

The IMI logo is a dark blue arrow pointing to the right, containing the letters 'IMI' in white, serif, all-caps font.

IMI

The background image shows the exterior of the Canadian Baseball Hall of Fame & Museum. The building is a single-story structure with light-colored horizontal siding. A prominent entrance features a red awning over a set of glass doors. To the right of the entrance, the words 'THE CANADIAN BASEBALL HALL OF FAME & MUSEUM' are mounted on the wall in large, dark, spaced-out letters. A ramp with a metal handrail is visible on the right side of the building. The sky is clear and blue, and there are green trees in the background.

THE CANADIAN BASEBALL
HALL OF FAME & MUSEUM

The title text is overlaid on a white arrow-shaped graphic pointing to the right, which is set against the background of the museum building.

**Canadian Baseball Hall Of Fame and Museum:
2020 BASEBALL SURVEY REPORT**

July 10, 2020

IMI International Overview

CORE PURPOSE

INSIGHT
DRIVING
PROFIT

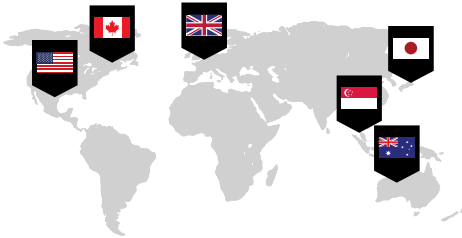
POINT OF DIFFERENCE

50,000+ Case Studies



What's now, and what's next?
Thousands of studies since 1971

LOCATIONS



THOUGHT LEADERSHIP

NEXTWAVE

- What's now, and what's next?
- Thousands of studies since 1971
- Dedicated team + SMEs
- Immersed in ongoing exploration
- Provide fact-based guidance for the next 12-24 months

ABOUT US

- 70 PEOPLE
- 100+ CLIENTS
- 45 COUNTRIES

COMMITMENT TO EXCELLENCE



If, for any reason, IMI International does not satisfy the objective defined in the agreed-to proposal, the project will be refunded in full.

What we'll cover

4 Background & Methodology

5 Executive Summary

6-7 Respondent Profile

8-13 Baseball Today: Engagement Landscape

14-20 Baseball Moments & Experiences That Matter Most

21-22 Baseball Tomorrow: The Future

Background & Methodology

Objectives

Provide the Canadian Baseball Hall of Fame and Museum (CBHFM) with insightful, but fun fact-based data regarding Canadian baseball fans from across the country to gain a better understanding in the following areas:

1. Baseball Participation & Pro League Engagement
2. Baseball Today – Fans’ perspective of the sport
3. Baseball Tomorrow – Most desired changes moving forward for the game

Key Definitions for respondent groups in this report:

Total: Total Respondents surveyed

Avid Fan: Watches Regularly/Goes out of way to watch baseball

Casual Fan: Watches baseball occasionally

Screening Criteria

Canadian Residents aged 18+ recruited through CBHFM’s email database and social media pages

A public survey link was also posted by CBHFM on its social media pages

Timeline (field dates)

June 18th to June 30th, 2020

Methodology

15-minute survey online

Sample

Total n=904

Note: Sample for this survey is comprised of more passionate (avid) baseball fans vs. a natural fall-out Canadian general population sample of baseball fans.

Sample for this survey is comprised of 91% passionate (avid) baseball fans while a national Canadian general population natural fall-out sample of baseball fans is comprised of approximately 55% passionate (avid) baseball fans.



Executive Summary

1

Passionate fans watch baseball on TV by themselves, but rarely attend games alone

Approximately 3 out of every 5 passionate Canadian baseball fans are generally alone when they watch Major League Baseball on TV/Online. When they visit an MLB ballpark, however, they are usually accompanied by friends (67%) or a partner/spouse (59%).

2

A Coronavirus Nightmare: Fans are missing their summertime sport

Nearly 7 out of every 10 fans are missing their fix of baseball games on TV. However, it's the younger fans that are missing the social experience of going to the ballpark the most.

3

The Greatest of All Time (GOATs) of Canadian MLB baseball teams

Youppi, Alomar, Halladay, Vlad, Sr. and Pedro Martinez are all voted as the best in their positions for their respective teams. However, the "Touch 'Em All" Joe Carter hit in 1993 will forever be the greatest Canadian baseball moment.

4

The perfect game is a mix of offense and defense (but slightly more defense)

A tight, defensive showdown just edges a high scoring slugfest for the most fun type of baseball game (40% vs 37%), which might explain why fans believe good starting pitching is clearly the most important feature on a team.

5

Fans want the future of baseball to look shorter, with more DH's

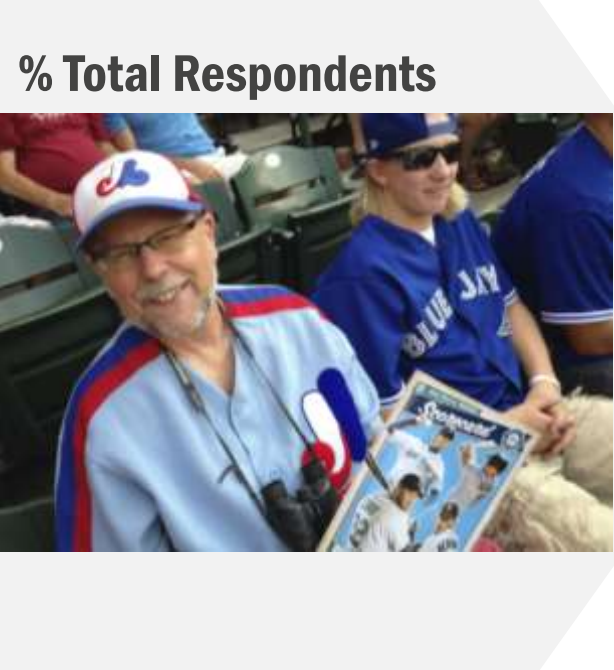
The length of an average baseball game was ranked as the #1 disliked feature of the sport. In fact, just more than half of fans surveyed expressed that Major League Baseball games need to become shorter. 1 in every 5 fans also want to see the designated hitter become universal.

Respondent Profile



A Look at the Respondents

Base: Total (n=904)



% Total Respondents



85%
Males

15%
Female



6%
18-30

12%
31-38

42%
39-54

20%
55-64

19%
65+



37%
Baseball Player

63%
Non-player



7%
West

86%
Ontario

5%
Quebec

3%
East



36%
Kids in HHLD <18

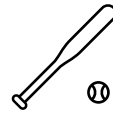
64%
No Kids in HHLD



91%
Avid Fan

8%
Casual Fan

1%
Not MLB Fan



59%
Kids Play
Baseball
(if Kids in HHLD)

41%
No Kids Play
Baseball
(if Kids in HHLD)



81%
Favourite Team

19%
Not Favourite Team

HHLD: Abbreviation for "Household"

Note: Sample for this survey is comprised of more passionate (avid) baseball fans vs. a natural fall-out Canadian general population sample of baseball fans.

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Baseball Today: Engagement Landscape



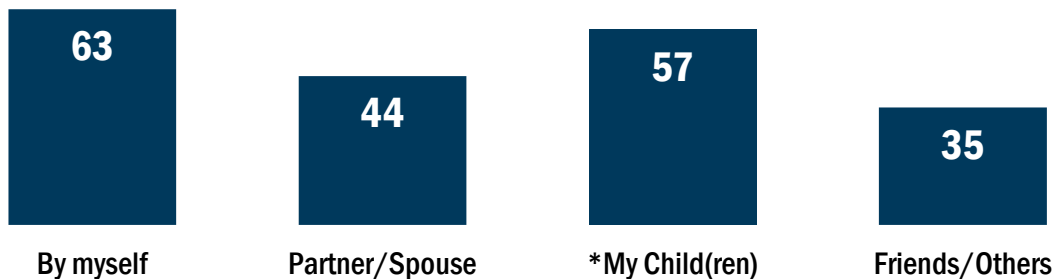
Baseball is a family occasion: where kids are present, majority watch as a family and are more likely to attend as a family



MLB Viewing Companionship

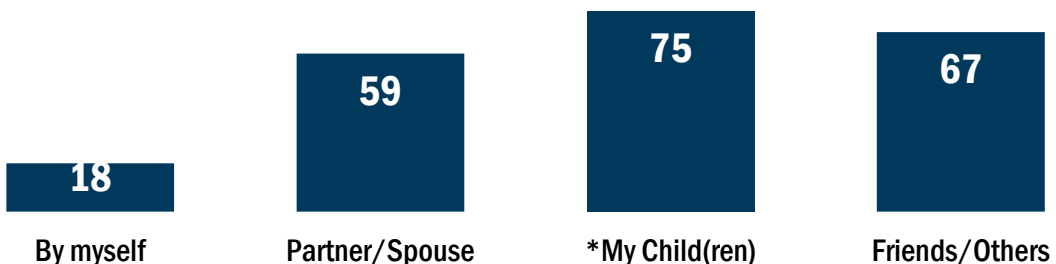
Watch on TV/Online

% Selected, Among Viewers of MLB baseball

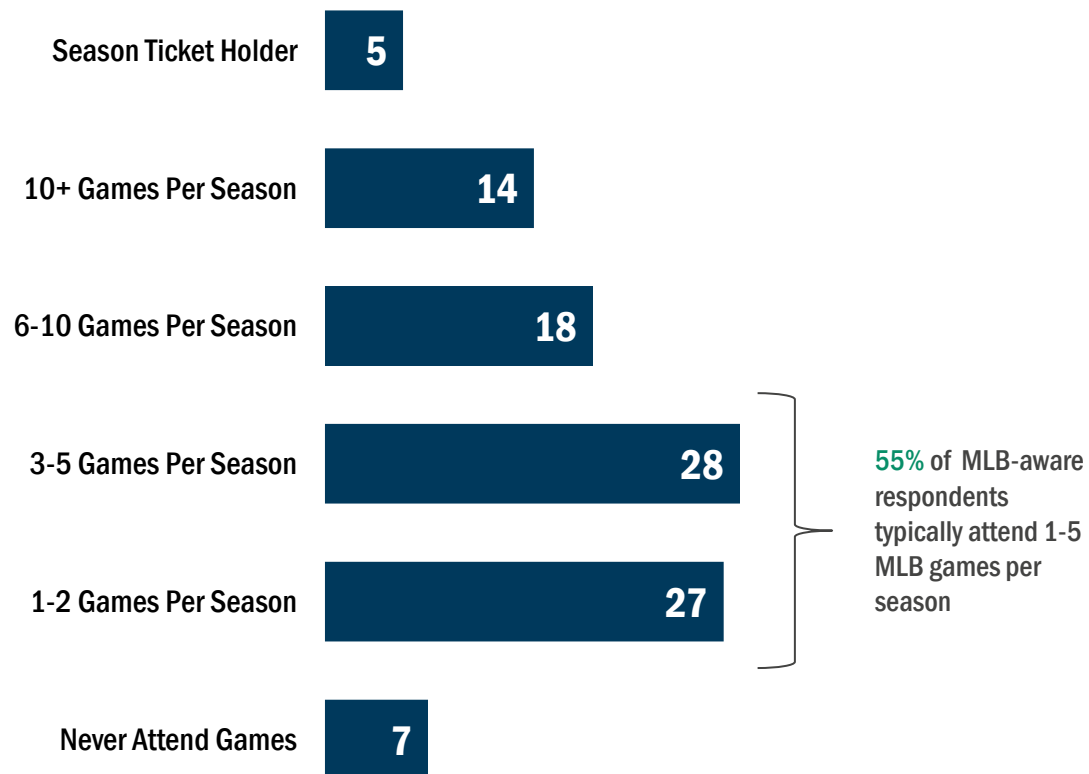


Attend Games (in person)

% Selected, Among MLB Baseball Game Attendees at least once per season



MLB Game Attendance Frequency (Among aware of MLB)



Q11. With whom do you typically watch games on television or online during a typical season for these baseball leagues?

Q12. Please indicate the extent to which you personally attend (in person) each of the following during a typical season.

Q13. With whom do you typically attend games (in person) during a typical season for these baseball leagues?

Base: MLB Viewers (n=891), MLB Baseball Game Attendees (n=840), Aware of MLB (n=903)

*My Child(ren): Among respondents with children <18 in HHL



Respondents love the action and the strategic intricacies within baseball, but the slow pace of the game and the MLB Owners/business disputes are by far the biggest complaints

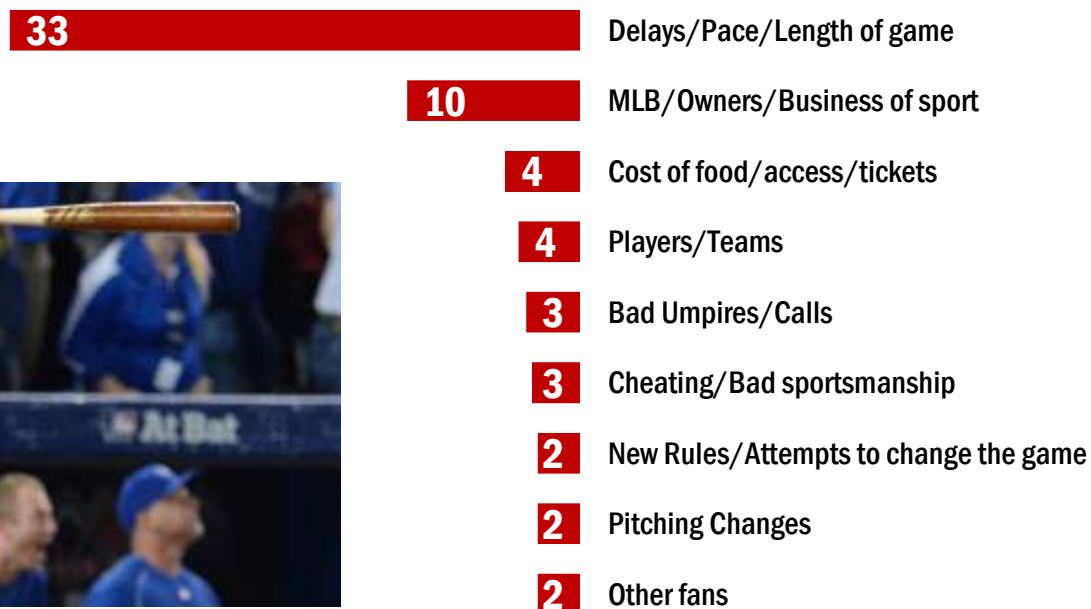
What do you **LIKE** the most about baseball?

% Top Unaided Mention, Total



What do you **DISLIKE** the most about baseball?

% Top Unaided Mention, Total



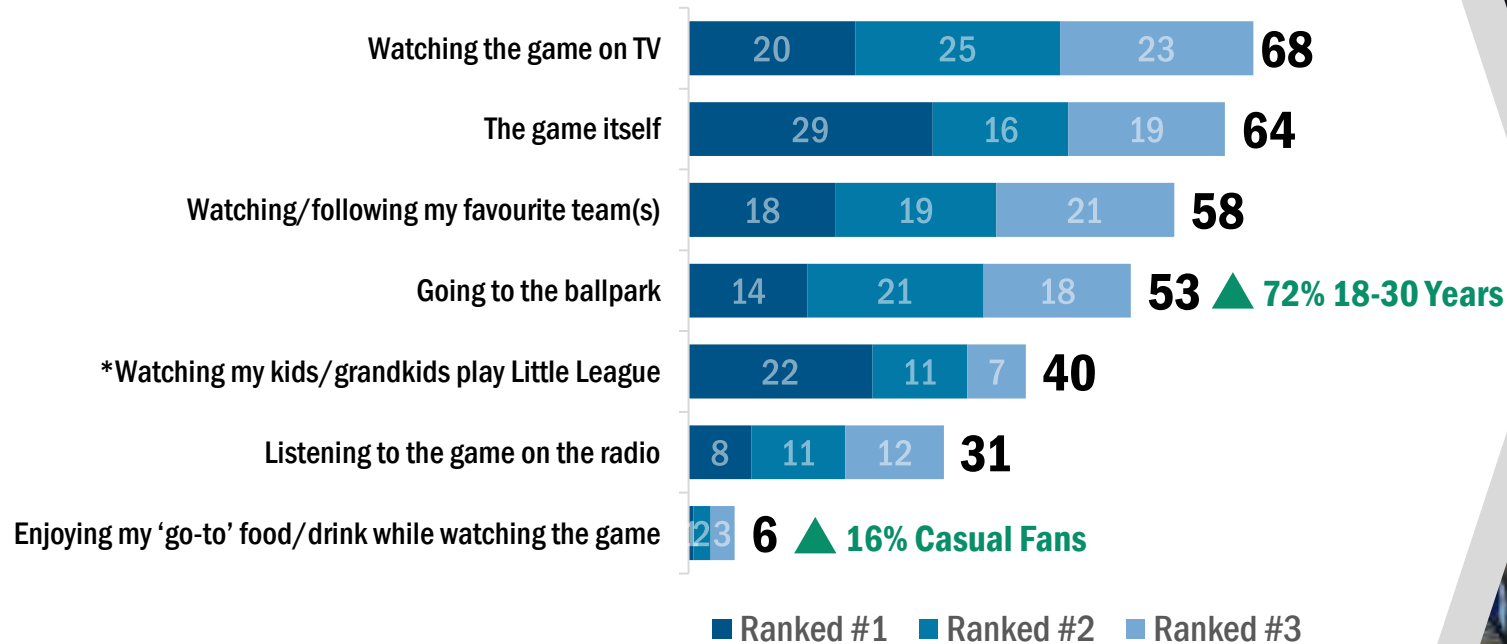
Q.15 What are the top 3 things that you like the most about baseball?
Q.16 And what are the top 3 things that you dislike the most about baseball?
Base: Total (n=904)

A Coronavirus nightmare: Almost 7-in-10 passionate fans are most missing their daily fix of baseball games on TV. Younger respondents miss going to the ballpark more than others.



Currently Missing the Most About Baseball

% Selected (ranked in top 3), Total



Q17. What are the top 3 things you are missing most about baseball?
Base: Total (n=904)

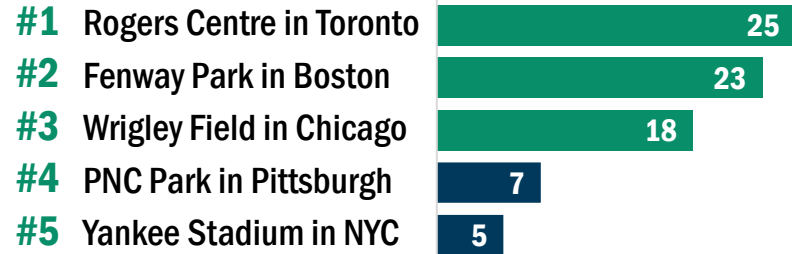
▲ Indicates significantly higher vs. Total at 95% CI

*Among respondents With Children <18 in HHLD

The Ballpark Experience: A hot dog and cold beer are required accompaniments for passionate fans. Rogers Centre is only slightly ahead of Fenway as the favourite ballpark.



Favourite MLB Ballparks (Top 5)



Go-to Ballpark Snacks/Beverages (Top 5)



Hot dog
63%



Cold beer
60%



Pop/soda
34%

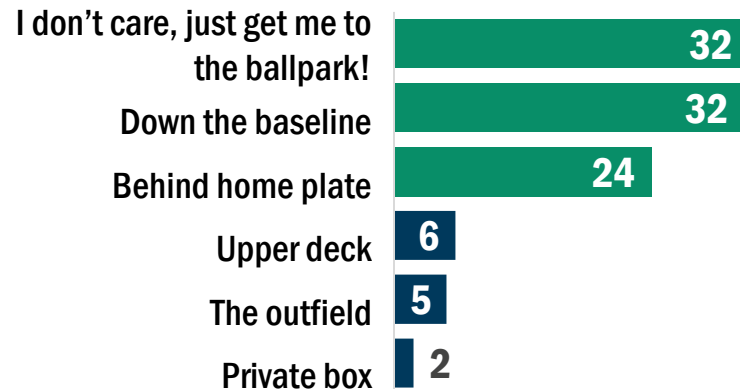


Popcorn
29%



Peanuts/
Cracker Jack
22%

Favourite Place to Watch a Game



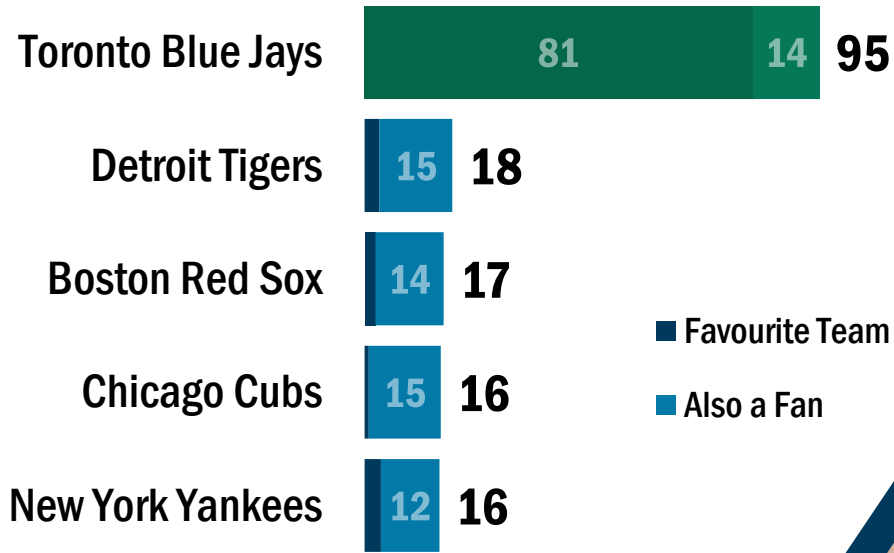
ROGERS CENTRE – Favourite MLB Ballpark



Q18. Where is your favourite place to sit when you go to a game?
 Q20. What are your go-to accompaniments for an evening baseball game?
 Q38. What is your favourite Major League Baseball ballpark?
 Base: Total (n=904)

Toronto Blue Jays: A Truly National Team

Favourite MLB Teams (Top 5)



■ Favourite Team

■ Also a Fan



Q14. Please select your favourite current MLB team and any other team(s) of which you are a fan
Base: Total (n=904)

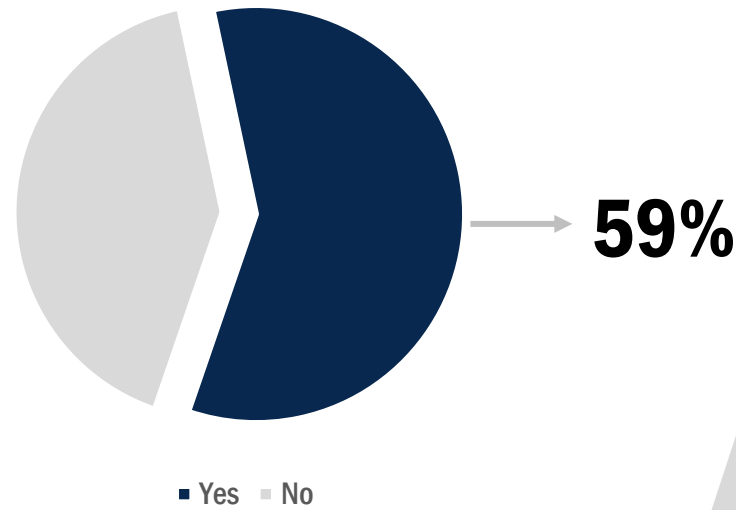
Baseball Moments & Experiences that Matter Most

Passionate fans bring passionate kids into the sport to teach them the value of teamwork, good sportsmanship and strong work ethic



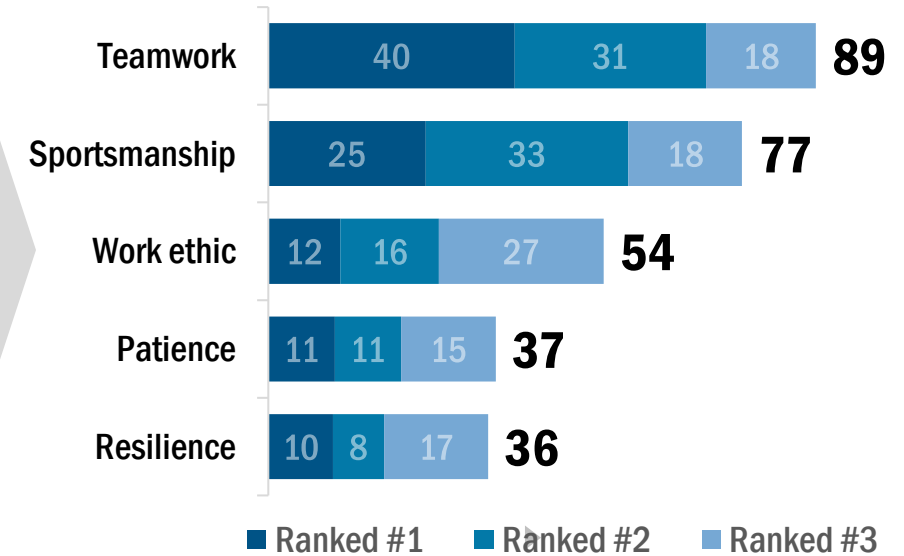
Children that Play Baseball/Softball

% Play Baseball or Softball, Among those with Kids <18



Most Valuable Lessons for Kids

% Selected (ranked in top 3), Among those with Kids <18



Q3. Do your children participate in or play competitive or recreational baseball/softball?

Q19. What are the top 3 most valuable lessons kids can learn by playing baseball or softball?

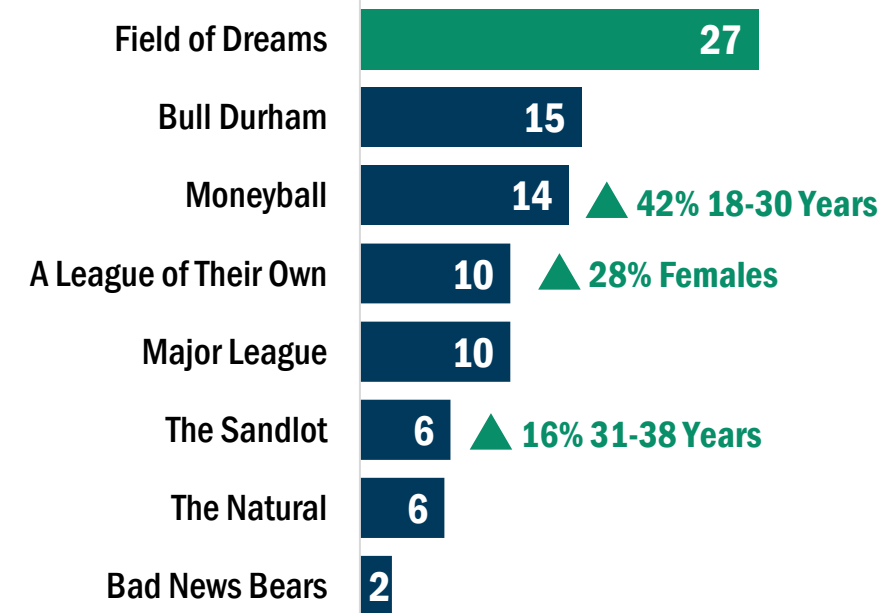
Base: Among those with Kids <18 (n=326)

Respondents prefer “Field of Dreams” when it comes to their favourite baseball films, but younger respondents show a higher preference for “Moneyball”.



Favourite Baseball Movies

% Selected, Total



Q23. What is your favourite baseball movie?
Base: Total (n=904)

▲ Indicates significantly higher vs. Total at 95% CI

Almost half of passionate baseball fans would choose to take in the sights and sounds of a game in the dugout over any other experience



MLB Dream Fantasies

% Selected, Total

- 46%** Sit in the dugout during a game
- 22%** Take batting practice
- 10%** Be the play-by-play announcer
- 10%** Throw out the first pitch
- 4%** Catch a bullpen session
- 2%** Run out to the field with my favourite player
- 1%** Sing the National Anthem

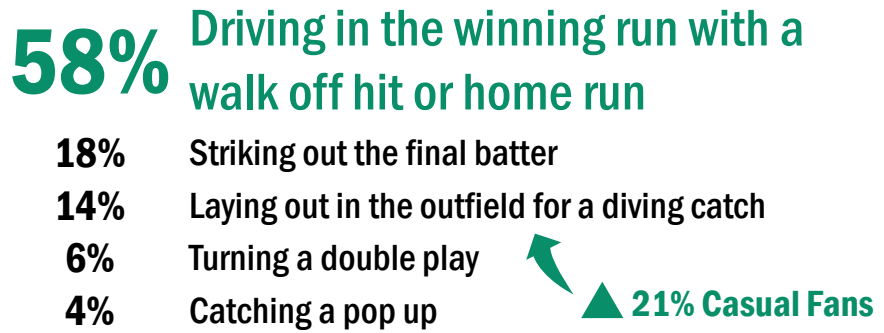
Q22. If you could do one of these things at a Major League Baseball game, what would it be?
Base: Total (n=904)



The Perfect Game: Passionate fans love to watch tense, defensive duels with strong pitching, but younger fans prefer a slugfest. Most respondents would personally want to end a World Series with a Joe Carter-style walk-off.



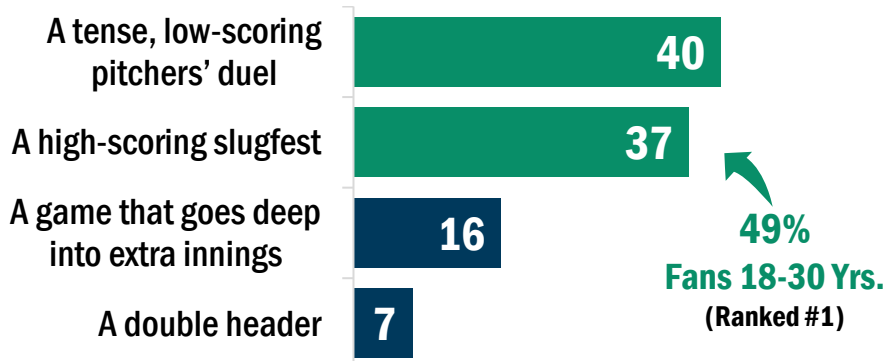
Best way to clinch the World Series



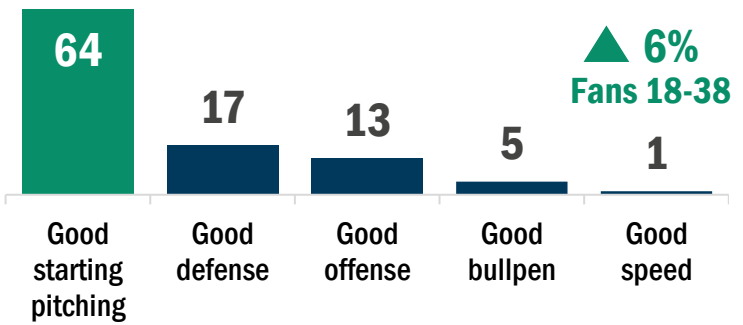
Would most love to see in person



Most fun type of baseball game



Most important on a team



Q33. Put yourself on the field, how would you personally most want to clinch the World Series?
 Q35. What type of baseball game is most fun to watch?
 Q36. What is most important on a baseball team?
 Q37. What would you most love to see in person?
 Base: Total (n=904)

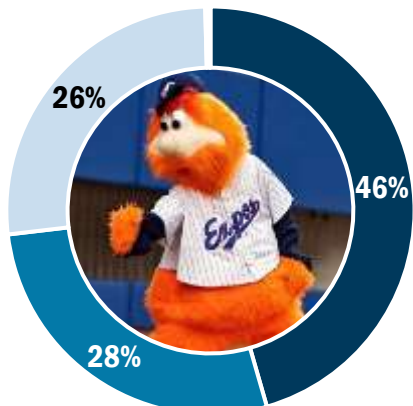
▲ Indicates significantly higher vs. Total at 95% CI



The MLB Canadian Teams Hall of Fame According to passionate fans

Best Canadian Baseball Mascot

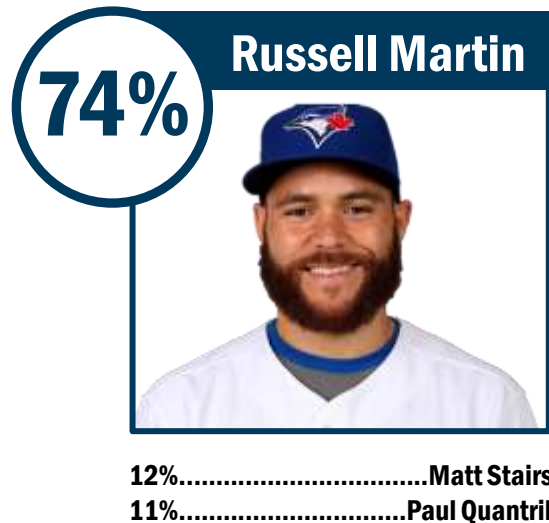
#1 Youppi **#2** BJ Birdie **#3** Ace



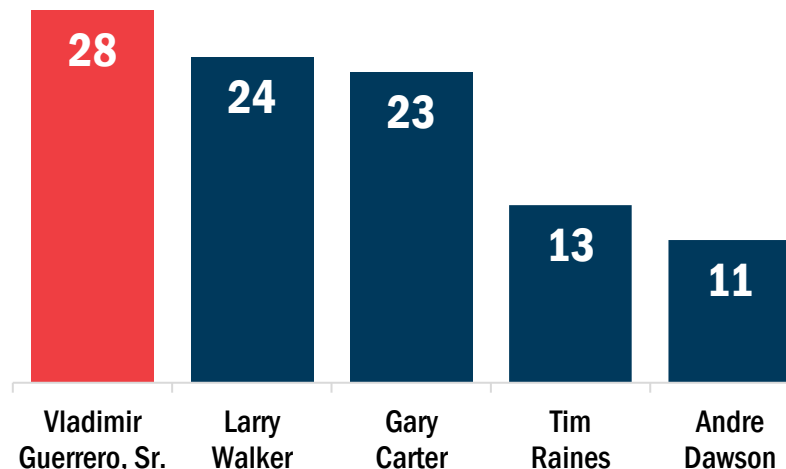
- Perhaps unsurprisingly, **Souki** (Expos) & **Diamond** (Jays) received <1% of total votes
- Even **Toronto** ranks Youppi above Ace (38% vs 26%)
- Women, however, prefer **Ace** (45% among females, ranked #1)

*Among aware of mascots

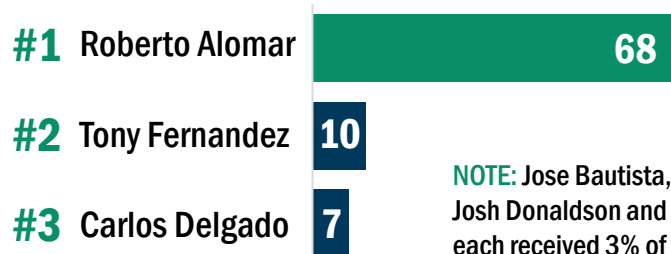
All-Time Best Canadian Blue Jays Player



All-Time Best Expos Positional Player



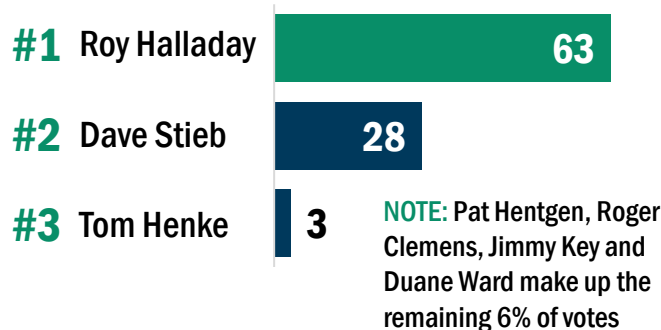
All-Time Best Blue Jays Positional Player



NOTE: Jose Bautista, John Olerud, Josh Donaldson and Joe Carter each received 3% of total votes

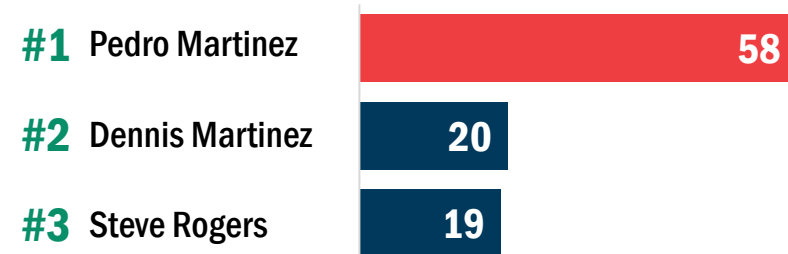
Q25, Q41, Q42, Q43, Q44, Q45
Base: Total (n=904)

All-Time Best Blue Jays Pitcher



NOTE: Pat Hentgen, Roger Clemens, Jimmy Key and Duane Ward make up the remaining 6% of votes

All-Time Best Expos Pitcher

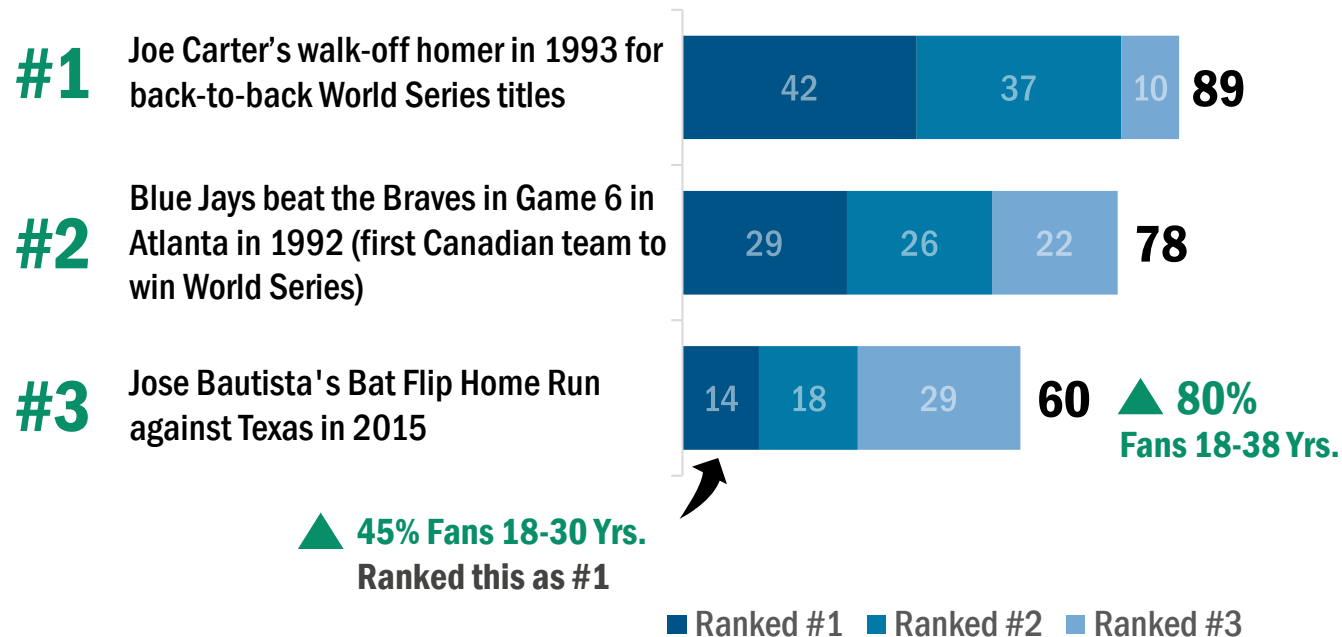




For the Record Books: Joe Carter's back-to-back World Series winner ranks as passionate fans' #1 favourite Canadian baseball moment, but the Bat Flip is a key moment for younger respondents.

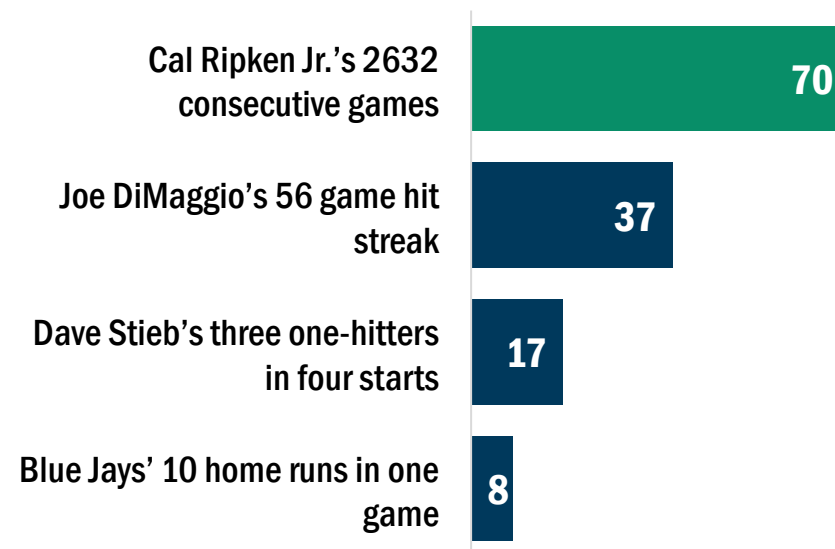
Top 3 Favourite Canadian Baseball Moments

% Selected (ranked in top 3), Total



Baseball Records That Fans Think Will Never Broken

% Selected, Total



14% believe all these records will be broken someday

Q39. What baseball records do you think will never be broken?
Q40. What are your top 3 favourite moments in Canadian Baseball?
Base: Total (n=904)

▲ Indicates significantly higher vs. Total at 95% CI

Baseball Tomorrow: The Future of the Sport





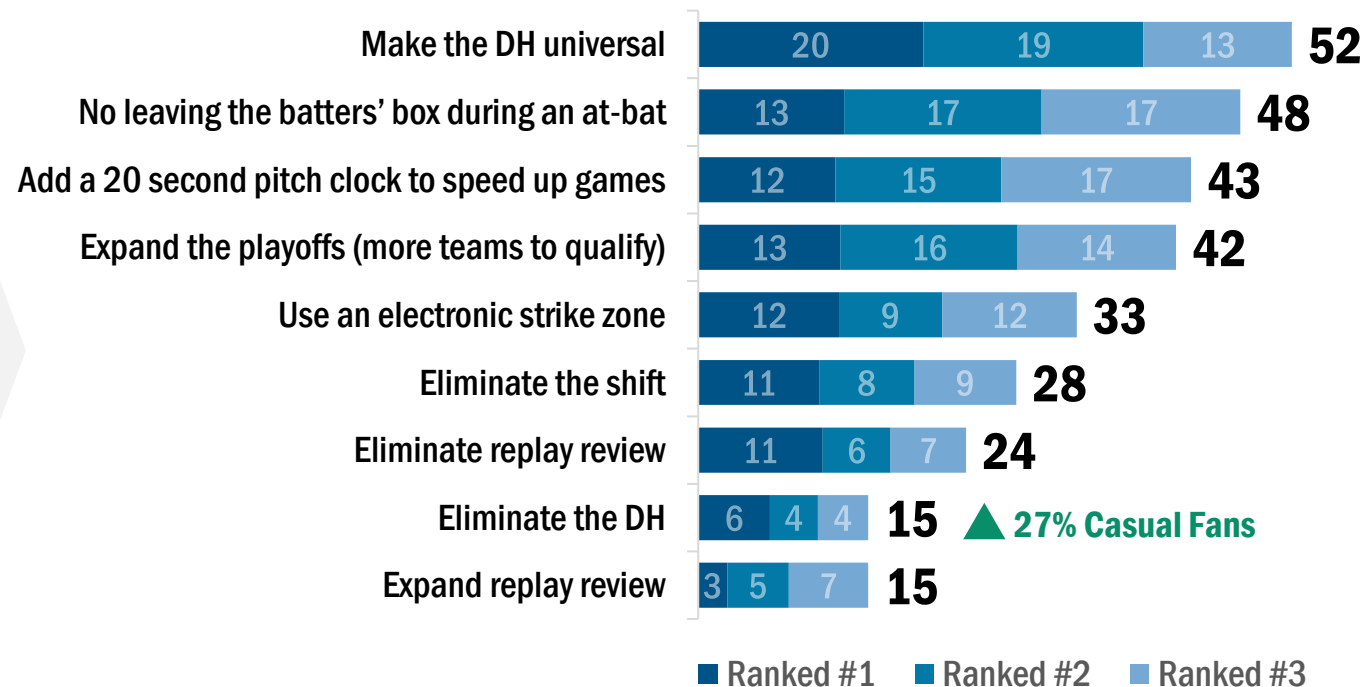
The Future of MLB Baseball: Just over half of respondents would like to see shorter games and designated hitters in the National League

1-in-2 fans feel that MLB games are “**too long**” and they need to make them shorter

51%

Most Wanted Changes in the MLB

% Selected (ranked in top 3), Total



Q.46 How do you feel about the amount of time it takes to play games in Major League Baseball?
Q.47 What are the top 3 things you would most like to see changed in Major League Baseball?
Base: Total (n=904)

▲ Indicates significantly higher vs. Total at 95% CI

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IMI

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