# YouGov<sup>®</sup>Sport

# Covid-19 & the recovery of Australian sport 2021

sport.yougov.com

**MARCH 2021** 

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# Introduction

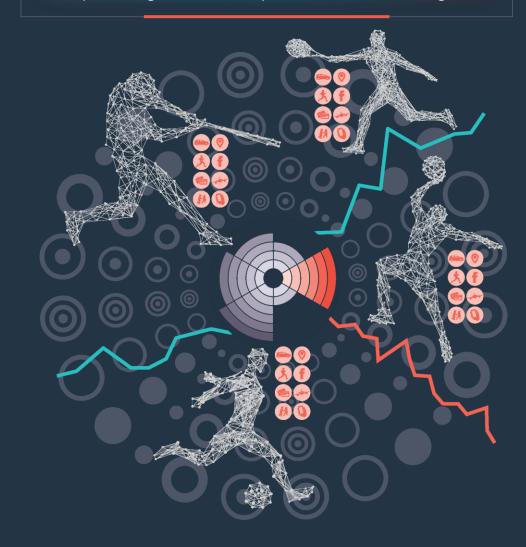
#### 2020 was a challenging year for both global and Australian sport, however rather than dwell on the past, let's look forward to how sport will recover in 2021.

At YouGov Sport, we are pleased to offer a helping hand in this regard.

As the sports and entertainment specialist arm of YouGov, we ask Australians every day about their views, attitudes and behaviours around sport, on specific teams and leagues and – since the outbreak of COVID-19 – about sports fans' views on that too.

And we're happy to share some of our insights with you in the shape of this special report.

The business of sport is no longer a guessing game. Our syndicated data tools are used by our clients who want stay ahead of the competition in both strategic planning and brand/performance tracking.



#### The impact of Covid-19 on Australian sport

#### SOME UNPRECIDENTED CHALLENGES

- No games, no crowds and amended fixtures for large parts of 2020 across all major Australian sports.
- Australian Grand Prix cancelled hours before first practice session.
- Loss in revenues felt at all levels of sport with all major rights holders and clubs standing down staff and cutting back on all expenditure on and off the field.
- **5 day state-wide lockdown** during 2021 Australian Open.

#### BUT THE AUSTRALIAN FANS APPETITE FOR SPORT WAS UNWAVERED

- > 2020 State of Origin Game III, Suncorp Stadium largest attendance at any live sport around the world at that point in time since Covid-19 outbreak.
- > The first ever night time AFL Grand Final gave Seven Network their **highest ever prime time network share**.
- Kayo grew by 78% compared to previous year with 624,000 paying customers as of the end of calendar year 2020.
- > Kyrgios vs Theim at the 2021 Australian Open was the largest non-news event of the year at the time with an audience of 1.8m.



# **Executive summary**



# Australian sport looking at strong recovery



#### Sport matters for quality of life

**62% of sports fans** said that watching or attending live sport is important to their quality of life.

#### Interest in sport remains strong

**Only 9% of sports fans** said their overall interest in sport has declined due to Covid-19.

#### Sports fans are optimistic

**93% of sports fans** believe sports will come back the same or stronger than it was before Covid-19.

Majority likely to attend live sport 56% of sports fans said that they are likely to attend live sport this year.



#### Majority comfortable attending

**64% of sports fans** said they would be comfortable attending live sport and sitting inside a stadium.



#### Live attendance will bounce back

**Only 12% of sports fans** said they are going to attend less live sport post covid-19. 75% will attend the same amount or more.



#### Sport handled Covid-19 well

**57% of sports fans** said that the sports industry as a whole handled Covid-19 well. The BBL, V8 Supercars and NRL were rated as the best at handling Covid-19.

#### 1 in 3 to support club membership

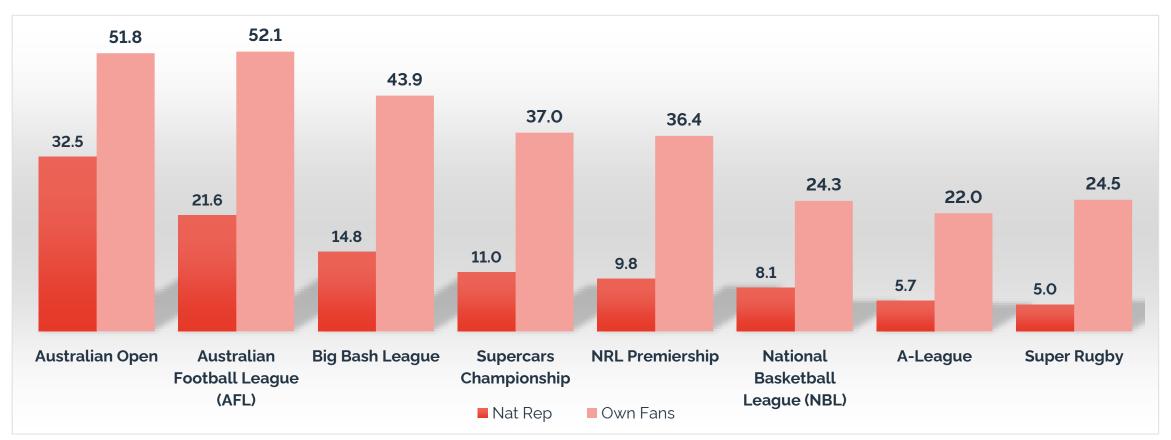
**32% of sports fans** said that when Covid-19 ends they will be more likely to take out a membership of their favourite team to show support.

# Australian sports fans & Covid-19



### Brand health across key Australian leagues/events

Across the last 12 months the Australian Open, AFL and BBL have had the strongest brand health amongst the general Australian population. When evaluated amongst own fans the AFL leads (52.1pts).



Source: YouGov Sports Brand Index. Dataset: 04/03/2020 – 03/03/2021

Definition: Nat Rep & League Own Fans (Top interest OR Somewhat interest)

Sample: Nat Rep sample ranges n=6,238-6,392, Fan sample ranges n=956-2,020.

Brand Health is an average of Impression, Reputation, Recommend, Value, Quality and Satisfaction\*

#### Sport important for quality of life

% of Australian Sports Fans that indicated that sport was important for quality of life

# 79%

62%

44%

Avid Sports Fans

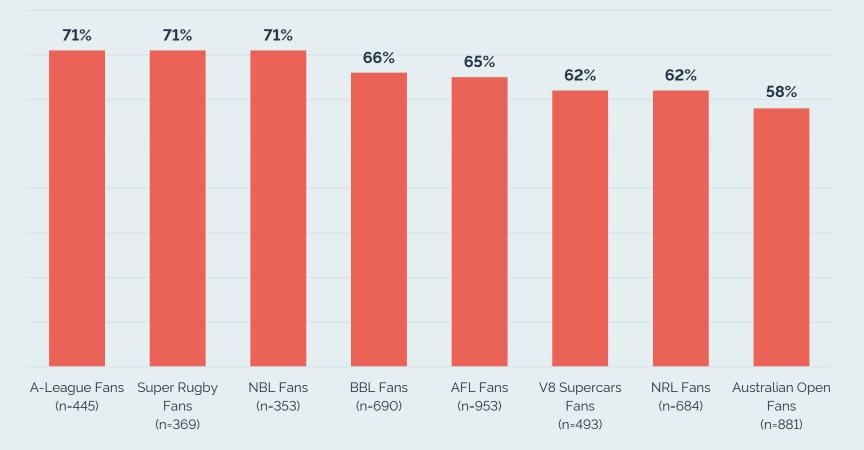
Core Sports Fans (n=1,234) General Sports Fans

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YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021. Q: How important, if at all, is watching or attending live sporting events to your overall quality of life?

### Sport important for quality of life

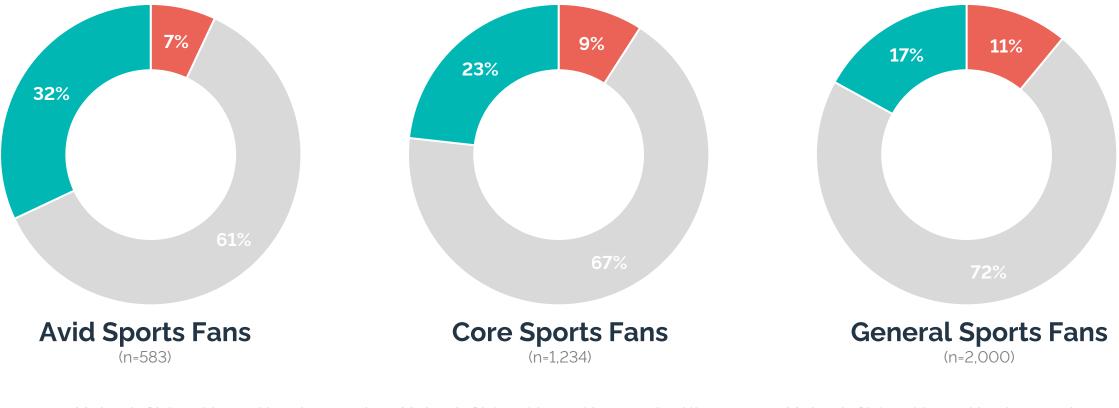
Watching or attending sport for one's quality of life rated highest for A-League, Super Rugby and NBL fans (71%).



#### % Fans said important

## **Interest in sport during Covid-19**

Across key sports fan segments, overall declines in general sports interest were very minimal. For avid fans almost 1 in 3 said that their overall interest in sport had increased as a result of Covid-19.



My level of interest in sport has decreased

My level of interest in sport has remained the same
My level of interest in sport has increased

## **Interest in sport during Covid-19**

Across key sports fan groups in Australia only a small minority said their overall interest in sport has declined due to Covid-19.

Across all Australian major sports leagues the majority of fans said their interest remained unchanged or had increased.

23% 25% 25% 25% 28% 36% 36% 35% 66% 64% 66% 67% 63% 58% 57% 57% 11% 10% 9% 9% 8% 7% 7% 7% **NBL** Fans NRL Fans AFL Fans A-League Fans Super Rugby V8 Supercars Australian Open **BBL** Fans (n=445) Fans (n=353) (n=690) Fans (n=684) Fans (n=953) (n=369) (n=493) (n=881)

Interest in sport changed due to Covid-19

Interest in sport has declined

Interest in sport has remained the same

Interest in sport has increased

### Likelihood to attend live sport 2021

% of Australian sports fans likely to attend

# 69%

56%

42%

## Avid Sports Fans

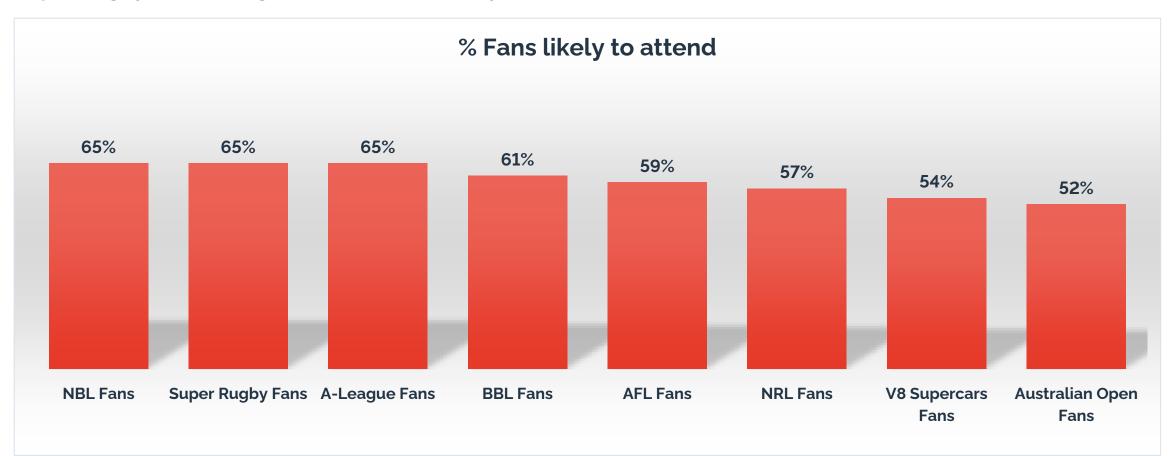
Core Sports Fans

General Sports Fans

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## Likelihood to attend live sport 2021

There is a strong likelihood for all major sports fans to return to live sport again this year, with NBL, Super Rugby and A-League fans the most likely to attend in 2021.

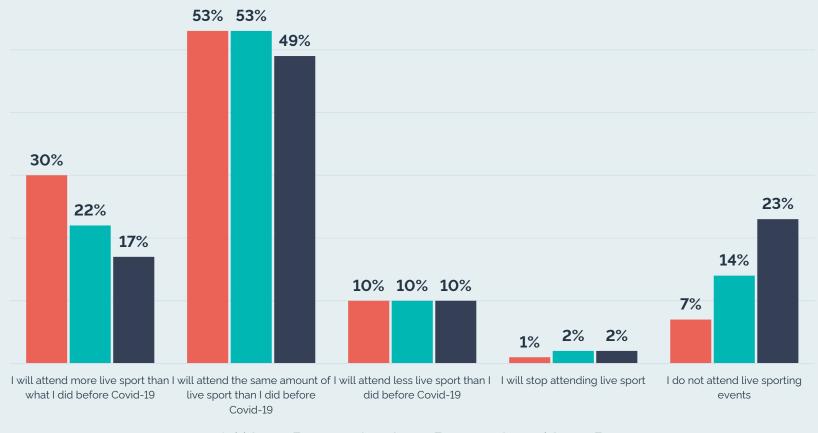


Q: If sports remain available for public attendance in 2021, how likely or unlikely are you to attend live sport this year?

## Live attendance changes post Covid-19

Very few sports fan segments reported a likelihood of attending less sport post Covid-19.

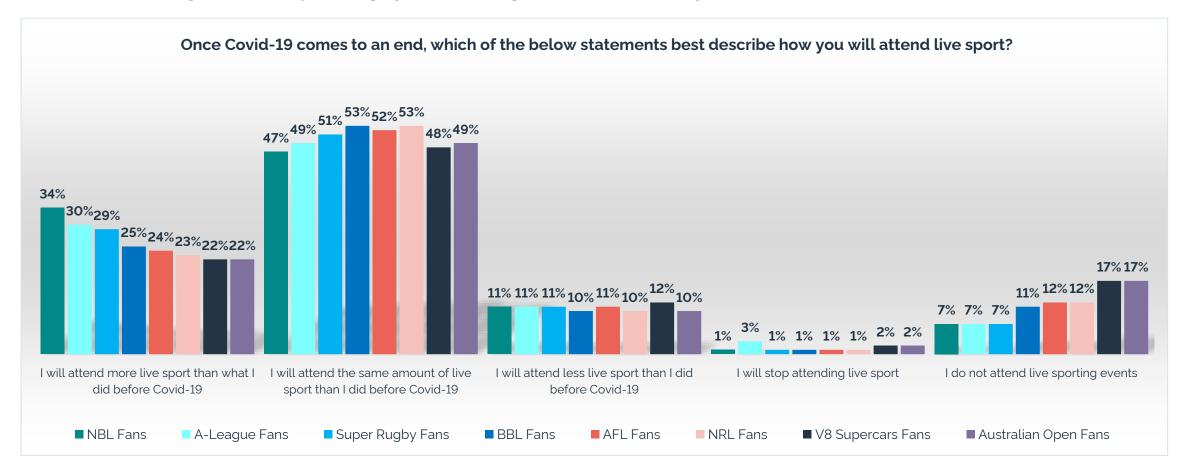
83% of avid fans and 75% of the core fan groups said they would attend the same or more games than what they did prior to Covid-19.



Avid Sports Fans Core Sports Fans General Sports Fans

## Live attendance changes post Covid-19

Generally all major Australian sports are likely to attend the same or more live sport post Covid-19, with NBL, A-League and Super Rugby fans listing as the most likely fanbase to attend more.

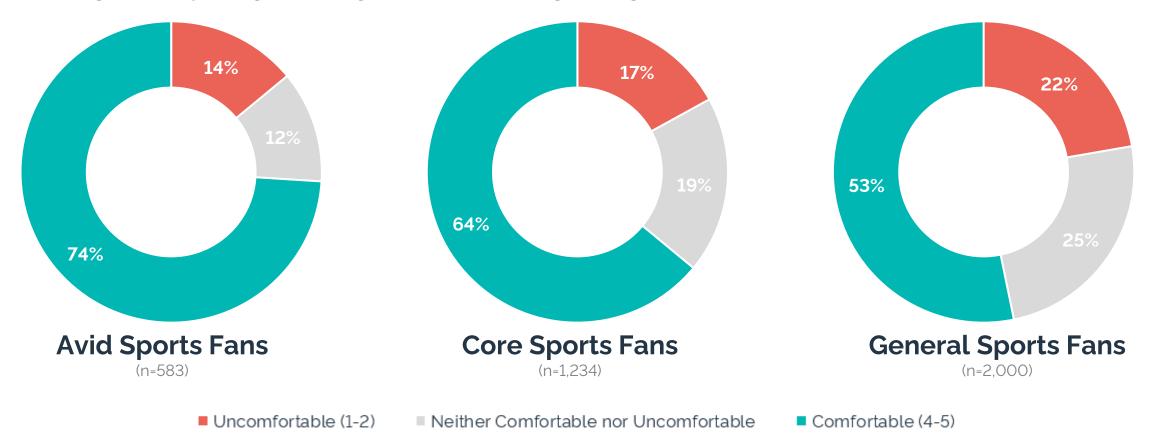


YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: Once Covid-19 comes to an end, which of the below statements best describe how you will attend live sport?

## Are fans comfortable attending live sport again?

Avid fans are the most comfortable watching sport inside a stadium with close to 3 in 4 not showing any concerns. Across all levels of fan avidity there is a limited number of sports fans who are uncomfortable returning to live sport again, with general fans ranking the highest with 22%.



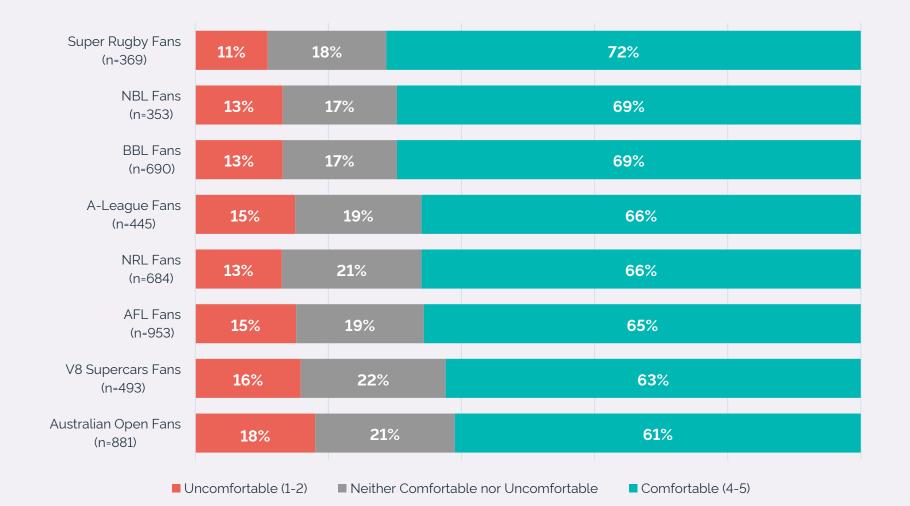
YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: Assuming there were no barriers to entry, how comfortable would you be sitting inside a stadium watching a live sporting event?

## Are fans comfortable attending live sport again?

Overall the large majority of Australian fans across all major sports leagues are either comfortable, or unaffected when considering returning to live sport again in 2021.

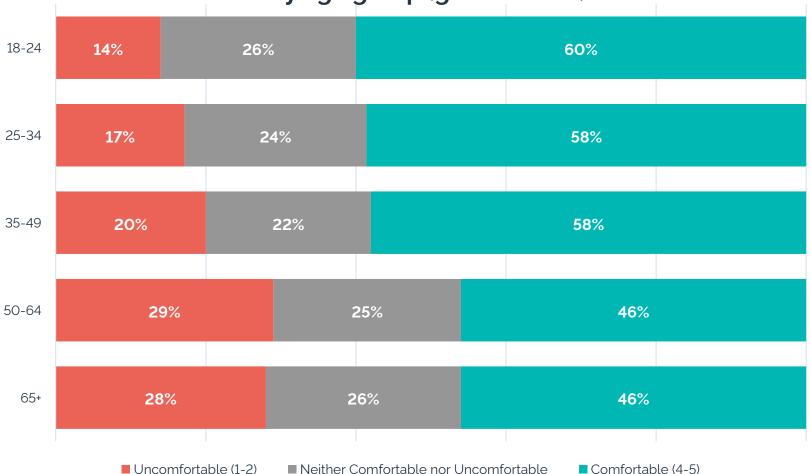
Super Rugby fans are the most comfortable attending live sporting events in a stadium.



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## Youthful fans the most comfortable to attend

Generally the younger the fan age demographic in Australia, the more comfortable they are with returning and attending live sport again in 2021.



#### By age group (general fans)

YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: Assuming there were no barriers to entry, how comfortable would you be sitting inside a stadium watching a live sporting event?

### How well did sport handle Covid-19

#### % fans said sport handled well (8-10)

Rating on a scale of 1 (extremely poorly) to 10 (extremely well)

# **69% 57%**

# 46%

#### Avid Sports Fans

Core Sports Fans (n=1,234)

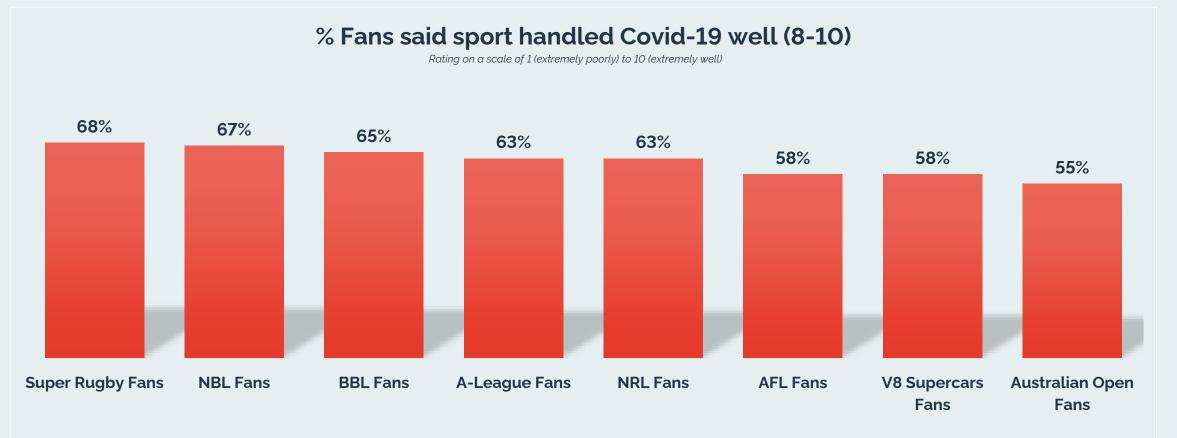
#### General Sports Fans (n=2,000)

YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: Overall, how well do you think the sports industry has handled Covid-19? (i.e. enabling seasons to go ahead, keeping fans safe, regular Covid-19 updates, looking after players and staff, providing additional sporting content etc.).

## How well did sport handle Covid-19

Super Rugby, NBL and BBL fans rated the sports industry most positively for how it handled the challenges Covid-19 created.



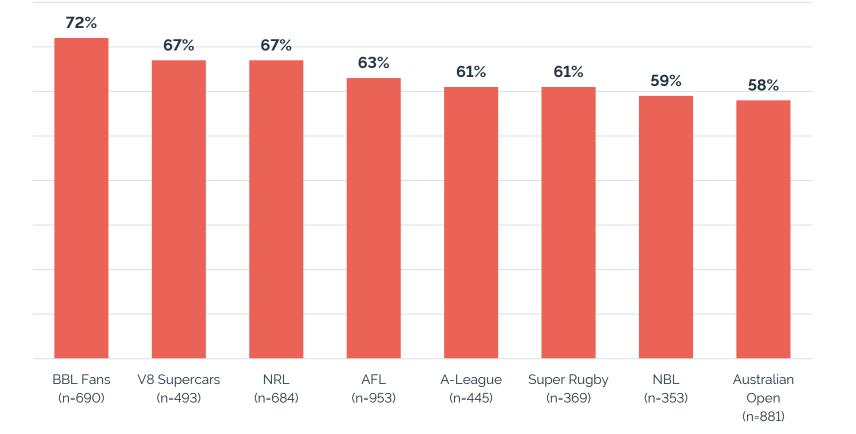
YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: Overall, how well do you think the sports industry has handled Covid-19? (i.e. enabling seasons to go ahead, keeping fans safe, regular Covid-19 updates, looking after players and staff, providing additional sporting content etc.).

## Which league handled Covid-19 the best?

The Big Bash Cricket League (BBL) was recognised by their fans as the best performing league when it came to handling the challenges of Covid-19.

The Australian Open and its fans rated the event the poorest performer.



#### % of fans who said league handled Covid-19 well (8-10) Rating on a scale of 1 (extremely poorly) to 10 (extremely well)

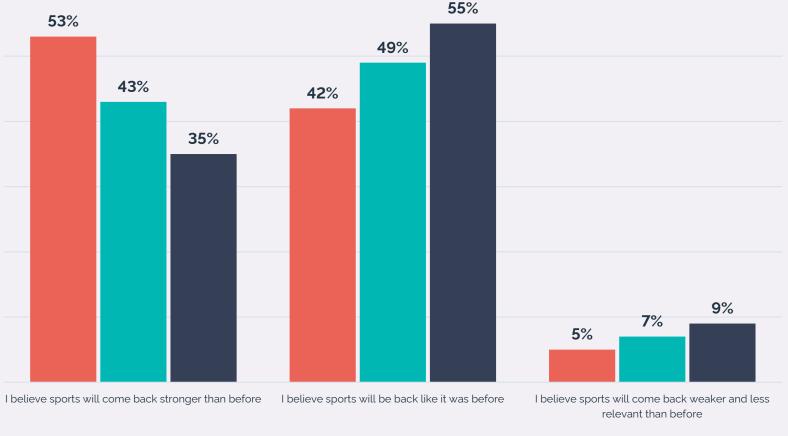
YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: How well have the following sporting organisations handled Covid-19? (i.e. enabling seasons to go ahead, keeping fans safe, regular Covid-19 updates, looking after players and staff, providing additional sporting content etc.). Note: Fans were only asked to rate leagues they were a fan of (top interest or somewhat interested)

### How will sport look post Covid-19

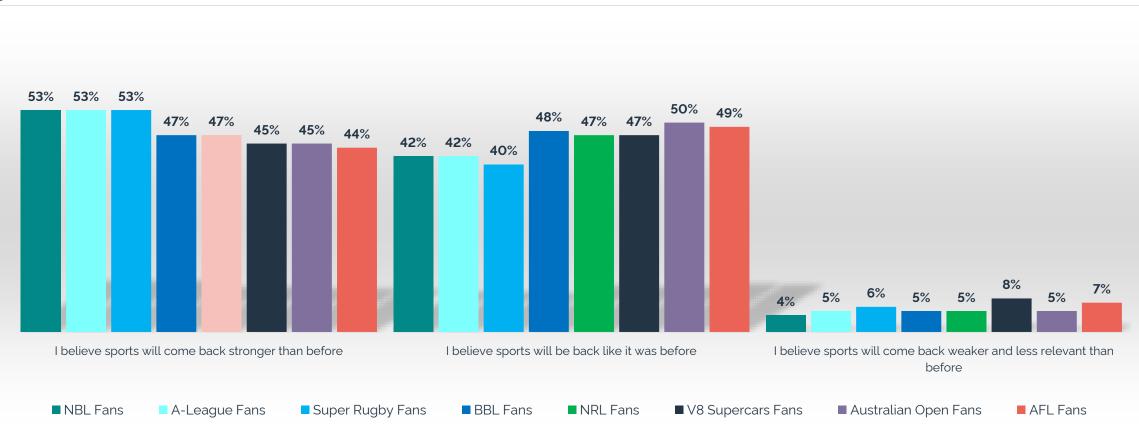
Sports fans are optimistic about how sport will look post Covid-19.

**91%** of the general sports fan segment believe sports will come back the same or stronger than it was before Covid-19.



## How will sport look post Covid-19

Across all major Australian leagues most fans within each code believe that sport will return stronger, or at least to the same levels as pre Covid-19. NBL and A-League fans are the most optimistic for how sport will look post Covid-19.



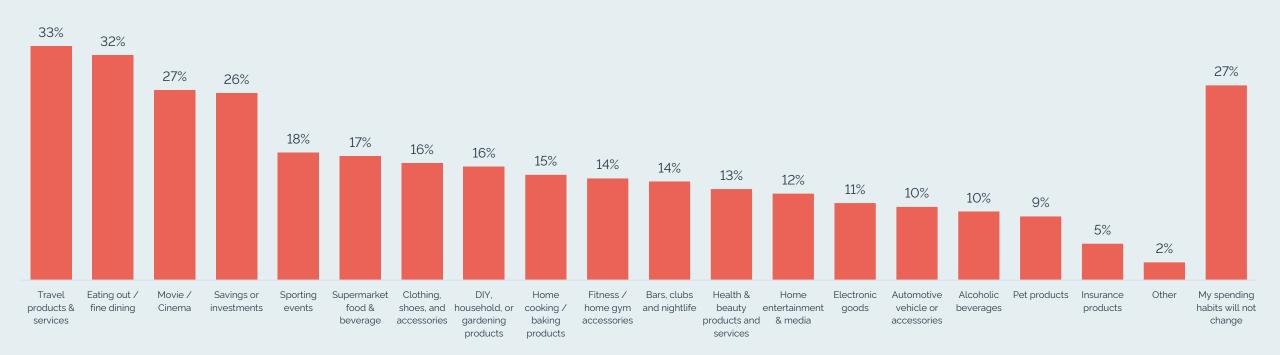
Q: Once Covid-19 passes and professional sport resumes back to normal, which of the following statements do you most agree with?

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## Will fans spending habits change post Covid-19?

As Australian sport recovers from Covid-19 there are opportunities for brands to partner with leagues and clubs and establish meaningful connections with sports fans. Below outlines the key categories where sports fans are likely to spend more household income post Covid-19 and presents a unique opportunity.

When Covid-19 ends which of the following categories do you anticipate you will be allocating more household income towards? (General sports fan segment)



YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.

Q: When Covid-19 ends which of the following categories do you anticipate you will be allocating more household income towards?

#### **Statements on Covid-19 and sport**

COVID-19 & Leters patrix upons (0) shear pre m

#### 36%

I am more likely to support or purchase from a brand who remains a sponsor of a sport's league or team I follow despite the challenges of Covid-19.

#### 46%

YOUGON Sport

As a loyal fan of my sports league or club I am frustrated when I see partners leave during challenging times.

#### 32%

When Covid-19 ends I will be more likely to take up membership of my favourite sports teams to show support.

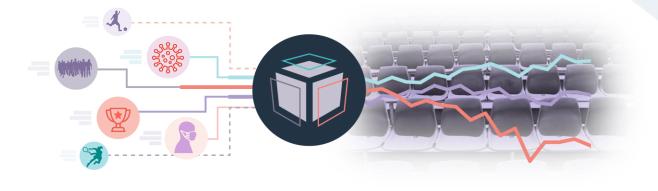
#### 68%

Even though it was more difficult to watch my favourite sport or team in person during Covid-19, I made sure I continued to support and watch them on TV or via streaming whenever I could.

### **Statements on Covid-19 and sport**

Statement	AFL Fans	A-League Fans	Australian Open Fans	BBL Fans	NBL Fans	NRL Fans	Super Rugby Fans	V8 Supercars Fans
I am more likely to support or purchase from a brand who remains a sponsor of a sport's league or team I follow despite the challenges of Covid-19.	38%	51%	36%	42%	52%	41%	54%	45%
As a loyal fan of my sports league or club I am frustrated when I see partners leave during challenging times.	48%	57%	47%	52%	55%	51%	58%	50%
Even though it was more difficult to watch my favourite sport or team in person during Covid-19, I made sure I continued to support and watch them on TV or via streaming whenever I could.	69%	71%	65%	73%	74%	71%	76%	64%
When Covid-19 ends I will be more likely to take up membership of my favourite sports teams to show support.	35%	47%	32%	38%	49%	38%	50%	39%

**YouGov Sport. Covid-19 & the Recovery of Australian Sport Custom Research. March 2021.** *Q: To what extent do you agree or disagree with the following statements regarding Covid-19 and sport?* 



# Methodology and sample



# Methodology

The data used for this analysis was taken from the YouGov Australian panel. The project was run from **March 1<sup>st</sup> – March 3<sup>rd</sup> 2021**. The project consisted of two screener questions and ten core survey questions specific to Covid-19 and its impact on Australian sport.

#### Who did the project target?

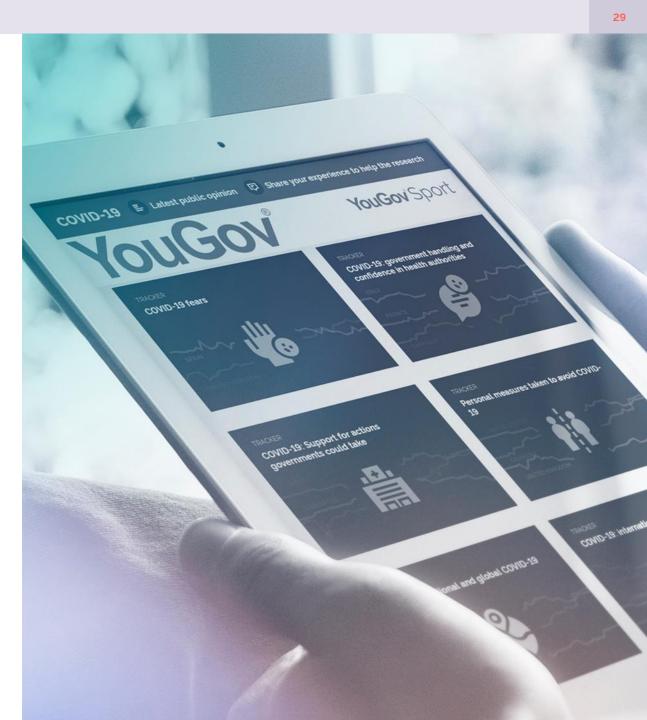
The project included a screener question asking respondents what their level of interest was towards sports in general. Respondents who identified as having any level of interest in sport (2-4) were included in the study. A follow up question was then provided asking the same question specific to key Australian sports leagues. Core fans is our primary 'sports audience'.

- 1. Not at all interested [NOT INCLUDED]
- 2. A little bit interested
- 3. Somewhat interested
- 4. One of my top interests

#### How are fans defined in this report?

Avid Fans	One of my top interests.
Core Fans	One of my top interests OR Somewhat interested (combined).
General Fans	One of my top interests OR Somewhat interested OR A little bit interested (combined).

**Sports League Fans** One of my top interests OR Somewhat interested in specific sports league (combined).



# Sample

Avid Sports Fans n=583	BBL Fans n=690
Core Sports Fans n=1,234	NBL Fans n=353
General Sports Fans n=2,000	NRL Fans n=684
AFL Fans n=953	Super Rugby Fans n=369

A-League Fans n=445

#### Australian Open Fans n=881



V8 Supercars Fans n=493

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# YouGov Sport Australia



# YouGov<sup>®</sup>Sport

YouGov Sport is the preferred partner of the leading Australian sports properties.



The proud research providers for the AFL and clubs.



### **Our services**



#### 1) SYNDICATED CONSUMER DATA & INSIGHTS

- > Brand metrics
- > Audience & Category Insights
- > Digital audience insights and Performance metrics
- > Sales data
- > Global trends and insights
- > Syndicated Research
- > Partner Insights
- > Custom Research

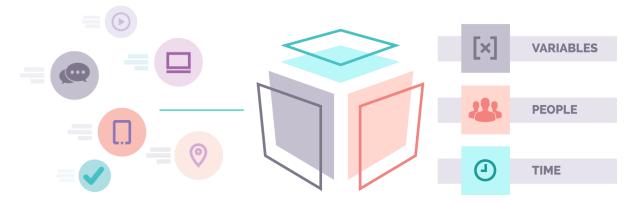


#### 2) MEDIA SERVICES

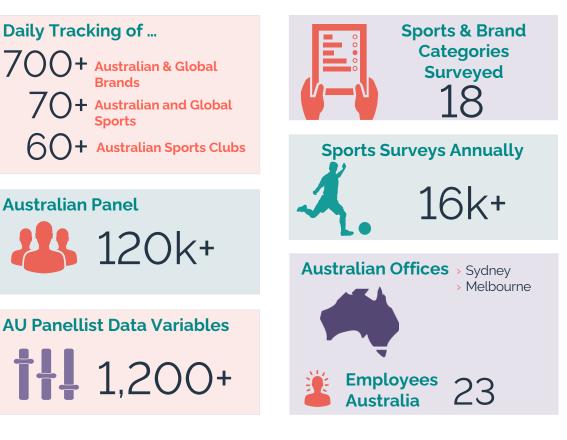
- > Exposure metrics
- > Digital audience insights and Performance metrics
- > Brand Recommendations
- > Comparative Data & Benchmarking

### YouGov Sport Australia

In Australia, we are a global sports, sponsorship and entertainment research company, working with the industry's key players to unlock meaningful, actionable insights.



YouGov Sport has one of the world's top international market research and data analytics networks comprising of:



Best panel, best data, best tools

### The insights we provide



Do AFL Fans support a night-time

Grand Final?

BLOG | by YouGov Sport ... For more than

100 years the AFL Grand Final has stood as the premier event in Australia's sporting

calendar. The final this year will be very

different, with the AFL breaking away from an MCG afternoon Grand Final to an

vening spectacle hosted in Queensland at The Gabba. While debate is healthy, let's

use data and insights to see how things

Australia's Hottest Tickets: what

tickets are highest on Australians'

wish-Lists

BLOG | by YouGov Sport \_ With Christmas

just around the corner, we thought we'd take a look at what tickets are highest on

Australians' wish-lists for Santa as we head

into another exciting year of sport. Using our Consideration metric, which asks

respondents daily what events or competitions they would most like to

attend if money and geography were no

object.



#### What are the key take outs from this study?

Does sport metter for quality of Infe? Missign scores fans boliever that is imposter for overall quality of fan, results were 33% ornorgat the general Australian population	Do fans still have an appetite for sport? Bis of sports fans unoverda door gepenter an extended operate workshop any live operate workshop any live operate workshop any live appetite workshop any live appetite or concern for when sport exclutorem back (20 mill	What are fan altitudes around holding sport during Covid-10 <sup>3</sup> The mastery of sports the importance of sport parts importance of sport parts is covided frequent and clubs and to the economy.	Are sports fans conflor lable with opening gamms up to the public? Are south a sector public? conflortable with gamms being openent to the public with any monitor for gamms containing barried (closed doors)	Are fans likely to attent sport in 2020 if it lesco available? If sports become swillable be public in 2000 only 29 sports fans said flavy would likely to an said flavy mould likely to an end (2 Bm). This hydrogets the continuing he bowle of concern still anish the sports community as Covid-29 cases continue
What precautions can versues to take to get fans back feeling controltable? Reduced coupanry to allow more space between fans is and versues catable to constite sport fans and the general feeling fans and the general feeling on the control of point fans and the general feeling on the control of the measures were shown to rave take influence.	What is the likelihood of fans consuming more sports content?». Style a sports the said they were there to easi were there to easi were they to easi were sport sports and the previous year.	Are fans more likely to attend sport this season compared to last year? Arts of sports fans said they were more likely to atte show were more likely to atte show previous season Among it the general Autifulian population this figure was 10%	Will licket promotions influence fans to attend sports events? In total 30% of sports fans said yes ticket promotions would influence inter boattende woods and atte soid wouldn't	How do fans think spor will look post Covid-19 \$30 of sports fans baleve sport will be back before a 20 back be back before a sport will be back before a sport sport highlighter the out free back of the would be back as it was be



AFL I It's been an unusual year. How much have changes affected Buzz around the League? BLOG I by YouGov Sport ... The 2020 AFL

pason has been like no other in March the season was 'paused' the AFLW finals series cancelled and staff stood down. In June. players migrated to hubs and played shortened games in empty stadiums. according to an adjusted fixture list. Just big an impact did all these



How big an impact will the retirement of the Holden brand in Australia have on V8 Supercars

BLOG | by YouGov Sport - Holden has been a much-admired and loved brand for countless generations of Australians and its long and proud history won't easily be forgotten. The announcement that Holden would cease operations came as a shock for many. YouGov Sport looks at how Australians, and more specifically Supercars fans, feel about the news and what kind of impact it will have on the sporting landscape going forward.



#### Australia | Sports, Fans and Social Issues in Under 3 Minutes

BLOG | by YouGov Sport ... Do Australian sports and teams do enough to address and support key social issues in Australia? Should brands and partners get involved? And with such a heavy cluster of issue where does sport even begin to identify what sports fans truly care about? Fortunately, our latest YouGov Profiles dataset has these questions covered fo



#### Australians and sports betting in under 5 minutes

BLOG | by YouGov Sport - Betting has long been an intrinsic part of the Australian sporting identity. But while, as the saying goes. Australians would bet on two flies rawling up a wall, we thought we'd find out just how true this saving really is

#### AUSTRALIA

By the end of 2020. Australia looked to have the By the end of 2020, Australia looked to have the pandemic under control, having enjoyed long periods with no new cases from November onwards. But for the rest of the year, the pandemic wreaked havoc on the country's sporting calendar, just as it had around the rest of the world.

Just sneeding under the wire, however, were three of Australia's sporting highlights - the Australian Open dennia), the Big Bash (domestic cricked) and some of the international summer cricket associate.

Is no contridence that have region events/packs unitarititized by any status feasing control that is no investor that we have control frequency of models, however, is paid how much notice the Australian Open creates among Australians. It accrear more than 35 paints higher than its nextend read, the Hig Bent League, which is then closely lied with third, fourth and this positions. Taky the Open wins this one is nating to acc.

Australia's ranking is also notable for the inclusion of two women's t is the top ten. APL Women's corres in 5th, in only its fourth season, that's despite the season being abandoned in March.

Meanwhile, the Warner's Big Bash League, played entirely in Sydney in October /November, movies into seventh position for 2020. Warnrouth Collins League Reventients COMMUNATION



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YouGov

### Contacts



#### **NED MORRIS** Managing Director

Joining YouGov Sport in May 2018, Ned brings over 15 years' experience of initiating and implementing strategic management solutions in the sports industry. Ned has driven the business forward in its first few years managing the ongoing strategic partnerships with the AFL and clubs, NRL, Supercars, NBL, A-League amongst others.

Previously working for Repucom/Nielsen Sports, first starting and running the Middle East office for seven years (including managing the Emirates and the International Cricket Council account for 5 years) and then returning to Australia running the Melbourne office (including managing the Australian Grand Prix Corporation and the AFL).

Ned has worked with clients including Abu Dhabi and Bahrain F1 Grand Prix, European Tour, Etihad and Emirates. Ned operates out of Melbourne bringing his strong insight skills and drive to develop the YouGov Sport business whilst enjoying his passion for all things sport.



#### LIAM RANDELL Research Manager, Australia

Liam joined YouGov Sport in March 2019 following a number of years working at other research agencies running custom research projects and working on large brand tracking studies.

Liam currently leads client facing and servicing for YouGov Sport and has worked across a broad range of sports including the National Rugby League (NRL), V8 Supercars, A-League and is currently managing the AFL and clubs, National Basketball League (NBL), Cricket WA and Hockey Australia amongst other clients.

Liam operates out of Melbourne and brings with him knowledge in strategy and insights, strong project management skills and a curiosity for solving business problems. Liam is also an avid Triathlete with a love for all things sport.

### Where to find our other free sports research?

YouGov Sport Australia frequently runs free research pieces to support the Australian sports community (recent articles listed right).

To access this research please use this link: https://sport.yougov.com/tag/sport-in-australia/

#### **Recent Articles**

- > Which sports properties in Australia have the most passionate fan advocates? (2018)
- > Australians and sports betting in under 5 minutes (2019)
- > Australia's hottest tickets: what tickets are highest on Australians' wishlists (2019)
- > Majority of Australians believe that Australian Open should go ahead in spite of bushfires (2019)
- > How big of impact will the retirement of the Holden brand have on V8 Supercars (2019)
- > Australia, Sports, Fans and Social Issues in Under 3 Minutes (2019)
- > Covid-19 and the return of sport in Australia (2020)
- > Australia, digital trends in sports media...how fans are accessing content (2020)
- > Do AFL Fans support a night-time Grand Final? (2020)
- > AFL, It's been an unusual year. How much have changes affected Buzz around the league? (2020)
- > Covid-19 and the recovery of Australian Sport (2021)
- > Who is Australia's favourite current female athlete? (2021\*)

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YouGov Sport is an integrated division of YouGov – one of the world's largest and most respected research firms. 

YouGov was founded in 2000 on the principle that online surveys represented a better way to accurately assess public opinion.

At the heart of our company is a global online community, where millions of people and thousands of political, cultural and commercial organisations engage in a continuous conversation about their beliefs, behaviours and brands.

#### Best panel, best data, best tools

Available from YouGov	BrandIndex
Broadcast Viewership Analysis	SportsIndex
Media Monitoring & Valuation	FootballIndex
Sponsorship Valuation	DestinationIndex
Sponsor Fit Analysis	Fan / Consumer Profiling
Branding Optimisation	RealTime / Omnibus Surveys
Economic Impact Assessment	Bespoke Consumer Surveys

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