



# **Covid-19 & the recovery of Australian sport 2021**

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# Introduction

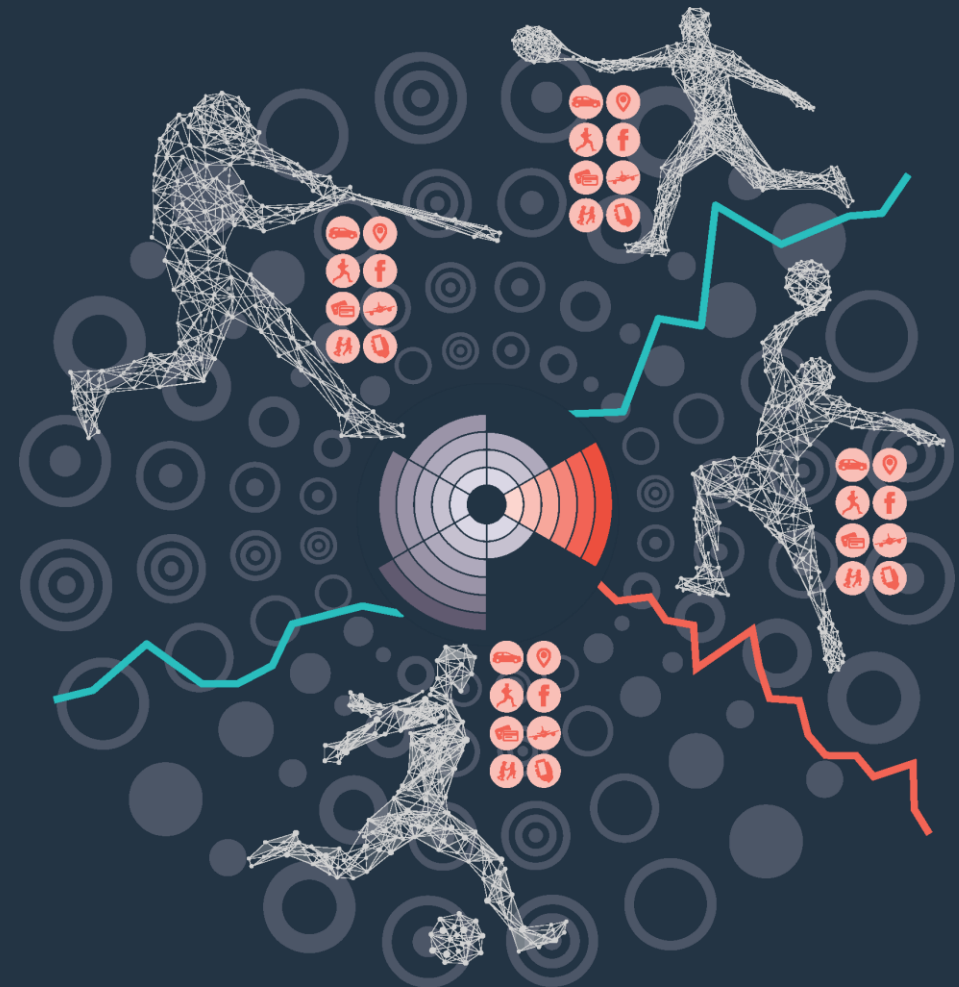
**2020 was a challenging year for both global and Australian sport, however rather than dwell on the past, let's look forward to how sport will recover in 2021.**

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

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## SOME UNPRECEDENTED 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**.



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## 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.



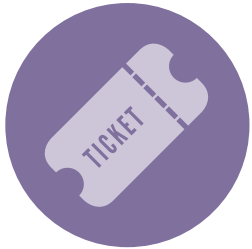
## Interest in sport remains strong

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



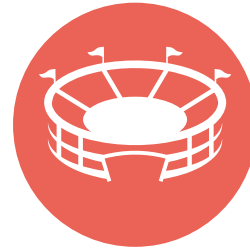
## Sports fans are optimistic

**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.



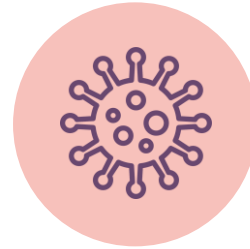
## Majority comfortable attending

**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.



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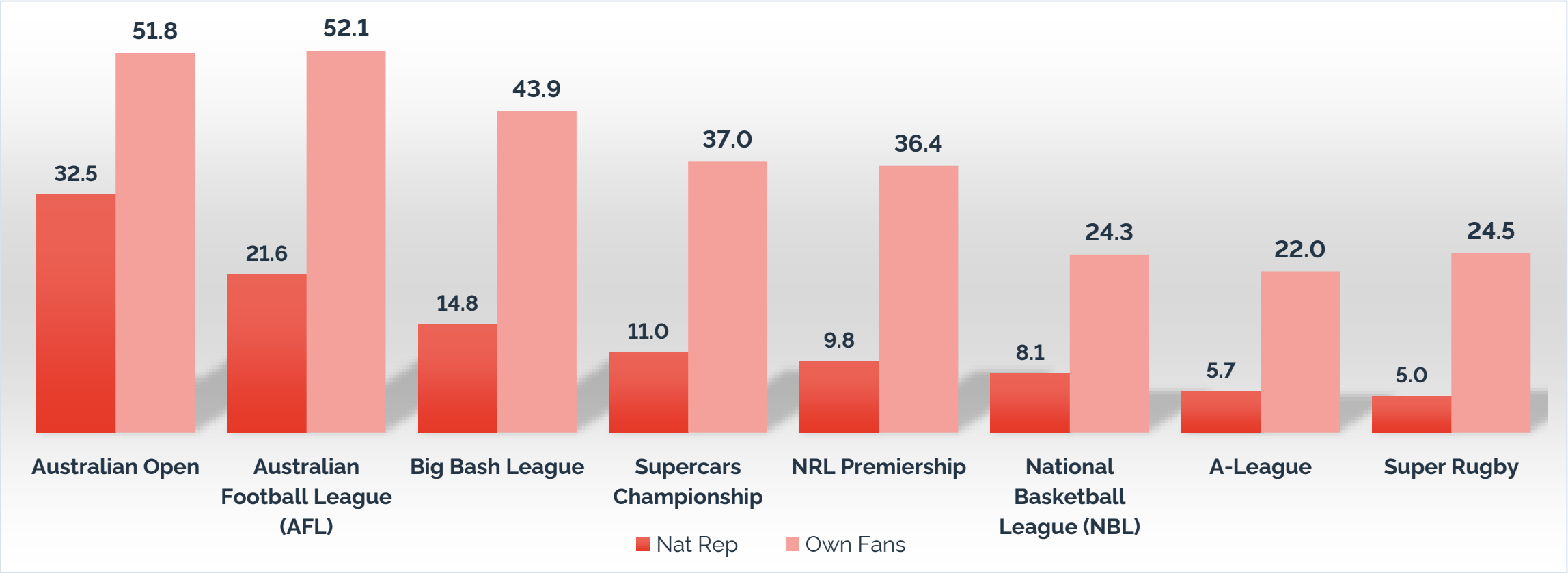
## Australian sports fans & Covid-19



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# 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%

**Avid Sports Fans**  
(n=583)

62%

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

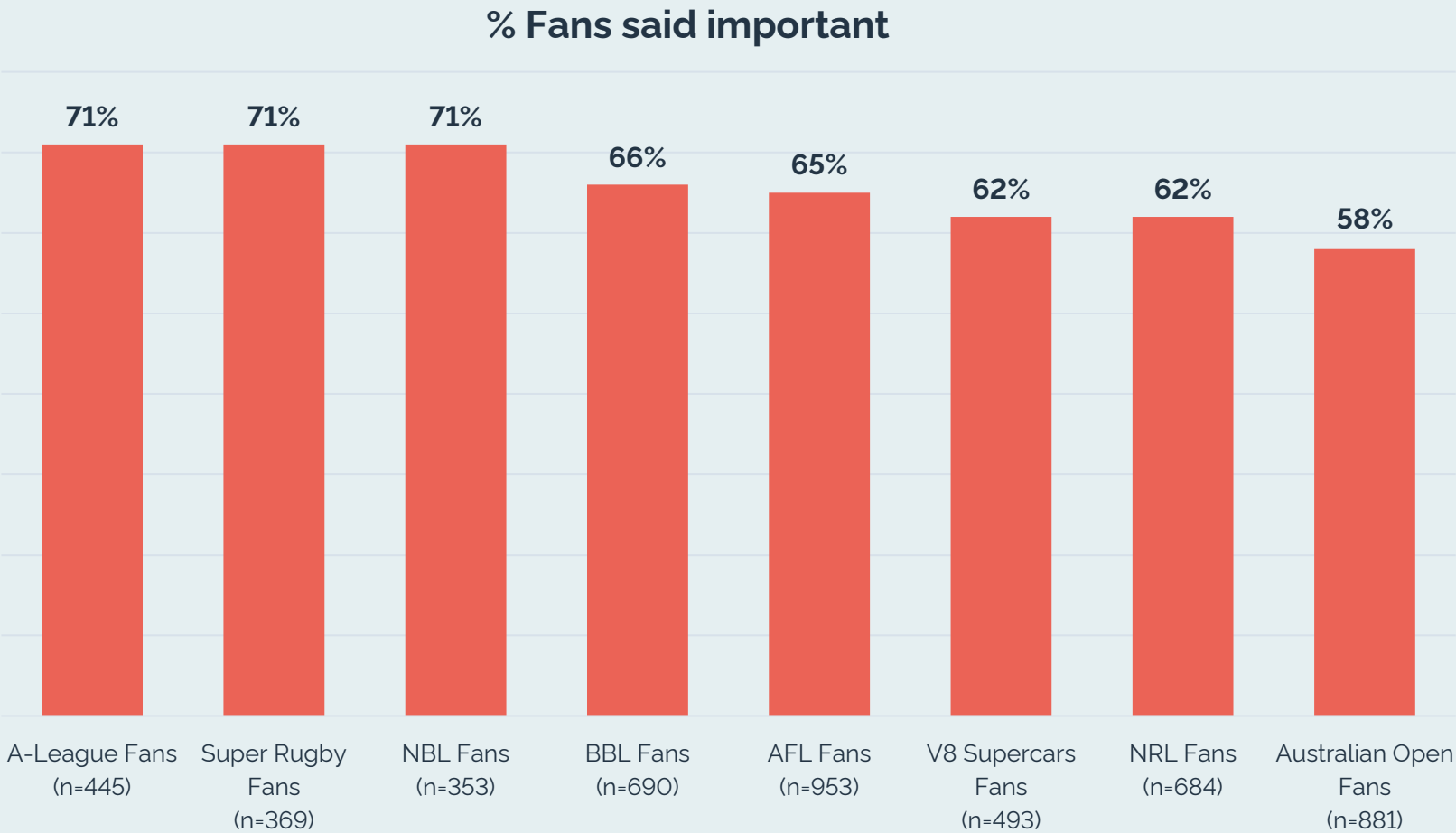
44%

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

# Sport important for quality of life

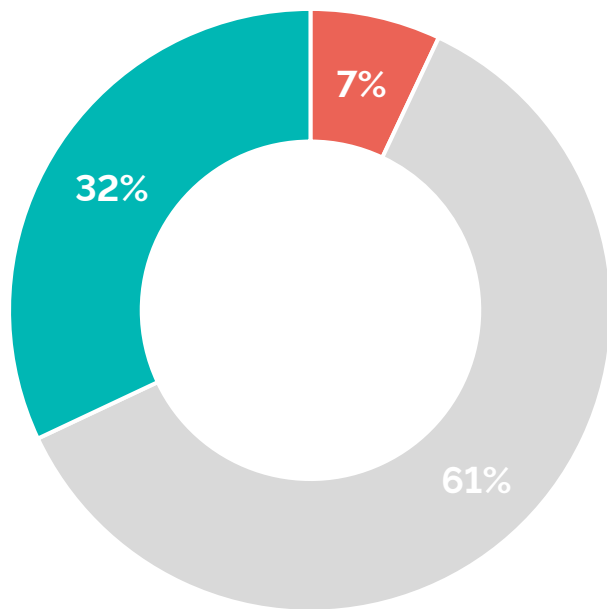


Watching or attending sport for one's quality of life rated highest for A-League, Super Rugby and NBL fans (71%).

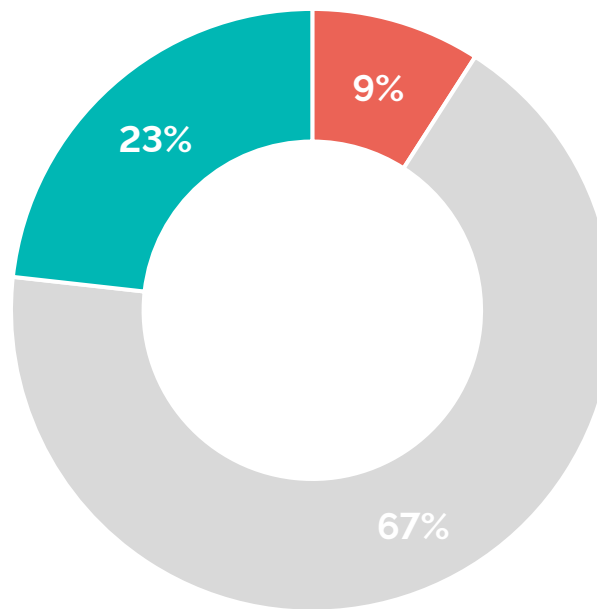


# Interest in sport during Covid-19

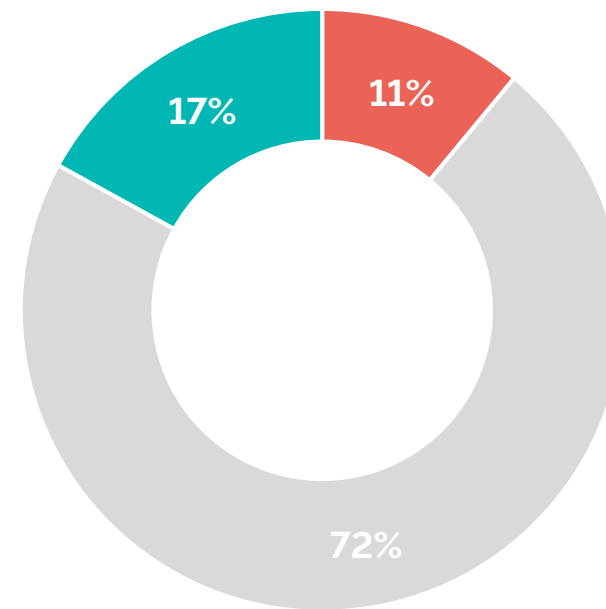
Across key sports fan segments, overall declines in general sports interest were very minimal. For avid fans almost 1 in 3 said that their overall interest in sport had increased as a result of Covid-19.



**Avid Sports Fans**  
(n=583)



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



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

■ 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

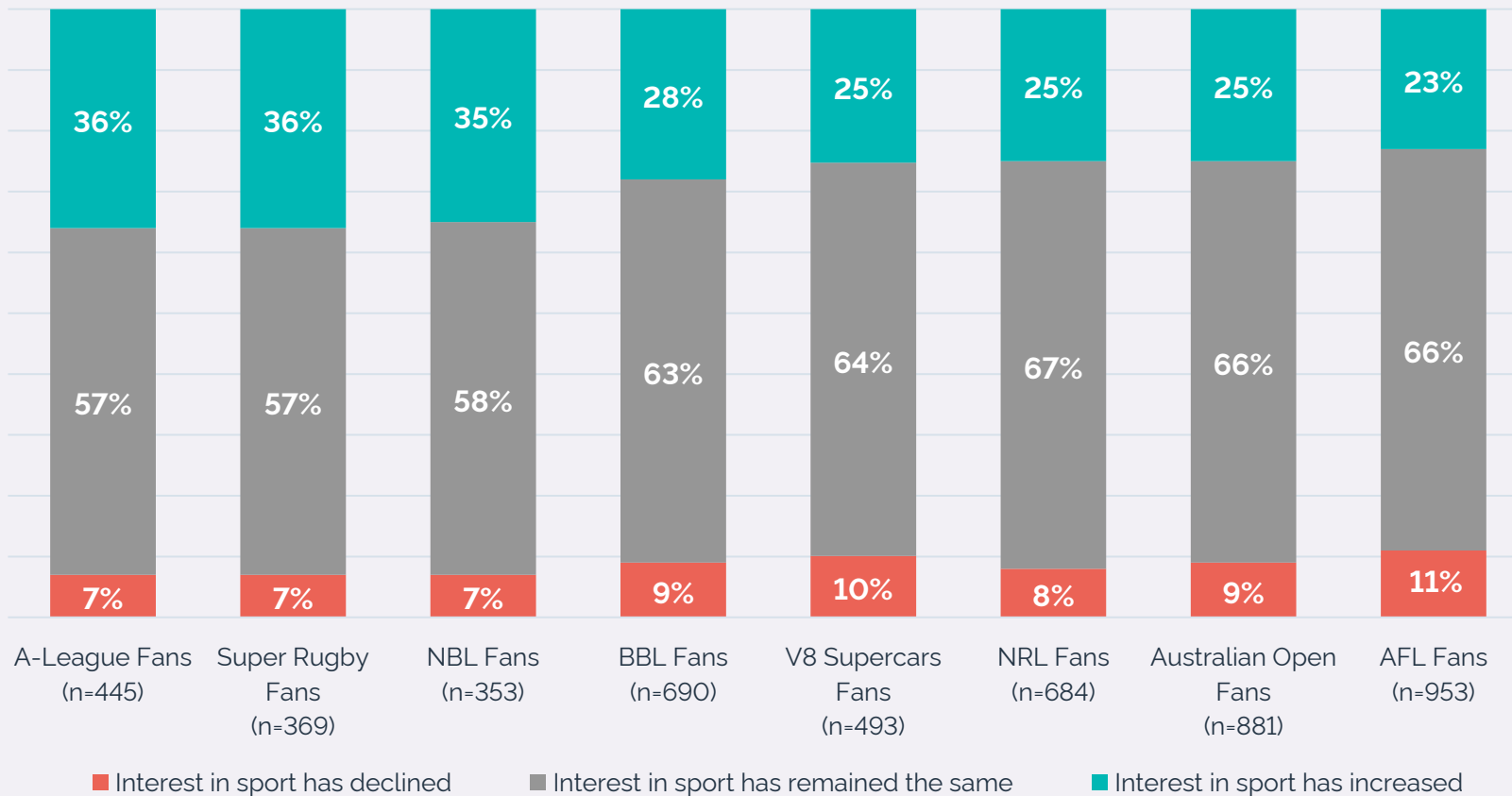
# Interest in sport during Covid-19



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.

Interest in sport changed due to Covid-19



# Likelihood to attend live sport 2021

% of Australian sports fans likely to attend

69%

**Avid Sports Fans**  
(n=583)

56%

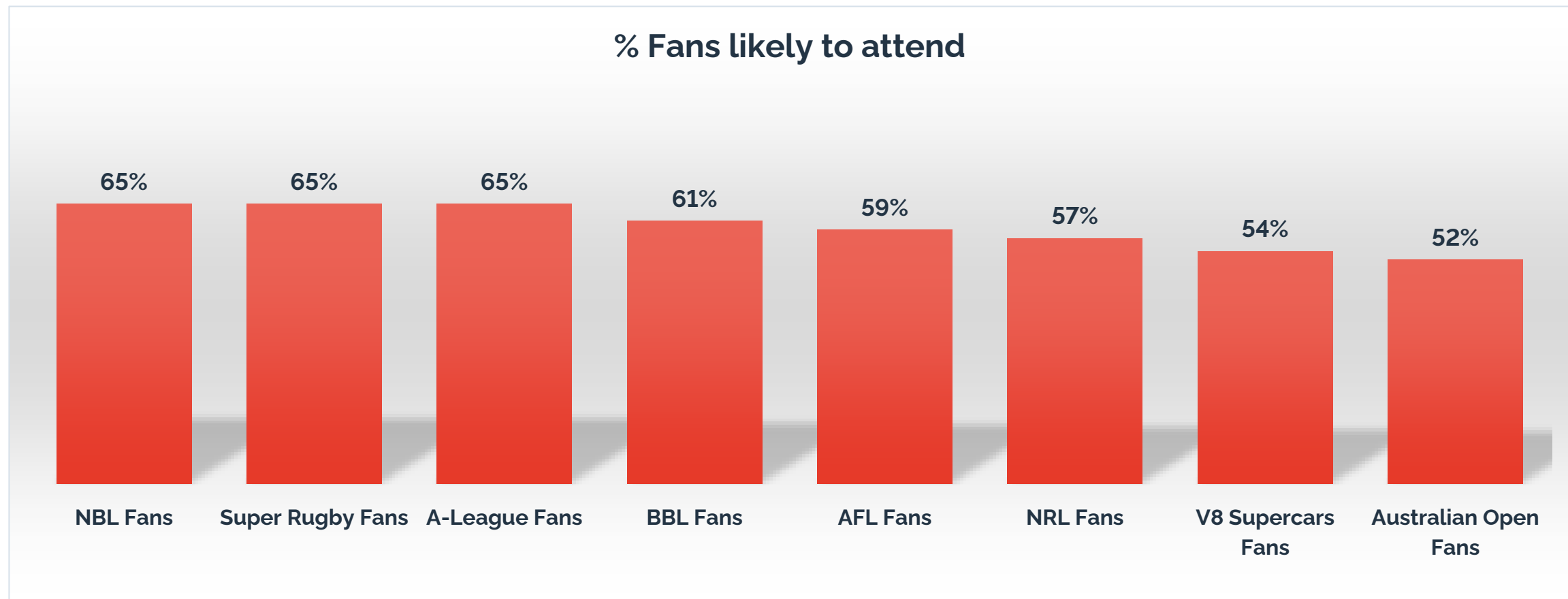
**Core Sports Fans**  
(n=1,234)

42%

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

# 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.



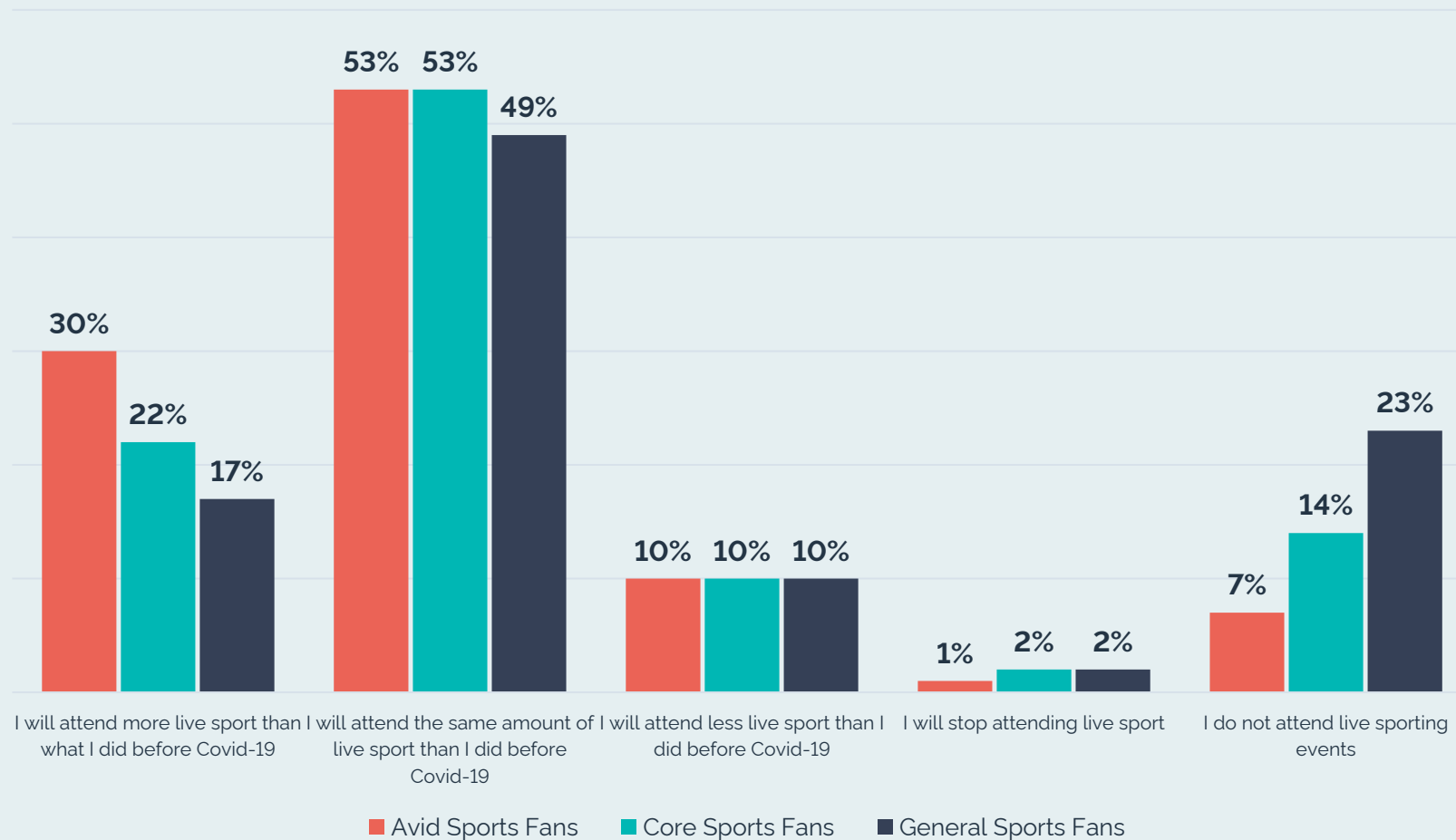


# Live attendance changes post Covid-19



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

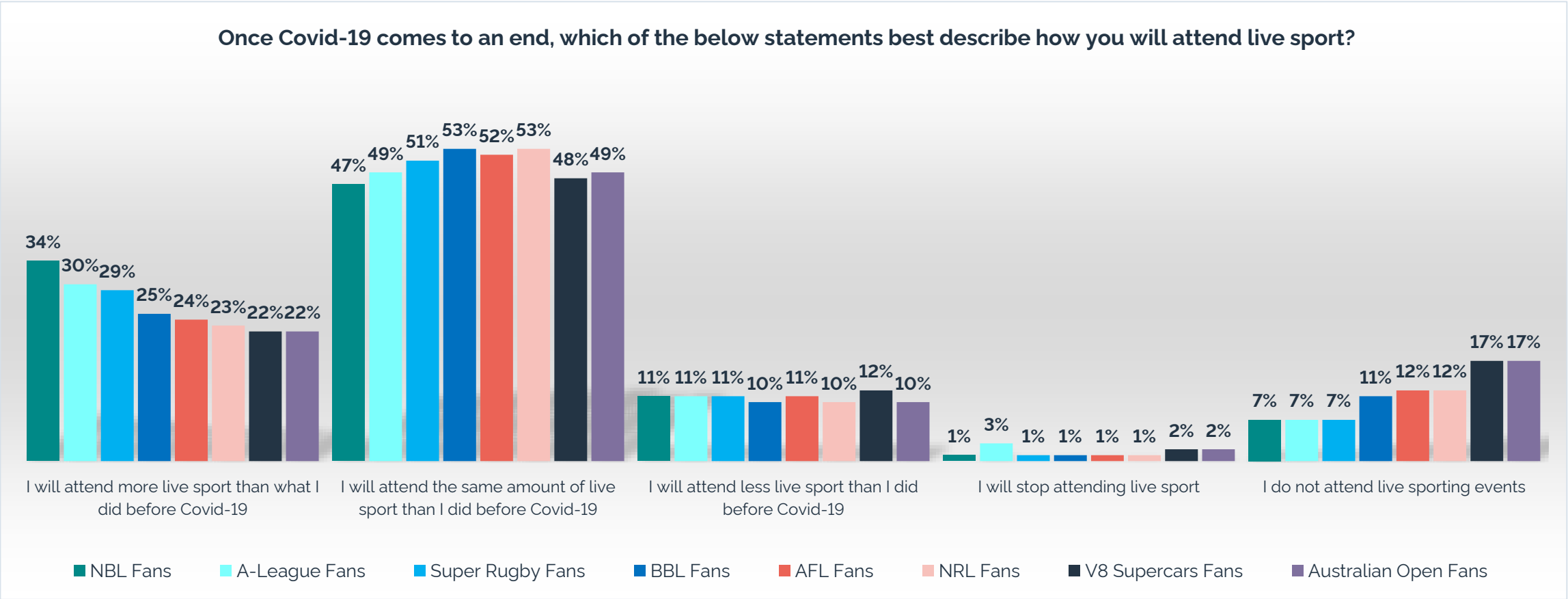
83% of avid fans and 75% of the core fan groups said they would attend the same or more games than what they did prior to Covid-19.





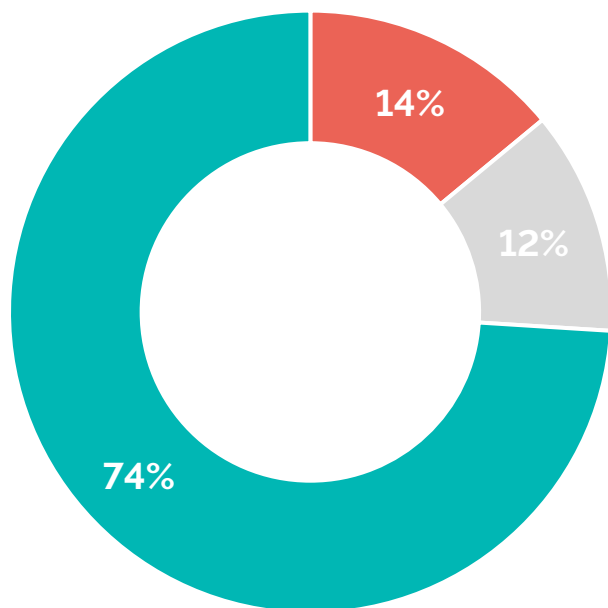
# Live attendance changes post Covid-19

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.



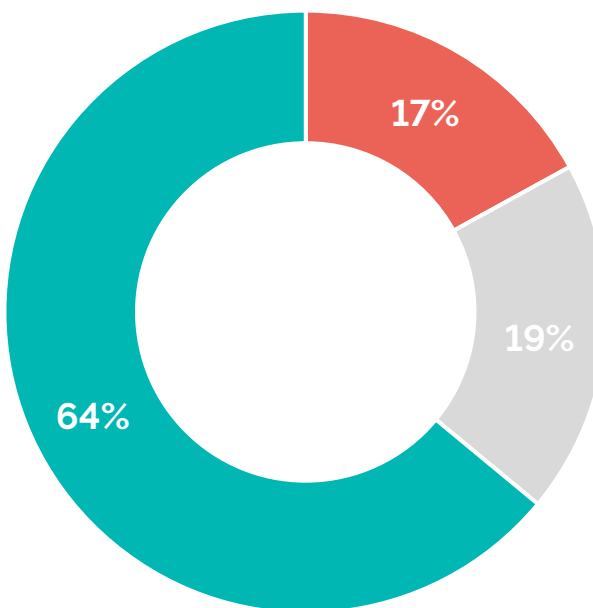
# Are fans comfortable attending live sport again?

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%.



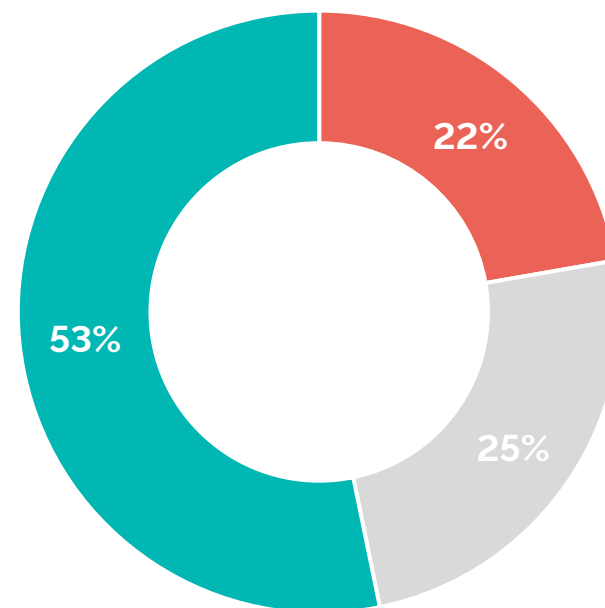
**Avid Sports Fans**

(n=583)



**Core Sports Fans**

(n=1,234)



**General Sports Fans**

(n=2,000)

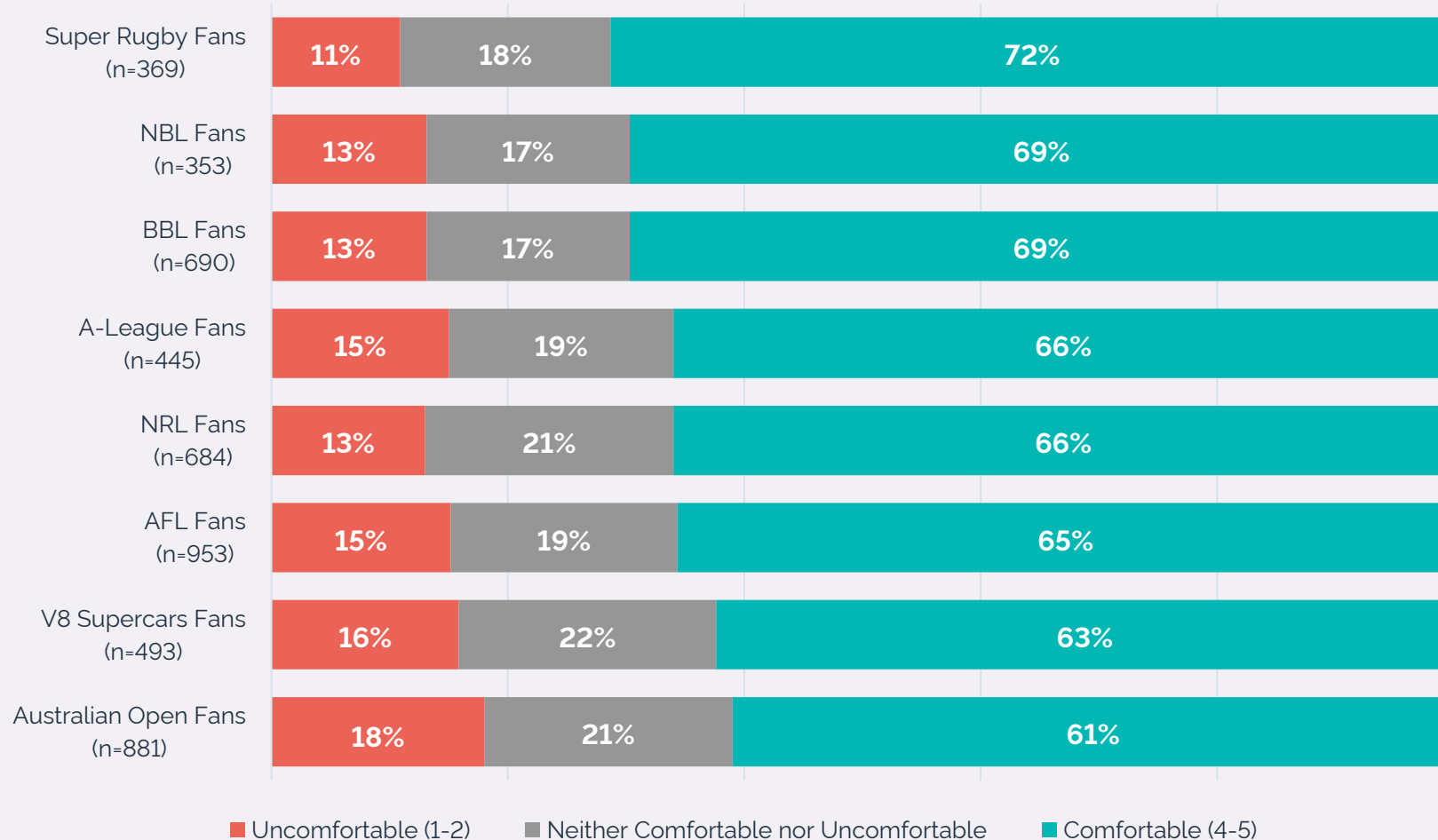
■ Uncomfortable (1-2)
 ■ Neither Comfortable nor Uncomfortable
 ■ Comfortable (4-5)

# 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.

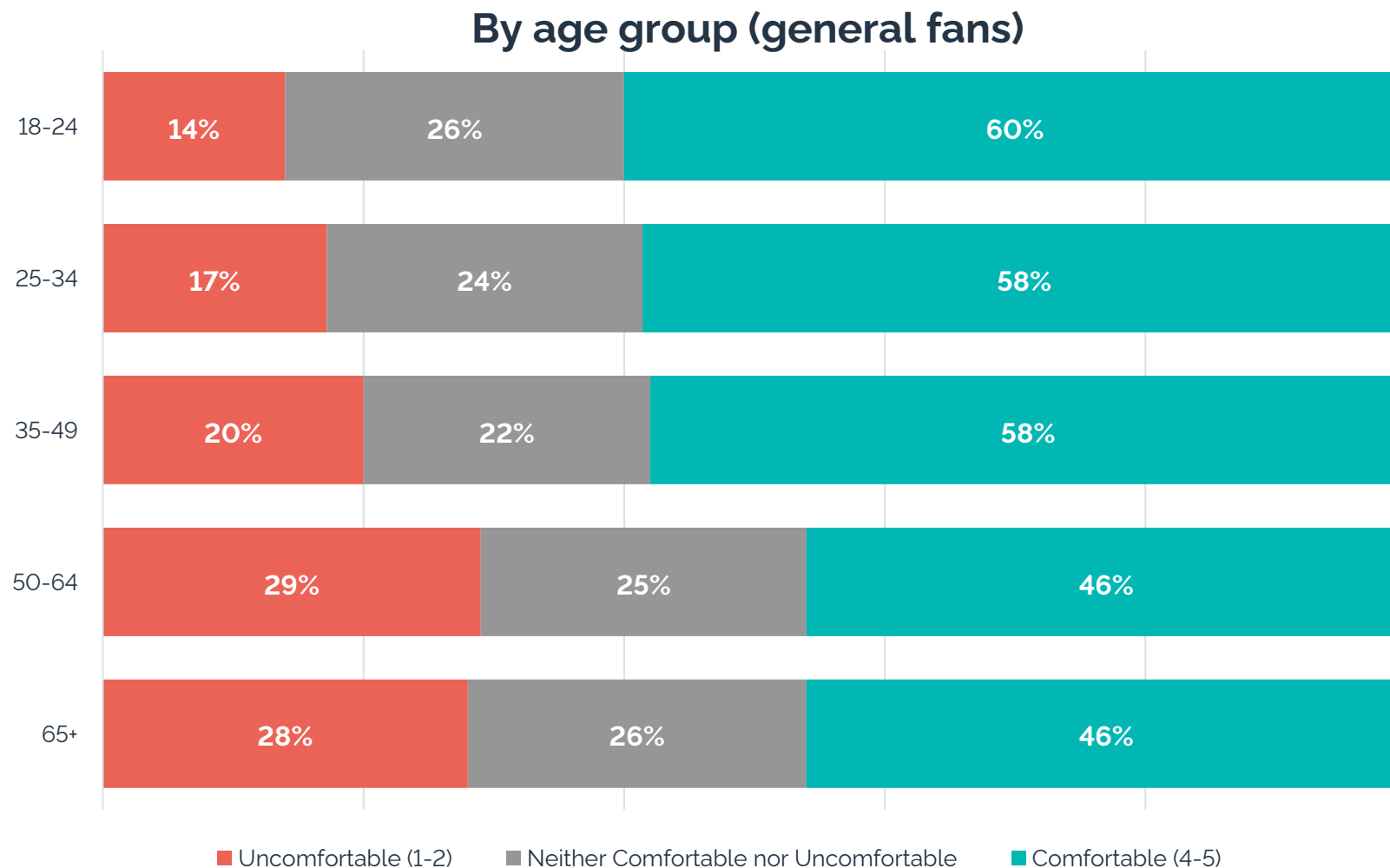
Super Rugby fans are the most comfortable attending live sporting events in a stadium.



# 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.



# 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%

**Avid Sports Fans**  
(n=583)

57%

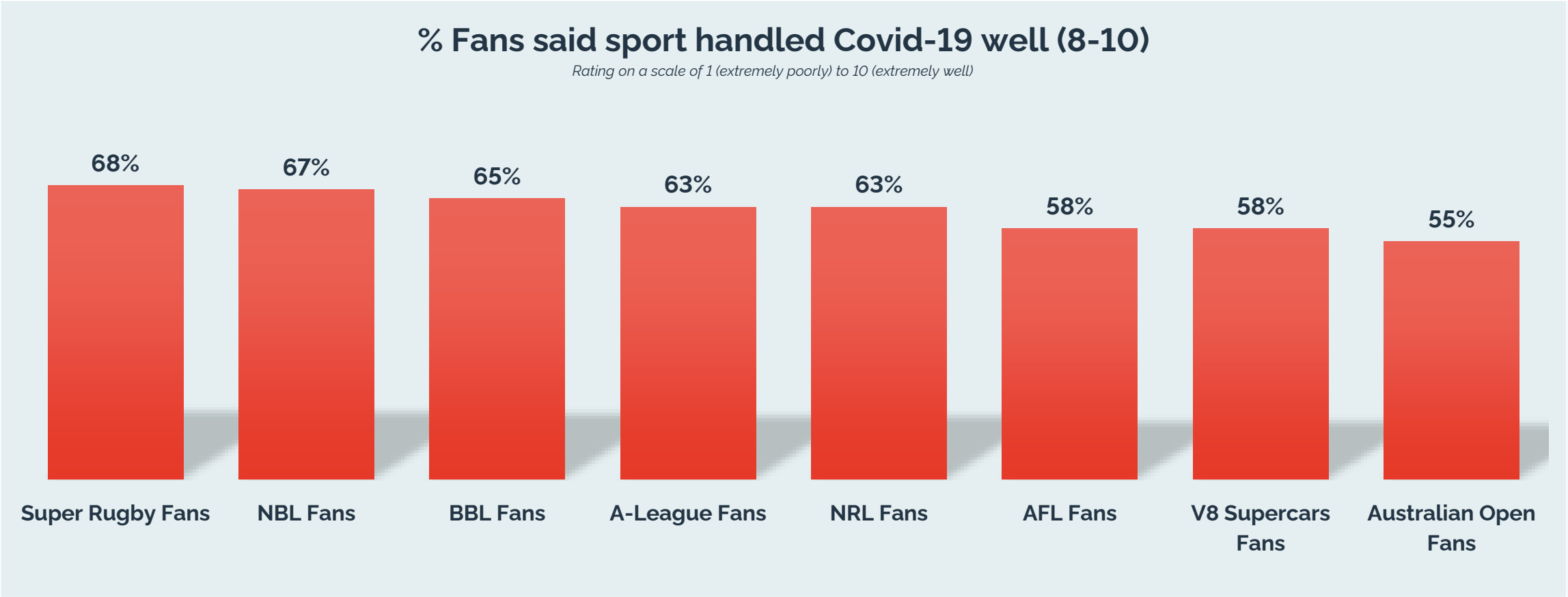
**Core Sports Fans**  
(n=1,234)

46%

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

# 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.



# Which league handled Covid-19 the best?

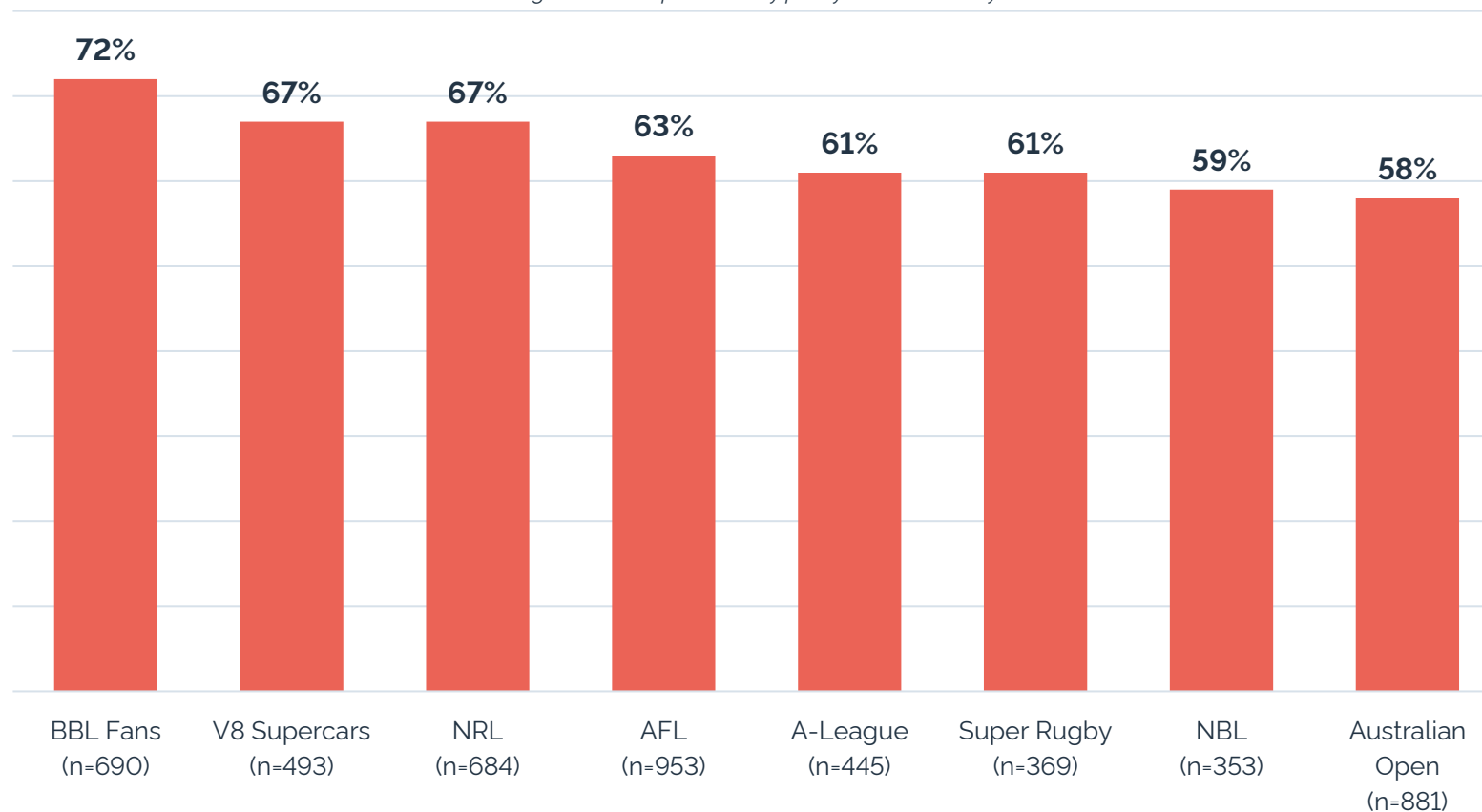


The Big Bash Cricket League (BBL) was recognised by their fans as the best performing league when it came to handling the challenges of Covid-19.

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)*



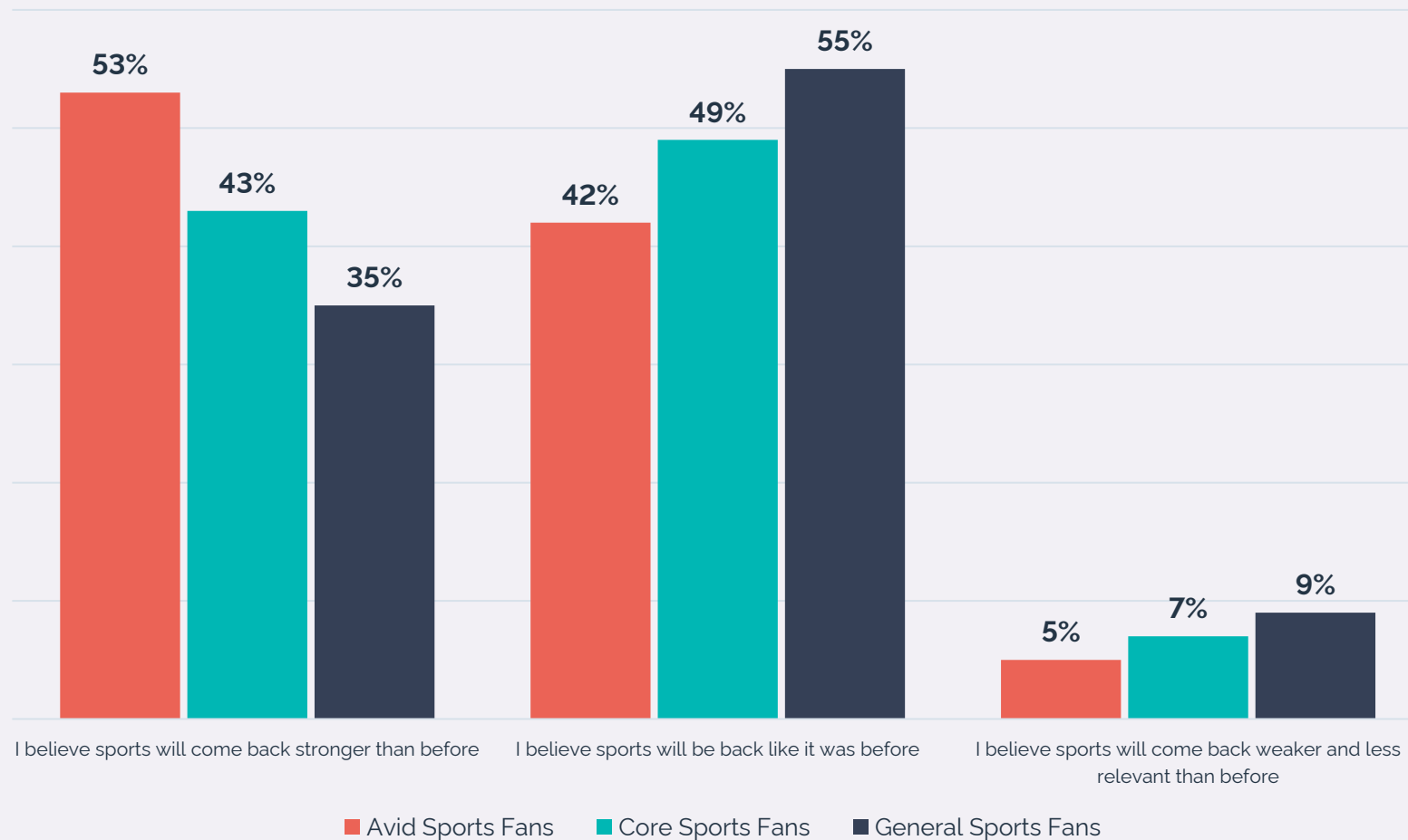


# How will sport look post Covid-19



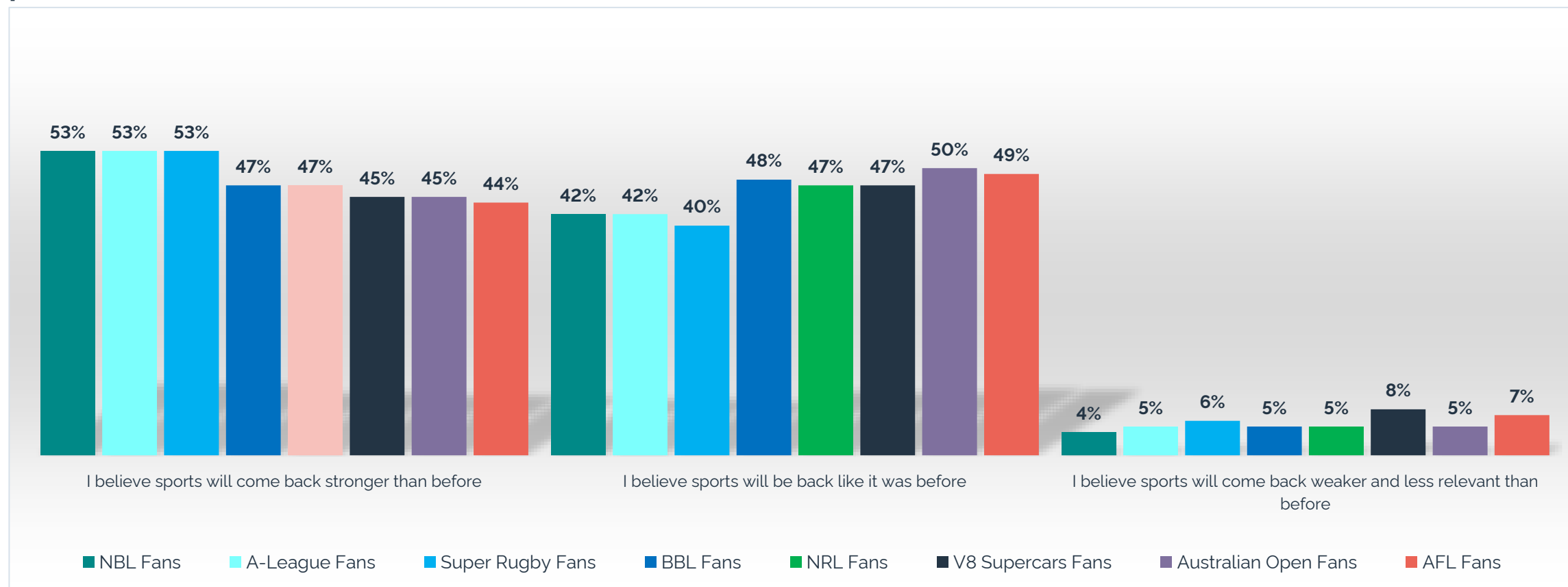
**Sports fans are optimistic about how sport will look post Covid-19.**

**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

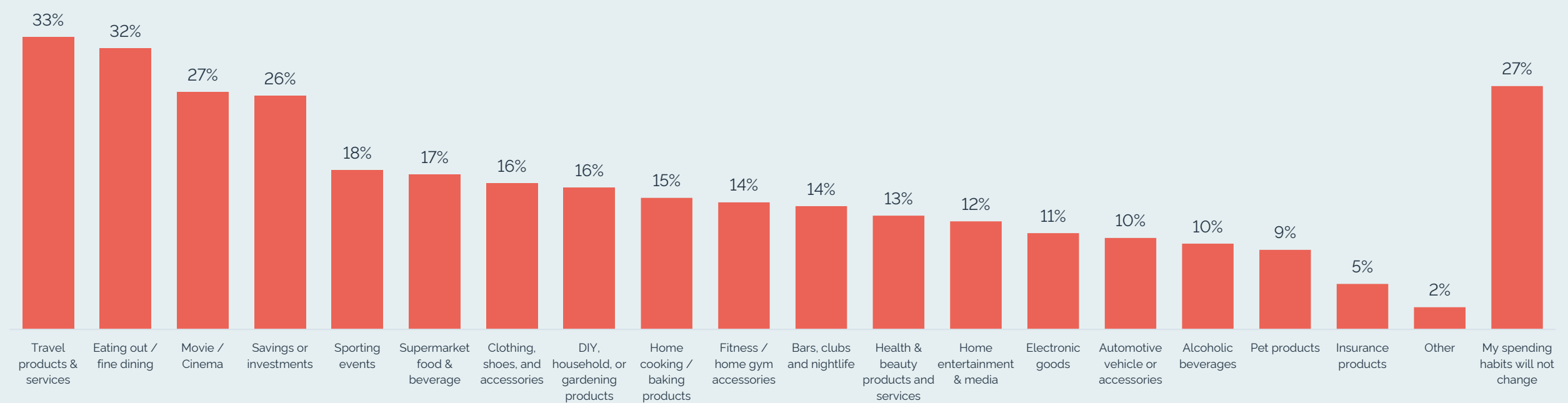
Across all major Australian leagues most fans within each code believe that sport will return stronger, or at least to the same levels as pre Covid-19. NBL and A-League fans are the most optimistic for how sport will look post Covid-19.



# 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)



# Statements on Covid-19 and sport

**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%**

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

**32%**

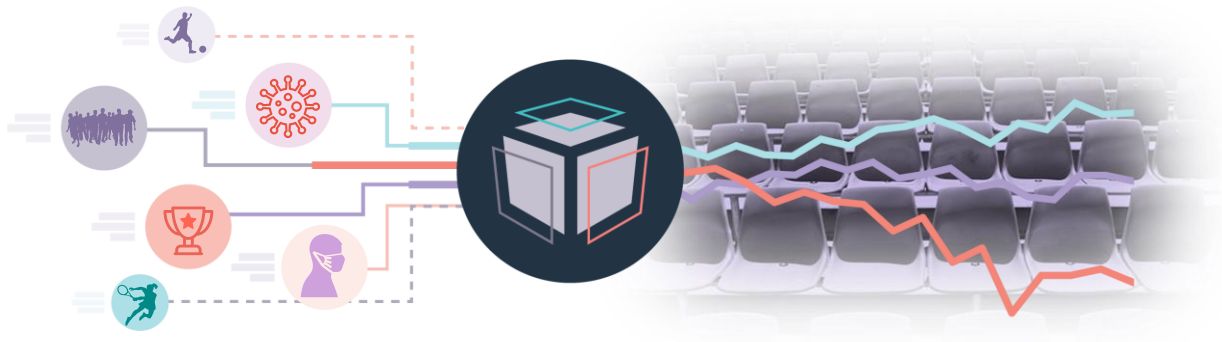
When Covid-19 ends I will be more likely to take up membership of my favourite sports teams to show support.

**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%



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## Methodology and sample

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# 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.

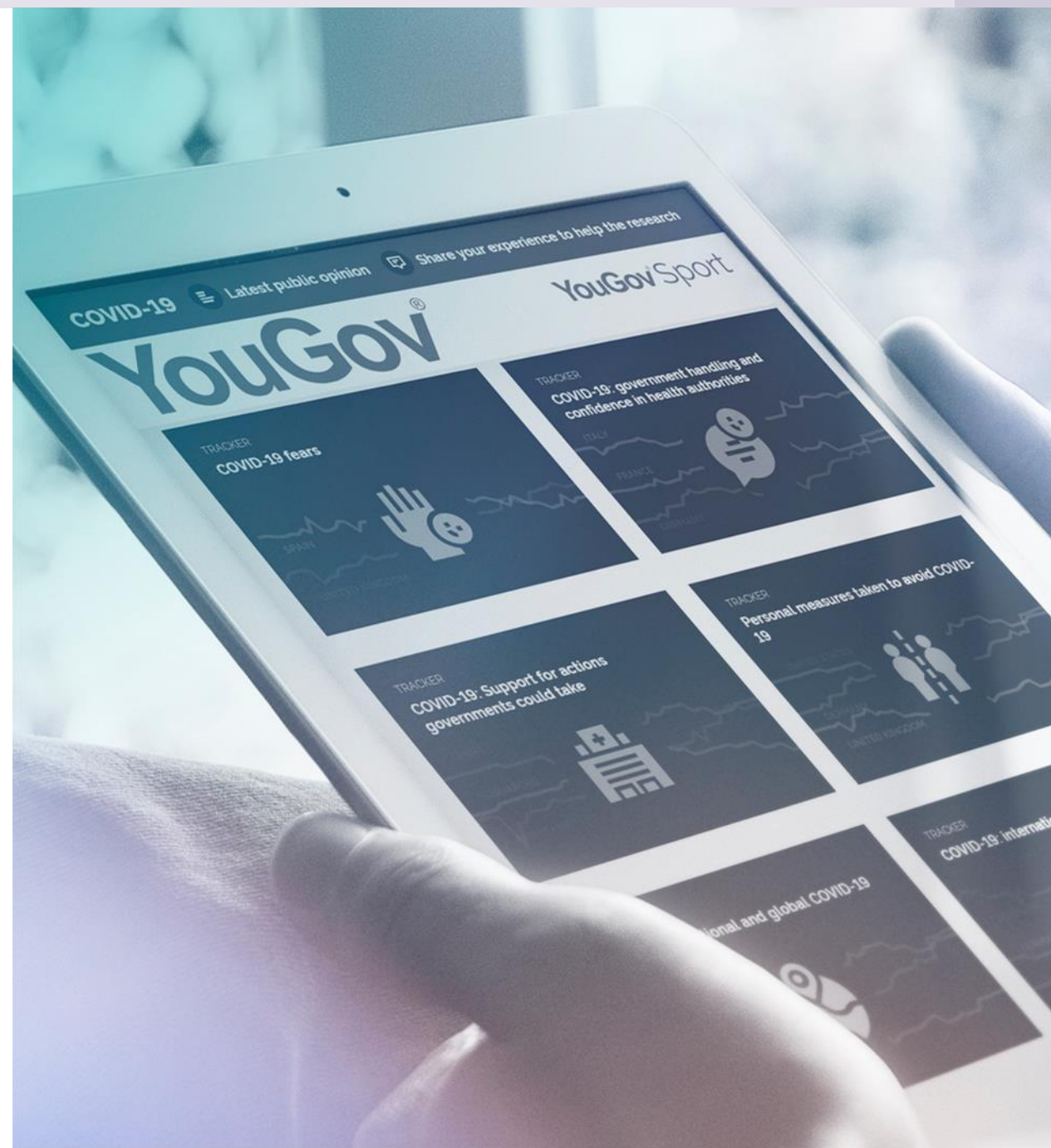
## Who did the project target?

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?

<b>Avid Fans</b>	One of my top interests.
<b>Core Fans</b>	One of my top interests OR Somewhat interested (combined).
<b>General Fans</b>	One of my top interests OR Somewhat interested OR A little bit interested (combined).
<b>Sports League Fans</b>	One of my top interests OR Somewhat interested in specific sports league (combined).





# Sample

**Avid Sports Fans** n=583

**Core Sports Fans** n=1,234

**General Sports Fans** n=2,000

**AFL Fans** n=953

**A-League Fans** n=445

**Australian Open Fans** n=881

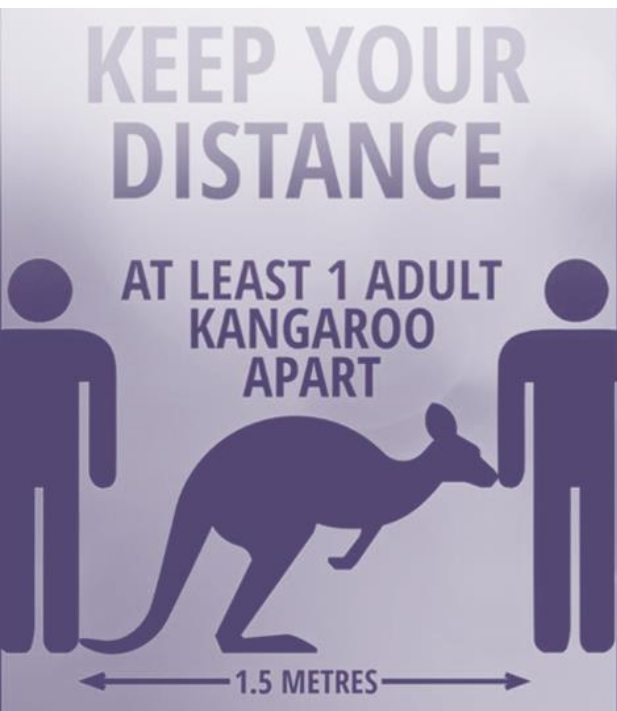
**BBL Fans** n=690

**NBL Fans** n=353

**NRL Fans** n=684

**Super Rugby Fans** n=369

**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

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## 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

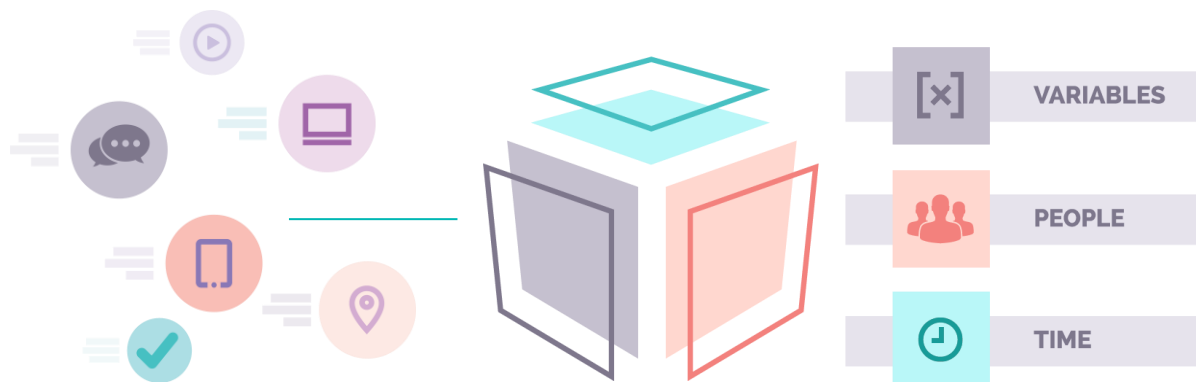


## 2) MEDIA SERVICES

- > 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.



**Best panel, best data, best tools**

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

## Daily Tracking of ...

700+ Australian & Global Brands  
70+ Australian and Global Sports  
60+ Australian Sports Clubs



## Sports & Brand Categories Surveyed

18

## Sports Surveys Annually



16k+

## Australian Panel



120k+

## AU Panellist Data Variables



1,200+

## Australian Offices > Sydney > Melbourne



Employees Australia

23





# Contacts

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**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' wish-lists (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\*)

# YouGov<sup>®</sup>Sport

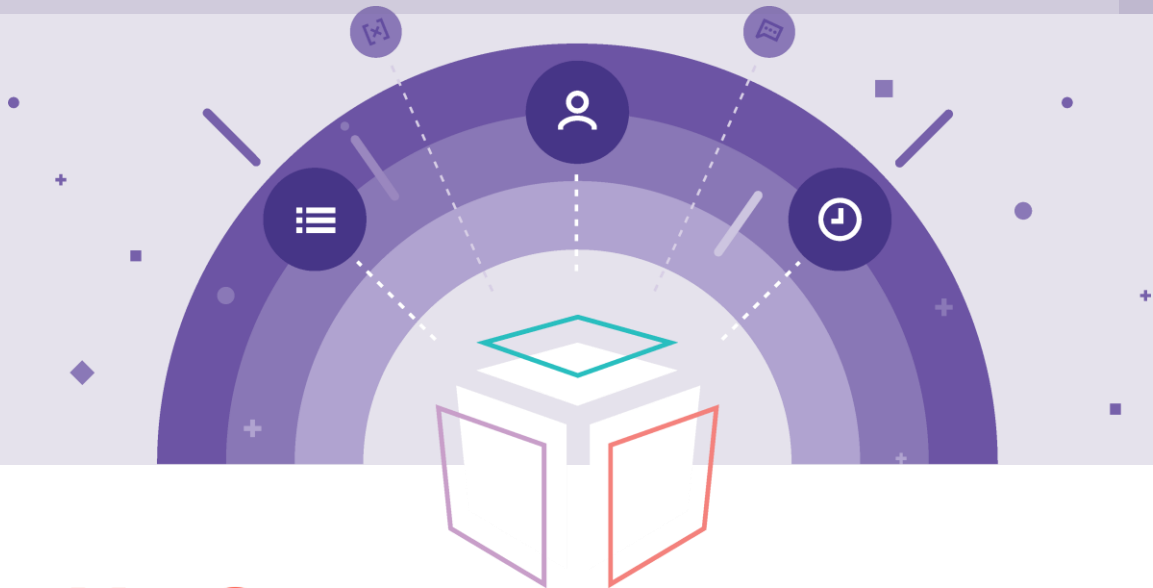
We are a global sports, sponsorship and entertainment research company, working with the industry's key players to unlock meaningful, actionable insights.



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