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

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**LOCATIONS**

**THOUGHT LEADERSHIP**

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

**NEXT WAVE**

**ABOUT US**

- 70 PEOPLE
- 100+ CLIENTS
- 45 COUNTRIES

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**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

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

Sample
Total n=904

Methodology
15-minute survey online

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

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

2. A Coronavirus Nightmare: Fans are missing their summertime sport

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

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

5. Fans want the future of baseball to look shorter, with more DH’s

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%).

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.

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.

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.

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% 15% 6% 12% 42% 20% 19%
Males Female 18-30 31-38 39-54 55-64 65+

37% 63% 7% 86% 5% 3%
Baseball Player Non-player West Ontario Quebec East

36% 64% 91% 8% 1%
Kids in HHLD <18 No Kids in HHLD Avid Fan Casual Fan Not MLB Fan

59% 41% 81% 19%
Kids Play Baseball (if Kids in HHLD) No Kids Play Baseball (if Kids in HHLD) Favourite Team Not Favourite Team

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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HHLD: Abbreviation for “Household”
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

<table>
<thead>
<tr>
<th>Companion</th>
<th>Selected (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>By myself</td>
<td>63</td>
</tr>
<tr>
<td>Partner/Spouse</td>
<td>44</td>
</tr>
<tr>
<td><em>My Child(ren)</em></td>
<td>57</td>
</tr>
<tr>
<td>Friends/Others</td>
<td>35</td>
</tr>
</tbody>
</table>

% Selected, Among Viewers of MLB baseball

### MLB Game Attendance Frequency

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Selected (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Season Ticket Holder</td>
<td>5</td>
</tr>
<tr>
<td>10+ Games Per Season</td>
<td>14</td>
</tr>
<tr>
<td>6-10 Games Per Season</td>
<td>18</td>
</tr>
<tr>
<td>3-5 Games Per Season</td>
<td>28</td>
</tr>
<tr>
<td>1-2 Games Per Season</td>
<td>27</td>
</tr>
<tr>
<td>Never Attend Games</td>
<td>7</td>
</tr>
</tbody>
</table>

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

55% of MLB-aware respondents typically attend 1-5 MLB games per season

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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)
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.

Q.15 What are the top 3 things that you like the most about baseball?

- Sport itself/Action/Gameplay - 16%
- Strategy/Complexity - 14%
- Slow Speed/Pace/Relaxing - 9%
- History/Tradition/Childhood Memories - 9%
- Fun/Drama/Entertainment - 7%
- Ambience/Atmosphere/Sounds/Smells - 5%
- Attending/Going to Ballpark - 5%
- Competition - 5%
- Athleticism/Skill/Talent - 5%

Q.16 And what are the top 3 things that you dislike the most about baseball?

- Delays/Pace/Length of game - 33%
- MLB/Owners/Business of sport - 10%
- Cost of food/access/tickets - 4%
- Players/Teams - 4%
- Bad Umpires/Calls - 3%
- Cheating/Bad sportsmanship - 3%
- New Rules/Attempts to change the game - 2%
- Pitching Changes - 2%
- Other fans - 2%

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.

<table>
<thead>
<tr>
<th>Currently Missing the Most About Baseball</th>
<th>% Selected (ranked in top 3), Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching the game on TV</td>
<td>20</td>
</tr>
<tr>
<td>The game itself</td>
<td>29</td>
</tr>
<tr>
<td>Watching/following my favourite team(s)</td>
<td>18</td>
</tr>
<tr>
<td>Going to the ballpark</td>
<td>14</td>
</tr>
<tr>
<td>*Watching my kids/grandkids play Little League</td>
<td>22</td>
</tr>
<tr>
<td>Listening to the game on the radio</td>
<td>8</td>
</tr>
<tr>
<td>Enjoying my ‘go-to’ food/drink while watching the game</td>
<td>23</td>
</tr>
</tbody>
</table>

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

*Among respondents With Children <18 in HHLD

▲ Indicates significantly higher vs. Total at 95% CI
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)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Rogers Centre in Toronto</td>
<td>25</td>
</tr>
<tr>
<td>#2</td>
<td>Fenway Park in Boston</td>
<td>23</td>
</tr>
<tr>
<td>#3</td>
<td>Wrigley Field in Chicago</td>
<td>18</td>
</tr>
<tr>
<td>#4</td>
<td>PNC Park in Pittsburgh</td>
<td>7</td>
</tr>
<tr>
<td>#5</td>
<td>Yankee Stadium in NYC</td>
<td>5</td>
</tr>
</tbody>
</table>

### 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

- **I don’t care, just get me to the ballpark!**: 32%
- **Down the baseline**: 32%
- **Behind home plate**: 24%
- **Upper deck**: 6%
- **The outfield**: 5%
- **Private box**: 2%

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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)

<table>
<thead>
<tr>
<th>Team</th>
<th>Favourite Team</th>
<th>Also a Fan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toronto Blue Jays</td>
<td>81</td>
<td>14</td>
</tr>
<tr>
<td>Detroit Tigers</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>Boston Red Sox</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Chicago Cubs</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>New York Yankees</td>
<td>12</td>
<td>16</td>
</tr>
</tbody>
</table>

Q.14. 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

- Yes: 59%
- No

**Most Valuable Lessons for Kids**
% Selected (ranked in top 3), Among those with Kids <18

- Teamwork: 89% (Ranked #1)
- Sportsmanship: 77% (Ranked #2)
- Work ethic: 54% (Ranked #3)
- Patience: 37% (Ranked #2)
- Resilience: 36% (Ranked #3)

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”.

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

<table>
<thead>
<tr>
<th>Favourite Baseball Movies</th>
<th>% Selected, Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field of Dreams</td>
<td>27</td>
</tr>
<tr>
<td>Bull Durham</td>
<td>15</td>
</tr>
<tr>
<td>Moneyball</td>
<td>14</td>
</tr>
<tr>
<td>A League of Their Own</td>
<td>10</td>
</tr>
<tr>
<td>Major League</td>
<td>10</td>
</tr>
<tr>
<td>The Sandlot</td>
<td>6</td>
</tr>
<tr>
<td>The Natural</td>
<td>6</td>
</tr>
<tr>
<td>Bad News Bears</td>
<td>2</td>
</tr>
</tbody>
</table>

- Indicates significantly higher vs. Total at 95% CI

Field of Dreams (1989)
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**
- **58%** Driving in the winning run with a walk off hit or home run
- **18%** Striking out the final batter
- **14%** Laying out in the outfield for a diving catch
- **6%** Turning a double play
- **4%** Catching a pop up

**Would most love to see in person**
- **61%** A perfect game
- **16%** A walk off grand slam
- **10%** A no hitter
- **7%** A batter hit for the cycle
- **6%** An inside-the-park home run

**Most fun type of baseball game**
- **49%** A tense, low-scoring pitchers’ duel
- **37%** A high-scoring slugfest
- **16%** A game that goes deep into extra innings
- **7%** A double header

**Most important on a team**
- **64** Good starting pitching
- **17** Good defense
- **13** Good offense
- **5** Good bullpen
- **1** Good speed

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)
The MLB Canadian Teams Hall of Fame According to passionate fans

### Best Canadian Baseball Mascot

1. Youppi (46%)
2. BJ Birdie (28%)
3. Ace (26%)

*Among aware of mascots*

- 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)

### All-Time Best Canadian Blue Jays Player

- Russell Martin (74%)
- Matt Stairs (12%)
- Paul Quantrill (11%)

### All-Time Best Expos Positional Player

- Vladimir Guerrero, Sr. (28%)
- Larry Walker (24%)
- Gary Carter (23%)
- Tim Raines (13%)
- Andre Dawson (11%)

### All-Time Best Blue Jays Positional Player

1. Roberto Alomar (68)
2. Tony Fernandez (10)
3. Carlos Delgado (7)

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

### All-Time Best Blue Jays Pitcher

1. Roy Halladay (63)
2. Dave Stieb (28)
3. Tom Henke (3)

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

### All-Time Best Expos Pitcher

1. Pedro Martinez (58)
2. Dennis Martinez (20)
3. Steve Rogers (19)
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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Moment</th>
<th>% Selected (ranked in top 3), Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Joe Carter’s walk-off homer in 1993 for back-to-back World Series titles</td>
<td>42 37 10 89</td>
</tr>
<tr>
<td>#2</td>
<td>Blue Jays beat the Braves in Game 6 in Atlanta in 1992 (first Canadian team to win World Series)</td>
<td>29 26 22 78</td>
</tr>
<tr>
<td>#3</td>
<td>Jose Bautista’s Bat Flip Home Run against Texas in 2015</td>
<td>14 18 29 60</td>
</tr>
</tbody>
</table>

Baseball Records That Fans Think Will Never Broken

<table>
<thead>
<tr>
<th>Record</th>
<th>% Selected, Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cal Ripken Jr.’s 2632 consecutive games</td>
<td>70</td>
</tr>
<tr>
<td>Joe DiMaggio’s 56 game hit streak</td>
<td>37</td>
</tr>
<tr>
<td>Dave Stieb’s three one-hitters in four starts</td>
<td>17</td>
</tr>
<tr>
<td>Blue Jays’ 10 home runs in one game</td>
<td>8</td>
</tr>
</tbody>
</table>

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)
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

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)

<table>
<thead>
<tr>
<th>Change in MLB</th>
<th>% Selected (ranked in top 3), Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make the DH universal</td>
<td>20 (13) 19 (17) 13 (17) 52</td>
</tr>
<tr>
<td>No leaving the batters’ box during an at-bat</td>
<td>13 (17) 12 (17) 15 (17) 48</td>
</tr>
<tr>
<td>Add a 20 second pitch clock to speed up games</td>
<td>12 (17) 12 (17) 16 (14) 43</td>
</tr>
<tr>
<td>Expand the playoffs (more teams to qualify)</td>
<td>13 (14) 12 (14) 16 (12) 42</td>
</tr>
<tr>
<td>Use an electronic strike zone</td>
<td>12 (12) 11 (9) 12 (12) 33</td>
</tr>
<tr>
<td>Eliminate the shift</td>
<td>11 (9) 11 (8) 9 (9) 28</td>
</tr>
<tr>
<td>Eliminate replay review</td>
<td>11 (7) 11 (6) 6 (7) 24</td>
</tr>
<tr>
<td>Eliminate the DH</td>
<td>6 (4) 6 (4) 4 (4) 15</td>
</tr>
<tr>
<td>Expand replay review</td>
<td>3 (4) 5 (7) 5 (7) 15</td>
</tr>
</tbody>
</table>

▲ Indicates significantly higher vs. Total at 95% CI

27% Casual Fans