

DREAM HOUSE<sup>LA</sup>

# COVID-19 IMPACT SURVEY & RECOMMENDATIONS

## SPORT & CULTURE EVENTS

MAR 23, 2020



WHO WE ARE

**DREAM HOUSE LABS<sup>TM</sup>**  
**IS A BRAND BUILDING STUDIO BASED IN**  
**LOS ANGELES & SYDNEY WITH SPECIALIST**  
**TEAMS DESIGNED AROUND CULTURE,**  
**SPORT, TV & FILM, AND CPG.**

WE ARE HERE TO HELP

This survey was conducted by our in-house research & insights team. This team is available to provide custom reporting & strategic consulting. For more information, contact Jason Fisher at [jason@DreamhouseLABS.com](mailto:jason@DreamhouseLABS.com)

CONTACT US

## ABOUT THIS REPORT

**THIS REPORT AIMS TO PROVIDE GENERAL GUIDANCE OF CONSUMERS' PERSPECTIVES OF SPORT AND CULTURE EVENTS AS A RESULT OF THE CURRENT COVID-19 HEALTH CRISIS.**

- Consumer perception will continue to change throughout this time as more clarity is provided into COVID-19 and changes are made to the world around us.
- This report is free to use for friends and clients of Dream House Labs, we only ask that you distribute the information within this document to maintain context. If you would like to use the information outside of this report, please contact us at [jason@dreamhouselabs.com](mailto:jason@dreamhouselabs.com)

## WHAT THIS IS NOT:

This is not provided to offer any health recommendations of any kind, please follow the recommendations of the WHO, CDC, national and local governments.

This is only designed to help understand how consumers are responding to this crisis as it pertains to events in the sport and culture spaces.

WHAT THIS IS

**WE SURVEYED 650 CONSUMERS AGES 18-64 TO FIND OUT THEIR PERSPECTIVE ON SPORT AND CULTURE EVENTS DURING THIS CURRENT COVID-19 CRISIS.**



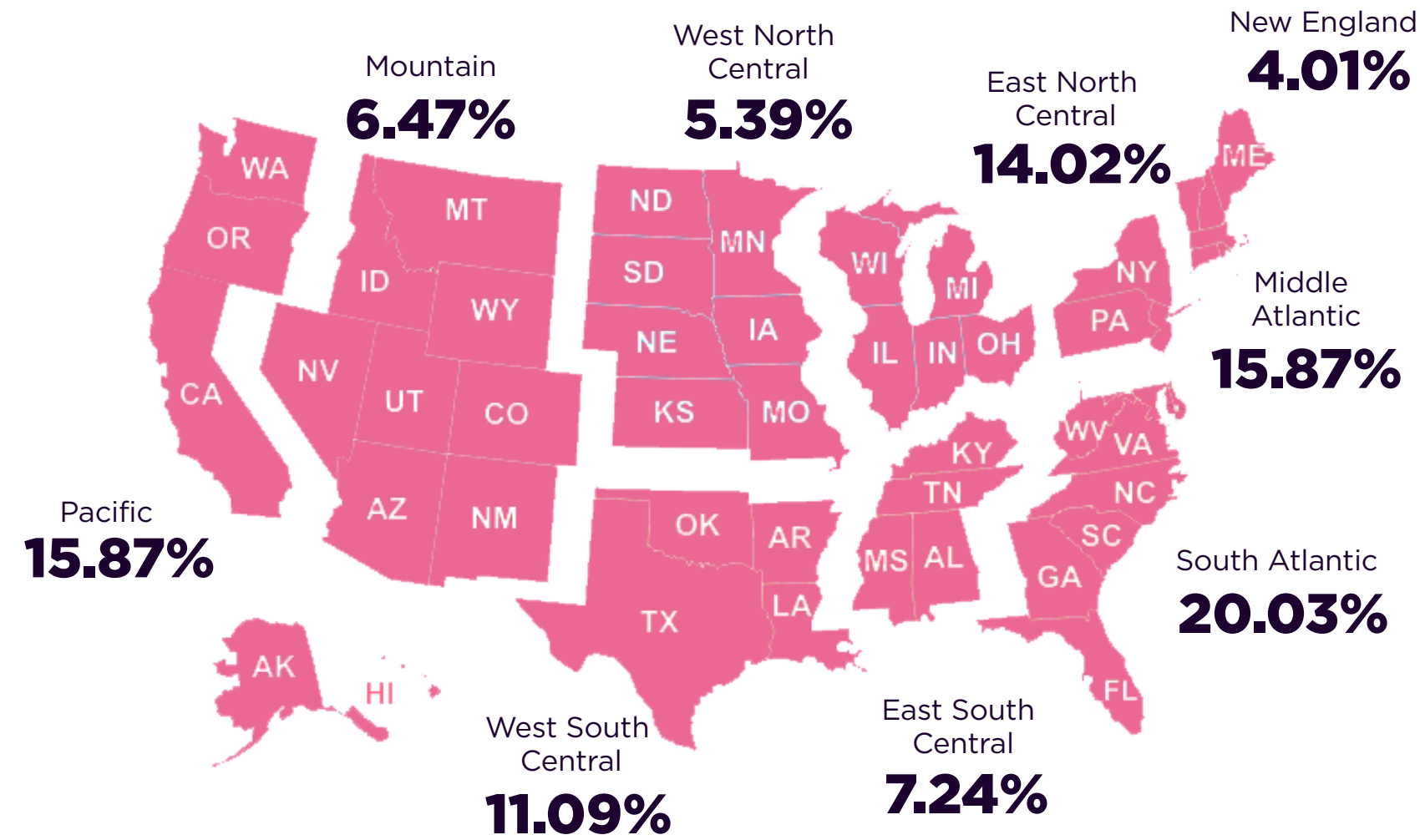
# OVERVIEW OF THE SURVEY PARTICIPANTS

**55.27%**

Female

**44.73%**

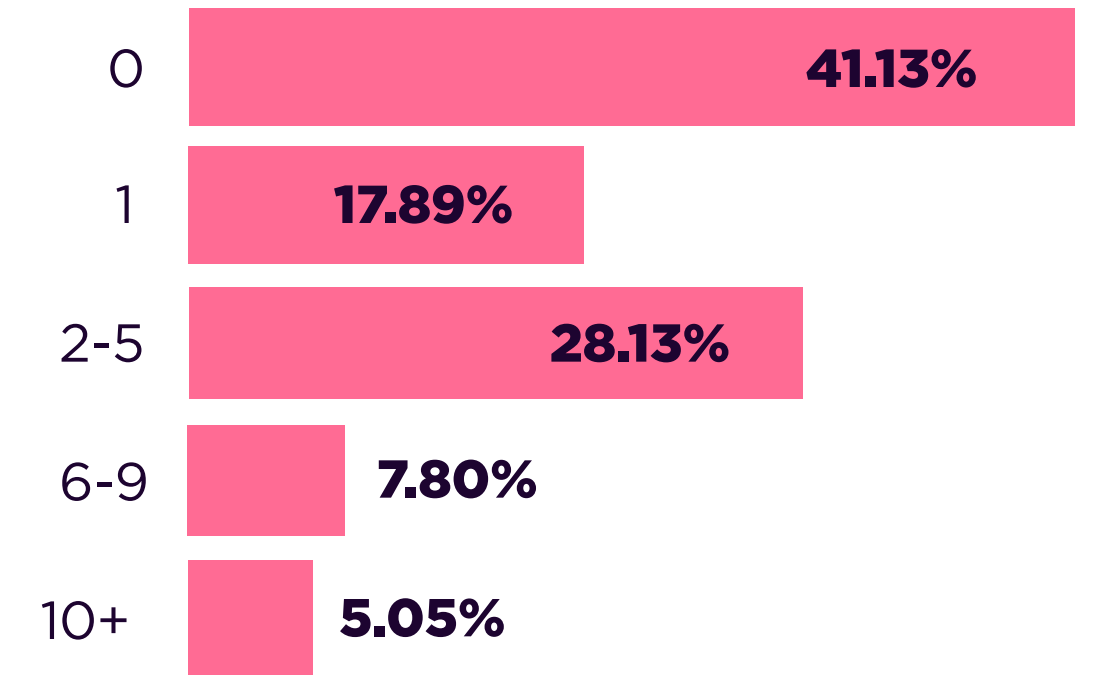
Male



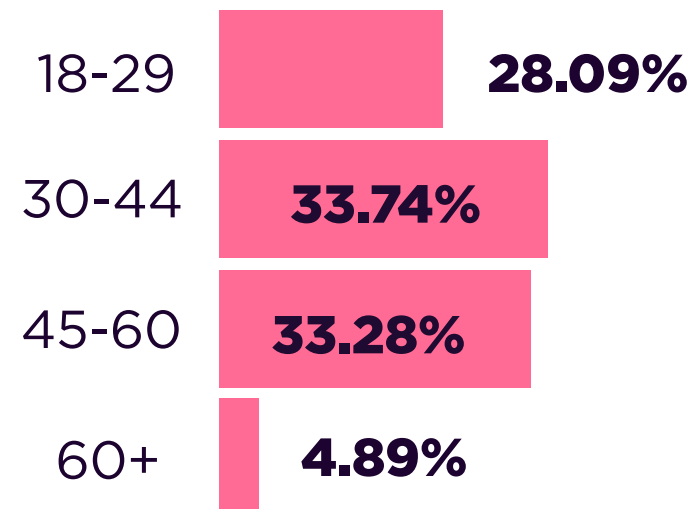
## EVENT ATTENDANCE

**58% have attended 1 or more sports**

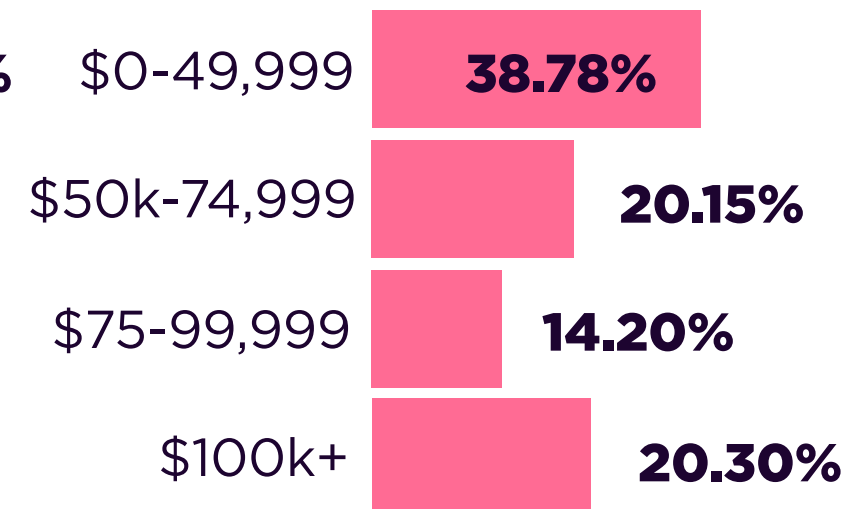
**events in the last year**



## AGE

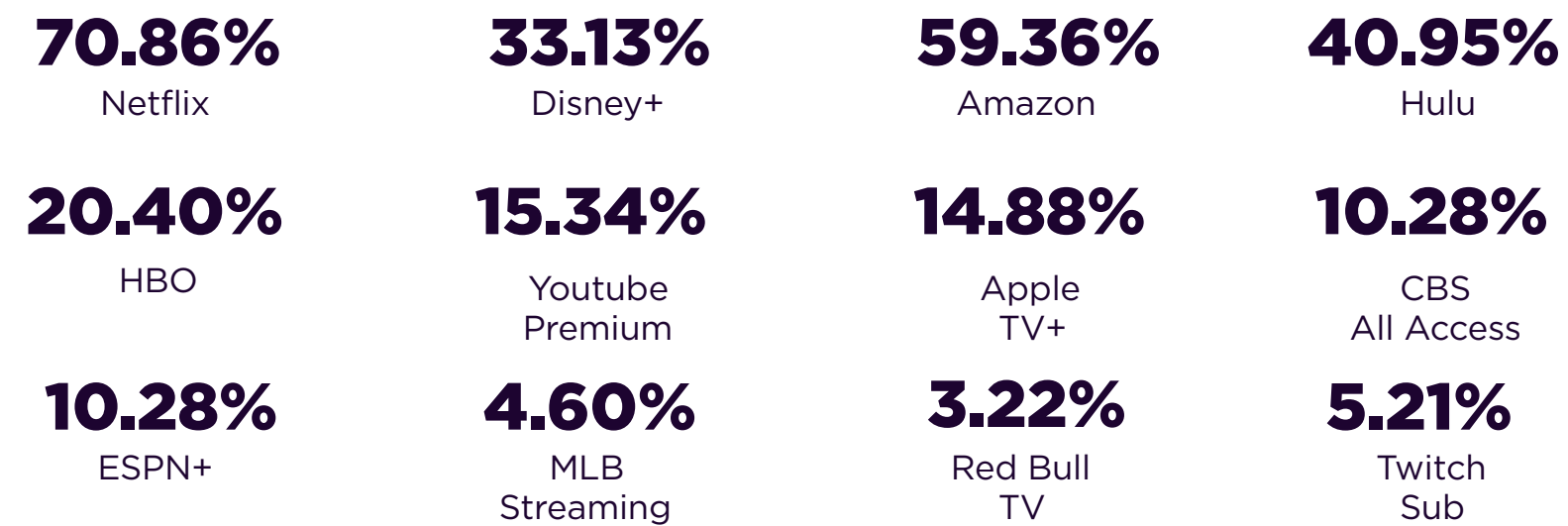


## INCOME



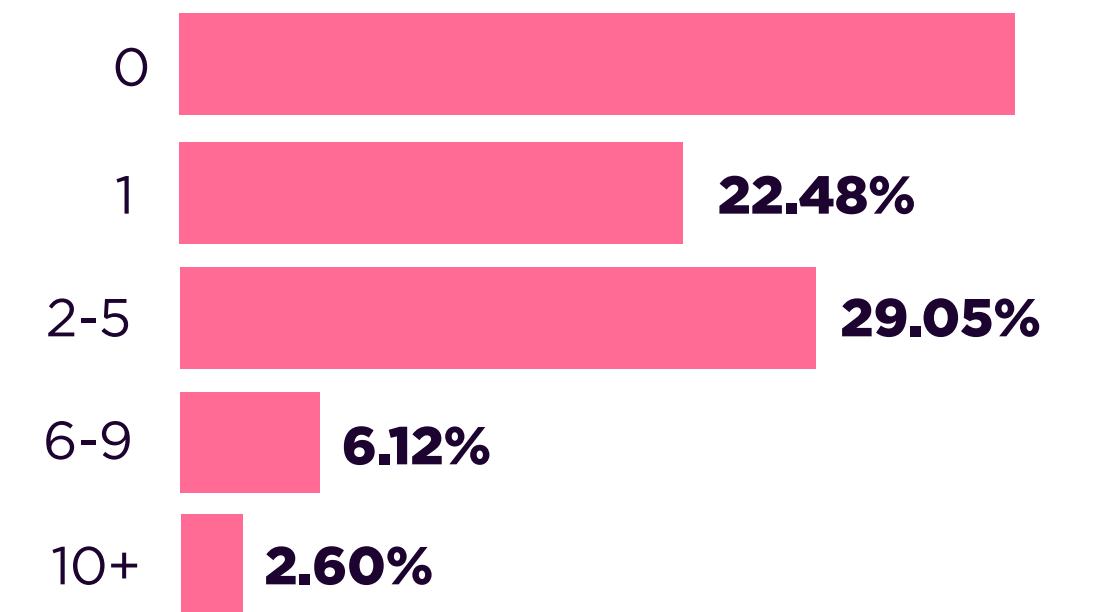
## MEDIA PLATFORMS USED

92.02% subscribe to at least 1 streaming platform



**60% have attended 1 or more music**

**festivals in the last year**





# WE ASKED 23 QUESTIONS RELATED TO SPORTS AND CULTURE EVENTS

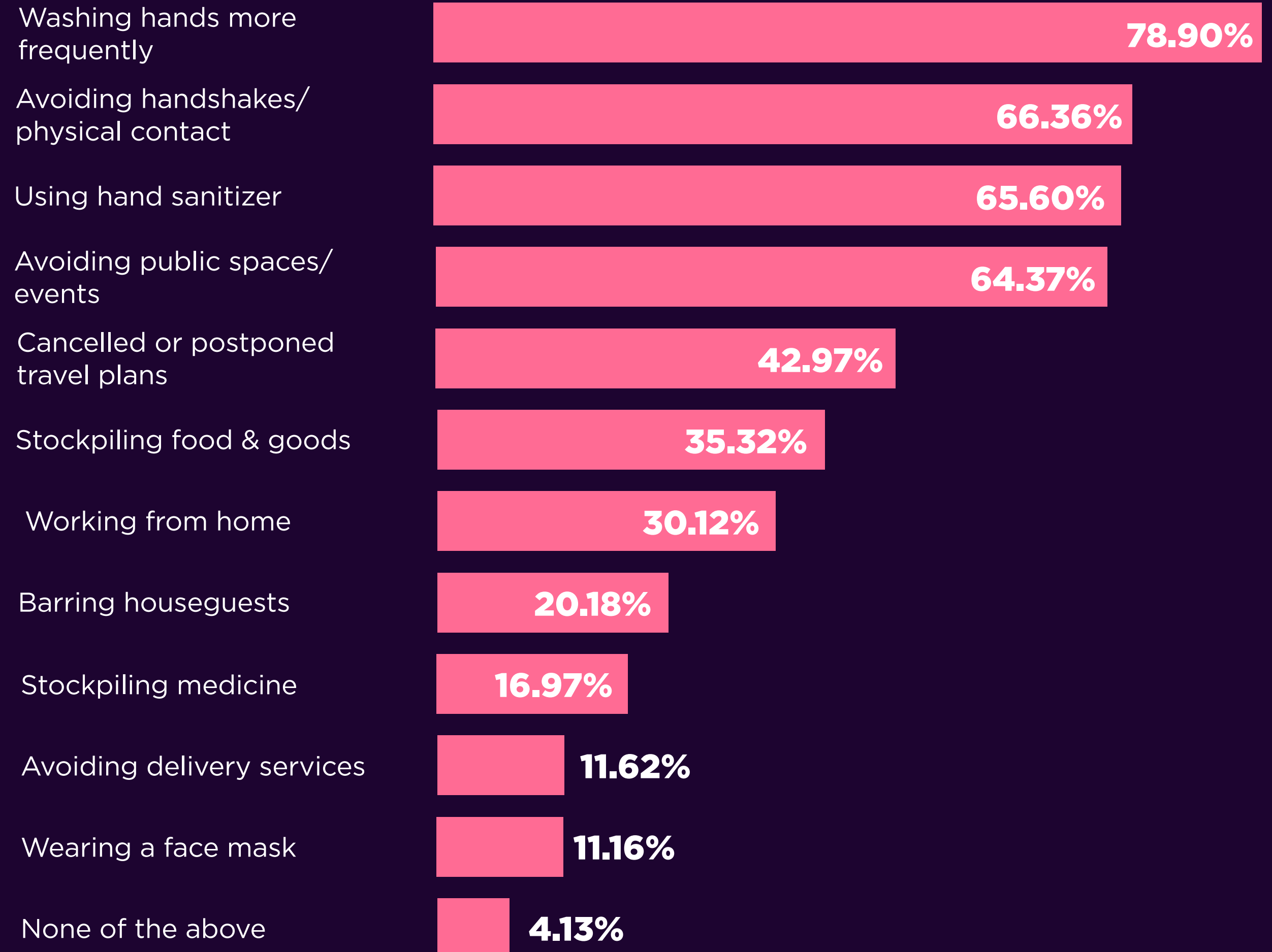
- Q1.** Overall, how concerned are you about the effects of Coronavirus (COVID-19) in the United States?
- Q2.** What specifically are you concerned about related to Coronavirus (COVID-19)?
- Q3.** What precautions have you taken because of concerns surrounding Coronavirus (COVID-19)?
- Q4.** Do you agree with decisions made to cancel or postpone major festivals, concerts and sporting events as a result of the Coronavirus (COVID-19) threat?
- Q5.** When an event is cancelled due to the threat of Coronavirus (COVID-19), ticket-holders should...?
- Q6.** How likely are you to attend a large public event in the next 3 months (this includes sporting events, conventions, music festivals and concerts) as a result of the current Coronavirus outbreak?
- Q7.** How many large sporting events did you attend in the past year?
- Q8.** How many concerts or music festivals did you attend in the past year?
- Q9.** If you're planning to attend an event in the next 3 months, what factors would you most like to see?
- Q10.** If an event offered precautionary health rules, such as mandatory hand sanitization and temperature checks would you be more or less likely to attend?
- Q11.** If an event offered complimentary items like facemasks, hand sanitizer and disinfectant wipes would you be more or less likely to attend?
- Q12.** What additional measures should/can an event take to make you more comfortable with attending?
- Q13.** How much do you agree with the following statements about long-term changes to public events as a result of the current Coronavirus epidemic?
- Q14.** When major events such as professional sporting events and music festivals return, what precautions should be taken regarding potentially sick attendees?
- Q15.** At what point in the process of containing the Coronavirus would we need to be for you to feel safe returning to major events?
- Q16.** How does the current Coronavirus threat affect your decision to attend future events after the precautionary Coronavirus shutdowns have ended?
- Q17.** If a brand continues to hold events during a global health crisis, does that affect your perception of the brand?
- Q18.** During the Coronavirus threat, sporting events should...?
- Q19.** Which content subscription services do you currently subscribe to?
- Q20.** How will the current Coronavirus threat affect your use of content subscription services?
- Q21.** Which additional content subscription services would you subscribe to as a result of the Coronavirus threat?
- Q22.** If sporting event cancellations continue, would you be more or less likely to subscribe to a subscription streaming service to watch your favorite teams and leagues?
- Q23.** Should movies change how they are released during a global health crisis?



## CONSUMER PROFILES

**PARTICIPANTS ARE AWARE OF THE CORONAVIRUS AND ARE TAKING THE CDC/WHO RECOMMENDATIONS OF PRECAUTIONS TO HELP COMBAT THE DISEASE**

## WHAT PRECAUTIONS HAVE YOU TAKEN BECAUSE OF CONCERNS SURROUNDING CORONAVIRUS (COVID-19)? SELECT ALL THAT APPLY





DREAMHOUSE<sup>LA</sup>

# RESULTS AND KEY INSIGHTS

MAR 23, 2020

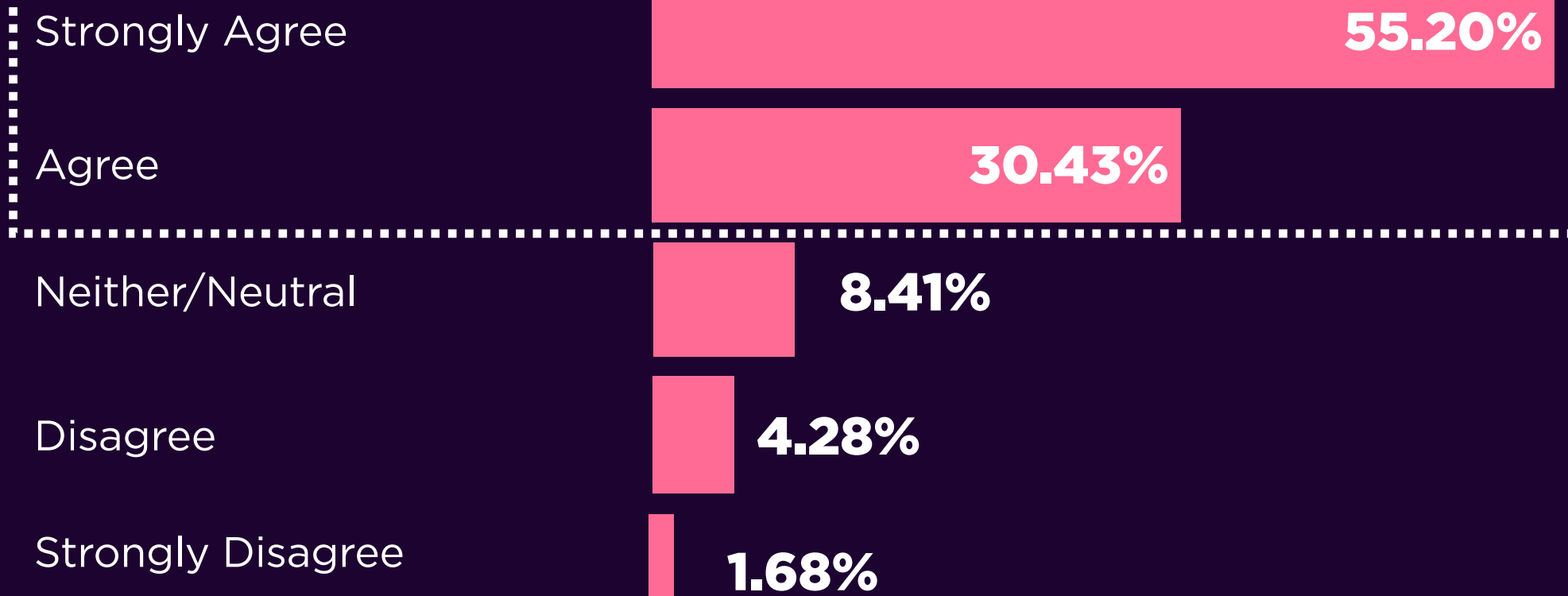


## INSIGHT

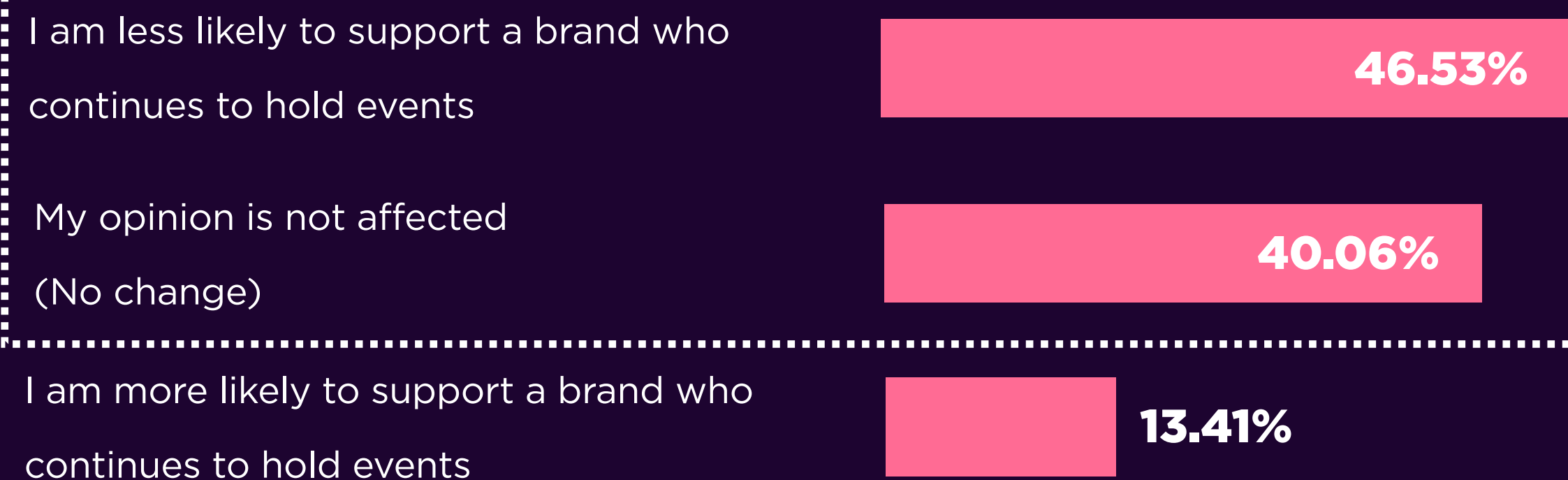
### CONSUMERS AGREE WITH THE CANCELLATION OF EVENTS AND VIEW BRANDS LESS FAVORABLY IF THEY DO NOT CANCEL IN THIS CURRENT HEALTH CLIMATE

Opinion: Conservative, neutral, and liberal media outlets have been reporting on the COVID-19 threat differently during early stages of the COVID-19 threat, which has led to a hypothesis that perception of brands cancelling may be different depending on political stances. This poll was general market and not done on political lines, indicating that this is not the case and that Americans as a whole support the cancellation of events during a global health crisis.

### DO YOU AGREE WITH DECISIONS MADE TO CANCEL OR POSTPONE MAJOR FESTIVALS, CONCERTS AND SPORTING EVENTS AS A RESULT OF THE CORONAVIRUS (COVID-19) THREAT?



### IF A BRAND CONTINUES TO HOLD EVENTS DURING A GLOBAL HEALTH CRISIS, DOES THAT AFFECT YOUR PERCEPTION OF THE BRAND?



## INSIGHT

### CONSUMERS SUPPORT THE CANCELLATION OF SPORTING EVENTS DURING THIS GLOBAL HEALTH CRISIS

Opinion: The current decision to cancel leagues and major sporting events is supported by the general population. However, the 29% who are interested in games being played without an audience raises the question of how core or general audience fans may view this decision differently. This poll does not provide the data necessary to compare core, enthusiast, or general audiences.

### DURING THE CORONAVIRUS THREAT, SPORTING EVENTS SHOULD

Be played as normal, with an audience

13.97%

Be played but without an audience

28.89%

Be cancelled or postponed

57.14%

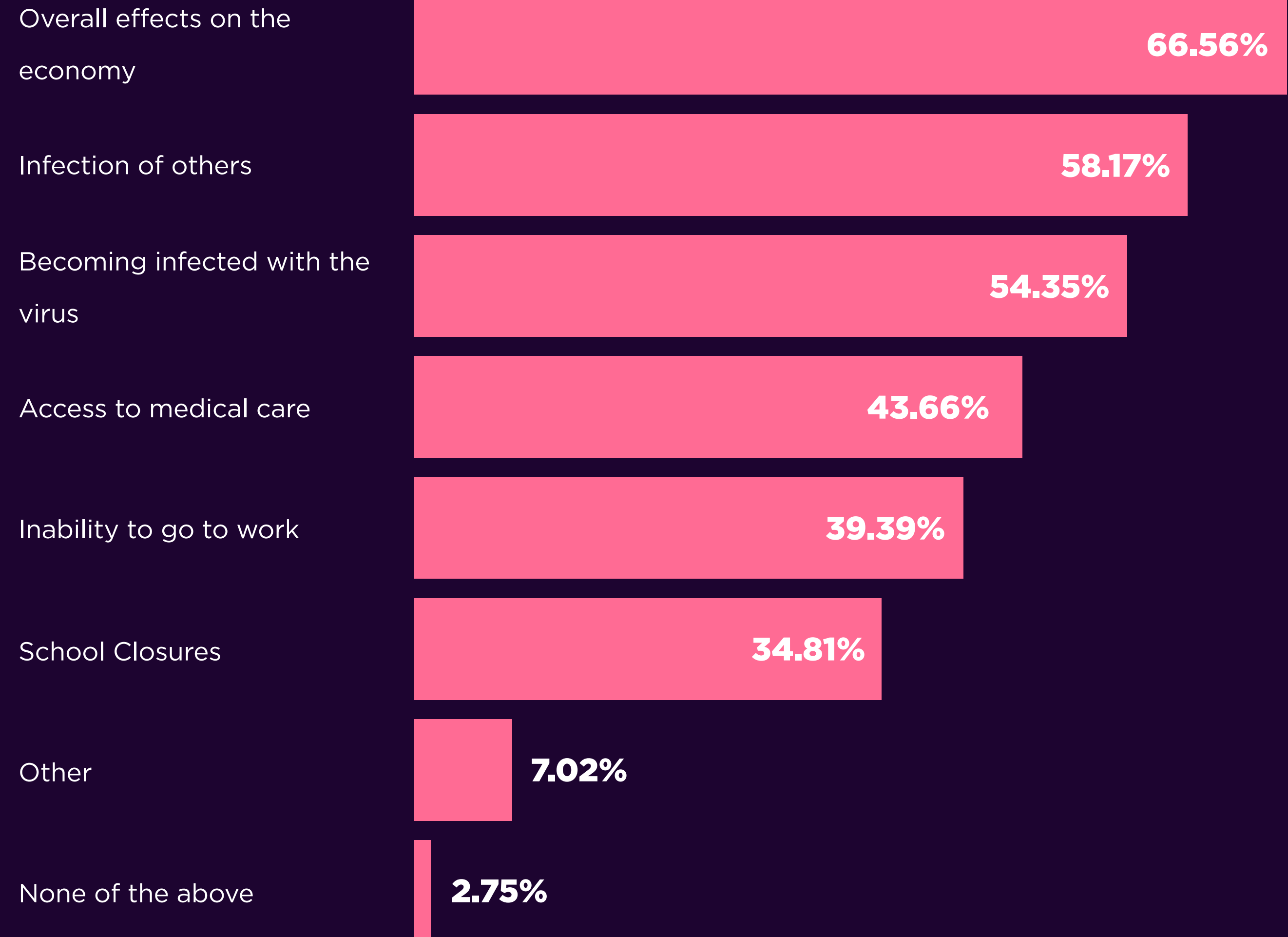


## INSIGHT

### THE ECONOMIC IMPACT IS A MAIN DRIVER OF CONCERN FOR THE MAJORITY OF CONSUMERS

Opinion: Considering the effects on the economy in your response has the potential to effect how consumers see your brand. Brands who create responses to cancellations that financially support their hourly vendors and don't require lay-offs as a result create an opportunity to be viewed favorably in the eyes of their consumers.

### WHAT SPECIFICALLY ARE YOU CONCERNED ABOUT RELATED TO CORONAVIRUS (COVID-19)?

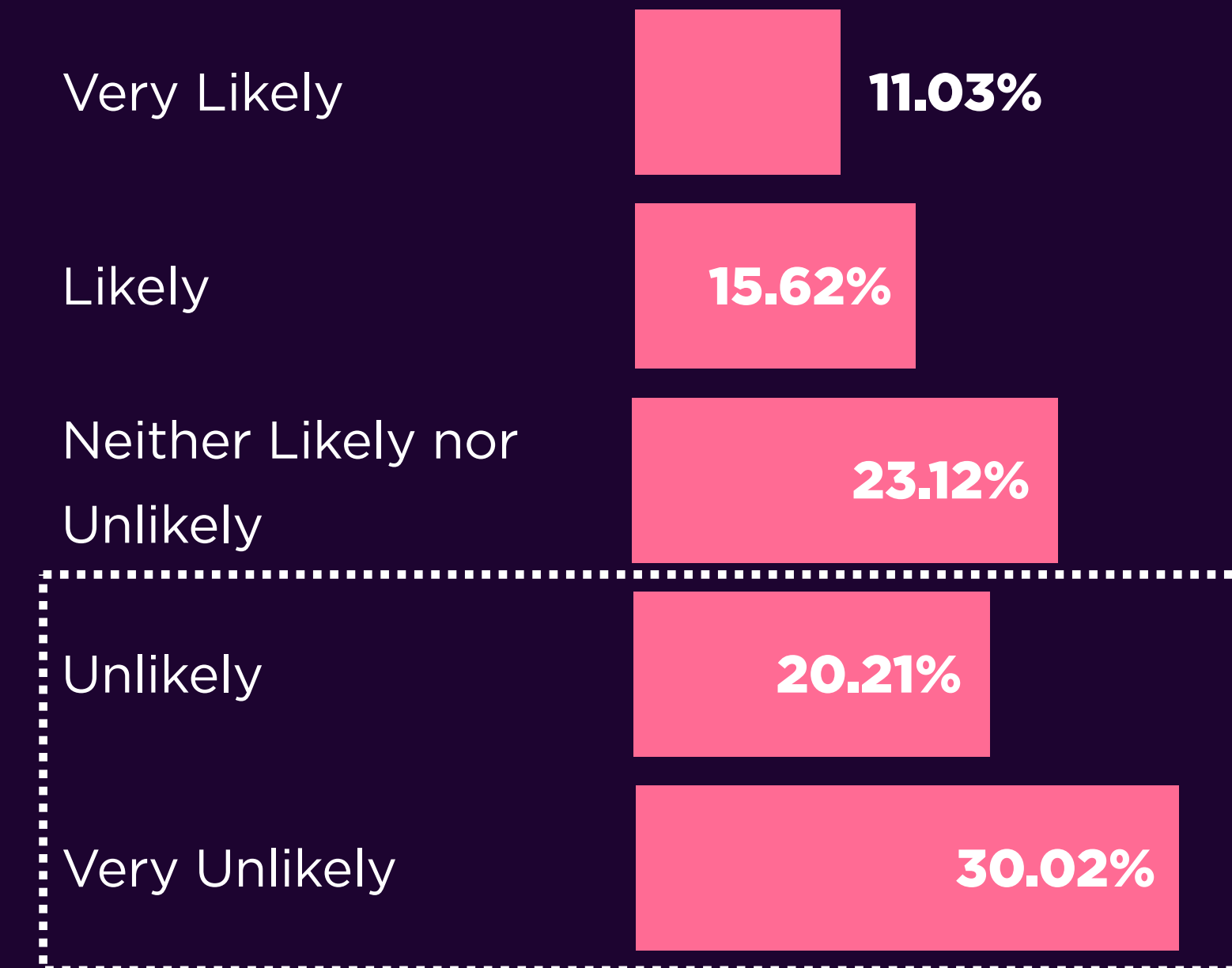


## INSIGHT

### CONSUMERS ARE NOT LIKELY TO ATTEND EVENTS IN THE NEXT 3 MONTHS, BEYOND THE CURRENT “SHELTER AT HOME” RECOMMENDATION WINDOW

Opinion: We will likely see polling to questions such as this change as the conversation in media changes, so it is important not to make long-term decisions as a result of this question and continue to follow results from polling over time. That said, our recommendation is to not plan any ticket on-sales during this time, and if you have an event that can not be successful based solely on last-minute walk-up that is outside the CDC recommended cancellation window but still close to the 3-month window noted in this poll, our recommendation would be to cancel or postpone the event.

### HOW LIKELY ARE YOU TO ATTEND A LARGE PUBLIC EVENT IN THE NEXT 3 MONTHS (THIS INCLUDES SPORTING EVENTS, CONVENTIONS, MUSIC FESTIVALS AND CONCERTS) AS A RESULT OF THE CURRENT CORONAVIRUS OUTBREAK?





## INSIGHT

### IF POSSIBLE, TICKET HOLDERS SHOULD BE OFFERED THE OPTION OF A FULL REFUND

Opinion: Consumers are uncertain about the future both in terms of where we will be with the current global health crisis and their financial stability during this time, as a result the most customer friendly response is to offer a full refund.

One consideration with this question is context. This question was asked in general without any situational considerations. If you can not offer a full refund, we would consider providing clear context as to why and what the impact is on the economy as a result. Would lay-offs of staff happen or vendors go unpaid? Being transparent to your consumers about the impact of the cancellation and why you may be postponing vs. offering a full refund may help if that is your only possible solution.

### WHEN AN EVENT IS CANCELLED DUE TO THE THREAT OF CORONAVIRUS (COVID-19), TICKET-HOLDERS SHOULD

Be given full refunds with no guarantee of a future event

77.85%

Be guaranteed a ticket to a future event

22.15%

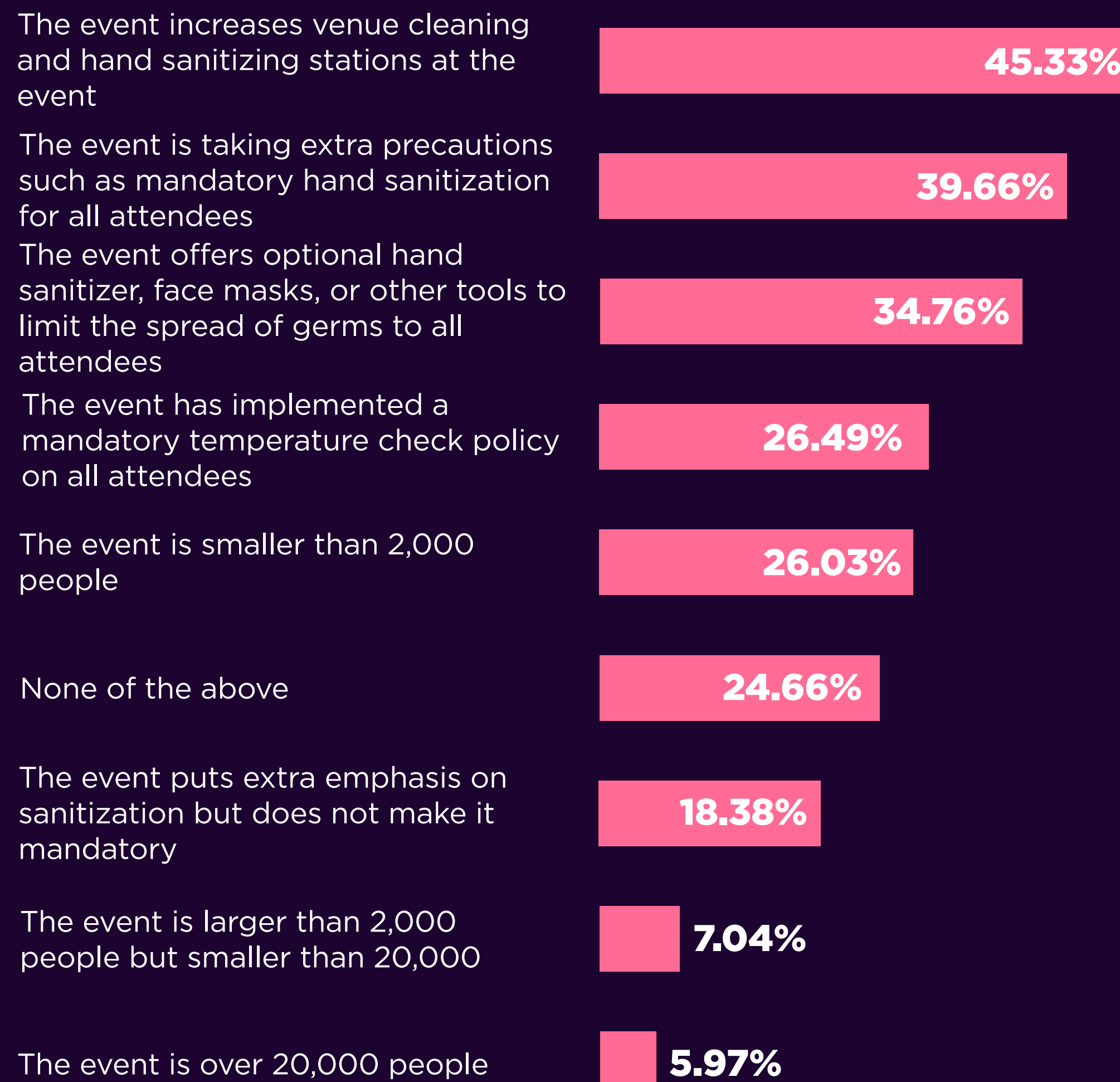
## INSIGHT

### WHEN EVENTS RETURN, HAVE A CLEAR PLAN TO COMMUNICATE YOUR CLEANING EFFORTS AND VISIBLY SHOW THEM DURING THE EVENT

Opinion: Consumers want to see increased efforts for both personal and group sanitization including increases in hand sanitizing efforts, venue cleaning, and even at times mandatory implementation of self-cleaning rules for guests of an event.

It is important to note that it isn't enough to make these efforts, it is important to have a strategy to communicate them in advance and visibly show the efforts on site. Consumers will want to see extra janitorial staff working during the event and increased availability of personal sanitization efforts.

### IF YOU'RE PLANNING TO ATTEND AN EVENT IN THE NEXT 3 MONTHS, WHAT FACTORS WOULD YOU MOST LIKE TO SEE? (SELECT 3)





## INSIGHT

### OFFERING PRECAUTIONARY HEALTH RULES AND COMPLIMENTARY SANITIZATION ITEMS WILL INCREASE THE LIKELIHOOD TO ATTEND FOR MANY

Opinion: When your events return, planning precautionary health rules and offering complimentary items such as face masks, hand sanitizer, and disinfectant wipes will make many consumers feel safer to attend events. Plan for these strategies to be implemented for at least 12 months, if not longer.

### IF AN EVENT OFFERED PRECAUTIONARY HEALTH RULES, SUCH AS MANDATORY HAND SANITIZATION AND TEMPERATURE CHECKS WOULD YOU BE MORE OR LESS LIKELY TO ATTEND?

More Likely to Attend

38.73%

Less Likely to Attend

16.51%

Neither More nor Less Likely to Attend

44.75%

### IF AN EVENT OFFERED COMPLIMENTARY ITEMS LIKE FACE MASKS, HAND SANITIZER AND DISINFECTANT WIPES WOULD YOU BE MORE OR LESS LIKELY TO ATTEND?

More Likely to Attend

44.68%

Less Likely to Attend

11.71%

Neither More nor Less Likely to Attend

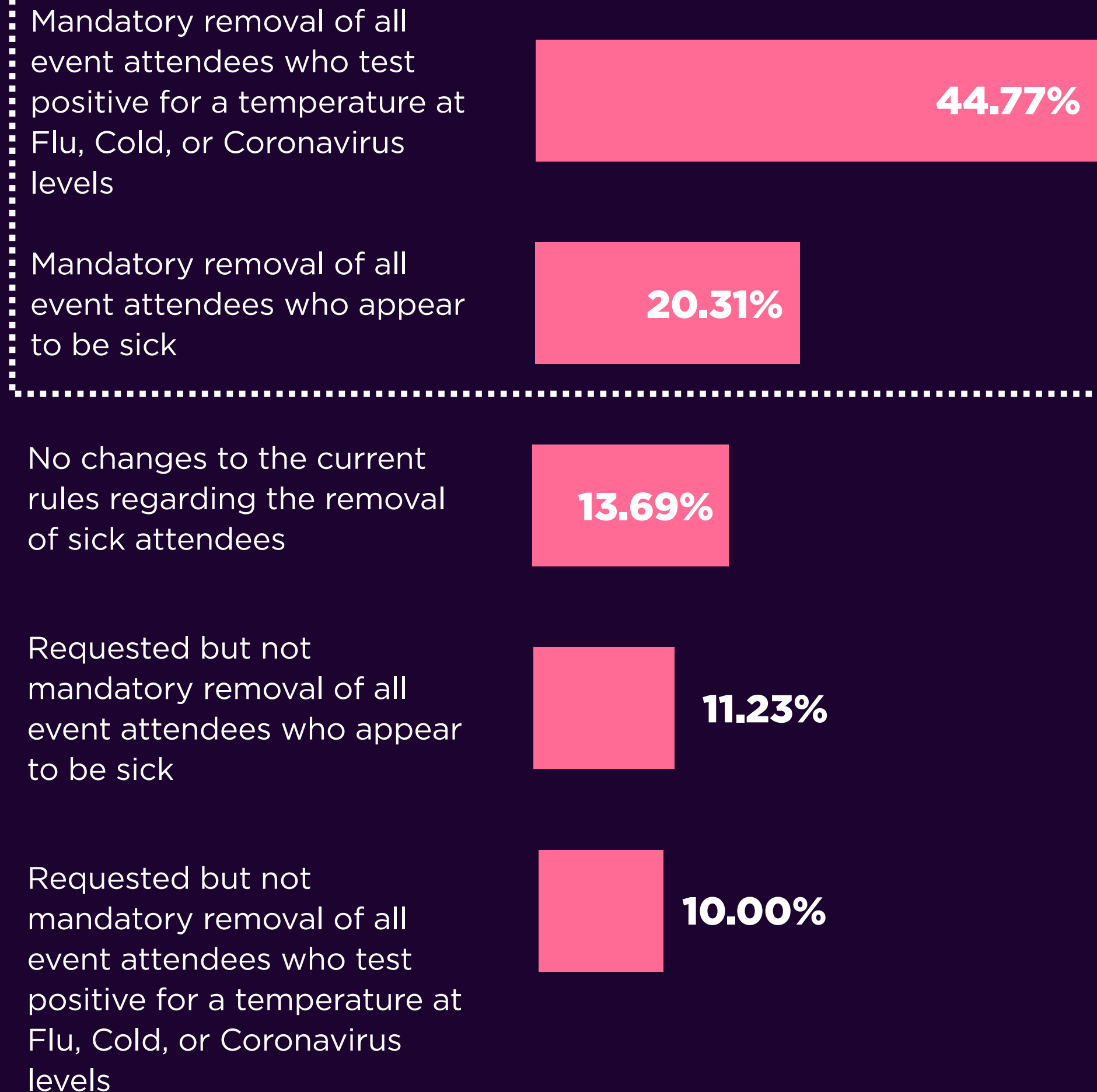
43.61%

## INSIGHT

### 65% OF CONSUMERS SUPPORT THE MANDATORY REMOVAL OF SICK ATTENDEES FROM EVENTS

Opinion: Consumers are open to accepting invasive measures in exchange for their safety, this is similar to TSA regulations that came after 9/11. This however is a question that will likely change over time, as the perception of safety shifts.

### WHEN MAJOR EVENTS SUCH AS PROFESSIONAL SPORTING EVENTS AND MUSIC FESTIVALS RETURN, WHAT PRECAUTIONS SHOULD BE TAKEN REGARDING POTENTIALLY SICK ATTENDEES?





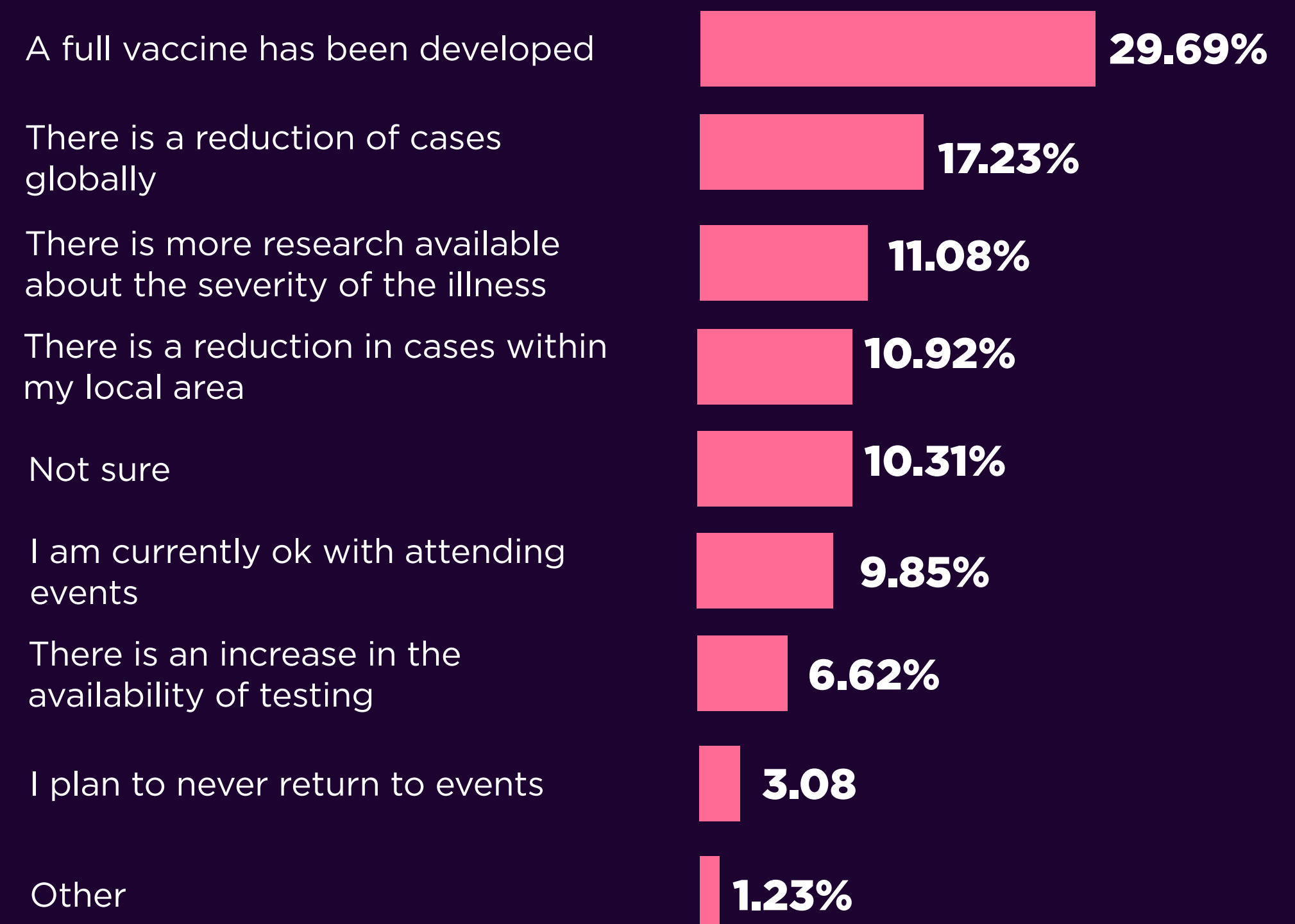
## INSIGHT

### EVEN ONCE EVENTS RETURN, THE ANXIETY AROUND ATTENDANCE WILL LIKELY REMAIN

Opinion: Estimates are 12-18 months to find a full vaccine for Coronavirus. As a result, many will maintain anxiety about events until this happens and in all likelihood, even after the threat of COVID-19 has ended.

NOTE: Answers to questions like this will likely shift over time as more facts become clear and the media conversation shifts focus away from COVID-19. Our recommendation is to implement long-term policies that see a visual increase in venue and attendee sanitization.

### AT WHAT POINT IN THE PROCESS OF CONTAINING THE CORONAVIRUS WOULD WE NEED TO BE FOR YOU TO FEEL SAFE RETURNING TO MAJOR EVENTS? (SELECT ONE)





## INSIGHT

### IF PRECAUTIONARY MEASURES ARE ADDED TO YOUR EVENTS, YOU WILL NOT LIKELY SEE LONG-TERM IMPACT ON ATTENDEES, ONCE EVENTS RETURN

Opinion: Overall, we should not be alarmed about long-term experiential strategies, but should make adjustments to make cleaner and safer environments for our attendees.

### HOW DOES THE CURRENT CORONAVIRUS THREAT AFFECT YOUR DECISION TO ATTEND FUTURE EVENTS AFTER THE PRECAUTIONARY CORONAVIRUS SHUTDOWNS HAVE ENDED?

I will continue to attend events at the same rate as before the Coronavirus, but will be more cautious of my surroundings

24.00%

I will continue to attend events at the same rate as before Coronavirus (No change)

18.92%

I plan to only attend events that take extra precautionary measures

15.23%

I will increase attendance of events when they are safe to return to

10.46%

I will decrease attendance of events when they are safe to return to

19.85%

I never attend events

11.54%



An aerial, high-angle photograph of a large, dense crowd of people gathered in an outdoor public space, likely a festival or event. The people are seen from above, creating a mosaic of colors and shapes. The ground is paved with cobblestones or similar material. The overall scene is busy and vibrant.

**“KNOWING THAT THEY RAMP UP THE CLEANLINESS  
OF THE VENUE AND RESTROOMS IN PARTICULAR  
AND ALSO THE AIR QUALITY”**

- SURVEY RESPONDENT

**DREAMHOUSE**<sup>LA</sup>



## INSIGHT

### CONSUMERS WANT TO SEE YOU INTEGRATE LONG-TERM STRATEGIES, EVEN AFTER THE COVID-19 THREAT IS GONE

Opinion: The response to this question indicates consumers see this global health crisis on the scale of other recent events such as 9/11 and the 2008 housing crisis. After these moments, consumers looked to support politicians, businesses, and thought-leaders who had clear strategies to prevent these kinds of things for the future.

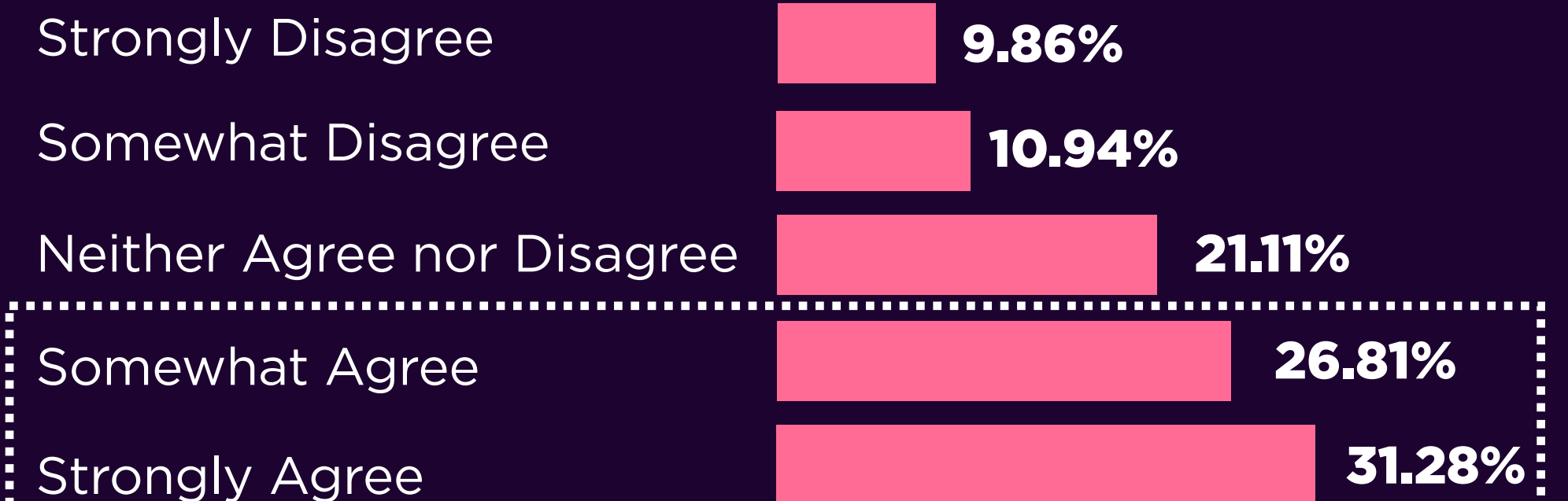
For any company operating in the experiential space, this will likely be no different. In the coming months, prepare your strategy for how you will adjust your business as a result of this long-term, considering new cleaning measures and potential rules that mandate or offer options for additional sanitization of event attendees.

### HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS ABOUT LONG-TERM CHANGES TO PUBLIC EVENTS AS A RESULT OF THE CURRENT CORONAVIRUS EPIDEMIC?

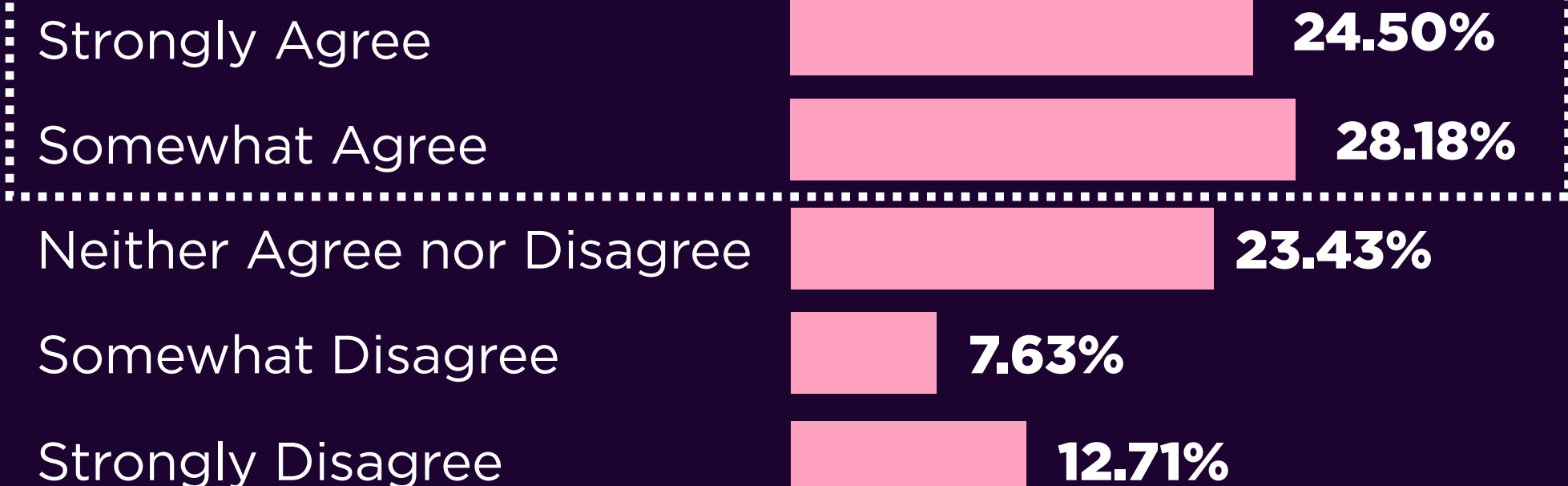
There should be **NO LONG-TERM CHANGES** once the Coronavirus has been resolved



There should be **MANDATORY** Hand sanitization and temperature checks of all attendees prior to entry



There should be expanded availability of **OPTIONAL** hand-sanitization and temperature checks for attendees





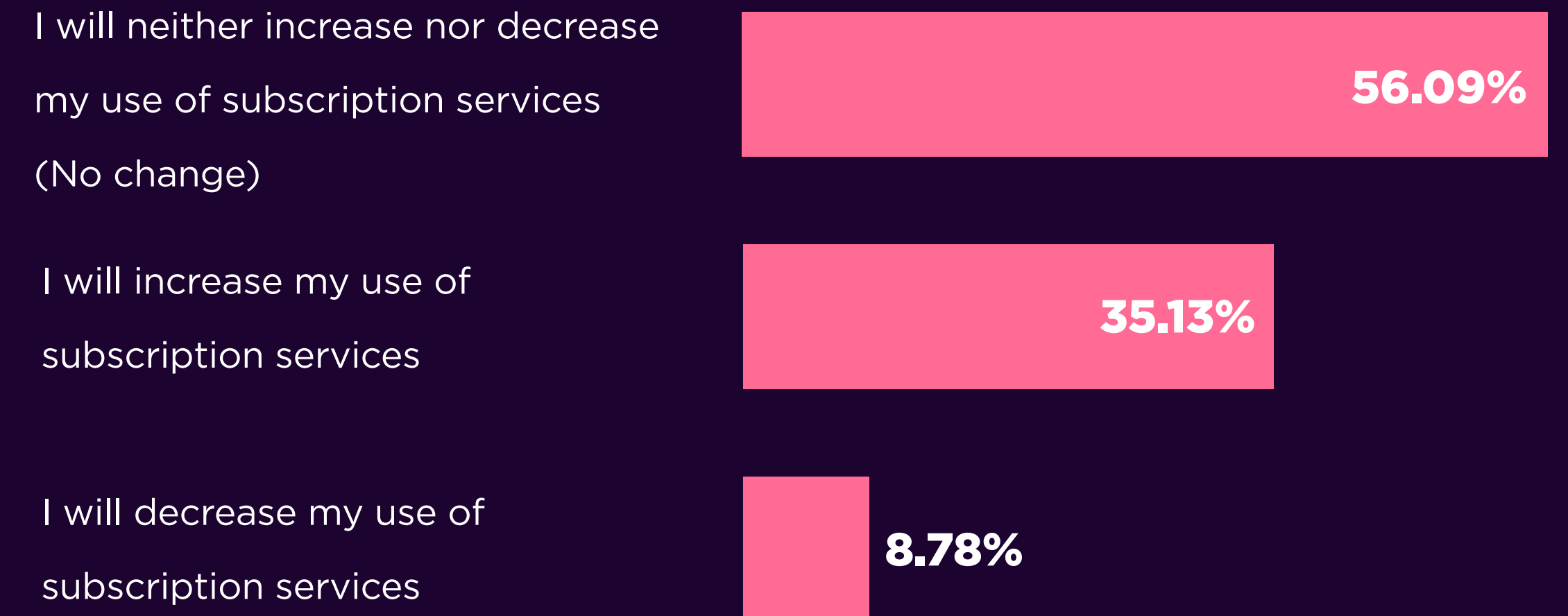
## INSIGHT

### CONSUMERS ALREADY WATCH A LOT OF TV AND MANY PLAN ON INCREASING CONSUMPTION AS A RESULT OF SOCIAL DISTANCING

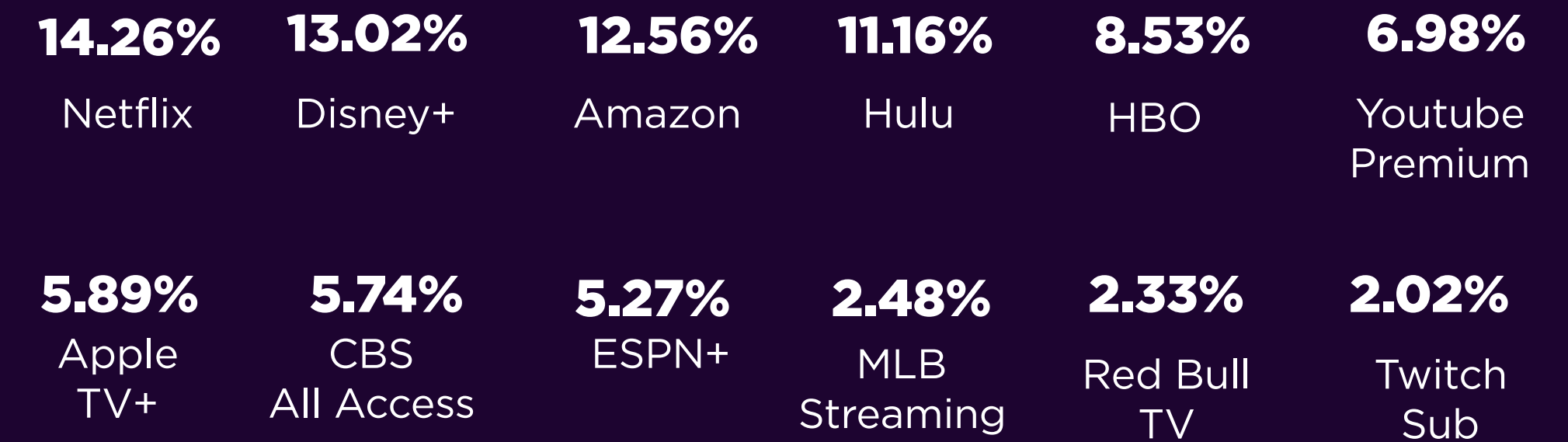
Opinion: If you have content to release, now is a great time to experiment with OTT channels as release options. Consumers surveyed already consume a lot of content and many plan on increasing this consumption with a likelihood of trying an entirely new OTT offering.

\*Context: 92% surveyed already had one or more subscriptions

### HOW WILL THE CURRENT CORONAVIRUS THREAT AFFECT YOUR USE OF CONTENT SUBSCRIPTION SERVICES?



### WHICH STREAMING SERVICES ARE YOU LIKELY TO SUBSCRIBE TO?

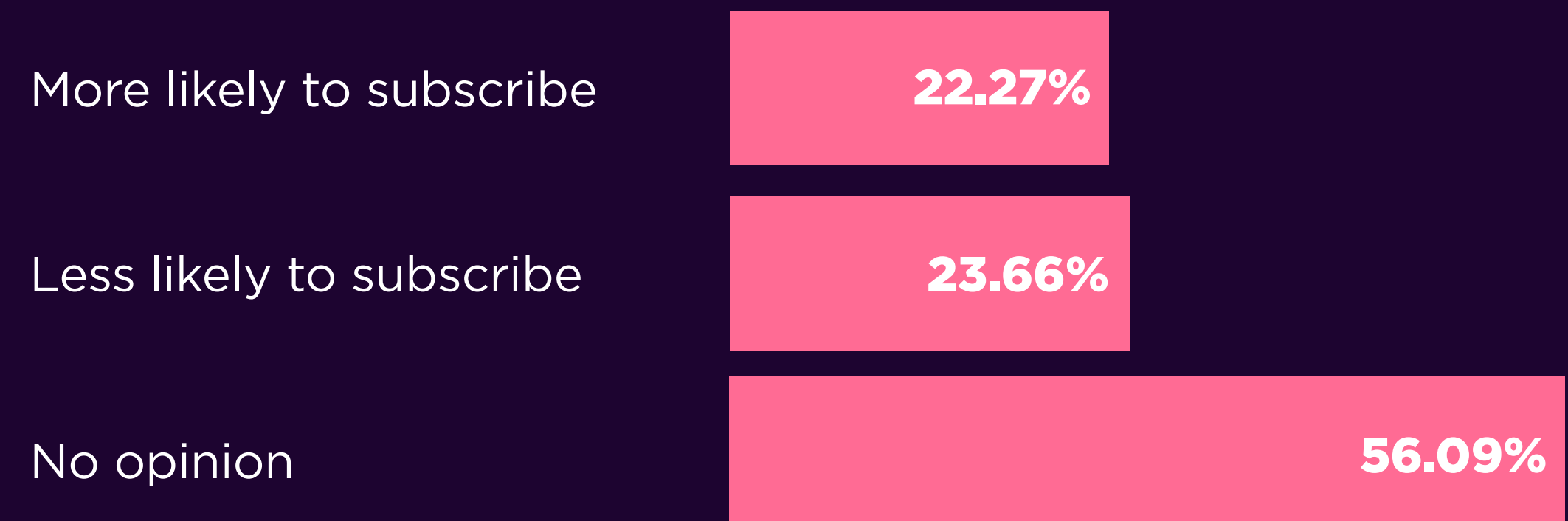


## INSIGHT

### **MORE WORK WOULD NEED TO BE DONE TO EDUCATE CONSUMERS ON THE VALUE OF A LEAGUE SUBSCRIPTION SERVICE IF GAMES CONTINUE WITHOUT CROWDS**

Opinion: Crowds are a major part of the sports experience, as a result, consumers do not understand what this “product” would look like. If a league is considering this as a strategy, they would need a strong communications campaign to show the viewing experience will not be dramatically disrupted.

### **IF SPORTING EVENT CANCELLATIONS CONTINUE, WOULD YOU BE MORE OR LESS LIKELY TO SUBSCRIBE TO A SUBSCRIPTION STREAMING SERVICE TO WATCH YOUR FAVORITE TEAMS AND LEAGUES?**





## INSIGHT

### THERE IS SUPPORT FOR RELEASING MOVIES DIGITALLY DURING THIS HEALTH CRISIS

Opinion: If you have been considering testing a new digital content strategy, now is the time. Viewership is up and consumers are hungry for more content. Viewership of OTT platforms, use of live streaming channels, and “hangouts” on video chat services are all seeing increases in numbers and new users testing out their services. Brands who can quickly shift marketing efforts towards these channels have a potential to capitalize on this increase in content consumption.

### SHOULD MOVIES CHANGE HOW THEY ARE RELEASED DURING A GLOBAL HEALTH CRISIS?

Yes, postpone movie releases until after the health crisis

36.43%

Yes, release online via subscription streaming services such as Netflix or Disney+

39.38%

No, they shouldn't change

24.19%



# WE ARE HERE TO HELP

Need clarity on this data or help applying it to your future strategy? We are available with our full-service capabilities during this difficult time. Please reach out to [jason@dreamhouselabs.com](mailto:jason@dreamhouselabs.com) with your questions or additional needs.

[CONTACT US](#)

**CUSTOM  
REPORTING**

**STRATEGIC  
CONSULTING**

**CREATIVE  
CONCEPTING**

**CONTENT  
PRODUCTION**

**MARKETING  
ACTIVATIONS**



# DREAM HOUSE <sup>LA</sup>

**HEAD OF STRATEGY**

**JASON FISHER**

**469-243-2240**

**[JASON@DREAMHOUSELABS.COM](mailto:JASON@DREAMHOUSELABS.COM)**

**EXECUTIVE CREATIVE DIRECTOR**

**SESH MOODLEY**

**US +1 424-341-9550**

**AUS +61 436317751**

**[SESH@DREAMHOUSELABS.COM](mailto:SESH@DREAMHOUSELABS.COM)**

**GENERAL MANAGER**

**STEPHEN BUCHANAN**

**480-252-4311**

**[STEPHEN@DREAMHOUSELABS.COM](mailto:STEPHEN@DREAMHOUSELABS.COM)**