



Lots of Chargers Fans, but Only Mild Support for Team's Proposal; Most Don't Think Qualcomm Needs to Go

Analysis by John E. Nienstedt, President

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After the home team's brilliant season on the gridiron, almost two thirds of County residents call themselves Chargers fans. That's a little more than the 62% registered in late 2004, so the Chargers are pointed in the right direction in terms of fan base despite friction with the city of San Diego. However, they may be fumbling when it comes to their search for a new home. The question was worded differently in 2004 but the results then showed only 41% disapproving of a Chargers' plan to replace Qualcomm stadium and build a new Super-Bowl quality stadium on that site. Now – as the team discusses where to move within the County -- that percentage is up to 49%. A big part of the problem for the Chargers is that people remain attached to the current stadium. Only 29% say Qualcomm stadium needs to be replaced. Further, when asked where a new stadium should be located the most frequent response is to put it at the existing site in Mission Valley. Oceanside is the leader among the three alternatives, but, making the situation more complex, a south county site (either Chula Vista or National City) is more popular than Oceanside. In what may be the most interesting finding, the SDIPR/Competitive Edge Barometer shows that a huge majority believe professional sports teams in San Diego contribute a moderate or great amount to the City's quality of life. A mere 10% say pro sports add nothing when it comes to enhancing local quality of life.

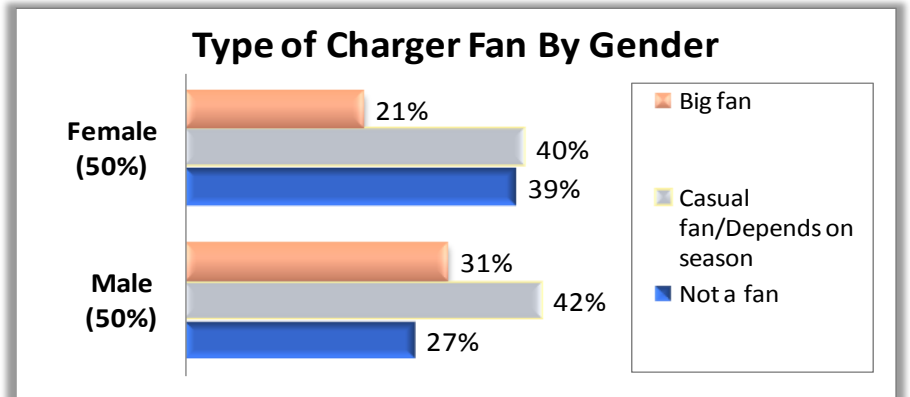
Chargers Fans Climbing on the Bandwagon

The gain in Chargers fans comes only among casual fans. In 2004, 35% of residents rated themselves casual fans and now that figure is 40%. Bear in mind that the 2004 survey was conducted during a play-off run and the current survey was fielded a month and a half after a galling play-off defeat, so, if anything, the current numbers understate the team's fanbase.

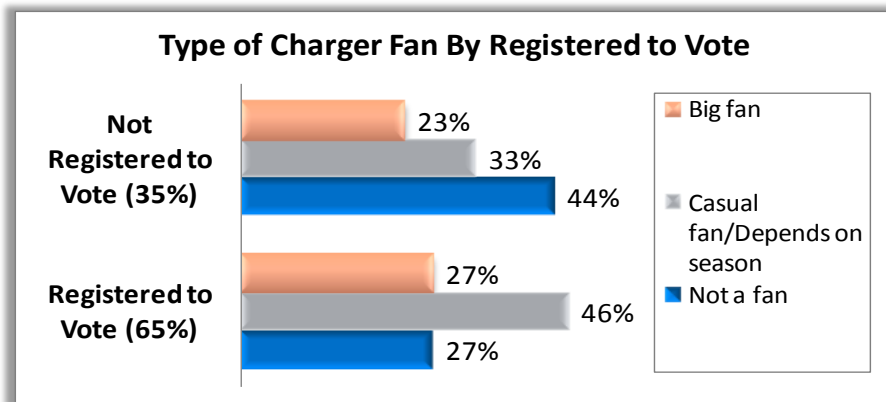
Delving into the demographics of Charger fandom is interesting.

The gender gap is there, though perhaps not as wide as some might expect. Sixty-one percent of females say they are fans while 73% of males claim they are. In what has implications for the

stadium search, while we found no evidence that fans tend to congregate in one region or another, the data show that Hispanics are less likely to be Charger fans. Though 59% of Hispanics say they are fans, 70% of non-Hispanics are fans.



We find a lot of intriguing evidence that being a fan and civic engagement go hand-in-hand. We found in the 2004 study that being a fan tended to mean you were more neighborly. In this survey we find voters are more likely to be Charger fans.



This is particularly counter-intuitive because 18 to 24 year-olds – notoriously less likely to register and vote than older citizens – constitute some of the Chargers' most rabid fans as 31% profess to be big fans. Long time residents are also more likely to be Chargers fans, indicating that becoming a fan is part of the bonding process. While nearly three-quarters of those who have lived in the County more than two decades are fans, only about 56% who have been in the county less than six years put themselves in the same category.

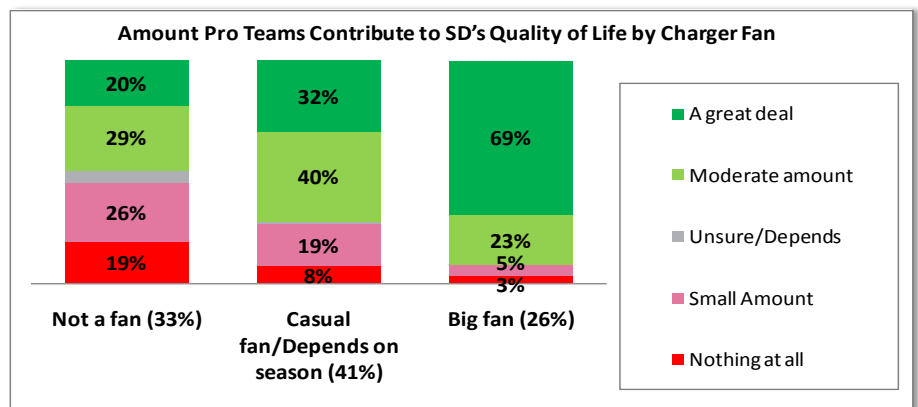
It is interesting how income relates to fandom. The results clearly show that poor people are much less likely to be Chargers fans while it's difficult to find someone earning more than \$150,000 who is *not* a fan. Only 18% in the top earning category say they are not fans, but, on the other end of the scale, half those earning less than \$20,000 are non-fans. On average, those in the \$20,000 to \$40,000 category are also less likely to be big fans, indicating that the Chargers may be pricing themselves out of what amounts to over one-third of the market.

Finally, the results show that education levels are inversely related to being a Chargers fan. That is, those with only a high school education or less are more likely to be fans than those with advanced degrees.

Pro Sports Make San Diego Better

A staggering 87% of County residents believe that having professional sports teams in San Diego boosts the city's quality of life and 37% think the teams contribute a "great deal." Based on these results (unless the County of San Diego is an anomaly) it is no wonder that pro sports teams are highly sought after by locales. In fact, even within San Diego County, we find that significantly more folks than average in the north inland suburbs (from Poway up Interstate 15 to Fallbrook) think the City of San Diego benefits from the Padres and Chargers. So, there appears to be something of a "grass-is-greener" effect at work.

But could this all be due to the large fan base the Chargers have created? After all, non-fans do not believe pro sports teams are that beneficial, right? Well, they certainly are not as convinced as big fans or even casual fans, but even three-quarters of non-fans

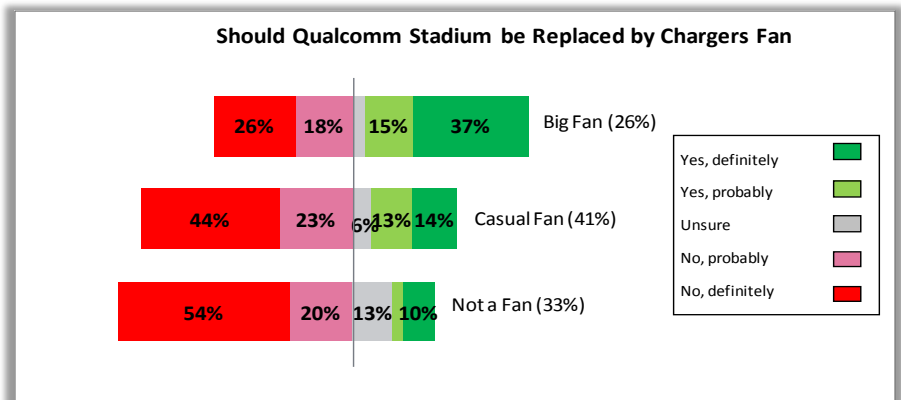


concede that pro sports teams add something to quality of life and nearly half say it's more than a small amount.

We do find that sentiment drops off among more educated and longer term residents, but this ebbing is not dramatic. In one of the more tantalizing findings, the results show that approval of the job the Mayor and Governor are doing is strongly related to beliefs about how much pro sports teams contribute to quality of life. Those who approve of both elected officials tend to be convinced that pro sports teams are serious quality of life engines. On the other hand, those who do not think either is doing a good job heavily discount the effect.

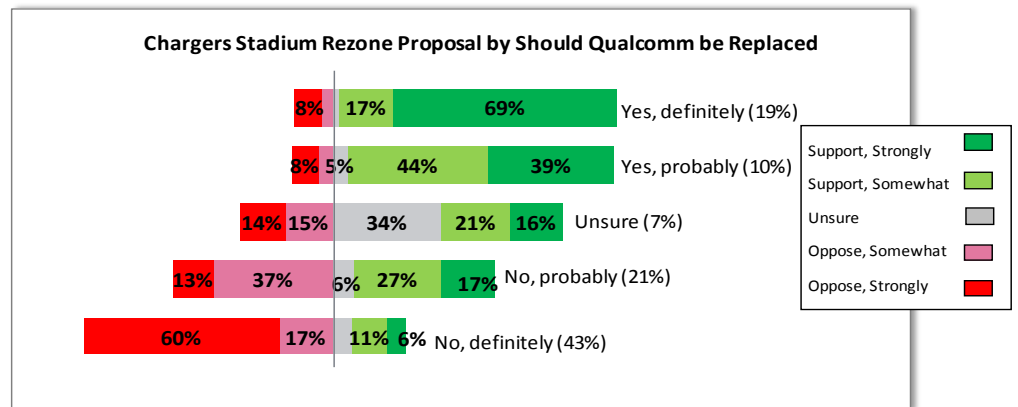
Keep Qualcomm

A basic question in the debate over where the Chargers should plant themselves for the next 30 years is whether they need to move at all. The results dramatically show that residents are not convinced that Qualcomm has outlived its usefulness. Overall 63% say “no,” that the current stadium does not need to be replaced and 43% are definite about that. Though big Chargers fans tend to buy that argument, the results among them are not overwhelming. While 52% of them say Qualcomm stadium needs to be replaced, a still sizeable 44% disagree with that sentiment, and the casual Charger fan is far more hostile to the idea that Qualcomm stadium needs replacing.

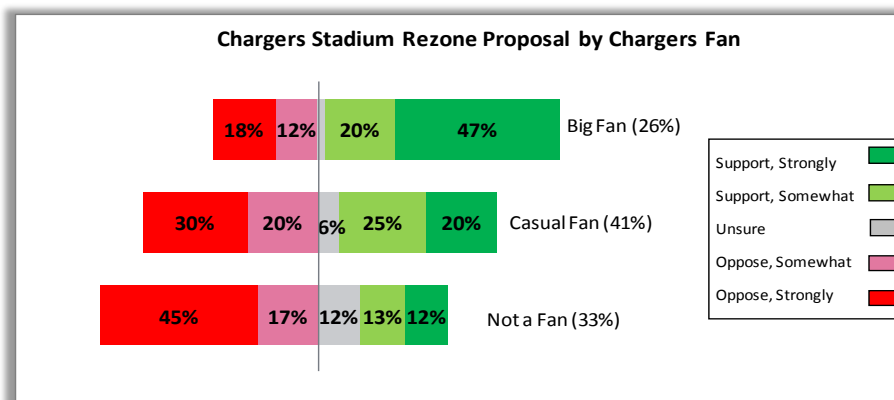


Chargers' Plan Draws Skepticism

The belief that Qualcomm does not need to be replaced generates much of the skepticism regarding the Chargers' plans for a new stadium and how to pay for it. Though a robust 69% of those who definitely believe Qualcomm should be replaced also strongly support the Chargers' plan, 60% who definitely believe in keeping Qualcomm are firmly opposed to the Chargers' proposal. Since, as we have seen, there are far more folks who think Qualcomm stadium is still useful than think it needs to be replaced, this creates a climate where, 5% more residents oppose the Chargers' plan than support it.



While supporters of the Chargers' plan need to win the argument about Qualcomm stadium, it's clear from the results that their target for that message ought to be casual fans. Big fans are solidly in the Chargers' camp when it comes to rezoning land to fund the new stadium. In contrast, non-fans pretty much oppose the Chargers' plan. In the middle are casual fans among whom only 30% strongly oppose the plan.



We find that newer residents – those living in the County less than five years – are significantly more inclined to support the Chargers’ plan, than long time residents. Though there is no way of being certain from the data, the greater opposition from longtime residents could stem from a sense of “been there-done that” with the building of Petco Park in San Diego’s East Village neighborhood. Longtime residents might also be more apt to retain a bitter taste in their mouths related to the City’s “ticket guarantee” or recall claims in 1997 that the stadium’s expansion and renovation was all it needed to be put on the Super Bowl circuit.

Geographically, we find that residents in that north suburban corridor support the Chargers’ plans much more than those in other parts of the County.

Where Should the New Stadium Go? Maybe Nowhere

The Chargers are discussing their options with three potential suitor cities in the County. The door to building the new stadium over the ashes of Qualcomm Stadium is supposedly shut; a victim of personalities, pensions and politics within the City of San Diego. In view of the situation it is surprising to see that more than any other particular spot, residents prefer the current site in Mission Valley for the new stadium. Including folks who think any of the locations are fine, 44% want the stadium where it is. Where a resident actually lives is one obvious key here as 48% in the north San Diego city region and 62% in the east suburbs (La Mesa, El Cajon, Santee, etc) prefer building at the current site more so than residents in other areas.

Residents in the north suburbs again prove that they are hungry for football. Forty-eight percent there want the stadium in Oceanside. However, only 32% in the north coastal area, which actually contains the City of Oceanside, prefer locating the stadium in that City. Since more (44%) want the Chargers to build on the existing site, this implies that north coastal residents are not too excited by the prospect of a Super Bowl quality stadium in their neck of the woods.

Chula Vista is the favored location for 17% of County residents. Among residents of the southern suburbs, 34% favor the Chula Vista location, which is *still* shy of the 38% there who want the

stadium to stay in Mission Valley. National City registers only 9% among those same residents and a paltry 7% among all County adults. When the two South Bay cities are combined, however, 26% of the residents support one of those two locations and 46% of south suburban residents prefer Chula Vista or National City.

But raw geography is not the only factor here. Ethnicity, interestingly, is also important as Hispanics prefer a southern location to Mission Valley. If the Chargers are intent on reaching out to what has been a smaller segment of their fan base, moving the stadium to the South Bay would make sense. Whites and Asian-Americans would prefer building on the current site.