



Fan Research Results





Thank you to all of our fans who participated in the research over the past season. The information you provided was very informative and we expect to implement many initiatives over the next year that are based on your feedback.

We value your input and we'll be looking for more in the future. We believe that research is a tool that will provide us information that will enable us to improve your experience as fans and ticket purchasers of the club

Attached is a summary of the feedback you gave us last season (in October 2009 and April 2010). Should you have any questions please don't hesitate to contact your service line at 905 547 2287.

Thanks For Being A Fan

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October 2009 Study - Fan Demographics





Fan Profile: Season Seat Holders & Casual Ticket Buyers

- The Fan Survey completed in **October 2009** included 1,426 respondents inclusive of season seat holders, casual game purchasers. Method of collection was via email and at Ivor Wynne Stadium on gameday.
- Results conclude:
 - The average age of Ticats Season Seat Holders (SSH's) is 50 years old with 60% of them between the ages of 46 and 64
 - 82% Male
 - 18% Female
- 50% of SSH's share their season seats, with 62% indicating they share with family
- Season Seat Holders attend an average of 9 games per season.
- 80% of SSH's primarily attend games with family, 15% with business acquaintances or clients
- 66% of SSH's have kids and the children attend an average of 4 games per season
- Single game ticket purchasers attend an average of four games per season, watch an average of eight games on television per season, and attend an average of six sporting events per year
- When coming with another person, the majority of single ticket purchasers will attend with their family members.
 - 64% Family
 - 32% Friends
 - 2% Colleagues or clients

2010

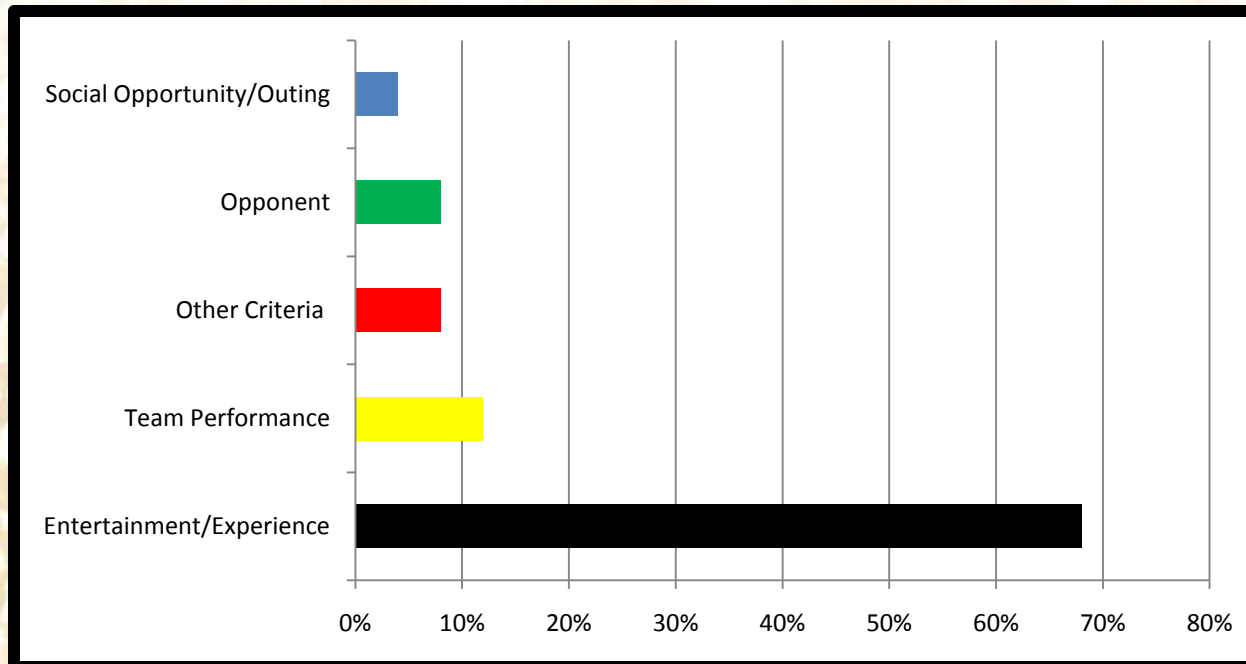
Fan Attendance Motivation

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Fan Profile: Season Seat Holders & Casual Ticket Buyers

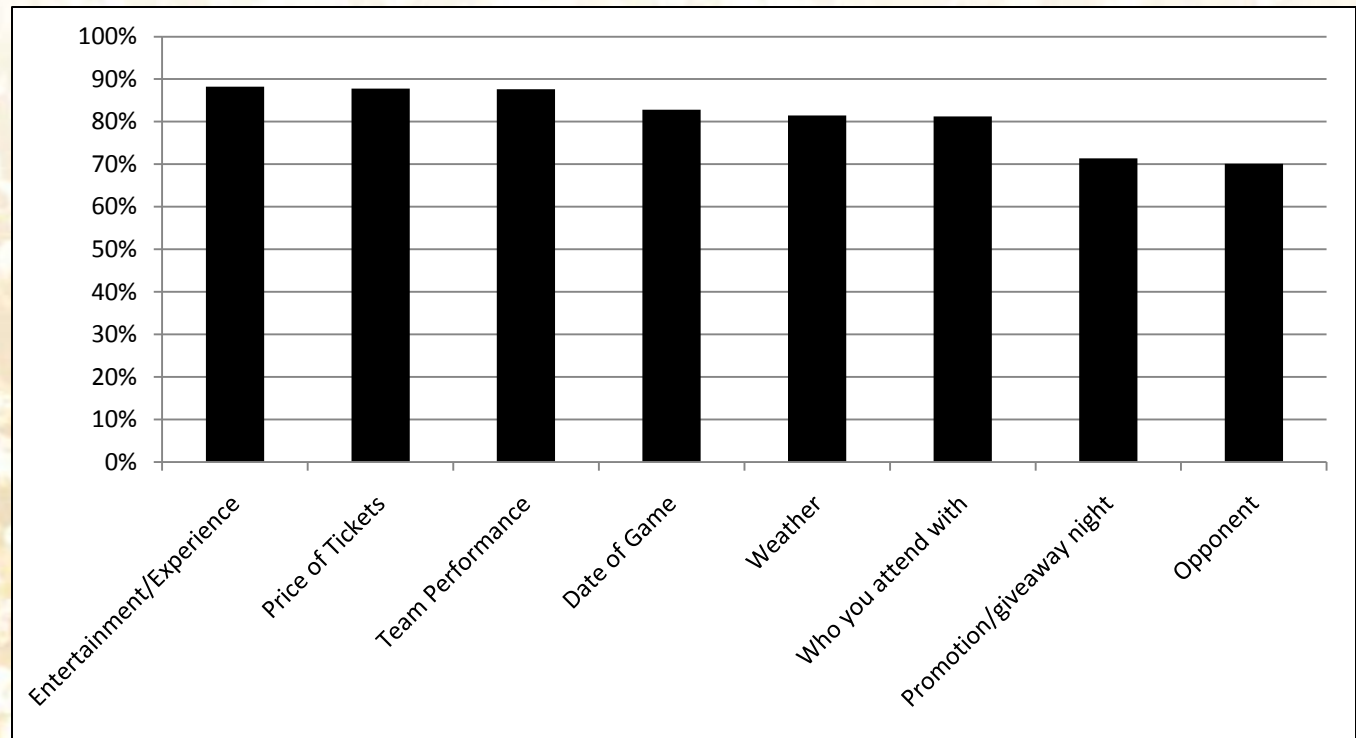
- Tiger-Cats ticket purchasers were asked to indicate their primary motivation or influence when making the decision to purchase game tickets





Fan Profile: Season Seat Holders & Casual Ticket Buyers

- Tiger-Cats ticket purchasers were asked to rate how the following factors influence a fans decision to purchase tickets and attend a game
- Of the almost 1,500 respondents 88% indicated entertainment/experience, price of tickets and team performance were significant factors influencing their decision to attend a game



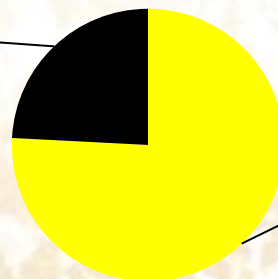


Fan Profile: Where Do Fans Come From?

Season Seat Holders (SSH's) – Drive To IWS

- 76% of SSH's come from the Greater Hamilton Area (GHA), defined as a 30 minute or less drive from IWS
- 24% of SSH's come from outside the GHA, or further then 30 minutes from IWS

Outside GHA -
More than 30
minutes
24%



GHA -
30 minutes or less
76%

Single Game Ticket Buyers – Drive To IWS

- 46% of single game ticket buyers come from the (GHA), 54% from outside the GHA

Outside GHA
More than 30
minutes
54%

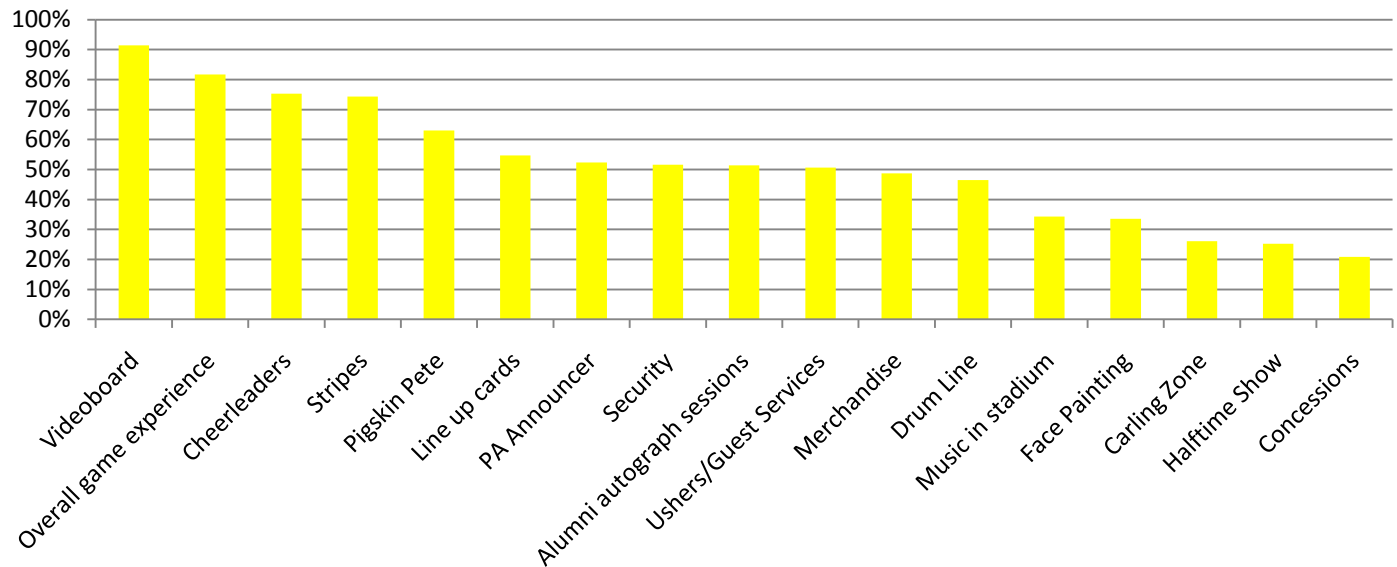


GHA
30 minutes or less
46%



Fan Profile: All Fans At Ivor Wynne Stadium (IWS)

- The Tiger-Cats executed an in-stadium fan research program for multiple games during the 2009 season. Key results included:
 - The average age of a fan in IWS is 43 years old, with 46% between ages 26-45
 - 66% Male & 34% Female
- In-stadium attendees surveyed attend an average of five (5) Tiger-Cats games per season
- 59% of in-stadium attendees live within a 30 minute drive of Ivor Wynne Stadium and 41% live greater than a 30 minute drive
- Fans were asked to rate various game experience elements on a scale of Zero (not satisfied at all) to 10 (completely satisfied). Results include





October 2009 Fan Survey

- SSH's were asked to rate the importance of six factors that influence their decision to purchase tickets at a new stadium in the survey administered in **October 2009**
- Please note this question was included amongst a larger survey executed by the Tiger-Cats and was distributed before the West Harbour was recommended by the City as the best location for the Pan Am Stadium

Season Seat Holders	Single Ticket Purchasers
1. Parking	1. Quality of In-stadium food service
2. Highway Access	2. Parking
3. In-stadium restaurant	3. Highway access
4. Tailgating zone	4. Tailgating zone
5. Family zone	5. City transit links
6. City transit links	6. Family zone



April 2010 New Stadium Survey - Results

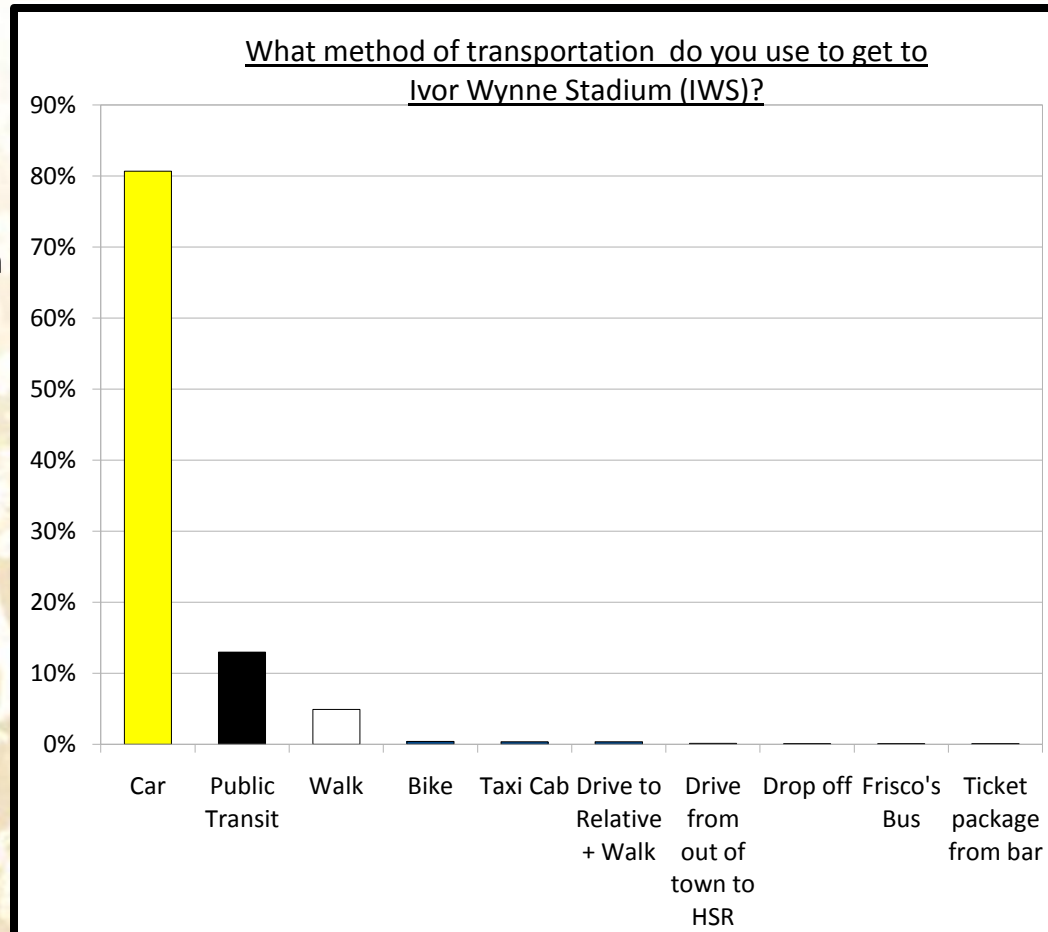


April 2010 Stadium Survey Results

- The Tiger-Cats April 2010 stadium related fan survey had a total of 1,500 respondents:
 - 1,000 SSH's
 - 500 Single Game Ticket Buyers

• For the purposes of this analysis, responses from both fan segments have been blended together

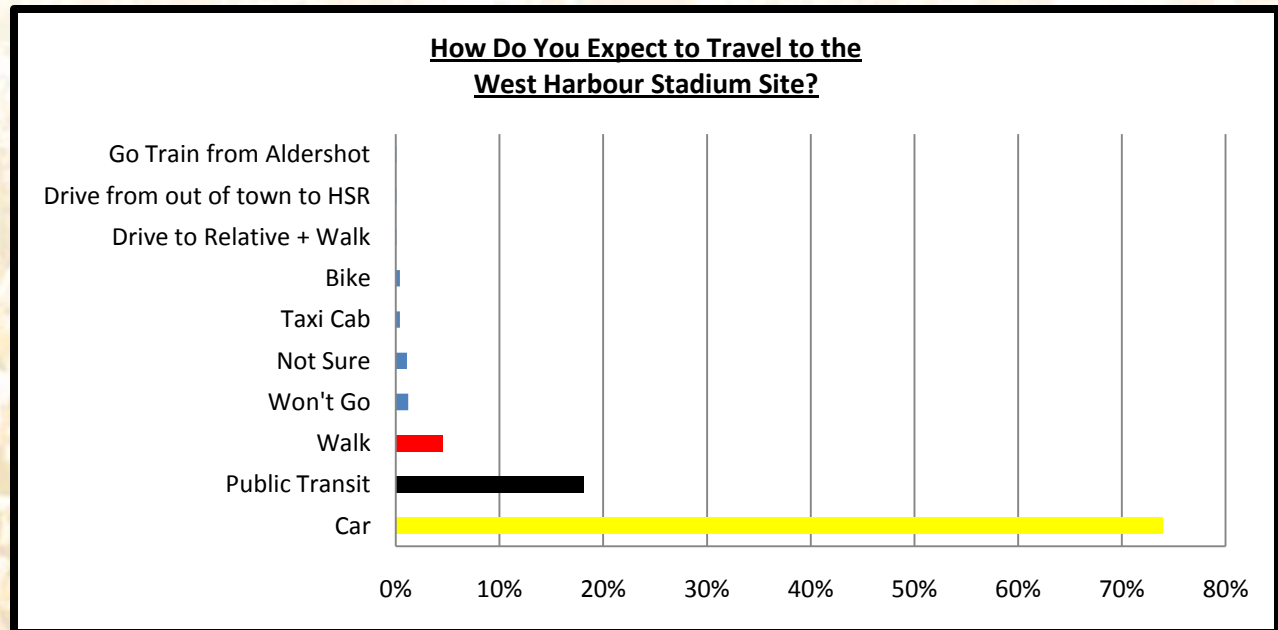
• 81% of fans currently drive to IWS, 13% take some form of public transit, 5% walk





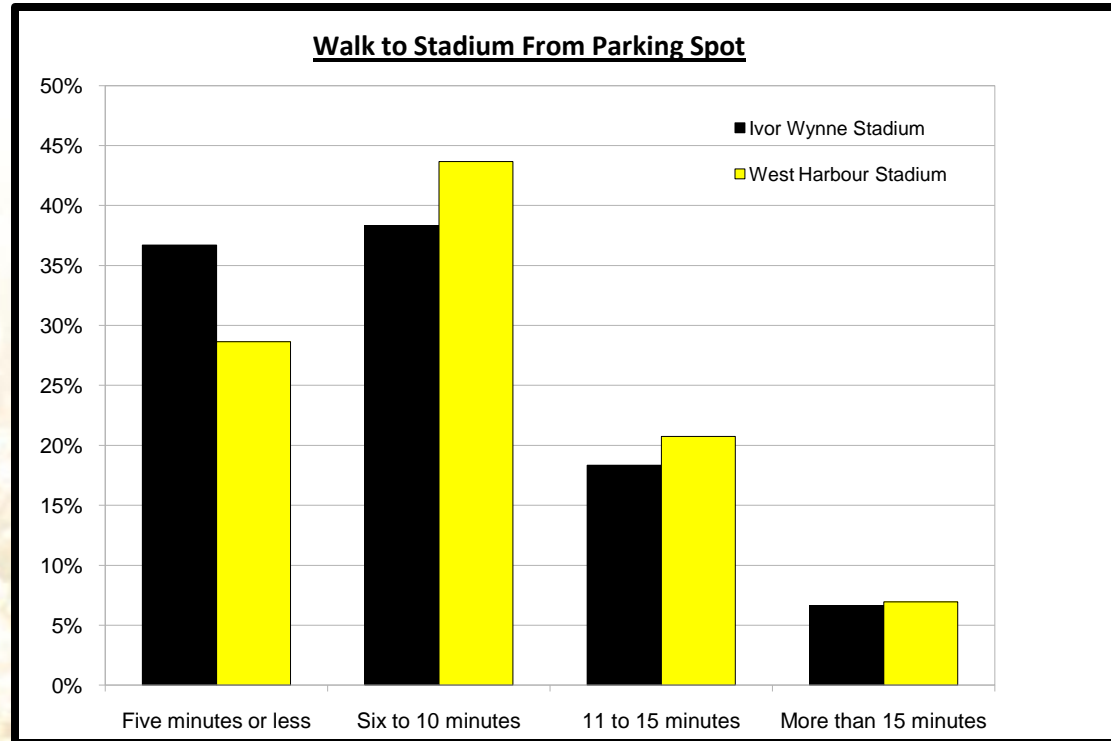
April 2010 Stadium Survey Results

- When asked their intended mode of travel to the recommended West Harbour stadium site, Tiger-Cats fans overwhelmingly indicated cars (74%) followed by public transit (18%) and walking (5%)





April 2010 Stadium Survey Results



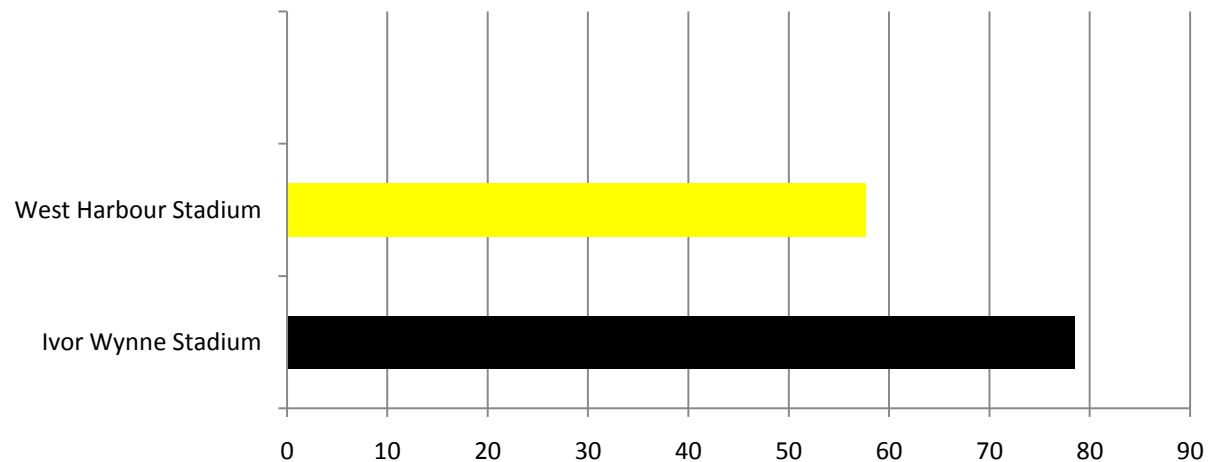
- Results below depict walking distances from parking spots to the stadium. Black indicates existing walk times to IWS, yellow indicates the expected distance from parking spot to the West Harbour stadium
- Both evaluations indicate 93% of fans either walk less than 15 minutes from their spots to IWS currently, or expect this distance at the West Harbour



April 2010 Stadium Survey Results

- Fans were asked to rate their overall satisfaction with their parking experience at IWS and given what they know about the WH site, what they anticipate their satisfaction would be with parking at the WH site
- The scale by definition concludes that a “1” would be a totally dissatisfied experience and “10” would be a totally satisfied experience
- Results indicate that the average score for IWS is a 78.5% satisfied and the average for the West Harbour is 57.7% satisfied

Parking Experience Satisfaction Scores

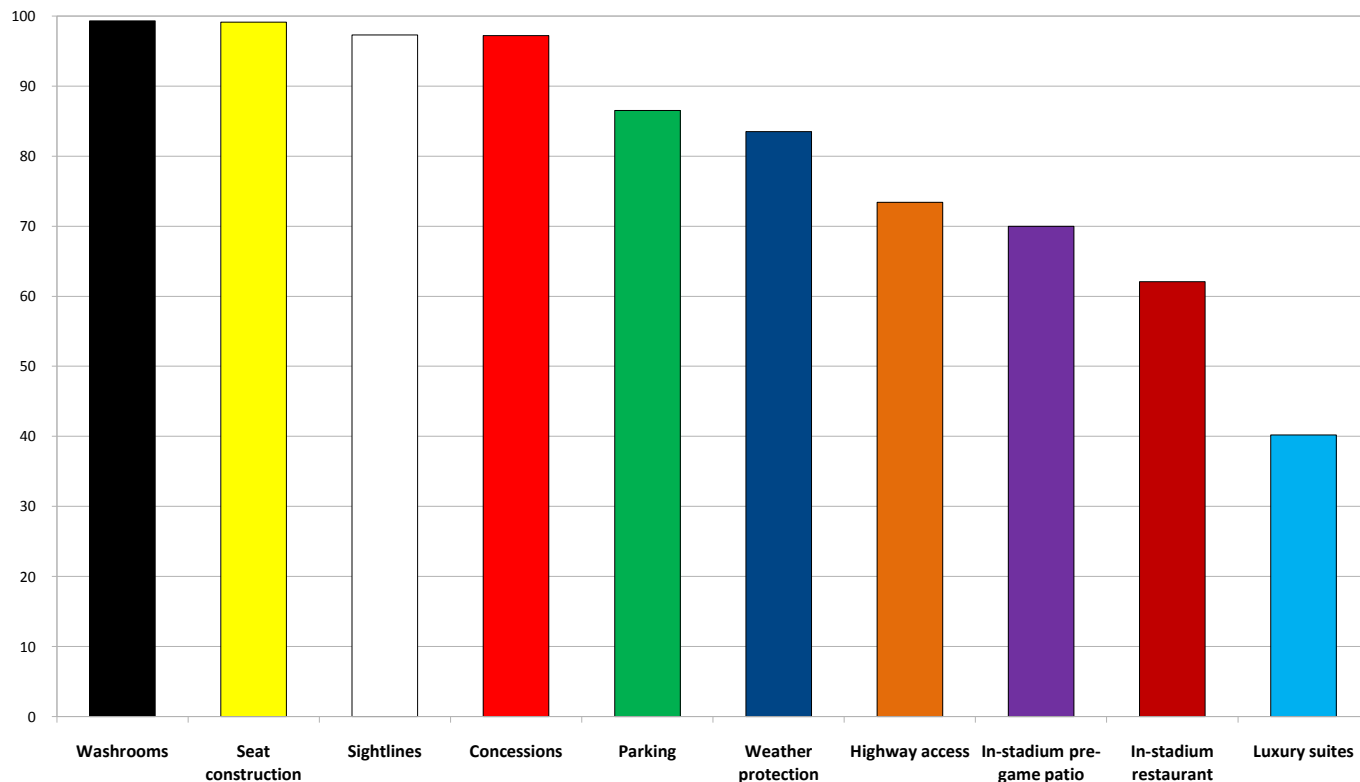




April 2010 Stadium Survey Results

- Fans were asked to rate the importance of certain factors to be incorporated into the new stadium in the April 2010 stadium survey
- The scale by definition concludes that a “1” would not be important and “10” would be the most important

Importance of the following amenities at the new stadium.



April 2010 Stadium Survey Results

Other Survey Findings

- The stadium survey concluded with an open-ended question for any additional comments from Tiger-Cats ticket purchasers. **81% of survey respondents** chose to leave additional comments, which were classified based on their specific nature and summarized as follows:

Stadium Amenities – Additional Comments

- 27% of respondents commented on design/construction related amenities like sightlines, washrooms, concourse size, weather protection and food service
- 19% commented on the need for easy vehicular access as well as parking lots on-site at the stadium, to be used for parking and/or pre-game events

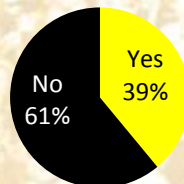
Stadium Location – Additional Comments

- 14% provided support for an alternative site for the stadium – In order of frequency of response: Confederation Park, Airport and Lafarge Site
- 9% of total comments specifically voiced support for the West Harbour site location
- 3% indicated a desire to stay at IWS
- 2% said they will attend regardless of location

Other Survey Findings

- The survey asked fans if they would use the GO train if service took them directly to the West Harbour stadium site:

Season Seat Holders



Single Game Ticket Purchasers

