

Travel Activities & Motivation Survey

**Interest In
Professional Sports
(As a Spectator)
Profile Report**

Travel Activities & Motivation Survey

Prepared By:

Lang Research Inc.

...on behalf of...

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

Interest in Professional Sports

- Key Findings -

49.1 % of the American travelers and 37.2 % of the Canadian travelers have at least a moderate interest Professional Sports (i.e., attending professional sporting events at least occasionally while not traveling or attending two or more types of professional sporting events while traveling in last two years). Americans were 100 % more likely than Canadians to be classified as Professional Sports Enthusiasts (i.e., attending professional sporting events frequently while not traveling and attending two or more types of professional sporting events while traveling in last two years or attending professional sports occasionally while not traveling and attending three or more types of professional sporting events while traveling in last two years).

Male travelers were 82 % (in Canada) and 77 % (in the United States) more likely to be Professional Sports Enthusiasts than female travelers. In both countries, the level of interest in professional sports is highest among those under 35 years old who are single and declines as the age of the respondent increases. Attendance at professional sports events is higher among those with university or college educations and tends to increase as household income increases. As such, the prime target market for professional sporting events is younger affluent males.

In Canada, the likelihood that a trip will be taken domestically over the next 2 years increases from 74 % among those with low interest in professional sports to 90 % among those considered Professional Sports Enthusiasts. In the United States, the likelihood that a trip will be taken to Canada over the next 2 years increases from 36 % among those with low interest in professional sports to 51 % among those considered Professional Sports Enthusiasts.

Professional Sports Enthusiasts were more likely to have sought out vacation experiences associated with personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life). They were also more likely to have pursued sports and learning vacation experiences (e.g., to participate in a hobby or sport) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote professional sports-related tourism should emphasize the opportunities for entertainment, personal indulgence and relaxation offered by the destination.

Interest in Professional Sports

- Key Findings (Continued) -

Those who attend professional sporting events were more likely to be active in outdoor activities while traveling. This is especially apparent among Professional Sports Enthusiasts, who tend to be younger and more affluent and hence more active in outdoor activities while traveling. Professional Sports Enthusiasts were especially likely to be interested in participating in team sports (e.g., baseball, hockey, basketball, volley ball), golfing and fitness. Providing opportunities to participate in such activities as part of professional sports tourism packages may be especially effective, particularly for younger affluent males.

Professional Sports Enthusiasts were more likely to have visited a casino or gone to a horse race suggesting that gambling appeals to this sector of the market. Combining professional sports with opportunities to gamble may be particularly appealing to the Professional Sports Enthusiasts.

Professional Sports Enthusiasts were more likely to rely on the advice of family and friends when planning their vacations than others. They also consulted a larger variety of information sources and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising and television programming advertising.

In terms of interest in new tourism products, Professional Sports Enthusiasts were more interested in Great Lakes cruises, movie and children-orientated theme parks, cultural/jazz/film festivals and musical attractions such as the Rock 'n Roll museum. Professional Sports Enthusiasts are interested in many different tourism attractions and may be responsive to tourism packages which combine a professional sports event with passes to several other attractions in the region.

As would be expected, Professional Sports Enthusiasts, and to a certain extent, those with a moderate interest in professional sporting events are much more likely to watch professional sports on television and read sports magazines. As such, these may be the most efficient media channels by which to reach this audience. Professional Sports Enthusiast are also more likely to read the travel section of their daily newspaper, travel magazines, news magazines and general interest magazines and to watch news programming on television.

The impressions of American travelers of Canada and Ontario are progressively more positive as the level of interest in professional sports increases. This may be due to exposure to Canada through television sports programming, which often provides information about the location in which the sporting events takes place.

Background

An association of Canadian Tourism Ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had traveled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in professional sporting events as a spectator (e.g., baseball, basketball, figure skating, football, golf, ice hockey) while not traveling and while traveling. The database was used to identify sectors of the market that exhibit a moderate interest and high interest in professional sporting events. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario relative to the interest shown in professional sports. This report also provides an overall market potential of each segment of the market to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's and Ontario's professional sports activities.

Professional Sports Interest Index

Construction of the Index

The TAMS Mailback survey contained seven items specifically associated with attending professional sports events that were used to construct an overall Professional Sports Interest index. These were:

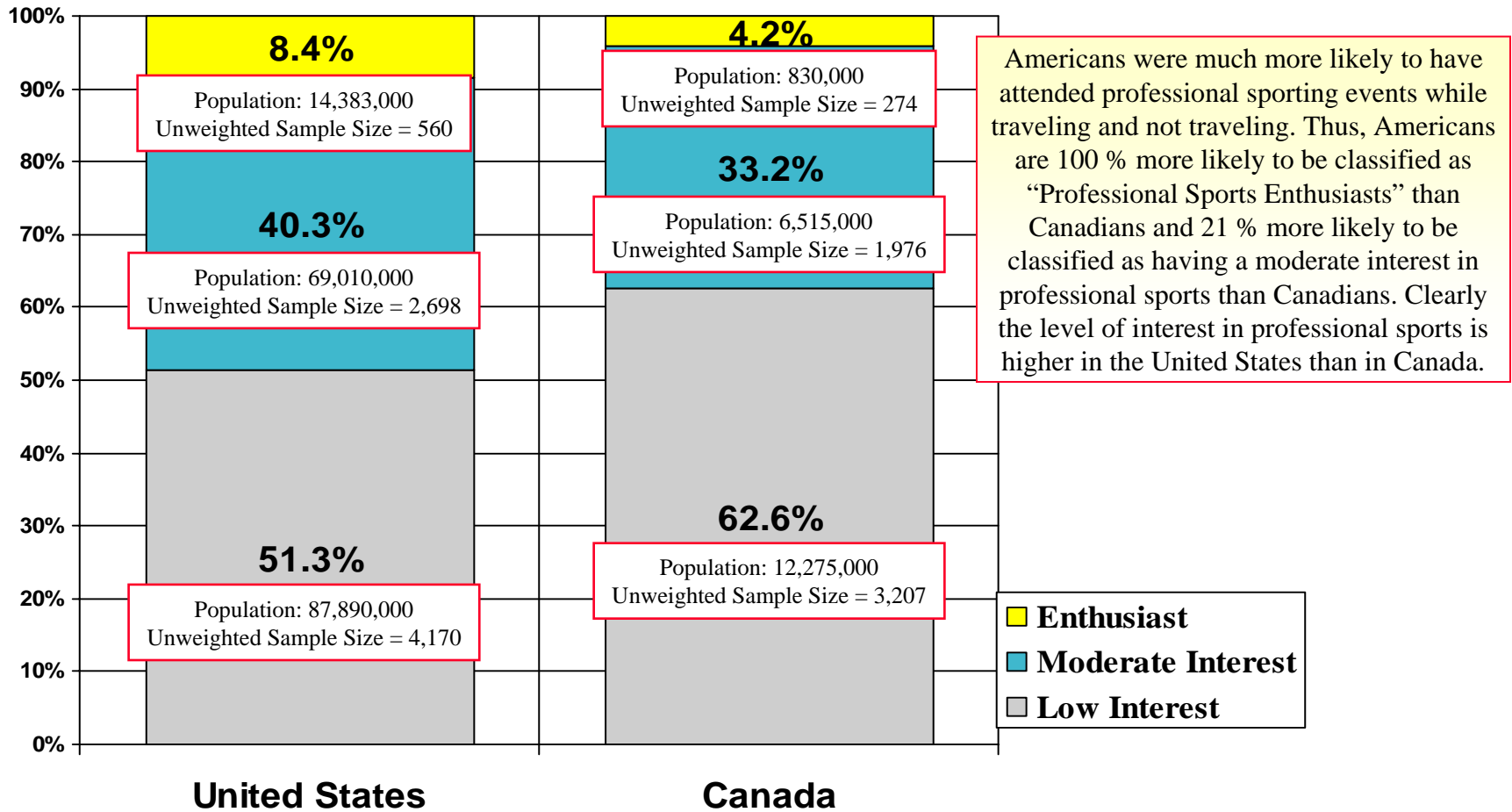
- Whether the respondent attended professional sporting events while not traveling “frequently”, “occasionally”, “rarely” or “not at all”.
- Whether the respondent had attended any of the following types of professional sporting events while traveling in the past 2 years: professional baseball games, professional basketball games, professional football games, professional ice hockey games, professional golf tournaments and professional figure skating events.

The responses to the first of these items (i.e., the extent to which professional sporting events were attended while not traveling) was converted into a four point scale where “Not at all” was set to “0”, “Rarely” was set to “1”, “Occasionally” was set to “2” and “Frequently” was set to “3”. The six types of professional sports events attended while traveling were converted into binary variables where “0” was “Did not attend any pro sports events of this type” and “1” was “Did Attend a pro sports event of this type in the last two years”. The seven items were summed to produce an overall score ranging from “0” to “9”. This score was reduced to three levels as follows: A score of “0 or 1” was set to “Low Interest”, a score between “2” and “4” was set to “Moderate Interest” and a score between “5” and “9” was set to “Enthusiast”.

Note, this scoring scheme meant that in order to qualify as a Professional Sports “Enthusiast”, it was necessary for those who “frequently attend sporting events while not traveling” to have attended at least two types of sporting events while on a trip during the past two years, those who “occasionally attend sporting events while not traveling” were required to have attended at least three types of sporting events while on a trip during the past two years and those who rarely or never attend sporting events while not traveling were required to have attended 4 or more sporting types of sporting events within the last 2 years. Those with moderate interest were required to have attended professional sporting events at least occasionally while not traveling or to have attended at least two types of professional sporting events while traveling during the past two years. All others were considered to have “Low interest” in professional sporting events.

Interest in Professional Sports Canada versus United States

Based on Attendance At Professional Sporting Events While Traveling and Not Traveling
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



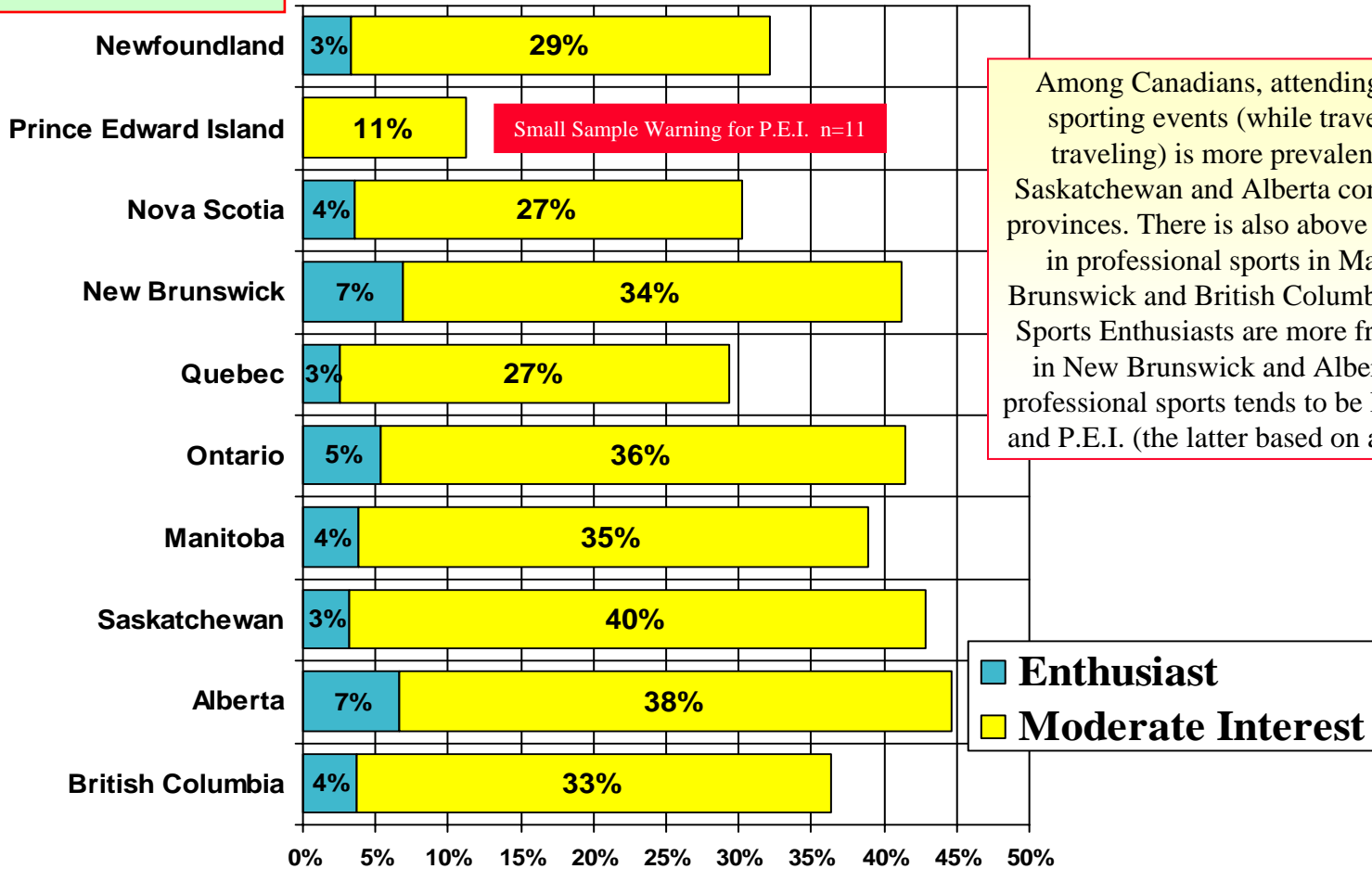
Americans were much more likely to have attended professional sporting events while traveling and not traveling. Thus, Americans are 100 % more likely to be classified as “Professional Sports Enthusiasts” than Canadians and 21 % more likely to be classified as having a moderate interest in professional sports than Canadians. Clearly the level of interest in professional sports is higher in the United States than in Canada.

Interest in Professional Sports Based on Attendance At Professional Sporting Events

Canada:By Province

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

Province of Residence

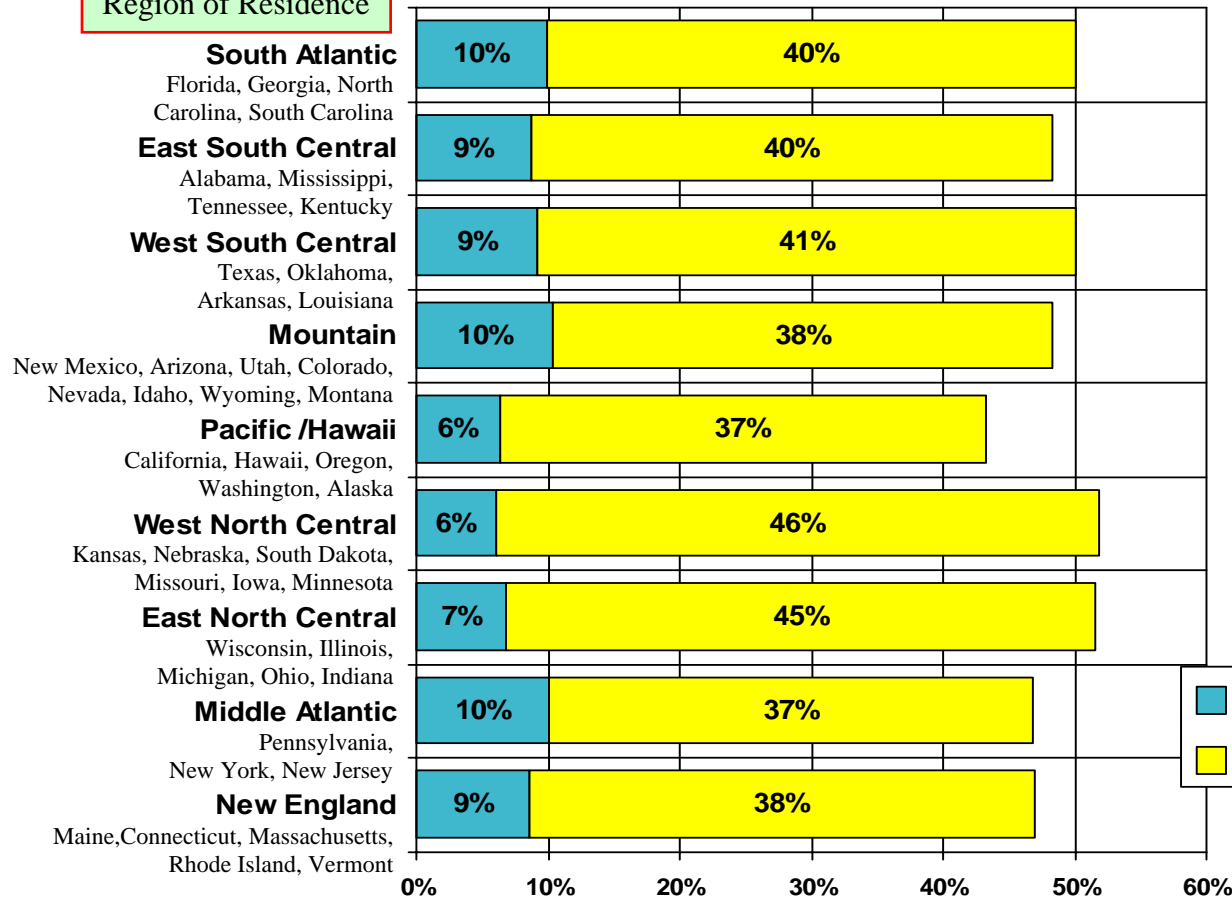


Among Canadians, attending professional sporting events (while traveling and not traveling) is more prevalent in Ontario, Saskatchewan and Alberta compared to other provinces. There is also above average interest in professional sports in Manitoba, New Brunswick and British Columbia. Professional Sports Enthusiasts are more frequently found in New Brunswick and Alberta. Interest in professional sports tends to be lower in Quebec and P.E.I. (the latter based on a small sample).

Interest in Professional Sports Based on Attendance At Professional Sporting Events United States:By Region

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

Region of Residence



The level of interest manifested in professional sporting events is relatively uniform across the regions of the United States. However, the incidence of Professional Sports Enthusiasts is somewhat lower in the Pacific/Hawaii Region of the U.S.

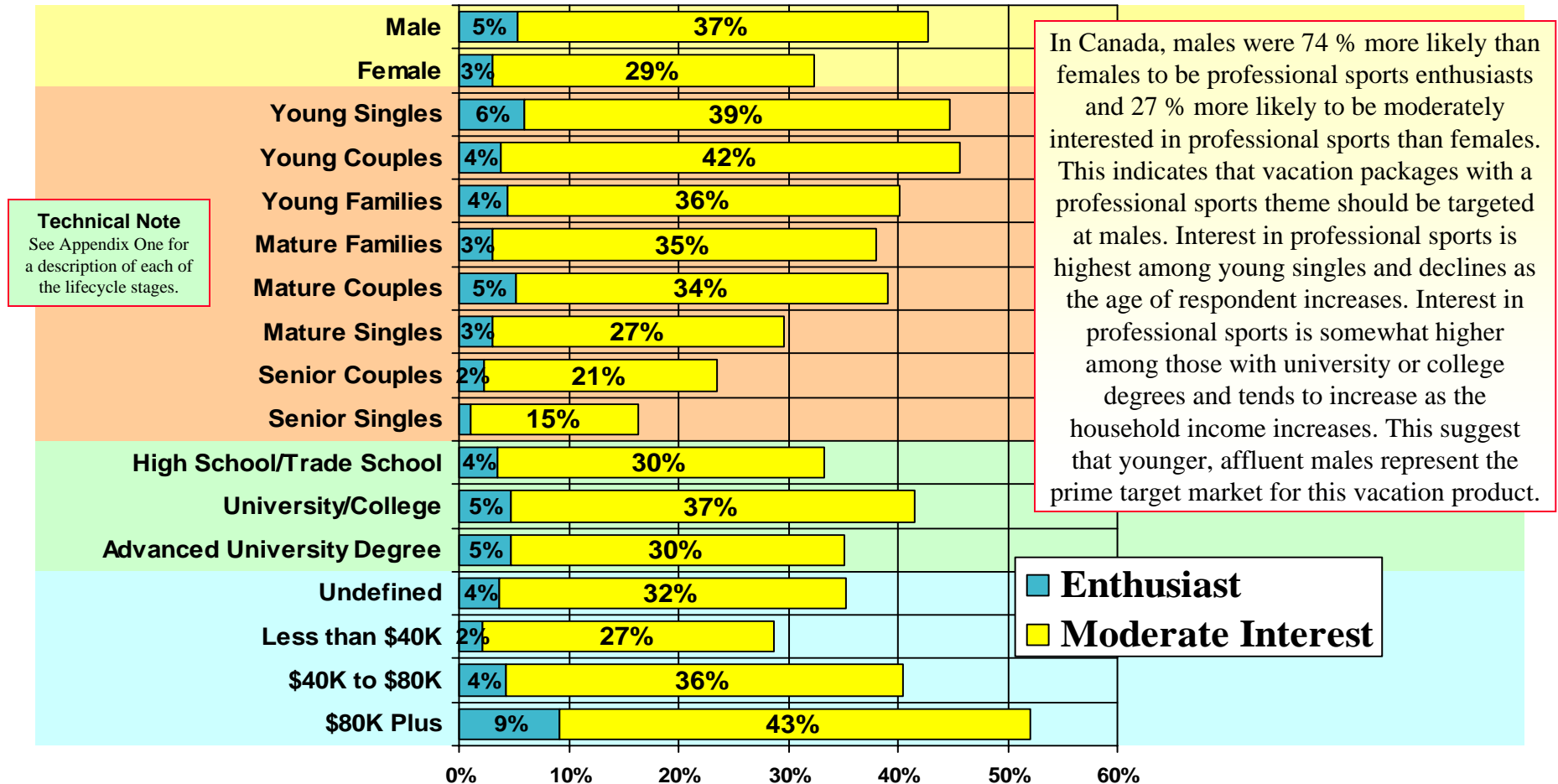
■ Enthusiast
■ Moderate Interest

Interest in Professional Sports Based on Attendance At Professional Sporting Events

Canada:By Demographics

Based on Day-to-Day and Past Vacation Activity

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

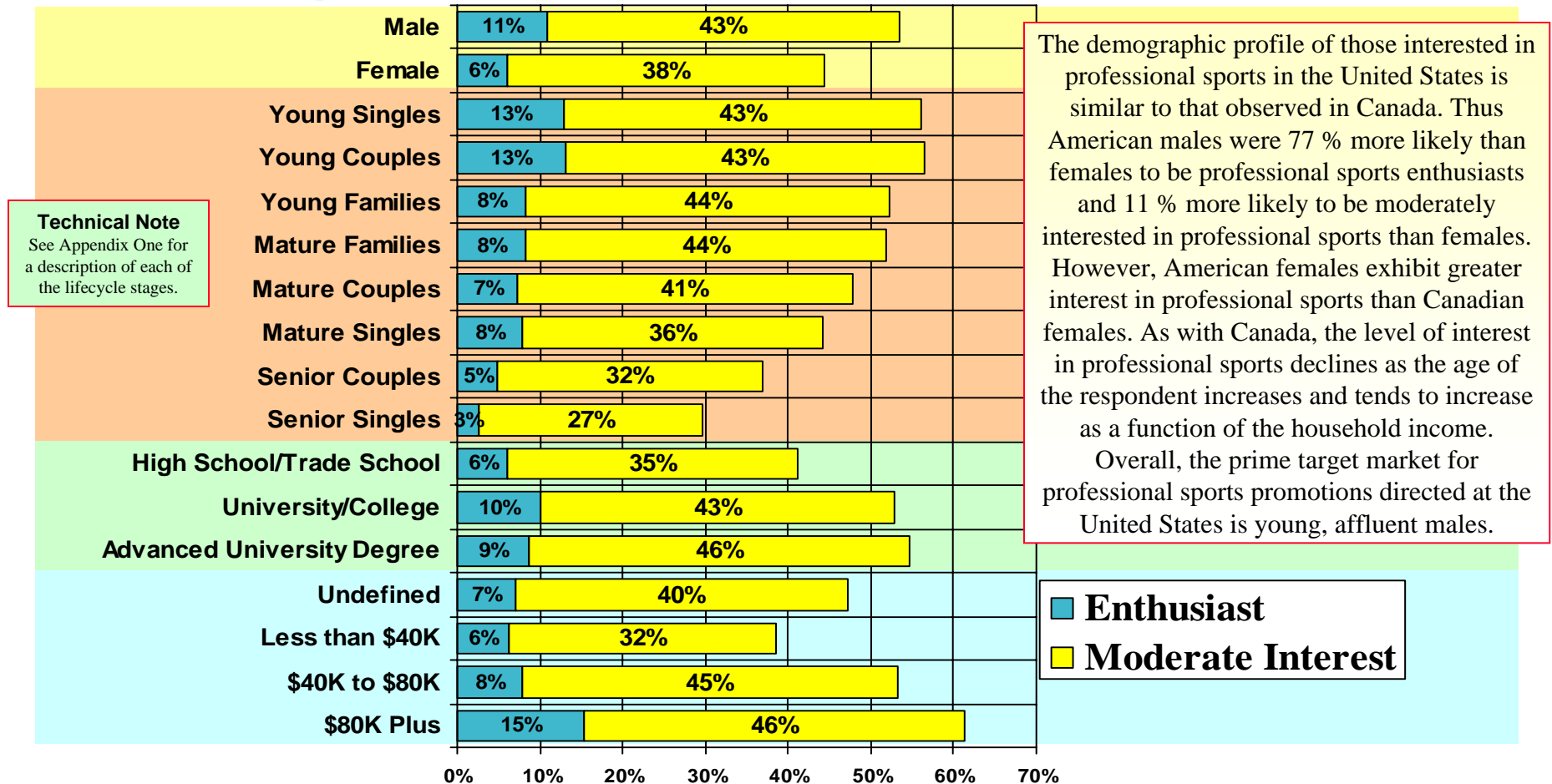


Interest in Professional Sports Based on Attendance At Professional Sporting Events

United States:By Demographics

Based on Day-to-Day and Past Vacation Activity

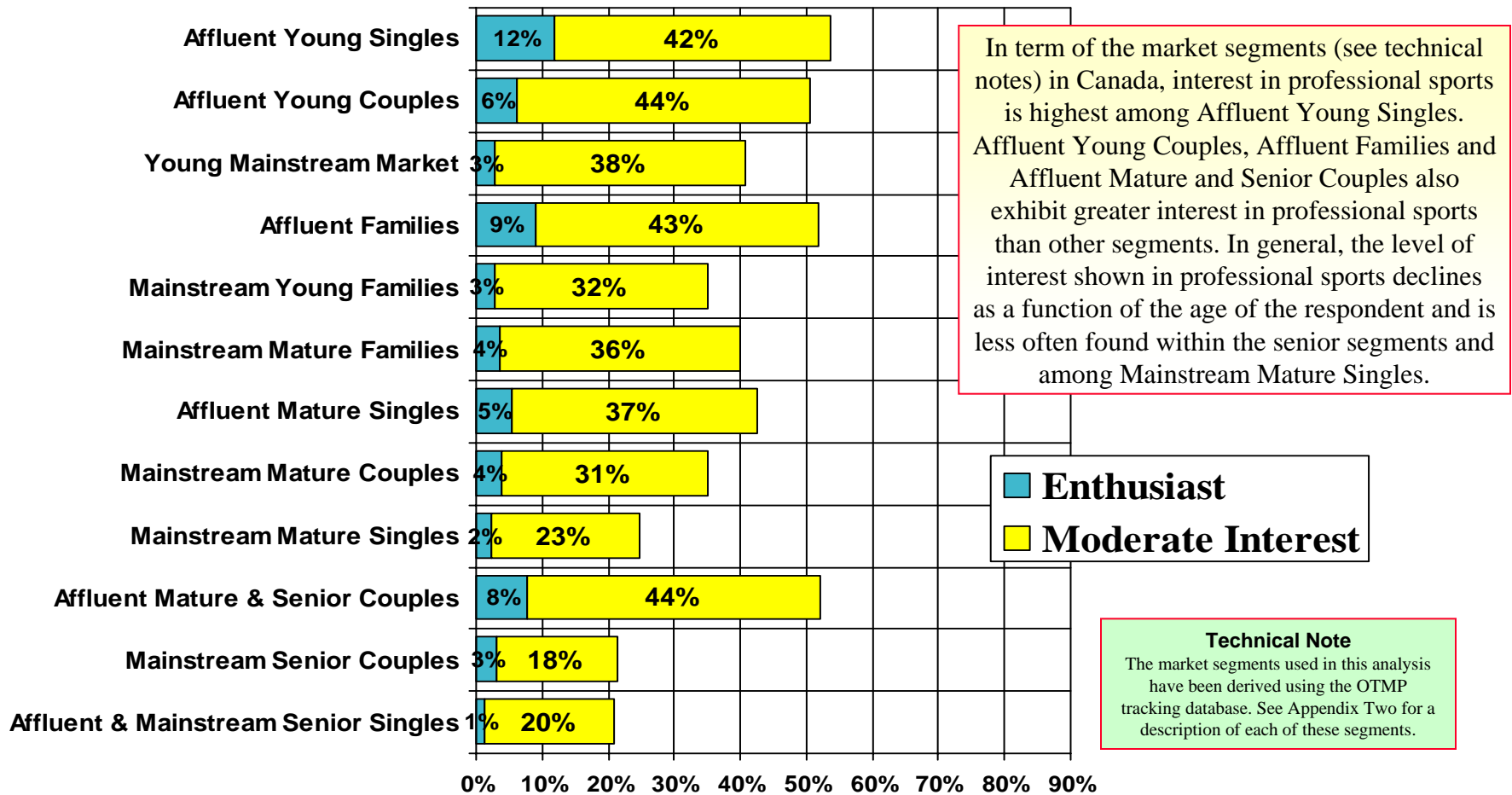
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Interest in Professional Sports Based on Attendance At Professional Sporting Events

Canada: By Market Segment

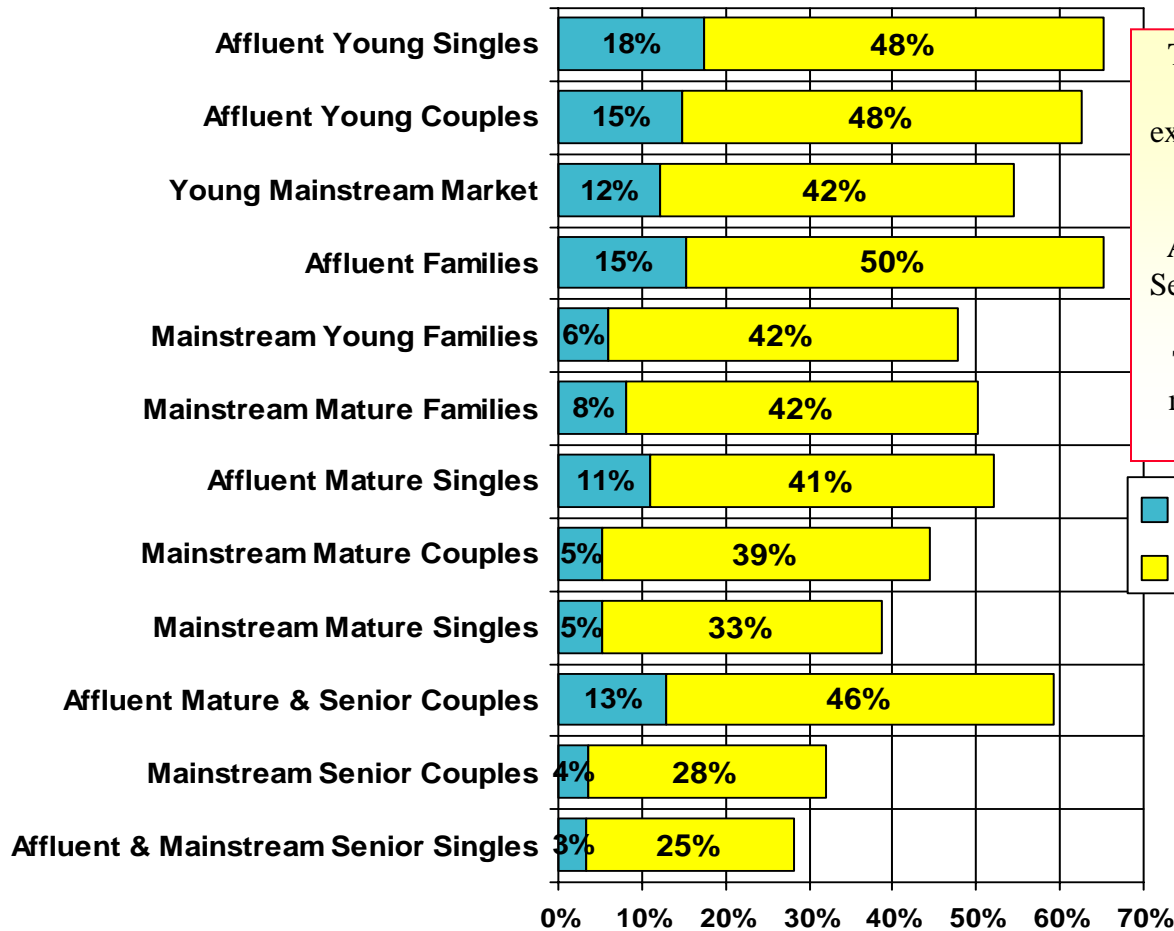
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Interest in Professional Sports Based on Attendance At Professional Sporting Events

United States:By Market Segment

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The same pattern is observed in the United States with the Affluent Young Singles exhibiting the greatest interest in professional sports. As with Canada, Affluent Young Couples, the Young Mainstream Market, Affluent Families and Affluent Mature and Senior Couples also exhibit greater interest in professional sports than other segments. These segments represent the prime target markets for tourism products which have a professional sports theme.

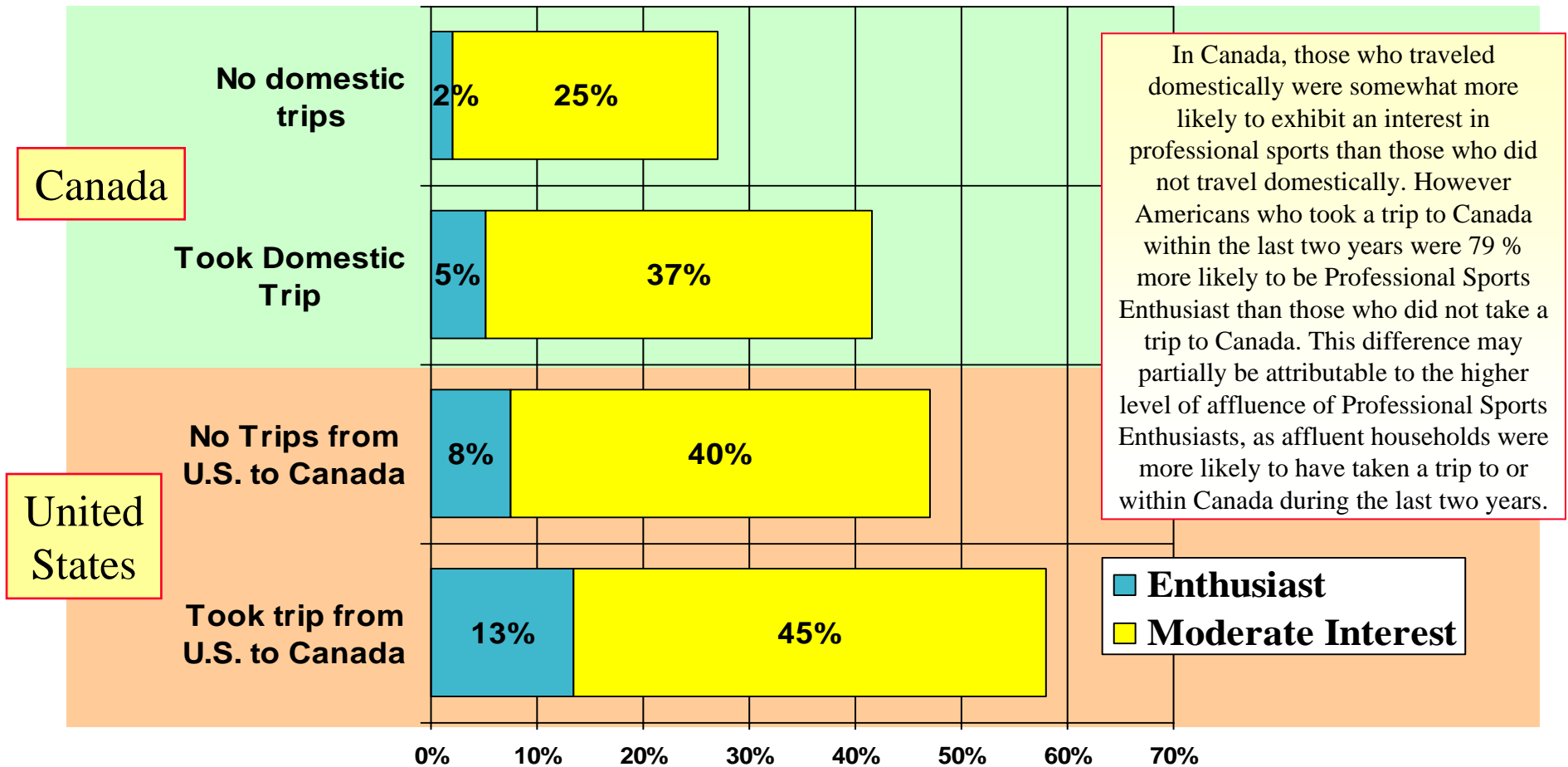
■ Enthusiast
■ Moderate Interest

Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Professional Sports Based on Attendance At Professional Sporting Events

Canada vs. U.S.: By Trips In Canada Last 2 Years

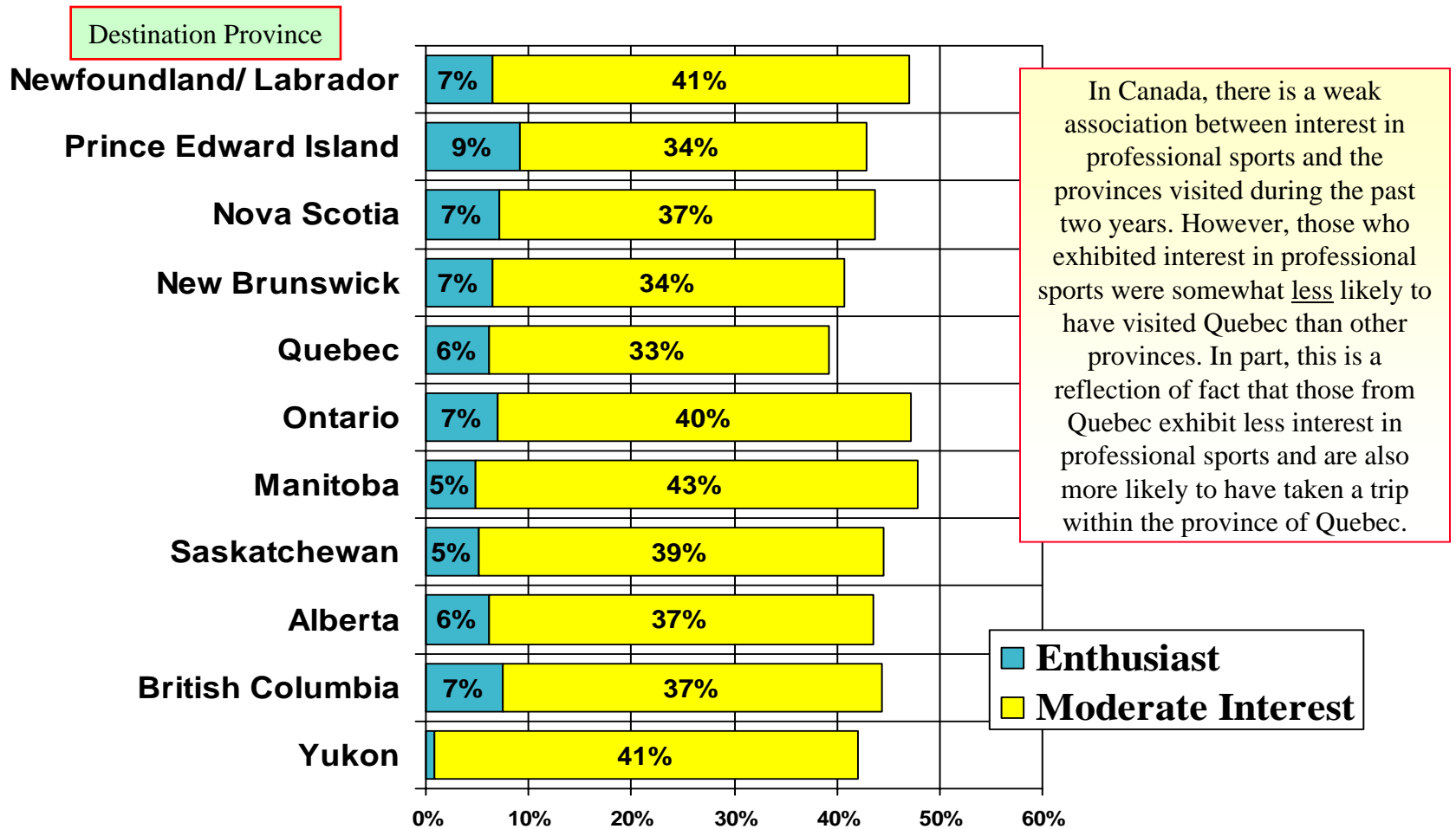
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Interest in Professional Sports Based on Attendance At Professional Sporting Events

Canada: Interest By Province Traveled To

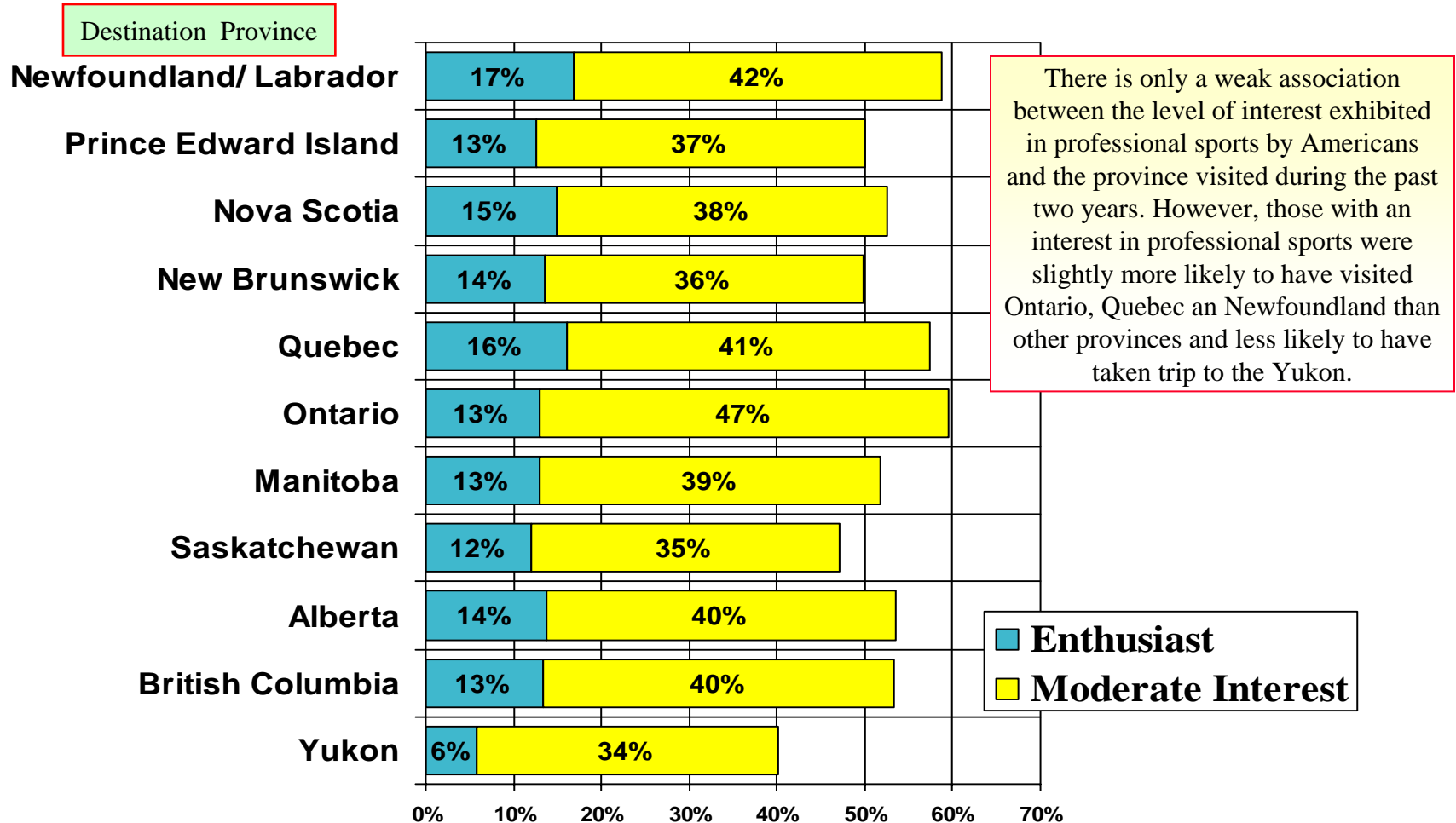
Base: Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years



Interest in Professional Sports Based on Attendance At Professional Sporting Events

United States: Interest By Province Traveled To

Base: Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years

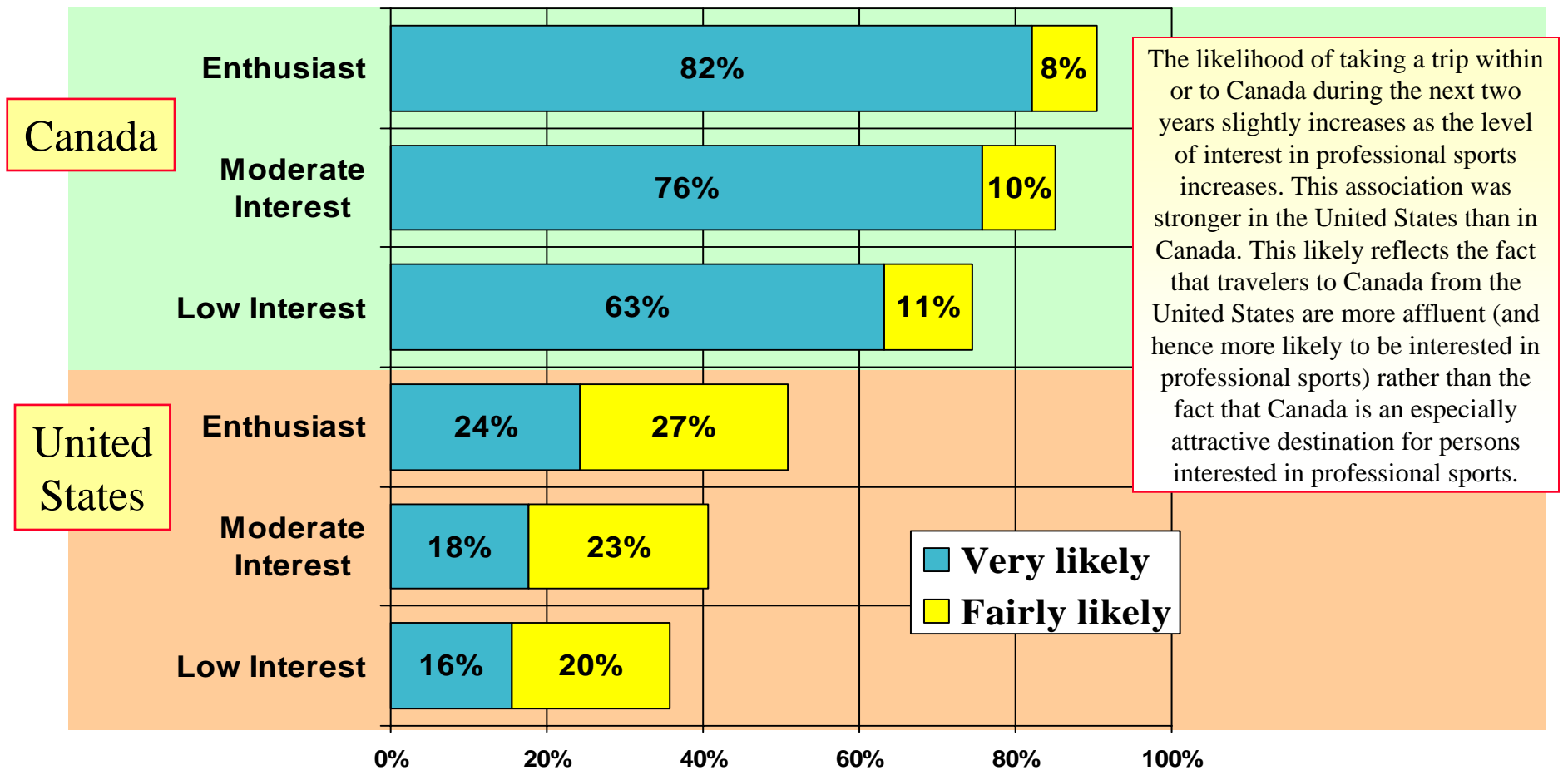


Interest in Professional Sports Based on Attendance At Professional Sporting Events

Intentions to Travel to Canada Next Two 2 Years

Interest in Professional Sports By Intentions to Travel In Canada During Next 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

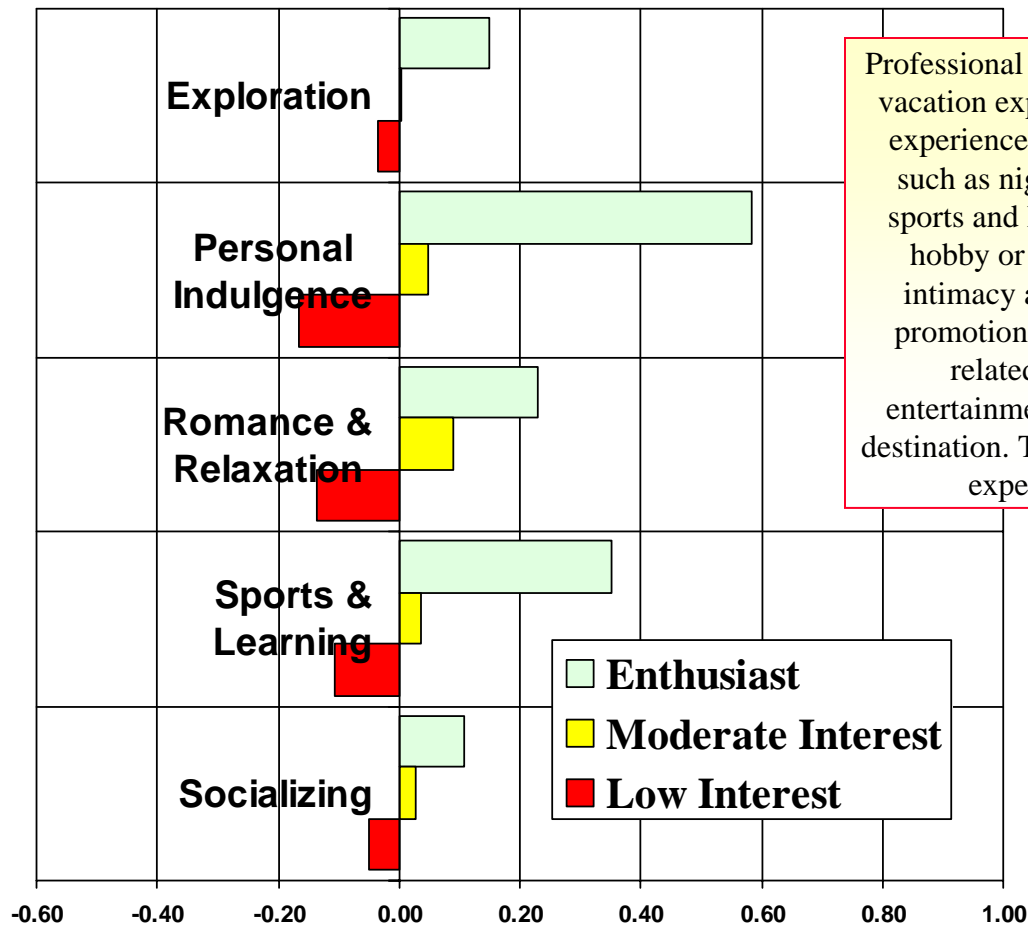


The likelihood of taking a trip within or to Canada during the next two years slightly increases as the level of interest in professional sports increases. This association was stronger in the United States than in Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent (and hence more likely to be interested in professional sports) rather than the fact that Canada is an especially attractive destination for persons interested in professional sports.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

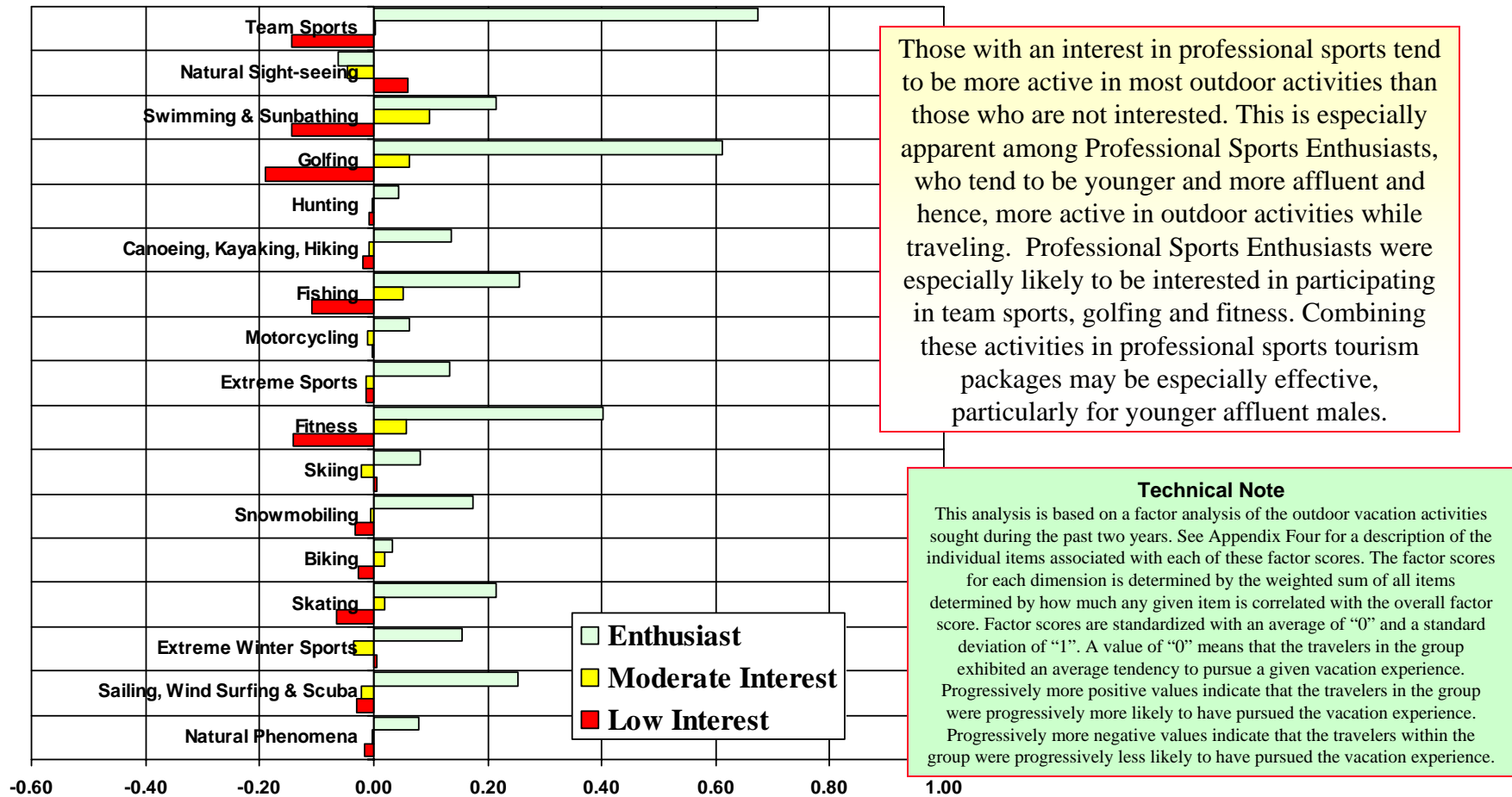


Professional Sports Enthusiasts were more likely to have sought out vacation experiences associated with personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life). They were also more likely to have pursued sports and learning vacation experiences (e.g., to participate in a hobby or sport) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote professional sports-related tourism should emphasize the opportunities for entertainment, personal indulgence and relaxation offered by the destination. There is also a moderate interest in exploratory vacation experiences among Professional Sports Enthusiasts.

Technical Note
This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

By Interest in Professional Sports Based on Attendance At Professional Sporting Events
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

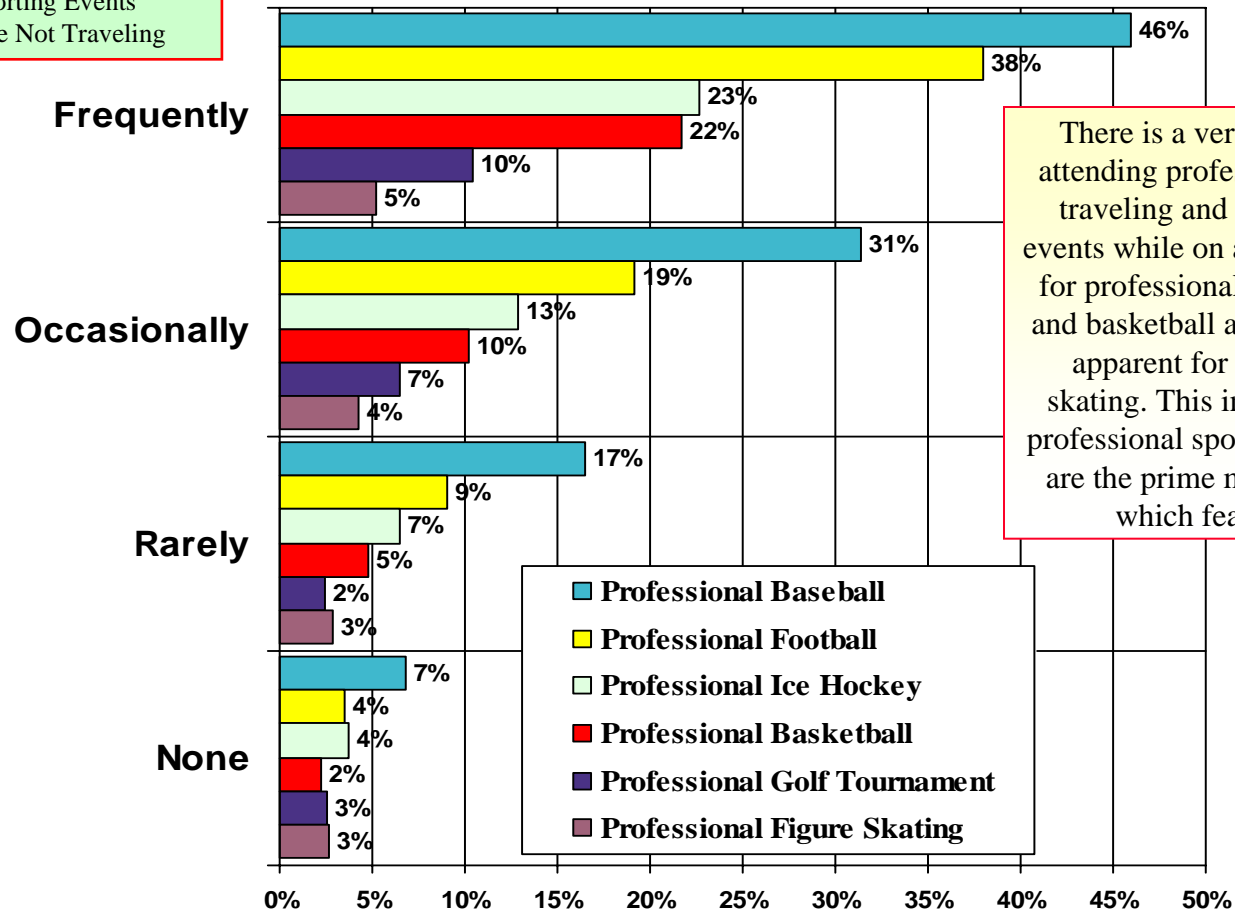


Interest in Professional Sports

Attendance at Sporting Events While Traveling & Not Traveling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

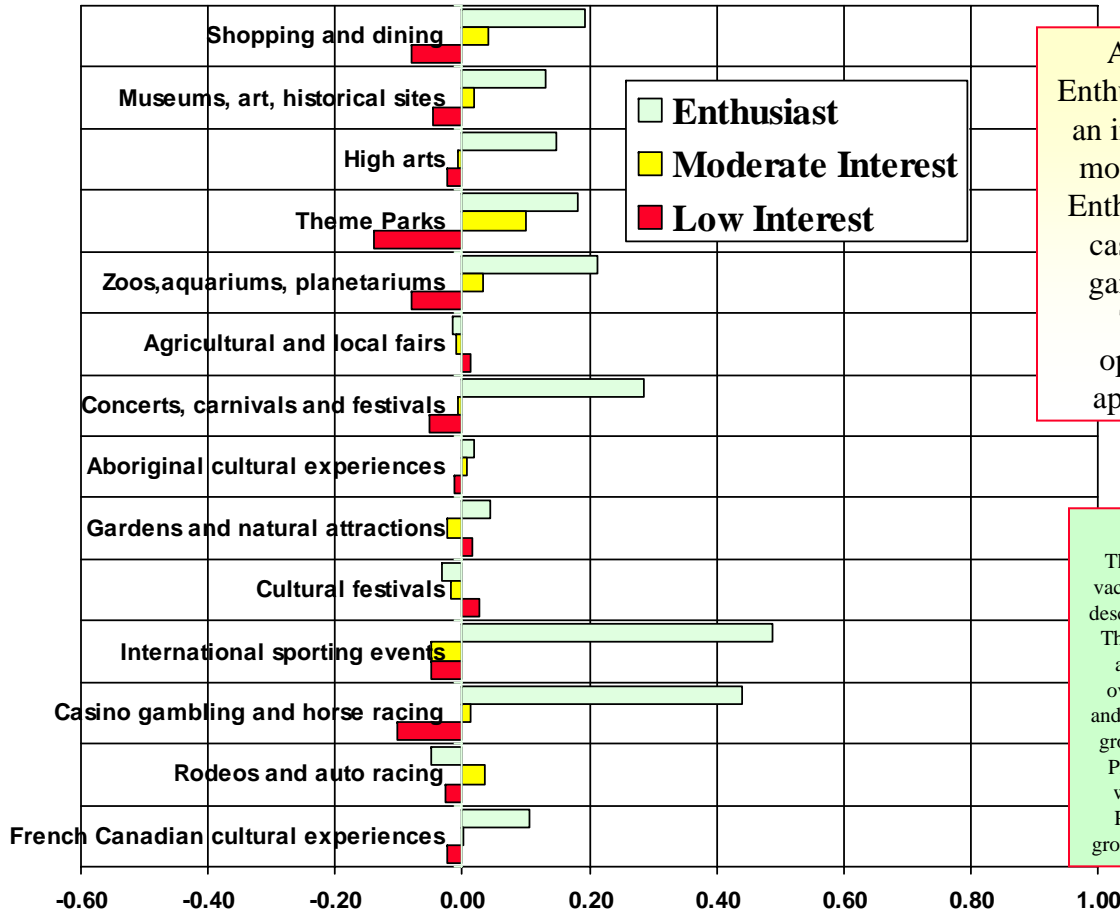
Attendance At Professional Sporting Events While Not Traveling



There is a very strong association between attending professional sports events while not traveling and attending professional sports events while on a trip. This is especially evident for professional baseball, football, ice hockey and basketball although the relationship is also apparent for professional golf and figure skating. This indicates that those who attend professional sporting events while not traveling are the prime market for tourism promotions which feature professional sports.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

By Interest in Professional Sports Based on Attendance At Professional Sporting Events
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



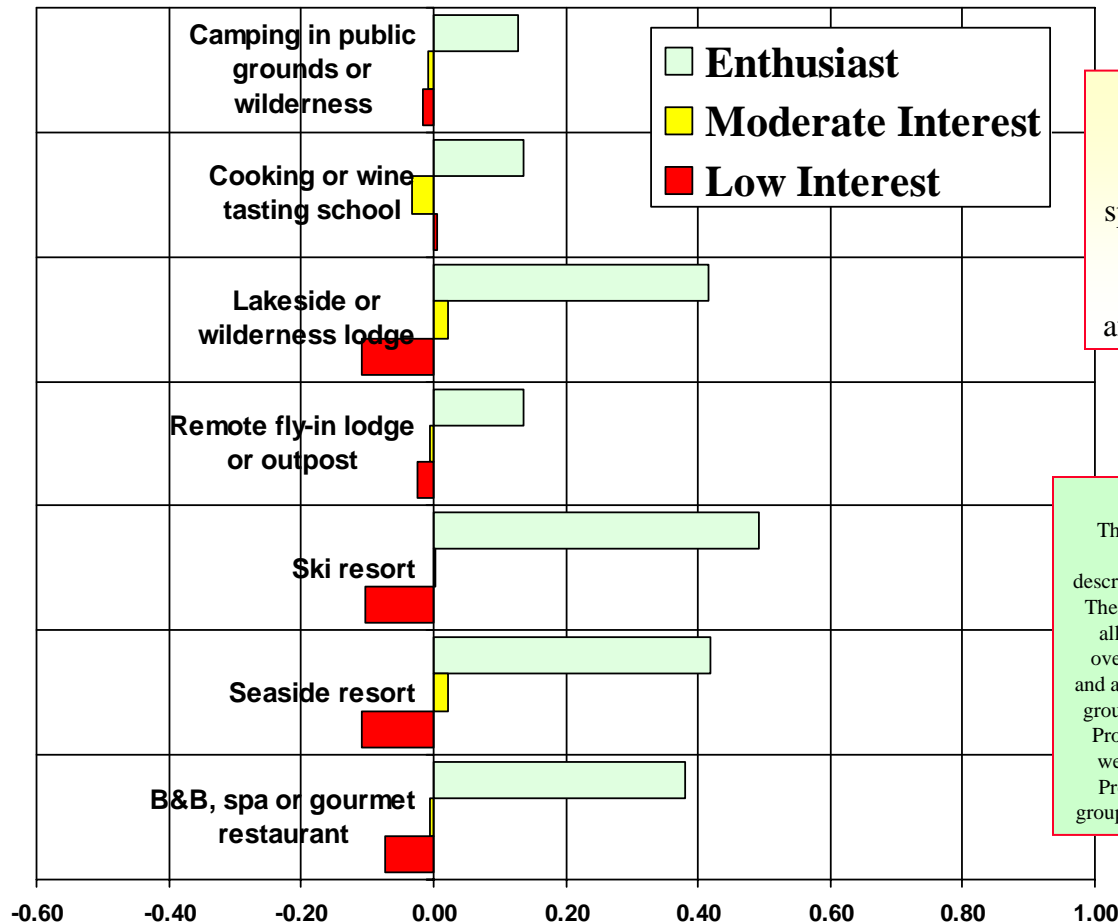
As would be expected, Professional Sports Enthusiasts are much more likely to have attended an international sporting event than those with a moderate or low interest in professional sports. Enthusiasts are also more likely to have visited a casino or gone to a horse race suggesting that gambling appeals to this sector of the market. Thus combining professional sports with opportunities to gamble may be particularly appealing to Professional Sports Enthusiasts.

Technical Note
This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



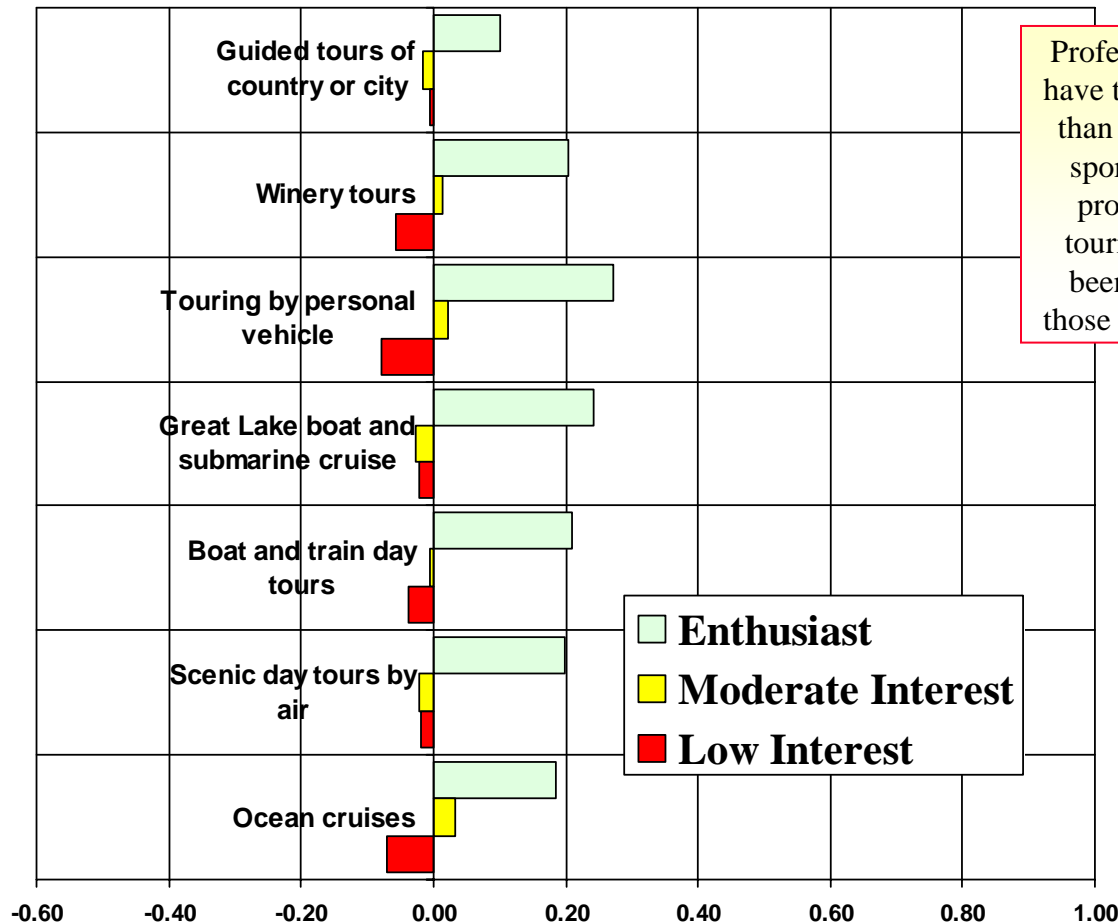
Professional Sports Enthusiasts were more likely to have stayed in a seaside resort, a ski resort, a lakeside wilderness lodge or a B&B, spa or gourmet restaurant with accommodations than those with less interest in professional sports. This pattern likely reflects the relative affluence of the Professional Sports Enthusiasts.

Technical Note
This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



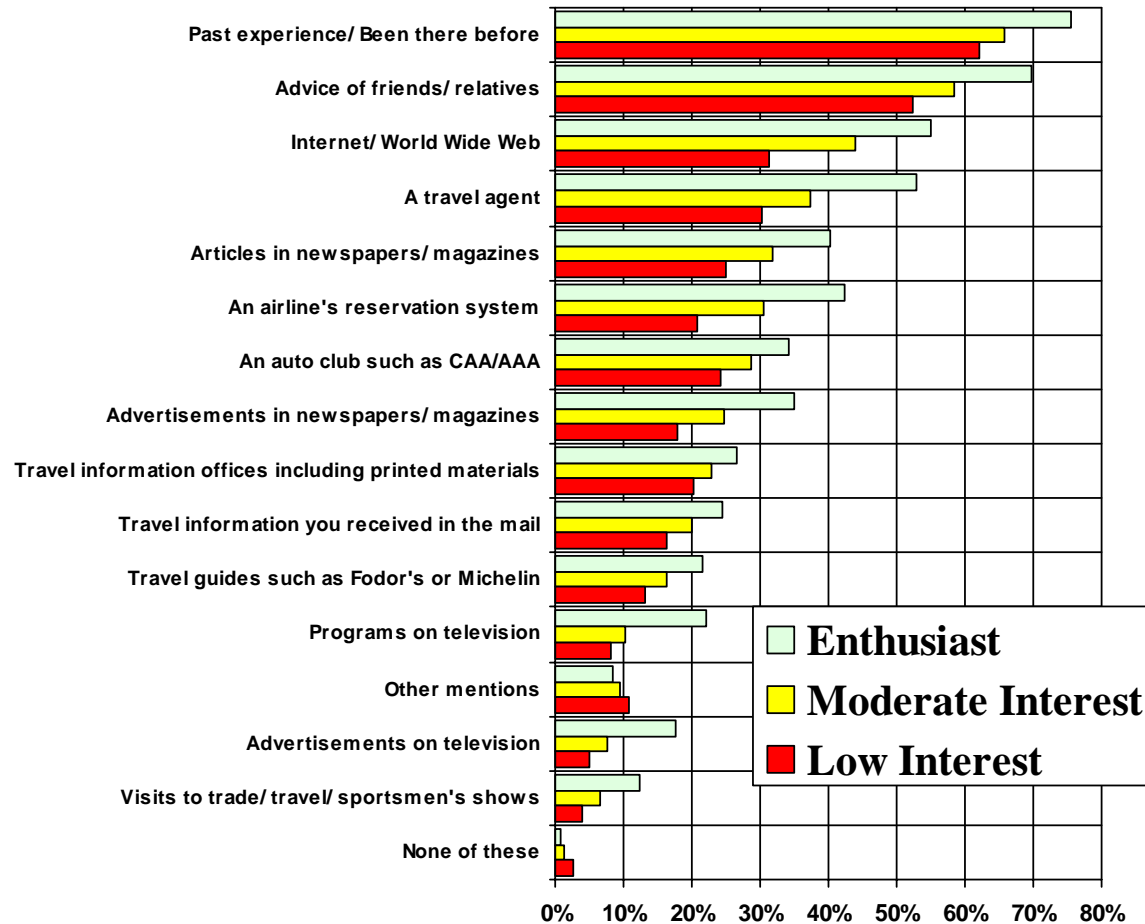
Professional Sports Enthusiasts were more likely to have taken all seven types of tours in the last 2 years than those with a moderate interest in professional sports and especially those with a low interest in professional sports. There is no specific type of touring activity which is especially likely to have been taken by Professional Sports Enthusiasts or those with a moderate interest in professional sports.

Technical Note
 This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Sources of Information Consulted to Plan Brief Vacations

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

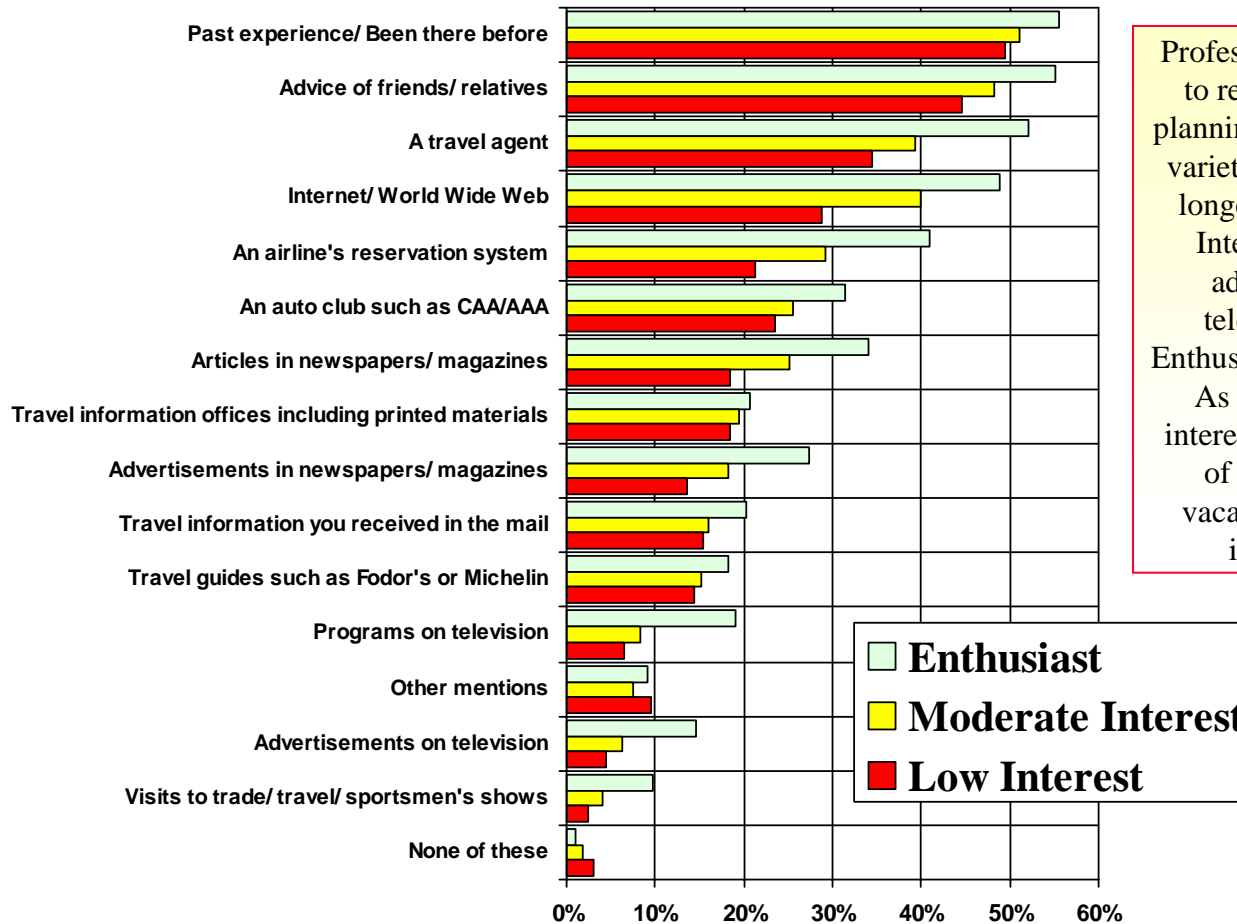


Professional Sports Enthusiasts are more likely to rely on the advice of family and friends when planning brief vacations than others. They also consult a larger variety of information sources when planning their brief vacations and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising and television programming and advertising. Those with a moderate interest in professional sports also consult a larger array of information sources when planning brief vacations than those with low interest, but fewer information sources than the Enthusiasts. Once again, this pattern is partially attributable to the relative affluence of the Professional Sport Enthusiasts.

Sources of Information Consulted to Plan Longer Vacations

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



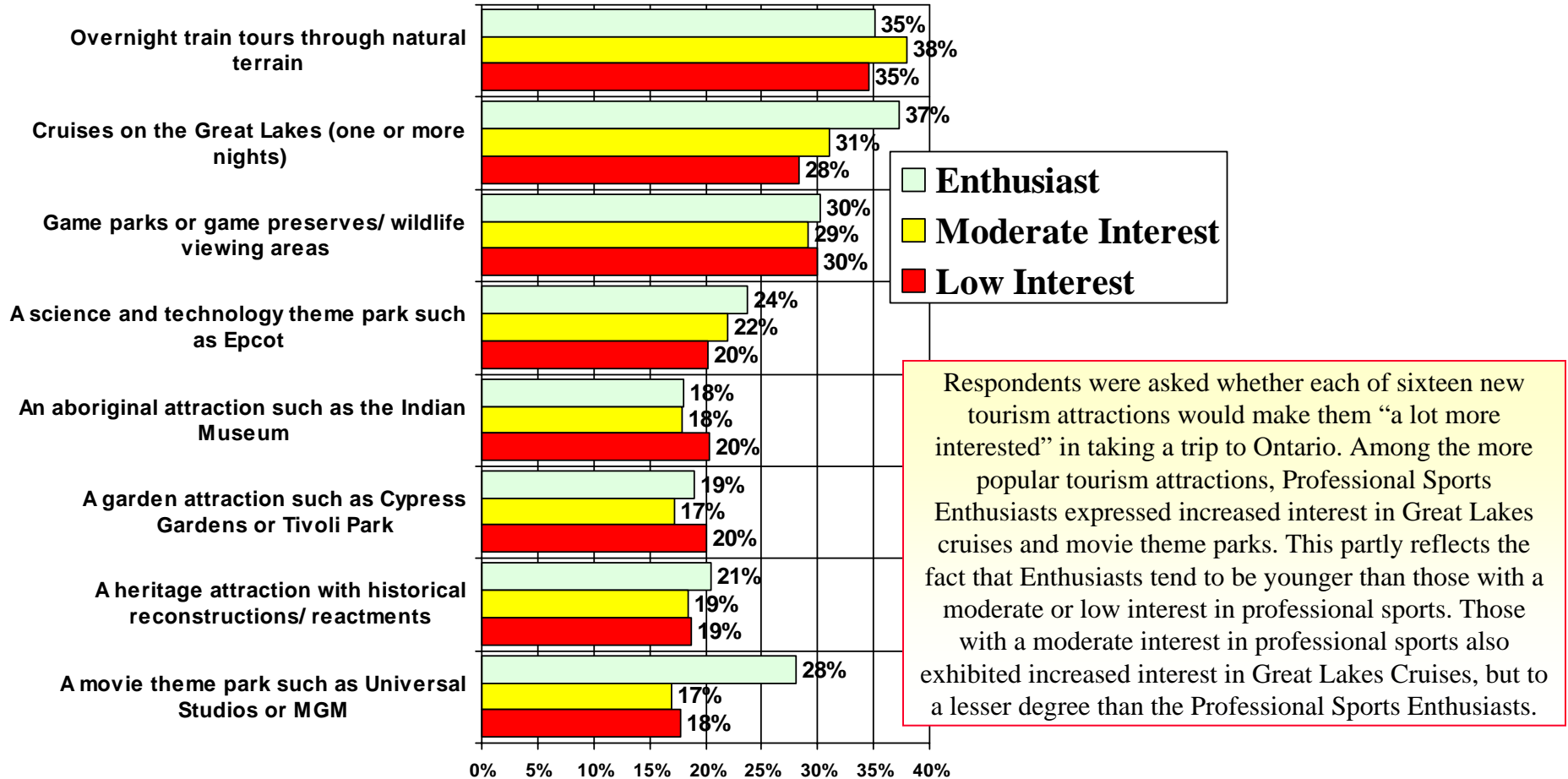
Professional Sports Enthusiasts are also more likely to rely on the advice of family and friends when planning longer vacations. They also consult a larger variety of information sources when planning their longer vacations and especially travel agents, the Internet, newspaper and magazine articles and advertising, airline reservation systems, and television programming and advertising. The Enthusiast are also more to attend travel trade shows. As with brief vacations, those with a moderate interest in professional sports consult a larger array of information sources when planning longer vacations than those with low interest, but fewer information sources than the Enthusiasts.

Interest in New Tourism Products

By Interest in Professional Sports Based on Attendance (Part One of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

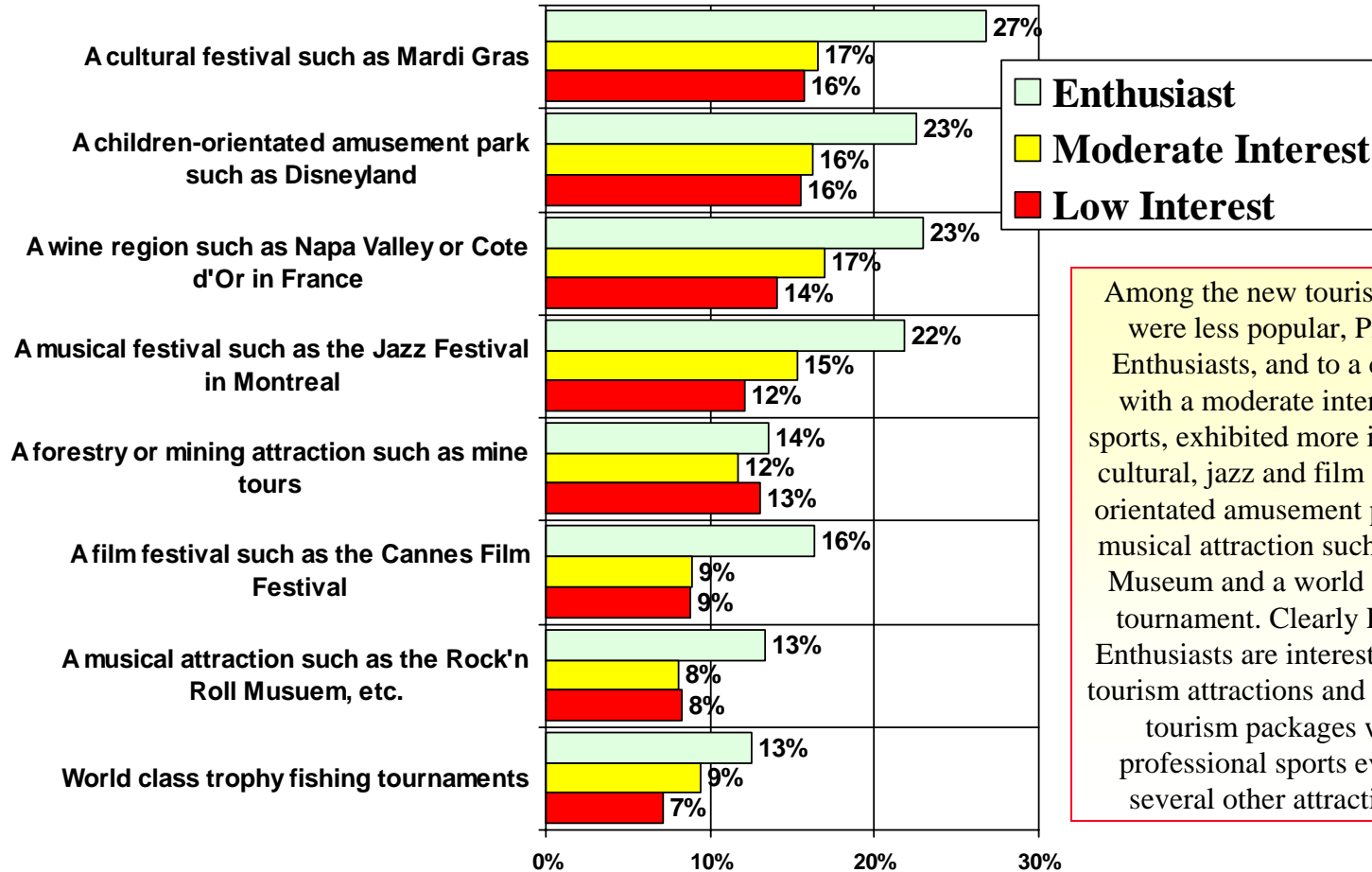


Interest in New Tourism Products

By Interest in Professional Sports Based on Attendance (Part Two of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



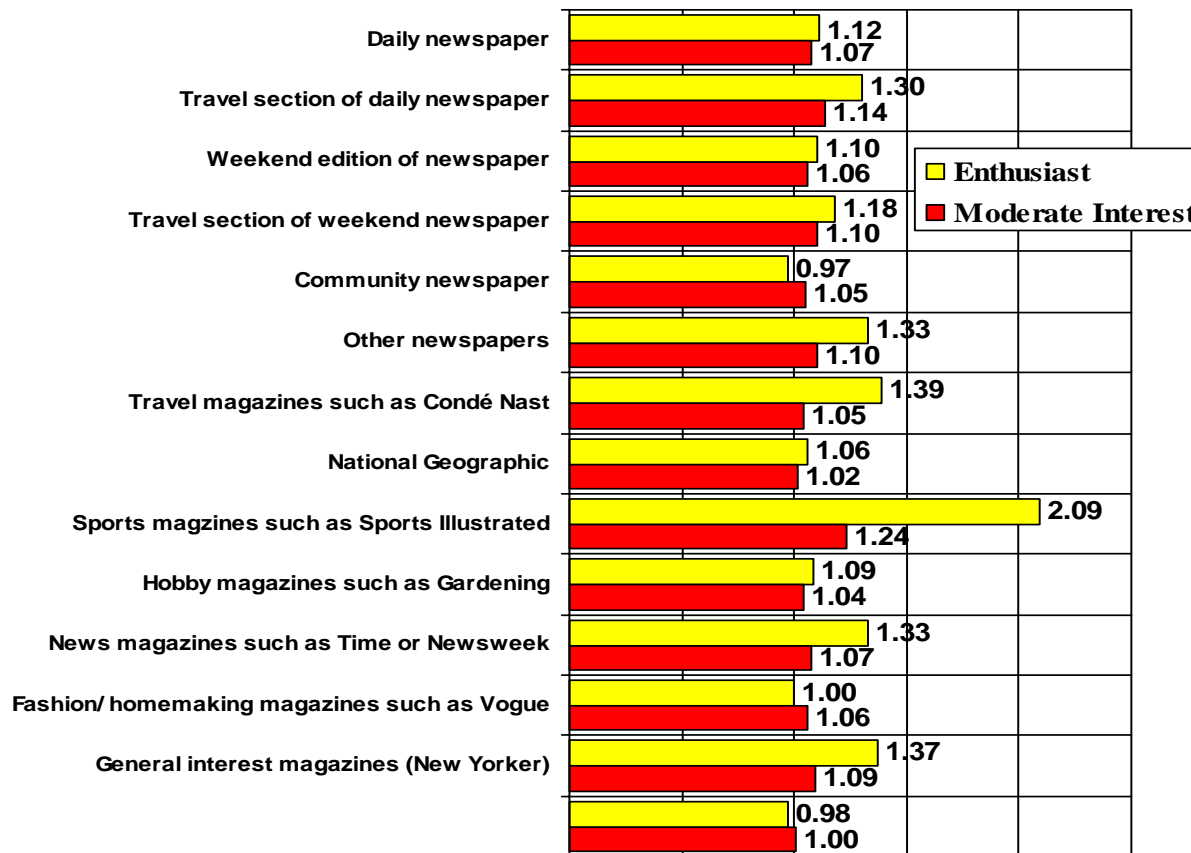
Among the new tourism attractions which were less popular, Professional Sports Enthusiasts, and to a certain extent those with a moderate interest in professional sports, exhibited more interest than others in cultural, jazz and film festivals, a children-orientated amusement parks, a wine tour, a musical attraction such as the Rock ‘n Roll Museum and a world class trophy fishing tournament. Clearly Professional Sports Enthusiasts are interested in many different tourism attractions and may be responsive to tourism packages which combine a professional sports event with passes to several other attractions in the region.

Media Index for Print Media: Canada & United States

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Percent Reading Each Publication Type Among Those With An Interest in Professional Sports
By Percent Reading Each Type of Publication in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that sports magazines are the most efficient channels by which to reach Professional Sports Enthusiasts. Enthusiasts are also more likely to read the travel section of their daily newspaper, travel magazines, news magazines and general interest magazines such as the New Yorker. Those with a moderate interest in professional sports were also more likely to read sport magazines and the travel section of their daily newspaper.

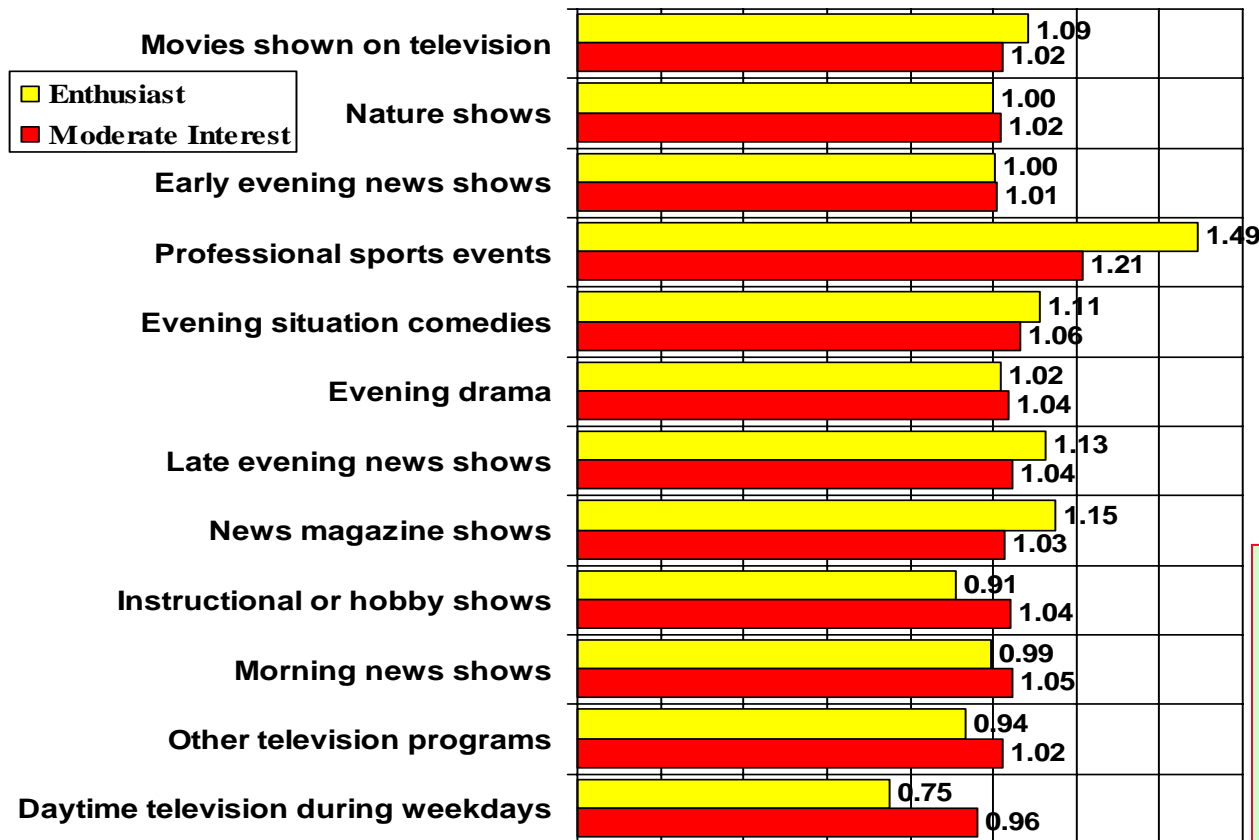
Technical Note
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in professional sports were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Percent Watching Each Type of Television Program Among Those With An Interest in Professional Sports By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

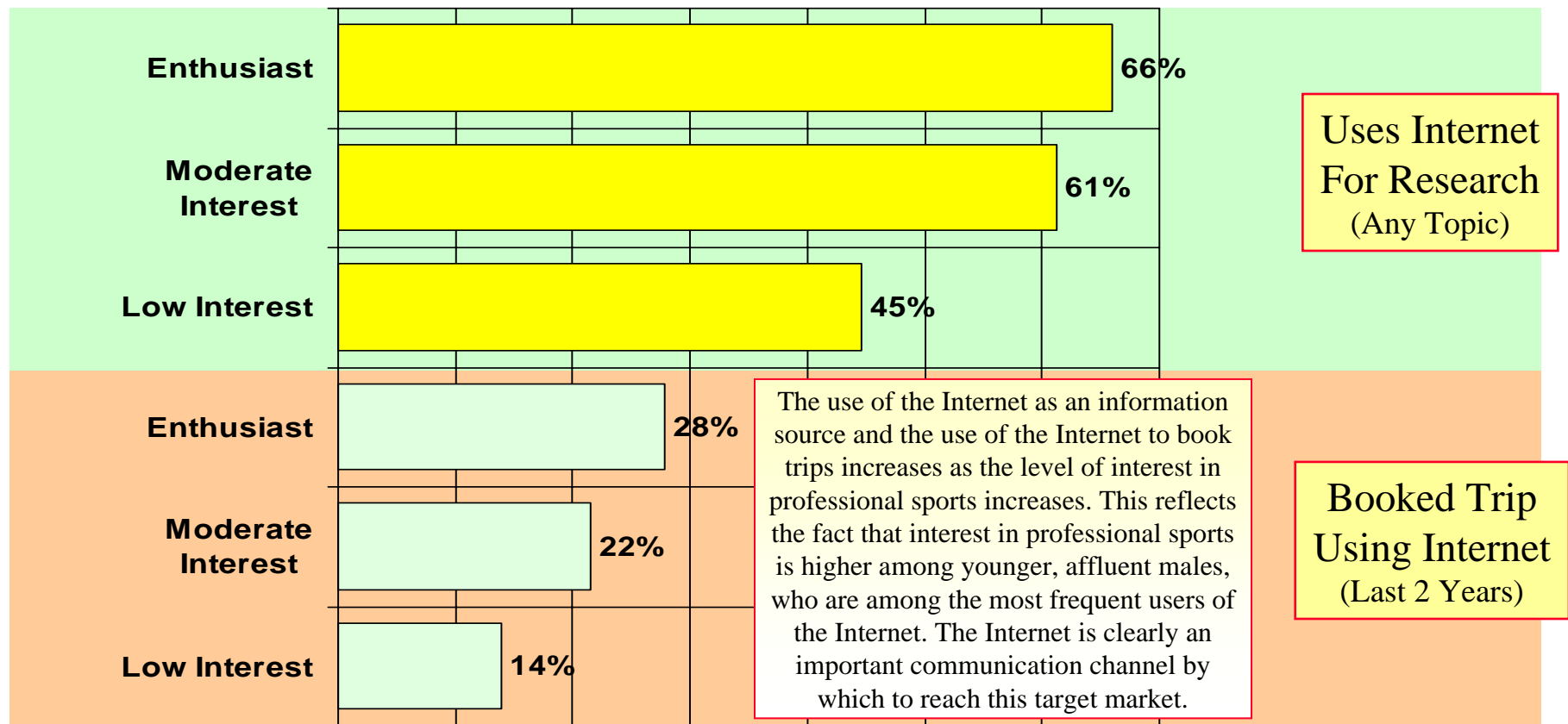


Professional Sports Enthusiasts, and to a certain extent, those with a moderate interest in sports, are much more likely to watch sports programming on television and this is clearly the most efficient type of programming by which to reach this target market. Enthusiasts are also more likely to watch late evening news and news magazine programming than those with a moderate or low interest in professional sports.

Technical Note
 The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in professional sports were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet By Interest in Professional Sports Based On Attendance

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Destination Image Mapping

- Technical Explanation -

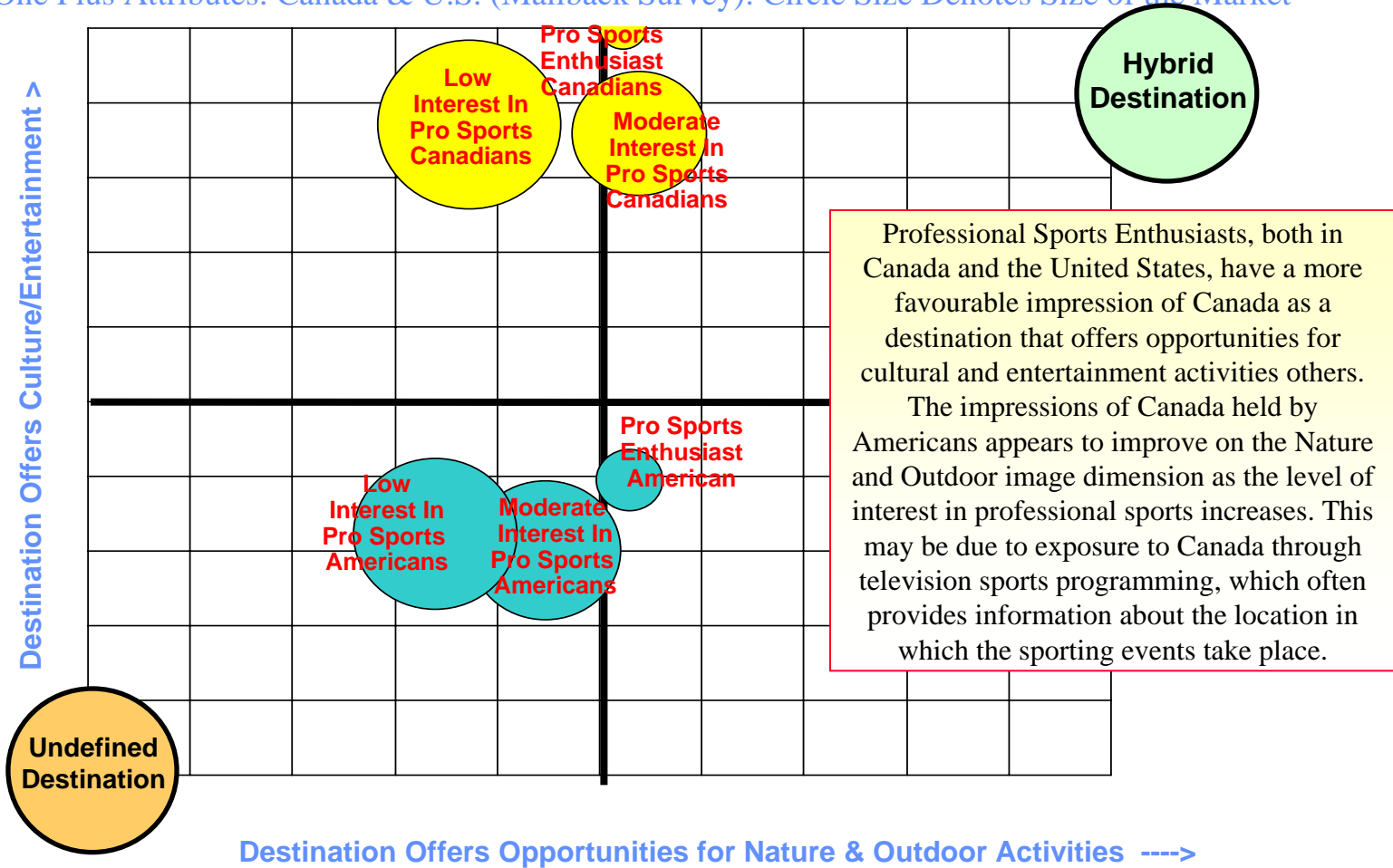
Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify the general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.



Canadian Vacation Imagery

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

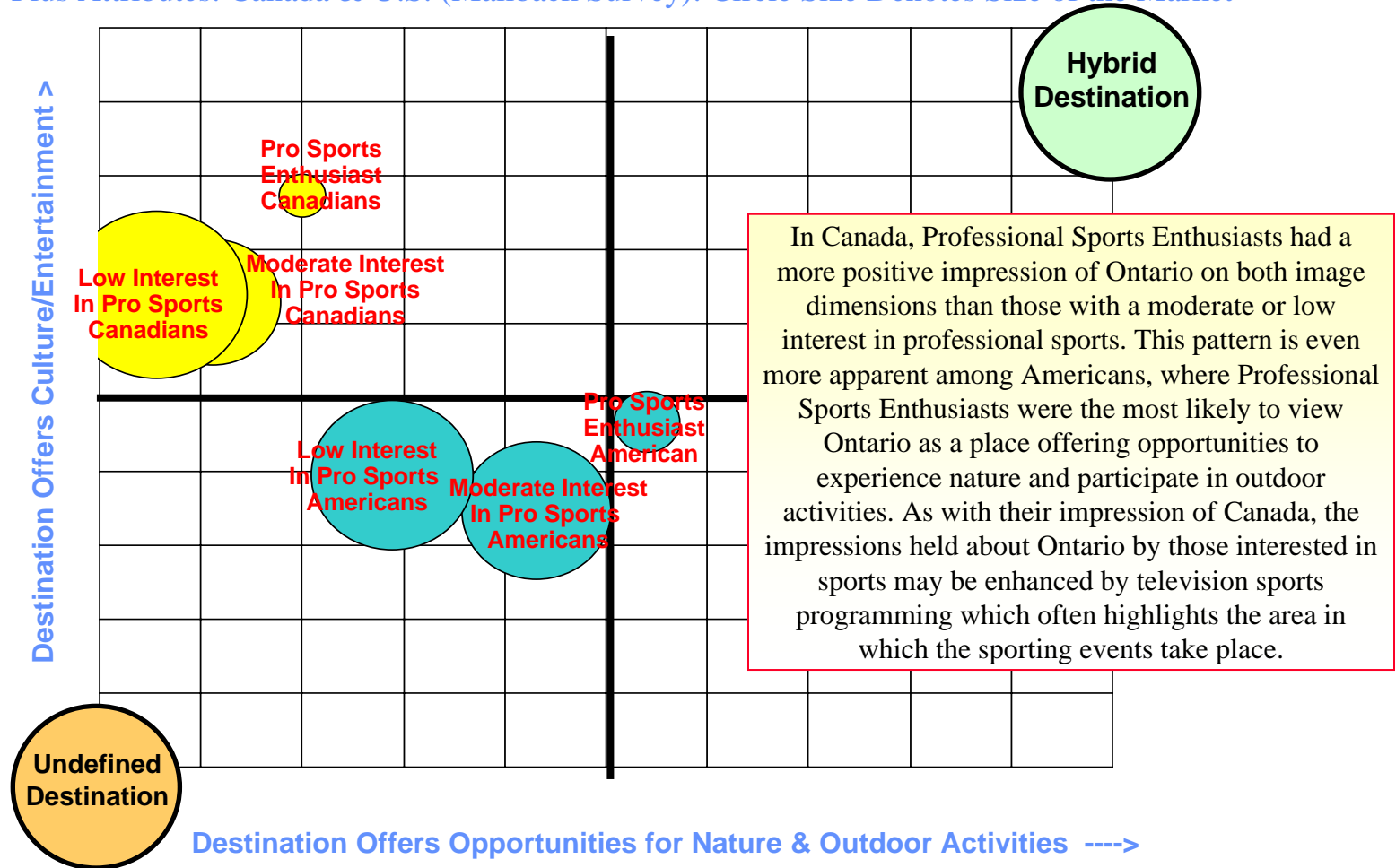


Professional Sports Enthusiasts, both in Canada and the United States, have a more favourable impression of Canada as a destination that offers opportunities for cultural and entertainment activities others. The impressions of Canada held by Americans appears to improve on the Nature and Outdoor image dimension as the level of interest in professional sports increases. This may be due to exposure to Canada through television sports programming, which often provides information about the location in which the sporting events take place.

Ontario Vacation Imagery

By Interest in Professional Sports Based on Attendance At Professional Sporting Events

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

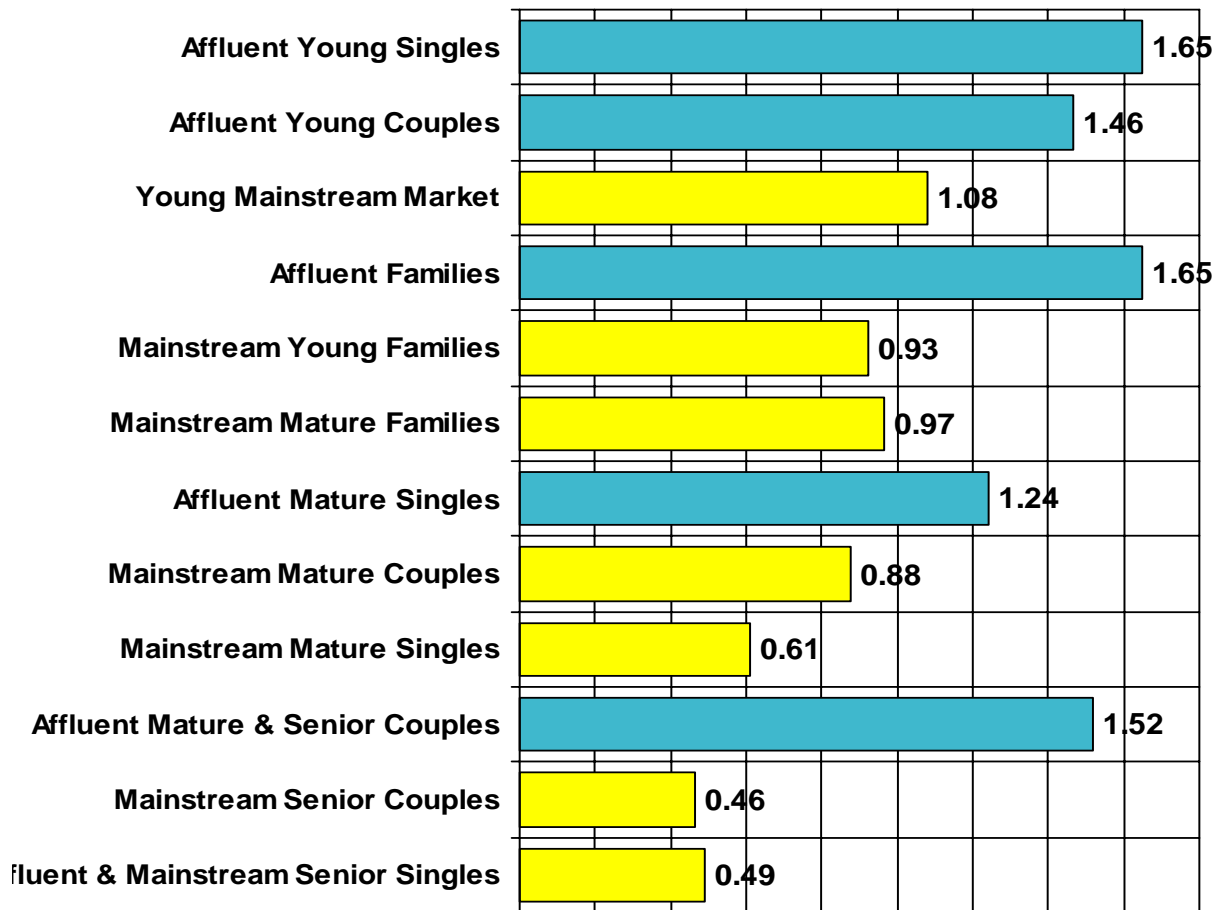


Overall Market Potential

Interest in Professional Sports:Canada

Interest in Professional Sports By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote professional sports. This Index indicates that in Canada, Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature and Senior Couples represent the prime target markets for such initiatives. The Affluent Mature Singles is also important secondary market for professional sports related tourism promotional activities. These five markets represent 24.5 % of the Canadian travelers.

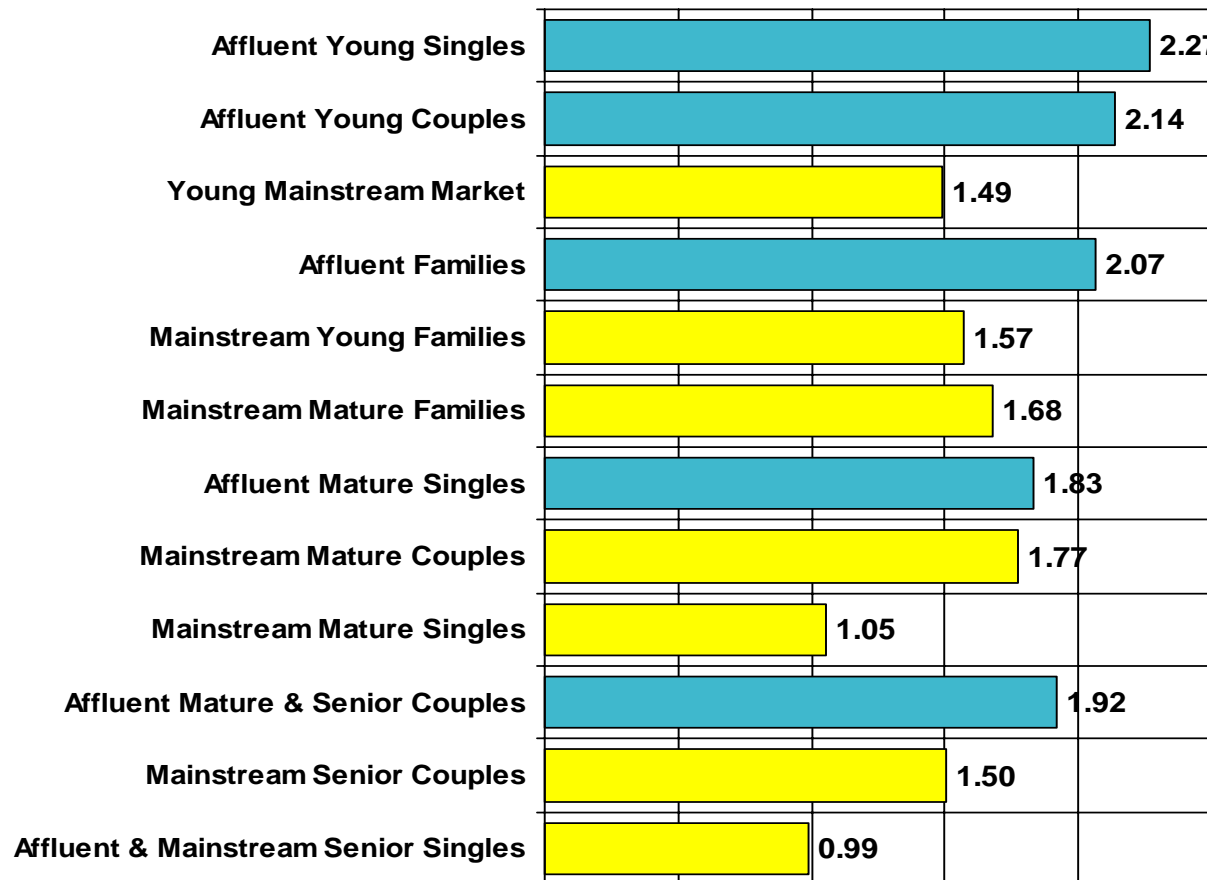
Technical Note
The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Professional Sports related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Professional Sports: United States

Interest in Professional Sports By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index for the United States shows a similar pattern as that observed for Canada. However, in the United States, the Affluent Young Singles, Affluent Young Couples and Affluent Families are the more likely to be responsive to such initiatives than other affluent segments. The Affluent Mature Singles, Mainstream Mature Couples and Affluent Families and Affluent Mature Singles also represent important secondary markets for professional sports related tourism promotional activities. These six segments represent 41% of the U.S. travelers.

Technical Note
 The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Professional Sports related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.