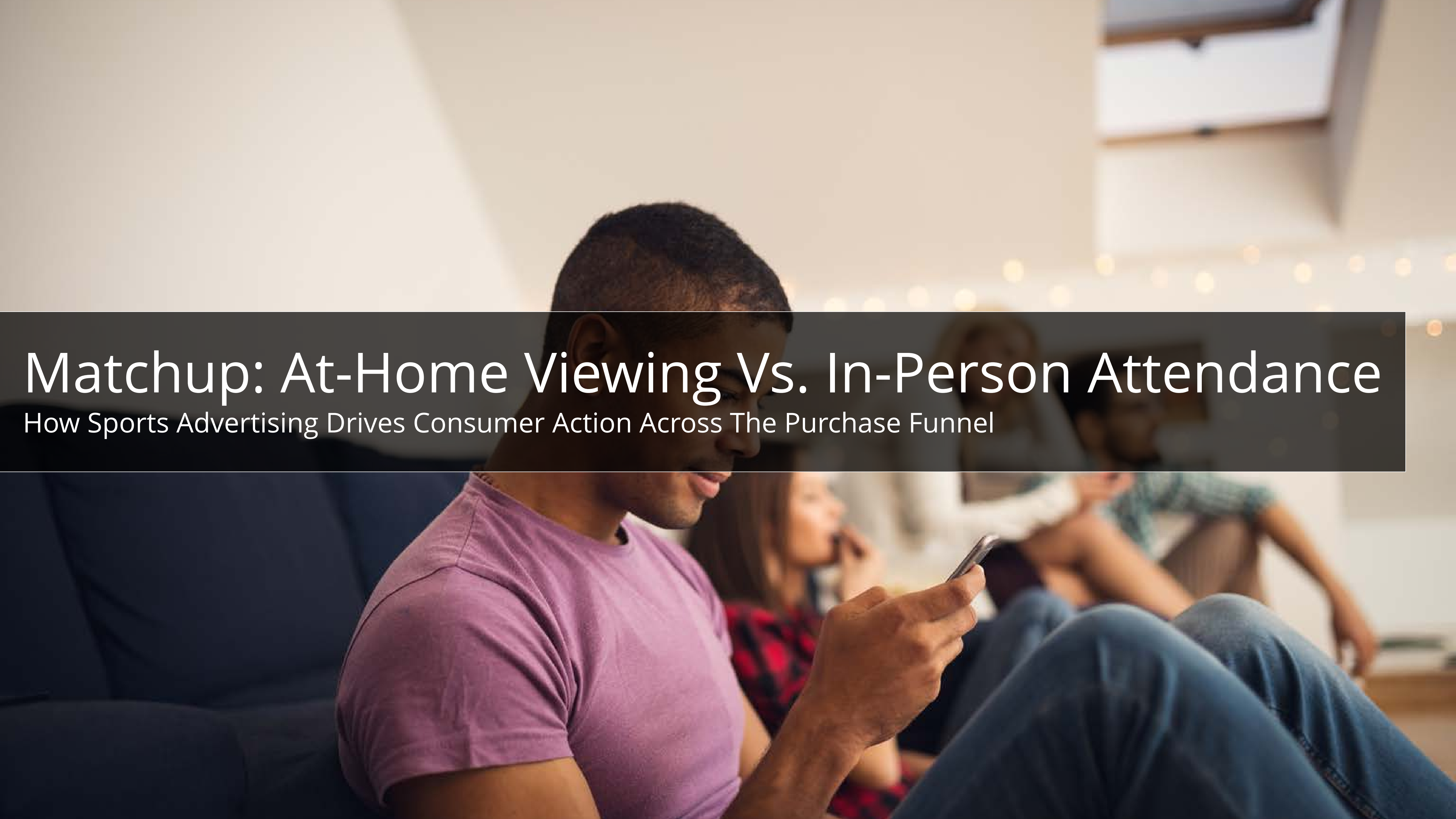
of Black sports fans say that **long lines for concessions and bathrooms** may keep them from attending a game

76% / 74%

of married & adults with kids sports fans cite **traffic** as a reason that may keep them from attending a game

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important).

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Matchup: At-Home Viewing Vs. In-Person Attendance


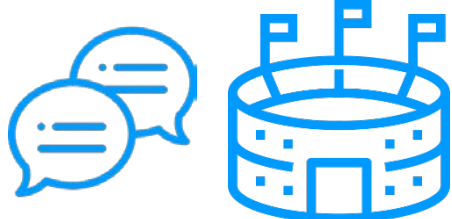
How Sports Advertising Drives Consumer Action Across The Purchase Funnel

The comfort, convenience and ease of connectivity during at-home viewing means that sports fans are more likely to engage with advertising and take consumer action than if they were at a game.

From an awareness & consideration perspective, avid sports fans are **56% more likely** to have talked with friends and/or family about an advertisement they saw while watching sports on TV than about an advertisement they saw in a stadium/arena; adults 18-34 and females are **60% and 53% more likely** to do the same, respectively.

Awareness & Consideration

% Of Sports Fans Who Have Done The Following...

	<u>All Sports Fans</u>	<u>Avid Fans</u>	<u>Adults 18-34</u>	<u>Females</u>
 <p>I have talked with friends and/or family about an advertisement I saw while watching sports on TV</p>	30%	34%	33%	35%
 <p>I have talked with friends and/or family about an advertisement I saw within a stadium/arena</p>	19%	21%	23%	23%

% Difference:
Sports TV Ads
vs.
In-Stadium Ads

+56%
more likely

+60%
more likely

+43%
more likely

+53%
more likely

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.


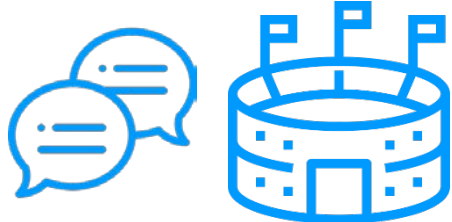
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Avid sports fans are **24% more likely** to have visited a website for a product they saw advertised while watching sports on TV than for a product they saw advertised within a stadium / arena; females are **26% more likely** to do the same.

Adults 18-34, who are almost always connected to their mobile devices, are just as likely to visit a brand's website regardless of where they saw an advertisement.

Consideration & Intent

% Of Sports Fans Who Have Done The Following...

	<u>All Sports Fans</u>	<u>Avid Fans</u>	<u>Adults 18-34</u>	<u>Females</u>
 <p>I have visited a website for a product that I saw advertised while watching sports on TV</p>	22%	26%	27%	23%
 <p>I have visited a website for a product that I saw advertised within a stadium/arena</p>	18%	21%	27%	18%

% Difference:
Sports TV Ads
vs.
In-Stadium Ads

+22%
more likely

+24%
more likely

+1%
more likely

+26%
more likely


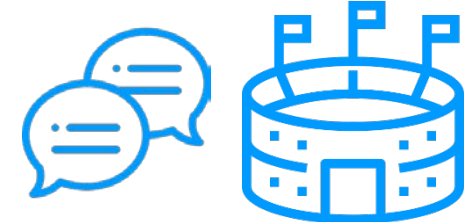
Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

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Avid sports fans are **40% more likely** to have purchased a product or service they saw advertised while watching sports on TV than a product or service they saw advertised within a stadium / arena; adults 18-34 and females are **9% and 32% more likely** to do the same, respectively

Sales

% Of Sports Fans Who Have Done The Following...

	<u>All Sports Fans</u>	<u>Avid Fans</u>	<u>Adults 18-34</u>	<u>Females</u>
 <p>I have purchased a product or service I saw advertised while watching sports on TV</p>	23%	26%	26%	24%
 <p>I have purchased a product or service I saw advertised within a stadium/arena</p>	17%	19%	24%	18%

% Difference:
Sports TV Ads
vs.
In-Stadium Ads

+32%
more likely

+40%
more likely

+9%
more likely

+32%
more likely

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

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Key Takeaways

With 96% of all fans typically watching sports at home, multiscreen TV is ubiquitous and offers broad reach among all ages, genders, races and levels of fandom.

Opportunities go well beyond Males 25-54 as approximately 45% of casual and moderate sports fans (and almost 40% of all sports fans) are female and one-third of Adults 18-34 watch sports through multiscreen TV daily.

In-stadium advertising and sponsorships is a good way to reach fans, especially avid fans since 43% typically go to sporting events, however these activations should be augmented by multiscreen TV in order to reach all fans, especially the more casual and moderate ones who collectively make up 57% of fans.

The passion surrounding sports satisfies several essential human needs and the fulfillment of comfort, convenience and ease of connection and connectivity during at-home viewing means that sports fans are more likely to engage with sports TV advertising than if they saw in-stadium ads.

Whether it's at a bar or restaurant, someone else's home, or at an airport or hotel, there is considerable out-of-home viewing for multiscreen TV content and marketers should ensure they're capturing this audience. In fact, 14% of casual fans prefer to watch sports at out-of-home locations.

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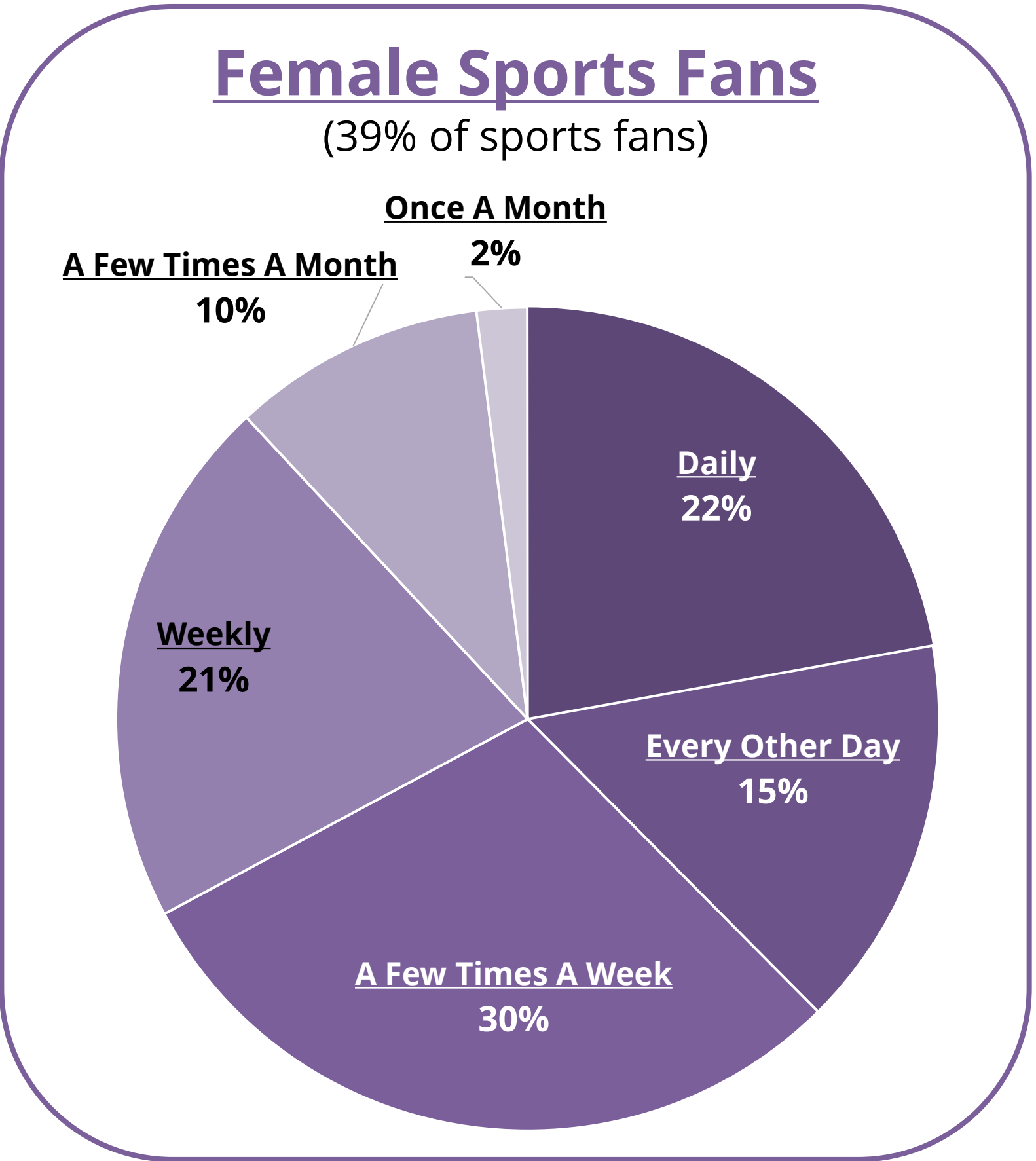
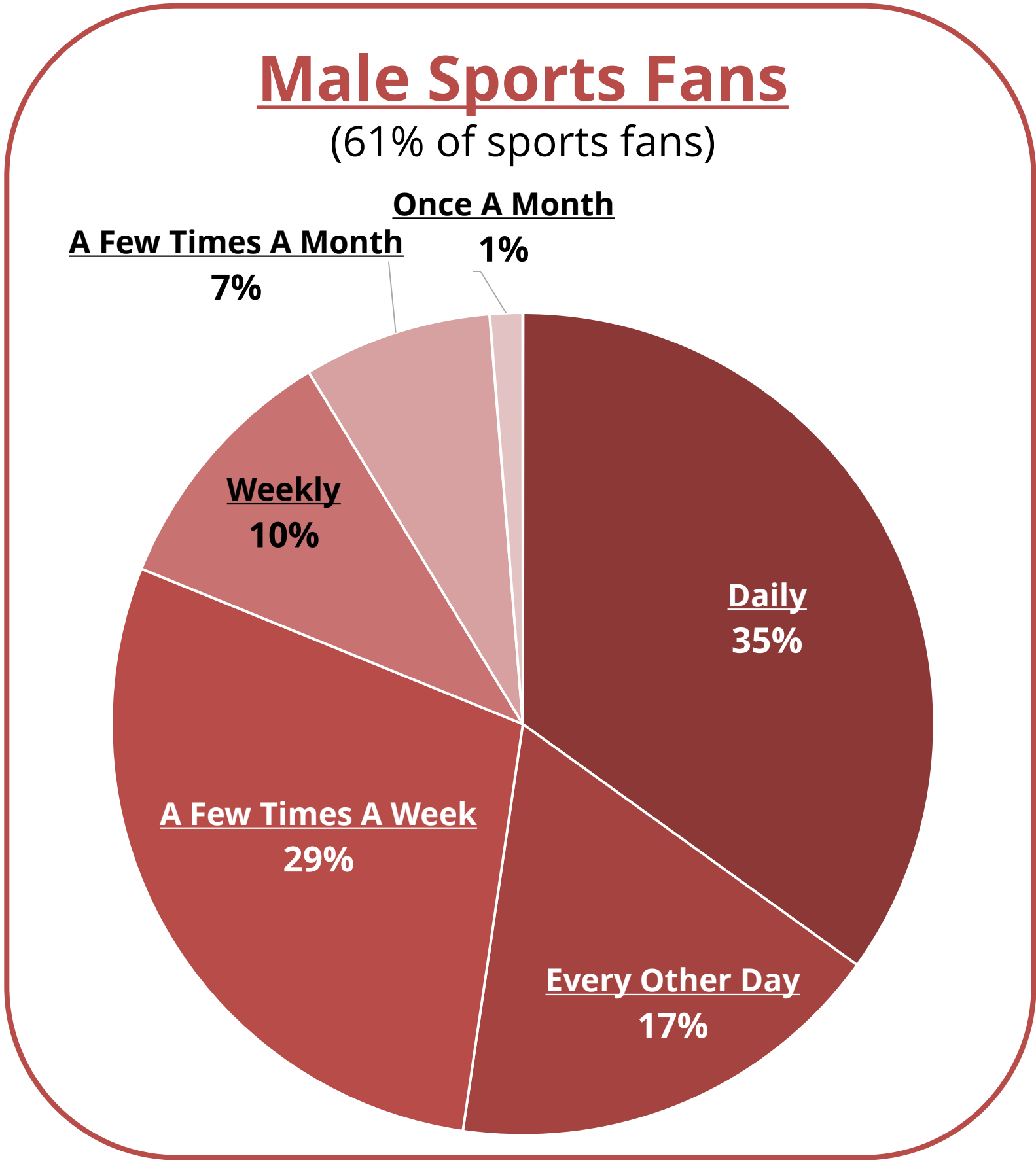
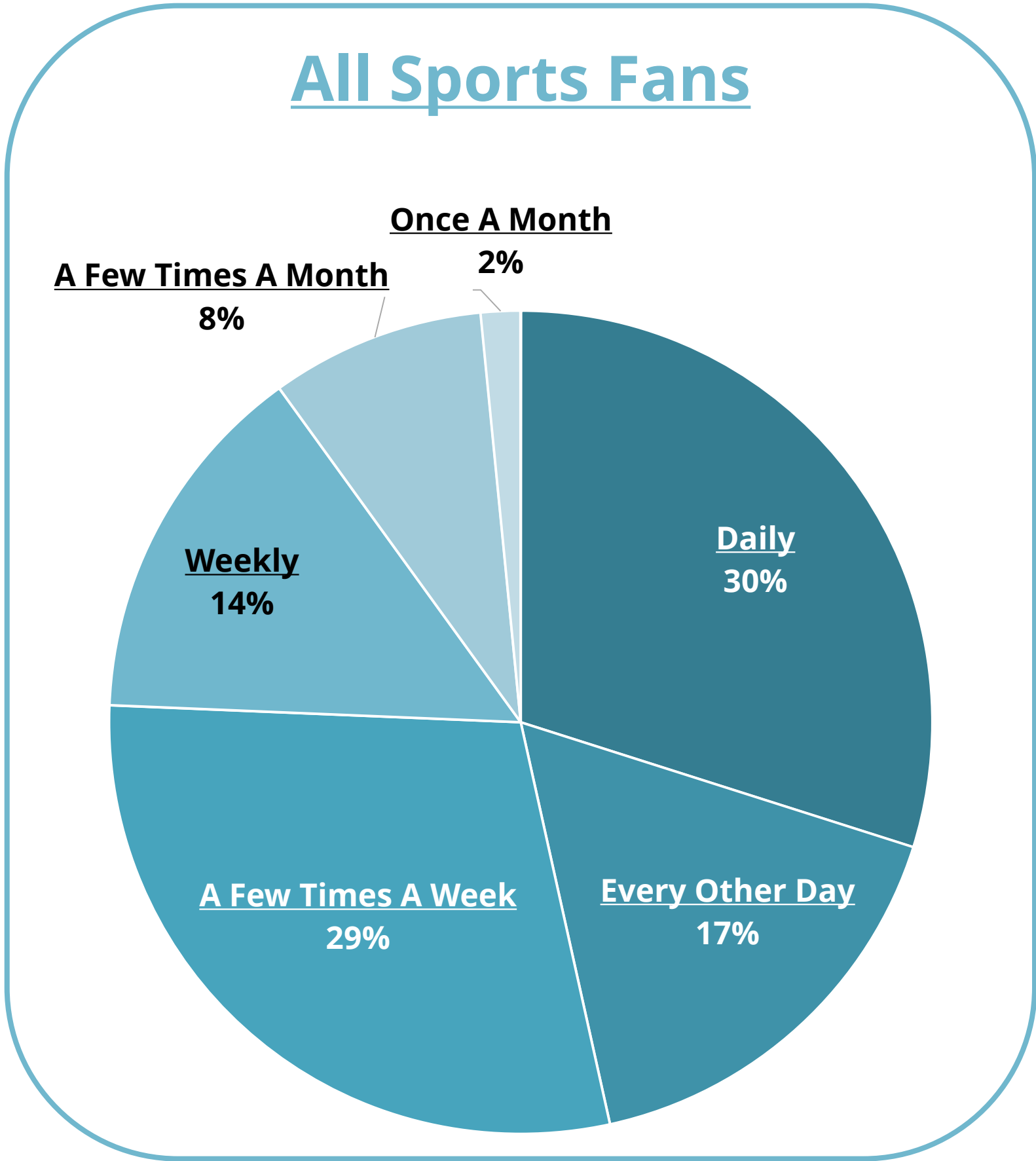
reedk@thevab.com



Appendix - Additional Sports Fan Insights: Gender & Age

From a Gender Perspective, Over 80% Of Male Fans And Two-Thirds Of Female Fans Watch Live Sports Across Devices At Least A Few Times A Week

How Often Do Sports Fans Watch Live Sports On TV*?



*TV is inclusive of all devices (i.e., TV, connected-TV device, smartphone, tablet, etc) and locations (i.e., at home, at a bar/restaurant, someone else's home, etc)

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019, Survey base: self-identified sports fans, P18+. Q S4: On average, how often do you watch live sports on TV in a given month? Please indicate any viewing that takes place regardless of device (i.e., TV, smartphone, tablet, etc) or location (i.e. at home, at a bar / restaurant, someone else's home, etc). All Sports Fans based on P18+.

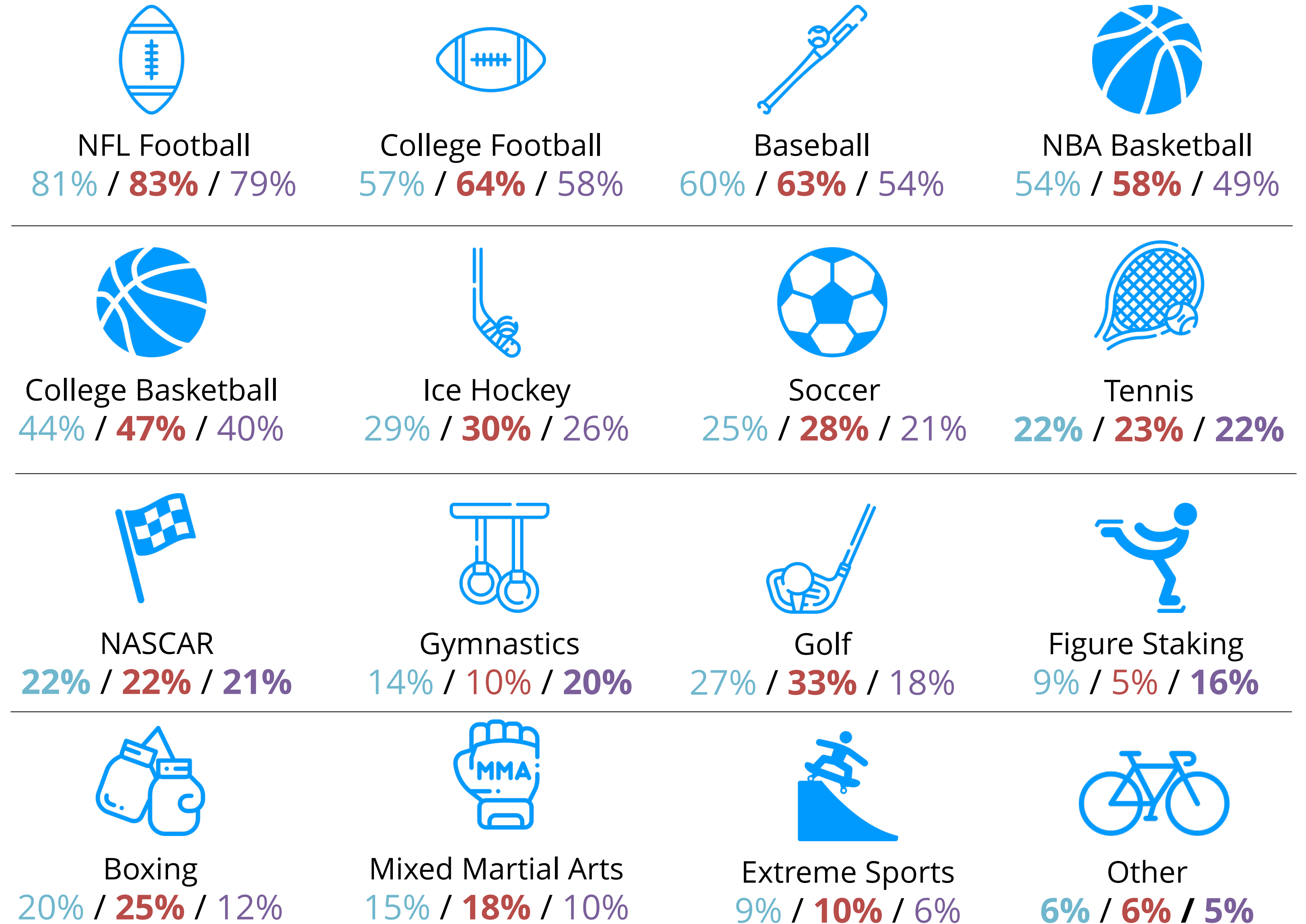
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The major sports like NFL, college football, MLB and NBA, attract both male and female fans, while more **niche sports** skew towards one gender.

For instance, sports like **golf, boxing, mixed martial arts** skew more towards **males** while sports like **gymnastics** and **figure skating** skew more towards **females**.

% of Sports Fans Who Follow Each Sport

All / Male / Female



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q8: Which sports do you follow?
 Note: Numbers don't add to 100% due to respondents ability to select more than one answer. All Sports Fans based on P18+. Sorted by female fans' %.

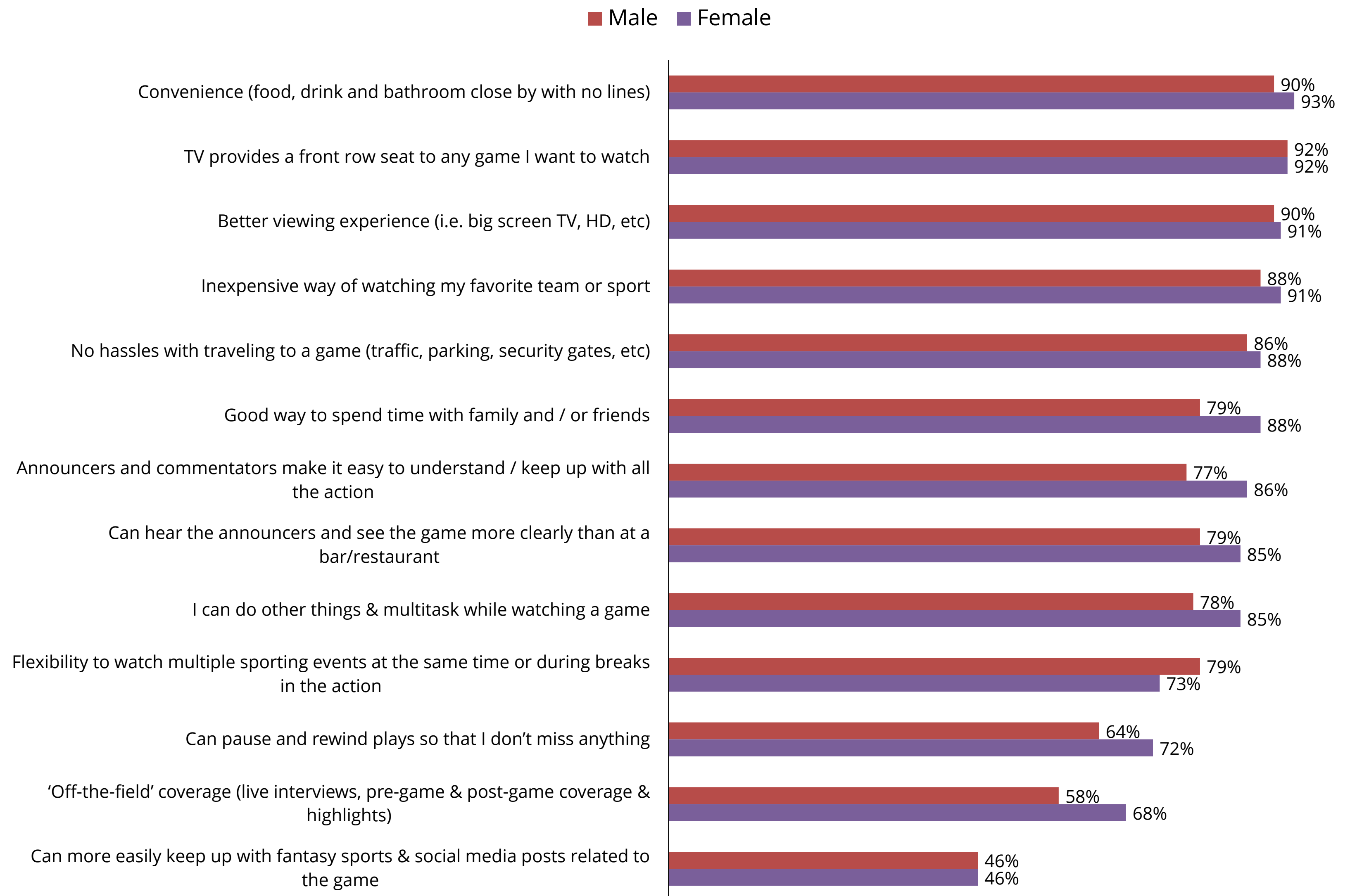
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There's not much of a difference between males and females when it comes to the main reasons they like to watch live sports at home – like many of the other audience segments, it's about **convenience, viewing experience** and **cost efficiency**.

Female fans are more likely to appreciate the **communal aspect** of sports viewing, ability to more **easily follow** the action on TV and the **'off-the-field' coverage** that includes interviews and human interest stories.

Main Reasons Why Fans Watch Live Sports At Home

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important. Based on respondents who prefer watching sports at home via Q11. Sorted on Female fans' %.

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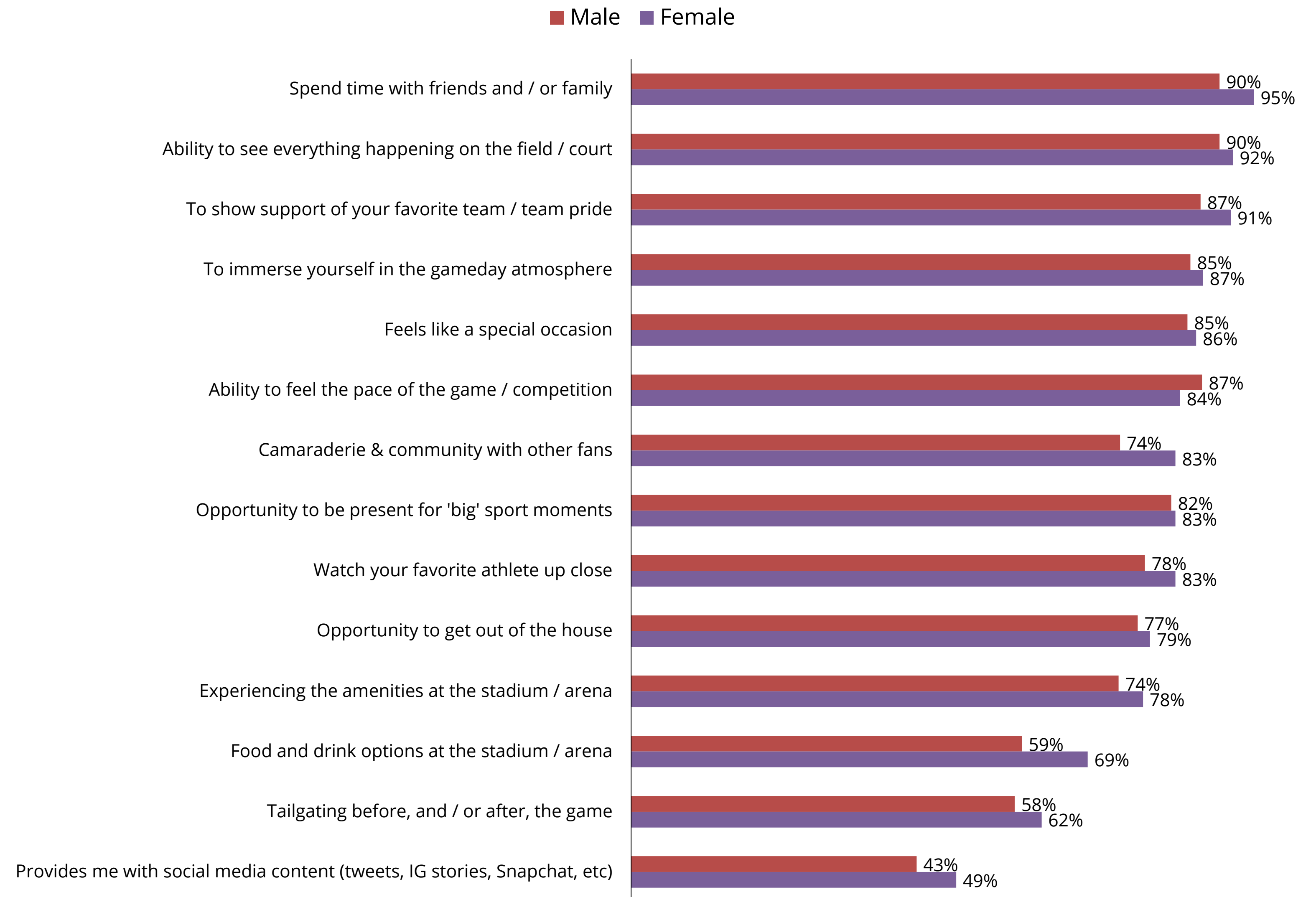
Male and female fans enjoy going to a live sporting event because they see it as an occasion to spend valuable time with their **friends & family**.

It also gives them the ability to **see everything** happening on the field and they can show off their **team pride**.

Female fans also like the **camaraderie & community** they feel with other fans and they're more likely to **share** these moments with their followers on **social media**.

Why Do Fans Attend Sporting Events In Person?

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q15: Please rate how important the following are in your decision to attend a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Based on respondents who have attended a professional or collegiate sports event in the past two years via Q14. Sorted on Female fans' %.

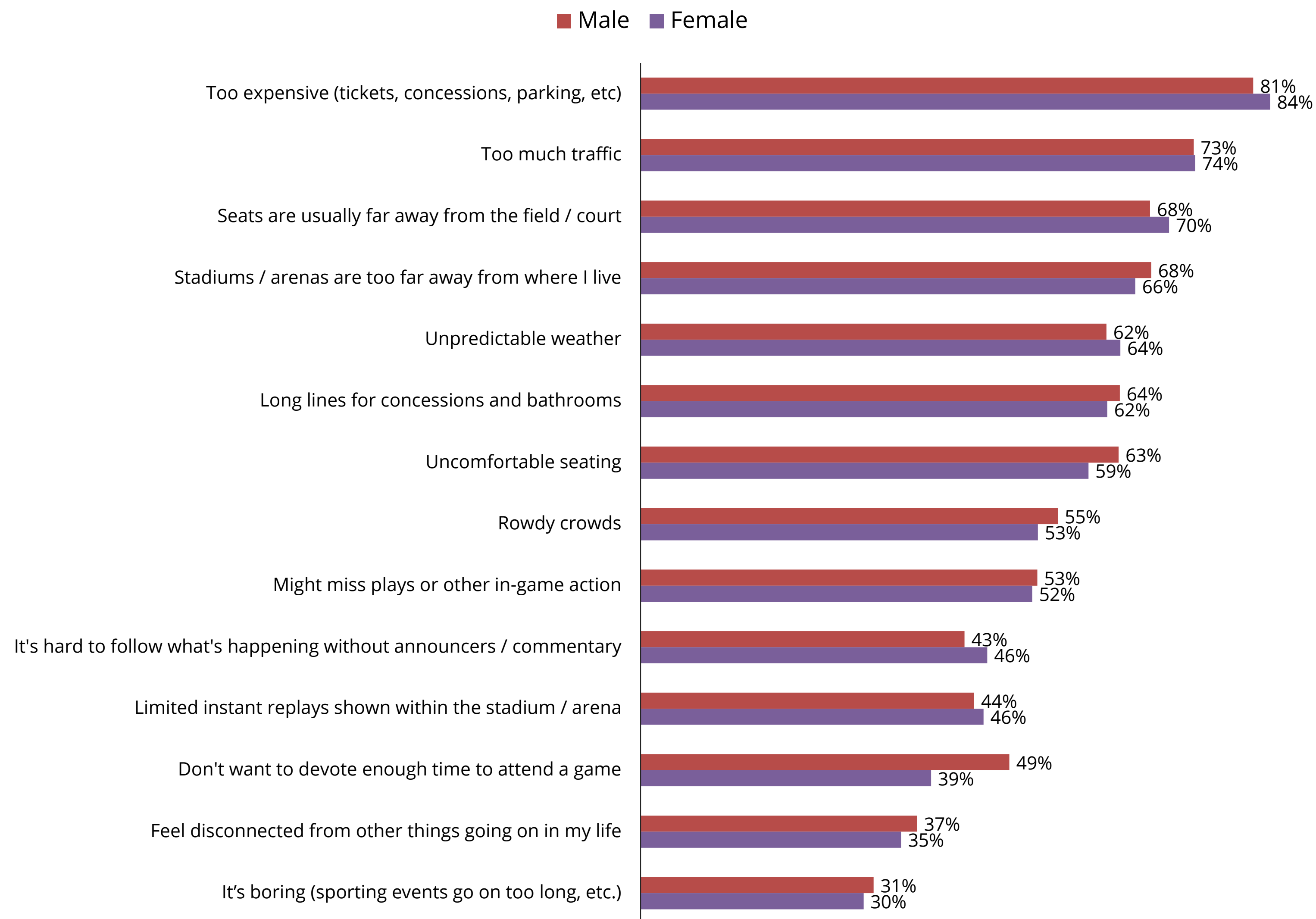
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Male and female fans typically cite the same reasons as to why they might not attend a sporting event with **cost** and inconveniences like **traffic**, **stadium distance** and **seat locations** as the biggest factors for both.

Interestingly, male sports fans are more likely to **not want to devote enough time** during the day to attend a game.

Reasons That May Keep Fans From Attending Live Sports In Person

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Sorted on Female fans' %.

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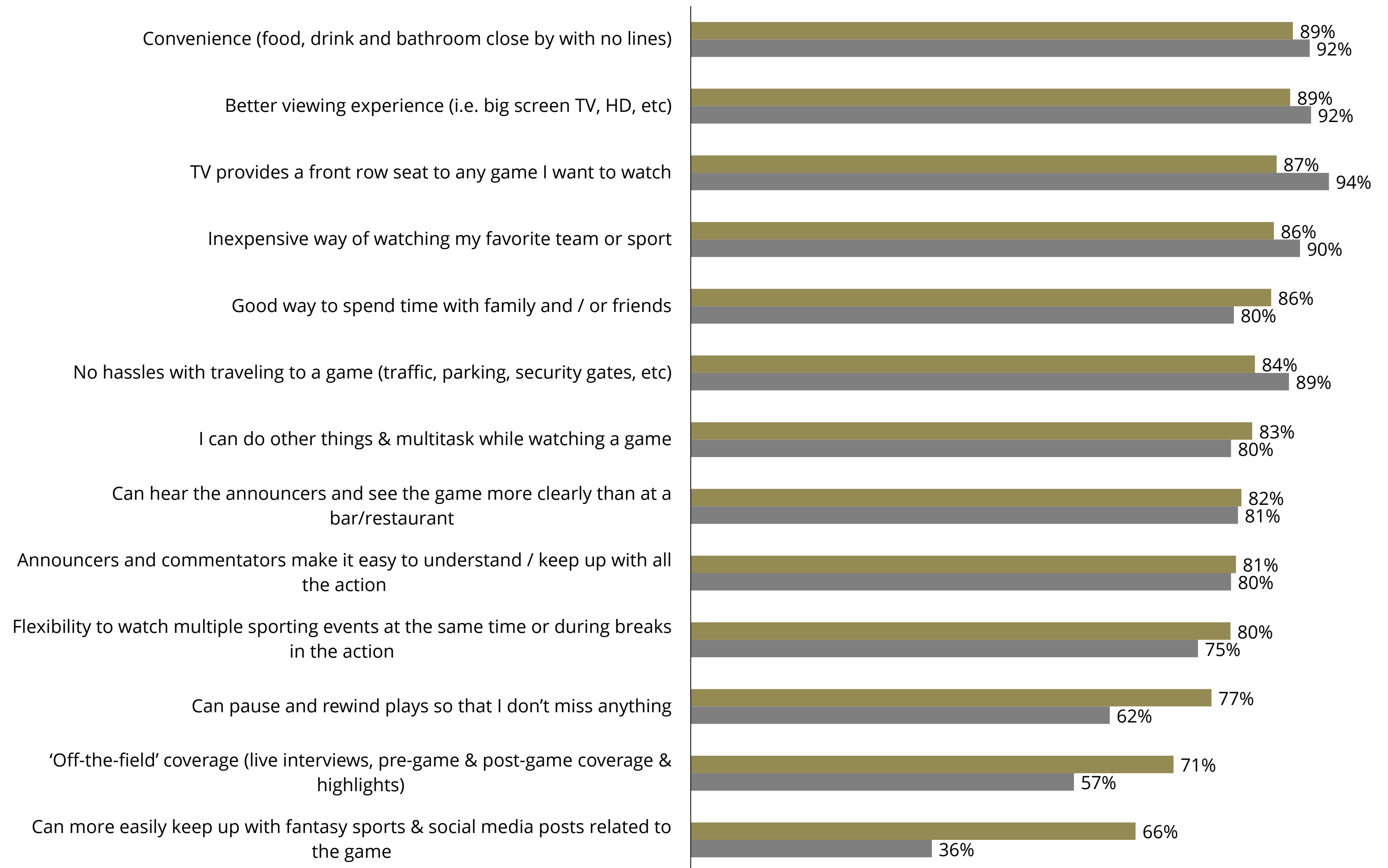
Both younger and older demos most appreciate the **convenience** and **viewing experience** of watching sports at home and the ability to have a **front row seat** for every live sporting event.

Adults 18-34 also like the **flexibility** to pause and rewind a game, the **comprehensive coverage** that TV networks provide and the **ability to easily keep up** with their fantasy teams and social media posts related to the games they're watching.

Main Reasons Why Fans Watch Live Sports At Home

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')

■ Adults 18-34 ■ Adults 35+



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important). Based on respondents who prefer watching sports at home via Q11. Sorted on Adults 18-34 fans' %.

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When it comes to in-person attendance, younger and older demos most appreciate the ability to **see everything** happening on the field and spending valuable time with their **friends & family** along with showing their **team pride & support**.

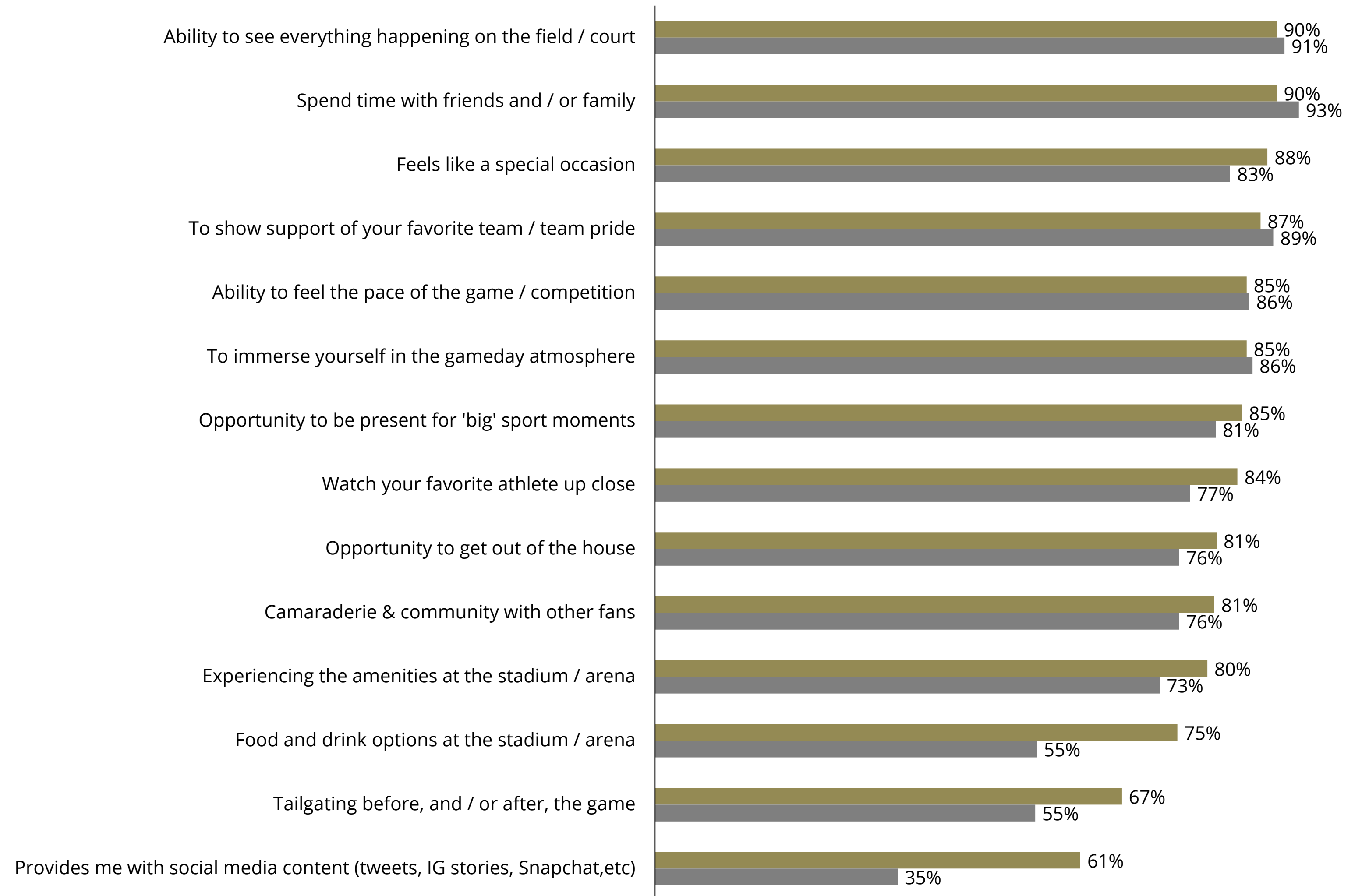
Adults 18-34 also like the **social aspect** of attending games which can meld the physical & digital world together – they're more likely to **tailgate** and post related **social media content**.

Separately, they're also more likely to appreciate the **unique food & drink options** available in-stadium.

Why Do Fans Attend Sporting Events In Person?

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')

■ Adults 18-34 ■ Adults 35+



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q15: Please rate how important the following are in your decision to attend a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Based on respondents who have attended a professional or collegiate sports event in the past two years via Q14. Sorted on Adults 18-34 fans' %.

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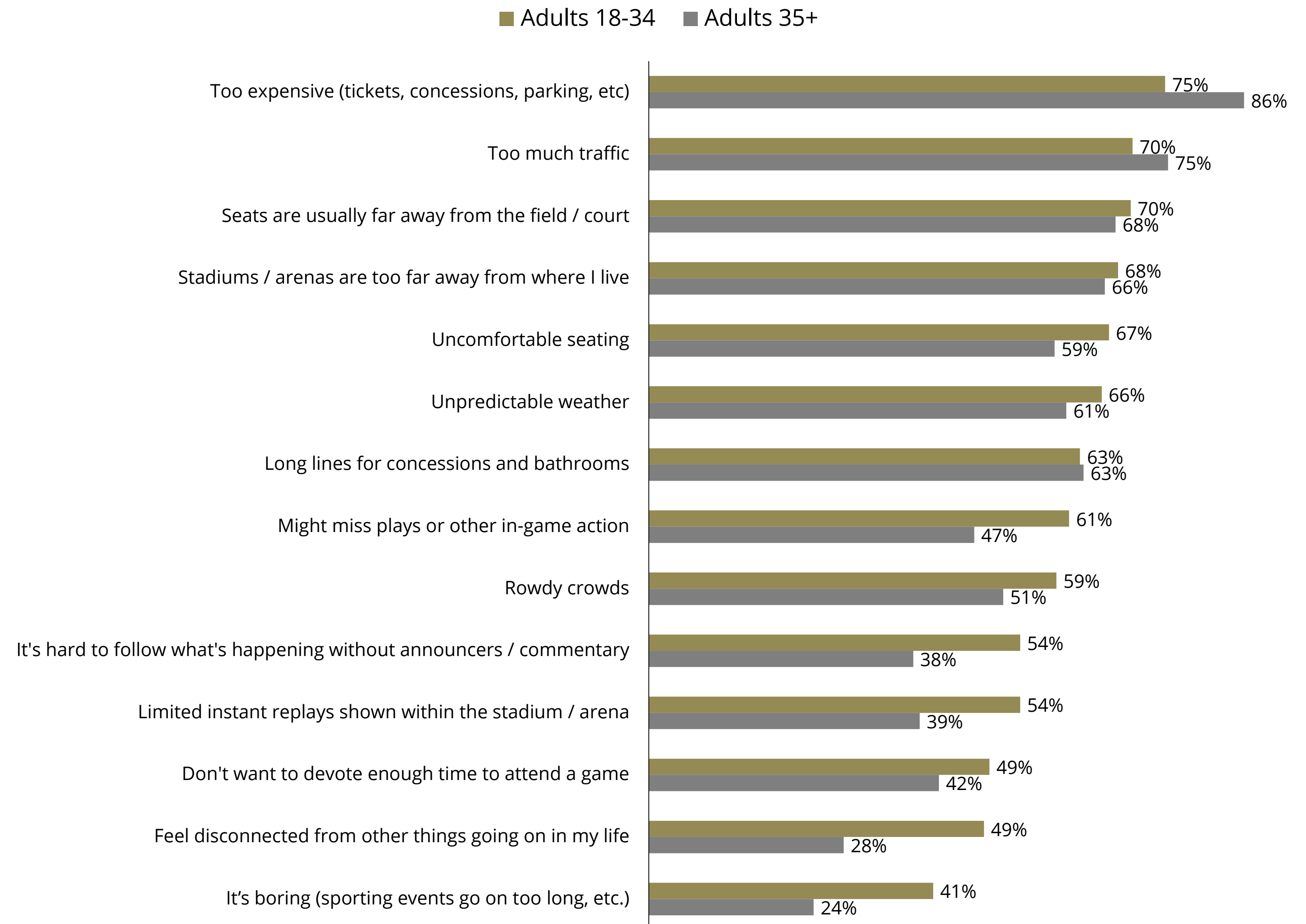
Older demographics are more likely to cite **cost** as a reason that they may not attend a sporting event in person along with the hassles that come with **too much traffic**.

Both younger and older demos have issues with **stadium distance** and **seat locations**.

Adults 18-34 generally have a lot more reasons why they don't attend games including **uncomfortable seats, rowdy crowds, hard to follow** the action in person and feeling **disconnected** from their lives.

Reasons That May Keep Fans From Attending Live Sports In Person

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Sorted on Adults 18-34 fans' %.

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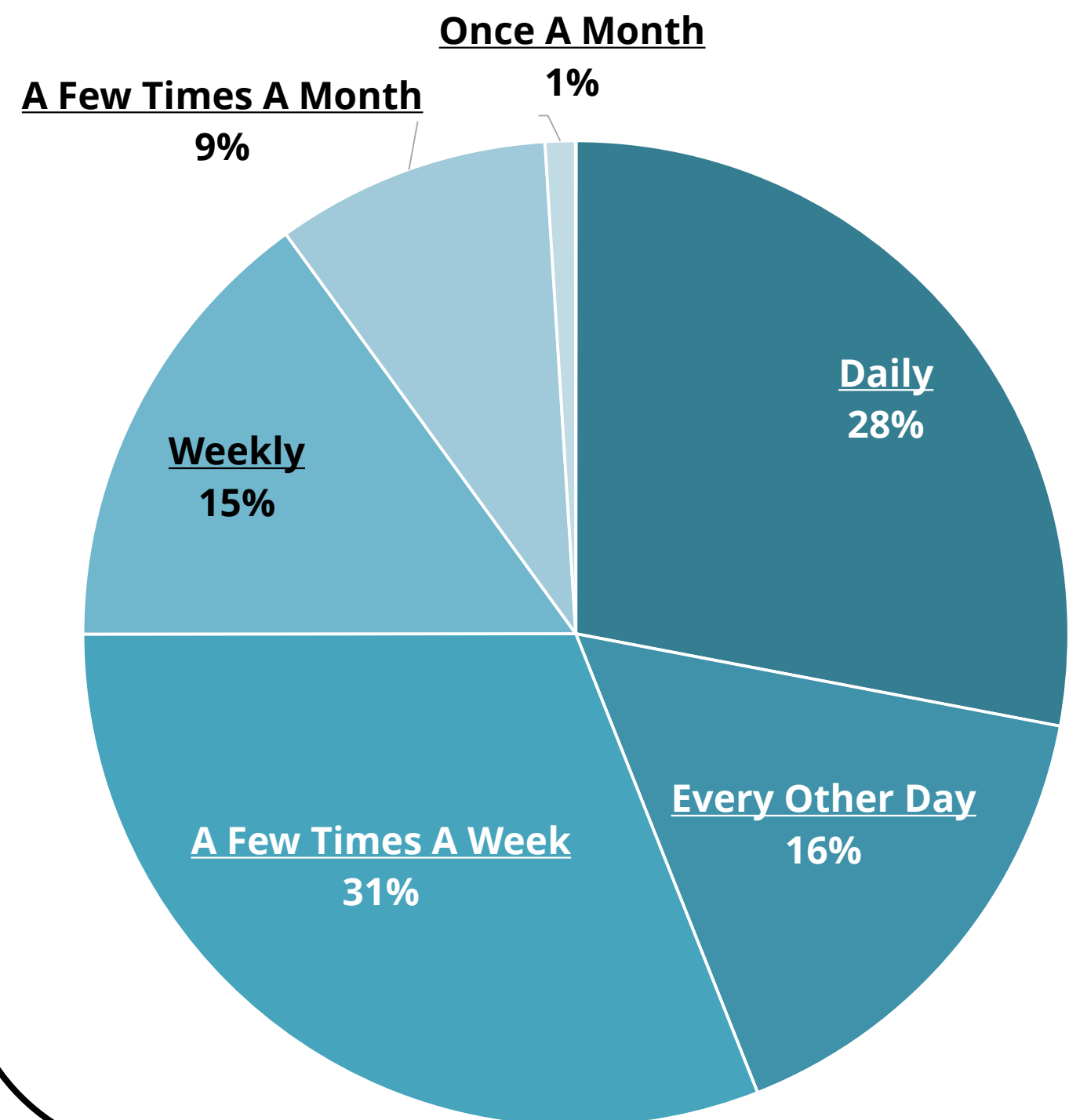


Members Exclusive: Additional Demo Cuts To The Survey

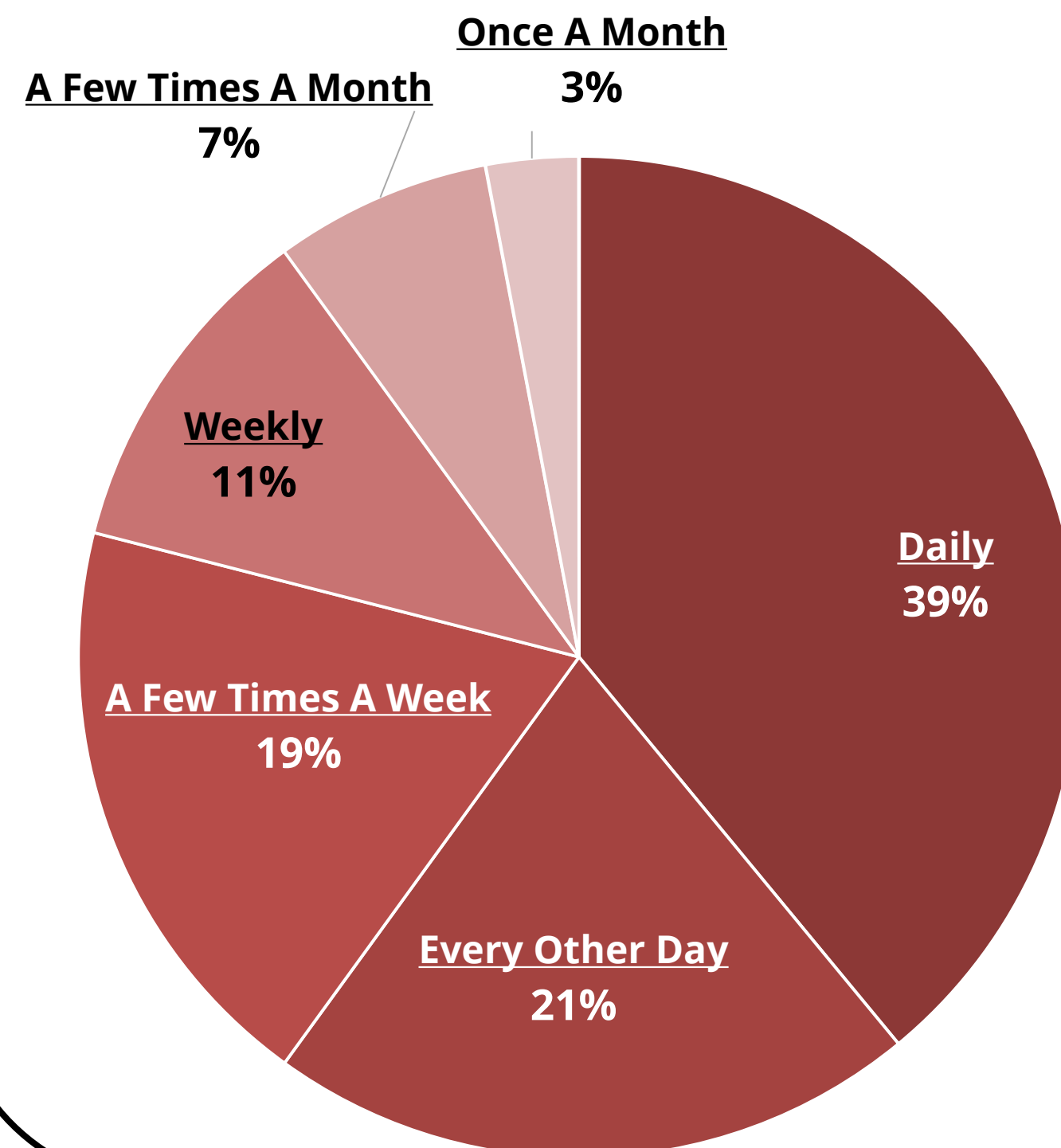
Multicultural Sports Fans Are Heavier Sports TV Viewers – 60% of Black Fans And 58% Of Hispanic Fans Watch Live Sports At Least Every Other Day

How Often Do Sports Fans Watch Live Sports On TV*?

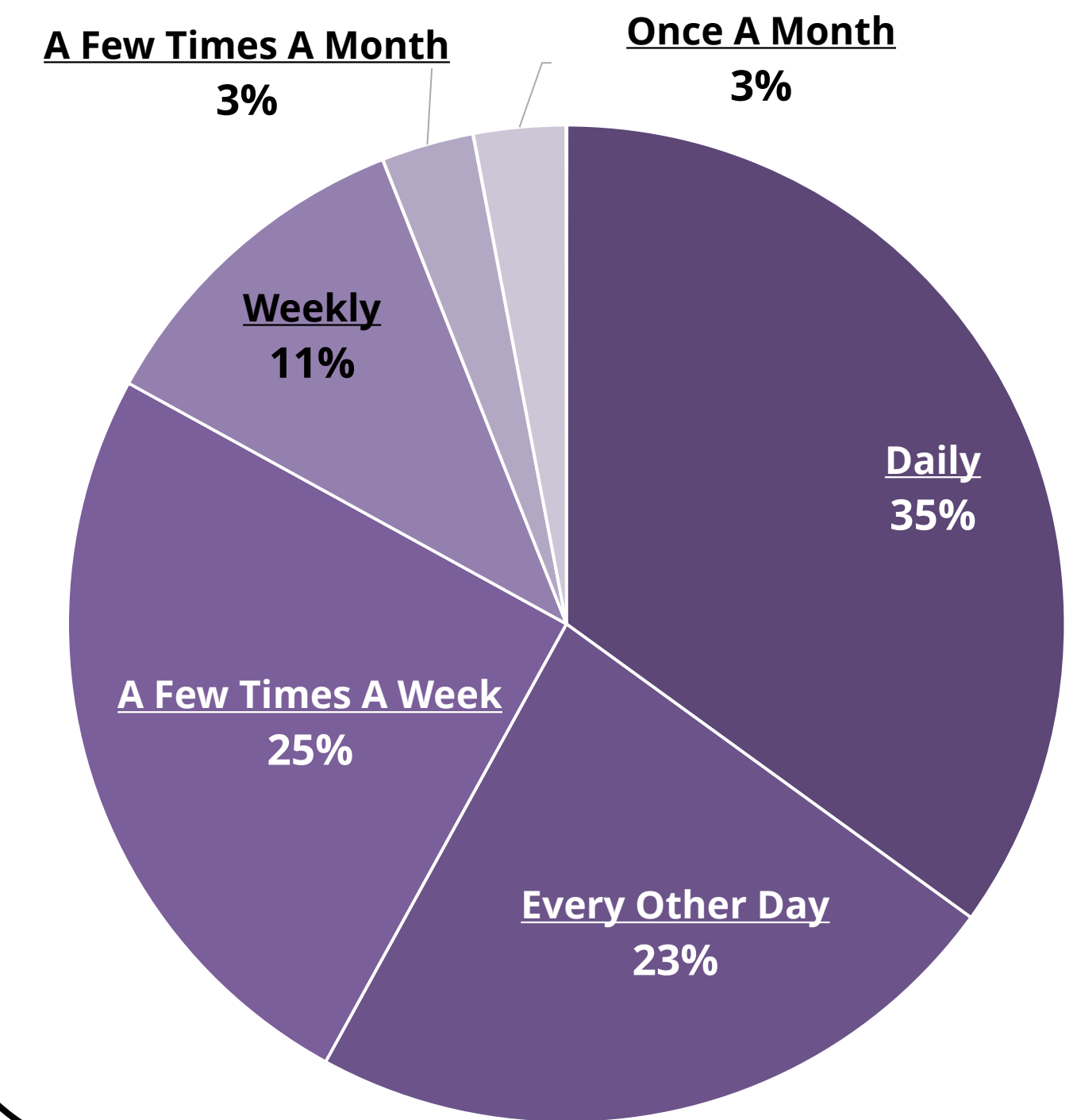
Non-Hispanic White Sports Fans



Black Sports Fans



Hispanic Sports Fans

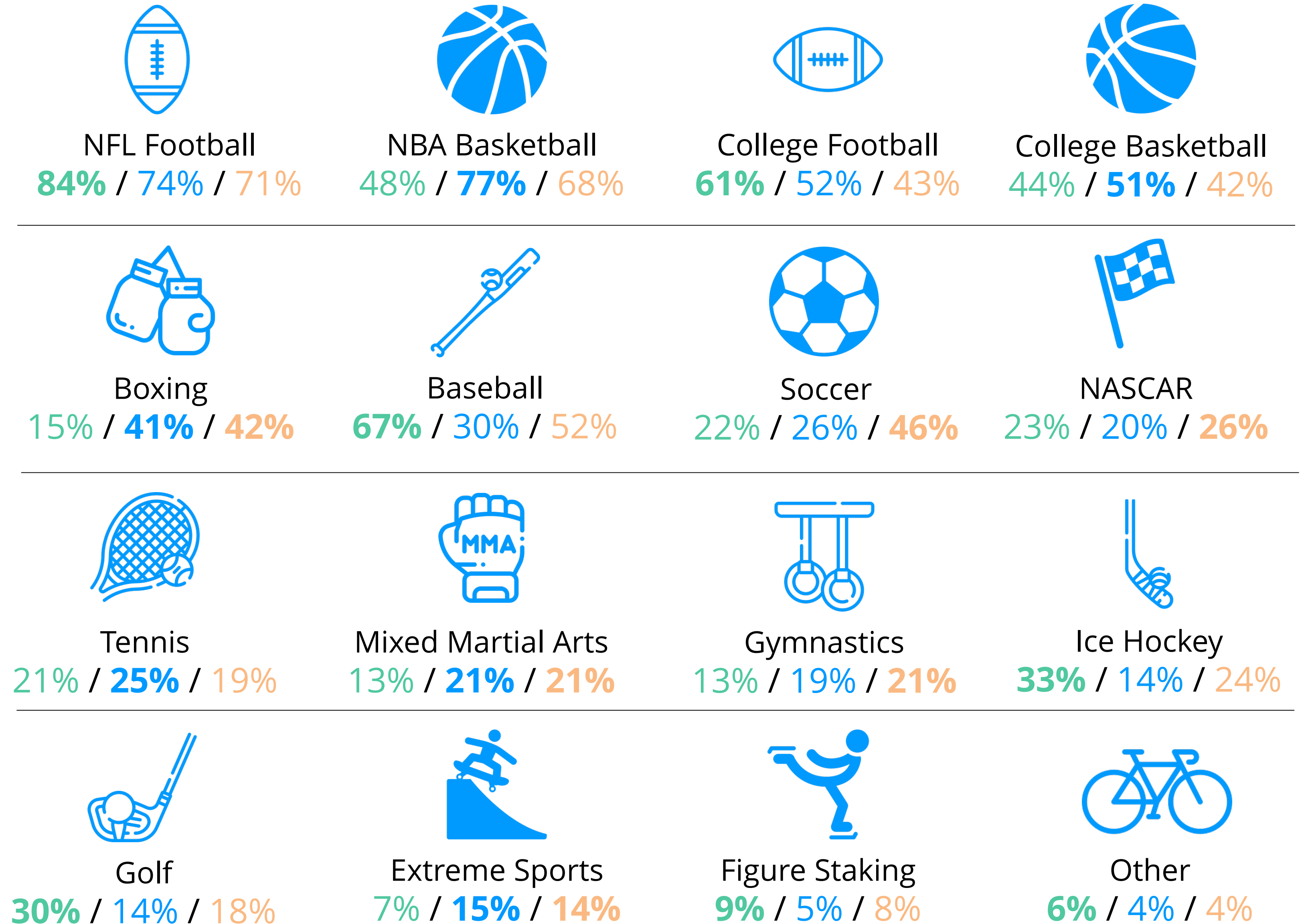


*TV is inclusive of all devices (i.e., TV, connected-TV device, smartphone, tablet, etc) and locations (i.e., at home, at a bar/restaurant, someone else's home, etc)

Black sports fans greatly over index against **basketball** and **Hispanics** over index against **soccer** while both groups over index against **extreme sports** and combat sports like **boxing** and **MMA**

% of Sports Fans Who Follow Each Sport

Non-Hispanic White / Black / Hispanic



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q8: Which sports do you follow? Note: Numbers don't add to 100% due to respondents ability to select more than one answer. All Sports Fans based on P18+. Sorted by the average of Black & Hispanic fans' %.

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Multicultural fans are more likely to enjoy watching sports at home because they can **more closely follow all of the action both on- and off-the-field**, whether it's the ability to pause and rewind plays or watch interviews and highlights.

They can also more easily keep up with related **social media posts** and their **fantasy teams** at home.

Hispanics, in particular, see watching sports at home as a good way to **spend time with friends and family**.

Main Reasons Why Fans Watch Live Sports At Home

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important). Based on respondents who prefer watching sports at home via Q11. Sorted on Non-Hispanic White fans' %.

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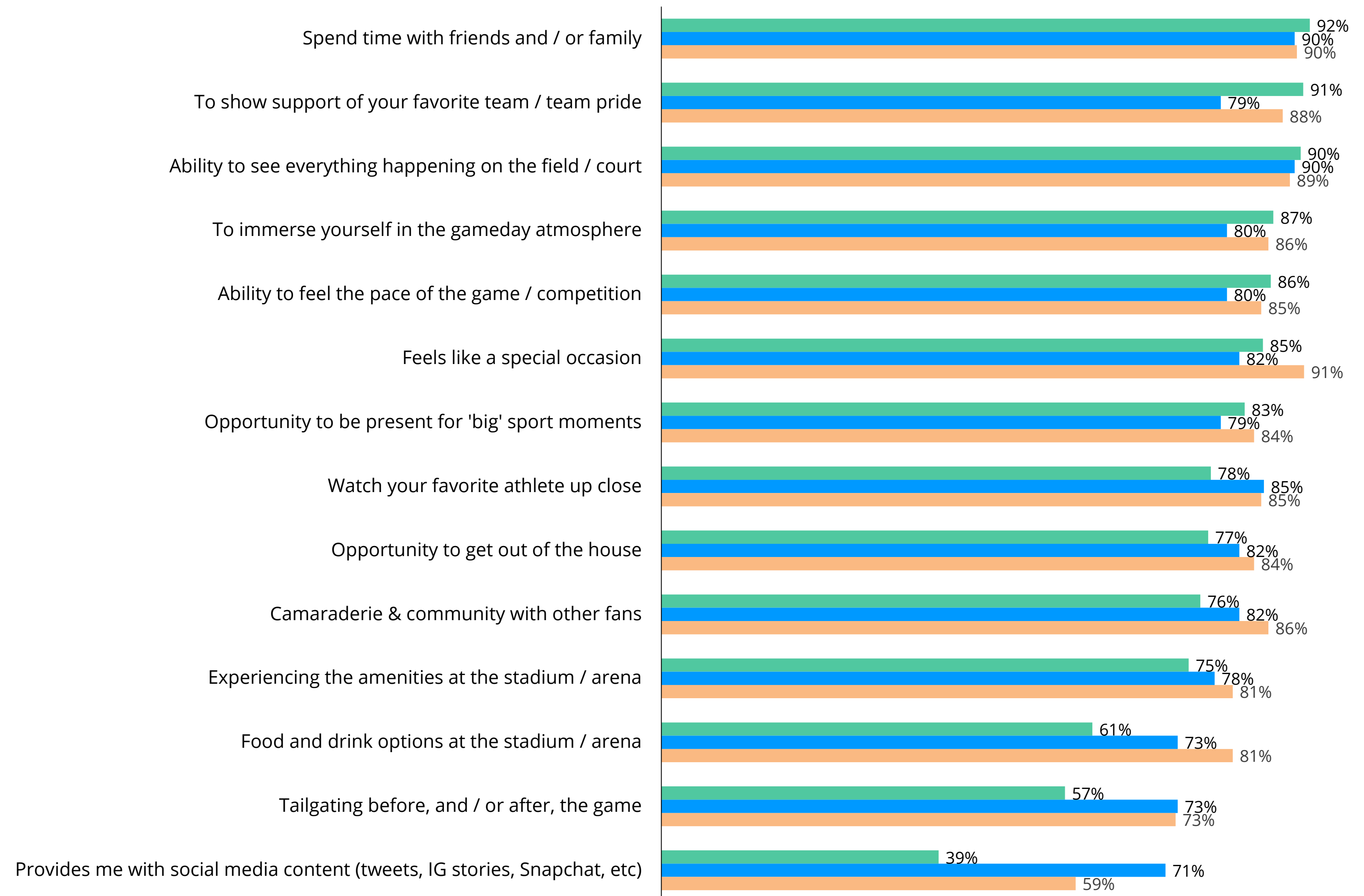
When it comes to attending sporting events in person, in addition to it being an opportunity to spend time with **family and friends**, multicultural fans are more likely to **tailgate** before and / or after the game and enjoy the **camaraderie** and **community** with other fans.

They are also more likely to appreciate the **unique food and drink options** available at stadiums.

Why Do Fans Attend Sporting Events In Person?

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')

■ Non-Hispanic White ■ Black ■ Hispanic



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+, Q15: Please rate how important the following are in your decision to attend a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Based on respondents who have attended a professional or collegiate sports event in the past two years via Q14. Sorted on Non-Hispanic White fans' %.

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Sports fans with children and those without children both like watching sports at home because of its **convenience** and **comfort**, the **better viewing experience** and the ability to have a **front row seat** to every game.

Not surprisingly, **fans with children** consider watching sports at home as a good way to **spend time with family** and it also allows them the **flexibility** to pause and rewind plays.

Main Reasons Why Fans Watch Live Sports At Home

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important). Based on respondents who prefer watching sports at home via Q11. Sorted on sports fans with children %.

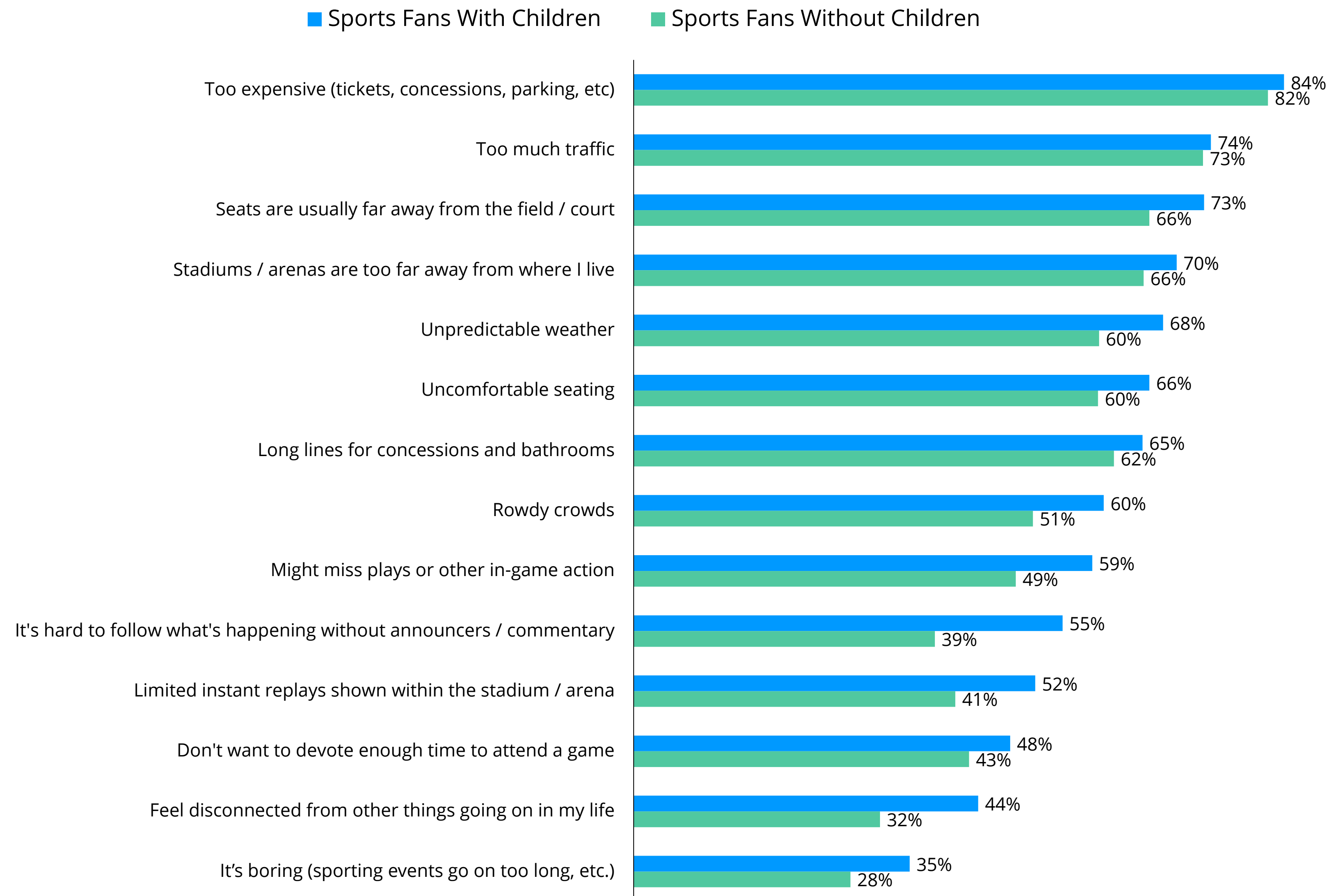
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When it comes to the main reasons that may keep fans from attending a live sporting event, sports fans with children and those without children both cite **cost** as the biggest factor while **inconveniences** like **traffic**, **stadium distance** and **seat location** rank high as well.

Sports fans with children are more concerned about **missing plays** and following all the action by being there in-person. They're also more likely to feel **disconnected** from other things in their life while they're at a stadium.

Reasons That May Keep Fans From Attending Live Sports In Person

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Sorted on sports fans with children %.

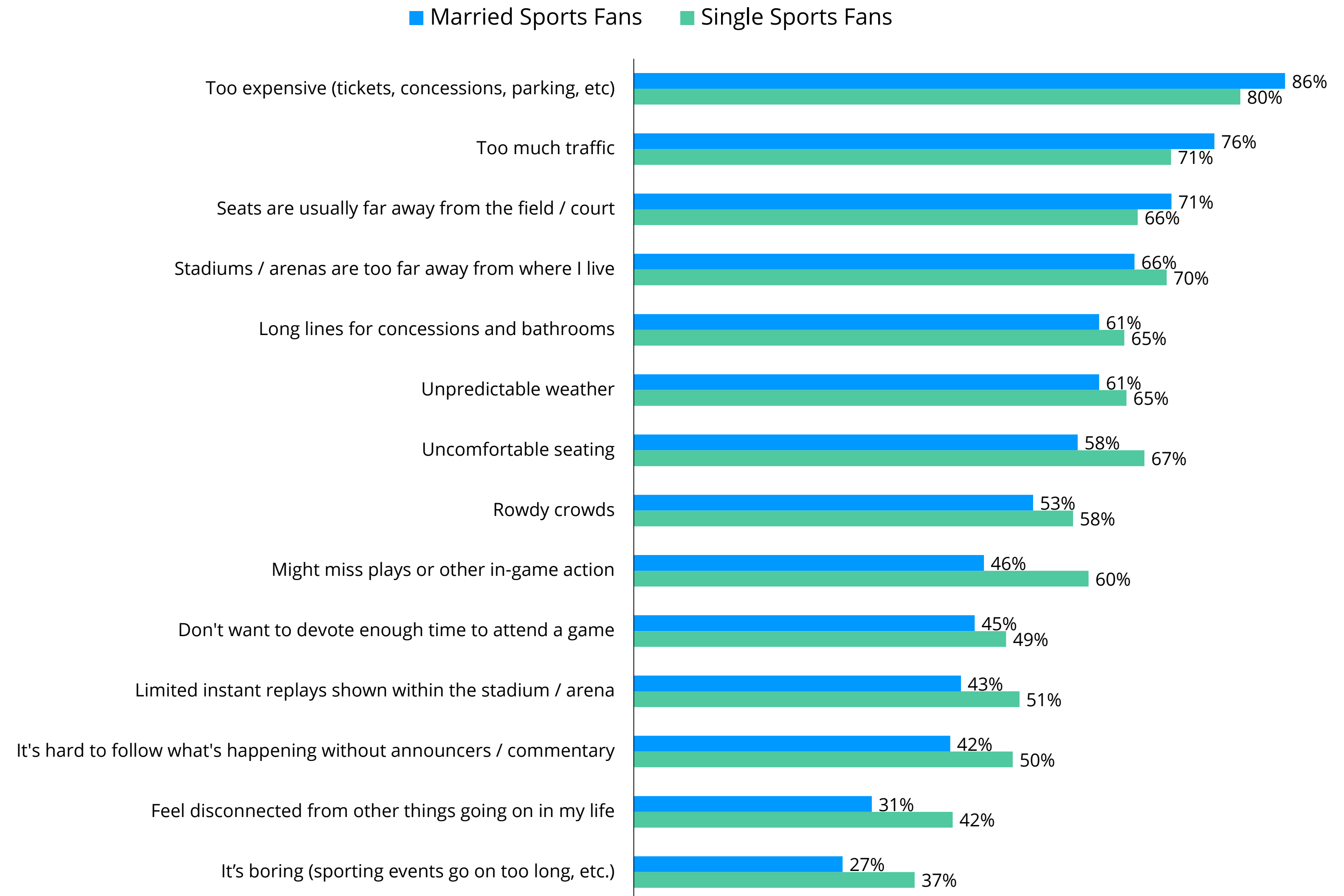
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When it comes to the main reasons that may keep fans from attending a live sporting event, both married and single sports fan cite **cost** as the biggest factor while **inconveniences** like **traffic**, **stadium distance** and **seat location** rank high as well.

Single sports fans are more concerned about **missing plays** and following all the action by being there in-person. They're also more likely to feel **disconnected** from other things while they're at a stadium.

Reasons That May Keep Fans From Attending Live Sports In Person

Top 2 Box (% that rate statement as 'Very Important / Somewhat Important')



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q16: Please rate the reasons that may keep you from attending a sporting event in person (Top 2 Box: Somewhat Important & Very Important). Sorted on Married sports fans' %.

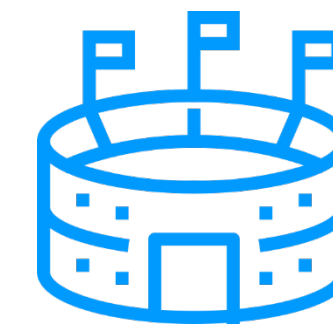
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Regardless of where they live, almost all sports fans watch live sports at home. **Fans that live in major metro areas watch sports anywhere** – they're more likely to attend sporting events in person and watch a game at a bar / restaurant, at someone else's home or at another 'out-of-home' location

Where Do Sports Fans Typically Watch Sports?



Home



Stadium or Arena



Bar or Restaurant



Someone Else's Home



Elsewhere
(airport, gym, hotel, etc.)

Sports Fan Type

	<u>Home</u>	<u>Stadium or Arena</u>	<u>Bar or Restaurant</u>	<u>Someone Else's Home</u>	<u>Elsewhere</u> (airport, gym, hotel, etc.)
Rural	95%	23%	22%	22%	4%
Suburban	96%	32%	30%	27%	7%
Urban	96%	36%	37%	35%	10%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base: self-identified sports fans, P18+. Q10: Where do you typically watch sports? All Sports Fans based on P18+. Note: Numbers don't add to 100% due to respondents ability to select more than one answer.