
Attitudes of Leadership Groups Toward Corporate Sponsorship of Professional Sports Events

Draft

Conducted for:
**American Coalition for Entertainment
and Sport Sponsorship**

Conducted by:
The Roper Organization, Inc.



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INTRODUCTION AND METHODOLOGY

The survey reported here was undertaken by The Roper Organization on behalf of the American Coalition for Entertainment and Sport Sponsorship (ACCESS) to ascertain the attitudes of several leadership groups toward advertising at and corporate sponsorship of professional sports events.

Leadership groups, as defined by ACCESS, included (1) team owners and top management, (2) sports facility owners, (3) sports event management, and (4) business associations (state restaurant associations and chambers of commerce). Lists were provided by ACCESS from which samples of respondents were drawn in a statistically random manners. Interviewing was conducted among 254 respondents, distributed as follows:

Team owners and top management	25
Sports facility owners	28
Sports event management	76
Business associates	125

As these sample sizes represent differing proportions of their respective populations (defined as the organizations included on the lists provided), the overall sample was statistically weighted so that no individual group would have a disproportionate effect on the total results.

The survey was conducted from April 25 to May 14, 1993, by way of telephone interviews from The Roper Organization's central telephone interviewing facility.

The questionnaire was developed by The Roper Organization based on discussions with representations of ACCESS regarding the issues and areas of information of interest.

Throughout the report results are shown primarily for the total leadership groups (254 interviews), as the individual groups are too small for reliable analysis. Now and then, however, mention is made of individual group results when there is a finding of particular significance.

Occasionally, comparative reference is made to the attitudes of the general public and sports enthusiasts. These data come from a national telephone survey of 1,252 adults, including 504 sports enthusiasts, conducted for ACCESS by The Roper Organization from March 15-28, 1993.

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SUMMARY OF RESULTS

Importance of Corporate Sponsorship

Overwhelmingly, leadership groups regard corporate sponsorship as an important source of money for professional sports (88%). Further, corporate advertising or sponsorship is cited as the source that provides the most money by two-thirds of leadership groups, far outdistancing ticket sales (22%) or licensing fees (6%).

Government contributions not only provide little financial support, but such support is viewed as inappropriate.

Many types of corporate advertising or sponsorship are seen as important both to the overall success of a sports event and with respect to attracting sponsorship. Ranking high in both areas are "advertising or promotional activities leading up to the event," "sponsorship of a tournament or game that is named after the sponsor", and "company logos or names on racing cars, boats, etc."

The Kind of Sponsoring Company

Almost two-thirds of leadership groups say there are no kinds of companies that they personally feel should not be allowed to sponsor sports events. The only kinds of companies cited to any noticeable degree are tobacco companies (14%) and alcoholic beverage companies (13%).

As to what groups currently exert the most influence on the types of sponsoring companies, leadership groups name TV networks and stations (91%) and sports facility owners and operators (88%) by a wide margin. Also, these are the groups singled out as the ones that should have the most

influence on what products or service are advertised at professional sports events. Social advocacy groups and all levels of government are strongly rejected as desirable sources of influence.

Most leadership groups (71%) report no harm or problems to date from existing restrictions or corporate sponsorship, but most (55%) believe more restrictions are likely in the near future.

Economic Impact of Containment of Corporate Sponsorship

If corporate sponsorship was significantly curtailed, leadership groups foresee a number of detrimental effects, namely:

- a substantial increase in ticket prices, resulting in a decrease in attendance and concession spending;
- a considerable decrease in revenues for facility owners;
- a considerable decrease in revenues for team owners and management;
- fewer sports events on network TV;
- a serious economic impact on host communities.

Economic Impact of Tax Law Changes

Reducing or eliminating tax deductions for corporate advertising is seen as substantially reducing corporate sponsorship of sports events.

Reducing or eliminating tax deductions for corporate entertainment expenses is seen as having a negative impact on both attendance at sports events and concession spending.

Actions to Combat Restrictions on Corporate Sponsorship

Very few leadership groups (10%) report awareness of organized actions to combat restrictions and only 3% have been involved personally.

Further, fewer than half (38%) express a willingness to be active in such organized efforts.

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I. CORPORATE SPONSORSHIP AS A SOURCE OF MONEY

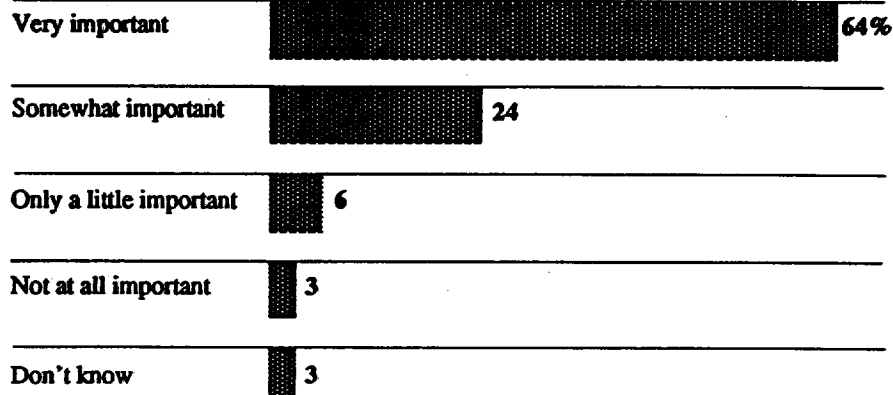
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Overwhelmingly, leadership groups regard corporate sponsorship of sports events as an important source of money.

Almost two-thirds of leadership groups (64%) say corporate sponsorship is a very important sources of money and another fourth (24%) say it is a somewhat important source.

Only about one leader respondent in ten (9%) is of the view that corporate sponsorship is of little or no financial importance - and virtually all of these respondents come from business associations.

Importance of Corporate Sponsorship on a Source of Money [Q.1]



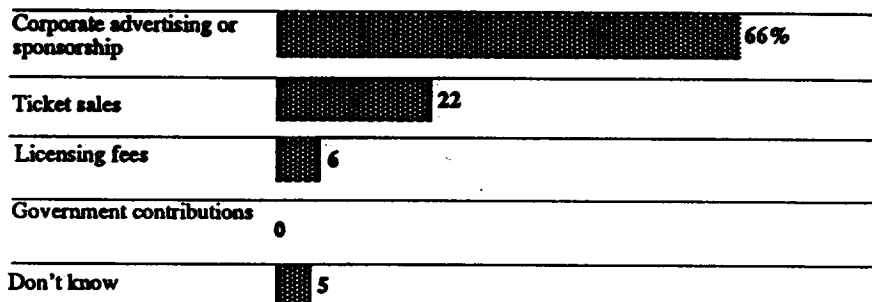
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Further, corporate advertising or sponsorship is cited, by far, as the source that provides the most money for professional sports.

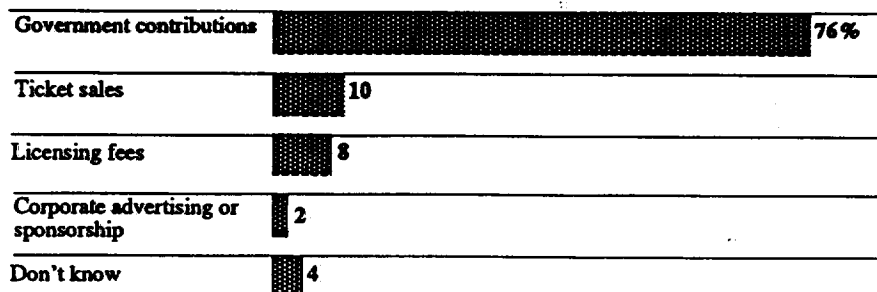
Of four sources of money for professional sports, corporate advertising or sponsorship is singled out, by a large margin, as the one that provides the most money - cited by two - thirds of the leadership groups. Team owners and facility owners, however, are more inclined to credit ticket sales as the most important source of money - 50% and 57%, respectively.

Standing out as the source that provides the least money is government contributions.

Sources that Provide the Most Money for Professional Sports [Q.2]



Sources that Provide the Least Money for Professional Sports [Q.3]



Not only are government contributions regarded as a very minimal source of money, the large majority of leadership groups regard government involvement in supporting professional sports as inappropriate.

The general public and sports enthusiasts hold this view to the same degree.

**Government Promotion and Sponsorship of Professional Sports
[Q.4]**

Appropriate

16%

Inappropriate

82

Don't know

2

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II. IMPORTANCE OF VARIOUS TYPES OF CORPORATE AD- VERTISING OR SPONSORSHIP

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Many types of corporate advertising or sponsorship are seen as important to the overall success of a sports event.

Of ten ways that companies can advertise or sponsor a sports event, nine are regarded as "very" or "somewhat" important by three-fourths or more of leadership groups. Only "company brochures distributed at a game or event" is an approach considered important by fewer than half (45%) of the leader respondents.

"Advertising or promotional activities leading up to the event" stands out as an approach that is especially important to the overall success of a sports event - being cited as very important by 72%.

The only other approach evaluated as very important by at least two-thirds of the leadership groups is "sponsorship of a tournament or game that is named after the sponsor."

See following page for complete ratings.

Importance of Various Types of Corporate Advertising or Sponsorship to the Overall Success of a Sports Event [Q.14]

	<u>Very Important</u>	<u>Somewhat Important</u>	<u>Not very Important</u>	<u>Not at all Important</u>
Advertising or promotional activities leading up to the event	72%	24	2	1
	96%		3	
Special events at a stadium or arena sponsored by a company, such as fan photo night or banner day, etc.	55%	39	8	1
	94%		9	
Sponsorship of a tournament or game that is named after the sponsor	66%	23	8	3
	89%		11	
Company logos or names on racing cars, boats, etc.	54%	30	11	4
	84%		15	
Special promotion held at local restaurants, hotels, bars, retail stores, etc. in conjunction with a specific sports event	36%	47	13	4
	83%		17	
Promotional items given away at events with the company logo or names, such as caps, coolers, etc.	50%	32	14	3
	82%		17	
Signs in sports stadiums	49%	31	11	8
	80%		19	
Company logos or names on athlete's clothing, such as a logo on a tennis player's shirt or the jacket of a race car driver	49%	27	14	10
	76%		24	
Advertising on the cups, plates, etc., for beverages or food sold at a game or event	27%	40	24	9
	67%		33	
Company brochures distributed at a game or event	18%	30	32	20
	48%		52	

With respect to attracting sponsorship for a sports event, all the approaches evaluated are regarded as important by sizeable majorities of leadership groups.

The same 10 approaches to corporate advertising or sponsorship also were evaluated in terms of their importance in attracting sponsorship for a sports event. All are regarded as at least somewhat important by at least two-thirds of leadership groups.

Three approaches stand out in terms of being rated very important. They are:

Sponsorship of a tournament or game that is named after the sponsor	82%
Company logos or names on racing cars, boats, etc.	73%
Advertising or promotional activities leading up to the event	68%

See following page for complete ratings.

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Importance of Various Types of Corporate Advertising or Sponsorship With Respect to Attracting Sponsorship for a Sports Event [Q.15]

	Very Important	Somewhat Important	Not very Important	Not at all Important
Sponsorship of a tournament or game that is named after the sponsor	82% 96%	14	3 4	1
Advertising or promotional activities leading up to the event	68% 96%	28	3 3	*
Special events at a stadium or arena sponsored by a company, such as fan photo night or banner day, etc.	62% 96%	34	2 4	2
Promotional items given away at events with the company logo or names, such as caps, coolers, etc.	58% 95%	37	4 4	*
Signs in sports stadiums	62% 90%	28	7 9	2
Company logos or names on racing cars, boats, etc.	73% 89%	16	7 9	2
Company logos or names on athlete's clothing, such as a logo on a tennis player's shirt or the jacket of a race car driver	65% 86%	21	8 12	4
Special promotion held at local restaurants, hotels, bars, retail stores, etc. in conjunction with a specific sports event	46% 84%	38	11 14	3
Advertising on the cups, plates, etc., for beverages or food sold at a game or event	44% 81%	37	14 19	5
Company brochures distributed at a game or event	31% 66%	35	20 33	13

* Less than 0.5%

III. SPORTS SPONSORSHIP BY SPECIFIC TYPES OF COMPANIES

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When asked if there should be any companies that should not be allowed to sponsor sports events, the majority of leadership groups says "no."

Leadership groups were asked three questions about the sponsorship of events by type of company: (1) are any kinds of companies prohibited from advertising on television during a professional sports program, (2) are any kinds of companies not allowed to sponsor sports events at sports stadiums and arenas, and (3) are there any kinds of companies that should not be allowed to sponsor sports events.

Six leader respondents in ten (61%) are aware that companies that manufacture cigarettes and other tobacco products cannot advertise on television during a sports event and 13% say these companies are not allowed to sponsor sports events at stadiums and arenas.

As to what kinds of companies they personally feel should not be allowed to sponsor sports events, over six in ten (64%) say none. Most frequently cited as types of companies that should not be allowed to sponsor are tobacco companies (14%) and alcoholic beverage companies(13%).

See following page for complete results.

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Types of Companies and Sponsorship of Sports Events

Total Leadership Groups

	Companies prohibited from advertising on television during a professional sports event (Q6)	Companies not allowed to sponsor sports events at stadiums and areans (Q7)	Companies that should not be allowed to sponsor sports events (Q8)
Companies that manufacture cigarettes; tobacco products	61%	13%	14%
Companies that distill alcoholic beverages	21	7	13
Companies that brew beer	3	2	5
Sexually explicit, pornographic, adult entertainment	1	1	2
Personal products	*	*	1
Anything that sets a bad example, negatively influences young people	-	*	1
None	19	55	64
Don't know	10	26	7

* less than 0.5%

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Leadership groups overestimate public concern about the types of companies that sponsor sports events.

Leadership groups were asked whether they think the public believes there are any kinds of companies that should not be allowed to sponsor sports events.

30% say they believe the public would be opposed to sponsorship by tobacco companies, and 28% hold this view of public opinion with respect to alcoholic beverage companies.

Actually, however only 19% of the general public say tobacco companies should not be allowed to sponsor sports events, and 17% oppose sponsorship by alcoholic beverage companies.

Also, leadership groups were asked how they believe sports fans feel about this issue. Here the leadership groups are closer to the opinion of sports enthusiasts. If anything, leader respondents tend to underestimate the opposition of sports enthusiasts to sponsorship by tobacco and alcoholic beverage companies.

See following page for complete comparisons.

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Types of Companies that Should Not Be Allowed to Sponsor Sports Events

	Leadership groups perception of how the public feels (Q13)	Opinion of general public**	Leadership groups perception of how sports fans feel (Q13a)	Opinion of Sports enthusiasts**
Companies that manufacture cigarettes; tobacco products	30%	19%	13%	18%
Companies that distill alcoholic beverages	28	17	10	16
Companies that brew beer	10	11	3	10
Sexually explicit, pornographic, adult entertainment	1	2	1	2
Gun manufacturers; firearms	1	1	*	1
Personal products	*	1	1	1
Anything that sets a bad example, negatively influences young people	1	1	1	*
None	46	57	74	58
Don't know	11	11	7	9

* less than 0.5%

** National telephone survey of 1,252 adults, including 504 sports enthusiasts conducted for ACCESS March 15-24, 1993.

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As to what groups currently have the most influences on the types of companies that sponsor professional sports events, leadership groups cite TV networks and stations and sports facility owners and operators by a wide margin.

Of six groups that might influence who sponsors professional sports events, 75% of leader respondents say the TV networks and stations that televise sports events now have a "great deal" of influence, and 60% say owners and operators of sports facilities have this level of influence.

The majority of leadership groups discount the influence of social advocacy groups and government at all levels.

Influence Various Groups Currently Have on the Types of Companies that Sponsor Professional Sports Events [Q.9]

	Great Deal	Fair Amount	Only a Little	None
TV networks and stations that televise sports events	75% 16		4 2	
	91%		6	
Owners and operators of the sports facility	60% 28		9 1	
	88%		10	
Social advocacy groups	8% 32		42 12	
	40%		54	
Local governments	12% 27		41 16	
	39%		57	
State governments	8% 29		47 12	
	37%		59	
Federal government	11% 24		44 18	
	35%		62	

Likewise, sports facility owners and operators and TV networks and stations that televise sports events are singled out as the groups that should have the most influence as to what products or services are advertised at professional sports events.

Social advocacy groups and all levels of government are strongly rejected as groups that should influence sports event advertising.

The opinions of the general public and sports enthusiasts closely parallel those of leadership groups.

Influence Various Groups Should Have About What Products or Services are Advertised At Professional Sports Events [Q.10]

	Great Deal	Fair Amount	Only a Little	None
Owners and operators of the sports facility	58%	29	9	1
	87%		10	
TV networks and stations that televise sports events	35%	40	17	6
	75%		23	
Local governments	5%	33	36	23
	38%		59	
State governments	2%	24	37	34
	26%		71	
Social advocacy groups	5%	21	35	34
	26%		69	
Federal government	2%	16	37	43
	18%		80	

Very few leader respondents report any harm or problems to date from existing restrictions on corporate sponsorship of professional sports events.

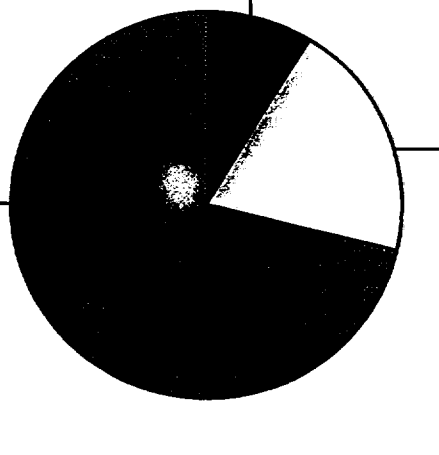
Seven leader respondents in ten say that current restrictions on corporate sponsorship have not been much of a problem. Fewer than one in ten is aware of any harm.

Effect to Date of Existing Restrictions on Corporate Sponsorship [Q.11]

Has been harm (9%)

Not a problem so far (71%)

Don't know (20%)



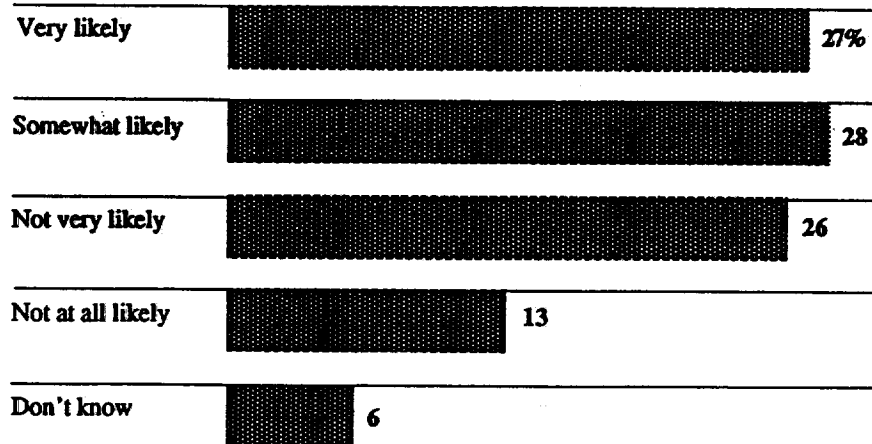
Those who said there has been harm from existing restrictions on corporate sponsorship (only 24 respondents) were asked what they personally have experienced and what problems they have heard of beyond their personal experience. Most often mentioned are:

- Sponsorship has been eliminated or limited; trouble finding sponsors
- Revenue has been lost or reduced; events need to find new revenue sources
- Events are being jeopardized, as they are limited in what they can do

A majority of leadership groups believe it is likely that there will be additional restrictions on corporate sponsorship at professional sports in the near future.

Just over half (55%) of all leader respondents believe there will be more restrictions in the next two years or so. Among business associations the figure is 52%, but among the other leadership groups the figure ranges from 60% to 74%.

Likelihood that There Will Be Additional Restrictions on Corporate Sponsorship [Q.12]



Most often mentioned as an anticipated restriction is some kind of further restriction or ban on tobacco and/or alcoholic beverage advertising or sponsorship. A few leader respondents mention the possibility of reducing or eliminating the tax deductibility of corporate sponsorship.

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IV. ECONOMIC IMPACT OF CURTAILMENT OF CORPORATE SPONSORSHIP

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There is substantial agreement among leadership groups that the curtailment of corporate sponsorship of professional sports events would likely have numerous detrimental effects.

Leadership groups were asked how likely they thought it might be that each of five outcomes would occur if corporate sponsorship of professional sports events was curtailed significantly. Overwhelmingly they believe it is at least somewhat likely that all might happen, and in every instance a majority believe it is very likely.

Thus, the likelihood of a serious economic impact is foreseen as the result of a curtailment of corporate sponsorship, to wit:

- a substantial increase in ticket prices,
- a considerable decrease in revenues for facility owners,
- a considerable decrease in revenues for team owners and management,
- fewer sports events on network TV,
- detrimental effects on the economies of communities where sports events are held.

Likelihood of Possible Effects if Corporate Sponsorship of Professional Sports Events Was Significantly Curtailed [Q.16]

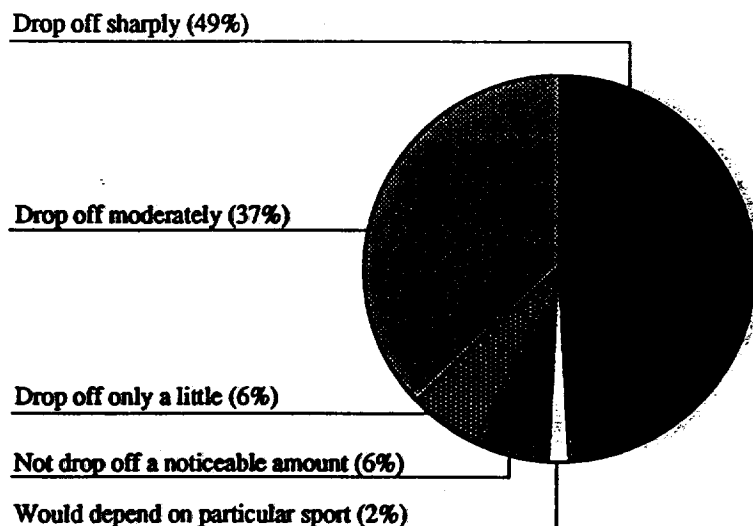
	<u>Very Likely</u>	<u>Somewhat Likely</u>	<u>Not very Likely</u>	<u>Not at all Likely</u>
There would be a substantial increase in ticket prices	81%	12	5	1
	93%		6	
There would be a considerable decrease in revenues for facility owners	74%	17	4	3
	91%		7	
There would be a considerable decrease in revenues for team owners and management	71%	19	5	3
	90%		8	
There would be fewer sports events on network TV and more on cable channels such as ESPN, TNT, and Sports Channels	68%	18	4	3
	86%		7	
There would be a seriously detrimental effect on the economies of the communities where sports events are held	52%	32	9	5
	84%		14	

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Unquestionably, most leadership groups believe that a substantial ticket price increase would reduce attendance.

Half the leader respondents believe attendance would drop off sharply with a substantial ticket price increase, and another 37% say there would be a moderate drop off. Only 2% foresee no reduction in attendance.

Effect of Substantial Ticket Price Increase on Attendance [Q.17]



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Most leadership groups also expect a substantial ticket price increase to result in less concession spending by those who do attend.

Almost four leader respondents in ten (38%) say those attending a sports event would spend considerably less if ticket prices were substantially higher, while another three in ten expect somewhat of a reduction in spending.

Effect of Substantial Ticket Price Increase on Concession Spending [Q.18]

Spend considerably less (38%)

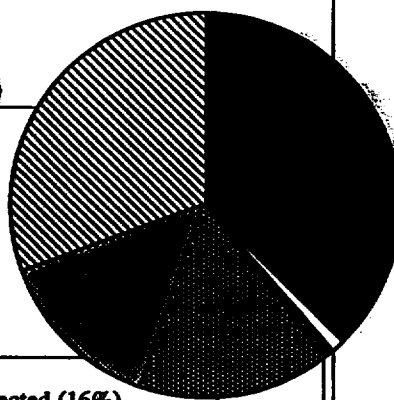
Spend somewhat less (31%)

Spend a little less (14%)

Concession spending not affected (16%)

Depends on concession (vol.) (1%)

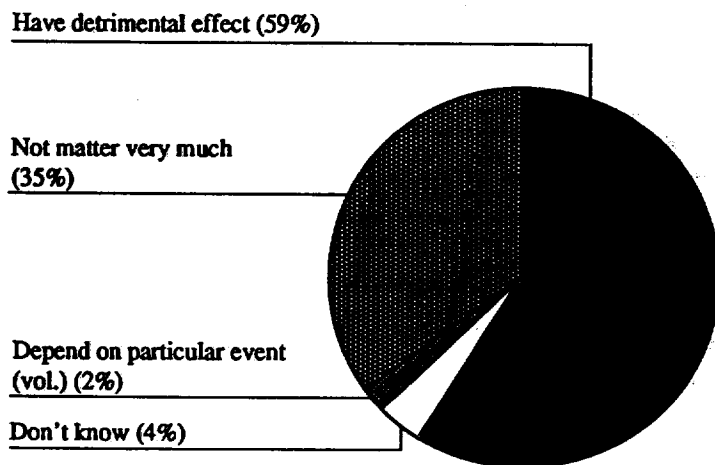
Don't know (1%)



If more sports events were televised on cable channels instead of network TV, resulting in fewer people watching, the majority of leadership group believe the decreased visibility would have a detrimental effect on the sports industry.

Six leader respondents in ten are of the opinion that if a shift in television coverage of sports events from network TV to cable resulted in less visibility, the sports industry would suffer. Just over a third (35%) say this circumstance would not matter very much to the sports industry.

Effect on Sports Industry of More Sports Events on Cable Channels Rather Than Network TV [Q.19]



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The economic benefits of professional sports events to the communities where they are held is well recognized.

While leadership groups mention a variety of benefits derived by communities where sports events are held, economic benefits stand out sharply.

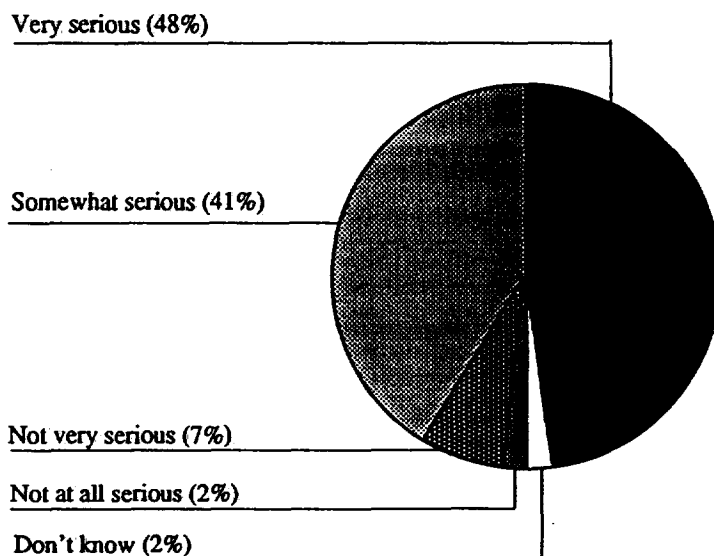
Most Important Benefits Derived by Communities In and Around Which Professional Sports Events Are Held [Q.5]

Economic benefits (net)	83%
Increases area's general business traffic and sales	26%
Helps economy overall	25
Increases tourism	19
Provides employment	15
Increases tax revenues; expand tax base	14
Brings in outside dollars	8
Creates ancillary spending—hotels, restaurants, etc.	7
Attracts new business to area	1
Provides entertainment to residents	13
Events engender a sense of civic pride	10
Provides publicity/exposure for area	10
Events enhance quality of life in area	6
Provides name recognition for area	6
Provides funds for local charities	6
Events bring about community involvement	5
Gives area prestige	4
Events provide activity for youth	2
No benefits/cost outweighs benefits	3

A significant curtailment of corporate sponsorship of sports events, therefore, would be expected to have a serious financial impact on the host communities.

Almost half (48%) the leadership groups believe the financial impact would be very serious and another four in ten (41%) say there would be a moderately serious impact.

Seriousness of Financial Impact on Sports Event Communities of Corporate Sponsorship Curtailment [Q.25]



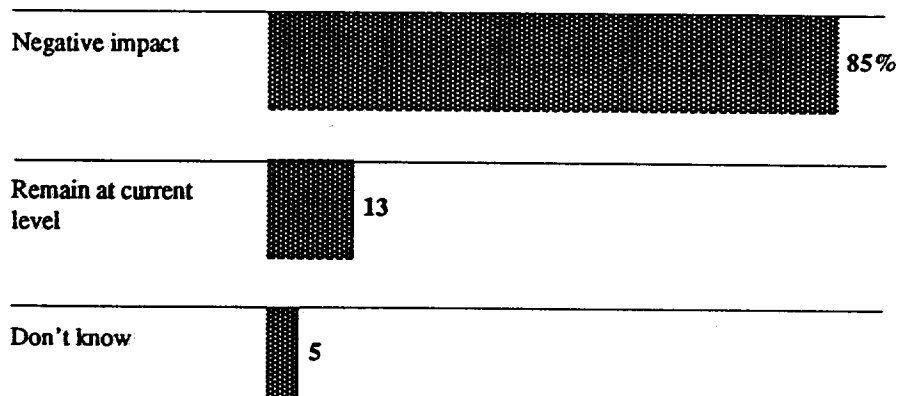
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V. ECONOMIC IMPACT OF TAX LAW CHANGES

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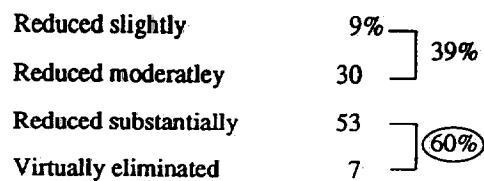
Reducing or eliminating tax deductions for corporate advertising would have a negative impact on corporate sponsorship of sports events, according to the large majority of leadership groups.

Impact on Corporate Sponsorship of Reducing or Eliminating Tax Deduction for Corporate Advertising [Q.20]



And the majority of those who foresee a negative impact believe corporate sponsorship would be reduced substantially or virtually eliminated.

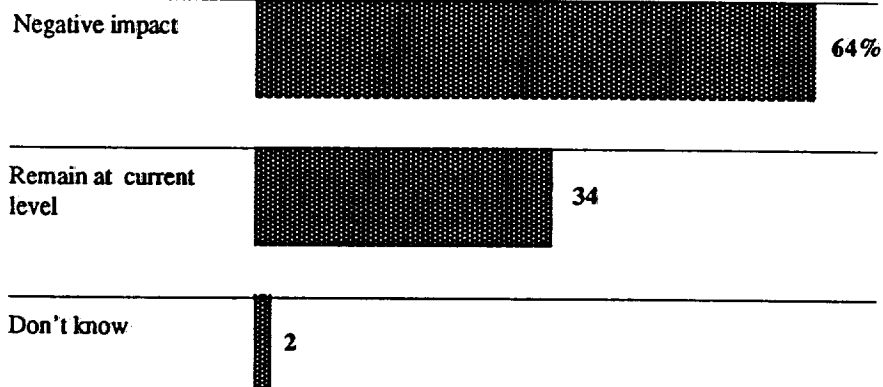
The negative impact of reducing or eliminating tax deductions for corporate advertising means that corporate sponsorship of sports would be... [Q.20a]



(Base: Those who say there would be a negative impact from reducing or eliminating tax deductions for corporate advertising = 216)

Reducing or eliminating tax deductions for corporate entertainment expenses is seen by a majority of leadership groups as having a negative impact on attendance at sports events.

Impact on Attendance at Sports Events of Reducing or Eliminating Tax Deduction for Corporate Entertainment Expenses [Q.21]



And three-fourths of those who foresee a negative impact on attendance believe there would be either a moderate (50%) or a substantial (24%) drop off.

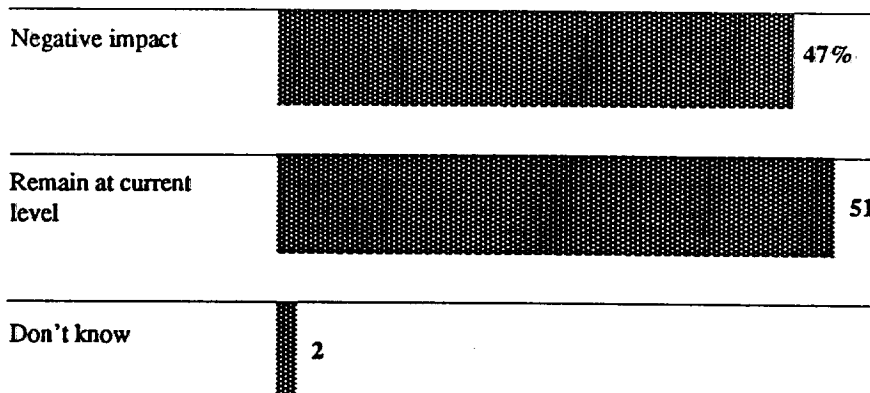
The negative impact of reducing or eliminating tax deductions for corporate entertainment expenses means that attendance at sports events would... [Q.21a]

Drop off slightly	25%
Drop off moderately	(50)
Drop off substantially	24

(Base: Those who say there would be a negative impact from reducing or eliminating tax deductions for corporate advertising = 162)

Fewer than half of leadership groups say that reducing or eliminating tax deductions for corporate entertainment expenses would have a negative impact on concession spending.

Impact on Concession Spending of Reducing or Eliminating Tax Deduction for Corporate Entertainment Expenses [Q.22]



And 70% of those who foresee a negative impact on concession spending believe there would be either a moderate (49%) or substantial (21%) drop off.

The negative impact of reducing or eliminating tax deductions for corporate entertainment expenses means that spending at concessions would... [Q.22a]

Drop off slightly	31%
Drop off moderately	(49)
Drop off substantially	21

(Base: Those who say there would be a negative impact from reducing or eliminating tax deductions for corporate advertising = 120)

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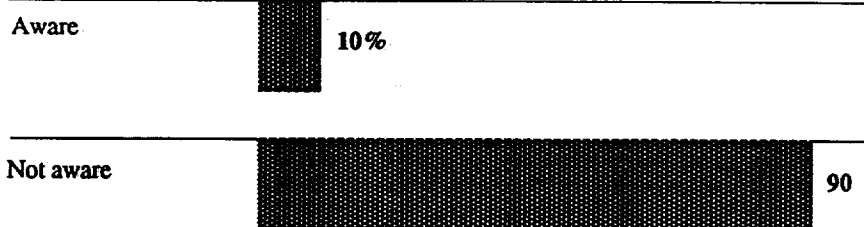
**VI. ACTIONS TO COMBAT
RESTRICTIONS ON
CORPORATE SPONSORSHIP**

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There is very little awareness of any actions that have been taken to organize against or combat restrictions on corporate sponsorship of professional sports.

Only one leader respondent in ten claims awareness of any organized actions taken by any group to combat restrictions on corporate sponsorship.

Awareness of Organized Actions Taken by Any Group to Combat Restrictions on Corporate Sponsorship [Q.23]

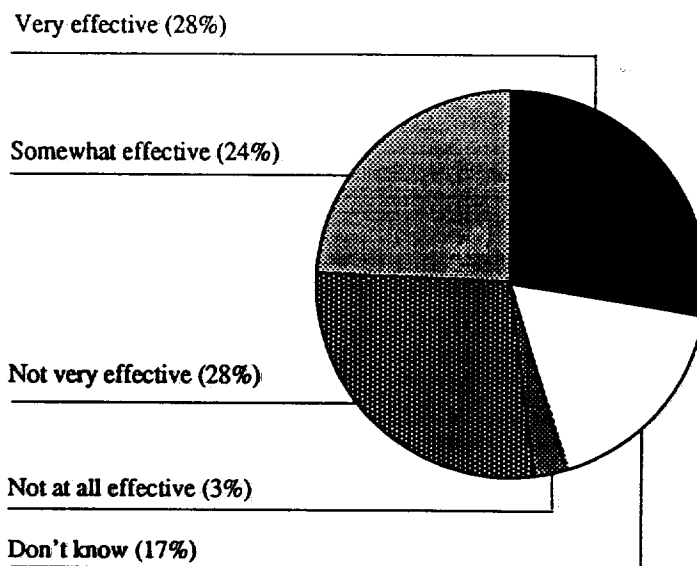


Of the very few (24) who are aware of any actions, they primarily mention unspecified lobbying to fight restrictions (11 mentions). No particular group is cited as being involved by more than three leader respondents.

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Among the very few leader respondents who are aware of any actions to combat restrictions on corporate sponsorship, the majority say the actions have been at least somewhat effective.

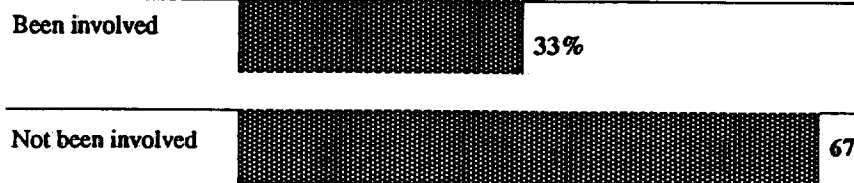
Effectiveness of Organized Actions Taken to Combat Restrictions on Corporate Sponsorship [Q.23b]



(Base: Those aware of organized actions to combat restrictions = 24)

A third of those who say they are aware of actions to combat restrictions say they have been personally involved—but this is only 3% of all leader respondents.

Personal Involvement in Organized Actions to Combat Restrictions on Corporate Sponsorship [Q.23c]



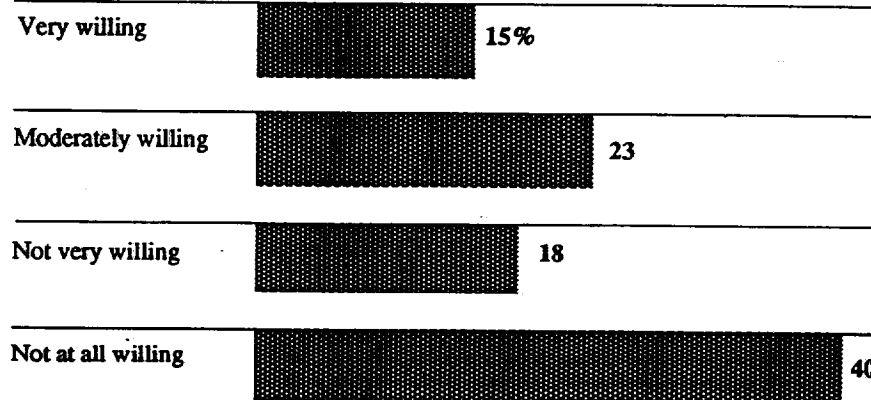
(Base: Those aware of organized actions to combat restrictions = 24)

Overall, fewer than four leader respondents (38%) in ten say they would be willing to play an active role in organized actions to combat new or upcoming restrictions.

With respect to the willingness to be involved personally in organized activity to fight against restrictions on corporate sponsorship, there is a distinct difference in opinion between business association and other groups.

Among business groups only 34% express a willingness to be active, while six in ten of team owners and management, facility owners, and the sports event management community say their are willing to play an active role.

Willingness to Play Active Role in Organized Actions to Combat Restrictions on Corporate Sponsorship [Q.24]



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The very large majority of leadership groups report having heard or read nothing about a new fan consumer group called Sports Fans United.

A new activist group is being organized to deal with such consumer issues as cable access to sports events and high ticket prices. Obviously, Sports Fans United—as it is called—has received very little publicity, as only 2% of leadership groups say they have heard at east a fair amount about it.

Awareness of Sports Fans United [Q.26]

