

SPORTS: IMPACT OF THE PANDEMIC

SPECIAL EDITION

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SPECIAL EDITION

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INTRODUCTION

Consumer Behavior: Pandemic & Post-Pandemic was published by Richard K. Miller & Associates (RKMA) in June 2020. The impact of the pandemic for four consumer sectors is further assessed with the Pandemic Series, published by RKMA in September and October 2020. Titles are as follows:

- *Restaurants: Impact of the Pandemic*
- *Retail & E-Commerce: Impact of the Pandemic*
- *Sports: Impact of the Pandemic*
- *Travel & Tourism: Impact of the Pandemic*

COVID-19 was declared a national emergency in the United States on March 13, 2020. Where reference is made to the beginning of the pandemic in this Business Reference Ebook, this is the date of reference.

By mid-March, the CDC issued a warning against holding or attending gatherings larger than 50 people, including conferences, festivals, parades, concerts, sporting events and weddings. West Virginia reported its first COVID-19 case on March 17, marking the presence of the disease in all 50 states and the District of Columbia. And, California became the first to issue statewide Stay-at-Home Orders.

While no federal mandate has been put in place, 42 states, along with various counties and cities, the District of Columbia, the Navajo Nation, and Puerto Rico have mandated Stay-at-Home orders. The number of Americans under orders accounted for about 95% of the U.S. population, or roughly 316 million people.

Along with Stay-at-Home Orders, recommendations for wearing face masks or face coverings in public to lessen transmission of the virus were clarified by the CDC on April 3, 2020. Hygiene practices and appropriate physical distancing were also recommended.

Essential activities, such as shopping for food and basic goods, commuting to perform essential work, seeking medical attention, or participating in outdoor activities like dog-walking were generally permitted even with Stay-At-Home orders.

Orders effectively shuttered nearly all non-essential business operations, resulting in massive cuts to the workforce and sharp declines in consumer spending.

In general, essential businesses included supermarkets and grocers, big box retailers and super centers, convenience stores, restaurants for takeout and delivery only, pharmacies, hardware stores, office supply stores, and others. In some jurisdictions, liquor stores and cannabis dispensaries were considered essential.

With many bricks and mortar stores closed and people sheltering in place, online retail traffic rose dramatically.

By late summer, as the number of confirmed cases began to decline, states started lifting restriction and opening in phases. With distancing rules in place and mask mandates, some jurisdictions began allowing a return to gyms and salons, dining in at restaurants, visits to movie theaters and casinos, and more.

The severity of the pandemic shifted several times, affecting different communities with each surge. During the first wave, the number of new coronavirus cases peaked on April 10, 2020, with a 7-day average of 31,709 cases. Growth rose to a second peak of 66,690 (7-day average of new cases) on July 19, 2020.

In Fall 2020, the number of new coronavirus cases in the U.S. surged once again after growth slowed in late summer. This third surge peaked at 52,156 (7-day average of new cases) on October 13, 2020. While the geography of the pandemic shifted to the Midwest and to more rural areas, cases trended upward in most states, many of which set weekly records for new cases. Local governments imposed restrictions on activities, employers extended work-at-home policies, and schools shifted to remote learning in many of the affected cities and towns. Consumer spending and the economic recovery continued to stall as a result.

PART I: ANALYSIS

FINANCIAL IMPACT

1.1 Impact Of The Pandemic Shutdown

ESPN assessed the loss to major professional sports leagues, collegiate sports, and youth sports due to the pandemic shutdown at \$12 billion, distributed as follows:

- Fan spending on professional sports: \$3.25 billion
- Youth sports tournament travel: \$2.40 billion
- National TV revenue: \$2.20 billion
- All other: \$4.15 billion

“The meltdown is a fraction of the crisis spreading across the country, but it is nonetheless historic, touching every sector of the \$100 billion U.S. sports industry. From stadium authorities to youth sports complexes, from rec centers to global TV networks such as ESPN, the scale of devastation is only now coming into view. Some organizations, especially at the lower levels of sports, say they’ll be lucky to survive. The pain is especially acute among the army of low-wage service workers who support pro and college sports and are now unemployed. The losses are draining tax revenue that helps support local services such as police and firefighters and contributes to the quality of everyday life in thousands of communities.”

ESPN, 5/1/20

ESPN noted that the estimate was conservative because it was limited in scope. It did not include projected losses from NASCAR, golf, tennis and several minor sports, and gambling. The impact assessment also did not account for losses in the \$427 billion outdoor recreation industry, including hunting, skiing, recreational golf and tennis, and fishing. With sporting goods stores, golf courses, and fishing tournaments shut down in parts of the country, those revenues and jobs were also lost and not included in the impact assessment.

1.2 Cost Of Postponements And Cancellations

SportsBusiness Journal estimates the coronavirus-related postponements and cancellations of sporting events and games across the United States and Canada as of July 2020 had affected more than 116 million potential game-day attendees and led to the loss of \$6.0 billion in estimated event-related spending.

This assessment includes NBA, NHL, MLB (including spring training), MLS, WNBA, and XFL professional leagues; minor league baseball, basketball, hockey, and soccer leagues; and the NCAA men's and women's national basketball and hockey tournaments. Not included are events whose attendance is not tracked or publically reported, such as the Boston Marathon, NASCAR races, professional golf, and tennis tournaments.

As of July 13, 2020, the cancellation or postponement of a combined total of 19,044 sports events and games had been announced.

Cancellations and postponements affected at least 1.5 million attendees in 20 markets, as follows:

- New York, NY: 4.70 million
- Chicago, IL: 3.64 million
- Los Angeles, CA: 3.62 million
- Atlanta, GA: 2.66 million
- Minneapolis-Saint Paul, MN: 2.64 million
- Denver, CO: 2.40 million
- St. Louis, MO: 2.33 million
- Houston, TX: 2.32 million
- Boston, MA: 2.19 million
- Milwaukee, WI: 2.15 million
- Philadelphia, PA: 2.05 million
- Phoenix, AZ: 1.90 million
- Washington, DC: 1.89 million
- Anaheim, CA: 1.80 million
- Toronto, ON, Canada: 1.79 million
- Seattle, WA: 1.78 million
- San Francisco, CA: 1.72 million
- Cincinnati, OH: 1.64 million
- Arlington, TX: 1.63 million
- San Diego, CA: 1.62 million

1.3 Sports Travel

SportsBusiness Journal and Tourism Economics (www.tourismeconomics.com) estimate annual spending by travelers, event organizers, and venues on sports-related travel at \$45 billion. Up to 75% of this spending may be lost in 2020 due to the pandemic.

“COVID-19’s impact on tourism of any kind, let alone sports tourism, has been catastrophic. Very few American sporting events are taking place with fans inside venues, and some have been postponed or cancelled altogether.”

SportsBusiness Journal, 9/7/20

JOB LOSSES

2.1 Jobs Impacted

According to Emsi (www.economicmodeling.com), the pandemic shutdown impacted approximately 1.3 million sports jobs. The loss in earnings during the first three months of the pandemic was \$12.3 billion.

Jobs furloughed or terminated and the loss in earnings were as follows:

	Impacted Jobs	Earnings Loss
• Fitness trainers and aerobics instructors:	371,607	\$ 4.18 billion
• Coaches and scouts:	278,932	\$ 3.18 billion
• Amusement and recreation attendants:	192,889	\$ 1.14 billion
• Life guards, ski patrol, protective service:	158,281	\$ 996 million
• Recreation workers:	68,566	\$ 505 million
• Umpires, referees, sports officials:	28,430	\$ 303 million
• Gaming dealers:	26,448	\$ 159 million
• Sport fishing workers:	20,069	\$ 258 million
• Athletes and sports competitors:	17,565	\$ 349 million
• Agents, business managers:	15,151	\$ 310 million
• Entertainers, sports-related:	11,884	\$ 204 million
• Bicycle repairers:	11,312	\$ 86 million
• Hunters:	8,356	\$ 112 million
• Locker room attendants:	8,355	\$ 56 million
• Sportsbook writers and runners:	7,775	\$ 57 million
• Athletic trainers:	7,649	\$ 96 million
• Gaming service workers:	4,354	\$ 36 million
• Recreational service technicians:	3,897	\$ 39 million
• Dancers:	3,492	\$ 39 million
• Fish and game wardens:	3,221	\$ 48 million
• PA system announcers:	2,960	\$ 35 million
• Choreographers:	1,802	\$ 25 million
• Radio and TV announcers:	1,644	\$ 22 million
• Entertainment workers, other:	1,637	\$ 12 million
• Statisticians:	1,379	\$ 32 million
• Gaming surveillance:	919	\$ 8 million
• Ticket agents:	749	\$ 8 million
• Recreational therapists:	229	\$ 3 million
• Total:	1,259,552	\$12.272 billion

By age, impacted workers were as follows:

- 14-to-18: 155,334
- 19-to-21: 190,999
- 22-to-24: 175,157
- 25-to-34: 442,109
- 35-to-44: 321,059
- 45-to-54: 288,212
- 55-to-64: 239,672
- 65 and older: 135,599

The following states had the highest number of impacted workers:

- California: 240,000
- Florida: 164,000
- Texas: 144,000
- New York: 123,000
- Illinois: 77,000
- Pennsylvania: 76,000
- North Carolina: 75,000
- Ohio: 67,000
- New Jersey: 64,000
- Colorado: 61,000

The following metropolitan areas had the highest number of impacted workers:

- New York, NY: 126,000
- Los Angeles, CA: 76,000
- Chicago, IL: 63,000
- Dallas, TX: 46,000
- Miami, FL: 44,000
- Boston, MA: 43,000
- Philadelphia, PA: 43,000
- Washington, DC: 42,000
- Houston, TX: 38,000
- Phoenix, AZ: 37,000
- San Francisco, CA: 37,000
- Minneapolis, MN: 34,000
- Seattle, WA: 33,000
- Atlanta, GA: 32,000
- Charlotte, NC: 28,000
- Denver, CO: 26,000
- Detroit, MI: 25,000
- San Diego, CA: 25,000
- Tampa, FL: 23,000

2.2 PPP Loans To Sports Properties

Unemployment benefits and relief funds helped keep eligible workers financially afloat while they were awaiting rehiring or searching for another job. The \$2 trillion Coronavirus Aid, Relief, and Economic Security Act – dubbed the CARES Act – gave unemployed retail workers an additional cushion of \$600 a week through July 31, 2020, plus a one-time stimulus checks of up to \$1,200.

A centerpiece of the bill was the Payroll Protection Program (PPP), designed to help companies struggling with the impact of forced closures. Through the PPP, businesses could apply for federal loans that could be forgiven depending on whether workers remained on the payroll or were re-hired.

PPP loans to sports properties by industry category were as follows (source: *SportsBusiness Journal*):

	Loan Amount	Companies	Jobs Retained
• Motorsports:	\$78.50 million	65	3,946
• Minor league baseball:	\$69.95 million	90	5,515
• Horse racing:	\$60.05 million	45	4,114
• Youth sports:	\$43.70 million	82	3,492
• Sportsbooks:	\$42.05 million	13	1,521
• Agencies:	\$37.35 million	39	1,241
• National governing bodies:	\$34.20 million	30	1,106
• Team/league vendors:	\$32.81 million	21	884
• College:	\$26.95 million	27	1,401
• Minor league soccer:	\$26.00 million	34	1,162
• Venues:	\$23.85 million	21	2,314
• Golf:	\$23.75 million	13	1,105
• MLS:	\$17.35 million	7	715
• Sporting goods manufacturers:	\$13.10 million	11	629
• Rodeos:	\$12.70 million	5	390
• Architects:	\$12.00 million	3	399
• Minor league hockey:	\$10.00 million	23	576
• Esports:	\$ 9.40 million	10	389
• Media:	\$ 9.00 million	3	242
• State high school associations:	\$ 8.80 million	14	250
• Non-profit:	\$ 7.80 million	12	386
• Halls of fame:	\$ 6.35 million	5	365
• Tennis:	\$ 5.05 million	7	183
• Marathon:	\$ 5.00 million	1	288
• Other:	\$25.15 million	20	1,320

SPORTS BETTING

3.1 Overview

Since May 2018, when the Supreme Court struck down a law that limited sports betting primarily to Nevada, more than \$20.5 billion has been wagered in the 16 states that were taking bets prior to the pandemic, generating \$180 million in tax revenue, according to *Legal Sports Report*.

3.2 The Pandemic Shutdown

Sports betting in the U.S. retracted in March 2020 as virtually all sports events were cancelled during the pandemic shutdown.

On March 12, 2020, the NCAA Division I Men’s Championship Basketball Tournament, the second most popular event for betting (trailing only the Super Bowl), was cancelled. Nevada sportsbooks reported that wagers for March totaled \$141.2 million, a 76% year-over-year decrease and the lowest amount bet in the month of March since 1993.

While a few sportsbooks remained open and mobile wagering was accommodated, there were no major sports events to bet on.

“These days, hours sometimes pass without sportsbooks taking a single bet. Russian table tennis – one of a handful of niche events still standing – has emerged as one of the most popular betting markets at William Hill U.S. Sportsbook.”

ESPN, 5/1/20

The American Gaming Association (www.americangaming.org) estimated that shuttering gaming establishments for two months during the pandemic impacted

650,000 workers; \$43 million in economic activity was lost. (This assessment includes all casino activities, not just sports betting.)

With casino sportsbooks closed, sports betting increased dramatically online. In New Jersey, for instance, Gov. Phil Murphy ordered the state's casinos to close in mid-March 2020. Nearly 90% of the money bet in that month with New Jersey sportsbooks was placed online. While casino betting revenue declined, Internet gaming profits soared to \$64.8 million, a 65.6% increase from March 2019.

3.3 Wagering As Sports Resume Play

Sports betting picked up rapidly as MLB, the NBA, and the NHL resumed their seasons. By July 2020, wagers were roughly on par with the prior year. Sportsbooks then soared in August 2020. New Jersey reported its highest month ever, a \$668 million handle. Pennsylvania also reported record sports wagers. In Indiana and Iowa, sports wagers more than doubled in August 2020 compared to July 2020.

3.4 State Wagering Statistics

Among the 16 states that allow sports betting, wagering is highest in Nevada, New Jersey, Pennsylvania, and Indiana.

The Nevada Gaming Control Board (NGCB, www.gaming.nv.gov) reported year-over-year changes in gaming revenue as follows:

- February 2020: 32%
- March 2020: -76%
- April 2020: n/a*
- May 2020: n/a*
- June 2020: -28%
- July 2020: 23%
- August 2020: 55%

* The NGCB did not report sports betting statistics for April and May 2020.

State betting handles (i.e., total wagers) in New Jersey, Pennsylvania, and Indiana were as follows (source: state regulatory reports):

New Jersey

- February 2020: \$498.8 million
- March 2020: \$181.9 million
- April 2020: \$ 54.6 million
- May 2020: \$117.8 million
- June 2020: \$165.0 million
- July 2020: \$315.1 million
- August 2020: \$668.0 million

Pennsylvania

- February 2020: \$329.8 million
- March 2020: \$131.3 million
- April 2020: \$ 46.0 million
- May 2020: \$ 77.5 million
- June 2020: \$ 89.0 million
- July 2020: \$164.8 million
- August 2020: \$365.0 million

Indiana

- February 2020: \$187.1 million
- March 2020: \$ 74.8 million
- April 2020: \$ 29.8 million
- May 2020: \$ 37.3 million
- June 2020: \$ 29.8 million
- July 2020: \$ 70.9 million
- August 2020: \$169.0 million

4

SPORTS EVENTS

4.1 Live Professional Sports Events

According to a June 2020 survey by Monmouth University Polling Institute (www.monmouth.edu/polling-institute), U.S. adults missed watching live professional sports events during the pandemic as follows:

- Miss a lot: 32%
- Miss somewhat: 26%
- Do not miss at all: 42%

By age, adults missed sports events somewhat or a lot as follows:

- 18-to-34: 54%
- 35-to-54: 34%
- 55 and older: 39%

More men (37%) than women (27%) said they missed live pro sports a lot. Interestingly, 17% of those who do not consider themselves to be a sports fan still said they missed being able to watch live sporting events.

When asked what sport they missed most, responses were as follows:

- Baseball: 25%
- Basketball: 19%
- Football: 14%
- Hockey: 5%
- Soccer: 4%
- Golf: 3%
- Tennis: 2%
- Motor racing: 2%
- Boxing, UFC, MMA: 2%
- The Olympics: 2%
- Other: 2%

4.2 Fan Expectations

Surveys by Horizon Media (www.horizonmedia.com) asked the general U.S. adult population and avid sports fans about factors that would encourage them to return to live sports events. Responses were as follows:

	All Adults	Avid Fans
• Knowing that a vaccine has been released:	68%	81%
• Public health officials say it is okay to attend:	67%	76%
• Getting an all-clear from local government:	62%	71%
• Precautions taken for social distancing:	55%	63%
• Knowing employees received hygiene training:	52%	59%
• Personal doctor says it is okay to attend:	52%	58%
• Getting an all-clear from federal government:	51%	57%
• Hand sanitizer available for attendees:	51%	57%
• Additional safety & health measures implemented:	49%	57%
• Information from local news:	49%	58%
• Information from national news:	46%	51%
• Masks provided for attendees:	45%	50%

A May 2020 survey by Navigate Research (www.nvgt.com) found that 81% of adults that consider themselves at least a casual sports fan would be willing to return to games before a COVID-19 vaccine is in place, but most said they are most comfortable waiting at least six months. The average time before fans said they are willing to attend a game or event was as follows:

• Esports:	5.2 months
• MLS:	5.5 months
• PGA:	6.3 months
• MLB:	6.3 months
• College football:	6.4 months
• NASCAR:	6.5 months
• NHL:	6.6 months
• NFL:	6.6 months
• College basketball:	6.7 months
• NBA:	6.9 months

4.3 Fans Return To Events

In April and September 2020, The Harris Poll (www.theharrispoll.com) asked adults how soon they anticipated attending a sports event after the government provides information that the spread of the coronavirus flattened. Results were as follows:

	April 2020	September 2020
• Immediately:	8%	10%
• 1-to-30 days:	14%	12%
• 2-to-3 months:	20%	17%
• 4-to-6 months:	21%	17%
• 7-to-11 months:	14%	14%
• One year or more:	19%	24%
• Never again:	5%	7%

Responses by demographic in April 2020 were as follows:

	Immediately	1-10 Days	2-3 Months	4-6 Months	7-11 Months	One Year+	Never Again
Gender							
• Female:	6%	12%	18%	19%	17%	22%	7%
• Male:	9%	15%	22%	22%	11%	17%	3%
Age							
• 18-to-34:	10%	17%	24%	20%	15%	10%	4%
• 35-to-49:	8%	18%	20%	17%	12%	21%	4%
• 50-to-64:	6%	9%	18%	24%	15%	23%	5%
• 65 and older:	2%	7%	16%	25%	12%	29%	9%
Annual Income							
• Less than \$50,000:	8%	14%	19%	16%	12%	21%	10%
• \$50,000 to \$75,000:	9%	13%	17%	23%	10%	22%	7%
• More than \$75,000:	7%	14%	21%	23%	16%	17%	2%
All Adults:	8%	14%	20%	21%	14%	19%	5%

Responses in September 2020 were as follows:

	Immediately	1-10 Days	2-3 Months	4-6 Months	7-11 Months	One Year+	Never Again
Gender							
• Female:	9%	7%	17%	16%	14%	28%	9%
• Male:	11%	15%	17%	18%	14%	20%	5%
Age							
• 18-to-34:	11%	15%	20%	18%	13%	19%	4%
• 35-to-49:	11%	25%	20%	17%	13%	19%	5%
• 50-to-64:	11%	8%	10%	14%	16%	30%	12%
• 65 and older:	5%	5%	14%	20%	12%	33%	11%
Annual Income							
• Less than \$50,000:	10%	14%	12%	14%	13%	26%	11%
• \$50,000 to \$100,000:	10%	6%	20%	16%	15%	24%	7%
• More than \$100,000:	11%	14%	18%	19%	12%	22%	3%
All Adults:	10%	12%	17%	17%	14%	24%	7%

4.4 Sports Management

An assessment by Fox Sports recognized NASCAR (see Chapter 15) and horse racing (see Chapter 18) as the best in resuming their schedules for live sports events.

“I really think the two properties ... that managed the circumstances the best are NASCAR and horse racing. These are the two that, more than any others, have risen to meet this moment and have been able to put themselves probably in a better position for the future.”

Mike Mulvihill, Executive Vice President
Fox Sports
SportsBusiness Journal, 8/24/20

An April 2020 survey by MarketCast (www.marketcast.com) asked sports industry professionals which sports leagues displayed the most effective leadership across all of its constituents (i.e., athletes, fans, partners, media). Responses were as follows:

- NBA: 62%
- MLB: 8%
- NASCAR: 6%
- NFL: 4%
- NHL: 4%
- MLS: 1%
- Uncertain: 15%

4.5 Outlook

Navigate asked sports fans how they anticipate their sports-related behaviors will change once the pandemic is over, or at least after social distancing restrictions are lifted. Responses were as follows:

	Decrease	Same	Increase
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5

SPORTS MEDIA & ADVERTISING

5.1 Watching Sports On TV

Surveys in April and September 2020 by The Harris Poll (www.theharrispoll.com) asked adults about how much they missed watching sports on TV during the coronavirus shutdown.

Responses in April 2020 were as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	17%	18%	16%	50%
• Male:	32%	25%	16%	28%
Age				
• 18-to-34:	24%	24%	19%	33%
• 35-to-49:	28%	21%	16%	35%
• 50-to-64:	25%	20%	14%	40%
• 65 and older:	18%	19%	12%	51%
Annual Income				
• Less than \$50,000:	18%	19%	14%	48%
• \$50,000 to \$75,000:	23%	18%	9%	50%
• More than \$75,000:	28%	24%	19%	29%
All Adults:	24%	21%	16%	39%

Responses in September 2020 were as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	14%	17%	21%	45%
• Male:	25%	26%	13%	36%
Age				
• 18-to-34:	23%	25%	21%	32%
• 35-to-49:	24%	25%	16%	35%
• 50-to-64:	18%	16%	16%	49%
• 65 and older:	10%	17%	15%	58%

Annual Income

• Less than \$50,000:	14%	20%	18%	48%
• \$50,000 to \$100,000:	19%	18%	19%	44%
• More than \$100,000:	25%	26%	16%	34%
All Adults:	19%	21%	17%	42%

5.2 Alternatives To Live Sports During Shutdown

The *National Tracking Poll*, by Morning Consult (www.morningconsult.com), reported interest among adults in alternatives to live sports during the pandemic shutdown as follows (percentage of respondents):

• Sports documentaries:	27%
• News coverage of coronavirus impact on sports:	27%
• Classic sports games:	26%
• 'Best of' lists/countdown shows:	22%
• Content about how athletes are spending time at home:	21%
• Sports talk shows:	19%
• Basketball players competing in shooting contests:	17%
• Obscure sporting events (e.g., cornhole, paintball):	16%
• Live horse racing:	15%

The most-watched sports telecast during the pandemic shutdown was the NFL Draft: Round One, which garnered 15.26 million viewers on ABC, ESPN, and NFL Network.

Filling the void of live sports telecasts, ESPN aired *The Last Dance*, a 10-part docuseries following the Chicago Bulls' 1997-1998 season from start to finish and the career of Michael Jordan. The series took its name from a phrase coined by then-Bulls coach Phil Jackson, who knew that the season would likely be the final run for the core members of the 1990s Bulls dynasty. Viewership was as follows:

Telecast	Date	Viewers
• Part 1:	April 19, 2020	6.34 million
• Part 2:	April 19, 2020	5.79 million
• Part 3:	April 26, 2020	6.14 million
• Part 4:	April 26, 2020	5.66 million
• Part 5:	May 3, 2020	5.79 million
• Part 6:	May 3, 2020	5.21 million
• Part 7:	May 10, 2020	5.34 million
• Part 8:	May 10, 2020	4.92 million
• Part 9:	May 17, 2020	5.89 million
• Part 10:	May 17, 2020	5.41 million

5.3 Television Advertising

iSpot.tv reported advertising during televised sports programming from January 1, 2020 through June 7, 2020 was \$1.45 billion, down 30% year-over-year (YOY). Included in the assessment were commercials during live, time-shifted network and cable programming, video on demand, over-the-top, and local TV.

Nineteen (19) of the top 25 advertisers reduced their spending by double digits during the 23-week period.

The top sports programming advertisers were as follows (YOY change in parenthesis):

- Geico: \$138.4 million (-37%)
- State Farm: \$107.8 million (-6%)
- Verizon: \$106.2 million (-24%)
- Progressive: \$105.1 million (-31%)
- AT&T Wireless: \$ 71.0 million (-64%)
- T-Mobile: \$ 62.3 million (5%)
- Turbo Tax: \$ 61.3 million (5%)
- Taco Bell: \$ 59.0 million (-33%)
- McDonald's: \$ 51.4 million (-33%)
- USAA: \$ 48.4 million (-16%)
- Rocket Mortgage: \$ 47.6 million (-24%)
- Ford: \$ 46.3 million (-43%)
- Toyota: \$ 45.3 million (-46%)
- Chevrolet: \$ 45.0 million (-37%)
- Liberty Mutual: \$ 44.0 million (51%)
- Michelob Ultra: \$ 43.7 million (22%)
- Allstate: \$ 43.7 million (-20%)
- Pizza Hut: \$ 43.5 million (-13%)
- Bud Light Seltzer: \$ 43.5 million (n/a)
- Hyundai: \$ 43.2 million (-21%)
- Copper Fit: \$ 41.8 million (920%)
- Capital One Credit Card: \$ 40.5 million (-47%)
- Burger King: \$ 38.3 million (-38%)
- Wendy's: \$ 38.2 million (-42%)
- Apple iPhone: \$ 37.2 million (-62%)

5.4 Reallocation Of Advertising Spending

Coronavirus Effect On Advertising Report: Wave 6, by Advertiser Perceptions (www.advertiserperceptions.com), reported advertisers allocated sports ad spending with events being cancelled/postponed due to the pandemic as follows:

- Pulling the funds and not allocating them for spending right away: 38%
- Keeping the funds with the same media company and shifting to sports programming later in the year: 36%

- Keeping the funds with the same media company during the same time period but shifting to different, non-sports programming: 30%
- Keeping the funds with the same media company but not allocating them at the moment: 25%
- Keeping the funds with the same media company but shifting them to different, non-sports programming later in the year: 23%
- Moving the funds to a different media company: 14%

5.5 Market Resources

COVID-19 Impact on TV Advertising, iSpot.tv, August 2020.

(www.ispot.tv/ads/free-reports/covid-19-impact-on-tv-advertising/)

6

STADIUMS & ARENAS

6.1 Stadium Attendance

SportsBusiness Journal reported the stadiums with the largest projected loss in attendance as follows:

	Dates	Attendance	Gameday Revenue
• Dodger Stadium (Los Angeles Dodgers):	54	2.62 million	\$277.8 million
• Wrigley Field (Chicago Cubs):	53	2.00 million	\$251.5 million
• Fenway Park (Boston Red Sox):	53	1.91 million	\$226.3 million
• Yankee Stadium (New York Yankees, NYC FC):	69	2.57 million	\$212.9 million
• Minute Maid Park (Houston Astros):	53	1.82 million	\$190.7 million
• Busch Stadium (St. Louis Cardinals):	47	2.02 million	\$183.2 million
• Oracle Park (San Francisco Giants):	48	1.60 million	\$163.9 million
• Miller Park (Milwaukee Brewers):	55	1.93 million	\$159.2 million
• Nationals Park (Washington Nationals):	46	1.29 million	\$146.7 million
• Citi Field (New York Mets):	48	1.47 million	\$145.8 million

6.2 Arena Attendance

The arenas with the largest projected loss in attendance were as follows (source: *SportsBusiness Journal*):

	Dates	Attendance	Gameday Revenue
• Staples Center (Los Angeles Lakers, Clippers Kings):	47	740,500	\$84.6 million
• Madison Square Garden (New York Kings, Rangers):	17	315,800	\$56.2 million

• United Center (Chicago Bulls, Blackhawks):	14	281,700	\$51.0 million
• TD Garden (Boston Bruins, Celtics):	15	277,900	\$49.9 million
• Scotiabank Arena (Toronto Maple Leafs, Raptors):	25	388,300	\$48.6 million
• Wells Fargo Center (Philadelphia 76ers, Flyers):	25	389,100	\$42.4 million
• Capital One Arena (Washington Capitals, Wizards):	17	289,400	\$39.6 million
• American Airlines Center (Dallas Mavericks, Stars):	14	282,700	\$35.9 million
• Pepsi Center (Denver Avalanche, Nuggets):	25	407,400	\$35.4 million
• Toyota Center (Houston Rockets):	12	216,800	\$27.7 million

6.3 Concessions

Annual revenue from on-site game-day concessions at professional sports stadiums and arenas is approximately \$15 billion. Virtually all of this revenue is lost with games played without fans.

In the NBA alone, venues lose an average of \$350,000 per game in food and beverage sales, according to *SportsBusiness Journal*. That ranges from about \$250,000 for small markets like Memphis to \$700,000 for a major market like Golden State.

“Concessionaires wait, and hope, for games to return.”

SportsBusiness Journal, 4/16/20

6.4 Infectious Disease Prevention

In May 2020, the Global Biorisk Advisory Council (www.gbac.issa.com) introduced GBAC Star Facility Accreditation, an accreditation program on cleaning, disinfection, and infectious disease prevention.

Certified professional sports arenas and stadiums are as follows:

- Aarowhead Stadium (Kansas City, MO)
- American Airlines Arena (Miami, FL)
- AT&T Stadium (Arlington, TX)
- CenturyLink Field (Seattle, WA)
- Chase Center (San Francisco, CA)
- Fiserv Forum (Milwaukee, WI)
- Hard Rock Stadium (Miami, FL)
- Honda Center (Anaheim, CA)
- Lincoln Financial Field (Philadelphia, PA)
- Oracle Park (San Francisco, CA)
- Rocket Mortgage FieldHouse (Cleveland, OH)
- Spectrum Center (Charlotte, NC)
- Staples Center (Los Angeles, CA)
- Toyota Arena (Ontario, CA)

PART II: SPORTS: PANDEMIC & POST-PANDEMIC

MAJOR LEAGUE BASEBALL

7.1 The 2020 Season

Baseball teams were in the midst of spring training when Major League Baseball (MLB) announced on March 12, 2020, that the remainder of spring training was canceled and that the start of the regular season would be delayed. On March 16, 2020, MLB announced that the season would be postponed indefinitely, following recommendations from the Centers for Disease Control and Prevention to restrict events of more than 50 people. The 162-game regular season was originally scheduled to begin on March 26, 2020.

Spring training, rebranded as Summer Camp, resumed on July 1, 2020.

MLB and the Major League Baseball Players Association (MLBPA) agreed on a schedule to play a 60-game season, beginning on July 23 and ending on September 27. All U.S. teams played in their home stadium without spectators. The Canadian government denied permission for the Toronto Blue Jays to play their home games at Rogers Centre; the team played their home games at Sahlen Field in Buffalo.

An expanded 16-team postseason tournament began on September 29, 2020, with games of all but the first round being played at neutral sites. Seven games of the World Series were scheduled October 20 through October 28, 2020.

7.2 Safety Protocols

At the launch of the regular season MLB issued a 113-page manual to guide protection of players and staff from COVID-19 infections.

COVID-19 outbreaks among the Miami Marlins and St. Louis Cardinals, as well as positive tests among the Cincinnati Reds, New York Mets, Oakland Athletics, and San Francisco Giants, resulted in the postponement of a total of 40 games.

In August 2020, MLB tightened its health protocols in an effort to safely navigate the rest of its shortened season. In a six-page memo sent to teams and players, MLB added new areas in which players must wear masks, restricted the places players could visit outside the ballpark, and said players who do not abide by the rules would be subjected to discipline. The restrictions banned visits to bars, lounges, and malls, among other locations.

All players and staff members were required to wear face coverings over their mouths and noses at all times in stadiums, except for players on the field. Players and

staffers were also required to wear masks in all public places while traveling and at all times in hotels except when alone in their rooms. Surgical masks or N95/KN95 respirators were required while on planes or buses.

7.3 Television Viewership

Television viewership surpassed the 2019 season when MLB opened its 2020 season in July 2020.

According to Nielsen (www.nielsen.com), through the third weekend of MLB action, 39 million unique viewers have watched 59 telecasts (661,017 per game), compared to 26 million over 45 broadcasts (577,777 per game) through the same period in 2019.

ESPN's national MLB telecasts averaged 1.2 million viewers, up 29% from the 2019 season. Viewership on ESPN among the 18-to-34 age demographic increased 64% among men and 83% among women.

Four million viewers watched the first game of the shortened MLB season on July 23, 2020 (Washington Nationals vs. New York Yankees), the highest regular-season viewership on any network since 2011.

NATIONAL BASKETBALL ASSOCIATION

8.1 The 2019-2020 Season

The National Basketball Association (NBA) 2019-2020 regular season began on October 22, 2019 and was scheduled to end on April 15, 2020. The season was suspended on March 11, 2020, because of the the COVID-19 pandemic.

On June 4, 2020, NBA and the National Basketball Players Association (NBPA) approved a plan where 22 teams played eight additional regular season games to determine playoff seeding, and 16 teams entered post-season playoffs. The season restarted on July 31, 2020.

All regular season games following the restart and playoff games were played at Walt Disney World's ESPN Wide World of Sports Complex in Orlando, Florida. An isolation zone, dubbed the NBA Bubble, was created specifically created for NBA operations to ensure the health and safety of players, coaches, officials, and staff. This included regular testing for COVID-19 prior to and throughout the season restart, wearing a face covering or mask, and social distancing to prevent an outbreak of COVID-19 from occurring. All games were played without spectators.

According to ESPN, a league TV partner and host of the bubble campus, the NBA spent roughly \$150 million to build the site. The cost to host an individual at the Orlando location was approximately \$60,000 per person, including daily COVID-19 testing.

8.2 Revenue Impact

Gate revenue for most NBA teams ranges between \$1 million and \$2.5 million per game. For large-market teams such as the Golden State Warriors, Los Angeles Lakers, and New York Kincks, per game ticket revenue is between \$3 million and \$4 million. Non-ticket revenue is \$500,000 to \$700,000 per game; per cap food and beverage purchases are estimated at \$14 to \$22.

At the time the NBA season was suspended in March 2020, there were still 259 games left in the 2019-2020 NBA regular season.

Combined league gate revenues lost as a result of these cancellations was estimated at between \$350 million and \$450 million. Non-ticket revenue losses including food and beverage, merchandise sales, and parking fees were estimated at \$200 million.

8.3 Television Viewership

The resumption of the 2019-2020 NBA season kicked off with a doubleheader on Turner Sports' TNT network. The Los Angeles Lakers vs. L.A. Clippers game had an average of 4.1 million viewers, according to Nielsen (www.nielsen.com). The New Orleans Pelicans vs. Utah Jazz game averaged 2.1 million viewers. This viewership was up 109% over TNT's average before the league suspended its season in March.

In a doubleheader on ABC Sunday, the Milwaukee Bucks vs. Houston Rockets game averaged 2.44 million viewers; Portland Blazers vs. Boston Celtics averaged 1.66 million viewers. Both viewerships were below the network's pre-hiatus average of 3.20 million.

For the opening weekend, viewership averaged 1.86 million viewers across ABC, ESPN and TNT, up 14% from the networks' average of 1.63 million before the pandemic.

Through the end of the regular season, NBA viewership post-shutdown was up 8% compared with spring 2019 end-of-season games.

NATIONAL FOOTBALL LEAGUE

9.1 The 2020 Season

The National Football League (NFL) had the good fortune of being in its off-season in March 2020, when the sports world shut down. The 2020 NFL season opened on September 10, as originally scheduled and without modification because of the pandemic.

Unlike the NBA in Florida, the NHL in Edmonton and Toronto, and the WNBA, also in Florida, the NFL did not play the 2020 season in a protective "bubble." The 32 teams played in their home cities with travel as in normal seasons.

The NFL and National Football League Players Association (NFLPA) jointly developed guidelines to minimize the risk of COVID-19 infection. The league and the NFLPA strongly recommended, but did not require, players to wear masks while on the sidelines. All coaches and staff members in their team's bench area are required to mask up throughout the league. Because of local mandates, everyone on the sidelines, players included, have to wear masks at San Francisco 49ers and Buffalo Bills home games. Guidelines were also promulgated to minimize off-field exposure.

NFL players had the choice to opt out of the 2020 season due to concerns about the coronavirus pandemic. As of August 8, 2020, the deadline for opting out, 67 players from 29 NFL teams had chosen to miss the season. Players with preexisting conditions received a \$350,000 stipend and those who opted out for others reasons received \$150,000.

The NFL and NFLPA administered some 17,519 COVID-19 tests to 2,641 players during the pre-season (August 30, 2020 to September 5, 2020); there was one confirmed positive test result. Testing continued throughout the regular season.

9.2 Fan Response

In a September 2020 survey by Morning Consult (www.morningconsult.com), 42% of U.S. adults said they were less excited about the 2020 season than the prior year. Reasons were as follows:

- Increased political activism: 36%
- Absence of fans in stadiums: 19%
- Inability to gather with friends to watch games: 17%

9.3 Fans Return To Stadiums

Without a directive from the league but with respect to state mandates, NFL teams were allowed to make their own decision regarding spectator attendance at home games. Plans as of August 27, 2020, were as follows (source: *SportsBusiness Journal*):

- Arizona Cardinals: No decision
- Atlanta Falcons: No fans through September
- Baltimore Ravens: No fans for season opener
- Buffalo Bills: No fans through September
- Carolina Panthers: No decision
- Chicago Bears: No fans for season opener
- Cincinnati Bengals: No fans until further notice
- Cleveland Browns: No decision
- Dallas Cowboys: No decision
- Denver Broncos: No fans for season opener
- Detroit Lions: No fans through October
- Green Bay Packers: No fans first two games
- Houston Texans: No fans through September
- Indianapolis Colts: Reduced capacity
- Jacksonville Jaguars: 25% capacity
- Kansas City Chiefs: 22% capacity
- Las Vegas Raiders: No fans
- Los Angeles Rams: No fans until further notice
- Los Angeles Chargers: No fans until further notice
- Miami Dolphins: 13,000 fans
- Minnesota Vikings: No fans through September
- New York Giants: No fans until further notice
- New Orleans Saints: No fans for season opener
- New York Jets: No fans until further notice
- New England Patriots: No fans through September
- Philadelphia Eagles: No fans until further notice
- Pittsburgh Steelers: No fans first two games
- San Francisco 49ers: No fans for season opener
- Seattle Seahawks: No fans first three games
- Tampa Bay Buccaneers: No decision
- Tennessee Titans: No fans through September
- Washington: No fans

9.4 TV Viewership

TV viewership for Sunday Night Football, telecast on NBC, and Monday Night Football, telecast on ESPN, during the first four weeks of the 2020 NFL season was as follows (source: *Sports Media Watch*):

	Sunday Night Football	Monday Night Football
Week 1:	18.94 million (-15%)	10.76 million (-18%)
Week 2:	17.69 million (0.3%)	15.59 million (32%)
Week 3:	17.80 million (-4%)	14.02 million (32%)
Week 4:	15.08 million (-37%)	8.65 million (-17%)

9.5 Wagering On NFL Games

According to a September 2020 survey by the American Gaming Association (AGA; www.americangaming.org), 33.2 million U.S. adults, or approximately 13% of all U.S. adults, plan to bet on NFL games during the 2020 season. Among these bettors, anticipated types of wagering are as follows:

- Fifty percent (50%; 16.6 million adults) will bet casually with friends, family, or coworkers, down from 53% in 2019.
- Thirty-four percent (34%; 11.3 million adults) will place a bet through legal and illegal online platforms, up from 29% in 2019.
- Twenty-six percent (26%; 8.6 million adults) will bet casually through pools, fantasy contests, and squares, down from 31% in 2019.
- Twenty percent (20%; 6.6 million adults) will wager at physical, legal sportsbooks, up from 18% in 2019.

Previous AGA surveys found that 93% of sports bettors are more interested in the NFL than any other professional sports league. The NFL gains \$2.3 billion annually from legal sports betting, largely due to increased fan engagement.

NATIONAL HOCKEY LEAGUE

10.1 The 2019-2020 Season

On March 12, 2020, the National Hockey League (NHL) announced that the 2019-2020 season would be suspended indefinitely due to the coronavirus.

At the time the season was suspended, the teams of the NHL had each played between 32 and 37 of their allocated 41 home games. It is estimated that each team lost an average of \$1.31 million in ticket sales for each home game that was canceled.

On May, 26, 2020, the NHL and the National Hockey League Players' Association agreed on a basic framework to stage the Stanley Cup playoffs without spectators. The seeds would be based on each club's points percentage when the season paused on March 12. Remaining regular season games were cancelled; the 2019-2020 season effectively ended on March 11, 2020.

Because of delays to the 2019-2020 season, the 2020-2021 season was postponed until December 1, 2020, or later.

10.2 Playing Without Fans

The NHL derives roughly 37% of its total revenue from ticket sales. That compares to 27% for MLB, 22% for the NBA, and 16% for the NFL. While the other major leagues can make a profit without selling any tickets because of their network contracts, the NHL loses money.

COVID-19 rendered televised games and online channels the only options for fans to watch the 2020 playoffs. The NHL has always struggled to win over new TV viewers beyond hardcore hockey fans due to difficulty following the puck and players on a television screen.

“While the NHL boasts a thrilling live experience, it has faced a continual dilemma with its television product: Hockey isn’t designed for the small screen. Advancements in technology, such as high definition, have helped, but issues persist. The puck is small and can be tough to follow. Substitutions are fluid and hard to track. Without a common understanding of the rules, the game action can be overwhelming.”

CNBC, 8/1/20

10.3 Playoffs And Stanley Cup Finals

On July, 10, 2020, the NHL announced that the games for the 2020 Stanley Cup playoffs would be hosted in two hub cities, Edmonton, and Toronto. Toronto’s Scotiabank Arena was host for the Eastern Conference playoff qualifier games, quarterfinals, and semi-finals. Edmonton’s Rogers Place was named host for the same rounds for the Western Conference, in addition to both conference’s finals and the 2020 Stanley Cup Final. Isolation protocols, dubbed “bubbles,” were set up governing camp operations and the environment around where games were played.

The Stanley Cup playoff qualifiers began on August 1, 2020. The league conducted over 7,000 tests for COVID-19 during the first week of return-to-play, with the NHL reporting no positive cases. The playoff qualifiers were concluded on August 9, with the first round of the Stanley Cup playoffs beginning the following day.

10.4 Television Viewership

According to *Sports Media Watch*, the NHL averaged 844,000 viewers for playoff games in rounds before the Stanley Cup Final, a 28% drop from 2019 and the lowest since NBC’s networks began airing all playoff games as part of the NHL’s TV deal with the network that started in 2012. Of the 11 conference final games, just one had increased viewership from 2019.

The six games of the 2020 Stanley Cup finals averaged 2.03 million viewers, down 62% from 5.33 million average viewership over 7 games in 2019. Viewership by game was as follows:

	2019	2020
• Game 1:	5.25 million	2.11 million
• Game 2:	3.39 million	1.14 million
• Game 3:	2.93 million	1.14 million
• Game 4:	5.23 million	2.22 million
• Game 5:	5.44 million	2.71 million
• Game 6:	6.47 million	2.88 million
• Game 7:	8.72 million	

Tampa Bay Lightning defeated the Dallas Stars in Game 6 to win the 2020 Stanley Cup. It was the least-watched clincher since the 2004-2005 lockout.

MAJOR LEAGUE SOCCER

11.1 The 2020 Season

The Major League Soccer (MLS) 2020 regular season began on February 29, 2020. Play was suspended on March 12, 2020, due to the COVID-19 pandemic.

Players were allowed to resume individual outdoor training at MLS facilities on May 6, 2020. On July 8, 2020, play resumed with the MLS is Back Tournament. The regular season schedule resumed on August 12, 2020.

Games after the season resumed following the suspension were played without fans, or with artificially reduced attendance. Teams set their own attendance limits based on local, regional and state regulations during the pandemic.

The MLS Cup 2020 is scheduled to start on December 12, 2020.

11.2 MLS Is Back Tournament

The MLS is Back Tournament provided a high-profile restart for MLS to resume its 25th season. The bracket-format competition at the ESPN Wide World of Sports Complex at Walt Disney World Resort in Florida, was held July 8 to August 11, 2020. Games counted towards the regular season ranking.

On July 6, 2020, FC Dallas withdrew from the tournament due to ten players and one staff member of the club testing positive for COVID-19. On July 9, 2020, Nashville SC were also withdrawn from the tournament after nine players of the club tested positive for the virus.

Each of the remaining 24 teams played three group stage matches. After 16 consecutive days of group stage matches, the top two teams from each group along with the four best third-place finishers moved on to the quarter-finals, semi-finals, and the championship match, which took place on August 11, 2020. Players earned bonuses via a \$1.1 million prize pool.

WOMEN'S NATIONAL BASKETBALL ASSOCIATION

12.1 The 2020 Season

The 2020 Women's National Basketball Association (WNBA) season was played without fans present at IMG Academy in Bradenton, Florida. The season opened on July 25, 2020, postponed from May 15, 2020.

Because of the pandemic, the WNBA reduced the 2020 regular season from what was to have been a record 36 games to a league low 22. Each of the 12 teams played the others twice with the regular season ending September 12, 2020, eight days before the originally scheduled close to the longer season.

Like in recent years, eight teams advanced to the playoffs, which culminated with a best-of-5 Finals series in early October.

12.2 Regular Season Television Viewership

The national TV schedule for the 2020 season was the largest ever for the WNBA, with 37 games already on ABC/ESPN/ESPN2 and 40 games on CBS/CBS Sports Network. Other games were carried on NBA TV and locally on Fox Sports networks.

The regular season averaged 205,000 viewers across ESPN, ESPN2 and ABC (37 telecasts), down 16% from 246,000 in 2019.

The Wings-Mercury regular season game on August 18, 2020, averaged 599,000 viewers on ABC, marking the league's largest regular season audience on any network since 2012.

12.3 WNBA Finals Television Viewership

ESPN broadcast the 2020 Women's National Basketball Association finals, as the Seattle Storm defeated the Las Vegas Aces in three games. Viewership was as follows (change from prior year in parenthesis):

- Game 1: 234,000 (4%)
- Game 2: 499,000 (-9%)
- Game 3: 570,000 (34%)

Game 3 was the clincher for the 2020 finals, while in 2019 the series was tied 1-1 for Game 3. Comparing the clincher in 2019, Game 5, with the clincher in 2020, Game 3 was up 27%.

MINOR LEAGUE BASEBALL

13.1 The 2020 Season Cancelled

On June 30, 2020, Major League Baseball (MLB) informed Minor League Baseball (MiLB) that it would not be providing its affiliated Minor League teams with players for the 2020 season. As a result, the 2020 Minor League Baseball season was cancelled.

Players under contract to MLB teams either participated in their team's alternate site workouts, played for independent league clubs, or sat out the 2020 season.

The American Association, an independent minor league not part of the MiLB system, played the 2020 season. Based in North Dakota and South Dakota, the American Association stadiums were in a region where COVID-19 incidence rates were low. The six-team league opened the season on July 4, 2020, playing with fans wearing face masks and practicing social distancing.

13.2 Restructuring Minor League Baseball

Minor League Baseball will likely be restructured before play resumes in 2021. MLB had announced prior to the pandemic that they wanted a change in the way the MiLB was operated.

MiLB has always been independent of MLB, which has provided players and coaches to MiLB teams through affiliation agreements. Under this arrangement, MLB teams pay the costs of the players and coaches and MiLB teams handle the business of operating games and providing facilities. The entire relationship has been governed for decades by Professional Baseball Agreements (PBA).

In November 2019, MLB proposed having 120 full-season teams (30 teams in each of four full-season leagues) and the elimination of short-season and rookie-level teams outside of the Gulf Coast, Arizona, and Dominican Summer leagues. This would eliminate 42 currently-existing minor-league teams. Under the proposal, MLB would take over governance and all aspects of running the day-to-day operations of the minor leagues. MLB would deal with individual MiLB owners on a franchisor-franchisee system.

The pandemic gave MLB the upper hand in negotiations as MiLB club owners were struggling with the financial impact of the cancelled 2020 season.

“Minor league baseball ... finds itself bracing for seismic change: After 119 years of operating as an independent entity, MiLB will ultimately accede to Major League Baseball’s plan for a new governing structure, according to sources on both sides of the negotiations. As a result, MiLB will be brought under MLB’s umbrella to restructure the minor-league business-side model. Against the backdrop of the cancellation of the season due to the COVID-19 pandemic, MiLB is resigned to MLB’s proposal to contract it from 160 to 120 affiliated teams.”

SportsBusiness Journal, 9/7/20

14

INDYCAR

14.1 Postponed Races; Revised Schedule

The pandemic forced postponement of the IndyCar Series in March 2020, just 48 hours before the opening race in St. Petersburg, Florida.

Almost three months later, the 2020 racing season opened on June 6 at Texas Motor Speedway, with NBC's first primetime IndyCar race. The race was held without spectators.

Grand Prix at Road America, held July 11-12, 2020, was the first race with fans.

The revised schedule consisted of 14 races at seven racetracks with five doubleheader weekends. The season closed on October 25, 2020, with the Grand Prix of St. Petersburg, originally scheduled to be the opening race.

14.2 Indianapolis 500

The Indianapolis 500, dubbed the "Greatest Spectacle In Racing," was held August 23, 2020, rescheduled from May 24.

In June 2020, Indianapolis Motor Speedway announced that the race, which typically attracts over 300,000 fans annually, would be limited to half-capacity. That was revised in July 2020 to 25% capacity for fans, with mandatory face coverings for everyone in attendance. Two weeks before the race, Indianapolis Motor Speedway announced closure of its grandstands for the 104th running of the race. Racing without fans and the cancellation of the 500 Festival and associated weekend events cost the city of Indianapolis an estimated \$340 million economic impact.

Broadcast on NBC, viewership for the 104th Indianapolis 500 was 3.73 million (2.3 household rating), down from 5.49 million viewers (3.4 million household rating), according to Nielsen (www.nielsen.com). It was the Indianapolis 500's lowest-ever TV ratings. The drop was attributed to competition from the NBA playoffs, PGA golf, and NASCAR as well as the move from the usual Memorial Day Weekend slot to August.

The following were top local markets for the 104th Indy 500 (source: Nielsen [www.nielsen.com]):

- Indianapolis, IN: 24.9 household rating
- Cincinnati, OH: 4.1 household rating
- Columbus, OH: 4.1 household rating
- Las Vegas, NV: 4.1 household rating
- Nashville, TN: 3.8 household rating

- Hartford-New Haven, CT: 3.7 household rating
- Milwaukee, WI: 3.6 household rating
- West Palm Beach, FL: 3.6 household rating
- Sacramento-Stockton, CA: 3.3 household rating
- Tampa-St. Petersburg, FL: 3.3 household rating

14.3 IndyCar-NASCAR Doubleheader

IndyCar and NASCAR Xfinity Series presented a historic first doubleheader weekend at Indianapolis Motor Speedway on July 4, 2020. Both races were without fans and broadcast by NBC.

The GMR Grand Prix drew an average of 1.14 million viewers across a two-hour broadcast, making it NBC Sports' best-ever afternoon race. The race had a TV-only peak of 1.306 million viewers. The top local markets were as follows (source: Nielsen):

- Indianapolis, IN: 4.87 household rating
- West Palm Beach, FL: 1.90 household rating
- Cincinnati, OH: 1.66 household rating
- Nashville, TN: 1.65 household rating
- Tampa-St. Petersburg, FL: 1.64 household rating
- Las Vegas, NV: 1.64 household rating

The NASCAR Xfinity Series Pennzoil 150 averaged 1.69 million viewers, making it the most-watched Xfinity race from the Brickyard since 2017 and up 21% from the series' four races on NBC in 2019. TV-only viewership peaked at 1.99 million viewers. The top local markets were as follows (source: Nielsen):

- Indianapolis, IN: 5.12 household rating
- West Palm Beach, FL: 3.04 household rating
- Nashville, TN: 2.66 household rating
- Cincinnati, OH: 2.59 household rating
- Greensboro-High Point, NC: 2.51 household rating

15

NASCAR

15.1 Overview

NASCAR (www.nascar.com) held four races prior to the suspension of its schedule after the FanShield 500 (March 8, 2020 at Phoenix Raceway) because of the pandemic. Racing resumed May 17, 2020, with The Real Heroes 400 (Darlington Raceway). The schedule was revised to accommodate the full 36-race campaign.

“The stock car series was one of the first sports to return during the pandemic.”

SportsBusiness Journal, 8/31/20

As of September 2020, NASCAR was one of the few sports not doing uniform coronavirus testing of all participants. Only those showing symptoms get tested, a stark contrast from other leagues.

“There has not been any apparent outbreak to suggest the measures in place aren’t working.”

SportsBusiness Journal, 8/31/20

15.2 TV Broadcasts

Viewership for the first nine races after restart from the pandemic shutdown and, for comparison, viewership before the pandemic were as follows (source: *SportsBusiness Journal*):

Race Date (Track)	Network	Viewers
• February 17, 2020 (Daytona):	Fox	7.03 million
• February 23, 2020 (Las Vegas):	Fox	5.50 million
• March 1, 2020 (Auto Club):	Fox	4.79 million
• March 8, 2020 (Phoenix):	Fox	4.58 million
• May 17, 2020 (Darlington):	Fox	6.32 million
• May 20, 2020 (Darlington):	FS1	2.09 million
• May 24, 2020 (Charlotte):	Fox	3.93 million
• May 28, 2020 (Charlotte):	FS1	1.51 million
• May 31, 2020 (Bristol):	FS1	2.93 million
• June 7, 2020 (Atlanta):	Fox	3.96 million
• June 10, 2020 (Martinsville):	FS1	1.71 million
• June 14, 2020 (Homestead-Miami):	Fox	2.78 million
• June 22, 2020 (Talladega):	Fox	3.36 million

“It’s clear that a pent-up demand for sports viewers exists. But that demand only lasts for a couple of weeks before ratings return to normal.”

SportsBusiness Journal, 6/29/20

15.3 Fans Return

Fans returned to races on July 15, 2020, with the NASCAR All-Star Open at Bristol Motor Speedway. The state of Tennessee gave Bristol race organizers the green light to sell up to 30,000 tickets, with spectators spread out for social distancing. While privately held NASCAR venues, like Bristol, are not obligated to publically disclose ticket sales, observers estimated that the number of spectators reached the full 30,000 limit. It was the biggest crowds since the coronavirus pandemic halted sports in March 2020. The speedway, dubbed “The Last Great Colosseum,” can accommodate more than 140,000 spectators.

Foxwoods Resort Casino 301, held August 2, 2020, at New Hampshire Motor Speedway, was allowed to sell 12,000 tickets. The race required digital tickets, face coverings, and socially distanced seating. Concession stands provided contactless service; patrons scanned a QR code to select items on the menu.

As of September 2020, no COVID-19 outbreaks had been publically linked to any of the NASCAR races that have had fans.

GOLF TOURNAMENTS

16.1 Postponements And Rescheduling

The PGA Tour took a 12-week hiatus because of the COVID-19 pandemic. On March 12, 2020, midway through the first round of the 2020 Players Championship, the PGA Tour announced cancellation of the remainder of the tournament and the next three events. Postponements continued through June 2020. The Charles Schwab Challenge was the first tournament back, with play running the week of June 8-14, 2020. The postponed tournaments were repositioned on the PGA Tour schedule, which ended on Labor Day (September 7, 2020).

Many elite golf tournaments, both professional and amateur, were postponed or canceled in response to the pandemic, including the major championships. On March, 13, 2020, it was announced that the Masters Tournament (scheduled for April 9-12) had been postponed until August 6-9, 2020. The 2020 PGA Championship (scheduled for May 11-17) was postponed the following week. On April 6, 2020, the cancellation of the 2020 Open Championship was announced, the first cancellation since World War II. This was soon followed by the the United States Golf Association (USGA, www.usga.org) announcing the rescheduling of the 2020 U.S. Open from June 18-21 to September 17-20 (the week before the 2020 Ryder Cup, which itself was postponed for a year when organizers chose cancellation to playing the event without spectators). The ladies majors were similarly affected, with the LPGA Tour postponing the ANA Inspiration until September 2020.

With the disruption and rescheduling of its majors (the U.S. Open in September and the U.S. Women's Open in December), the USGA and Fox agreed to terminate their broadcast rights contract. USGA rights were re-awarded to Golf Channel, which split telecasts between NBC and Golf Channel.

When PGA Tour play resumed in June, it was announced that the first four events would be closed to the general public. On July 14, 2020, it was announced that the remainder of the PGA Tour schedule would be played without fans, galleries, or pro-am events.

16.2 Impact on Hospitality and Sponsorships

The business model of PGA Tour events relies heavily on hospitality, sponsorship, tickets, and pro-ams to drive revenue. This revenue, in turn, allows donations to the many charities that the tournaments support. The Charles Schwab

Challenge, for instance, generates between \$5 million and \$6 million from its hospitality and two pro-am events. The tournament donated \$14 million to charities in 2019. This revenue was lost in 2020, although most sponsors still contributed some level of donation.

“Fanless events mean no hospitality revenue and the pro-ams that raise millions for charities. Tournaments have been busy crafting everything from added digital branding to virtual pro-ams to maintain at least a small portion of that revenue.”

SportsBusiness Journal, 5/11/20

16.3 U.S. Open

The final round of the 2020 U.S. Open, broadcast on NBC on September 20, drew 3.21 million viewers, a 56% drop from 7.21 million viewers for the 2019 final round broadcast on FOX. It was the fewest viewers for the final round of that tournament in 33 years. The low viewership was attributed, in part, to competition from NFL Sunday games.

The U.S. Open generates \$170 million in revenue, according to the USGA, with \$51 million (30% of the total) coming from tickets, hospitality, and on-site merchandise revenue, all of which was lost with the tournament being played without spectators because of the pandemic.

TENNIS TOURNAMENTS

17.1 Postponements And Rescheduling

In one of the first major U.S. sport cancellations of the pandemic, the 2020 BNP Paribas Open tennis tournament in Indian Wells, California, was postponed on March 8, 2020 as a precautionary measure due to the rising cases in California.

On March 12, 2020, the Miami Open was cancelled pursuant to the state of emergency in Miami-Dade County.

The Association of Tennis Professionals Tour (ATP) announced on March 12, 2020, the suspension of all events for at least six weeks. On March 16, 2020, the Women's Tennis Association Tour (WTA) suspended play through May 2, 2020. The ATP and WTA later suspended tournaments through June 7, 2020, then extended the suspension through August 3, 2020.

On March 16, 2020, the start of the 2020 French Open was postponed from May 24 to September 20, 2020.

On April, 1, 2020, Wimbledon was canceled for the first time since World War II.

The US Open (www.usopen.org), the final event of the US Open Series, was originally scheduled for August 31 - September 13, 2020 at the USTA Billie Jean King National Tennis Center in Flushing Meadows, New York. On June 16, 2020, Governor Andrew Cuomo announced that it had authorized the US Open to be played in New York on its original dates, subject to safety protocols developed by the USTA and being closed to spectators. It was also announced that to reduce travel, the preceding Cincinnati Masters (Western & Southern Open) would be re-located to the same venue as the US Open, with both tournaments held over consecutive weeks.

17.2 US Open

In a normal year, the US Open tennis tournament generates some \$400 million for the United States Tennis Association (USTA, www.usta.com) and an estimated \$750 million in economic activity, according to a study commissioned by the USTA.

“The US Open is the first major sports event in New York City since the pandemic started, but without fans in place, the \$750 million it typically generates in economic impact will be severely dented.”

SportsBusiness Journal, 9/7/20

Players were subject to frequent coronavirus testing. Most were lodged together at a hotel outside Manhattan, and restrictions were placed on their activities to protect their health.

ESPN pays more than \$70 million annually in rights fees to the USTA, mainly to televise the US Open.

The 2020 US Open averaged 700,000 viewers on ESPN, down 45% from 1.28 million in 2019. The Women’s Final, in which Japan’s Naomi Osaka beat Belarusian Victoria Azarenka, averaged 2.15 million viewers, down 43% from the prior year. The Men’s Final, in which Austria’s Dominic Thiem won his first grand slam by beating Germany’s Alexander Zverev, averaged 1.48 million viewers, a drop of 46% from 2019 and down 29% from 2018. Thiem’s five-set win was the second least-watched men’s final on record.

HORSE RACING

18.1 Races During The Shutdown

Unlike all other sports, horse racing never shut down during the pandemic. While some tracks were closed temporarily in March and April 2020, there was at least one track in the U.S. where horses were running every weekend in 2020.

According to Equibase (www.equibase.com), there were 1,699 race days during the first seven months of 2020, a 34.4% drop from 2,588 races during the same period in 2019. From January through July 2020, the handle (i.e., total wagers) was \$61.5 billion, a 7.0% drop from 2019.

Wagers did not decline proportionately with the drop in race days because bettors wagered more virtually. The amount wagered per race increased 41.7% in 2020, from \$2.56 million to \$3.62 million, according to Equibase.

Wagering on races in 3Q 2020 was \$3.29 billion, a 12.7% increase from 3Q 2019. Saratoga Race Course topped \$700 million in handle for a second straight year, nearly matching the 2019 record handle of \$705.3 million. The summer's other big meet, Del Mar, had an 8% increase in wagering to \$466.7 million despite offering 25% fewer race days in 2020.

18.2 Triple Crown

The Triple Crown consists of the Kentucky Derby, run the first Saturday in May, followed by the Preakness Stakes two weeks later and the Belmont Stakes three weeks after that. All three races were postponed in 2020.

The Kentucky Derby was rescheduled for September 5, followed by the Preakness Stakes on October 3.

The Belmont Stakes, typically the last of the Triple Crown races, became the first race when it was held on June 20.

All three races were run without spectators.

18.3 Belmont Stakes

The 2020 edition of the Belmont Stakes was run at a mile and an eighth, shortened because many horses didn't have the opportunity to prepare for a more enduring race. The race is normally contested at 1½ miles, or 12 furlongs, making it the longest of the Triple Crown races and typically the longest race that Thoroughbreds ever run.

The race had strict health protocols, including taking the temperature of everyone entering the track. NBC had two analysts and a race caller onsite; all other media and reporters were required to work remotely.

Including streaming viewership, the 2020 Belmont Stakes averaged 3.3 million viewers and peaked at 4.0 million viewers. It was the smallest TV audience for the race since 1993 and the least-watched Triple Crown race ever on NBC. Despite the historic lows, the Belmont was the most-watched sportscast of Father's Day weekend. It topped the NASCAR rainout coverage on FOX (2.0 million viewers) and the final round of the PGA Tour Heritage tournament on CBS (2.0 million viewers).

Viewership in the top local markets was as follows:

- Louisville, KY: 5.8 rating/14 share
- West Palm Beach, FL: 5.5 rating/12 share
- Baltimore, MD: 5.4 rating/14 share
- Fort Myers, FL: 4.5 rating/9 share
- Cincinnati, OH: 4.4 rating/12 share

Host market New York City ranked eighth with a 4.0 rating/12 share.

Wagering was as follows (source: Equibase):

	2019	2020	Change
• Belmont Stakes day:	\$102.2 million	\$67.8 million	-33.7%
• Belmont Stakes race:	\$ 53.2 million	\$34.1 million	-35.9%

18.4 The Kentucky Derby

The Kentucky Derby was one of the first major sporting events to reschedule because of the pandemic. It was announced on March 13, 2020, that the race would be delayed four months, until Labor Day weekend. The original plan was to allow about 14,000 spectators, 14% of the capacity at Churchill Downs. That plan was scrapped two weeks before the race as COVID-19 cases were on the rise in Louisville.

The race portion of the 146th running of the Kentucky Derby averaged 8.3 million viewers, according to Nielsen (www.nielsen.com), a 49% drop from 2019. The 2020 broadcast on NBC had a peak audience of 9.8 million, down from 18.5 million in 2019. Viewership represented the smallest TV audience on record for the Kentucky Derby, with the previous low coming in 2000, when 9.1 million viewers watched the race on ABC. Still, it was the most-watched sporting event since Super Bowl LIV in early February 2020.

The 2020 Kentucky Derby averaged a streaming audience of 133,000, a record for horse racing events on NBC.

The annual economic impact of the Kentucky Derby has been assessed at \$217 million, virtually all of which was lost in 2020.

Wagering was as follows (source: Equibase):

	2019	2020	Change
• Kentucky Derby day:	\$250.9 million	\$126.0 million	-49.8%
• Kentucky Derby race:	\$165.5 million	\$ 79.4 million	-52.0%

18.5 Preakness Stakes

The Preakness Stakes was held October 3, 2020, rescheduled from May 16, 2020. The race generated \$52.7 million in economic activity in 2019, an impact on the Baltimore area that was lost in 2020 without spectators.

The race portion of the Preakness Stakes had 2.4 million viewers on NBC, a 56% drop from 5.4 million in 2019.

Wagering was as follows (source: Equibase):

	2019	2020	Change
• Preakness Stakes day:	\$99.9 million	\$51.2 million	-48.7%
• Preakness Stakes race:	\$62.8 million	\$31.7 million	-49.5%

OLYMPIC GAMES & U.S. TEAM TRIALS

19.1 Overview

Originally scheduled to take place July 24 through August 9, 2020, in Tokyo, Japan, The 2020 Summer Olympics, officially the Games of the XXXII Olympiad and commonly called Tokyo 2020, were postponed in March 2020 because the COVID-19 pandemic. The ceremonies leading up to the games had already begun. The traditional Olympic flame lighting ceremony in Olympia, Greece, to mark the start of the 2020 Summer Olympics torch relay, was held on March 12 without spectators. On March 23, Canada, Australia, and Great Britain announced that they would withdraw from the Games unless they were postponed for one year. On March 24, the International Olympic Committee (IOC) and Tokyo Organizing Committee announced that the 2020 Summer Olympics and Paralympics would be rescheduled to a date beyond 2020, marking the first time in the history of the modern Olympics that an Olympiad has been postponed.

“Tokyo 2020 was shaping up as one of history’s greatest sports business events, with unprecedented demand coming from fans, tourists, sponsors, and advertisers alike.”

SportsBusiness Journal, 7/27/20

The 2020 Summer Olympics were rescheduled to July 23 through August 8, 2021.

Rescheduling the Summer Olympics meant the rescheduling of the U.S. Olympic Team Trials.

19.2 Track & Field Trials

The 2020 U.S. Olympic Team Trials - Track & Field was rescheduled by USA

Track & Field (www.usatf.org) to take place June 18-27, 2021, at Hayward Field, the track and field venue at the University of Oregon. The eight days of competition spread over 10 days are projected to bring \$40 million to the local economy.

Rescheduling the Olympic trials meant moving the highly anticipated World Outdoor Championships from 2021 to 2022. That event is expected to bring approximately 2,000 athletes, 3,000 media members, and 4,000 volunteers to Eugene and the surrounding cities, and an estimated 50,000 daily visitors over the course of the 10-day meet. The economic impact is projected at \$205 million.

19.3 Gymnastics Trials

USA Gymnastics (www.usagym.org) announced that U.S. Olympic Team Trials - Gymnastics, originally scheduled for June 25-28, 2020, at Enterprise Center in St. Louis, Missouri, will be held June 24-27, 2021, at the same venue.

The St. Louis Enterprise Center estimated the economic impact of the trials to be in the \$20 million to \$30 million range.

19.4 Swimming Trials

USA Swimming (www.usaswimming.org) announced the 2021 U.S. Olympic Trials - Swimming will be held in Omaha, Nebraska, June 13-20, 2021, one week earlier in the Olympic cycle than the original dates.

The 2016 trials, held in Omaha, had a \$74 million economic impact. The impact in 2021 is projected by the Omaha Sports Commission (www.omahasports.org) at \$100 million.

COLLEGIATE SPORTS

20.1 NCAA Men's Championship Basketball Tournament

Dubbed 'March Madness,' the NCAA Division I Men's Championship Basketball Tournament ranks among the most popular American sports competitions. More than 100 million people follow the tournament each year on the Internet at work, and 57% participate in office pools.

On March 12, 2020, the National Collegiate Athletic Association (NCAA) announced that all remaining championship events for the 2019-2020 academic year would be canceled entirely, resulting in the first cancellation in the 81-year history of the NCAA basketball tournament.

The impact of the cancellation was immense. Atlanta, Georgia, the host city for the tournament final games, was expected to see \$150 million in spending related to the Final Four games. CBS asks about \$1.5 million per 30-second TV spot for the two Final Four games and the championship game. Total national TV ad spending of \$1.4 billion had been anticipated.

20.2 NCAA Football

Postponement or even cancellation of the 2020 college football season due to the COVID-19 pandemic loomed as a real possibility throughout Summer 2020.

“The pandemic has left live sports programming in constant flux, almost on a daily basis. At risk: more than 300 regular-season national college football broadcasts. The postponement of much of the college football season could disrupt the flow of more than \$1 billion from advertisers to the television networks that count on a slate of game broadcasts every fall.”

SportsBusiness Journal, 8/12/20

In 2019, college football brought in nearly \$1.7 billion in spending from television advertising, according to Kantar (www.kantar.com). Allstate, Chick-fil-A and State Farm each spent more than \$30 million to advertise during games, while AT&T spent more than \$70 million.

By September 1, 2020, all six of the conferences known as the Power Five – the Big Ten Conference, the Big 12 Conference, the Atlantic Coast Conference (ACC), the Pac-12 Conference, and the Southeastern Conference (SEC) – had committed to play. A few conferences, including the Ivy League, suspended football until 2021.

According to *SportsBusiness Journal*, more than one-half of ACC, Big 12, and SEC schools operated home games at 25% of capacity, or close to it.

20.3 Sports Programs Dropped

Several universities dropped select sports programs, citing the financial fallout from the pandemic as the reason for their decision. Sports programs dropped were as follows:

- Appalachian State University: Men's indoor track & field, men's soccer, men's tennis
- Boise State University: Baseball, women's swimming & diving
- Bowling Green State University: Baseball
- Central Michigan University: Men's indoor and outdoor track & field
- Chicago State University: Baseball
- Dartmouth College: Men's and women's golf and men's and women's swimming & diving, as well as the non-NCAA sport of men's lightweight rowing
- East Carolina University: Men's and women's swimming & diving, men's and women's tennis
- Florida Institute of Technology: Football
- Florida International University: Men's indoor track & field
- Furman University: Baseball, men's lacrosse
- Hampton University: Men's and women's golf
- Lincoln University (Missouri): Bowling
- Old Dominion University: Wrestling
- Seattle Pacific University: Women's gymnastics
- Sonoma State University: Men's and women's tennis, women's water polo
- Southern Utah University: Men's and women's tennis
- St. Edward's University: Men's and women's golf, men's and women's tennis, men's soccer; cheerleading, which had been a recognized varsity sport though not under NCAA governance, was downgraded to a club sport under the umbrella of the university's recreation department
- Stanford University: NCAA-sanctioned sports dropped - fencing, field hockey, men's volleyball, and wrestling; non-NCAA varsity sports dropped: lightweight rowing, men's rowing, coed and women's sailing, squash, and synchronized swimming
- University of Alabama in Huntsville (UAH): Men's and women's tennis
- University of Cincinnati: Men's soccer

- University of Northern Colorado: Men's and women's tennis
- University of Akron: Men's cross country, men's golf, women's tennis
- University of Connecticut: Men's cross country, women's rowing, men's swimming & diving, men's tennis
- University of Wisconsin-Green Bay: Men's and women's tennis
- University of Arkansas at Pine Bluff: Men's and women's tennis teams
- Winthrop University: Men's and women's tennis
- Wright State University: Softball, men's and women's tennis

HIGH SCHOOL SPORTS

21.1 Overview

State high school associations' sports schedules are largely determined by rules enacted by their governors and local health officials. The cancellation of spring sports seasons were mandated across the U.S. with the outbreak of the COVID-19 pandemic.

Postponements of Fall 2020 high school sports schedules varied across the U.S. States that continued with fall sports did so either without fans or with reduced capacity at stadiums.

21.2 Spring Sports

In March 2020, COVID-19 was declared a national emergency in the United States and the Centers for Disease Control and Prevention (www.cdc.gov) issued a warning against holding or attending gatherings of more than 50 people. High schools were closed across the U.S., forcing the cancellation of spring sports.

According to the National Federation of State High School Associations (NFHS, www.nfhs.org), more than 2 million student athletes were affected by the cancellation of spring sports. Approximately 600,000 boys and 490,000 girls were participating in outdoor track & field at the time the spring sports seasons were terminated; more than 485,000 boys were playing on high school baseball teams.

21.3 Football and Fall Sports

More than one million boys play high school football. As of September 2020, no state had outright cancelled the sport for the 2020-2021 academic year, but several states had postponed or modified the schedule.

California, Maryland, Nevada, North Carolina, Oregon, Virginia, and the District of Columbia postponed Fall 2020 high school sports schedules.

Thirty (30) states modified Fall 2020 high school sports schedules, as follows:

- Alaska
- Arizona
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia
- Hawaii
- Illinois
- Iowa
- Kentucky
- Louisiana

- Maine
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- New Hampshire
- New Jersey
- New Mexico
- New York
- Ohio
- Pennsylvania
- Rhode Island
- South Carolina
- Texas
- Vermont
- Washington
- West Virginia
- Wisconsin

There was no change to the Fall 2020 high school sports schedule for 14 states, as follows:

- Alabama
- Arkansas
- Idaho
- Indiana
- Kansas
- Missouri
- Montana
- Nebraska
- North Dakota
- Oklahoma
- South Dakota
- Tennessee
- Utah
- Wyoming

“The coronavirus pandemic has had an uneven impact on high school football across the United States, causing havoc in some regions while schools in other areas have made modifications and forged ahead, almost as normal.”

The New York Times, 9/9/20

Updated high school sports schedules are posted at www.nfhs.org/articles/sports-seasons-modifications-update/.

PART III: SPORTS PARTICIPATION

FITNESS & RECREATION

22.1 Overview

Most adults are well aware of the physical and mental health benefits of exercise and understand the importance of engaging in some form of regular physical activity. The pandemic, business closures, social distancing, and changes in everyday schedules disrupted exercise routine for many people.

Pandemic closures of parks, gyms, fitness studios, and other public places resulted in reduced opportunities for physical activity, particularly for people who are not able to exercise at home. Social distancing further affected people's ability to exercise, especially if outdoor physical activity was not an option due to shelter-in-place orders, crowded outdoor spaces, or unfavorable weather conditions.

“The COVID-19 pandemic means that many of us are staying at home and sitting down more than we usually do. It’s hard for a lot of us to do the sort of exercise we normally do. It’s even harder for people who don’t usually do a lot of physical exercise. But at a time like this, it’s very important for people of all ages and abilities to be as active as possible. Regular physical activity benefits both the body and mind.”

Healthy At Home
World Health Organization, 9/20

22.2 Fitness Activities At Home

Comscore (www.comscore.com) reported that fitness streamed media was up 150% year-over-year in March 2020; streaming consumption overall was up 30%.

“With millions of people staying at home during the pandemic, many are trying to stay in shape. Workout videos have become the fastest growing segments in Video on Demand (VOD) and other OTT categories.”

Comscore, 4/13/20

According to The Harris Poll (www.theharrispoll.com), 23% of adults increased their use of fitness and wellness apps during the pandemic shutdown. Those that did so were as follows:

Gender

- Female: 22%
- Male: 25%

Age

- 18-to-34: 36%
- 35-to-49: 30%
- 50-to-64: 11%
- 65 and older: 11%

Annual Income

- Less than \$50,000: 17%
- \$50,000 to \$75,000: 20%
- More than \$75,000: 28%

Family

- Parent: 24%
- No children: 22%

Region

- Northeast: 27%
- South: 22%
- Midwest: 22%
- West: 23%

All Adults: 23%

“The COVID-19 pandemic has shown there are [at-home fitness] options. Digital workout classes are exploding in popularity. People have bought so much exercise equipment that dumbbells and bicycles sold out in many places, and \$2,000-Peloton bikes are being installed in homes across America. Good, old-fashioned running is having a moment. Daily walks have become a nation’s pastime-slash-therapy.”

Time, 7/15/20

22.3 Fitness Centers

Most fitness clubs across the U.S. were mandated to close during the pandemic shutdown in March 2020. Some began to reopen in May and June 2020 but found many people were reluctant to return.

According to a survey by Morning Consult (www.morningconsult.com), 80% of adults did not feel comfortable going to a gym or fitness center in July 2020. Another survey, conducted by OnePoll (www.onepoll.us), found that 25% of U.S. adults anticipated that they would never return to a gym or fitness club.

Two fitness club chains filed for bankruptcy during the early months of the pandemic. Gold’s Gym filed for Chapter 11 bankruptcy in May 2020. 24 Hour Fitness filed for bankruptcy in June 2020.

A report from investment bank Piper Sandler (www.pipersandler.com) assessed that many of the country’s 40,000 independently owned fitness studios would not survive the pandemic.

22.4 Outdoor Recreation

The pandemic has spurred an increase in outdoor recreation participation. Sales of camping, outdoor and recreational equipment surged during the initial months of the pandemic.

“Outdoor activities pose a lower risk of spread of the COVID-19 virus than indoor activities do. You’re less likely to breathe in enough of the respiratory droplets containing the virus that causes COVID-19 to become infected. Being outside offers other benefits, too. It offers an emotional boost and can help you feel less tense, stressed, angry, or depressed.”

Safe Activities During COVID-19
Mayo Clinic, 9/20

According to the NPD Group (www.npd.com), sales of bicycles increased 63% year-over-year in June 2020. Spending on paddle sports such as kayaking, which had faced declines before the pandemic, increased 56%. There were similar gains in sales of golf equipment, camping equipment, and binoculars, as more people engaged in bird-watching.

The Professional Disc Golf Association (www.pdga.com) reported a spike in membership despite not sanctioning competitions from mid-March through May 2020.

FITNESS CLASSES & GYMS

23.1 Fitness Classes and Gyms

Surveys in April and September 2020 by The Harris Poll (www.theharrispoll.com) asked adults about how much they missed going to fitness classes or a gym during the coronavirus-related shutdown.

Responses in April 2020 were as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	17%	17%	13%	53%
• Male:	17%	23%	16%	44%
Age				
• 18-to-34:	23%	28%	22%	27%
• 35-to-49:	18%	23%	16%	43%
• 50-to-64:	13%	13%	11%	63%
• 65 and older:	14%	12%	7%	67%
Annual Income				
• Less than \$50,000:	11%	14%	15%	60%
• \$50,000 to \$75,000:	14%	19%	13%	54%
• More than \$75,000:	22%	23%	15%	40%
All Adults:	17%	20%	15%	49%

Responses in September 2020 were as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	16%	22%	18%	45%
• Male:	24%	25%	16%	36%
Age				
• 18-to-34:	24%	32%	20%	23%
• 35-to-49:	26%	25%	15%	34%
• 50-to-64:	16%	19%	17%	48%
• 65 and older:	9%	12%	13%	66%

Annual Income

• Less than \$50,000:	14%	21%	16%	49%
• \$50,000 to \$100,000:	17%	23%	17%	43%
• More than \$100,000:	28%	20%	17%	29%
All Adults:	20%	23%	17%	41%

23.2 Returning To Fitness Classes and Gyms

Responses about how soon they anticipated returning to fitness classes or a gym after the government provides information that the spread of the coronavirus flattened were as follows:

	April 2020	September 2020
• Immediately:	12%	15%
• 1-to-30 days:	19%	16%
• 2-to-3 months:	22%	14%
• 4-to-6 months:	18%	18%
• 7-to-11 months:	10%	11%
• One year or more:	10%	18%
• Never again:	9%	8%

Responses by demographic in April 2020 were as follows:

	Immediately	1-10 Days	2-3 Months	4-6 Months	7-11 Months	One Year+	Never Again
Gender							
• Female:	11%	16%	21%	21%	9%	11%	10%
• Male:	13%	21%	23%	14%	10%	10%	8%
Age							
• 18-to-34:	14%	21%	24%	18%	11%	7%	6%
• 35-to-49:	12%	22%	19%	17%	8%	1%	8%
• 50-to-64:	9%	12%	24%	18%	9%	15%	14%
• 65 and older:	12%	17%	19%	18%	9%	9%	16%
Annual Income							
• Less than \$50,000:	10%	18%	19%	17%	8%	15%	13%
• \$50,000 to \$75,000:	15%	20%	17%	20%	8%	11%	8%
• More than \$75,000:	13%	19%	24%	18%	11%	8%	8%
All Adults:	12%	19%	22%	18%	10%	10%	9%

Responses in September 2020 were as follows:

	Immediately	1-10 Days	2-3 Months	4-6 Months	7-11 Months	One Year+	Never Again
Gender							
• Female:	16%	13%	14%	17%	10%	20%	9%
• Male:	14%	19%	14%	18%	13%	16%	7%
Age							
• 18-to-34:	16%	18%	18%	16%	11%	15%	5%
• 35-to-49:	13%	20%	17%	22%	10%	12%	5%
• 50-to-64:	17%	10%	9%	12%	11%	24%	16%
• 65 and older:	11%	11%	5%	22%	15%	26%	11%
Annual Income							
• Less than \$50,000:	14%	13%	10%	19%	11%	20%	13%
• \$50,000 to \$100,000:	14%	15%	15%	17%	12%	20%	7%
• More than \$100,000:	16%	18%	16%	18%	12%	15%	5%
All Adults:	15%	16%	14%	18%	11%	18%	8%

24

GOLF

24.1 Overview

According to Golf Datatech (www.golfdatatech.com), which tracks golf rounds at 2,500 public and private courses, 44% of golf courses were open during the week of April 5, 2020, the lowest point during the pandemic. By mid-May 2020, 95% of courses had reopened and 98% had reopened by the end of that month.

The National Golf Foundation (NGF, www.ngf.org) reported that 80% of golf retail locations were open for business as of May 31, 2020. Two-thirds of pro shops were also open, although 10 states still had restrictions related to pro shops and clubhouses, including New York, New Jersey, Pennsylvania, Michigan, and Illinois.

24.2 Golf Rounds Played

The NGF reported year-over-year (YOY) changes in golf rounds played in 2020 were as follows:

- January 2020: 11%
- February 2020: 15%
- March 2020: 4%
- April 2020: -16%
- May 2020: -8%
- June 2020: -2%
- July 2020: 3%
- August 2020: 6%

“Golf is on an upswing, a trend that began last year as more Boomers retired and tried the sport, and that is continuing during the pandemic. The no-contact sport is one of only a few mostly open for business during the lockdowns.”

Advertising Age, 5/25/20

24.3 Golf Equipment Sales

March, April and May typically account for almost 40% of equipment shipments. Due to the pandemic, sales entering June 2020 were down 31% compared to 2019.

Golf equipment sales rebounded quickly as courses and golf retail stores reopened. Golf Datatech reported total sales of golf equipment on- and off-course were \$389 million in July 2020, a single month record since the company began tracking golf retail sales in 1997. Golf retail sales in August 2020 were \$331 million, up 32% over the same period in 2019.

Five equipment categories set all-time sales records for August: balls, irons, wedges, bags, and gloves. Bags were the best-performing equipment category for the month, up 55% YOY.

Even with the summer surge, which mirrored significant jumps in the number of rounds of golf nationwide, the U.S. golf retail market remained down 4.1% YOY as of August 2020.

24.4 Junior And Beginner Participation

The NGF projected that the number of junior golfers (ages 6-to-17) will increase up to 20% in 2020, with a Covid-related bump of half a million junior golfers.

Youth golf play increased among girls in 2020 and experienced the same increase in racial/ethnic diversity (approximately 25% non-Caucasian) as in recent years.

The number of overall beginning and returning golfers during Q2 2020 was about 20% higher than in recent years.

“The question, as always, is whether the industry will be able to convert these golfers into committed customers.”

golf.com, 5/27/20

24.5 Golf Travel

The NGF estimates about \$16 billion is spent a year on golf travel, 75% of which goes to the hotel, transportation, and food and beverage industries. Overall trip volume is projected to be down 35% to 40% in 2020 because of the pandemic. There were steep declines in tourism-dependent golf destinations like Hawaii (down 51%) and South Carolina (down 15%).

“While equipment sales and play have been staging a strong comeback, the same can’t be said for golf travel.”

National Golf Foundation, 9/24/20

While fewer golfers are traveling long haul to play, some are driving farther to courses. In a September 2020 survey by the NGF, 76% of golf travelers said they were willing to drive more than four hours each way for a golf getaway. Those with a trip still planned for 2020 reported they would spend an average of six to seven hours driving to their destination.

YOUTH SPORTS

25.1 Sports Participation Risks

The Centers of Disease Control and Prevention (www.cdc.gov) assesses the risks of youth sports participation as follows:

- Lowest risk: Performing skill-building drills or conditioning at home, alone or with members of the same household
- Increasing risk: Team-based practice
- More risk: Within-team competition
- Higher risk: Full competition between teams from the same local geographic area (e.g., city or county)
- Highest risk: Full competition between teams from different geographic areas (e.g., outside county or state)

The National Federation of State High School Associations (www.nfhs.org) categorized sports by risk level as follows:

- Lower risk: Most running and throwing events, individual swimming, golf, tennis, weightlifting, sideline cheer, cross country
- Moderate risk: Basketball, volleyball, baseball, softball, soccer, gymnastics, hockey, tennis, girls lacrosse, track relays, track and field jumping events
- Higher risk: Wrestling, football, boys lacrosse, competitive cheer, dance

25.2 Tournament Registrations

SportsBusiness Journal estimates the annual travel market for youth sports tournaments at \$7 billion.

“While youth sports run the gamut, from community rec programs to parent-based volunteer organizations, it is the tournament and travel end of the spectrum that has made youth sports an emerging source of commerce.”

SportsBusiness Journal, 6/29/20

Youth sports tournament play was disrupted by the pandemic. LeagueApps (www.leagueapps.com), which registers play for over 20,000 sports organizers, reported registrations indexed to the same months in 2019, as follows:

	Midwest	Northeast	South	West
• March 2020:	61	56	59	43
• April 2020:	13	18	12	17
• May 2020:	51	27	50	49
• June 2020:	81	54	67	59

Even when play resumed after the pandemic shutdown, many parents were reluctant to let their children participate. A May 2020 survey by the Aspen Institute's Project Play (www.aspenprojectplay.org) found that about one-half of parents feared their child would get sick if they returned to sports in the midst of the outbreak.

25.3 Outlook

In a May 2020 survey by MarketCast (www.marketcast.com), 52% of senior-level sports industry professionals said they do not anticipate that it will be safe for youth travel leagues to resume competition before 2021.

Sports industry professionals expect youth sports participation rates to shift after the pandemic as follows:

	Decrease	Stay Similar	Increase
• High-contact sports (e.g., basketball, football, wrestling):	56%	40%	2%
• Low-contact sports (e.g., baseball, softball, soccer):	15%	67%	17%
• Non-contact sports (e.g., tennis, golf, track & field):	6%	50%	43%

25.4 High School Sports

High school sports are assessed in Chapter 21.

25.5 Market Resources

Coronavirus Disease 2019 (COVID-19): Playing Sports, Centers of Disease Control and Prevention. (www.cdc.gov/coronavirus/2019-ncov/daily-life-coping/playing-sports.html)

APPENDIX A

COVID-19 RESOURCES

The following resources about the COVID-19 coronavirus and pandemic are relevant to sports businesses and facilities operations:

Attending Sporting Events

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/daily-life-coping/attending-sports.html

Businesses and Workplaces

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/community/organizations/businesses-employers.html

Cleaning and Disinfecting

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/community/clean-disinfect/index.html

Considerations For Youth Sports

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/community/schools-childcare/youth-sports.html

GBAC Star Facility Accreditation

- Global Biorisk Advisory Council
- <https://gbac.issa.com/issa-gbac-star-facility-accreditation/>

Guidance for Administrators in Parks and Recreational Facilities

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/community/parks-rec/park-administrators.html

Playing Sports

- Centers for Disease Control and Prevention
- www.cdc.gov/coronavirus/2019-ncov/daily-life-coping/playing-sports.html

Understanding COVID-19's Impact On The Sports Sector

- Deloitte
- www2.deloitte.com/global/en/pages/about-deloitte/articles/covid-19/understanding-covid-19-s-impact-on-the-sports-sector.html#

APPENDIX B

MARKET RESOURCES

Accenture, 161 N. Clark Street, Chicago, IL 60601. (312) 693-0161.
(www.accenture.com)

Advertiser Perceptions, 1120 Avenue of the Americas, 4th Floor, New York, NY 10036.
(212) 626-6683. (www.advertiserperceptions.com)

American Gaming Association, 1299 Pennsylvania Avenue NW, Suite 1175,
Washington, DC 20004. (202) 552-2675. (www.americangaming.org)

Centers for Disease Control and Prevention, 1600 Clifton Road NE, Atlanta, GA 30333.
(404) 639-3311. (www.cdc.gov)

Deloitte, 30 Rockefeller Plaza, New York, NY 10112. (212) 492-4000.
(www.deloitte.com)

eMarketer, 11 Times Square, New York, NY 10036. (212) 376-5291.
(www.emarketer.com)

Emsi, 409 S. Jackson Street, Moscow, ID 83843. (208) 883-3500.
(www.economicmodeling.com)

Global Biorisk Advisory Council, 3300 Dundee Road, Northbrook, IL 60062.
(800) 225-4772. (www.gbac.issa.com)

Golf Datatech, 204 South Rose Avenue, Kissimmee, FL 34741. (888) 944-4116.
(www.golfdatatech.com)

Horizon Media, 75 Varick Street, New York, NY 10013. (212) 220-5000.
(www.horizonmedia.com)

LeagueApps, 30 Irving Place, 3rd Floor, New York, NY 10003. (800) 257-3681.
(www.leagueapps.com)

Legal Sports Report, 11700 W. Charleston Boulevard, Suite 170, Las Vegas, NV
89135. (www.legassportsreport.com)

MarketCast, 5900 Wilshire Boulevard, 27th Floor, Los Angeles, CA 90036.
(323) 617-9456. (www.marketcast.com)

Monmouth University Polling Institute, 400 Cedar Avenue, West Long Branch, NJ
07764. (732) 263-5860. (www.monmouth.edu/polling-institute)

Morning Consult, 729 15th Street NW, Washington, DC 20005. (202) 506-1957.
(www.morningconsult.com)

National Golf Foundation, 501 N. Highway A1A, Jupiter, FL 33477. (561) 744-6006.
(www.ngf.org)

Navigate Research, 211 W. Wacker Drive, Suite 300 Chicago, IL 60606.
(312) 762 7474. (www.nvgt.com)

Richard K. Miller & Associates, 2413 Main Street, Suite 331, Miramar, FL 33025.
(888) 928-7562. (www.rkma.com)

SportsBusiness Journal, 120 West Morehead Street, Suite 310, Charlotte, NC 28202.
(704) 973-1400. (www.sportsbusinessjournal.com)

Statista, 55 Broad Street, 30th Floor, New York, NY 10004. (212) 433-2270.
(www.statista.com)

The Gallup Organization, 901 F Street NW, Washington, DC 20004. (202) 715-3030.
(www.gallup.com)

The Harris Poll, 1100 Wilson Boulevard, Suite 1000, Arlington, VA 22209.
(www.theharrispoll.com)

The Nielsen Company, 770 Broadway, New York, NY 10003. (646) 654-8300.
(www.nielsen.com)

Tourism Economics, 303 West Lancaster Avenue, Suite 2E, Wayne, PA 19087.
(610) 995-9600. (www.tourismeconomics.com)

U.S. Census Bureau, 4600 Silver Hill Road, Washington, DC 20233. (800) 923-8282.
(www.census.gov)

APPENDIX C

COVID-19 CASES & DEATHS BY STATE

The first diagnosis of COVID-19 infection in the United States was on January 20, 2020. From this date through October 1, 2020, the Centers for Disease Control and Prevention (www.covid.cdc.gov/covid-data-tracker/#cases) reported 7,475,262 total cases and 210,232 total deaths due to COVID-19.

By state, the total number of COVID-19 cases from January 20, 2020, through October 1, 2020, were as follows:

• California:	828,461
• Texas:	773,435
• Florida:	711,358
• New York:	468,341
• Georgia:	324,650
• Illinois:	307,750
• Arizona:	221,934
• North Carolina:	221,258
• New Jersey:	209,342
• Tennessee:	205,375
• Louisiana:	170,469
• Pennsylvania:	165,243
• Ohio:	161,299
• Alabama:	160,477
• Virginia:	153,691
• South Carolina:	152,970
• Michigan:	143,878
• Wisconsin:	143,730
• Massachusetts:	143,255
• Missouri:	134,583
• Maryland:	128,644
• Indiana:	126,946
• Minnesota:	105,740
• Mississippi:	101,678
• Oklahoma:	99,614
• Iowa:	93,563
• Washington:	90,663
• Arkansas:	88,071
• Nevada:	83,005

- Utah: 79,439
- Kentucky: 74,194
- Colorado: 74,191
- Kansas: 62,708
- Connecticut: 59,241
- Nebraska: 48,757
- Idaho: 45,082
- Oregon: 35,340
- New Mexico: 30,947
- Rhode Island: 25,596
- South Dakota: 24,876
- North Dakota: 24,857
- Delaware: 21,466
- West Virginia: 16,936
- Montana: 15,723
- District of Columbia: 15,652
- Hawaii: 13,124
- Alaska: 8,752
- New Hampshire: 8,731
- Wyoming: 6,770
- Maine: 5,604
- Vermont: 1,821

By state, the total number of COVID-19 deaths from January 20, 2020 through October 1, 2020, were as follows:

- New York: 32,950
- California: 16,177
- New Jersey: 16,147
- Texas: 16,111
- Florida: 14,767
- Massachusetts: 9,531
- Illinois: 9,085
- Pennsylvania: 8,244
- Georgia: 7,229
- Michigan: 7,161
- Arizona: 5,713
- Louisiana: 5,592
- Ohio: 4,947
- Connecticut: 4,521
- Maryland: 3,973
- Indiana: 3,711
- North Carolina: 3,670
- South Carolina: 3,471
- Virginia: 3,303

- Mississippi: 3,027
- Tennessee: 2,621
- Alabama: 2,580
- Missouri: 2,200
- Washington: 2,165
- Minnesota: 2,140
- Colorado: 2,081
- Nevada: 1,669
- Arkansas: 1,469
- Wisconsin: 1,410
- Iowa: 1,400
- Kentucky: 1,218
- Rhode Island: 1,125
- Oklahoma: 1,072
- New Mexico: 894
- Kansas: 706
- Delaware: 646
- District of Columbia: 631
- Oregon: 581
- Nebraska: 507
- Idaho: 492
- Utah: 488
- New Hampshire: 446
- West Virginia: 364
- North Dakota: 304
- South Dakota: 248
- Montana: 192
- Hawaii: 160
- Maine: 142
- Alaska: 58
- Vermont: 58
- Wyoming: 53

* Includes 248,885 cases and 23,873 deaths in New York City.

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