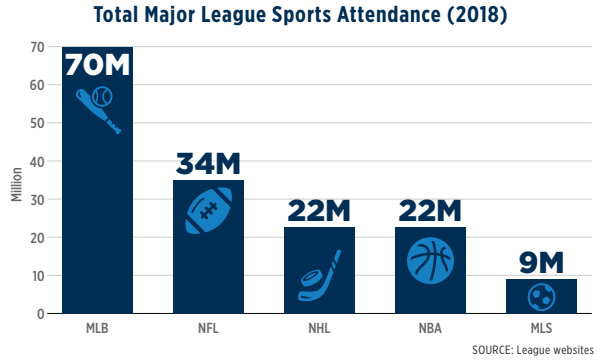


THE IMPACT OF SPORTS ON THE TRAVEL INDUSTRY



OVERVIEW

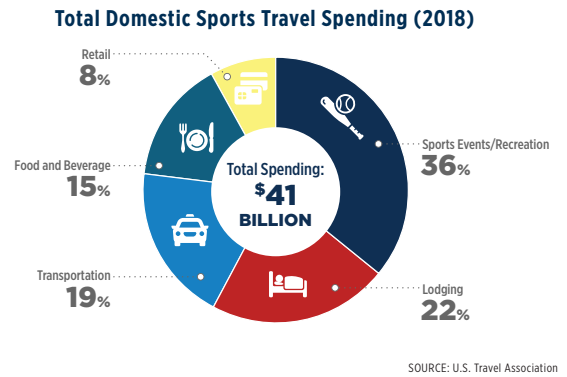
- The North American sports market (United States, Canada and Mexico) totaled **\$71.1 billion** in 2018 and will **grow 3.2% annually, reaching \$83.1 billion** in 2023. *Source: PwC*
- More than **150 million** individuals attended professional sporting events in 2018 across the five major sports leagues.



SPORTS TRAVEL IMPACT: DOMESTIC

And it's not just locals attending sporting events. Whether it's to cheer on your alma mater in the NCAA tournament, attend a large-scale event such as the Super Bowl, soak up some sunshine and baseball during spring training in Arizona and Florida or even travel to your child's soccer tournament, sports and travel are connected.

- In 2018, **sports travel¹ made up 8% of the total domestic travel market, resulting in 190 million domestic trips** to attend or participate in a sporting event.
 - On average, sports travelers spend 3.9 nights in a destination.
 - The average party size for sports travelers was 3.2 people – slightly larger than for leisure travelers overall.
 - Nearly half (47%) of sports travelers bring children on their trips.
 - 10% of sports travelers are first-time visitors.
 - One-quarter of sports travelers included a flight on their travels – slightly higher than leisure travelers overall.
- Travelers attending or participating in a sporting event spent an impressive \$41 billion in 2018.**



1. Includes attending or participating in any sporting event/tournament.

SPORTS TRAVEL IMPACT: INTERNATIONAL

There is also growing demand from international travelers to attend sporting events to take part in an iconic American experience.

In 2018, the United States welcomed 80 million international visitors. These visitors stay on average 17.5 nights in the United States, visiting 1.4 states per visit. Repeat visitors in particular are interested in exploring beyond the gateway cities along the coasts and seeing more of the United States.

International travelers average spending was \$2,500 in 2018, nearly three times more than the \$900 domestic travelers average on a trip.

Top Destinations Visited by Overseas* Travelers (2018)

RANK	CITY (MSA/MD)**
1	New York-White Plains-Wayne, NY-NJ
2	Miami-Miami Beach-Kendall, FL
3	Los Angeles-Long Beach-Glendale, CA
4	Orlando-Kissimmee-Sanford, FL
5	San Francisco-San Mateo-Redwood City, CA
6	Las Vegas-Paradise, NV
7	Honolulu, HI
8	Washington (D.C. Metro Area), DC-MD-VA
9	Boston-Quincy, MA
10	Chicago-Joliet-Naperville, IL



* Excludes Canada and Mexico
 All metro areas with a minimum 0.10% market share and minimum sample size of 100 are listed.
 ** City names correspond to U.S. Bureau of Census. Metropolitan Statistical Area (MSA) or Metropolitan Division (MD).
 SOURCE: U.S. Department of Commerce

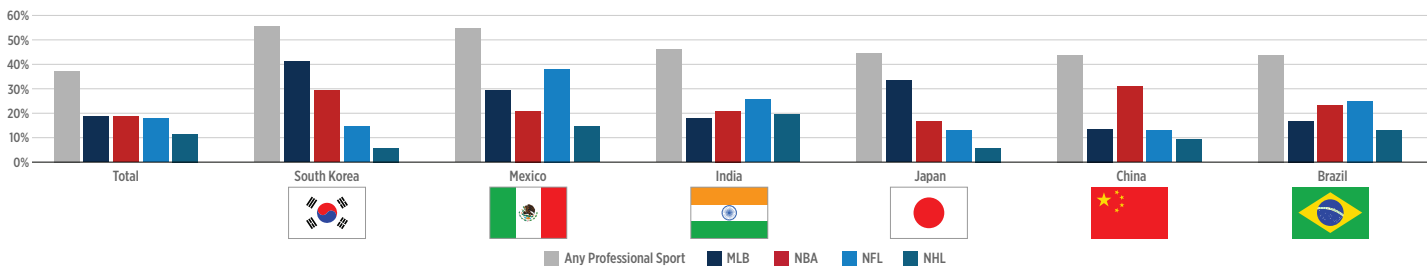
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• Nearly 4 in 10 (37%) international travelers indicated that they were interested in an NBA, NFL or MLB experience when visiting the U.S. in 2019, up from 24% in 2018. This translates into nearly 30 million visitors.

- More than half of South Koreans and Mexicans are interested in attending a sports game.

International Travelers Interest in Professional Sports (2019)



SOURCE: Destination Analysts

- Many sports leagues are promoting themselves internationally to spur new demand and tap into new fanbases across the globe. Destinations are looking at this increased growth as an opportunity to attract new travelers to their markets.

Top International Source Markets (2018)

Country	International Arrivals to the U.S. (millions)
All Countries	79.6
Canada	21.2
Mexico	18.5
United Kingdom	4.7
Japan	3.5
China	3.0
South Korea	2.2
Brazil	2.2
Germany	2.1
France	1.8
India	1.4
Australia	1.4
Italy	1.1
Argentina	1.0

SOURCE: U.S. Department of Commerce

..... MLS

- Of the total 628 MLS players across 24 teams, more than half (55%) were foreign-born in the 2019 season.
- Top countries represented: Canada, Argentina, Brazil, Colombia, Ghana, France, Costa Rica and Venezuela.

..... MLB

- A record-high 29% of MLB players were foreign-born, spanning 21 countries.

..... NHL

- Canada contributes the highest number of NHL players to teams' roster, with 44% of the total, followed by the U.S., Sweden and Russia.

..... NBA

- The NBA now has over 100 international players on rosters, representing 42 countries.
- According to the Chinese Basketball Association, more than 300 million Chinese play basketball.
- Basketball is set to become the next soccer and is experiencing its largest growth in Australia, Italy, China, Russia, Vietnam, South Africa and India.

NBA International Players by Country (2018)

Canada	11%	Senegal	1%
France	9%	Sweden	1%
Spain	7%	Tunisia	1%
Australia	1%	United Kingdom	1%
Republic of the Congo	1%		
Russia	1%	TOTAL	104

SOURCE: National Basketball League

DOMESTIC COMPETITIVE YOUTH SPORTS

And it's not just major league sports in large cities. Domestically, with the rise of competitive youth sports, families across America are increasingly combining their vacations with their children's sports events, resulting in "tournacations".

- The U.S. youth-sports economy—including travel, equipment, team membership, facility rentals, etc.—was a \$17 billion market in 2018 and has increased by 55% since 2010. *Source: WinterGreen Research*
- In 2018, 2% of domestic leisure trips included participation or attendance in a youth sporting event. *Source: Longwoods International*