



Bouncing Back

Preparing for a Sport Hosting
and Economic Reboot

Part 3: Canadians - Sports
Fans and Participants

June 2021

Note from Sport Tourism Canada

After a turbulent 2020 that continues into 2021, Sport Tourism Canada has been focused on how sport hosting can return safely and how our segment can play a role in the recovery from the deep impacts of COVID-19. As part of our work, we have been energized by the spirit of collaboration from many industry partners.

In partnership with Destination Canada, we are pleased to present the third in a series of reports that will help to explore and define the challenges facing the recovery of sport tourism. This report, “**Bouncing Back: Preparing for a Sport Hosting and Economic Reboot - Canadians**” incorporates the opinions of Canadian sport fans, sport participants and parents of young sport fans / participants.

We sincerely appreciate the support of Destination Canada and the input of sport hosting groups and supporting industry players from the local to national levels from every province and territory across Canada.

Sport tourism, which made a \$6.8 billion (CAD) annual contribution to the Canadian economy in the pre-pandemic era, has started to re-emerge in various forms. We hope that this report will help sport tourism in Canada to get on the pathway to a full recovery and even brighter future.

Best Regards,

Rick Traer
CEO



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Executive Summary

Key Messages

Highlights

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

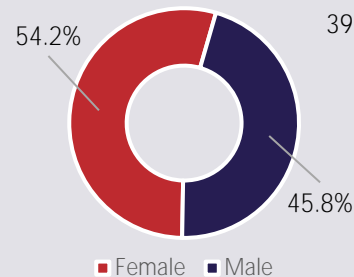
In partnership with Destination Canada, Sport Tourism Canada is pleased to present the third in a series of three (3) reports that will help to explore and define the challenges facing the recovery of sport tourism. This report seeks to answer some pivotal questions for the industry:

What is consumer sentiment for sport event attendance and participation?

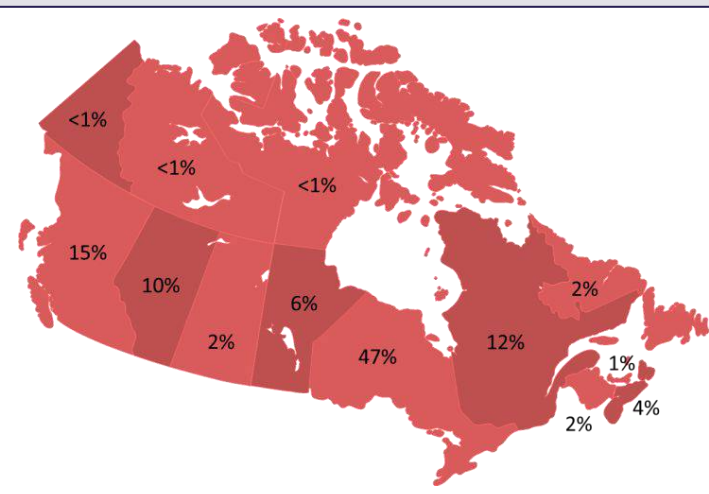
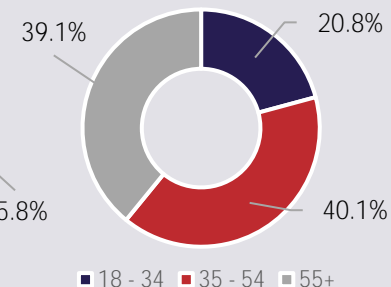
What will a return to sport participation and spectating look like?

What factors improve the likelihood for a speedier recovery?

Gender



Age Range



Sport Tourism Canada conducted a nationally representative* study collecting 1,007 responses from Canadians, sports fans, and parents of child(ren) participating in sports. Sport and sport tourism plays a role in all parts of Canada and COVID-19 has wreaked havoc on this aspect of our lives for all ages. It will take time for participation levels to return and sport events to get fully back to normal operation but they will both play a significant role in Canada's recovery from the pandemic.

"The pandemic has had a tremendous impact on all Canadians, but this concerning data suggests that our sport community needs to do everything we can to support the long-term welfare of Canadian youth, by remaining engaged in sport,"

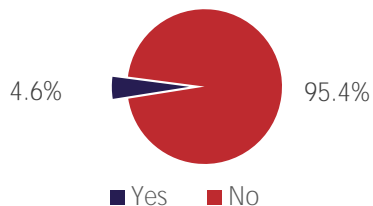
Dan Wilcock, President and CEO, Canada Games Council speaking to a national study on the impact of the pandemic on youth activity in sport

* Nationally representative by age, gender, and place of residence. Quebec was slightly under-represented at only 12%.

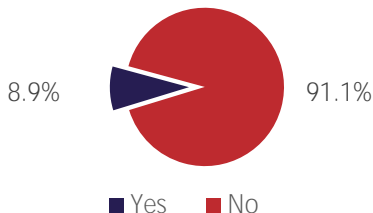
Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Sport Attendance & Participation

Have you or your family attended any sporting events since the pandemic was declared?



Have you or your family participated in any sporting events or organized sporting activities since the pandemic was declared?



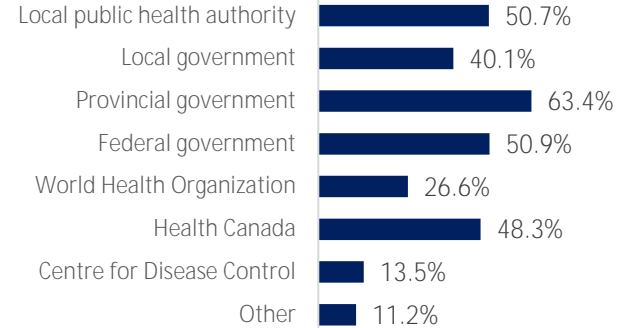
From those who indicate they attended or participated in sports prior to the pandemic, these charts are very stark demonstrations of the challenges caused by COVID-19. With virtually no events taking place since the pandemic was declared, it is no surprise to see only 5% of respondents having attended an event. With host cities and event rights holders often relying heavily on the movement of people and the sale of tickets, this has an immense impact on their operations.

What may even more complex to consider is the volume of people, 91%, who have not participated in any sporting events or organized sport activities in that time. Despite brief periods of time in and around restrictions where participatory sport was permitted, largely Canadians have been left to their own devices to maintain a level of physical activity. Again, rights holders often rely heavily on revenue from participation in events and activities, as do host cities from the related economic impact, so this too has a large impact, not to mention the potential long-term effects on participation in sport and the physical and mental health of Canadians.

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

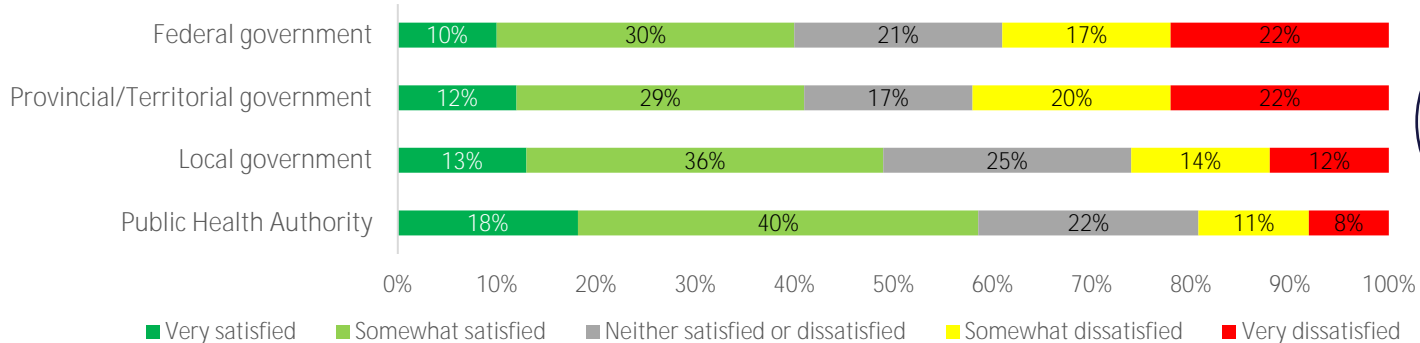
Information Sources & Handling of the Pandemic

Many sources have provided Canadians with information throughout the pandemic. The federal government, along with its provincial and territorial counterparts, have steered restrictions and vaccination rollouts which have been both praised and criticized. This is shown in the data as people are divided regarding the satisfaction of their performances. Public health authorities are perhaps seen as information providers, as opposed to rule makers, so their approval level is higher. As vaccinations have rolled out, and COVID cases have dropped, it can be expected levels of satisfaction for all public officials will rise.



Source(s) utilized for pandemic information?

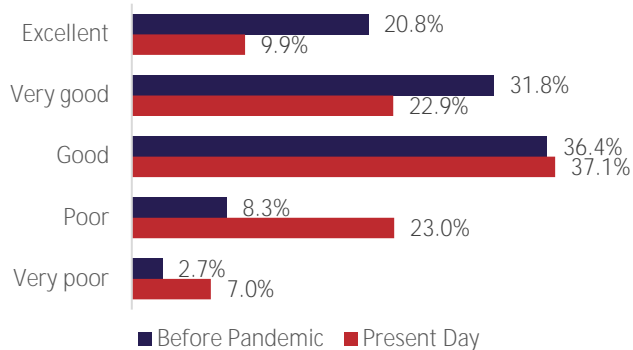
Satisfaction on Handling of Pandemic



Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Mental & Physical Health

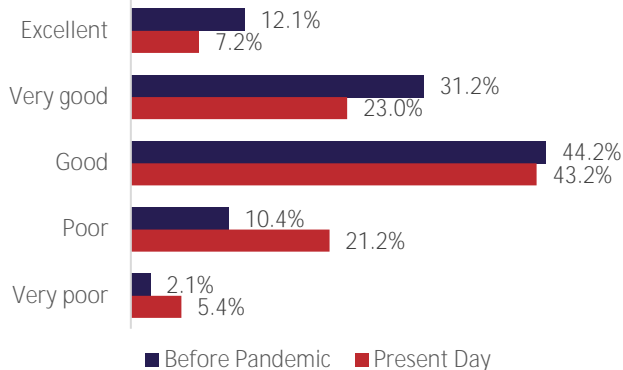
Mental Health



From respondents of all ages, in those indicating excellent or very good mental health, there is a precipitous drop from 53% to 33% from pre-pandemic to present day and a reciprocal jump from 11% to 30% in those who now indicate poor or very poor mental health. This is a troubling discovery and could form the basis of the mental health crisis that some health care experts have been predicting due to a lack of interaction, lock downs and an elimination of many regular activities.

Changes and drops in physical health were also noted, though more in the middle of the scale than at the poles. Those with previous very good physical health dropped from 31% to 23%, while those who indicated poor moved from 10% to 21%.

Physical Health



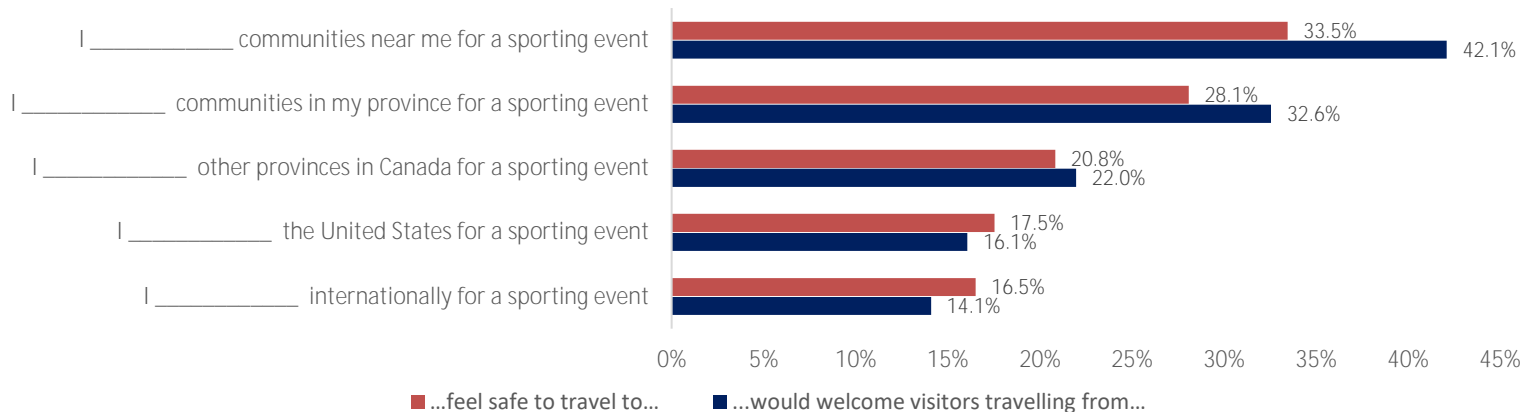
"The pandemic has been incredibly hard for many people. There has been significant loss—of loved ones, of connection, of feelings of security. This can contribute to very challenging emotions, and it is important to acknowledge and process." says lead researcher Emily Jenkins, a professor of nursing at UBC, of a study done with the Canadian Mental Health Association. (May 3, 2021)

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Sentiment for Travelling & Welcoming Visitors for Sport Events

With interprovincial/interterritorial travel discouraged throughout much of the pandemic in Canada, and some jurisdictions such as BC and Ontario asking people to not leave their home region, it is not surprising respondents noted a reluctance to travel for sport. 34% indicate they would strongly or somewhat agree that they feel comfortable traveling to communities close to them, and it only drops for places further afield. What is interesting, is the wide gap in positive interest they show to welcoming visitors from nearby communities, their province/territory, and even, to a lesser degree, from across Canada. Whether it's due to a lesser ability to control the environment when traveling, or a recognition of the importance of safely inviting visitors to stimulate business activity in their home community, it's clear for now that people are slightly more interested in welcoming visitors to their communities.

Agreement with traveling for sport events vs. welcoming visitors to own community for sport events



Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Money Spent on Sports

Professional or major amateur sporting events are a significant component of Canada's sport tourism scene. The average respondent spends \$760 annually, while 65% of Canadians spend under \$500 to attend events. This spending varies by age group and can include tickets as well as accommodation, travel expenses, and meals if away from home.

Professional and major attracted events that Canada hosts so well, do play a major role in the sport tourism landscape, but participatory sport play a significant role as well with the average Canadian household spending \$907 each year to play and compete. Again, this can include all related travel expenses, equipment purchase, but also registration or tournament fees which form a sizeable portion of annual revenue for event rights holders. Provincial/territorial and national sport organizations, as well as other sport groups, rely heavily on these events to fund their organizations. The pandemic has largely taken this away causing major operational challenges for sport operators, as noted in the domestic report in this Bouncing Back series.

Money Spent Attending Event or Participating in Sport

Attend Sporting Events *

Total	Age 18-34	Age 35-54	Age 55+
\$760	\$595	\$922	\$650

Participate in Sports *

Total	Age 18-34	Age 35-54	Age 55+
\$907	\$843	\$1,139	\$624

* Average annual spending

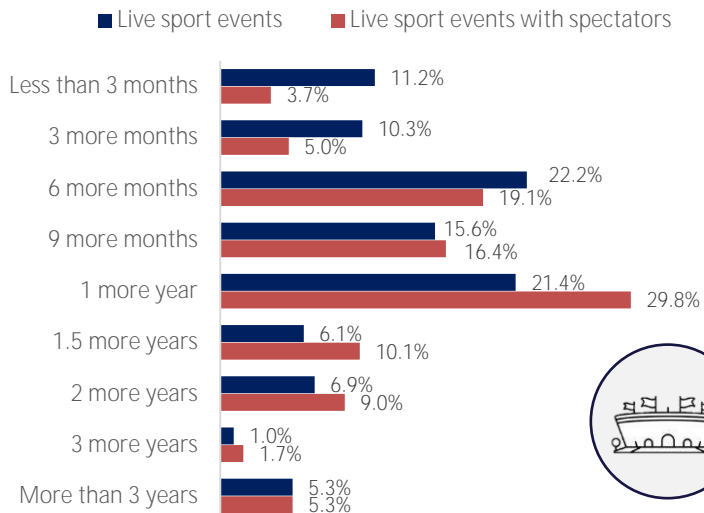


Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

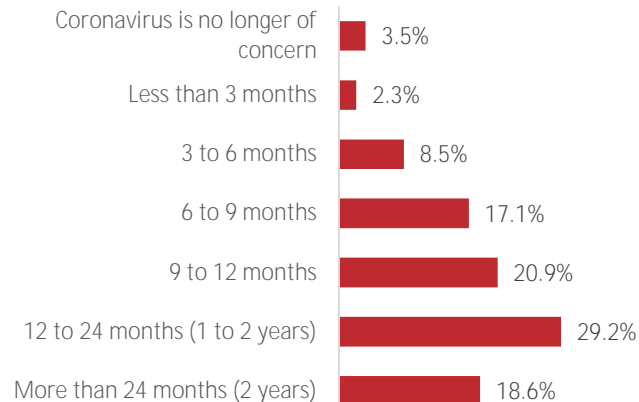
Anticipated Timeline

Wider vaccination and dropping case counts provide hope to Canadians that the pandemic may be waning. Many feel though that sporting events with spectators are a ways off with 56% **saying it's at minimum a year away**. Bright lights in this discussion come from the Montréal Canadiens that have welcomed back some fans in for their 2021 Stanley Cup playoff run, while the Canadian Football League, Canadian Elite Basketball League, and Canadian Premier League expect some fans starting in the summer 2021. Uncertainty about fans at games is mirrored by the expectation of COVID as a health concern for the foreseeable future, with the 29% majority feeling it will be with us for 1 to 2 more years.

How much longer do you anticipate until the return of...



How long until the Coronavirus health issue ends / is no longer of serious concern?



Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Return to Live Events

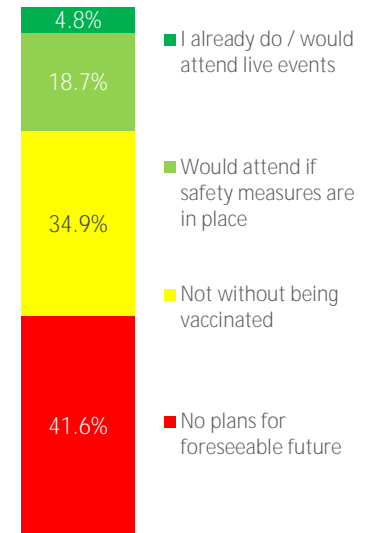
Vaccines are positioned as the key to fully open back up, but, somewhat surprisingly, for some people they are not enough to feel comfortable returning to normal activity. **42% say in the foreseeable future they don't plan to return to events like sports or festivals.** 35% do, however, see vaccines as a turning point for them to return to events. Needles in arms are helping provinces and territories plan their reopening strategies, and while broad inoculation will absolutely be a kickstart to the sport tourism industry, it may still take time for many to overcome their own barriers to feel comfortable partaking in and traveling for sport.

The one essential thing identified for people to return to live events is vaccines. 47% of respondents say being vaccinated as a requirement to attend is crucial for them to want to sit in the stands. Clear public health guidelines and decreased attendance were well back at 9% and 8% respectively. Considering the importance placed since the start of the pandemic on vaccines, it is maybe a bit surprising this figure isn't higher than 47%.

The one thing absolutely necessary for you to return to live events:



When do you plan to physically return to live events such as festivals and sporting events?

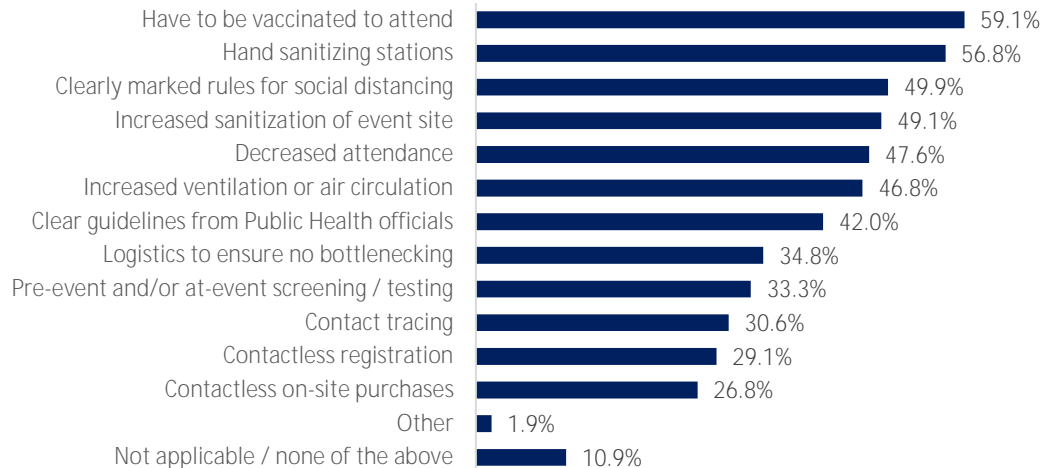


Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Return to Live Events

To get spectators back to live events will not only take logistical leaps but also psychological ones, as people wrestle with their own comfort levels for returning to large, indoor gatherings. Vaccinations are understandably at the top of the list, followed by hand sanitizing stations. Ventilation and appropriate air circulation is also relatively high, which connects with what public health officials have been suggesting is important to limit to COVID's spread. However, though hand sanitizing is highly ranked, other contact free tools, such as no-touch purchases, are lower as are controls on bottlenecking which can minimize physical distancing. As COVID's ability to spread has been better understood, public health messages have worked to keep up, but the public's understanding of what can best keep them safe perhaps hasn't.

Health & Safety Measures Most Important for Attending Live Events



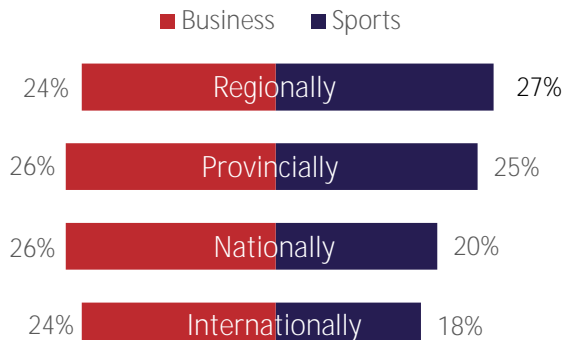
Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Travel Drivers

Business travel may be impacted for years to come as organizations manage costs and take advantage of the proliferation of online meeting tools. For individuals there often exists less control over travel for business than leisure, which can explain the higher likelihood for national and international business travel at this time. As sport returns, those national and international numbers are likely to rise.

For the sport travel people are doing, kids are a major driver, especially regionally and nationally. This is the quieter value of sport tourism. The focus is often on major attracted or professional events, yet youth and recreational sport travel provides significant economic impact to communities across Canada.

More Likely to Travel For...



Where have you traveled to for each of the following sports-related events in the past 5 years?

Travel Type & Distance	Within Home Province / Territory	Another Province / Territory	USA	Other International	None of these
Chaperoning child(ren) to participate in sporting event	70%	17%	8%	2%	19%
Participating in sporting event	56%	12%	5%	2%	35%
Attending a professional sports game or event	59%	14%	14%	4%	28%
Attending an amateur sports game or event	53%	10%	4%	2%	38%
On vacation including sports participation / attendance	33%	14%	14%	7%	47%

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Sport Related Travel

As Canadians emerge from the pandemic, it is clear there is an appetite to travel. That travel will remain primarily close to home as 78% indicate they will take a vacation in their home province or territory, while 46% feel comfortable heading on a trip outside of the country.

It's important to note this overall interest in leisure travel as it helps paint a positive story for sport travel with 65% looking to attend a sporting event, tournament or game within their home province or territory. 38% feel they'll attend an event and 35% say they'll be taking a child to play or compete somewhere else in Canada. For the sport tourism industry, this reflects an important restart to travel for sport.

As youth and adult sport and leagues start up, that will mean tournaments and away from home competitions will too. Money will be spent on accommodation, meals, and entertainment in other communities, supporting businesses and creating needed economic activity. Stories will be shared of trips to play or watch and as those filter through the population, more and more people and families will feel confident traveling for sport.

Looking ahead (beyond September 2021), how likely are you to travel to each of the following areas in order to...

	Within home province/territory	To another province/territory	To another country
Attend Sporting Event / Tournament / Game	65%	38%	27%
Participate in or Chaperone Child to a Sporting Event	53%	35%	23%
Go On Vacation	78%	54%	46%

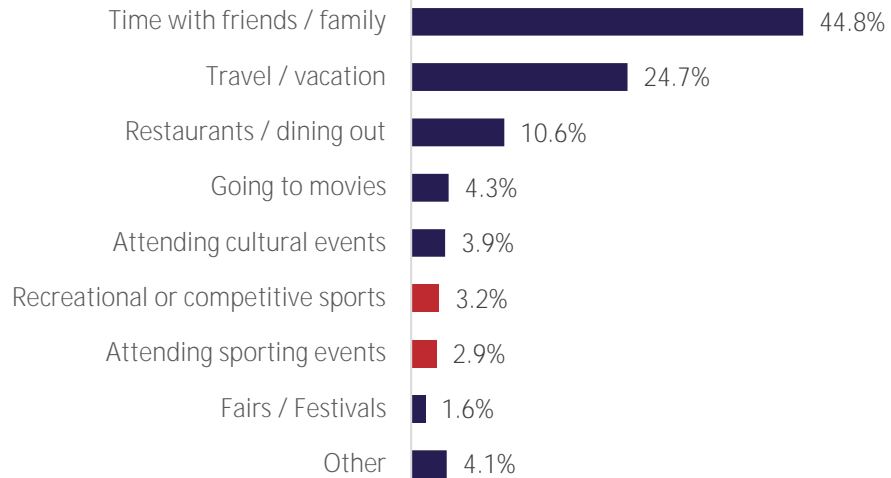
(Percentage of respondents saying 'definitely or probably will')

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Yearning for Normalcy

Understandably, people have most missed time with friends and family throughout COVID-19. This was easily the most chosen answer, with vacation time well back as the second most selected. Sport, recreational or attending events, was lower but it's important to remember that as restrictions lift and events are possible again, significant amounts of time spent with friends and family will include sport and travel. This might be visiting friends in another city to attend a game or being able to build in some family time around a kid's tournament.

What have you missed MOST due to restrictions caused by the pandemic?



Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Bouncing Back: The Way Forward

People across Canada and around the world have been through a lot since the middle of March 2020 and the declaration of the global pandemic. In that time people have become ill, some have unfortunately passed away, jobs and businesses have been lost, and people's normal course of activities has been seriously altered. This data demonstrates the actual effects on Canadians and outlines the potential future impacts as each individual contemplates what a return to normal might look like for them.

What can the sport community (national, provincial, territorial sport organizations, host cities and jurisdictions, suppliers, private event rights holders, etc.), take from this data on the Canadian public to plan for a positive future of sport participation and sport events?

1 Listen to Public Health

2 Listen to your Audience

3 Manage Costs

4 Friends & Family Time

5 Think Regional

6 Early Adopters

Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 3: Consumer)

Bouncing Back: The Way Forward

1

Listen to Public Health

This likely goes without saying, but as provinces and territories move to fewer restrictions, it will be important for all involved in sport to understand what remains required that could impact their events.

2

Listen to Your Audience

There is pent up demand to get out, play, compete, and watch events. That said, there are some that will still be unsure and cautious about how they return. Make sure to listen to them, understand and accommodate their needs as much as possible to slowly ease everyone back into normalcy.

3

Manage Costs

It feels like everyone wants to get back participating in and watching sport, but when push comes to shove, will people act as they say? Definitely look to plan events, but understand how much your athletes or customers will want to invest over the next year and plan your event schedule accordingly.

4

Friends & Family Time

Position your events as opportunities to spend time with family and friends. Respondents have indicated this is their priority so provide them a reason to take part in an event together or to have an outing at a game or competition.

5

Think Regional

The return to travel for sport will likely start regionally with people more willing to travel shorter distances. As possible, plan and host events that encourage this regional travel as a steppingstone to people becoming comfortable ultimately moving more freely about the country.

6

Early Adopters

In technology, innovators and early adopters are often talked about as those waiting in line to purchase the latest gadget. The same theory will apply to travel as some will be ready to hop on the first flight they can. Some, however, will take time so sharing the positive stories of these early adopters and innovators may prompt the next group, the early majority, to feel comfortable packing their suitcases.



Introduction & Background

Introduction / Background

COVID-19, a viral respiratory illness, was identified in December 2019 and the first case in Canada was diagnosed on January 27, 2020. The World Health Organization (WHO) declared the coronavirus outbreak a global pandemic on March 11, 2020.

Based on the advice of public health experts, public gatherings such as sport events were quickly cancelled across Canada, with numerous countries globally also making similar decisions. International travel all but shut down and the movement of citizens domestically was significantly reduced. The result was a "freeze" or postponement of all sport events at the local, provincial, national level. Communities scrambled to halt both recreational and competitive activities and events. Venues closed and businesses supporting the event industry struggled to maintain operations. The sport tourism economy came to a complete standstill.

By October 2020, while some sport activity attempted to return with modified formats, there was no definitive timeline or process for "return to sport" or "return to competition" with spectators. Even attempting to host sport events without spectators would require significant support and buy-in from everyone involved with sport hosting and event operations. Significant cost and effort would also be required to ensure that sport tourism activities could be staged safely during the pandemic and according to public health orders. Events including sport competitions, tournaments, training and evaluation camps, clinics, sport-related business meetings, and festivals were all affected. A collaborative, purposeful and demonstrably effective approach would be required to encourage host cities, venues, event organizers and participants to engage in sport events.

Sport events at the local, provincial, national and international levels have been disrupted since March 2020, and given the current case numbers, vaccination rates and emergence of more contagious variants to the virus, there is no clear timing for the full return of sport events and the associated domestic and / or international visitors that drive this important export segment of the visitor economy. Sport tourism, as of 2018, was a \$6.8 billion annual industry in Canada and contributed to the local economies through direct spending, employment, wages and salaries, and tax revenue in all regions of Canada. The goal of the Canadian sport tourism community is to once again contribute to a sustainable economic, social / cultural recovery for communities of all sizes across all Canadian provinces and territories.



Introduction / Background (cont'd)

Sport Tourism Canada established the COVID-19 Sport Tourism Recovery Task Force in May 2020 under the tagline “Bouncing Back”. The Task Force was representative of national and multi-sport organizations, host cities and destination marketing organizations, host venues, accommodation partners, industry leaders, and those who are engaged in the development of bidding and hosting strategy, planning and delivery of major sport events in Canada.

The Task Force was mandated to explore two primary challenges facing the industry:

1. To return to sport event hosting in Canada, host destinations, rights holders, venues and the sport hosting supply chain will require unprecedented levels of support and access to shared resources to support recovery efforts. An adaptable approach to event planning and risk mitigation in response to everchanging local and provincial circumstances can serve to create a positive event experience for participants, officials and spectators, while rebuilding the confidence of all Canadians to attend sport events permitted within local and provincial guidelines; and
2. The impact of the disruption to the Canadian sport tourism industry due to COVID-19 is not well understood. A more focused research and advocacy effort on the part of Sport Tourism Canada aims to highlight the importance sport event hosting plays in sustainable economic and social recovery of our communities across Canada.

The playbook for hosting sport events of any size is no longer applicable due to the global pandemic. Rights holders, host organizations, venues and suppliers to events require additional knowledge and capacity to be nimbler and make better, more informed decisions. The hope is that as the knowledge evolves about COVID-19 and the federal / provincial / regional authorities respond, that this research and any subsequent tools and resources will support the sport tourism industry to pivot to adapt and eventually bounce back.



Introduction / Background (cont'd)

Sport event hosting in a COVID-19 environment has altered how events need to be planned for and executed. Some key changes required from the sport hosting community include:

- Diversifying revenue and exploring new sources of revenue including:
 - Public funding and grants for bidding and hosting success;
 - Ticket revenue based on limited capacity and seating;
 - The creation and monetization of video content and other digital assets;
 - For larger sports properties, innovation in media rights packaging and distribution; and,
 - Sponsor revenue with fewer business-to-business (e.g. corporate hosting) and business-to-consumer opportunities (e.g. experiential, activation, sampling, etc.).
- Managing increasing event expenses based on new realities of COVID-19 protocol and facility / event operating standards.
- Developing new event operational protocol that meet public health guidelines and requirements.
- Proactively managing health and safety, financial, operating, legal and reputational risks in collaboration with all parties.
- Creating positive sport event experiences for participants, officials and spectators that meet local, provincial, and federal standards and guidelines.
- Co-designing solutions, tools and resources with industry partners for all aspects of event hosting.
- Communicating to rebuild visitor confidence and trust in participating in, spectating and / or hosting sport events.

Every aspect of the sport hosting experience needs to be carefully thought through and meticulously planned in collaboration and in unison with all industry partners in the sport event ecosystem. A successful reboot of the industry demands it.



Introduction / Background (cont'd)

Over the mid- to long-term, sport tourism can be reimagined to not only withstand the impacts of COVID-19, but ultimately adapt, rebound and thrive in a post-pandemic environment. Sport hosting has always been a key revenue generator for sport organizations and host communities across Canada, engendering economic activity in several key sectors such as accommodations, restaurants, retail, attractions and transportation.

Over the past year, the impacts of the pandemic on the Canadian sport tourism industry have not been thoroughly explored. Sport tourism is a relatively new segment of the tourism industry, having been formalized in Canada with the establishment of Sport Tourism Canada (formerly Canadian Sport Tourism Alliance) in 2000. Since that time, sport tourism has been recognized as a key contributor to economic recovery, particularly in travel and tourism following major global events and crises. From 9/11 to SARS, sport events have helped to sustain travel and tourism and to instill confidence in **an adapted “new normal”**.

In the case of COVID-19, sport tourism is poised to help reboot local economies across Canada – during- and post-pandemic. Participating in or attending sporting events is part of the fabric of this nation, and provided we can create safe event experiences, sport events will be central to restoring confidence in travel and tourism. We all have a role to play in safely re-engaging in sport events, as sport and recreation are central to the health and well-being of our families and our communities.

Sport tourism has traditionally been under-funded, under-leveraged, and in some cases, taken for granted for the contributions to local economies, community well-being, civic pride, investment in local infrastructure, and local sport development. A clear opportunity exists to tell the sport tourism story more proactively and consistently to ensure the segment continues to contribute to the recovery of sport, communities, and economies of all sizes across Canada and grow sustainably for years to come.





Project Overview & Objectives

This project is designed to provide meaningful insights that are actionable at all levels of the sport event ecosystem in Canada, so that as an industry and as a nation we may rebound faster.

The three major objectives for this project are:

1. Provide meaningful, actionable insights into the current state of sport hosting and sport tourism in Canada.
2. Enable the return of sport event hosting and to restart local economies through sport tourism.
3. Provide information and insights that will restore the confidence of participants, officials, spectators and communities in sport event hosting (including attending and travelling to sport events).



“Part 3: Consumers” focused on sport fans, sport participants, and parents of sport participants from across Canada.

This research study is divided into three distinct activities and sets of reports:

1. Sport hosting for domestic events / audiences > Research and insights focused on local, regional, and national sport events.
2. Sport hosting for international events / audiences > Research and insights focused on international sport events.
3. Consumer sentiment regarding sport event attendance and participation during- and post-pandemic.

During this third phase “Consumer sentiment for sport event attendance and participation”, research was conducted as follows:

- Primary research through an online survey deployed in both English and French to a nationally representative sample of Canadians with quotas built in to ensure opinions from sport fans, sport event attendees, and sport event participants.
- Comparative research compiled from various national studies with a similar focus or applicable questions.





Sports Tourism

Why is it important
to Canada?

Sport Tourism in Canada

Sport tourism is defined by Sport Tourism Canada as “any activity in which people are attracted to a particular location as a sport event participant, coach, official, or event spectator, or are attending sport attractions or business meetings.” This definition can be further enhanced with the addition of sport development clinics (e.g., player, coach, volunteer, or official), as well as training and evaluation camps. All of these sport-related events attract visitors.

Sport tourism in Canada is a \$6.8 billion (CAD) annual industry and, at its core, is a grassroots economic development initiative. Beyond the economics, sport tourism and the staging of sport events can also support the social and sustainability impacts that can be delivered in a community.

The spending profile of the sport tourism visitor in Canada is significant, with an average spend per Canadian visitor of \$145.09 for same day visitors and \$546.56 for overnight visitors. The average spend per sport tourism visit in Canada is \$301.56. The average spend for a U.S.-based visitor is \$775.26, while overseas visitors spend an average of \$2,033.01 per stay.

Sport tourism can build business, build community, and develop local sport. It can also positively impact several of the United Nations Sustainable Development Goals (SDGs). For sport tourism to be truly strategic during- and post-pandemic, it must be planned, delivered, and evaluated in line with planned legacies, utilizing a consistent and repeatable approach.



Sport Tourism Customer Profile

Primary

The primary customer group for sport events makes direct decisions on or influences the location of sport and sport business events that define a host city's success. That includes, but is not limited to:

- Provincial, territorial, national and multi-sport organizations that conduct competitions and championships;
- Private event rights holders who own existing event properties or have the capacity to create new events;
- Professional sport, including major and minor professional leagues and teams; and,
- Local organizers, either for-profit or not-for-profit, who plan and deliver one-time or annual events.

Secondary

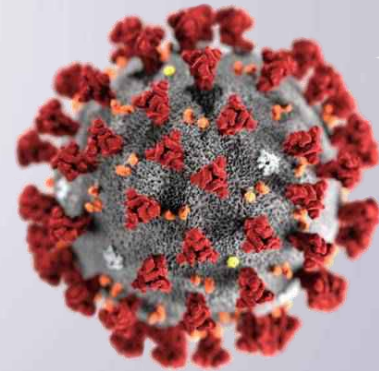
The second group of customers who impact the success of sport events, as a result of making decisions to travel to a destination and experience the historical, cultural, culinary and other attractions that are offered within the host city, includes:

- Event participants (athletes, coaches, officials, support staff, volunteers, etc.)
- Spectators
- Media, VIPs, and sponsors
- Friends and family of athletes or participants



COVID-19

Information & Timeline



COVID-19 – Introduction

The coronavirus pandemic caught the entire world off-guard. Emerging from a city in central China in December 2020 as a “mysterious viral pneumonia of unknown origin” (BBC, January 9 2020), the coronavirus has spread globally and now affects nearly every country on Earth. While novel coronaviruses are not new (e.g., SARS), never have we seen cities mobilize so quickly to shut down, restrict travel and contain any further outbreak.

By the end of January 2020, more than 100 people had died, and the virus had been detected in at least 16 countries. A week following, more than 100 people had died in a single day. Alarm bells were sounding and global officials were on alert. Unaware of its varying and potentially fatal effects on people of all ages, governments around the world attempted to monitor and assess, with the occasional public health measure or intervention to help curb infection rates. On March 11, 2020, it became clear that efforts globally had failed – coronavirus had become a global pandemic.

Travel and tourism was hit hard. As hospitals filled up, governments began taking more extreme measures, closing borders and implementing lockdown measures for citizens, preventing or at least curbing inter-regional domestic travel. Traveller confidence plummeted and the world came to a veritable standstill.

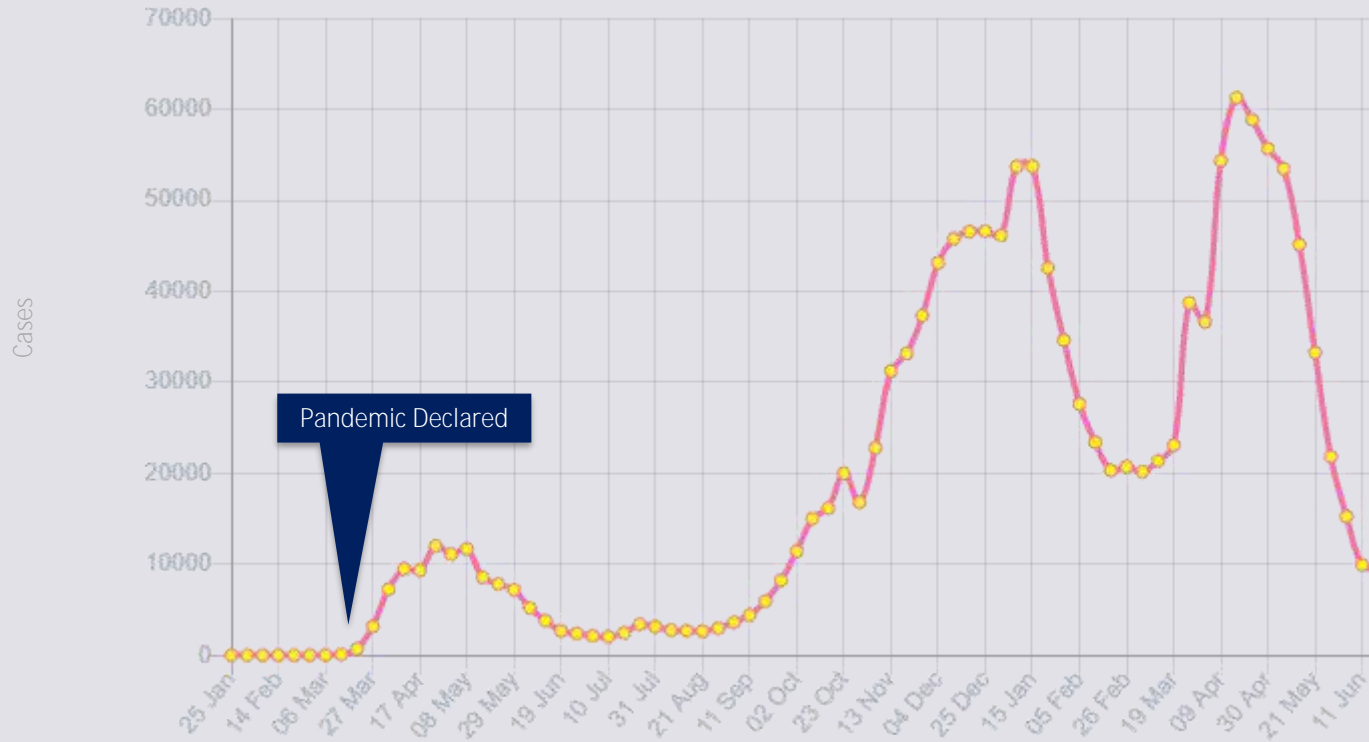
In December 2020, the United Nations World Tourism Organization (UNWTO) estimated that tourism declined more than 70% over the course of 2020, taking the industry back to levels from 30 years ago (UNWTO, December 2020). The industry attempted a number of restarts – many of which were unsuccessful. Public health orders were inconsistent, traveller sentiment varied by region, and no one seemed to have a clear playbook for “what comes next”.

After a year of shutdown and continuing questions as to when the end will arrive, the industry can no longer afford to wait. Stakeholders are working together to come up with innovative solutions to help the industry adapt, while keeping aware of immunization schedules, coronavirus variants or public policy. This study is an important piece of the puzzle, helping correlate domestic sport event hosting and consumer sentiment, to see events take place safely enabling the return of spectators and participants to sport.



COVID-19 – Timeline (Cases in Canada)

Canada: 7-Day Tracker



Research Results

Canadians

- General Public
- Sport Fans
- Sport Participants
- Sport Parents



Profile

REPRESENTATIVE DISTRIBUTION OF RESPONSES » A nationally representative sample (age, gender, place of residence, etc.) was utilized for this study with quotas built in to ensure opinions from sport fans, sport event attendees, and sport event participants. The only deviation from this is the fact Quebec is slightly under-represented as its share of national population and Ontario is slightly over-represented.

LITTLE TO NO DIFFERENCE BY SEGMENTS OF THE POPULATION » Results presented herein are representative of the entire sample and little to no significant differences were found when broken down by age, gender, or place of residence (except where noted or broken down within the report).

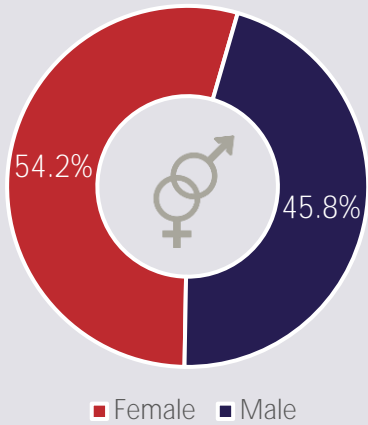
VACCINATION RATES INCREASING » After a perceived slow start to vaccination, Canada has rapidly caught up in terms of first doses, ranking in the global top 10 for countries whose population has at least one dose. However, Canada's population that is fully vaccinated only sits at 8%, which puts it well behind countries such as the United States (42%), the United Kingdom (41%), and Israel (59%) (as of June 7, 2021 – [Our World in Data](#)).

RATES FOR OPENING » The 2nd dose magic number appears to be 20% of Canadians to encourage broader loosening of restrictions. Though provincial and territorial reopening plans vary, having citizens over 70% with at least one dose and 20% fully vaccinated will see public health officials more comfortable with a return closer to normal.

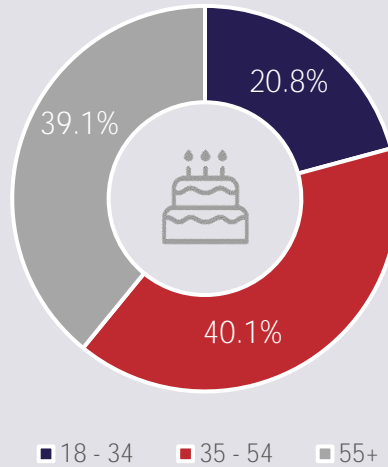


Profile - Demographics

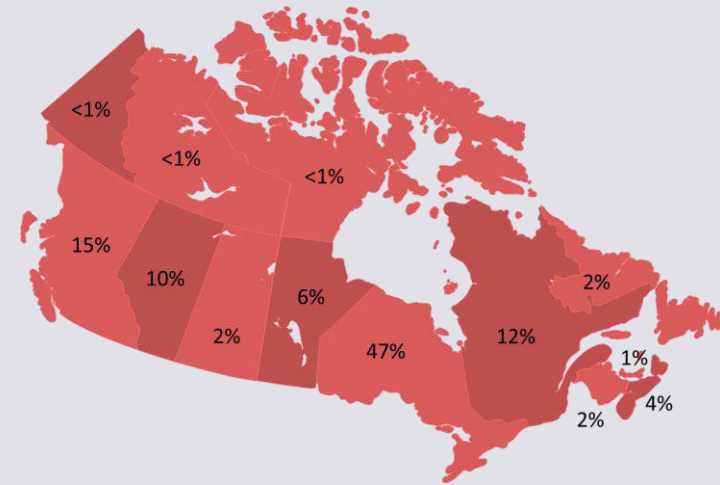
Gender



Age Range

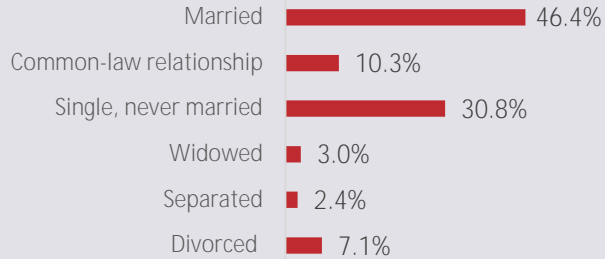


Place of Residence



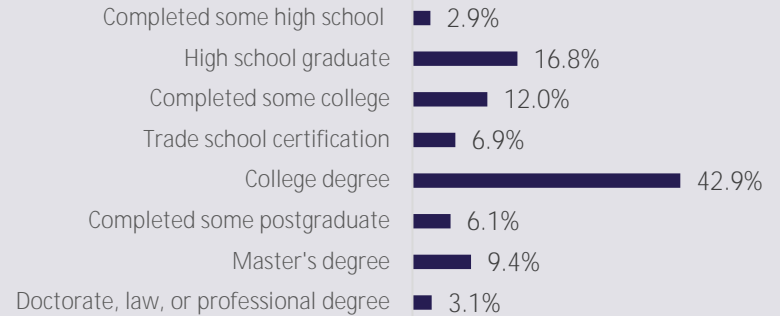
Profile - Demographics

Marital Status

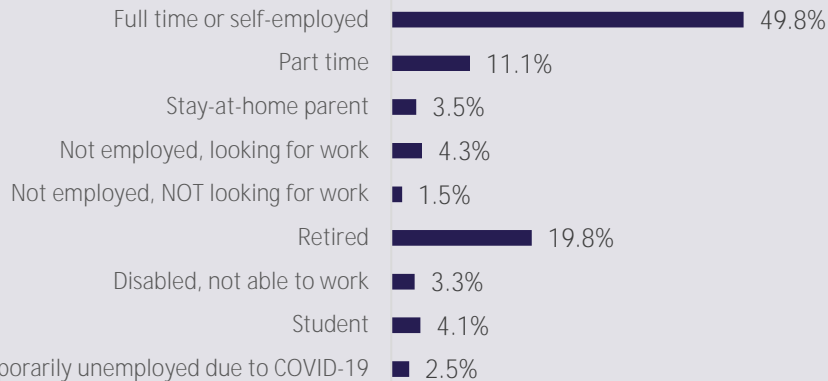


26% have children at home

Education Level

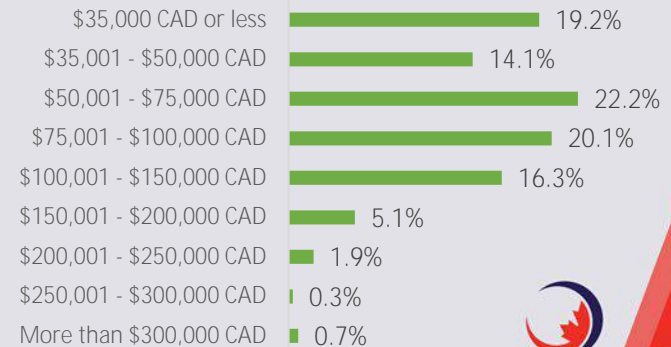


Employment Status



Average Household Income = \$80,000

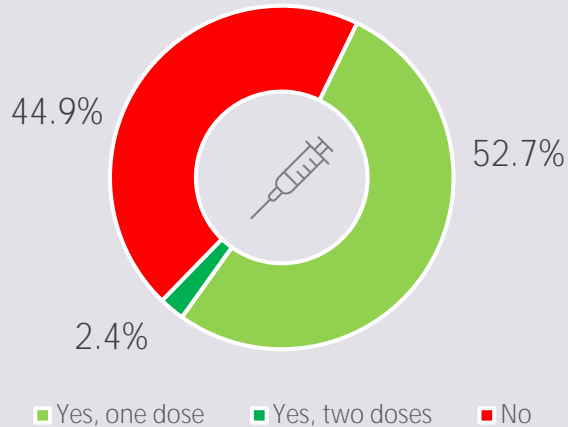
Household Income



Profile - Vaccination Coverage

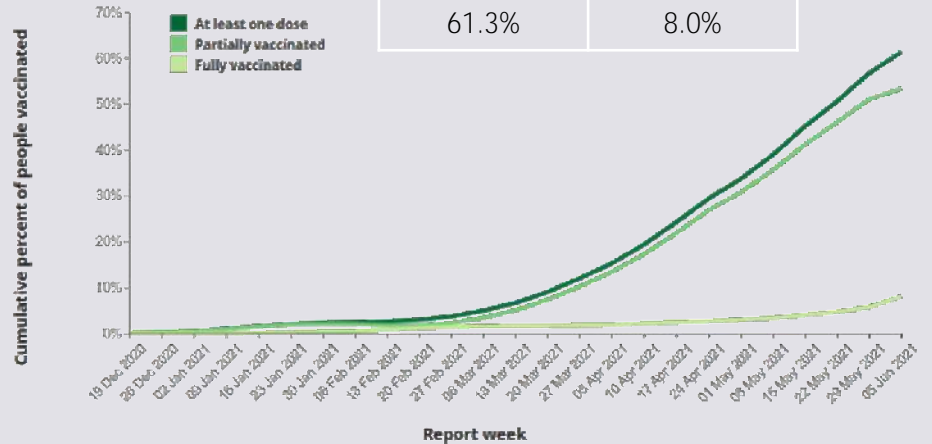
Respondents

Been Vaccinated



Canadian Vaccination Rates (total population) as of June 5, 2021

One Dose	Two Doses
61.3%	8.0%



Canada has rapidly caught up to other countries around the world on the delivery of first doses. Now, to further support reopening, second dose figures will have to rise to better enable border re-openings and reduced activity restrictions.



* Source: Government of Canada (Public Health Agency of Canada) as of June 5, 2021

Pre-Pandemic Activities

CLOSE TO HOME » Even prior to the pandemic, respondents stayed relatively close to home for their involvement in sport, whether participating or spectating. This can still have a positive impact on sport tourism as people move about their region spending money on hotels, restaurants and entertainment in other communities.

KIDS ARE ALRIGHT » No matter how far people were traveling, the chaperoning of kids to participate in their events is the leading driver of sport travel. As youth sport has been severely curtailed in Canada throughout the pandemic, allowing only limited training and activity, the tournaments and events that normally provide economic impact in communities have disappeared. While the large **national and international events get the coverage**, it's the vast number of youth events in all parts of Canada that provide a strong foundation for the sport tourism sector.

PEOPLE WANT TO PLAY » The average annual household spend by those participating in sport is \$907 while the amount personally spent on attending sporting events is \$760. In attending sporting events, 48% of respondents spend \$250 or less, while 15% spend more than \$1,000 on an annual basis. Some of these dollars would presumably be spent in the local market and not part of travel (e.g. registration fees, equipment purchase, etc.). There is clearly value both in sport participation and event attendance but this data helps demonstrate the value of a mixed portfolio for host cities between spectator driven events and participatory ones.

DRAW OF PROFESSIONALS » Professional events is a significant driver of sport travel as 29% of respondents indicate they will go to other parts of Canada for events, while 14% note they will visit the United States for a professional event. While professional teams **aren't** in every city in the country, they are an important part of the sport tourism landscape driving greater national travel than for participatory activities.



Pre-Pandemic Activities

Prior to COVID, which of these activities or events did you / do you participate in or attend?



Many of the activities listed here are everyday activities combined with more 'dedicated' leisure activities. In the range of leisure options available to people before the pandemic, sport in its various forms (spectating, participating, youth involvement) plays a significant role, even though they ranked lower than other options on this list.



Pre-Pandemic Activities - Sport Event Attendance / Participation

On average, which type of sporting events do you attend?

Type / Distance	Locally	Regionally	Provincially	Nationally	None
Professional sporting event	43%	20%	22%	29%	15%
High level amateur sporting event	30%	16%	12%	7%	47%
Grassroots sporting event	36%	12%	9%	4%	49%

On average, which type of sporting events do you participate in?

Type / Distance	Locally	Regionally	Provincially	Nationally	None
Recreational events	61%	17%	9%	4%	24%
League play	31%	15%	8%	5%	53%
Tournaments	28%	13%	12%	7%	55%
Championships or qualifications	21%	12%	11%	8%	61%

On average, which type of sporting events do your child(ren) participate in?

Type / Distance	Locally	Regionally	Provincially	Nationally	None
Recreational events	57%	15%	11%	3%	28%
League play	40%	16%	13%	3%	43%
Tournaments	34%	21%	16%	7%	46%
Championships or qualifications	26%	18%	16%	8%	51%

Attendance at sporting events are predominately local and regional with occasional travel for amateur and grassroots events but this jumps significantly, and includes national travel for professional events.

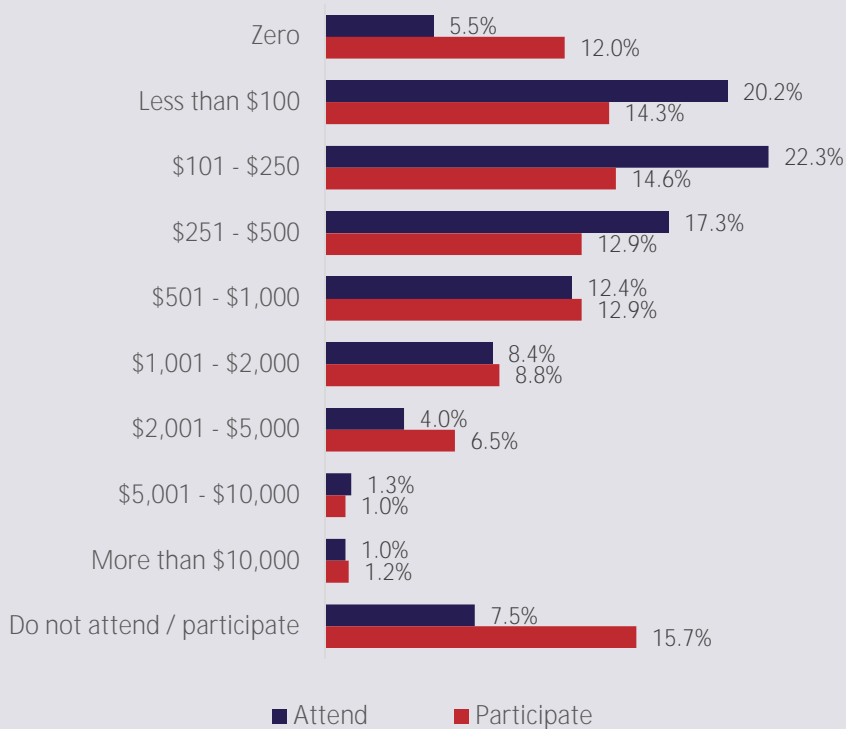
As participants progress into tournament, championship or qualifying competition, this does spark some marginal increases in travel within a province or territory or nationally.

Kids sports are larger drivers of regional, provincial/territorial, and national travel than adult participation.



Pre-Pandemic Activities - Money Spent Attending / Participating

Annual Money Spent



Attend Sporting Events *

Total	Age 18-34	Age 35-54	Age 55+
\$760	\$595	\$922	\$650

Participate in Sports *

Total	Age 18-34	Age 35-54	Age 55+
\$907	\$843	\$1,139	\$624

* Average annual spending



Pre-Pandemic Activities - Sports Related Travel

Where have you traveled to for each of the following sports-related events in the past 5 years?

Travel Type & Distance	Within Home Province / Territory	Another Province / Territory	USA	Other International	None of these
Chaperoning child(ren) to participate in sporting event	70%	17%	8%	2%	19%
Participating in sporting event	56%	12%	5%	2%	35%
Attending a professional sports game or event	59%	14%	14%	4%	28%
Attending an amateur sports game or event	53%	10%	4%	2%	38%
On vacation including sports participation / attendance	33%	14%	14%	7%	47%

Overwhelming majority of people who do travel to participate in sport, attend an event, or take kids to participate will do so within their home province or territory. There is some movement to other provinces or territories for these activities, but travel is very limited to the US or other countries.

Kids are the largest drivers of sport related travel with one noted anomaly being an uptick in numbers of people that will go to the US to watch a professional sporting event. It is very likely this is primarily driven by attendance at NFL, NBA, MLB, or other leagues and events not available or as prominent in Canada.



Health Considerations

MENTAL HEALTH SHIFTS » From respondents of all ages, there is a precipitous drop from 53% to 33% in those that indicate excellent or very good mental health from pre-pandemic to present day and a reciprocal jump from 11% to 30% in those who now indicate poor or very poor mental health. This is a troubling discovery and could form the basis of the mental health crisis that some health care experts have been predicting due to a lack of interaction, lock downs and an elimination of many regular activities.

GOOD IN THE MIDDLE » Interestingly, a relatively equal number identify having as good mental and physical health before the pandemic, as at this point, near its end. Those with good mental health increased 1.5% to 37.1% and those with good physical health dropped by 1% to 43.2%. Though it's impossible to know if it is the same respondents who have remained in the 'good' zone, it is possible to generally surmise that those who are relatively balanced and don't get too high or too low and maintain a consistent physical regimen have managed to maintain similar health levels as COVID-19 has moved along.

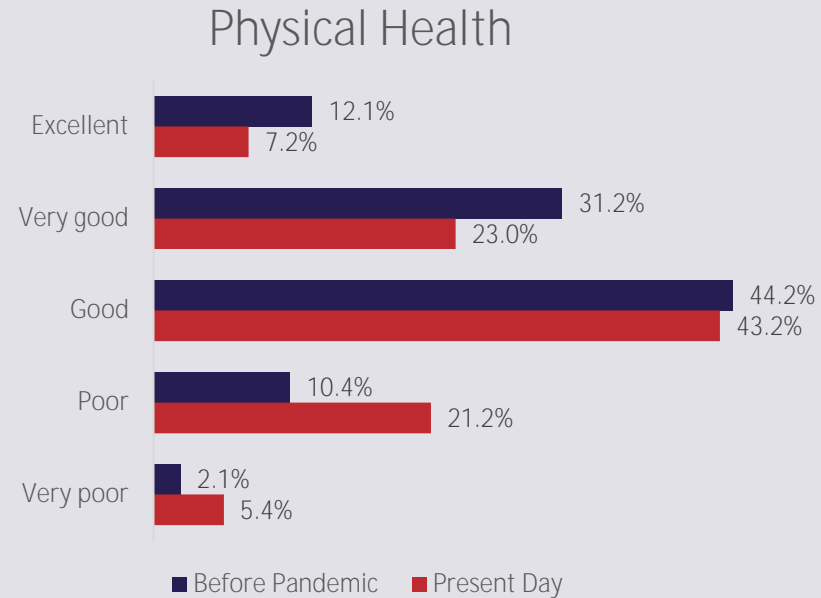
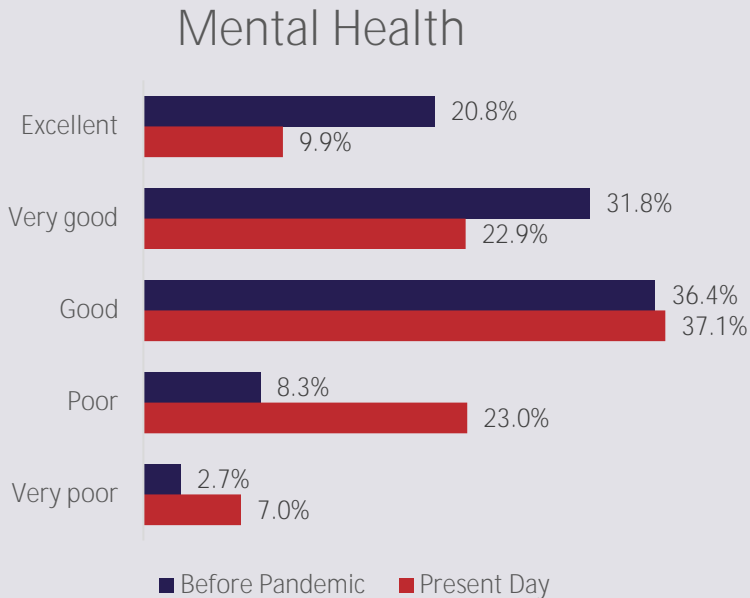
This also holds true through the three age groups. Those 18-34 who indicate good mental health dropped by just over 9%, those 35-54 note a 2% increase in good mental health and those 55+ with good mental health went up 5%.

YOUNGER CANADIANS' IMPACT ON HEALTH » The younger demographic of respondents noted lesser levels of mental health before the pandemic, which has only been made worse by COVID-19. For those 18-34, 22% indicate very poor or poor mental health pre-pandemic and present day that figure jumps to 45%, far exceeding numbers in the older two categories.

CATCHING COVID STILL CONCERNING » Even with other underlying factors considered, such as physical health, mental health, and finances, catching COVID-19 remains the largest concern for respondents. Concerns with long-COVID, uncertainty about how long vaccine protection exists, and the emergence of more contagious variants may be driving this worry.

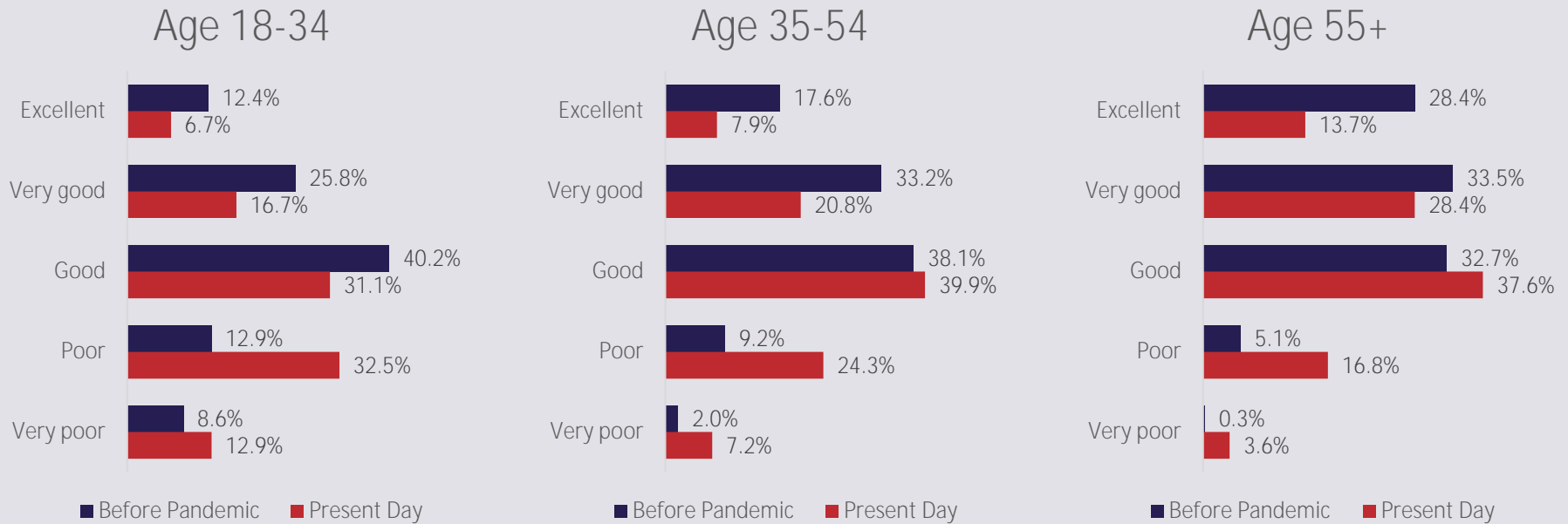


Health Considerations - Mental & Physical Health



A relatively equal number of those that identified having good mental and physical health before the pandemic, said the same after the pandemic. However, on the poles of the scale was greater variability. Those who had poor or very poor mental health prior to the pandemic jumped from 11% to 30% and from 13% to 27% for physical health. Excellent or very good mental health fell from 53% to 33% and for physical health from 43% to 30%.

Health Considerations - Mental Health – By Age Group

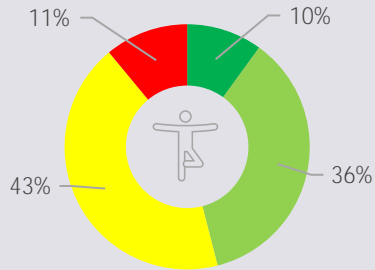


Younger members of the population appear to have seen their mental health affected more through the pandemic than the older generations. Prior to the pandemic, 22% of respondents aged 18-34 years old said they had poor or very poor mental health now that number has jumped to 45%.

Those aged 35-54 who cited poor or very poor mental health jumped from 11% to 32% and those 55+ went from 5% to 21%.

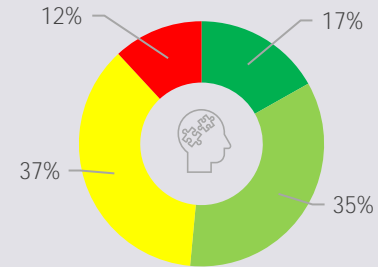
Health Considerations - Concerns

Your Physical Health



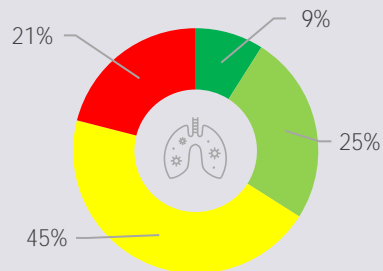
■ Not at all concerned ■ Not really concerned ■ Concerned ■ Severely concerned

Your Mental Health



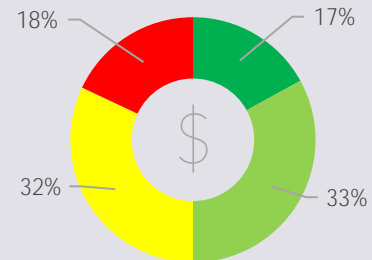
■ Not at all concerned ■ Not really concerned ■ Concerned ■ Severely concerned

Catching COVID



■ Not at all concerned ■ Not really concerned ■ Concerned ■ Severely concerned

Your Financial Situation



■ Not at all concerned ■ Not really concerned ■ Concerned ■ Severely concerned

Q. How concerned are you with the following aspects?

Health Considerations - Concerns

How concerned are you with the following aspects?

Group & Activity	Not at all concerned	Not really concerned	Concerned	Severely concerned	Top 2 Box
Your physical health	10%	36%	43%	11%	54%
Your mental health	17%	35%	37%	12%	49%
Catching COVID	9%	25%	45%	21%	66%
Your financial situation	17%	33%	32%	18%	50%



Despite the shifting concerns over physical and mental health reported on the previous slides, it is interesting to see the number of people concerned or severely concerned about catching COVID creates the most unease. This demonstrates the anxiety that still exists for the illness itself, despite the greater availability of vaccination.

Additionally, 50% of the respondents are still concerned about their financial situation as many businesses have either temporarily or permanently closed and many more have laid off staff until restrictions are either lifted or demand returns.



Handling of the Pandemic

DIFFERENT ROLES » The differing roles between public health and the three levels of government seem to have played an impact in respondents' satisfaction at how each has handled the pandemic. The more contentious issues, such as border control along with vaccine procurement and distribution, have led to lesser overall satisfaction with federal and provincial governments. Public health officials, despite often acting as the faces of restrictions and COVID information, have engendered greater levels of satisfaction with the public. All this said, even for the provincial and federal governments, they have almost equal numbers of people who are very or somewhat satisfied and dissatisfied.

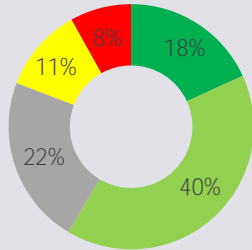
PROVINCIAL/TERRITORIAL INFLUENCE » Canadians have leaned on many sources for information throughout the pandemic though they look primarily to their provincial and territorial governments. With provinces and territories responsible for health delivery, this is logical as they would have the most direct influence on the lives of residents. They have been the ones alongside public health officials monitoring hospital capacity, providing testing, imposing or adjusting restrictions, and developing vaccination plans.

A WAYS TO GO » There is a sentiment among respondents that COVID-19 will remain a serious concern for a long time to come. 48% feel COVID will have a presence in our world for at least 12 months, Other surveys as part of this Bouncing Back series have also noted a belief that COVID will remain present for some time to come, and they too have noted long term expectations of COVID being part of our lives. What these impacts may be cover a wide range of possibilities including, but not limited to, border controls, requirement for vaccine boosters, capacity limits on certain entertainment options, and participatory sport restrictions. Ideally many of these listed concerns won't be present for long, but clearly there's a concern from citizens that COVID won't go away quietly.



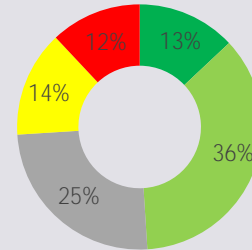
Handling of the Pandemic – Levels of Satisfaction

Public Health



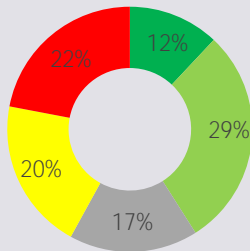
- Very satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

Local Government



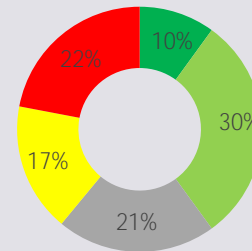
- Very satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

Provincial Government



- Very satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

Federal Government

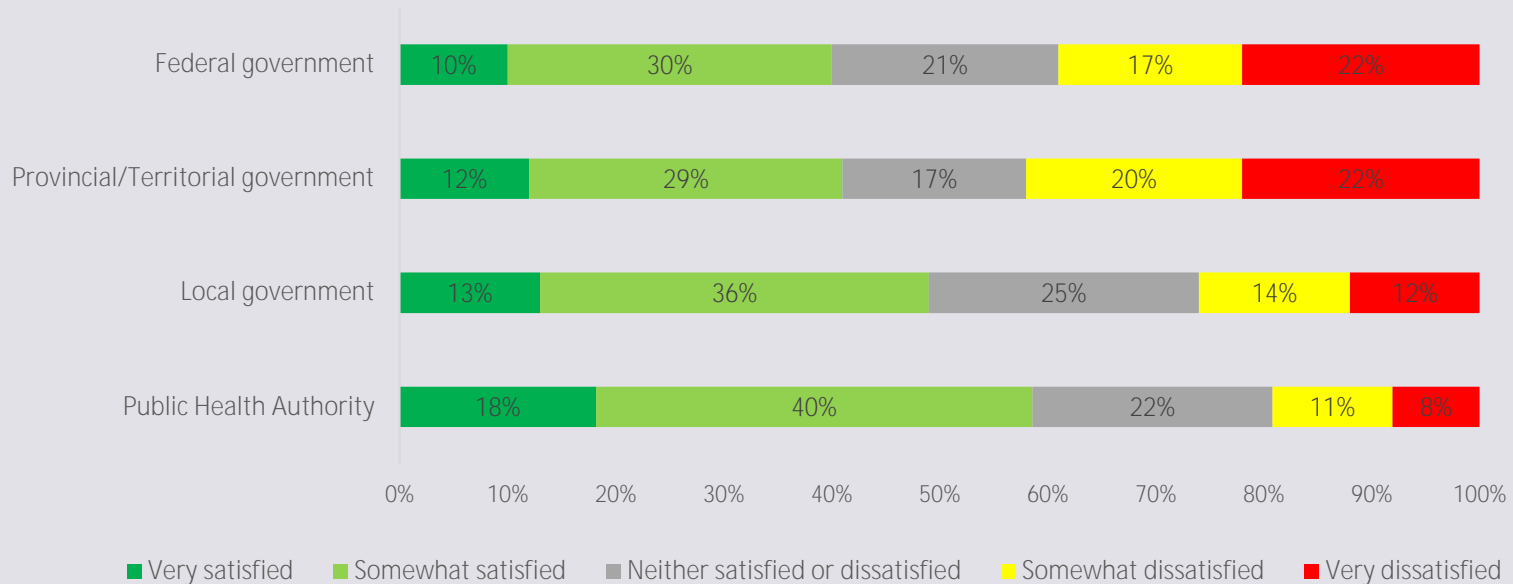


- Very satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Very dissatisfied



Handling of the Pandemic – Levels of Satisfaction

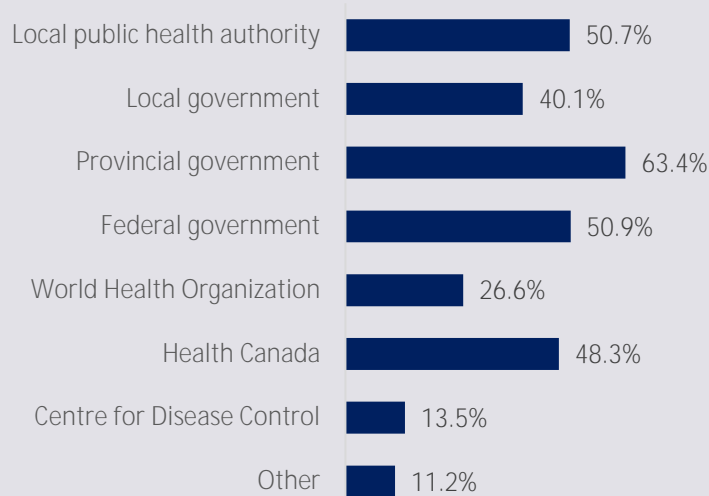
Satisfaction on Handling of Pandemic



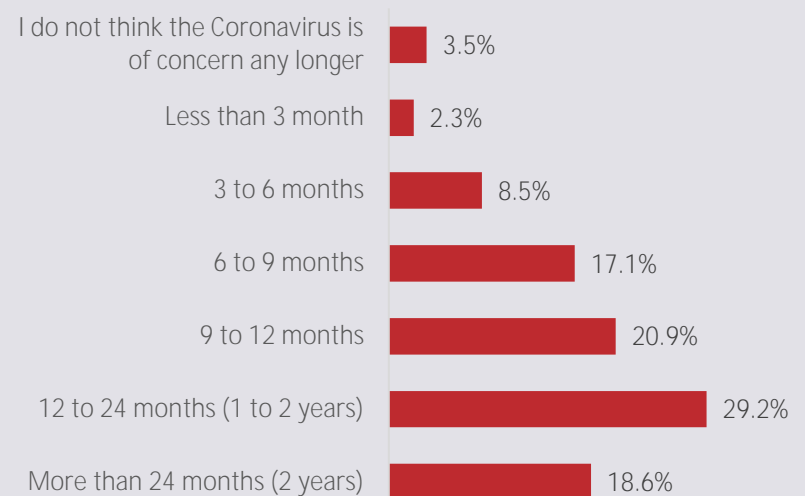
58% are somewhat or very satisfied in public health, while the lowest level of satisfaction is for federal government at 40%. When you consider the different roles played by each, and their differing levels of impact on citizens, people appear more disappointed in provincial and federal officials. Vaccine rollouts, third wave restrictions, and reopening plans, which are largely in the hands of the federal and provincial/territorial governments, likely play a role in their inconsistent satisfaction levels.

Handling of the Pandemic – Information and Timing

What sources do you utilize for information about the pandemic?



How long until the Coronavirus health issue ends / is no longer of serious concern?



28% feel that COVID will remain with us for at least 9 months with 29% saying it will be a factor for between 1 and 2 more years. The definition of what could be deemed a serious concern may vary but it's clear the length of the pandemic to date has made people leery to predict an early end to its effects.



Return to Sport and Travel

STILL EMPTY STANDS » While there has been some light shone on the subject with limited fans allowed to watch the Montreal Canadiens at the Bell Centre during the 2021 Stanley Cup Playoffs, 49% believe it will be between one and two years before fans are welcomed back in large numbers to stadiums and arenas across the country. This too has a major impact on sport event rights holders, not to mention professional teams, which rely on ticket revenue to support many of their events. Despite this gloomy picture, many provinces have noted in their summer/fall 2021 opening plans the possibility of at least some level of spectators in seats once key public health targets are hit.

HOME BODIES » There are a significant number of people that won't consider travel within their communities for a sporting event, with 67% saying they likely or very unlikely to do so. These numbers only increase for travel further away in Canada, into the United States, or internationally. These numbers are high but with it must be considered that some jurisdictions have had regional travel restrictions to minimize movement between health zones, while others have required 14-day quarantines upon return from inter-provincial travel. Additionally, some are reluctant to travel for any purpose, and anywhere, during the pandemic.

COME ON OVER » People are more willing to welcome visitors to come from within Canada for a sporting event than they are to travel for one themselves. For those who are likely or very likely to travel to or welcome people from communities near them, the willingness to travel is 34%, while the willingness to see visitors come is 42%. Similar gaps, though less pronounced, exist for visiting and welcoming visitors within a province or territory and across Canada. One possible driver of this is by traveling you could have less control over your environment and its variables, whereas at home you can choose if, and how, to take part in an event.



Return to Sport and Travel (cont.)

PLAYING HALTS » Only 9% of respondents indicate having been part of a sporting event or organized sporting activity since the advent of the pandemic. This overwhelming number demonstrates the severe level of impact on sport activity and the potential impact on the physical health of Canadians. Many have found unique ways to stay active but are clamouring for the return of recreational competition and events, which both help and support the sport tourism industry.

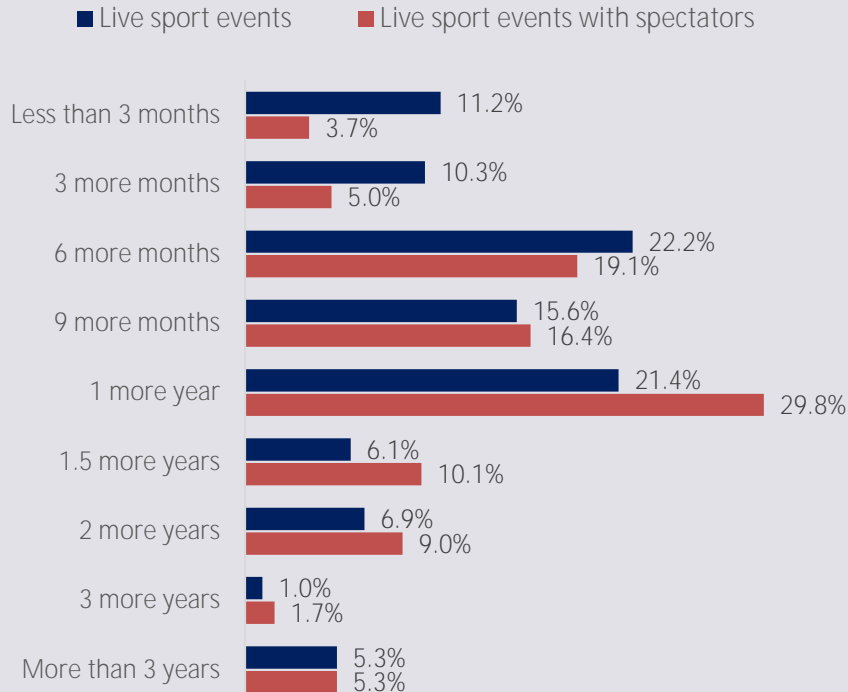
VACCINE PLUS » For responses to the question “when do you plan to physically return to live events”, 42% don't plan a return to events like festivals or sports in the foreseeable future despite ‘return when vaccinated’ being an answer choice. This speaks to the fact that a return to normal, meaning restrictions are off and numbers of fully vaccinated people are up, doesn't mean all in Canadians will quickly return to how they lived before. Innovators and early adopters, (from a traditional adoption curve), while smaller groups, will pave the way demonstrating that things are safe leading others to follow suit eventually returning to activities that have been a challenge during the pandemic.

GET BACK TO EVENTS » Multiple measures are noted to enable events to return, led by vaccinations and hand sanitizing stations. Additionally, when asked to pick one measure that would bring them back, unsurprisingly vaccines easily led the way. It is notable that people indicate surfaces and spread by touch are a concern (2nd most is hand sanitization at 56% and increased sanitization of event site 4th at 49%) yet contactless payment or entrance methods, which could reduce touch, are the two lowest options on the list. This on top of public and global health experts indicating that COVID is primarily spread through the air, as opposed to by touch. This isn't to judge people's areas of concern, but as the science has progressed in understanding COVID transmission, public perception of risks may have not entirely followed along.



Return to Sport and Travel – Anticipated Timeline for Sports

How much longer do you anticipate until the return of...



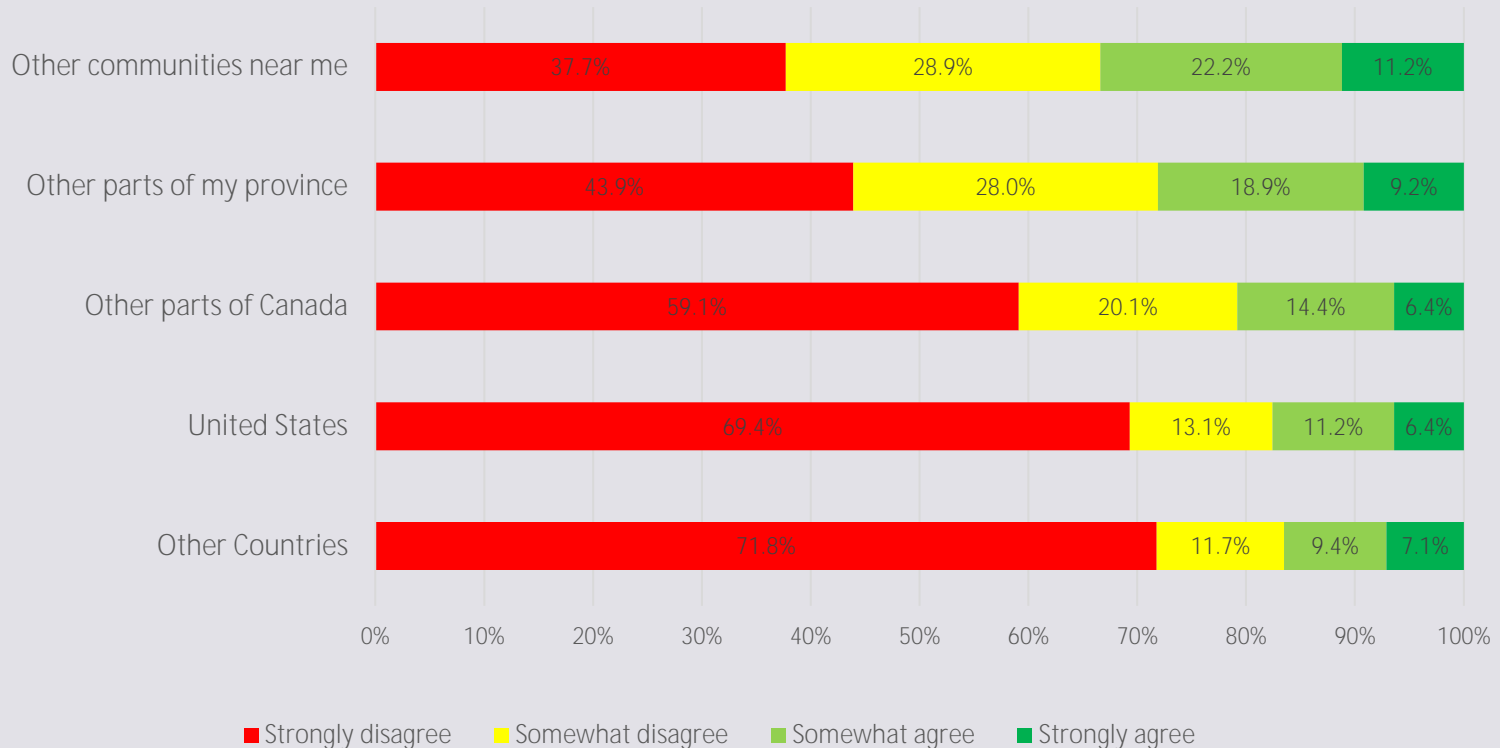
Mirroring what people feel about COVID's effects remaining with us for the next year or two, respondents also feel that a return of spectators to events is some time away. The majority, at 30%, say it'll be one more year before we see that, though the Montreal Canadiens have welcomed limited spectators for their Stanley Cup Playoff run.

There is greater optimism for the return of live sporting events (that may or may not have spectators). Of course, many live events have already been taking place, though primarily elite professional ones such as the National Hockey League or international curling.



Return to Sport and Travel – Feel Safe to Travel

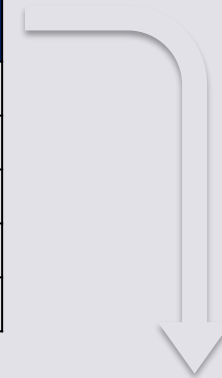
I would feel safe traveling to _____ for a sporting event



Return to Sport and Travel – Feel Safe to Travel

I feel safe traveling to _____ for a sporting event?

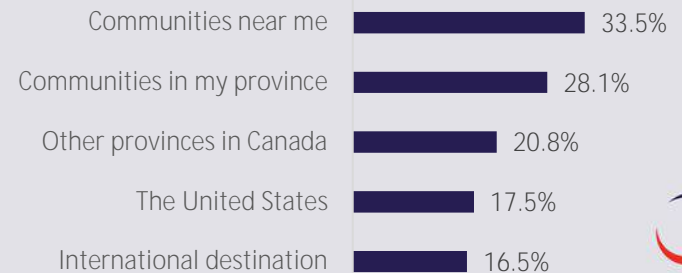
Group & Activity	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree	Top 2 Box
Communities near me	37.7%	28.9%	22.2%	11.2%	33.5%
Communities in my province	43.9%	28.0%	18.9%	9.2%	28.1%
Other provinces in Canada	59.1%	20.1%	14.4%	6.4%	20.8%
The United States	69.4%	13.1%	11.2%	6.4%	17.5%
International destination	71.8%	11.7%	9.4%	7.1%	16.5%



Of those with an interest in sport, it is very interesting to note the **number of people that won't travel, even within their communities, for a sporting event** – 67% saying they strongly or somewhat disagree.

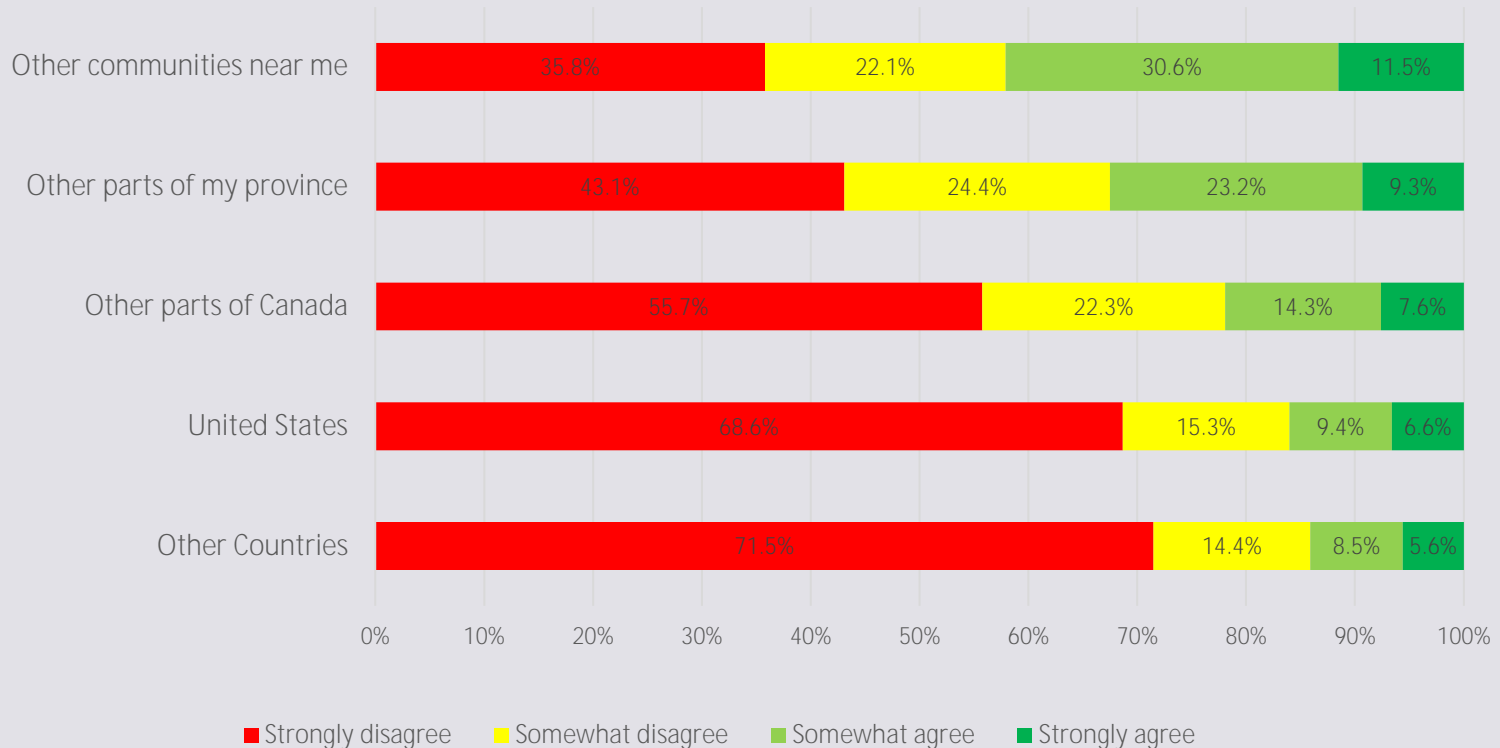
Significant numbers of people are reluctant to travel at all, and anywhere, during the pandemic, so they may be the later returnees to sport and events when they are again up and going.

Feel Safe Traveling (top 2 box)



Return to Sport and Travel – Welcoming Visitors

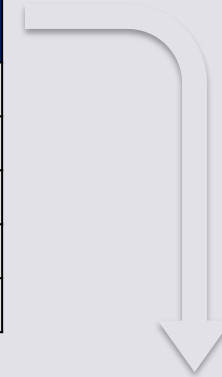
I would welcome visitors to my community traveling from _____ for a sporting event



Return to Sport and Travel – Welcoming Visitors

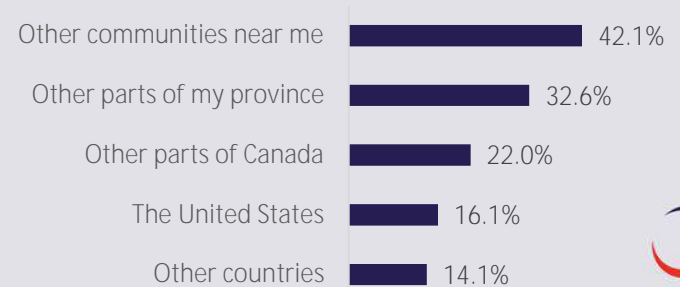
I feel comfortable welcoming visitors to my community from _____ for a sporting event?

Group & Activity	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree	Top 2 Box
Other communities near me	35.8%	22.2%	30.6%	11.5%	42.1%
Other parts of my province	43.1%	24.4%	23.2%	9.3%	32.6%
Other parts of Canada	55.7%	22.3%	14.3%	7.6%	22.0%
The United States	68.6%	15.3%	9.4%	6.6%	16.1%
Other countries	71.5%	14.4%	8.5%	5.6%	14.1%



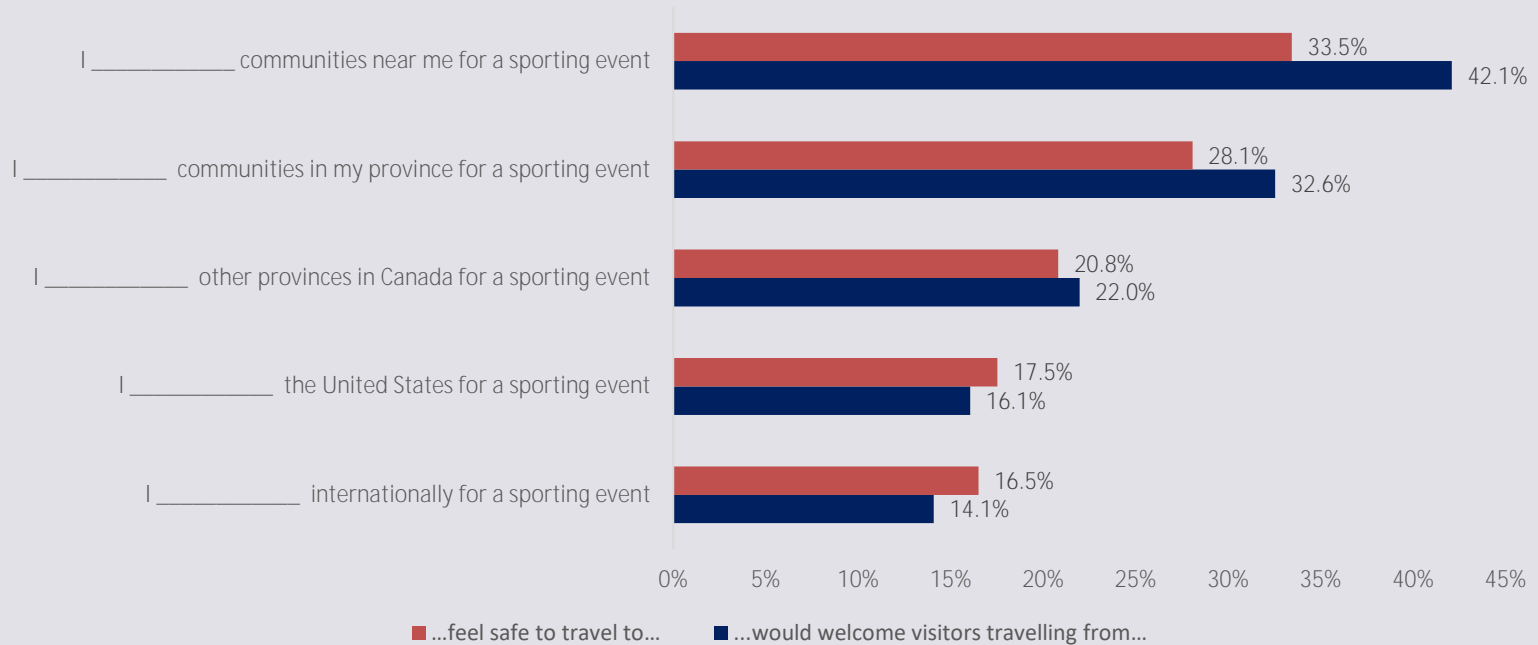
However, respondents (when asked the same questions) are more willing to invite visitors to come from within Canada. For somewhat agree and strongly agree responses, there is a large 28% gap between welcoming visitors from communities nearby and from other countries demonstrating there is a limited comfort level for people to come from outside of a province, territory or nearby communities.

Comfortable Welcoming Visitors (top 2 box)



Return to Sport and Travel – Traveling or Welcoming Visitors

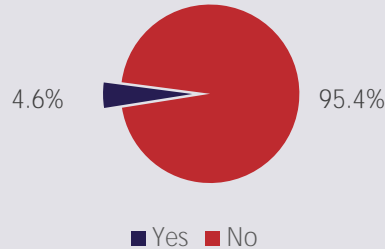
Comparison of Top 2 Box for traveling to as visitors and welcoming visitors



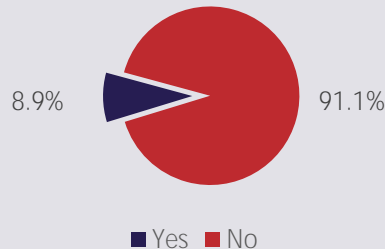
In comparing “top 2 box” responses for traveling to or welcoming visitors from other destinations, it’s interesting to note for communities nearby or within a province/territory, people are significantly more willing to welcome visitors than travel themselves.

Return to Sport and Travel – Attending Sport Events

Have you or your family attended any sporting events since the pandemic was declared?



Have you or your family participated in any sporting events or organized sporting activities since the pandemic was declared?



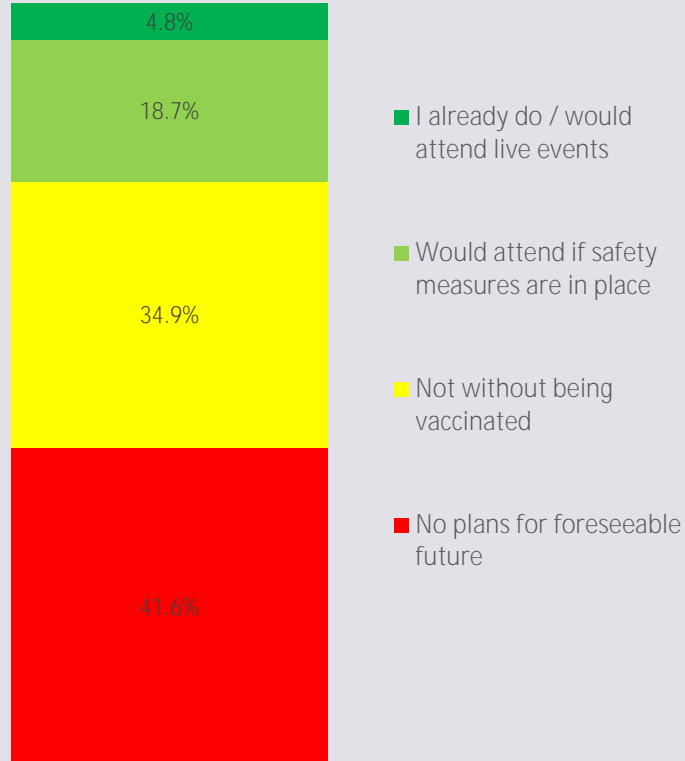
These charts demonstrate the stark reality of the impact of COVID-19 on participatory and spectator sport. While some respondents will have varying degrees of attending or participating in sports before the pandemic, it is a sad reality that many aspects of organized or recreational sport have come to a near halt since March of 2020.



Return to Sport and Travel – Attending Sport Events

When do you plan to physically return to live events such as festivals and sporting events?

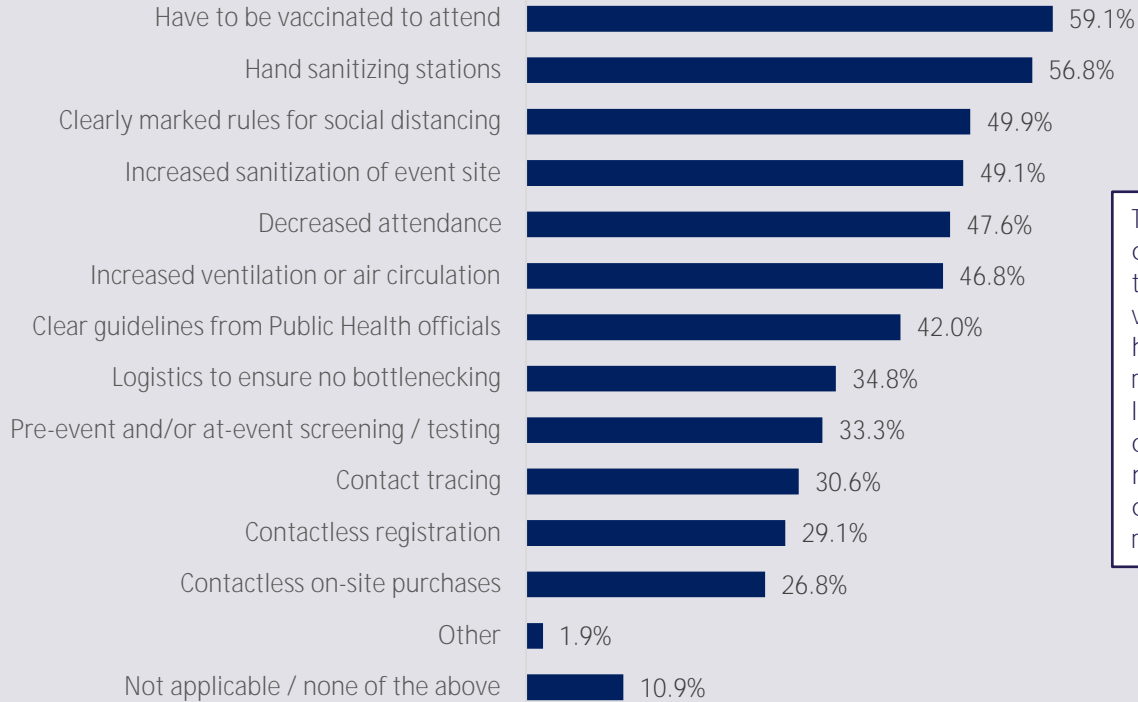
Vaccines are positioned as the key to fully open back up, but it's clear it's not the magic answer for all people to feel comfortable returning to normal activity. 42% say they don't plan to return to events like festivals or sports in the foreseeable future – this while there was an option to choose 'return when vaccinated'. This demonstrates that for some it will take time to feel comfortable getting back to what they did prior to the pandemic.



Return to Sport and Travel – Health & Safety Measures



Health & Safety Measures Most Important for Attending Live Events

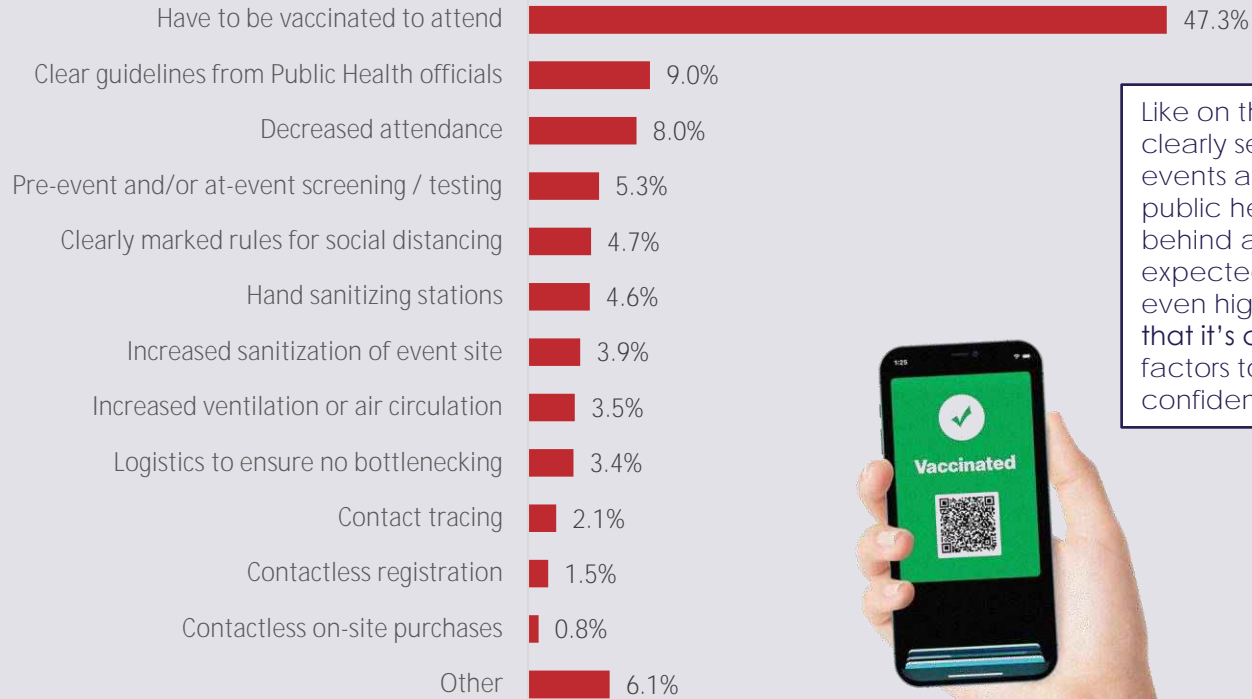


There are many aspects people consider as important for a return to events, though no runaway winners exist as vaccines and hand sanitization are the only two receiving over 50% of responses. It also demonstrates the number of considerations event planners must have to implement to ensure confidence for spectators to return to watch live events.



Return to Sport and Travel – Health & Safety Measures

The one thing absolutely necessary for you to return to live events:



Like on the previous slide, vaccines are clearly seen as the key to a return to events at 47%, with clear guidelines from public health officials 2nd, and well behind at 9%. It is reasonable to have expected vaccine importance to be even higher, so people are recognizing that it's crucial but there remain other factors to consider needed for public confidence and recovery.



Activity Preferences

REGIONALIZATION » There has been a push from tourism authorities across Canada to stay closer to home and support hotels, restaurants, activities, and tourism operators within their region. Be it for sport, taking kids to sport, or vacation, people are more likely to travel within their region with lesser interest shown for travel to other parts of Canada. For vacations, people have some interest in traveling outside Canada but that too is muted.

SPORT AND BUSINESS TRAVEL HURT » Travel for watching or playing sport, and for business, have been severely hampered due to the pandemic. As spectator sport events have been eliminated in Canada and sport participation has been curtailed, it is not surprising few people have taken related trips. Though businesses may continue to restrict travel for safety and to control costs, not to mention the availability of online meeting platforms, sport competition at all levels is likely to restart in 2021 encouraging movement of people not only within regions, but across Canada.

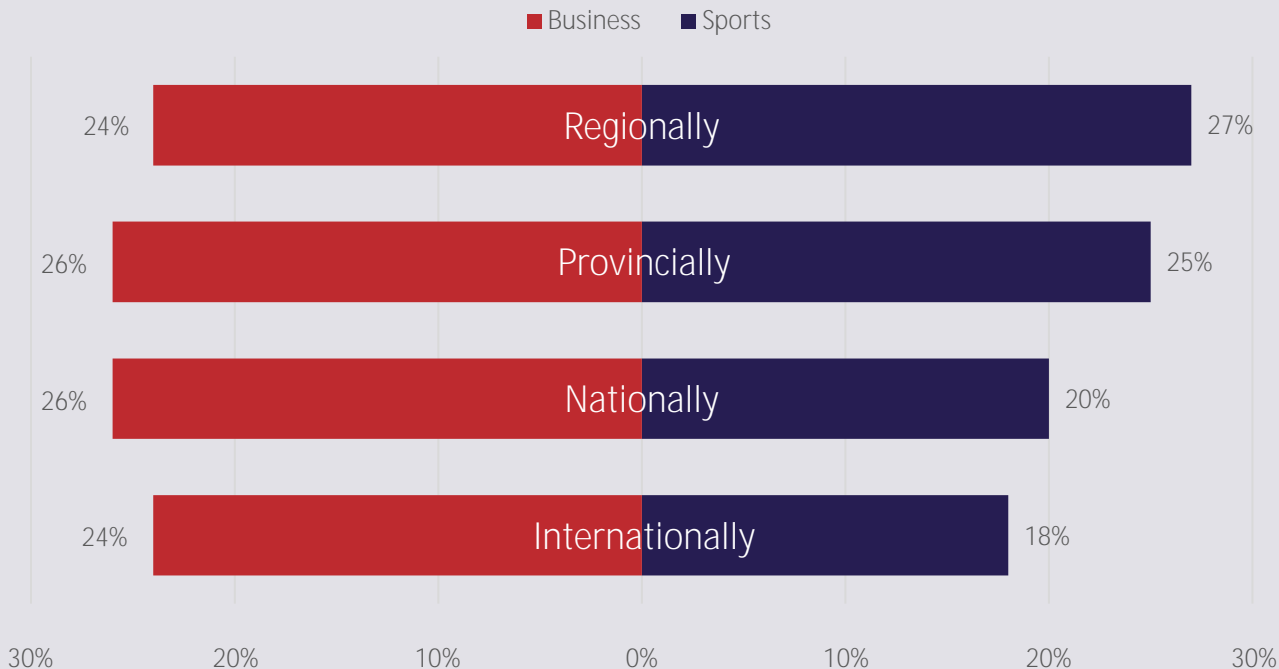
CRYSTAL BALL » Looking ahead beyond September 2021, people are willing to travel, and to travel for sport. 78% are looking to take a vacation in their home province or territory and 65% are planning to travel near to home for a sporting event. Both these results paint a positive picture that people are ready and are confident for travel, which means as sporting events restart, they can expect people to be confident in coming to take part.

FAMILY TIME » 45% of people express that they've most missed time with friends and family during the pandemic. Travel and vacations are next at 25%. While it may appear that people have missed sport less, it is important to consider that time with family and friends often includes sport and even sport travel. The desire to engage with others post-pandemic will see people, when comfortable, getting out to a range of activities including spectator sports, sport participation, or youth sport.



Activity Preferences – Travel Likelihood – Sport vs. Business

More Likely to Travel For...



Business trips, where people may have less control or choice as to whether to go and where to go, largely match visitation for sport in a regional and provincial or territorial context. Travel for sport however, as compared to business, does drop for national and international destinations, as would be expected and has been noted earlier in this report.



Activity Preferences – Travel Likelihood – Sport vs. Leisure

More Likely to Travel For...



With all the restrictions that have been in place for many months now, there is little surprise that there is pent up desire to travel for leisure and take a vacation. Taking a vacation is listed as the #1 activity respondents are most interested in doing when restrictions are lifted.



Activity Preferences – Travel During Pandemic

Have you or your family taken any trips since the pandemic was declared for leisure / business / sports?

Travel Type & Distance	Leisure	Business	Sport
Yes, we have driven a short distance for	40.3%	6.3%	5.5%
Yes, we have driven a long distance for	14.1%	4.8%	2.6%
Yes, we have taken a flight for	5.1%	3.4%	3.0%
Yes, we have used other transportation for	4.0%	3.2%	1.4%
No, we have not taken any trips	53.8%	88.3%	90.4%

Throughout the pandemic in Canada, provinces and territories have discouraged travel to other parts of the country while encouraging to move about their region for leisure travel. This chart demonstrates that respondents have largely adhered to those recommendations doing virtually no sport or business travel while doing any leisure trips closer to home and by car.

Businesses may continue to restrict travel, for cost and safety reasons, while sport has the potential to support economic recovery as events, training, and participation start to ramp up. This should see increased movement of people at minimum within their regions and nearby provinces and territories.

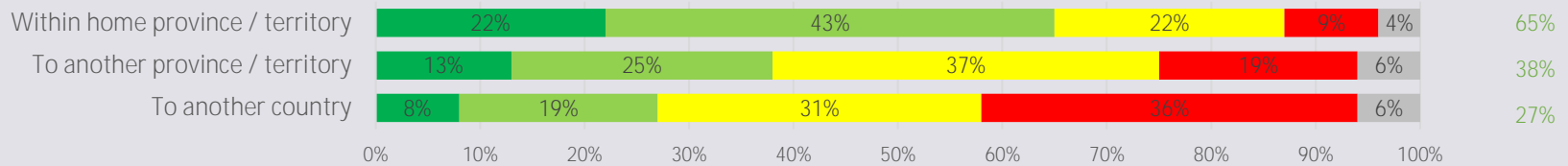


Activity Preferences – Travel Likelihood

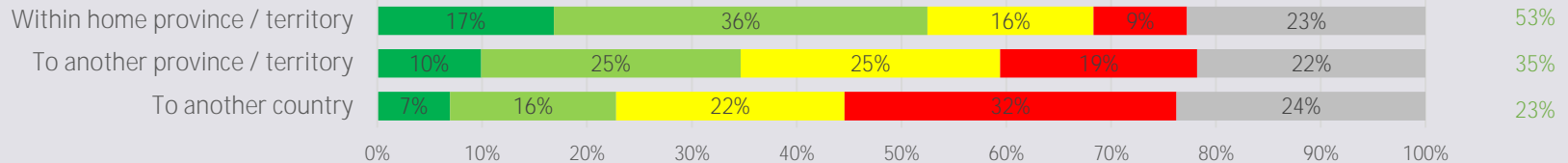
Looking ahead (beyond September 2021), how likely are you to travel to each of the following areas in order to...

Attend Sporting Event / Tournament / Game

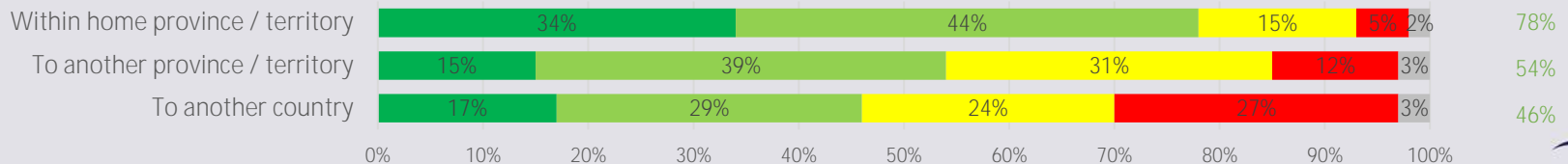
Top 2 Box



Participate or Chaperone Child to Participate in a Sporting Event



Go On Vacation

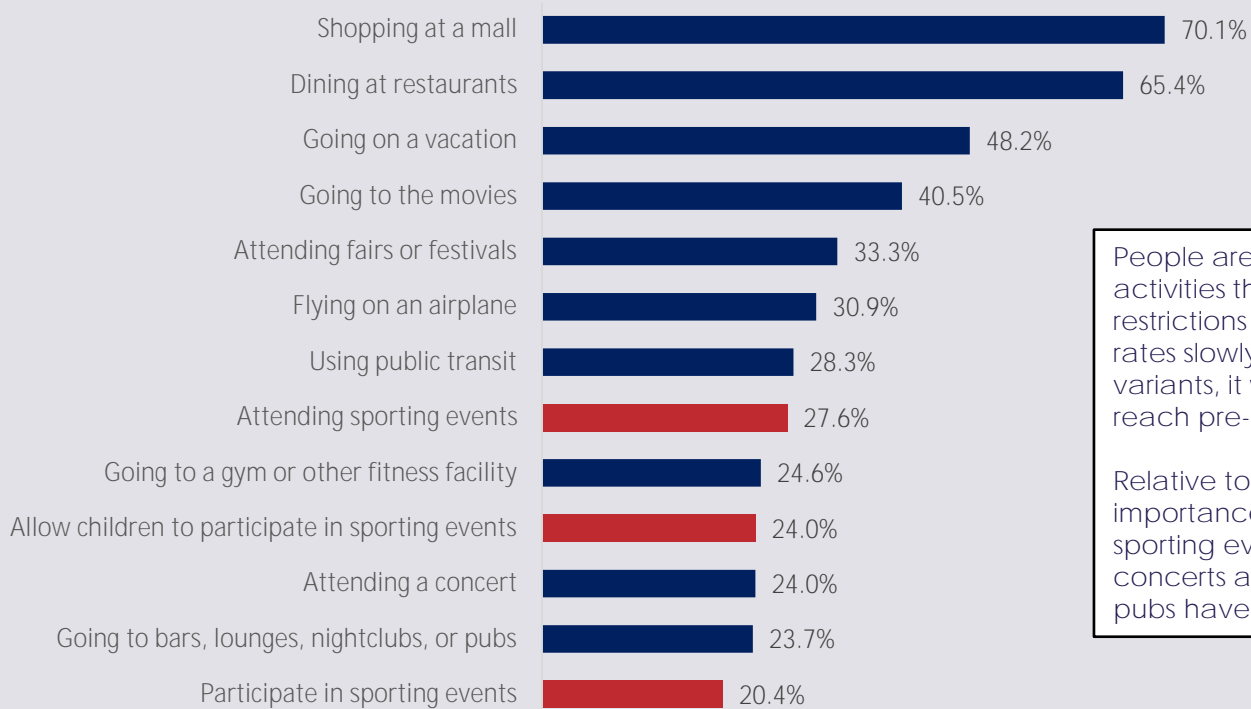


■ Definitely will
 ■ Probably will
 ■ Probably won't
 ■ Definitely won't
 ■ Not applicable



Activity Preferences – Post-COVID

Once government lifts protective measures, which activities would you be comfortable doing?



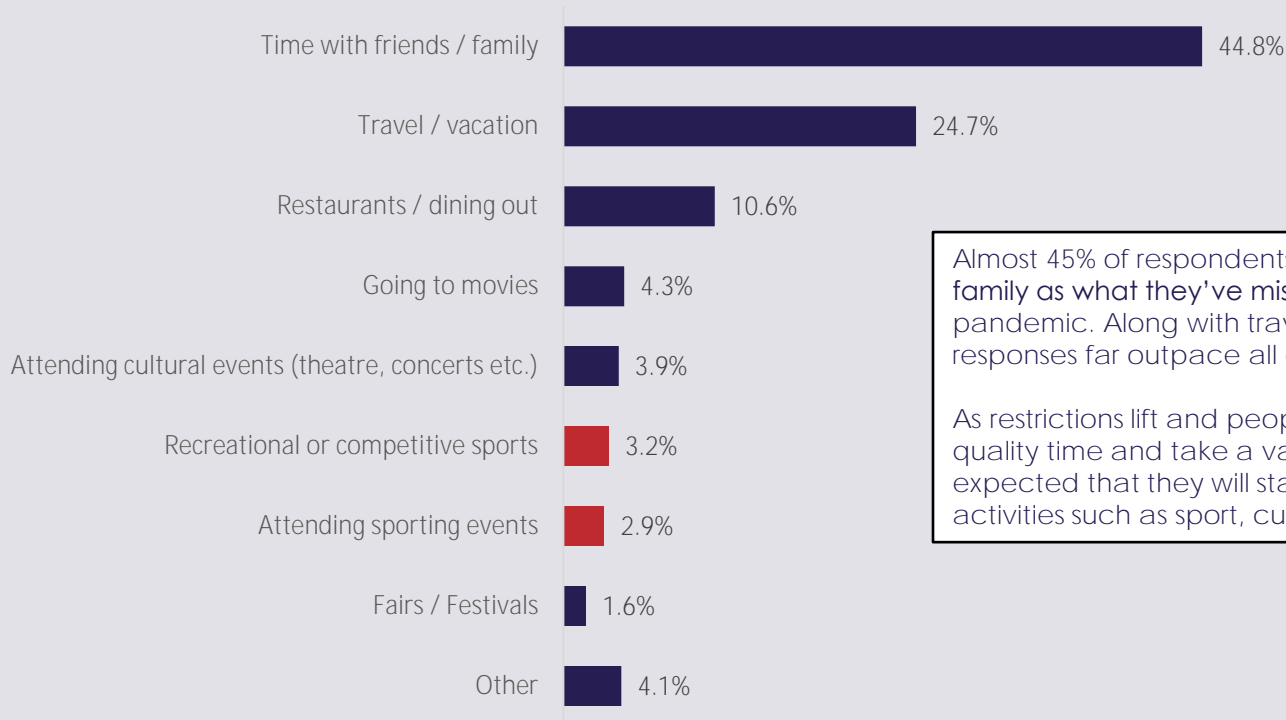
People are less comfortable doing all listed activities than they were before COVID. With restrictions slowly being removed, vaccination rates slowly rising, and the existence of new variants, it will still take time before people reach pre-COVID levels of ease.

Relative to other activities, sport has grown in importance, especially the attendance at sporting events and children in sport. Going to concerts and bars, lounges, nightclubs or pubs have dropped in relative comfort level.



Activity Preferences – What’s Been Missed

What have you missed MOST due to restrictions caused by the pandemic?



Almost 45% of respondents list time with friends and family as what they've missed the most during the pandemic. Along with travel and vacation, those responses far outpace all other activities.

As restrictions lift and people can spend that quality time and take a vacation, it can be expected that they will start to return to those other activities such as sport, cultural events, or festivals.





Appendix

Methodology

Acknowledgements

Contact Information

Methodology

Sport Tourism Canada (STC) conducted this study in an effort to collect and analyze primary data from Canadians interested in sport and sport events to deliver the type of intelligence necessary to help guide industry decision makers for the safe return of sport events. Understanding the views of Canadians on issues of importance with what is required for events to safely return, will provide the information to restore confidence in hosting, participating, and viewing sport events.

This study was conducted with a nationally representative sample of Canadian with quotas built in to ensure a reliable sample of sports fans, sport participants, and parents of children participating in sports. The survey was developed by Sport Tourism Canada and deployed through a leading global research provider utilizing their proprietary audience panel.

SURVEY DETAILS

Total Responses	1,007
Market	Canada
Method	Online
Questions	39
Average LOI	8 minutes
Languages	English & French
Field Dates	05/09/2021 – 05/14/2021
Margin of Error	+/- 3.1% at 95% confidence level



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Sport Tourism Canada assembled a team of industry experts to manage and steer this project from concept to completion...

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Acknowledgements

Sport Tourism Canada would like to thank Destination Canada for their support of this project and the continued commitment to finding ways for sport tourism to be part of Canada's recovery from COVID-19 while rebuilding confidence of Canadians to travel and visit other locations with sport as the primary motivator.

Sport Tourism Canada would also like to thank these organizations and individuals for their support and involvement...

Organizations:

- The Data Jungle
- IMI International
- Charlton Insights | YouGov

Individuals:

- Grant MacDonald
- Derek Mager
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- Doug McLean
- Barb MacDonald
- Riley Denver



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SPORT
TOURISM
— CANADA —

The logo features the word "SPORT" in a large, bold, dark blue sans-serif font. The letter "O" is replaced by a red maple leaf icon. Below "SPORT" is the word "TOURISM" in a smaller, dark blue sans-serif font. At the bottom, the word "CANADA" is written in a red sans-serif font, flanked by two horizontal lines.