X Games 15
On-Site Research

September 2009

RESEARCH+ANALYTICS

Summary

METHODOLOGY

Attendee research for X Games 15 in Los Angeles, CA was conducted utilizing a "recruit and online recontact" methodology. At X Games 15, a random sample of 1226 attendees (no gender and age quotas were set) was recruited to complete a short survey on-site. Those respondents were then asked for their participation in a follow-up online survey. The recontact survey was completed by 256 of those respondents.

The following report includes data collected from this year's research only, as the change in methodology from callback to online recontact prohibits direct comparison to past years' data.

GETTING TO X GAMES 15

Repeat Visitors: Given that 2009 was the seventh year that the X Games were held in Los Angeles, it is perhaps not surprising that more than four in ten respondents were repeat visitors this year (43%).

Attendance by Groups: The majority of respondents (58%) attended in a group of 4 or more total people (including themselves).

Travel to Los Angeles: The vast majority of attendees (86%) drove to X Games 15, with roughly seven in ten respondents (71%) coming from distances of less than 60 miles.

Intention to Attend: X Games 15 seemed to be a planned activity, with nine out of ten respondents (90%) indicating that they had come specifically to see the X Games. The vast majority (80%) also indicated that they had come to see a specific sport or competitor.

Who Attended: More males (66%) than females (34%) attended X Games 15, with 65% of all attendees being younger (ages 12-24) and a median age of 19.8. Roughly one-fourth of respondents (23%) reported a household income of $75,000 or more, and roughly half (51%) of those ages 35+ were college or post-grads.

X GAMES 15 EXPERIENCE

They Had a Great Time: When asked how they would rate X Games 15, the majority (53%) gave the event the highest rating ("Excellent") and the vast majority of respondents (89%) felt that it was either "Excellent" or "Very good." The vast majority (87%) also indicated that they were likely to attend next year in Los Angeles.

A Valuable Experience: As a way of deducing the value placed on the X Games 15 experience, attendees were charged a $5-$25 admission (depending on seating) to watch the events at the Staples Center and the Home Depot Center. Roughly two-thirds of respondents (68%) felt that paying $5-$25 to watch X Games 15 events was an "Excellent" or "Good" value.

Strong Perception of X Games 15: A factor that contributed to enjoyment (and attendance) was spectators' awareness of the quality of competition and that competing in X Games 15 is important for these athletes. More than three-fourths of respondents (78%) agreed with the depiction of the Games as "The most important event for athletes who compete in summer action or extreme sports." When it came to agreeing that X Games 15 is "The best place to see the top competitors" in these types of sports, nearly nine out of ten respondents (88%) agreed.

X GAMES 15 SPONSORS

During the online interview, respondents were asked about whom they consider to be the main sponsor of the Games, with a follow-up asking for the names of additional sponsors. Respondents were also quizzed on whether or not they recognized sponsors who were not mentioned in the unaided section of the questionnaire.

Main Sponsor: Taco Bell, a longtime Summer X Games Gold sponsor, was the most frequent unaided "Main" sponsor mention (34%).

Unaided Identification: In prompting for other sponsor mentions, the total unaided awareness score was again highest for Taco Bell (80%) by a considerable margin, with the vast majority of respondents naming Taco Bell as a sponsor. This is not surprising, considering the brand was heavily involved in giving out free samples to spectators. Companies which were not considered by many to be main sponsors, but which fared better in total unaided results, included US Navy (47%), New Balance (34%), PlayStation (34%), Axe (33%) and Warner Brothers (31%). Mis-identification of Monster as a sponsor was high (39%).

Total Awareness: When aided responses were added to unaided responses, most sponsoring companies and brands were identified by one-half or more of respondents. However, newcomers Dell (48%), Ford (42%), Wrigley's (15%) and Flip Video (15%) all appeared to experience at least some measure of difficulty in achieving sponsor recognition.

Positive Association: When asked whether sponsorship of X Games 15 made them feel more favorable or less favorable towards the sponsors, or if the sponsorship had no effect, the majority (55%) felt more favorable, and a negligible percentage of respondents felt less favorable (2%). Additionally, when asked specifically how they felt toward sponsors with long-term relationships with the Summer X Games, more favorable ratings (70%) grew considerably in comparison to the same rating in general sponsorship testing. The next question concerned whether respondents had more interest or less interest in purchasing from sponsors' products, or if the sponsorship had no effect. Roughly half of respondents expressed more interest (50%), and few respondents expressed less interest (2%).

Sponsors' Image: The vast majority of respondents (82%) agreed that Summer X Games sponsors have an appealing image to younger people. Roughly three-fourths (76%) of respondents agreed that X Games 15 sponsors were providing the funding necessary for the event to take place, demonstrating that respondents understand the roles and contributions of sponsors to be more than simply advertisers. Nearly two-thirds of attendees also indicated feeling good about the company as a result of their sponsorship of the Summer X Games (63%).

X Fest: Respondents were asked if they had visited the X Fest (sponsor area where free samples and product information were distributed). The vast majority (92%) confirmed having done so. When asked whether sponsorship of the X Fest made them feel more favorable or less favorable towards the sponsors, or if the sponsorship had no effect, the majority of respondents (61%) felt more favorable and almost no respondents (1%) felt less favorable. When asked to rate the X Fest, more than two-thirds (69%) of area visitors rated it either "Excellent" or "Very good." Only 6% gave it a score of "Fair," and fewer than 1% of X Fest visitors rated it "Poor."

Our Respondents

Results from those who attended X Games 15 showed a median age of roughly 20 years old. 12-17 year old respondents were especially likely to be male, while 35+ year old respondents were more likely to be female than the total attendee sample.

2009			
	Total	**Male**	**Female**
12+	1266	837	429
Horz%		66%	34%
12-17	478	354	124
Vert %	38%	42%	29%
Horz %		74%	26%
18-24	344	243	101
Vert %	27%	29%	24%
Horz %		71%	29%
25-34	199	122	77
Vert %	16%	15%	18%
Horz %		61%	39%
35+	245	118	127
Vert %	19%	14%	30%
Horz %		48%	52%

Median = 19.8

Survey Respondents by Income

Roughly one in four respondents ages 18+ reported HH incomes of $75,000 or more (23%). Income tended to be higher among older adults, with nearly half (45%) of those 35 or older including themselves in the $75,000-plus group.

Total HH Income Before Taxes*

	Total	**Less than $40,000**	**$40,000-$74,999**	**$75,000-$99,999**	**$100,000 Plus**
18+	669	309	204	68	88
Horz%		46%	30%	10%	13%
18-34	436	262	115	30	29
Vert %	65%	85%	56%	44%	33%
Horz %		60%	26%	7%	7%
35+	233	47	89	38	59
Vert %	35%	15%	44%	56%	67%
Horz %		20%	38%	16%	25%

*Income data has been re-calculated based on those who responded.
HH Income was only asked of those ages 18+

Survey Respondents by Education

Respondent education levels were linked with age. With a median age of 20, the majority of attendees had only completed some High School or less. Similar to the higher incomes found for those 35+, roughly half (51%) were College Graduates or had completed at least some Post-Grad education.

	Total	Some HS or less	HS Grad/ Vo-Tech	Some College	College Grad/Post Grad
12+	1266	477	257	267	264
Horz%		38%	20%	21%	21%
12-34	1021	477	195	209	139
Vert %	81%	100%	76%	78%	53%
Horz %		47%	19%	20%	14%
35+	245	0	62	58	125
Vert %	19%	0%	24%	22%	47%
Horz %		0%	25%	24%	51%

Survey Respondents by Marital Status

There was a roughly even split between married (39%) and single (43%) respondents overall. Nearly three-fourths of those respondents 35 years or older (73%) indicated being married.

	Total*	Married	Living with Someone	Single	Divorced
18+	209	81	20	90	17
Horz%		39%	10%	43%	8%
18-34	130	23	18	83	5
Vert %	62%	28%	90%	92%	29%
Horz %		18%	14%	64%	4%
35+	79	58	2	7	12
Vert %	38%	72%	10%	8%	71%
Horz %		73%	3%	9%	15%

*Base: Recontact study respondents ages 18 years or older only

Survey Respondents by Occupation

Roughly two-tenths (19%) of attendees from the recontact study said they were employed in Professional/ Administrative/ Managerial jobs, with lower results for Craft/Service/Technical/Laborer jobs (14%) and employment in the Sales/Clerical fields (9%). The largest percentage (36%), not surprisingly considering the median age, were students.

	Total*	Professional/ Administrative/ Managerial	Student	Sales/Clerical	Craft/Service/ Technical/Laborer
12+	256	49	91	23	35
Horz%		19%	36%	9%	14%
12-34	177	27	91	15	10
Vert %		55%	100%	65%	29%
Horz %	69%	15%	51%	8%	6%
35+	79	22	0	8	25
Vert %		45%	0%	35%	71%
Horz %	31%	28%	0%	10%	32%

*Base: Recontact study respondents only

Survey Respondents who Have Children

Roughly half of attendees confirmed having children under the age of 18 (46%); among those respondents ages 35+, three-fourths (75%) reported having children under the age of 18.

	Total*	Have Children ages <18	DO NOT Have Children <18
18+	209	97	112
Horz%		46%	54%
18-34	130	38	92
Vert %	62%	39%	82%
Horz %		29%	71%
35+	79	59	20
Vert %	38%	61%	18%
Horz %		75%	25%

*Base: Recontact study respondents ages 18+ only

Getting to X Games 15

Given that 2009 was the seventh year that the X Games were held in Los Angeles, it is not surprising that more than four in ten respondents were repeat visitors this year (43%).

"Have you been to the Summer X Games in previous years or is this your first time?"

	2009 (%)
Been Previously	43
First Time	57

At the time of the recruitment interview, two-thirds of attendees confirmed having been at X Games 15 for at least two hours (67%).

"How long have you been here at X Games 15?"

	2009 (%)
1-2 Hours	33
2-4 Hours	24
4+ Hours	43

The majority of respondents (58%) attended the event in a group of 4 or more.

"Including yourself, how many people attended the Summer X Games with you?"

	2009 (%)
1 (by myself)	2
2	18
3	22
4	26
5	14
6+	18
AVERAGE (MEAN)	4.3

The vast majority of respondents (86%) drove to the X Games; over two-thirds of respondents (70%) traveled a distance of less than 60 miles to attend, while roughly one-fourth (26%) traveled 60 miles or more.

"Did you drive or fly to the Summer X Games?"

	2009 (%)
Drive	86
Fly	7
Both	2
Neither	4

"Approximately how far did you travel to get to the Summer X Games?"

	2009 (%)
Less than 30 miles	41
30-60 miles	29
60+ miles	26

"Which days did you attend the Summer X Games?"

	2009 (%)
Day 1 (Thursday)	28
Day 2 (Friday)	31
Day 3 (Saturday)	37
Day 4 (Sunday)	70

With the majority of the attendees within driving distance, there was not a great need to stay at a hotel. Those who stayed in a hotel (15%) stayed an average of 3.9 nights.

"Did you stay in a hotel while attending the Summer X Games?"
"How many nights did you stay in the hotel?"

	2009 (%)
Yes	15
No	86
AVERAGE # of nights*	3.9

*Base: Of those who stayed in hotel

Respondents mentioned a variety of ways that they had heard about X Games 15. The majority reported getting their information from ESPN (61%). Word of mouth (47%), Internet (43%), Local media (37%) and ESPN 2 (31%) were also among the strongest sources of awareness. Sponsor promotions (16%), National radio (12%), print ads (10%) and TV (8%) were notable sources of awareness as well.

"How did you hear about the Summer X Games?"

	2009 (%)
ESPN	61
Word of mouth	47
Internet	43
Local media (TV, radio or print)	37
ESPN 2	31
Sponsor promotion (Taco Bell, New Balance, etc.)	16
National radio	12
National print ads	10
Other national TV	8
Previously attended Summer X Games	7
My kids	5
Ticketmaster	2
School	1
Email	1
Chamber of commerce	<1
Can't recall	1

X Games 15 seemed to be a planned activity, with the vast majority of respondents (90%) indicating that they had come specifically to see the X Games. A strong majority of eight in ten respondents (80%) also indicated that they had come to see a specific sport or competitor.

"Did you come here specifically to see the Summer X Games, or would you have come here anyway?"

	2009 (%)
Specifically to see X Games	90
Would have come anyway	11

"Did you come to see any specific competitors or sports?"

	2009 (%)
Yes	80
No	20

Looking specifically at interests, respondents were more interested in a specific sport than a specific competitor. When we probed for details, nearly two-thirds of those attending to see specific sports or competitors specified both rally car (66%) and skateboarding (62%) as main draws. Moto X (50%) and BMX / bicycle stunt riding (39%) were also mentioned as important respondent focuses. Among those interested in the athletes, Travis Pastrana (54%) was the most sought out by a considerable margin. Other top athlete draws included Ken Block (21%) and Dave Mirra (20%).

"What sport or competitor did you come to see?"

	2009 (%)	
Sports Mentions (Net)	100	
Rally Car (Net)	**66**	
Rally Car Racing	*63*	
Rally Car Racing Super Special	*49*	
Skateboarding (Net)	**62**	
Street	*Men's 35*	*Women's 10*
Vert	*Men's 27*	*Women's 8*
Big Air	*29*	
Skateboarding SuperPark	*24*	
Skateboarding Legends of Vert Jam	*19*	
Skateboarding Vert Jam	*16*	
Skateboarding SuperPark Adaptive Jam	*12*	
Skateboarding Hometown Heroes Street	*11*	
Moto X (Net)	**50**	
Freestyle	*37*	
Best Trick	*31*	
Racing	*Men's 26*	*Women's 18*
SuperMoto	*26*	
Step up	*17*	
Best Whip	*17*	
Speed & Style	*15*	
Racing Adaptive	*14*	
BMX / Bicycle Stunt Riding (Net)	**39**	
Freestyle Big Air	*24*	
Freestyle Vert	*22*	
Freestyle Park/Park	*20*	
Freestyle Street	*16*	
Hood Games Experience	*6*	
Athlete Mentions (Net)	87	
Travis Pastrana	54	
Ken Block	21	
Dave Mirra	20	
Ryan Sheckler	13	
Paul Rodrigues	12	
Brian Deegan	11	
Jeremy "Twitch" Stenberg	9	
Bob Burnquist	7	
Danny Way	7	
Andy McDonald	5	
Nyjah Huston	3	
Jeremy McGrath	3	
Blake Williams	3	
Jake Brown	3	

	2009 (%)
Tony Hawk	3
Tanner Foust	3
Ricky Carmichael	3
Carey Hart	2
Kyle Lozak	2
Shaun White	2
Bucky Lasek	1
Nate Adams	1
Chris Doyle	1
Dennis McKay	1
Steve Alba	1
Van Homen	1
Chris Huston	1
All of them	3

*Base: Came to see specific competitor or sport

X Games 15 Experience

When asked how they would rate X Games 15 at the time of recruitment, nearly six out of ten respondents (57%) gave the event the highest rating ("Excellent") and more than eight in ten (86%) felt that it was either "Excellent" or "Very good." The perception of the Games was equally strong once the event was over, with nearly nine out of ten recontact respondents rating the Games either "Excellent" or "Very good" (89%).

"Overall, how would you rate the Summer X Games?"

	2009 Recruit (%)	2009 Recontact (%)
Excellent	57	53
Very Good	29	36
↑ Top Two Boxes	**86**	**89**
Good	11	9
↓ Bottom Two Boxes	**3**	**3**
Fair	3	3
Poor	0	0

The top general comments towards why respondents rated the Games "Excellent" included:

	2009 (%)
Enjoyable/Fun time	16
Good atmosphere	12
Awesome overall	11
A good family oriented environment	10
Watching the athletes/pros	10
Very exciting; a lot of action	4
Performance – skill was excellent	4
Always excellent	4
A lot of things to do	4
I am a fan of extreme sports	3
Good seating	3
Nice layout	3
Good competition	3
Free stuff	2
First time going	2
Really into the rally car event	2
Very organized	2

*Base: Rated X Games "Excellent"

The following are some of the general comments of what would make the Games better:

	2009 (%)
More food vendors; better selection	16
Free, cheaper or better parking	6
Need a schedule of events or a better schedule of events	5
More time for autographs	4
More or bigger video screens	4
Lower food prices	4
More competitions, stunts or tricks	4
Free stuff	3
Need shaded area	3
Better seating	3
Weather – too hot	2
Better layout / more space	2
Have more activities	2

Respondents were asked to rate a list of amenities provided on-site at the event. Other than the shuttle buses and the food prices, the majority of attendees were either "Extremely" or "Somewhat" satisfied with each. "Atmosphere" (93%), "View of event competition" (88%) and "Availability of seating at the Home Depot Center" (88%) received the most frequent positive ratings, with roughly nine out of ten respondents assigning each a Top 2 Box score.

Complaints about pricing in general are common, and poor reception of food prices for this event was no exception, with bottom two box scores (50%) outpacing top two box scores (27%) by a roughly 2:1 ratio.

"I am going to read you a list of amenities provided at the Summer X Games. For each one please rate on a scale of 1 to 5, 5 means you are 'extremely satisfied' and 1 means you are 'not at all satisfied.'"

	2009 (%)
Atmosphere	
Extremely/Somewhat satisfied - **Top 2 Box**	93
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	2
View of Event Competition	
Extremely/Somewhat satisfied - **Top 2 Box**	88
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	4
Availability of seating at the Home Depot Center	
Extremely/Somewhat satisfied - **Top 2 Box**	88
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	6
Availability of Bathrooms	
Extremely/Somewhat satisfied - **Top 2 Box**	83
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	5
Announcer Sound Quality	
Extremely/Somewhat satisfied - **Top 2 Box**	83
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	8
Music	
Extremely/Somewhat satisfied - **Top 2 Box**	81
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	7
Schedule of events	
Extremely/Somewhat satisfied - **Top 2 Box**	79
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	7
Directions to where events were taking place	
Extremely/Somewhat satisfied - **Top 2 Box**	77
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	10
Access to Food Concessions	
Extremely/Somewhat satisfied - **Top 2 Box**	69
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	11
Video screens to watch event competition	
Extremely/Somewhat satisfied - **Top 2 Box**	69
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	20
Availability of seating inside the Staples Center	
Extremely/Somewhat satisfied - **Top 2 Box**	68
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	10
Availability of parking	
Extremely/Somewhat satisfied - **Top 2 Box**	66
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	17
Location of parking lots	
Extremely/Somewhat satisfied - **Top 2 Box**	59
Somewhat unsatisfied /Not at all satisfied **– Bottom 2 Box**	23

	2009 (%)
Food Quality	
Extremely/Somewhat satisfied - **Top 2 Box**	53
Somewhat unsatisfied /Not at all satisfied – **Bottom 2 Box**	24
Shuttle Buses	
Extremely/Somewhat satisfied - **Top 2 Box**	39
Somewhat unsatisfied /Not at all satisfied – **Bottom 2 Box**	18
Price of Food	
Extremely/Somewhat satisfied - **Top 2 Box**	27
Somewhat unsatisfied /Not at all satisfied – **Bottom 2 Box**	50

Attendees clearly enjoyed themselves enough to encourage future attendance, with the vast majority of attendees (87%) indicating a propensity to do so. Nearly three-fourths (72%) indicated they were "Very likely" to do so, with an additional 16% being "Likely."

"When the Summer X Games are held in Los Angeles again next year, what is the likelihood that you will attend them?"

	2009 (%)
Very Likely	72
Likely	16
Likely (Net)	**87**
Not Sure	11
Unlikely	1
Very Unlikely	1

As a way of deducing the value placed on the X Games 15 experience, attendees were charged a $5-$25 admission (depending on seating) to watch the events at the Staples Center and the Home Depot Center. We asked them if they thought it was worth the value.

Roughly two-thirds of respondents (68%) felt that paying $5-$25 to watch X Games 15 events was an "Excellent" or "Good" value.

"Do you feel this is an excellent value, a good value, a fair value, or a poor value?"

	2009 (%)
Excellent	37
Good	31
↑ Top Two Boxes	**68**
↓ Bottom Two Boxes	**32**
Fair	29
Poor	4

Contributing to enjoyment (and, likely, to attendance) was spectators' recognition of the quality of competition and the importance of competing in the X Games for the athletes. Roughly eight in ten respondents (78%) agreed that the Games are "The most important event for athletes competing in summer extreme sports." When it came to agreeing that X Games 15 is "The best place to see the top competitors" in these types of sports, roughly nine out of ten (88%) agreed.

"The Summer X Games is the most important event for athletes who compete in summer action or extreme sports to take part in."

	2009 (%)
Strongly Agree	49
Agree	29
Agree (Net)	78
Neutral	17
Somewhat	2
Strongly Disagree	4

"The Summer X Games is the best place to see the top competitors in each of the summer action or extreme events."

	2009 (%)
Strongly Agree	58
Somewhat Agree	31
Agree (Net)	88
Neutral	7
Disagree	1
Strongly Disagree	4

Another set of questions concerned ESPN's motivation for staging the X Games. Attendees were given three possible reasons, and asked whether each was the "Main reason", "NOT the main reason" or "Not an important reason."

Over two-thirds of respondents felt that ESPN is involved to encourage interest in action or extreme sports (69%), six in ten strongly credited the organization's interest in getting more viewers to watch ESPN and ESPN2 (60%) and half of respondents indicated the same for promoting the names EXPN and ESPN2 (50%) .

Reasons Why ESPN Produces the X Games

	2009 (%)
To Encourage Interest in Action or Extreme Sports	
Main Reason	69
NOT the Main Reason	25
Not an Important Reason	6
To Get More Viewers to Watch ESPN & ESPN2	
Main Reason	60
NOT the Main Reason	34
Not an Important Reason	6
To Promote the Names ESPN & ESPN2	
Main Reason	50
NOT the Main Reason	43
Not an Important Reason	8

The majority of respondents indicated a better opinion of ESPN and ESPN2 after attending the X Games (55%); roughly half indicated the same improvement for their feelings toward Los Angeles (51%).

Opinion of ESPN & ESPN2 After Attending the X Games

	2009 (%)
Feel Better	55
Not As Good	1
About the Same	44

Opinion of Los Angeles After Attending the X Games

	2009 (%)
Feel Better	51
Not As Good	1
About the Same	48

X Games 15 Sponsors

Respondents were asked about whom they consider to be the main sponsor of the Games, with a follow-up asking for the names of additional sponsors. Respondents were also quizzed on whether or not they recognized sponsors who they had not mentioned in the unaided section of the questionnaire.

This research measures recall from the specific division of the sponsoring company. For example, aided and unaided recall data of PlayStation are specifically reported on as opposed to just qualifying all related answers under the brand name of Sony.

Taco Bell, a longtime Summer X Games Gold sponsor, was the most frequent unaided "Main" sponsor mention (34%). A notable portion of the sample (13%) misattributed main sponsorship to Monster.

"<u>Other than ESPN</u>, which company, product, brand or service would you say is the main sponsor of the Summer X Games?"

	2009* (%)
Taco Bell	34
Monster	13
Axe	6
US Navy	6
PlayStation	5
Rockstar	5
Subaru	4
New Balance	4
Home Depot	3
Warner Brothers	2
Red Bull	2
DC Shoes	2
Oakley	2
Lemon Heads	1
Dell	1
Ford	1
Anheuser-Busch	<1
KROQ	<1
Nike	<1
Can't recall	6

*Official Gold and Associate sponsors shaded

In prompting for other sponsor mentions, the total unaided awareness score was highest for Taco Bell, with the vast majority of respondents naming it (80%). Companies and organizations involved with the event which were not considered by many to be "Main" sponsors, but which fared better in total unaided results, included US Navy (47%), New Balance (34%), PlayStation (34%), Axe (33%) and Warner Brothers (31%). Dell (18%) and Ford (14%) were also at respectable levels.

Total Unaided Awareness ("Main" + "Others")

	2009* (%)
Taco Bell	80
US Navy	47
Lemon Heads	40
Monster	39
New Balance	34
PlayStation	34
Axe	33
War Heads	32
Warner Brothers	31
Rock Star	20
Disney	19
Dell	18
Oakley	16
Ford	14
Subaru	13
Red Bull	11
KROQ	9
NKG Spark Plugs	7
Home Depot	7
Dub City	6
DC Shoes	6
K1 Speed	4
US Army	3
Wrigley's	3
X Balm	3
NOS Energy Drink	2
Fuel TV	2
Nike	2
Finger Boards	2
Mitsubishi	1
Jeep	1
Vans	1
Gatorade	<1
Anheuser-Busch	<1
PowerADE	<1
Edge	<1

*Official Gold and Associate sponsors shaded

When aided responses were added to unaided responses, most sponsoring companies and brands were correctly identified as sponsors by the majority of respondents, though newcomers Dell (48%), Ford (42%), Wrigley's (15%) and Flip Video (15%) appeared to experience some measure of difficulty in achieving awareness among the majority of respondents.

Top awareness levels were recorded for Taco Bell (97%), PlayStation (94%) and US Navy (92%), followed by Axe (88%), Warner Brothers' "Final Destination" (84%) and New Balance (78%).

Total Awareness (Unaided + Aided)

	2008 (%)
Taco Bell	97
PlayStation	94
US Navy	92
Axe	88
Warner Brothers' "Final Destination"	84
New Balance	78
Dell	48
Ford	42
Wrigley's	15
Flip Video	15

When asked whether sponsorship of X Games 15 made them feel more favorable or less favorable towards the sponsors, or if the sponsorship had no effect, the majority of respondents (55%) felt more favorable and a negligible portion of the sample felt less favorable (2%). When asked specifically how they felt toward sponsors with long-term relationships with the Summer X Games, more favorable ratings (70%) grew considerably in comparison to the same rating in general sponsorship testing.

Favorability toward Summer X Games sponsors

	2009 (%)
More Favorable	55
Less Favorable	2
No Effect	43

Favorability toward Long-Term Summer X Games sponsors

	2009 (%)
More Favorable	70
Less Favorable	0
No Effect	30

The next question concerned whether respondents had more interest or less interest in purchasing sponsors' products, or if the sponsorship had no effect. Half of respondents indicated being more interested (50%) and few respondents felt less interested (2%).

Interest in Purchasing from Sponsors

	2009 (%)
More Interested	50
Less Interested	2
No Effect	48

The recontact study provided an opportunity to touch on image statements pertaining to sponsors. The vast majority agreed that "A sponsor of the Summer X Games has an appealing image to younger people" (82%), and roughly three-fourths of respondents agreed that X Games 15 sponsors were providing the funding necessary for the event to take place (76%), demonstrating that respondents are responding to the connection between sponsor and property and understand the roles sponsors play to be more than simply advertisers. Additionally, nearly two-thirds of attendees indicated that sponsoring X Games 15 makes them feel good about the sponsoring company (63%), and nearly six in ten indicated that Summer X Games sponsorship makes a company look more professional (58%).

Sponsorship Image Statements

% Who Strongly/Somewhat Agree

	2009 (%)
A sponsor of the Summer X Games has an appealing image to younger people	82
The sponsor is providing necessary funding for the Summer X Games to take place	76
A Summer X Games sponsor makes me feel good about the company	63
It makes a company look more professional	58
A Summer X Games sponsor is a leader in its industry	50
A Summer X Games sponsor makes me want to buy that company's product	44
It makes me want to shop at a Summer X Games sponsor's store	43

As an additional follow-up question, respondents were asked the likelihood of actually visiting a sponsor's store or Web site because of the company's involvement. Two-thirds (67%) indicated that they would be more likely to do so as a result of a company's involvement with the Summer X Games.

"How likely are you to visit a sponsor's store, Web site, etc. because of its sponsorship of the Summer X Games?"

	2009 (%)
Much More Likely	20
Somewhat More Likely	47
Likely (Net)	**67**
Neither more nor less likely	32
Somewhat Less Likely	0
Much Less Likely	1

We asked each respondent if they had visited the X Fest (sponsor area where free samples and product information were handed out). The vast majority (92%) confirmed having done so.

"Did you visit the X Fest area at the Summer X Games?"

	2009 (%)
Yes	92
No	8

When asked whether a company's presence in the X Fest area made respondents feel more or less favorable towards the sponsors, or if the sponsorship had no effect, the majority of X Fest visitors (61%) felt <u>more</u> favorable, and almost no respondents (1%) felt <u>less</u> favorable.

Favorability Toward Sponsors In X Fest

	2009 (%)
More Favorable	61
Less Favorable	1
No Effect	38

*Base: Of those who visited X Fest

When asked to rate the X Fest area, over two-thirds (69%) of area visitors gave it a score of either "Excellent" or "Very good." Only 6% gave it a score of "Fair," and almost no X Fest visitors rated it as "Poor" (less than 1%).

"Overall, how would you rate the X Fest?"

	2009 (%)
Excellent	39
Very Good	29
↑ Top Two Boxes	**69**
Good	25
↓ Bottom Two Boxes	**6**
Fair	6
Poor	<1

*Base: Of those who visited X Fest

When those respondents aware of each sponsorship were asked to rate that sponsor's "Appropriateness" for X Games 15, all sponsors were considered appropriate by the vast majority of those asked.

Appropriateness (Of those Aware)

	2008 (%)
PlayStation	99
Flip Video	95
Ford	94
Axe	94
Wrigley's	92
Taco Bell	89
Dell	85
New Balance	85
US Navy	78
Warner Brothers' "Final Destination"	64

*Base: Of those aware of each sponsorship

Watching Sports on TV

Respondents were asked about the number of hours they watch sports in an average week (respondents were screened to watch sports on TV regularly). Median viewership was 6 hours per week, and the majority of respondents (61%) indicated watching 5 hours or more per week.

"How many hours do you watch sports on TV in an average 7 day week?"

	2009 (%)
Lighter (less than 5)	39
1-2 Hours	19
3-4 Hours	20
Heavier (5 or more)	61
5-6 Hours	15
7-10 Hours	20
11+ Hours	26
MEDIAN HOURS	6

The X Games attracted people who watch extreme sports programming on ESPN/ESPN2, with more than nine out of ten indicating that they do so either "Frequently" (45%) or "Occasionally" (48%).

"How frequently do you watch extreme sports-related programs on ESPN or ESPN2?"

	2009 (%)
Frequently	45
Occasionally	48
Rarely	7
Never	1

Three-fourths of attendees (76%) confirmed having watched at least some part of X Games 15 on television.

"As you may know, all four days of the 2009 Summer X Games were televised live by ESPN, ESPN2 and ABC from July 30 through August 2. Did you get a chance to watch any of the Games on television?"

	2009 (%)
Yes	76
No	24

The vast majority (90%) indicated that watching the event live added to the enjoyment of watching it on television.

"Did watching the Games live affect your enjoyment, or did it have no effect on your enjoyment of watching?"

	2009 (%)
Added to enjoyment	90
Had no effect	7
Took away from enjoyment	3

*Base: Those who watched the Games on television

The vast majority of attendees (83%) confirmed having watched the previous year's Summer X Games, and the majority (62%) also confirmed having watched this year's Winter X Games.

"Did you watch the 2008 Summer X Games on ESPN, ESPN2 or ABC when they were on television in August of last year?"

	2009 (%)
Yes	83
No	17

"Did you watch any of the 2009 Winter X Games when they aired live on television earlier this year in January?"

	2009 (%)
Yes	62
No	38

Roughly six in ten respondents (59%) indicated that they would be "More" interested in watching action or extreme sports programs on ESPN or ESPN2 in the future.

Interest in watching action or extreme sports programs on ESPN or ESPN2 in the future

	2009 (%)
More interested	59
Less interested	2
Just as interested	40

Sports Participation & Attendance

Respondents proved to be a somewhat active group, with over one-third specifically participating in action or extreme sports.

"Which action or extreme sports do you participate in?"

	2009 (%)
Participate in Extreme Sports	36
Which Extreme sports…?	
Skateboarding	47
Motocross	32
Surfing	26
Bike Stunt Riding	22
Rally car	19
Wakeboarding	16
Snowboarding	13
Downhill BMX	12
In-line Skating	7
Speed climbing	2
Kick Boxing	1
Other	13

*Base: Those who participate in action or extreme sports

"Other than action or extreme sports, what sports do you personally participate in?"

Mentions of 2% or more	2009 (%)
Basketball	31
Baseball	25
Football	24
Soccer	21
Softball	13
Golf	7
Swimming	7
Tennis	7
Bowling	3
Fishing	3
Hiking	3
Biking	2
Auto racing	2
Hockey	2
Martial Arts	2
Raquetball	2
Running	2
Volleyball	2
Water Skiing	2
None	22

*Base: Those who participate in action or extreme sports

Over three-fourths (77%) confirmed attending other sporting events. Baseball (53%) was the top event type, followed by football (48%) and basketball (39%). Few attendees (14%) indicated attending other extreme sports competitions.

"Do you attend other sporting events or competitions?"

	2009 (%)
Yes	77
No	23

"What other types of sporting events or competitions do you attend?"

	2009 (%)	
Baseball (Net)	53	
Pro		51
College		4
High School		4
Amateur		2
Football (Net)	48	
Pro		29
College		20
High School		11
Amateur		3
Basketball (Net)	39	
Pro		33
College		8
High School		6
Amateur		1
Soccer (Net)	22	
Pro		19
High School		3
Amateur		3
College		1
Hockey (Net)	14	
Pro		14
College		1
High School		1
Extreme Sports (Net)	14	
Motocross		5
BMX		4
Supercross		3
Amateur Skateboarding		2
Pro Skateboarding		2
Snowboarding		1
Rally Car Racing		1
Off Road Racing	5	
NASCAR	5	
Softball (Net)	4	
Pro		2
High School		2
College		1

*Base: Attend other sporting events/competitions

ESPN360.com Familiarity & Visitation

Recontact survey respondents were also asked questions pertaining to ESPN360.com.

Over one-third of respondents indicated that they were either "Very" or "Somewhat" familiar with ESPN360.com (37%), and an additional 26% at least knew of the service by name.

"ESPN offers a broadband sports video network called ESPN360.com that gives you live sporting events and games. It is available through a high-speed Internet connection but only from certain Internet providers. Prior to now, how familiar were you with ESPN360.com?"

	2009 (%)
Very Familiar	11
Somewhat Familiar	27
Familiar (Net)	**37%**
Just know the name	26
Never heard of it	37

Among those familiar with ESPN360.com, the majority (56%) confirmed having ever visited it.

"Have you ever visited ESPN360.com?"

	2009 (%)
Yes	56
No	44

*Base: Those "Very" or "Somewhat" familiar with ESPN360.com

Action Sports Related Internet Usage

Recontact respondents were also interviewed on the subject of Internet usage related to action sports.

The majority of respondents (55%) indicated visiting ESPN.com for action sports highlights, news or information either frequently (20%) or occasionally (35%).

"How frequently do you visit ESPN.com for action sports highlights, news or information?"

	2009 (%)
Frequently	20
Occasionally	35
Rarely	31
Never	14

When attendees were asked to rate the importance of a number of possible action sports Web site features, the most important elements appeared to be video clips of action sports highlights (82%) and news on the action sports world (78%), followed by feature stories on the athletes (72%), full action sports events available for streaming or downloading (66%) and athlete photos (64%). The least important elements were blogs / message boards (29%), user profiles (25%) and chatting / instant messaging (15%).

"When you visit action sports Web sites, how important is having the following features at these specific Web sites? For each one I mention, please rate it on a scale of 1 to 5, where 5 means it is 'Extremely important' and 1 means it is 'Not at all important.'"

	2009* (%)
Video clips of action sports highlights	
Important - **Top 2 Box**	82
Not important **– Bottom 2 Box**	4
Latest news and information on the action sports world	
Important - **Top 2 Box**	78
Not important **– Bottom 2 Box**	8
Feature stories on athletes	
Important - **Top 2 Box**	72
Not important **– Bottom 2 Box**	9
Streaming or downloading of entire action sports events	
Important - **Top 2 Box**	66
Not important **– Bottom 2 Box**	15
Athlete photos	
Important - **Top 2 Box**	64
Not important **– Bottom 2 Box**	17
Gear and equipment reviews	
Important - **Top 2 Box**	54
Not important **– Bottom 2 Box**	22
Contests and giveaways	
Important - **Top 2 Box**	52
Not important **– Bottom 2 Box**	23
Purchase action sports merchandise	
Important - **Top 2 Box**	43
Not important **– Bottom 2 Box**	27

	2009* (%)
Being able to take part in opinion polls	
Important - **Top 2 Box**	40
Not important – **Bottom 2 Box**	37
Blogs / message boards	
Important - **Top 2 Box**	29
Not important – **Bottom 2 Box**	44
User profiles	
Important - **Top 2 Box**	25
Not important – **Bottom 2 Box**	49
Chatting / IM	
Important - **Top 2 Box**	15
Not important – **Bottom 2 Box**	61

Product & Service Usage

One of the areas that help sponsors and advertisers better target attendees and their purchasing habits is the product usage section. Results for product categories are compared to the norms collected from the ESPN Sports Poll where available.

The largest percentage of attendees indicated owning Nike (56%) athletic shoes, followed by Vans (35%), New Balance (25%), DC Shoes (25%) and adidas (22%). New Balance, an official X Games 15 Gold sponsor, had a higher penetration of users among attendees compared to the national population.

"What brands of athletic shoes do you own?" (more than one answer is acceptable)

Mentions of 3% or More	2009 (%)	Norm* (%)
Nike	56	44
Vans	35	1
New Balance	26	18
DC Shoes	25	1
adidas	22	12
Converse	15	3
Puma	9	3
Etnies	8	<1
Asics	7	3
Jordans	6	-
DVS	4	-
Reebok	4	15
Sketchers	3	4

*Source: ESPN Sports Poll: online survey 2008

Taco Bell (24%) proved to be attendees' fast food restaurant of choice, by a considerable margin over overall national favorite McDonald's (16%).

"What fast food restaurants do you visit most often?"

Mentions of 2% or More	2009 (%)	Norm* (%)
Taco Bell	24	6
McDonald's	16	26
In-N-Out	15	1
Jack in the Box	7	2
Carl's Jr.	6	1
Wendy's	5	7
Del Taco	5	<1
Subway	4	4
Burger King	2	6
Bakers	2	-

*Source: ESPN Sports Poll: 2009 (Q1-Q2)

Coca-Cola was the most frequently mentioned brand when respondents were asked to name their favorite soft drink brand (27%); other frequent mentions included Dr. Pepper (16%) and Pepsi (15%).

"What is your favorite brand of soft drink?"

Mentions of 2% or More	2009 (%)	Norm* (%)
Coca-Cola	27	16
Dr. Pepper	16	7
Pepsi	15	12
Mountain Dew	6	5
Sprite	6	4
Diet Coke	4	9
Root Beer (unspecific)	3	-
Lipton Iced Tea	2	<1
A&W Root Beer	2	1

*Source: ESPN Sports Poll: 2009 (Q1-Q2)

Respondents reported a Visa as their most often-used credit card; more than twice as frequently as MasterCard.

"Which credit card do you use most often?"
Base: Ages 18+

	2009 (%)
Visa	51
MasterCard	20
American Express	7
Chase	2
Capital One	1
CitiBank	1
Discover	1
None	17

The vast majority of respondents (90%) confirmed owning a video game console, with Sony system ownership highest at 35%. Microsoft XBOX and Nintendo Wii were owned by about one-quarter of respondents.

"Which video game consoles, if any, do you currently own?"

	2009 (%)
Sony PlayStation (1, 2 or 3)	35
Microsoft XBOX or XBOX 360	27
Nintendo Wii	25
None	10

The Madden series (21%) was the video game receiving the strongest interest, followed by the Call of Duty (16%), Tony Hawk (14%), Skate (12%) and Guitar Hero (11%) franchises.

"What are some of your favorite home entertainment video games?"

Mentions of 3% or More	2009 (%)
Madden (Net)	21
Call of Duty (Net)	16
Tony Hawk (Net)	14
Skate (Net)	12
Guitar Hero (Net)	11
Halo (Net)	9
NBA 2K9	8
Rock Band (Net)	7
FIFA 2009	7
Gears of War (Net)	6
MLB 2K9	6
Need for Speed (Net)	6
Wii Sports	5
Grand Theft Auto (Net)	5
MX vs. ATV Unleashed	5
Wii Fit	4
Grand Turismo (Net)	4
Mario Kart (Net)	4
X Games (Net)	3
Super Mario Brothers (Net)	3
Street Fighter (Net)	3
Tiger Woods (Net)	3

AT&T (30%) and Verizon (20%) were the most frequently cited long distance services.

"Which long distance telephone service do you use most often?"
Base: Ages 18+

	2009 (%)
AT&T	30
Verizon	20
T-Mobile	7
Sprint	6
Cox	3
MCI	2
Boost Mobile	1
Vonage	1
Cingular	1
None	30

Summer X Games attendees were more likely to use mobile phones than the general population. Verizon Wireless (36%) ranked as the #1 mobile service among attendees, followed closely by AT&T/Cingular (32%).

"Which cellular or mobile services, if any, do you use?"

	2009 (%)	Norm* (%)
Verizon Wireless	36	24
AT&T/Cingular [NET]	32	21
T-Mobile	16	6
Sprint	12	7
Metro PC	4	1
Nextel	2	1
Boost Mobile	2	<1
Virgin Mobile	1	1
Alltel	<1	4
Don't know / Can't recall	3	20

*Source: ESPN Sports Poll: 2009 (Q1-Q2)

Attendees were also asked about their ownership of various consumer electronic products. Attendees appear to be quite tech savvy, as 9 of the 13 items were owned by the majority of attendees. The vast majority of attendees have a DVD player (99%), high-speed Internet access (93%), a CD player (86%), a digital camera (85%) and an MP3 player (81%), and roughly two-thirds own a cellular or mobile phone with access to the Internet (69%) and a high definition TV (65%).

"For each of the following consumer electronics products, please tell me whether you currently own it, do not own it but plan to purchase in the next 12 months, or do not own and have no plans to purchase within the next year?"

	2009 (%)
DVD player	96
High-speed Internet access	93
CD player	86
Digital camera	85
MP3 player	81
Cell phone w/Internet access	69
HDTV	65
Handheld device to download & play video (i.e., Video iPod)	57
DVR	53
Portable media player (i.e., PSP)	43
Cell phone w/o Internet access	31
PDA	27
Satellite Radio	25

Two in ten attendees plan to purchase a High Definition TV (20%) in the next 12 months. Additionally, more than one in ten respondents reported intending to purchase a DVR (16%), a handheld device to download and play video (15%), a satellite radio (14%), a cellular or mobile phone with access to the Internet (12%) and a portable media player (12%) in the next 12 months.

Plan to purchase in the next 12 months

	2009 (%)
HDTV	20
DVR	16
Handheld device to download & play video (i.e., Video iPod)	15
Satellite Radio	14
Cell phone w/ Internet access	12
Portable media player (i.e., PSP)	12
PDA	6
Digital camera	6
MP3 player	4
Cell phone w/o Internet access	3
High-speed Internet access	2
DVD player	1
CD player	<1

Among those attendees with a cellular/mobile phone or a PDA, roughly one-fourth indicated using such a device to access or download sports information, news or highlights on a daily basis (26%). Additionally, roughly two in ten indicated doing to either weekly (16%) or monthly (5%).

"How often do use your cellular or mobile phone to access or download sports information, news or highlights?"

	2009 (%)
Daily	26
Weekly	16
Monthly	5
Rarely	22
Never	31

*Base: Those who have a cellular or mobile phone or a PDA

When asked about social networking site activity, roughly seven in ten respondents indicated ever visiting Facebook (71%), with the majority of those visiting at all doing so daily. Roughly six in ten ever visit MySpace (61%) and three in ten ever visit Twitter (30%). MySpace and Twitter usage among those visiting at all was lower than Facebook usage, with only an approximate one in three of those visiting each doing so on a daily basis (23% and 11%, respectively).

"How often do visit each of the following social networking sites?"

	2009 (%)
Facebook	71
Daily	43
Weekly	14
Monthly	6
Rarely	8
Never	29
MySpace	61
Daily	23
Weekly	16
Monthly	9
Rarely	13
Never	39
Twitter	30
Daily	11
Weekly	3
Monthly	4
Rarely	11
Never	70

High-speed connections via DSL (42%) and Cable Modem (35%) were the most common Internet connection speeds.

"With what speed do you usually connect to the Internet?"

	2009 (%)
High-speed access via DSL	42
High-speed access via Cable Modem	35
T1 or faster	10
56.6k or slower	<1
Other	5
None	7