



Bouncing Back

Preparing for a Sport Hosting
and Economic Reboot

Part 3: Canadians - Sports
Fans and Participants

EXECUTIVE SUMMARY

June 2021

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

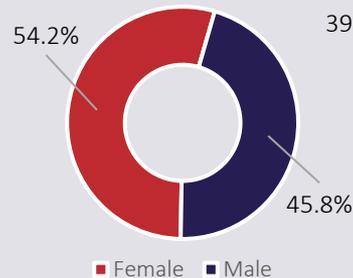
In partnership with Destination Canada, Sport Tourism Canada is pleased to present the third in a series of three (3) reports that will help to explore and define the challenges facing the recovery of sport tourism. This report seeks to answer some pivotal questions for the industry:

What is consumer sentiment for sport event attendance and participation?

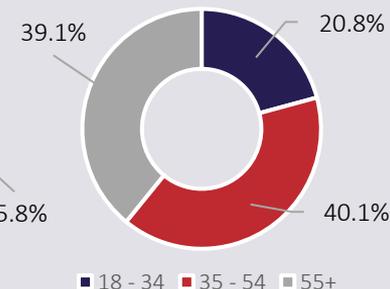
What will a return to sport participation and spectating look like?

What factors improve the likelihood for a speedier recovery?

Gender

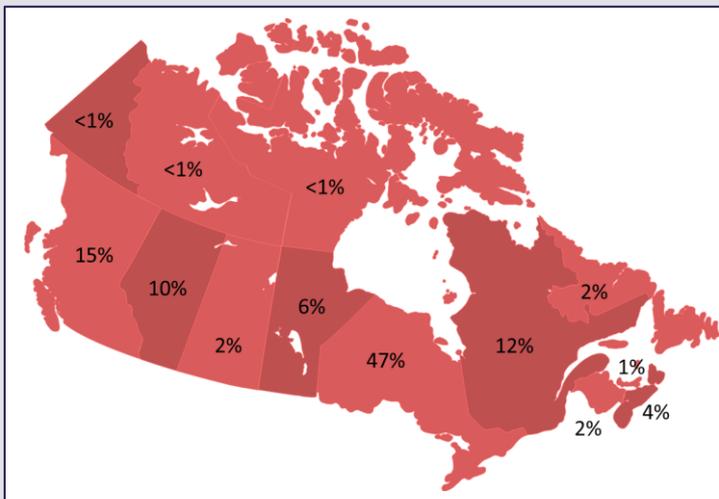


Age Range



■ Female ■ Male

■ 18 - 34 ■ 35 - 54 ■ 55+



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,"

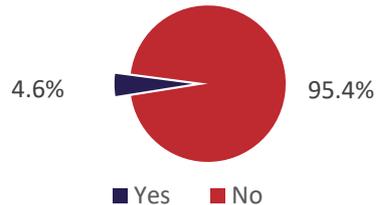
Dan Wilcock, President and CEO, Canada Games Council speaking to a national study on the impact of the pandemic on youth activity in sport

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

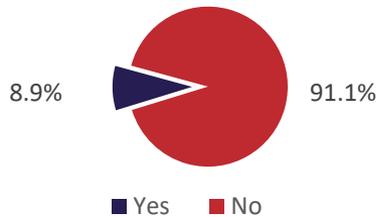
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Sport Attendance & Participation

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?



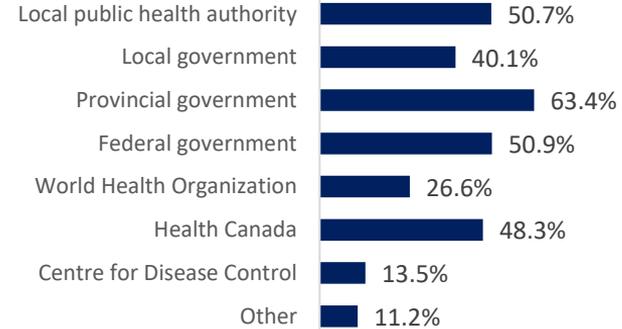
From those who indicate they attended or participated in sports prior to the pandemic, these charts are very stark demonstrations of the challenges caused by COVID-19. With virtually no events taking place since the pandemic was declared, it is no surprise to see only **5% of respondents having attended 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.

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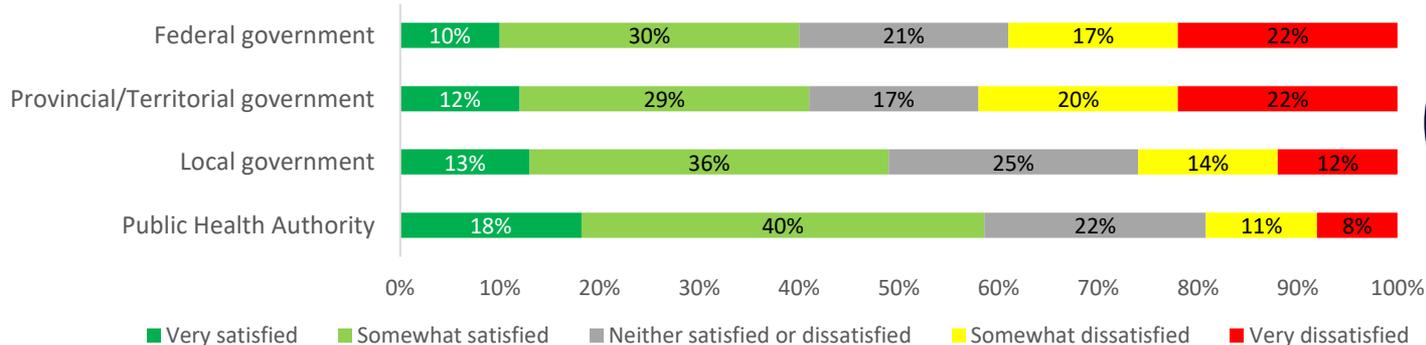
Information Sources & Handling of the Pandemic

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?

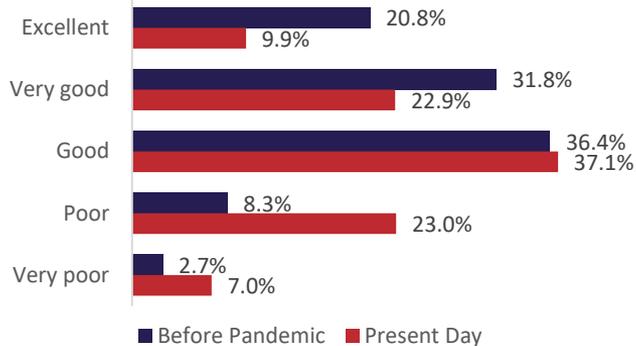
Satisfaction on Handling of Pandemic



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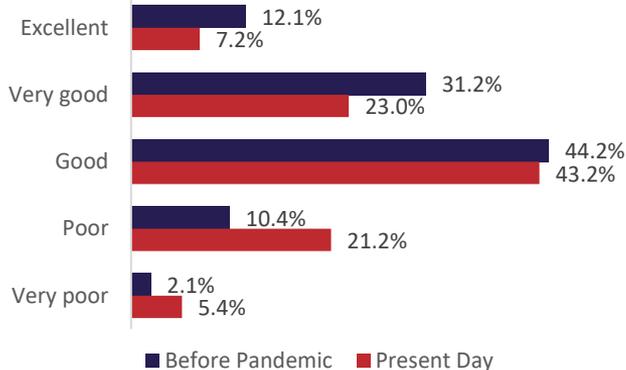
Mental & Physical Health

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.

Physical Health



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%**.

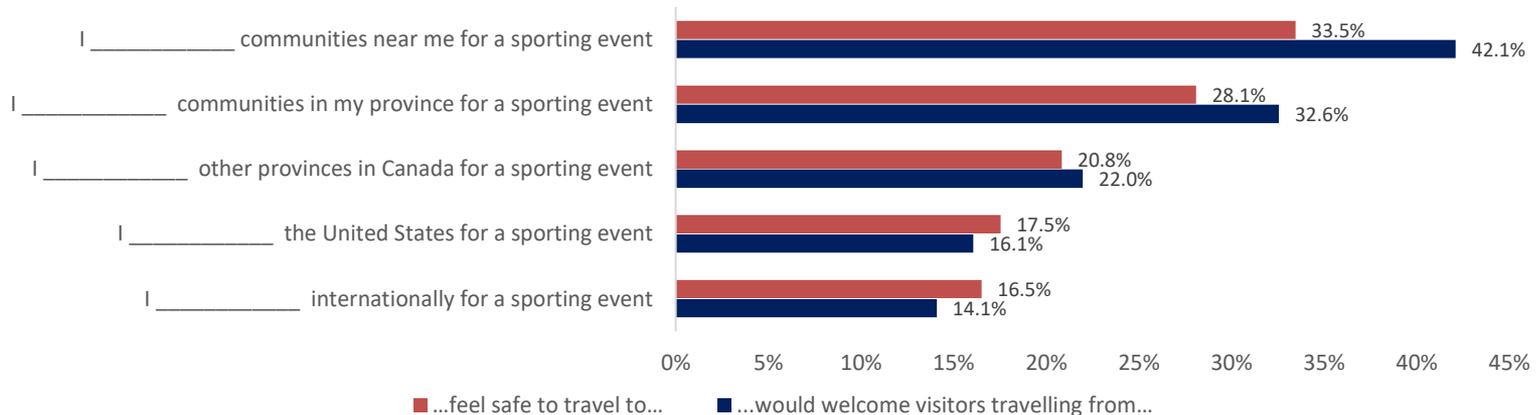
“The pandemic has been incredibly hard for many people. There has been significant loss—of loved ones, of connection, of feelings of security. This can contribute to very challenging emotions, and it is important to acknowledge and process.” says lead researcher Emily Jenkins, a professor of nursing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

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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



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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

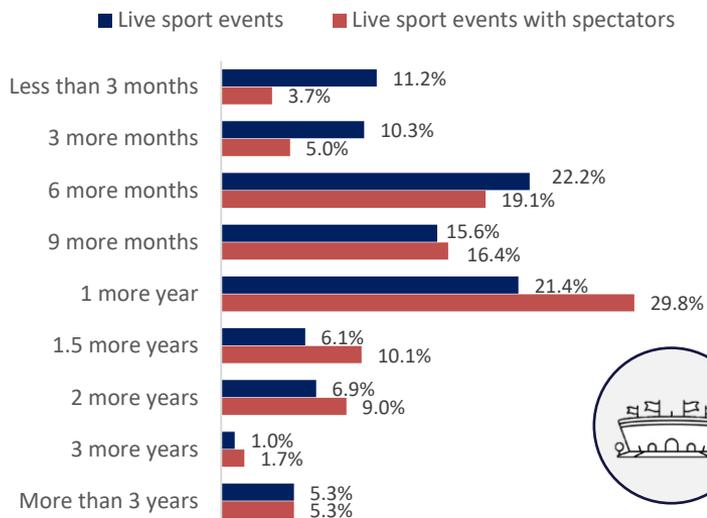


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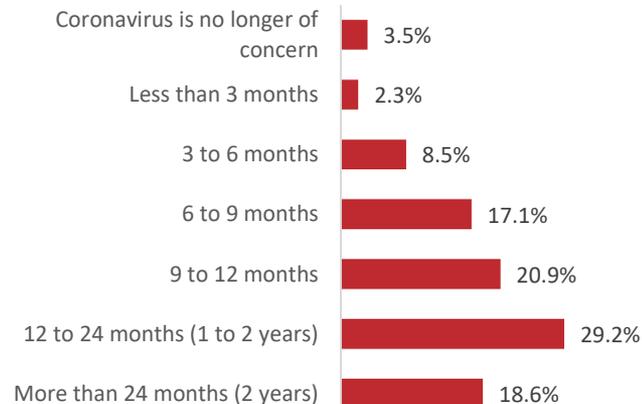
Anticipated Timeline

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?



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Return to Live Events

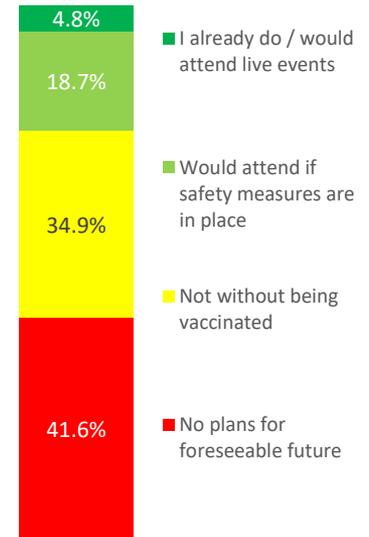
Vaccines are positioned as the key to fully open back up, but, somewhat surprisingly, for some people they are not enough to feel comfortable returning to normal activity. **42% say in the foreseeable future they don't plan to return to events** like sports or festivals. 35% do, however, see vaccines 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?

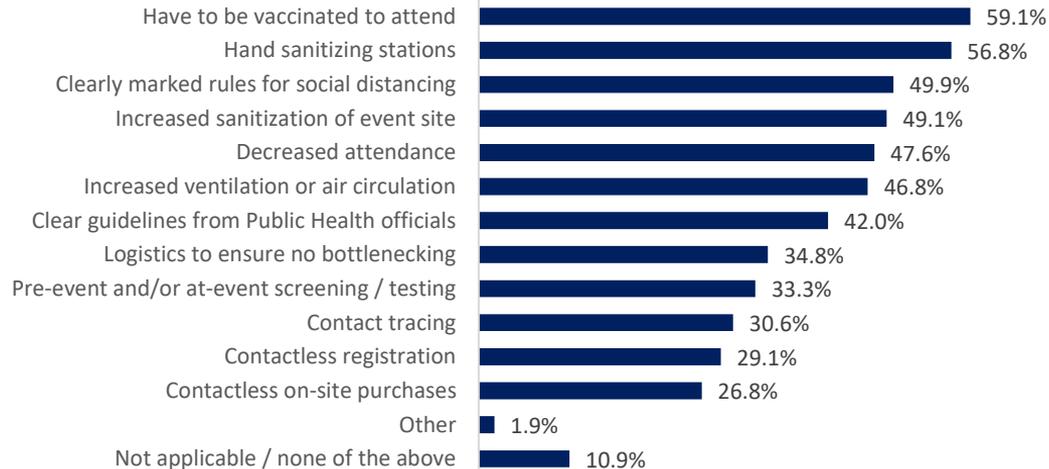


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Return to Live Events

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



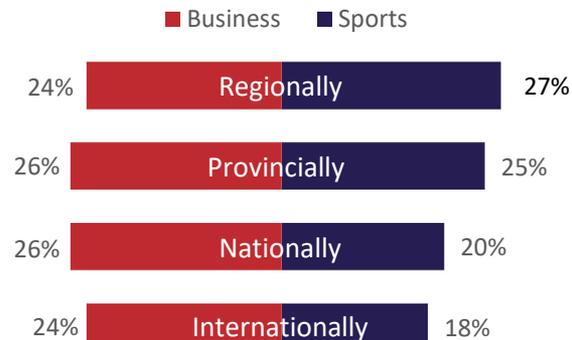
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Travel Drivers

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%

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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%

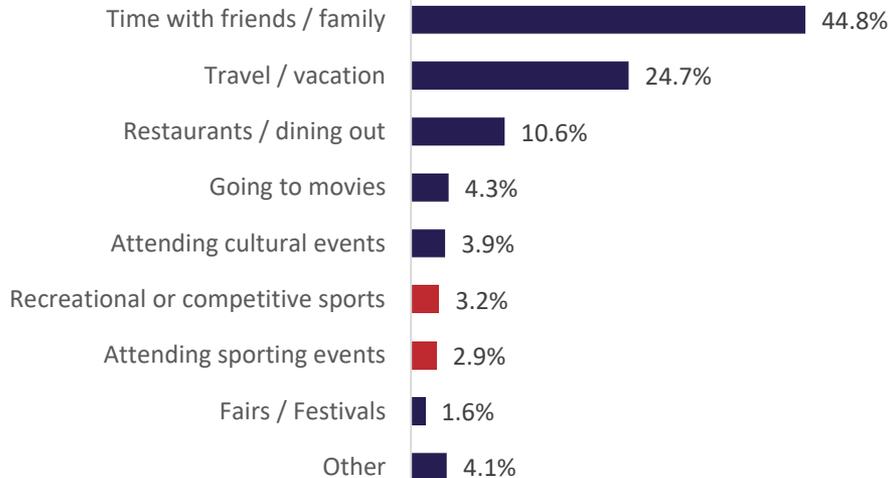
(Percentage of respondents saying 'definitely or probably will')

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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?



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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

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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.

Report Authors

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

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SPORT
TOURISM
CANADA

The logo for Sport Tourism Canada is centered on a white background. The word "SPORT" is in a large, bold, dark blue font, with a stylized red maple leaf inside the letter "O". Below "SPORT" is the word "TOURISM" in a smaller, bold, dark blue font. Underneath "TOURISM" is the word "CANADA" in a bold, red font, flanked by two horizontal lines. The background features a large red triangle in the top-left corner and a dark blue triangle in the bottom-left corner, meeting at a diagonal line.