



UNDERSTANDING FAN FEARS: A REVOLUTION OR ADJUSTMENT?

PRESENTED BY DIMENSIONAL INNOVATIONS AND PERSUASION STRATEGIES



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DIMENSIONAL INNOVATIONS



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PERSUASION STRATEGIES



ABOUT US

WE ARE

**Dimensional
Innovations**

ONE
TEAM

300
PEOPLE

26
YEARS

7
OFFICES

HQ - Overland Park, KS
Lenexa, KS
Atlanta, GA
Minneapolis, MN
Denver, CO
Gainesville, FL
Los Angeles, CA

200K
SQ. FT OF DESIGN
+ BUILD SPACE

Inc.
5000
5 YEARS RUNNING

WE ARE
INNOVATORS
FABRICATORS
ARCHITECTS
ENGINEERS
CODERS
DESIGNERS
ANIMATORS
WELDERS
PROJECT MANAGERS
PAINTERS
UX EXPERTS

who design + build + invent

experiences all over the world







May 11, 2020

AUTHORS

Corporate Defendants: Don't Fear the Post-Pandemic Jury Yet

Compared to nine months ago, jury eligible Americans in the second month of the coronavirus pandemic are more likely to say the government "very much" favors corporations over ordinary Americans. News reports of large corporations using CARES Act government aid while laying off workers could be leading to more anti-corporate reactions, helping to reawaken familiar narratives about corporate greed and callousness. Does this and other anti-corporate bias translate to scary times ahead for corporate defendants? Not necessarily. At least not yet.



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WHY WE'RE HERE

**THERE ISN'T REALLY A PRECEDENT, AND THEREFORE,
NO ONE KNOWS A DAMN THING.**





THIS IS NOT A TIME FOR TED TALKS AND PROGNOSTICATING.

THIS IS NOT A TIME TO PREY UPON FEAR AND SUGGEST SWEEPING CHANGES.

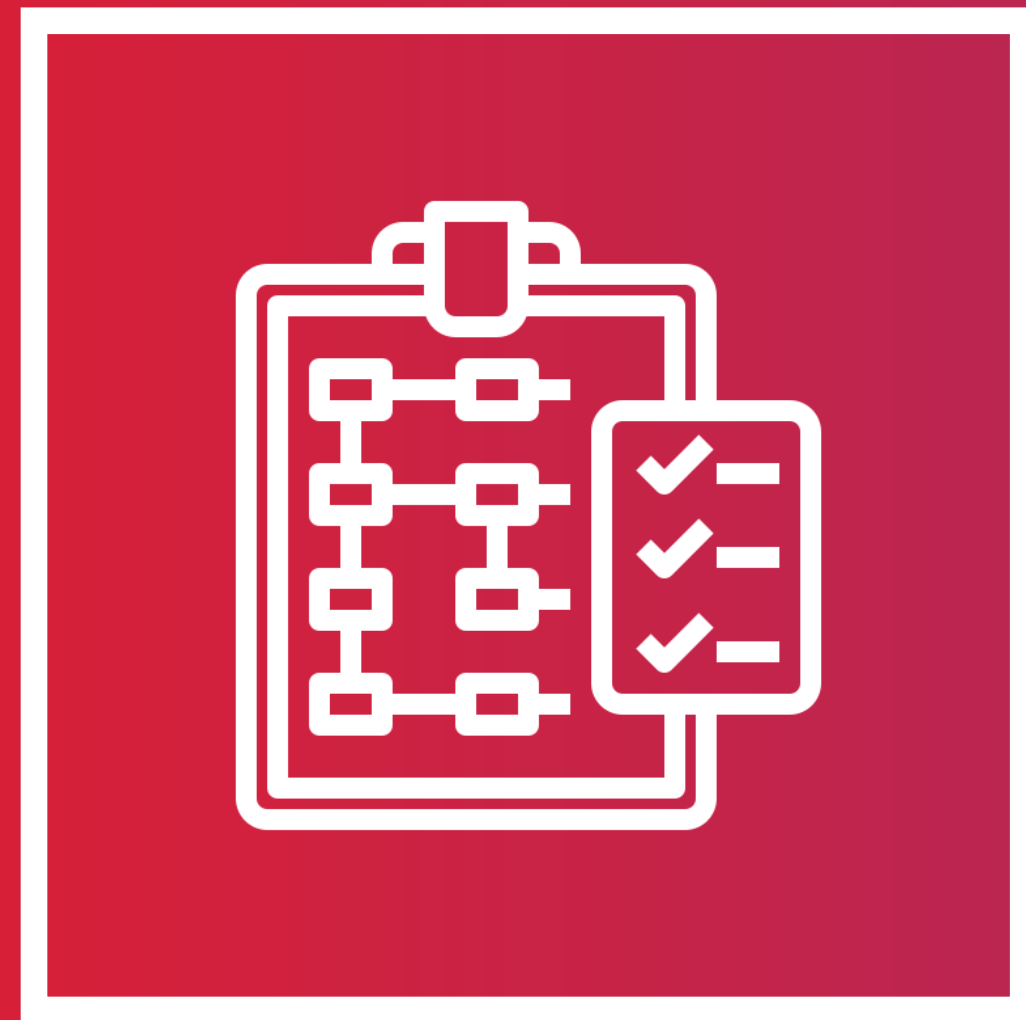
IT IS A TIME FOR EMPATHY.

IT IS A TIME FOR FACTS AND SCIENCE.

IT IS A TIME TO BE THOUGHTFUL.

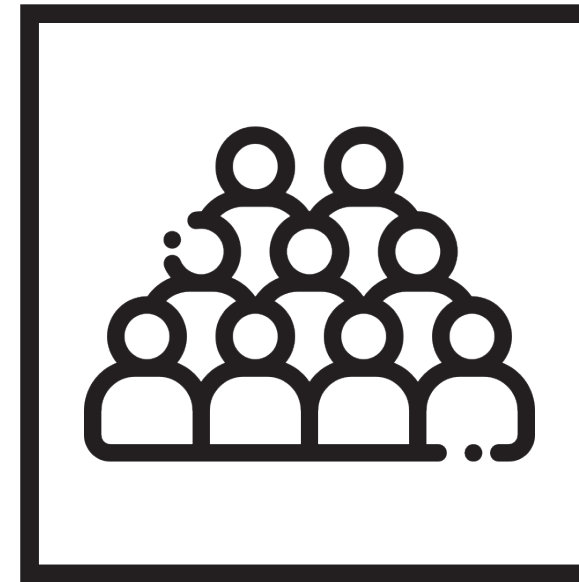
THE HYPOTHESIS

- ✓ When companies develop a product or service, a common pitfall is to get wrapped up in process and lose sight of the end user.
- ✓ Guidelines are a great example. They are a “minimum standard of care” based on the best medical and science information available, and are important, but don’t consider the underlying core value of our product, service or event.
- ✓ Because this is a new frontier, I’m not sure waiting to see what happens is a good plan. I believe we need to plan for the most complicated scenario for this season only and then pivot as the world changes. Think temporary, layered solutions NOT permanent.
- ✓ To do this, we start with the client/fan and not the regulations. Then, we reverse engineer.

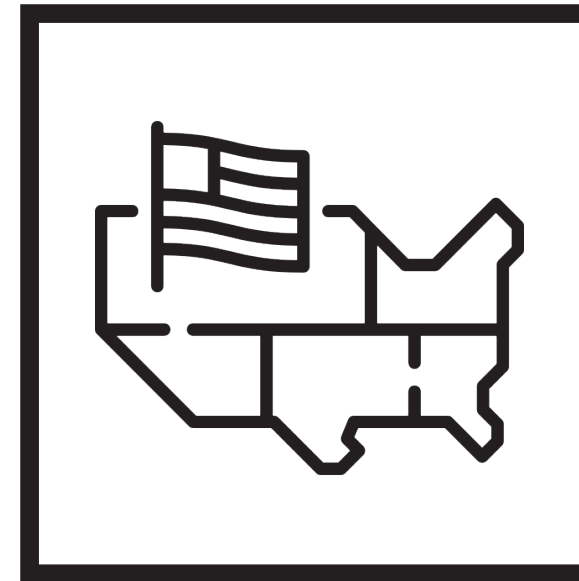


WHAT WE'VE DONE

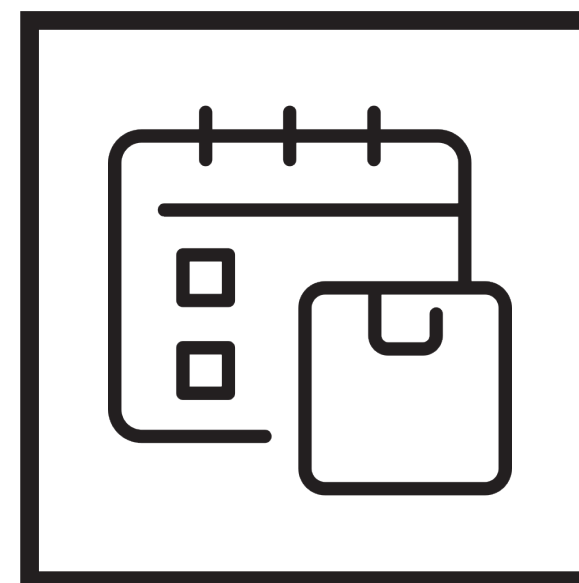
SURVEY METHODOLOGY



SURVEY OF 596 SPORTS FANS



**INCLUDING FOUR MAJOR
GEOGRAPHIC REGIONS**



**THREE-PHASE SURVEY
APPROACH OVER TIME**

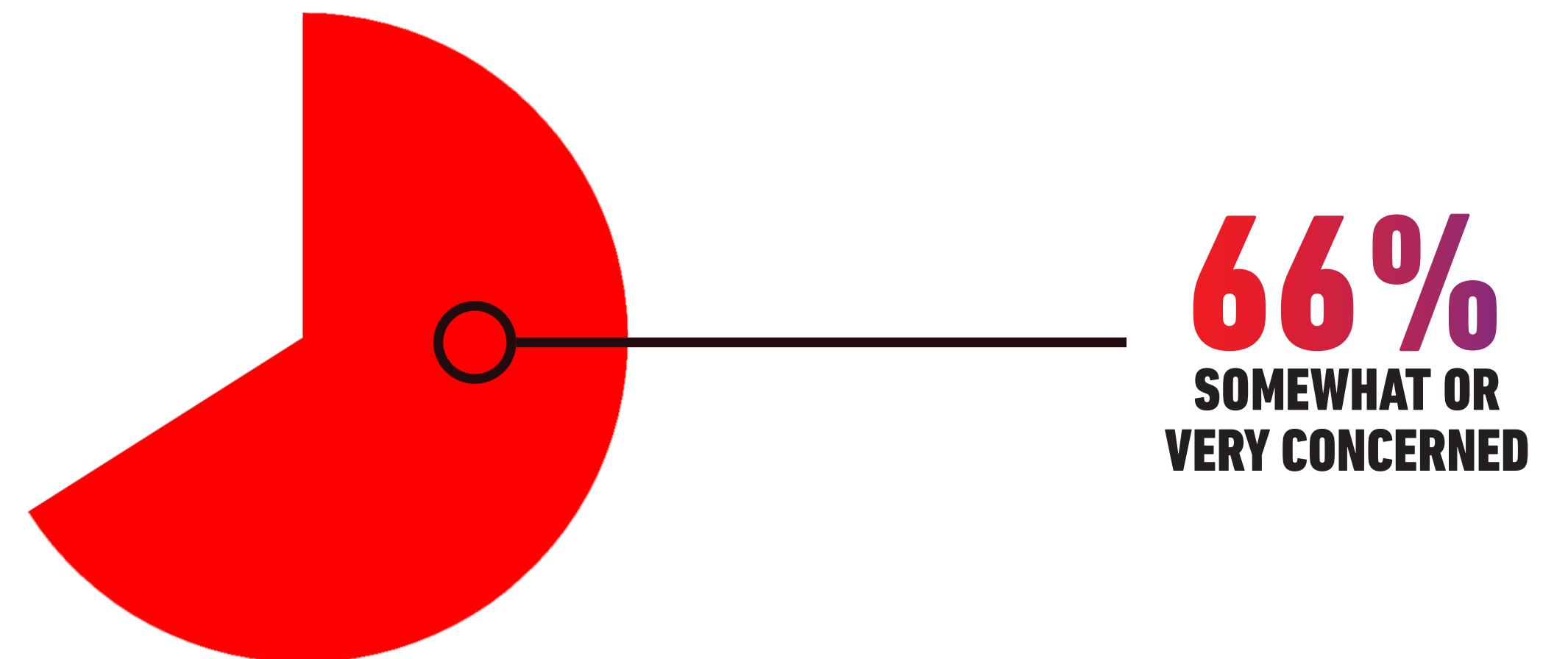


WHAT WE'VE LEARNED

KEY FINDINGS

A MAJORITY OF FANS ARE CONCERNED ABOUT THE PANDEMIC

Two-thirds of respondents – all of whom say they occasionally attend a live sporting event or are interested in sports – say they are somewhat or very concerned about the coronavirus pandemic.



KEY FINDINGS

ATMOSPHERE AND EXPERIENCE ARE CRITICAL TO LIVE EVENTS

Fans report the atmosphere (77%) and the overall experience (71%) of live events as better than those while watching the same event on television. Fully 53% say the available technology is better when watching on television than at live events.

77%

**OF FANS SAY THE
ATMOSPHERE OF LIVE EVENTS
IS BETTER THAN WATCHING
ON TELEVISION**





KEY FINDINGS

SPORTS FAN WANT TO ATTEND EVENTS TO RETURN TO “NORMAL”

Fans miss sporting events and say they would attend events to get back to normal.

Fans who more frequently attended events prior to the pandemic are more willing to attend events sooner and more willing to pay more to attend if an event is only allowed to fill to half capacity.

A background image showing several people from behind, looking at a large curved screen displaying a virtual stadium filled with spectators. The people are in a dark room, and the screen is the main light source. One person in the foreground wears a green sweater, another a patterned vest, and a third a blue Adidas jacket.

KEY FINDINGS

PEOPLE ARE MOST CONCERNED ABOUT OTHER FANS

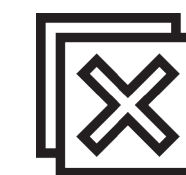
Two-thirds of respondents – all of whom say they occasionally attend a live sporting event or are interested in sports – say they are somewhat or very concerned about the coronavirus pandemic. Their largest concerns include:



LACK OF SOCIAL DISTANCING ENFORCEMENT



LACK OF SOCIAL DISTANCING PROCEDURES



OTHER MEMBERS OF THE PUBLIC



ANALYZING THE INFORMATION

KEY FINDINGS

FANS ARE DIVIDED ON HOW SOON THEY WILL ATTEND SPORTING EVENTS

Approximately **15-20%** will attend in the next few weeks without any limits on the event.

Approximately **10%** say they will never go to a sporting event based on the circumstances in our survey.

Additionally, between one-quarter and one-third of fans say they will not attend an event for at least a year regardless of the measures considered in this survey.



WHEN ARE FANS READY TO ATTEND AN EVENT?



A Minority Are Ready to Attend Now.

15-20% say they would attend a sporting event immediately or in the next few weeks.



A Small Minority Will Never Attend.

7-12% say they will never go to an event regardless of measures considered in our survey.

30% say they will not attend for at least one year even if everyone is required to wear a face-covering/mask.

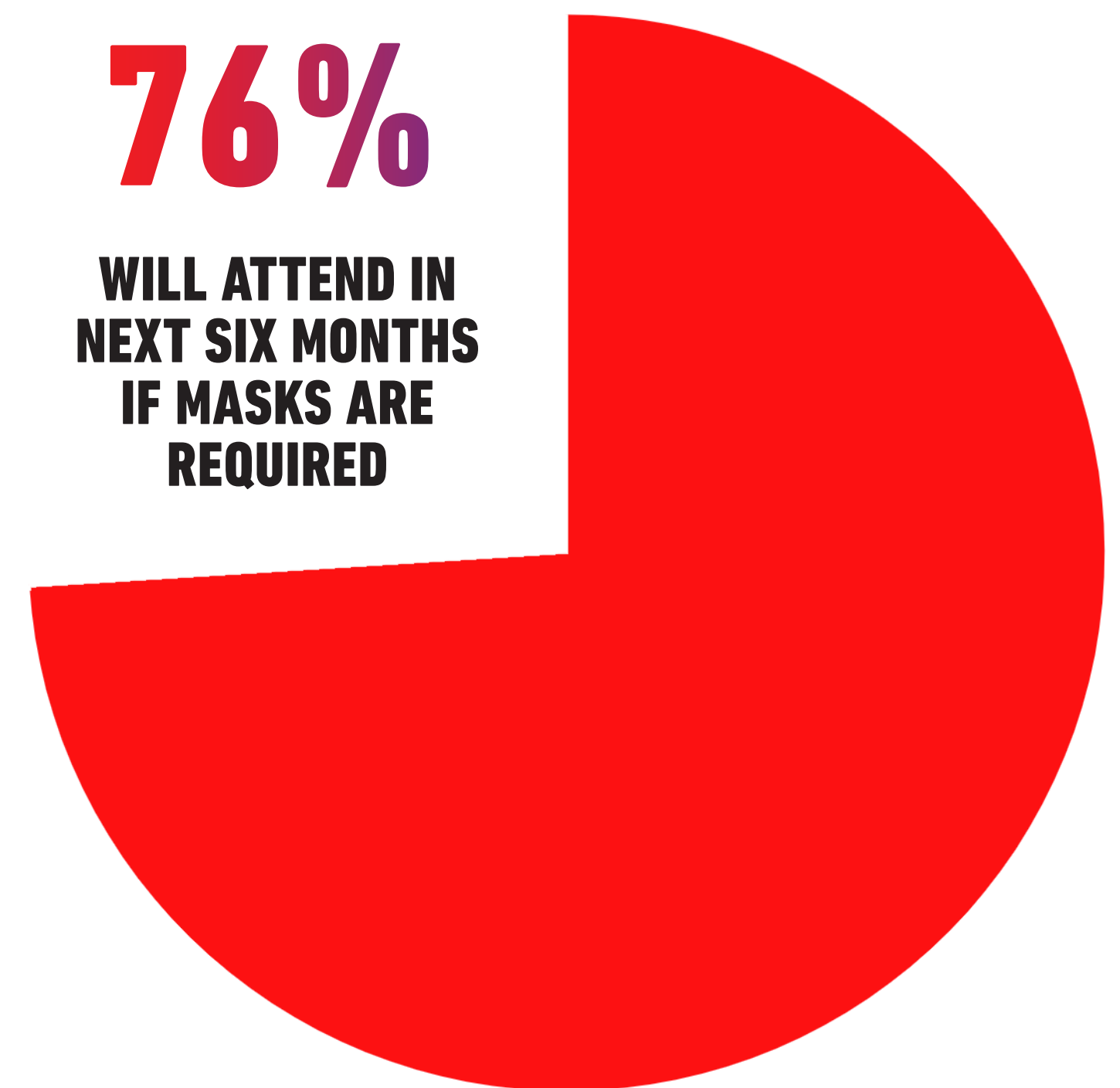


Most Say They Will Attend In the Next 2-5 Months.

15-20% say they would attend a sporting event immediately or in the next few weeks.

43% say they will not attend for at least one year if attendance is not limited in any way.

53% say they will attend in the next 5 months if attendance is limited to half capacity.



WHY DO FANS WANT TO

ATTEND AN EVENT?



Fans miss sports.

Fully 65% say that missing sports or wanting to feel normal again is the strongest reason to attend an event in the next 6 months.

Only 6% say they would attend in the next months because they are not concerned about the health risks associated with the coronavirus pandemic.

44% of respondents who attend at least five pro games and five college games per year say the biggest reason they would attend an event in the next six months is because they want to feel normal again.

44%

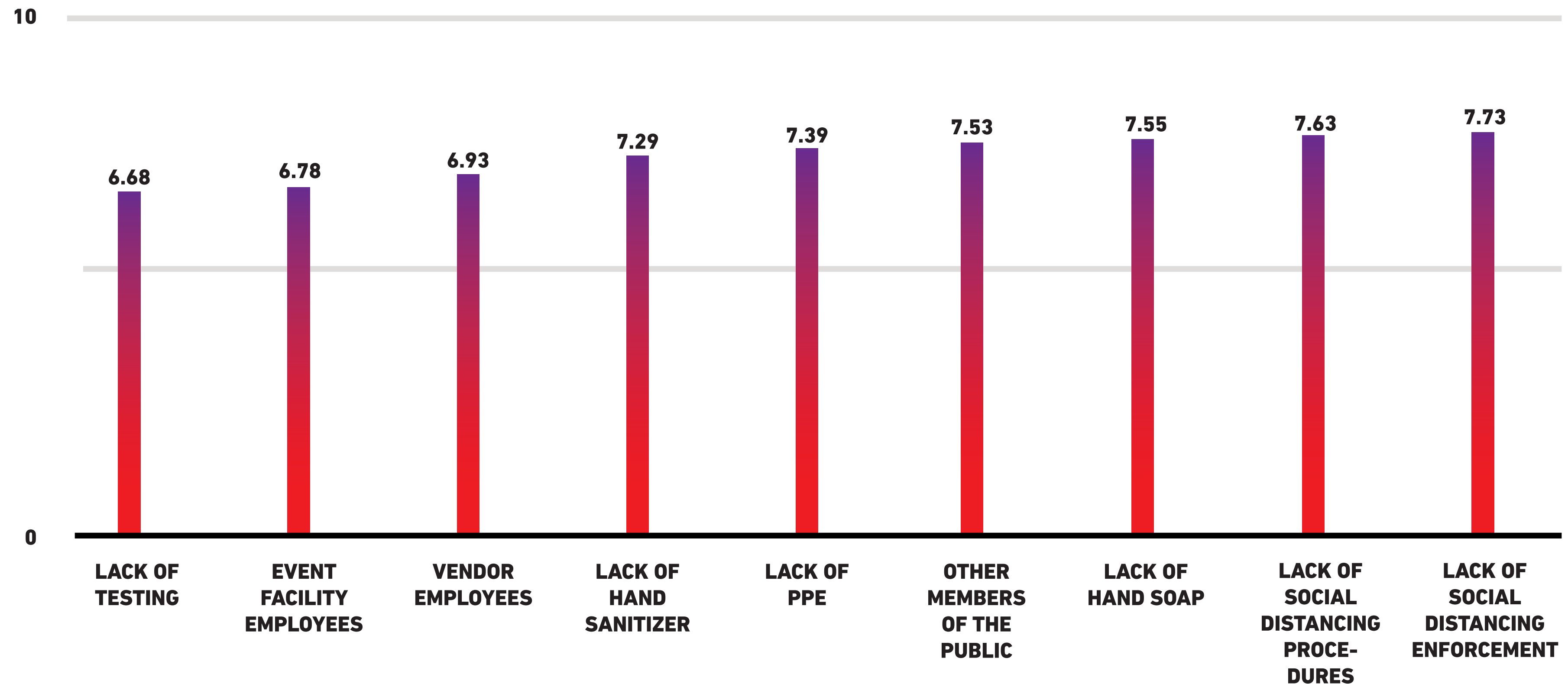
**FREQUENT EVENT
ATTENDEES WOULD
ATTEND AN EVENT
IN THE NEXT SIX
MONTHS TO FEEL
NORMAL**

WHAT ARE FANS MOST

CONCERNED ABOUT?

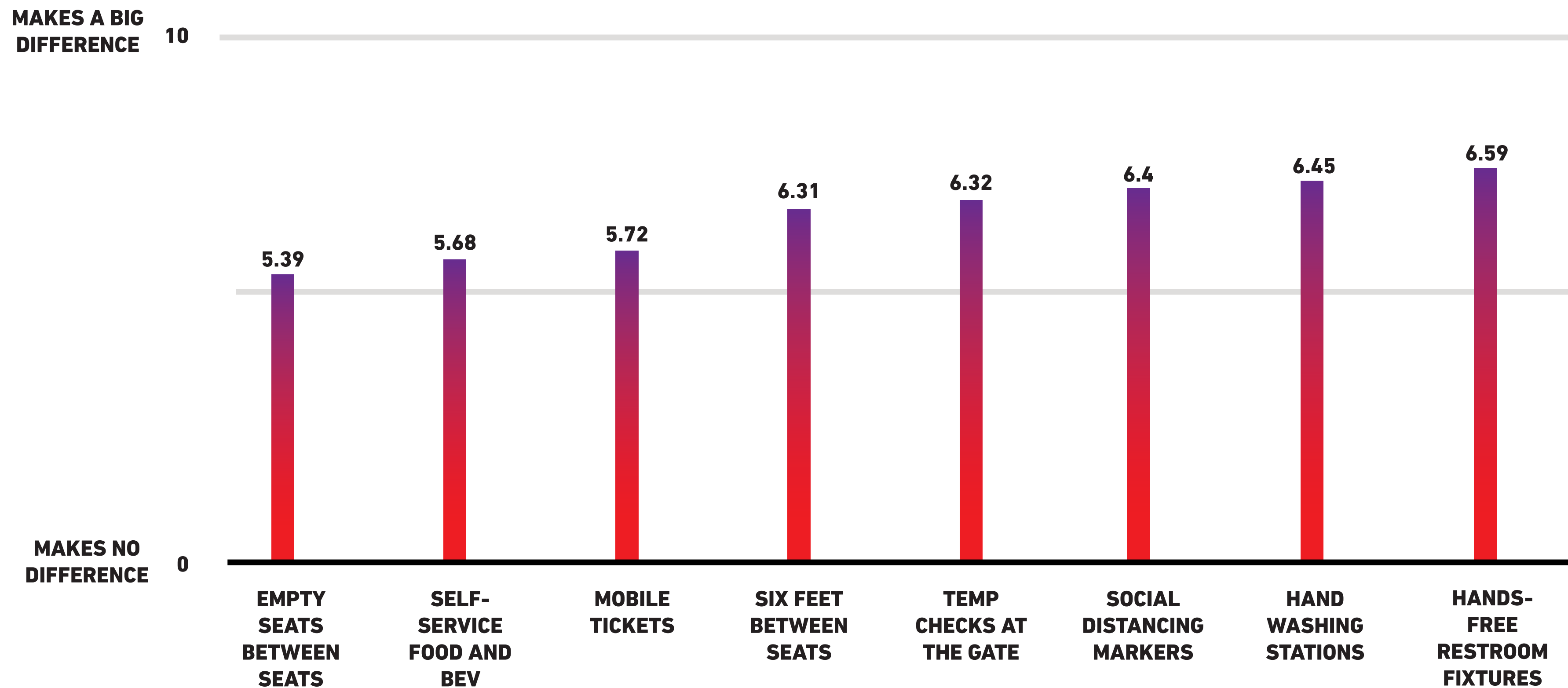


FANS ARE MOST CONCERNED ABOUT OTHER FANS



WHAT WILL MAKE FANS MORE LIKELY

TO ATTEND AN EVENT?

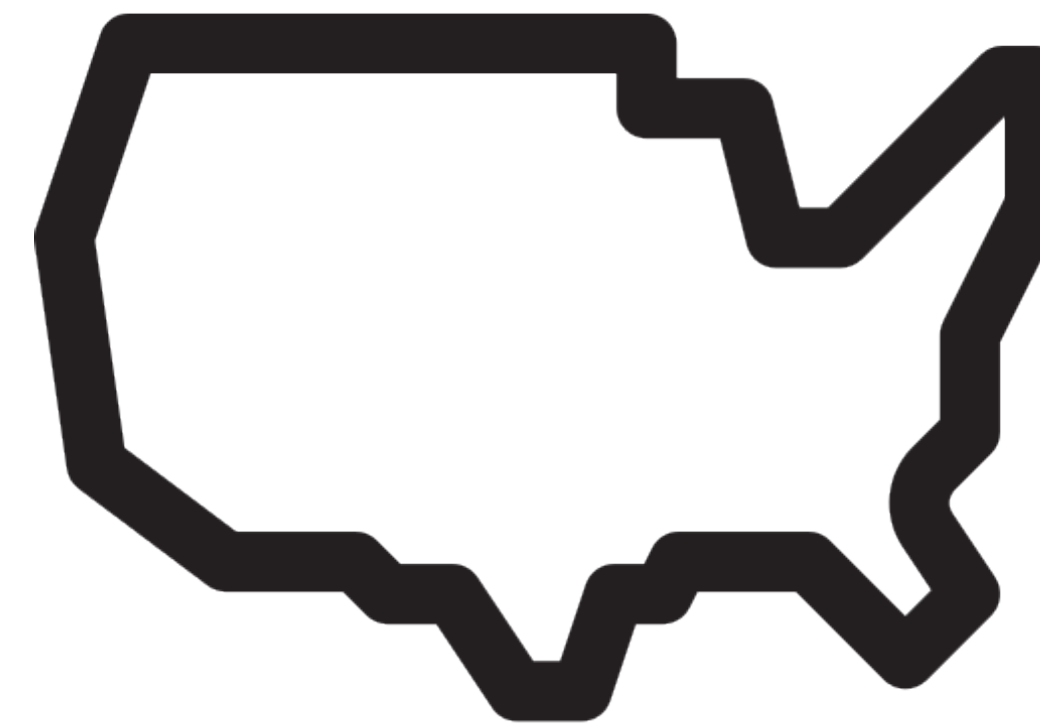


KEY FINDINGS



REGIONAL DIFFERENCES SUGGEST A DIFFERENTIAL RESPONSE TO EVENTS

Fans in more densely populated regions such as the Northeast and South say they are more likely to wait to attend events.



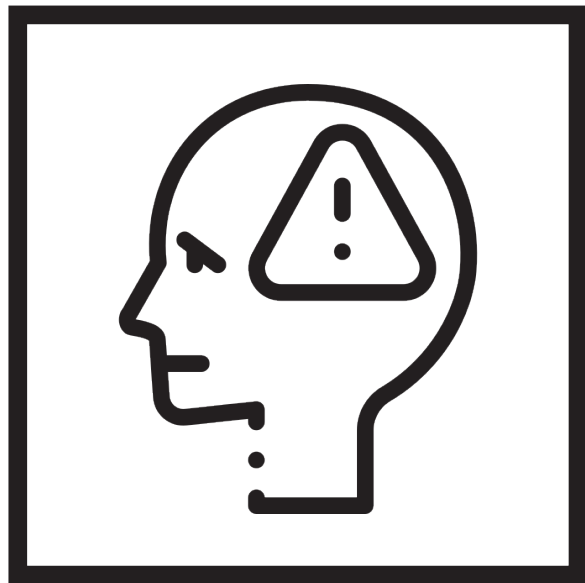
53%

**RESPONDENTS IN
THE NORTHEAST U.S.
WILL NOT ATTEND AN
UNRESTRICTED EVENT
FOR 1 YEAR / WILL
NEVER ATTEND**



THE REALITIES

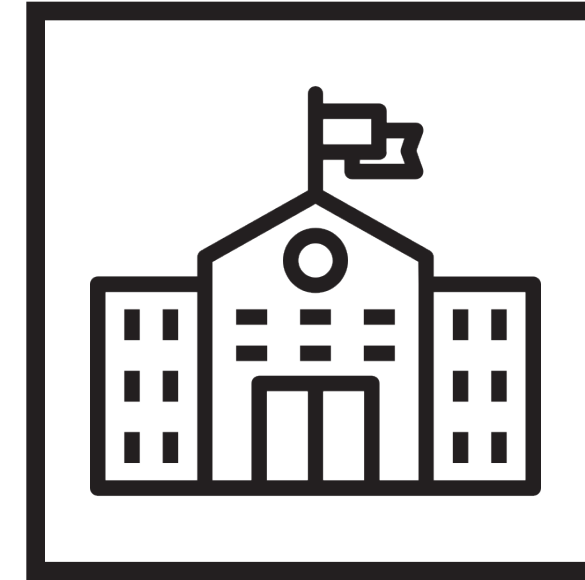
LET'S TALK ABOUT SOME REALITIES.



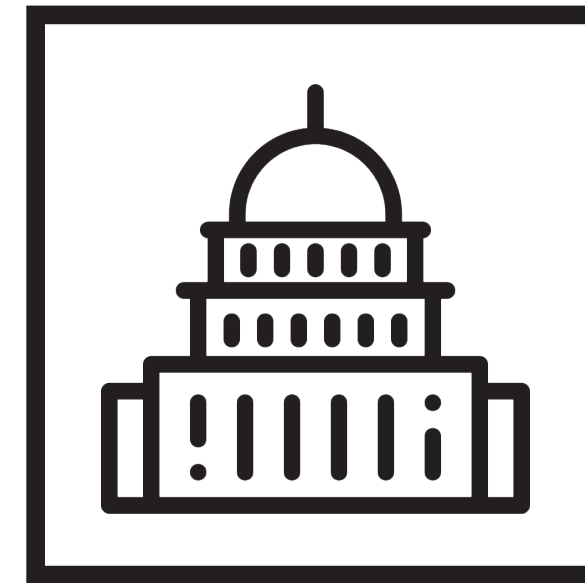
**PEOPLE MAY NOT WANT TO
COME BACK YET**



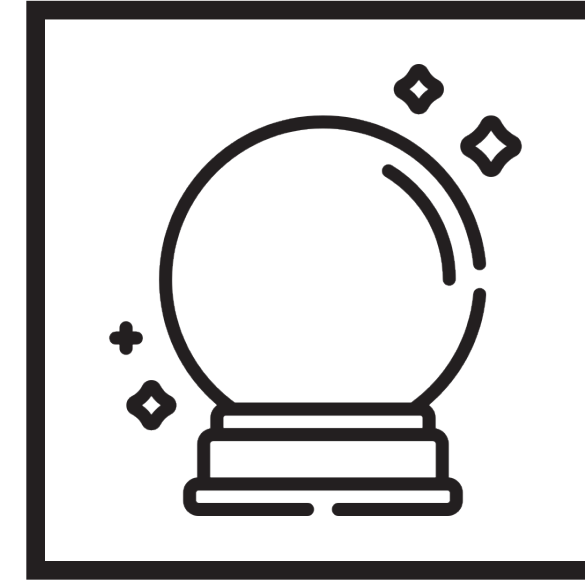
**LOWER BUDGETS
EVERYWHERE**



NCAA GUIDELINES



**LOCAL AND FEDERAL
GUIDELINES**



**TRYING TO PREDICT THE
FUTURE (DON'T PANIC)**



REAL CONCLUSIONS



**THERE IS CONFUSION, BUT WE
DO KNOW HOW WE FEEL.**



**WE NEED START COMMUNICATING
(NOT ABOUT GUIDELINES)**



**REMEMBER THAT YOUR CORE FAN
BASE ISN'T GOING ANYWHERE**



**THERE WILL BE A CONFLICT OF
EMOTIONS, AND FEAR HAS A RANGE**



**PEOPLE ARE AFRAID...AND
ESPECIALLY OF OTHER PEOPLE**



**THINK TEMPORARY AND MAKE THIS
SEASON NOVEL, BUT SPECIAL**



**TREAT FANS LIKE GODS WHEN
THEY COME BACK**



**EVEN IF RESTRICTIONS ARE
LIFTED, CONSIDER KEEPING THEM**



**ANNOUNCE IT AND COMMUNICATE
IT NOW**



**BUILD SAFE FORUMS FOR FANS TO
VOICE THEIR FEAR. TALK TO THEM
CONSISTENTLY. YOU ARE EXPERTS AT
THIS.**



THE SOAPBOX



UNPRECEDENTED MEANS

OPPORTUNITY

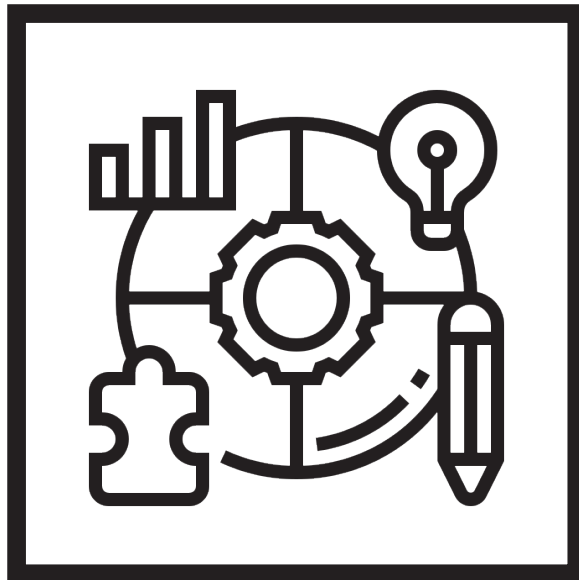
In historical moments, all bets are off, so don't let typical constraints limit creative thinking.



WHAT NEXT?



EXPANDING RESEARCH



TURNING FEEDBACK INTO SOLUTIONS



PREPARING FOR THE NEXT SURVEY



IF YOU WANT HELP, CONTACT ME:

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