
SENATORS SPORTS & ENTERTAINMENT 2012/2013 IMPACT STUDY

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This report represents the summary findings of a series of studies completed between September 2012 and July 2013.

AUTHORS AND CONTRIBUTORS

This report and the various research studies and student projects that enabled it, required the contribution of a number of individuals, who took on varying roles. These individuals are acknowledged here.

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The research was conducted under Ethics Approval at the University of Ottawa and independently from the Senators Sports & Entertainment (SSE) organization. SSE took the role of an active research partner, contributing data, supporting analysis and providing input.

LIMITATIONS

Any report of this nature requires clear articulation of its limitations. In this case, the data upon which the estimates of income are made are normally primary in nature but in some cases may be limited in their scope, sampling or quality. In all cases, conservative estimates were taken and reasonable assumptions made. In situations where secondary data is employed, its source and issues are reported in those results, with conservative assumptions and estimates again taken by the researchers. Given the nature of the data collection, the limited resources available and access to data, a margin of error must be considered for all reported data.

ABSTRACT

Over the past year, a team of professors and students has worked with Senators Sports & Entertainment (SSE) on an extensive data collection process towards estimating the value of the organization to the Ottawa-Gatineau region. The study has taken an academic and conservative approach to estimating the economic, sport, community and social benefits of SSE. The NHL lockout slowed the process but data collection is complete and results are final. Specifically, three professors, industry experts, and more than 100 graduate and undergraduate students have invested their time into this research. It is estimated that approximately 2450 hours of person research hours was invested in this project, plus the support of SSE staff, key partners in the community (e.g., United Way), and the hundreds of people who completed surveys, participated in interviews and took part in focus groups.

The methodology followed a conceptual model based on previous studies and related literature, resulting in an impact model. The model articulates all potential direct, indirect and intangible impacts of more than 200 different possible sources, including surveys, focus groups, and events hosted at (the former) Scotiabank Place and Bell Sensplex, the Bell Capital Cup and other hosted tournaments, concerts, major events (e.g., 2013 IIHF Women's World Ice Hockey Championships, NHL All-Star Game, etc.), the Ottawa Senators, the Ottawa Senators Foundation, Rink of Dreams, Rogers House, and others. Results emphasize that SSE and their assets economic ***have considerable*** financial, sport, community and infrastructure impacts on the Ottawa-Gatineau CMA.

SECTION 1: INTRODUCTION & BACKGROUND

This research seeks to estimate the impact of a professional sports club on its local market. Specifically, it builds a model that outlines the economic and non-economic potential outcomes possible for a professional sports club in its home market. The research grew from the need of a professional sport club to articulate the value of their organization to the region in which the club operates both annually and over the 20-plus year history. In recent years, this topic has become a top priority for the management of professional sport clubs in many markets. The rationales for such an interest are multi-faceted, with the goal of displaying the most accurate depiction of why the impact of a professional sport organization is important to the individual market.

Previous research and practice has often adopted economic impact studies to undertake this assessment (Preuss, Seguin, & O'Reilly, 2007), however some of these studies have come under scrutiny for over-estimation and the mis-use of multiplier effects (Crompton, 1995), while others note the limited economic impact from certain events (Gratton et al., 2000). The current research seeks to overcome the problems associated with over-estimation by (i) always adopting the most conservative assumptions, (ii) using industry standards for multiplier effects, (iii) not including multipliers when their validity is suspect, and (iv) focusing on non-economic impacts as well as economic ones. Further, attention to non-economic factors such as intangible impacts and sport outcome are not normally considered. Thus, this research proposes a view of 'impact' that includes a conservative view of the traditional economic impact, but also considers the community development based impacts, as well as the sport-related impacts. It is believed that such an approach provides for a more realistic, holistic and broad assessment of impact.

1.1 LITERATURE REVIEW

Economists and market researchers are commonly performing cost/benefit analyses of teams, individual activities, sporting events and public expenditures on sport, however such studies often over-estimate economic impact (Swindell & Rosentraub 1998). In periods of economic recession and government cutbacks – such as the present - there is typically an increased focus on the economic contribution of sport at both the Olympic and the professional level. This is accompanied by a focus on strategies to stimulate tourism and arguments for more complex economic modeling in sport (Ahlert, 2000). As a result, assessments of economic impact and research have become common in the literature where studies assess the impact of a single mega-event (e.g., Kasimati, 2003) such as the Olympic Games or the Super Bowl, a professional sport team or a facility. Although the results of such studies are often used in policy making and decisions on funding, there is debate in the literature as to their value in this regard and

the soundness of methods used study-to-study (Crompton, 1995). Crompton (1995) specifically notes that he supports the use of impact studies in decision making but only if implemented properly and with integrity.

Recent media coverage of the international events in Canada and analyses of their economic impact points to the flaws often found in the methodologies used (see Gillespie, 2013). In particular, these studies are reported to highlight many of the issues cited in the literature. This information is provided not as a slight to any particular organization but merely to emphasize the variability in economic impacts measures and the importance of recognizing only impacts that come from outside of the local market.

An important aspect of the current study is about community development impacts. Community development is about improving the community landscape economically, socially, culturally or environmentally (Schulenkorf, 2012). This is often accomplished through the strategy of corporate social responsibility (CSR), where organizations give to their community in tangible ways, such as via the provision of resources, through the creation of programs and/or by supporting the construction of infrastructure, as well as through providing benefits in intangible ways such as improved reputation and consumer loyalty (Babiak & Wolfe, 2009, & Anguinis & Glavas, 2012). A relevant out come of community development for this study is fan development, which is often an expected result of CSR in the sport context where organizations get involved in community development projects in order to build goodwill for their organization in the form of fan loyalty.

1.2 STUDY CONTEXT: SENATORS SPORTS & ENTERTAINMENT

The Ottawa-Gatineau region has been the home to the Ottawa Senators of the National Hockey League (NHL) since they were officially awarded an expansion franchise in 1991 (Firestone, 2007). The expansion plans were championed by a group of local businessmen led by eventual team owner Bruce Firestone and executives Cyril Leader and Randy Sexton (Scanlan, 2011). The franchise began playing out of the Ottawa Civic Centre during the 1992 season while their future home in Kanata was being developed (Firestone, 2007). The Senators moved to their home in suburban Ottawa in 1996, an arena first known as the Palladium (Crothers, 1996), later becoming the Corel Centre, then Scotiabank Place and, today, the Canadian Tire Centre. Although the team's performance was typically poor during their first couple of seasons, they eventually turned things around and have become a consistent playoff contender over the past decade, having qualified for the playoffs in 14 of the past 16 seasons.

According to some reports, the team has had a tremendous impact on the local economy, generating a reported 100M annually (Scanlan, 2011). The team also has a charitable arm known as the Ottawa Senators Foundation, which involves current and former players in a

variety of community events and initiative (Senators Sports & Entertainment & Ottawa Senators Foundation, n.d.). This organization has invested millions of dollars back into the Ottawa region (Senators Sports & Entertainment & Ottawa Senators Foundation, n.d.). Indeed, it is hard to question that the team – as the only major professional sport league franchise in the city – is the most important sport or entertainment entity in the region.

In 2014, the sport landscape in Ottawa is changing with the addition of new professional and semi-professional sport franchises. The Canadian Football League (CFL), North American Soccer League (NASL), and National Basketball League of Canada (NBL Canada) have all recently awarded Ottawa with expansion franchises that began play in 2013 or are scheduled to begin play in 2014. This will lead to a considerably different sport landscape in the city. Furthermore, the possibility of a minor league baseball team returning to the Ottawa market remains prominent in the near future. These teams would compete with the Ottawa Senators of the National Hockey League (NHL), along with the major junior hockey clubs currently operating in the CMA: the Ottawa 67's and the Gatineau Olympiques.

In addition to the Senators NHL club and the foundation, SSE also owns and manages the Canadian Tire Centre, a 20,500 seat sports and entertainment venue where the Senators play their home games. SSE hosts concerts and other major sporting events at the facility. SSE also manages two Sensplex facilities, with a third scheduled to open in 2014. These community arenas are a hub for hockey and skating activity in the community. SSE also built the well-known outdoor 'Rink of Dreams' in downtown Ottawa, which is now operated by the City of Ottawa. Each of these are included in the consideration of the impact of SSE.

1.2.1 STUDY CONTEXT: HISTORY OF THE OTTAWA SENATORS NHL CLUB

The Ottawa Senators were one of the founding members of the NHL, and took part in the inaugural season in 1917-1918. The team found great success in its early days, winning the Stanley Cup 11 times before 1934. About this time, the NHL began to expand into the southern United States, at this time the Senators were struggling financially and the owners were forced to sell the team to St. Louis, where after just one year in competition (1934-1935 season) in St. Louis the team folded.

After a 58-year hiatus from the NHL, the Senators franchise was considered for revival and a return to Ottawa as part of an expansion of the NHL planned for 1992. A prospective ownership group led by three men, Bruce Firestone, Cyril Leeder and Randy Sexton, were sure that Ottawa would be able to support a NHL franchise once again. They launched a "Bring Back the Senators" campaign where they achieved considerable public support for the return of the team. At the time, Ottawa was building a reputation as "Silicon Valley North" as its high tech sector was booming, along with the stable economy provided as Canada's capital city.

Following a competitive bid process, Ottawa was awarded the Senators franchise in 1990. The Senators returned to the NHL in the 1992-1993 season and struggled on the ice for the first four seasons in the league. The Senators reached the playoffs for the first time in 1996-1997, and have qualified for the post season in 14 of the 16 seasons since. The Senators played their first three and a half seasons in the Ottawa Civic Centre, until January 1996 when the Corel Centre (initially dubbed the Palladium, then Scotiabank Place and now Canadian Tire Centre) was ready to house the team. The arena - with a capacity of 19,153 for hockey - is located in Kanata, Ontario approximately 30 minutes to the east of the city centre.

Following its first season, Rod Bryden took over as sole owner of the club. Then, about a decade later, the ownership of the franchise changed again, when on August 26, 2003, Eugene Melnyk became the sole owner of the club. Today, he remains Owner, Governor and Chairman of the Ottawa Senators and SSE. It is widely supported that Melnyk is a community-focussed owner who is dedicated to creating a successful team on and off the ice. Melnyk supports the many community endeavours that the hockey club is involved in, including Roger's House in Ottawa, Ontario, a palliative care facility for children and their families at CHEO (Children's Hospital of Eastern Ontario).

The Ottawa Senators Foundation, the charitable arm of SSE, was founded in 1998 with the clear responsibility to foster community development through community partnerships and charitable fundraising events. These events raise funds to keep community projects, such as Roger's House, functioning. The foundation's current mission states that: "The Ottawa Senators Foundation empowers children and youth to reach their full potential by investing in social recreation and educational programs that promote both physical and mental wellness". Further details on the Foundation and its list of events and projects are found at Appendix A.

1.3 STUDY CONTEXT: OTTAWA-GATINEAU CENSUS METROPOLITAN AREA

The Census Metropolitan Area (CMA) of Ottawa-Gatineau is Canada's 4th largest CMA and is the focus of this study. Per the recommendation of established sport finance experts, it is "the geographic area of impact is an important characteristic of the analysis and should be determined early in the study" (Brown et al., 2010). Thus, we are establishing the unit of analysis for this study as the Ottawa-Gatineau CMA, whereby impacts in and out of the CMA are considered whereas those movements within the CMA are not. Specifically, as the unit of analysis, this infers that flows of resources or messaging is only 'counted' in the impact of SSE on its CMA while flows within the CMA are not counted. For example, a family of four traveling to Ottawa to watch a concert would be considered an impact, while a pair of friends from Kanata heading to a Senators game would not. Although we recognize that some studies focus specifically on the local area (e.g., facility) where most spending occurs (Hodur & Leistriz,

2006), this research adopts the aforementioned accepted approach for analyzing ‘true’ economic impact using the CMA of the given city (Brown et al., 2010).

According to Statistics Canada, a CMA is an area consisting of one or more adjacent municipalities situated around a major urban core with a population of at least 100,000 around an urban core of at least 50,000 people (Turcotte, 2008). Ottawa-Gatineau follows, Toronto, Montreal and Vancouver, as Canada’s 4th largest CMA, just slightly larger than the Calgary and Edmonton CMAs. An important component of a CMA is that it does contain an urban core of at least 50,000, signifying that there is a ‘city’ element to any CMA.

The selection of the Ottawa-Gatineau CMA as the study unit is supported for three additional reasons. First, per Grieve and Sherry’s (2012) view that a community is very hard to define, it is appropriate to look at the geographic focus of the organization. A review of SSE’s value statement about community, that notes a goal to “inspire and unite the entire Ottawa-Gatineau region as one ‘Sens Army’”, the fact that the organization is focused on this market supports its use as unit of analysis for this study. Second, the fact that most demographic data is provided by Statistics Canada based on CMA will allow for better analysis and accessibility of information. Third, in line with a conservative and realistic approach, a very small unit of analysis will often overestimate impacts to a region from a given activity, event or property (Brown et al., 2010). Thus, using the CMA as opposed to the City of Ottawa or the area (former city) of Kanata is appropriate and more realistic.

1.4 STUDY CONTEXT: OTTAWA-GATINEAU DEMOGRAPHICS AND GEOGRAPHY

The Ottawa-Gatineau CMA is the fourth largest CMA in Canada with a population of 1,236,234 (StatsCan, 2012a). The CMA covers 6,287.03 square kilometers. It is represented by the map below.



Over the years of its study, MoneySense magazine has regularly rated Ottawa-Gatineau as the “Best Place to Live” in Canada, based on its climate, health care access, prosperity, crime rates

and lifestyle (Money Sense, 2011). Similarly, the Wikitravel Web site identifies the Ottawa-Gatineau region as one of the lowest cost of living major North American cities (City of Gatineau, 2012).

In terms of its history, on February 10th, 1857, Ottawa was officially chosen to be the capital of the United Province of Canada. The city was reportedly chosen because its location would support the ability to unite Upper (i.e., Ontario) and Lower (i.e., Quebec) Canada. On July 1, 1867, Canada became a federation and Ottawa was confirmed as the country's capital and the government convened on Parliament Hill in downtown Ottawa.

A few notable points about the Ottawa-Gatineau CMA relevant to this study.

1. It is the only CMA in Canada to fall within two provinces. The City of Ottawa and the City of Gatineau have close economic and social ties.
2. Geographically, the CMA covers a land area of 6,287.03 square kilometres with a population density of 196.6 persons per square kilometre. Its population density is much higher than the rest of Canada and slightly lower than the average of other Canadian CMA's.
3. There were 498,636 private dwellings occupied by usual residents in Ottawa - Gatineau in 2011. The change in private dwellings occupied by usual residents from 2006 was 10.7%, a high growth rate. For comparison, in Canada as a whole, the number of private dwellings occupied by usual residents increased 7.1% (StatsCan, 2012a).
4. The population of the Ottawa-Gatineau CMA increased 9.1% between the 2006 and 2011 censuses, this compares to the growth rate of Canada as 5.9% and the growth rate of CMAs as 7.4%. The census data shows the population of Ottawa-Gatineau CMA outpaced the national growth rate over the last five years (Canadian Press, 2012).
5. In 2006, 16.0% of the population in Ottawa-Gatineau belonged to a visible minority group. This was on par with the national level of 16.2%. The largest visible minority group in Ottawa-Gatineau CMA was Black, who made up 4.0% of the total population in the CMA. It was followed by Chinese (2.9%) and the Arab visible minority group (2.5%). About two-thirds of Chinese and Arab residents in Ottawa-Gatineau were born outside of Canada, whereas four-fifths of Black residents were born outside of Canada. (StatsCan, 2006a)
6. According to Statistics Canada's 2006 Census of Population (StatsCan, 2007), the median age of Ottawa-Gatineau CMA is 38.4 compare to the Median age of Canada, which is 39.5.
7. In 2006, about 49.3% of the population of the Ottawa-Gatineau has English as their mother tongue, while 32.2% of the population has French as their mother tongue. 44.4% of the total population has the knowledge of both official languages (StatsCan,

2007). According to Statistics Canada's 2006 Census of Population's result on the Canada's official languages at work in the Ottawa-Gatineau CMA, the percentage use of English exclusively was 54.4%, mainly English was 20.9%, English and French equally was 4.2%, mainly French was 11.9% and French exclusively was 8.7% (StatsCan, 2006b).

8. The Ottawa-Gatineau CMA has been a relatively stable economy with an unemployment rate typically around 6% or 7%.
9. Ottawa-Gatineau was the CMA with the highest median total family income (\$89,410) in Canada (CTHRC, 2011).
10. As a global technology centre and Canada's national capital region, Ottawa-Gatineau CMA's economy is based around two major sectors: high tech and government. Occupying the most educated workforce in Canada, Ottawa-Gatineau is the second largest concentration of science and engineering employment out of 316 North American cities, surpassed only by Silicon Valley (investincanada.gc.ca, 2012). The high tech industry accounts for 18.9% of total GDP while public sector is 18.2% of total GDP, where 315,500 people work (19.4% of the CMA's total work force) for the federal government in the CMA (Ottawa.ca, n.d.c).

1.5 METHOD

This research undertook an impact analysis of the sports and entertainment organization that is the owner of a major North American Professional Sports club in a North America city. The specific context was the SSE organization, owners of the Ottawa Senators of the NHL, the Canadian Tire Centre and a variety of smaller properties, as well as an active charitable foundation.

Methodologically, the research was sequential in nature.

First, based on the literature, a model to measure the economic, sport and community impacts was developed. Importantly, the model was guided by three over-arching principles:

1. Undertake realistic and conservative estimates and assumptions and limit the use of multipliers, which are known sources of bias in previous studies (Crompton, 1995).
2. Expand the approach to include the intangible impacts in a realistic fashion, including variables related to both community development and sport benefits. In the case of sport impacts in particular, it is believed that this study represents one of the first efforts to include these benefits in an impact study.
3. Endeavour to generalize findings to similar contexts and provide learning about the importance of a professional sport franchise to its market. This is important to this report in that the method is undertaken in such a way that it could later be applied

to any similar context to effectively measure the impacts in that setting. Thus, it means the method cannot include any elements that are biased by context.

Second, in terms of data sources to inform the model and the analysis, a variety of primary and secondary sources were utilized. Where possible, existing data was used (e.g., SSE financial statements). In cases where existing data was not readily available, primary data was acquired and used to inform analyses (e.g., spectator survey at a concert at Canadian Tire Centre). In terms of time frame, although previous data was used to proxy for current situations, impacts were measured on an annual basis. Specifically, the time horizon for this study is the year from August 2012 to August 2013. In cases where data is from outside of this time frame, either before or after, assumptions were made to estimate the same figure for the time frame of interest.

Third, in terms of scope, the model included impacts that are economic, social, sport, brand, tourism, and community development in nature, with specific variables under each. In terms of the identification of the variables, a broad approach was taken in order to identify as many sources of potential impact as possible. Further, the impacts included direct, indirect and intangible benefits expressed with a variety of metrics not limited to just financial (i.e., the final output include, in some cases, an estimated dollar impact plus a list of other non-financial benefits). In estimating each variable, the best available data was used or acquired pending financial and time considerations. In all cases, a conservative approach was taken. Given the extensive nature of the study, estimates and proxies were used in certain cases.

Fourth, following the development of the model, a measurement of each of the items in the model was undertaken with SSE. Data sources include internal data, survey (fans, residents, tourists), focus groups (special interest groups), financial data, and secondary sources. Each of these is identified in the model development section that follows.

SECTION 2: SSE IMPACT MODEL

The impact model was constructed based on previous literature, including both the academic literature (see previous section), previous author experience, and examples of published impact studies undertaken on professional sport teams and mega-events. These examples were publicly sourced or were provided under disclosure by SSE. In order to provide as broad and holistic model as possible, impacts were considered from three frameworks: (i) by type of impact, (ii) by classifications of impact, and (iii) by target market.

The first draft of the model was created in May of 2012, with additions and changes made over the following months via consultation, additional research, and author input. The final model was completed in September of 2012. The resulting model is extensive and complex. To

illustrate this complexity, the initial model had a total maximum of 172 potential 'boxes' of impact, which required measurement or estimation (potentially on more than one aspect per box, inferring a possible number of 'boxes' well in excess of 172). The model was comprised of 16 target markets, 3 types of impacts and 4 classifications of impact, referred to below as a "16x4x3 model". The impacts include direct (e.g., a tourist spending \$'s directly in the market while visiting), indirect (e.g., tax benefits accrued to the city from additional tourist spending), and intangible (i.e., a non-financial benefit such as increased awareness and positive associations of Ottawa-Gatineau in North America leading to potential future visit). The classifications are financial, community development, infrastructure, and sport. The 16 target markets include citizens/residents of the CMA, tourists (4 types), new Canadians living in the CMA, Sens season ticket holders, single event ticket holders for Sens, single event ticket holders for big events, single event ticket holders for small events, suite holders, visiting professionals (sport), visiting professionals (music/entertainment), North-American non-tourists, and SSE itself.

2.1 POPULATING THE MODEL

The next phase of the model development was to populate the boxes. It is important to note here that boxes could have multiple measures (within the box) or the box could be empty (i.e., no relevant impacts or does not make sense in this context). An example is the direct, financial impact, tourists to big events, which would have multiple measures to measure the impact of SSE for these tourists. This box would include analyses of attendees at big concerts held at Canadian Tire Centre to determine what proportion are from outside of the CMA and how much they spent directly while in the CMA for their visit.

A first review of the model was conceptual and logical in nature where each box was reviewed and potential metrics considered for its measurement, guided by previous literature. Previous literature, brainstorming, secondary research and consultation further identified 137 potential sources or areas of potential impact to be considered when reviewing the model. This list is provided as Appendix B. Note that a number of the items are general (thus, leading to the identification of numerous items across the boxes) while others were not relevant in the context of an SSE impact study but are included nonetheless to demonstrate that they were considered (per existing literature on economic impact (see Crompton, 1995)).

Following the cross-tabulation of the list of impacts (Appendix B) with the 16x4x3 model, further narrowing of the effort took place to determine what methods were to be undertaken, what data was available and which were possible to acquire data for. Consideration of resources and feasibility was a key element to this step, given the limited financial resources available to purchase data or engage research firms to support data collection efforts.

Importantly, this step also included the removal of boxes, which are not relevant to this study. The result of this process was an identification of potential impacts that were measurable and were felt to account for the model. In some cases data was already available, in others it would have to be collected, and in others it would be estimated. In many cases, a potential impact would be relevant to more than one of the identified targets.

2.2 LIST OF BOXES AND GENERAL METHODS

The steps noted in section 2.1 led to a matrix of boxes slated for measurement, estimation or use of existing or internal data. In addition to secondary research (e.g., census data, other studies, comparable cases, previous economic impact studies, etc.) and internal information from SSE (e.g., financial information, ticket sales demographics, participation numbers in events/tournaments, etc.), a variety of primary data collection methods were designed and planned, including. All of the below methods were approved by the research ethics board at the University of Ottawa.

1. Surveys: online and paper versions of a variety of surveys for fans, tourists, general CMA population, online North Americans, and others.
2. Focus Groups: small group consultative/qualitative sessions with key input groups, including season ticket holders.
3. Interviews: one-on-one interviews with key personnel at SSE.

For each data collection exercise, proper methods were following, including respondent anonymity, questionnaire design, reporting procedures and ethics compliance.

2.3 LIST OF STUDIES UNDERTAKEN AND RESULTS

The following list includes each of the data collection exercises undertaken by the research team. Full details, including examples of questions, transcripts, documents, or copies of surveys, are available from one of the authors unless protected under disclosure. The order or presentation is of no particular importance.

- 2.3.1 United Way-SSE partnership and case study (*intangible impact*) – data provided by SSE, the United Way and interviews/reviews conducted by the researchers. In terms of impacts, SSE has a strong partnership to the United Way, in the form of 3 campaigns: Cheers for Charity, Campaign Assist, and Leadership Recognition. For the campaigns, SSE donates tickets and suites (average donation (2009-2011) value of tickets/suites: \$336,655) and player/alumni player appearances to recognize leadership donors, distributes communications to its ticket holders about the United Way, assisted with promotions in 1800+ workplaces in city, and

working together (United Way and SSE) to reach 7000 organizations in the city most of which are not-for-profit. Note that only the intangible benefits are included here as the value of the donations are not impacts to the CMA.

- 2.3.2 Sens@School program (*intangible impact*) – data provided by SSE for 2012-13 year – more than 107,000 students and 1,300 teachers impacted annually in a learning program designed to increase sport participation, learn the ‘science of hockey’, develop new fans, increase pride and develop partnerships with local schools. In 2012, a smaller group (4,700 students in 160 classes) took part in ‘Faceoff Fieldtrip’ where they also attended a Sens practice. Feedback from students is very high levels of satisfaction with the program. Importantly, this program has been growing at a rapid rate since 2010.
- 2.3.3 Evaluation of Impacts: Citizens and Residents of Ottawa Gatineau CMA (*intangible impacts*). This method incorporates a number of the ‘boxes’ in the model as it measures a variety of potential intangible impacts ranging from city pride, to attracting/retaining skilled workers, and city branding, as well as views on the importance of SSE, the Senators, the Sens Foundation, and the other events and facilities the organization operates.

Specifically, a multi-stage survey was implemented that measured 39 different boxes. Surveys were administered in public areas (e.g., malls, schools, arenas, markets, libraries, museums, downtown areas, and YMCAs) throughout the CMA, in both Ottawa and Gatineau, in both English and French. In total 528 useable surveys were completed. Results were positive for SSE on most metrics with certain intangible benefits being very important (i.e., more than 80% of respondents agree), including the facts that (i) SSE gives back, (ii) that if SSE left the city (i.e., there was no longer an NHL club or a world class facility in the city), it would have negative impact, and (iii) that SSE’s youth programs demonstrate the organization’s social conscience. These are presented in section 2.4.

- 2.3.4 Evaluation of Impacts: Key Grassroots SSE assets (*direct, indirect, and intangible impacts*). This study involves two detailed cases studies, analysis of secondary SSE data and surveys to measure the impacts of the Bell Capital Cup (event) and the Bell Sensplex (facility) on a number of direct, indirect and intangible attributes representing a number of the ‘boxes’ in the model.

This study utilizes demographic data for facility use/event participation and survey data (n=161) collected at the 8th Annual Capital Fall Classic Weekend in

November 2012, where visitor spending patterns were determined and applied to both the Bell Sensplex annual list of tournaments and the Bell Capital Cup to arrive at direct economic impacts for both properties. Importantly, only out-of-town participants and visitors are considered as sources of impact. Calculations and estimates are made for both the Bell Capital Cup and all other events held at the Bell Sensplex. In a 1 year period, the Bell Sensplex hosts 36 tournaments (not including the Bell Capital Cup) which attract 630 out-of-town teams who spent an average of 2.92 days in the region and an estimated \$6,938,754.42 total. Similarly, the Bell Capital Cup attracted 268 out-of-town teams, including 95 from the United States, in 2012, who brought a conservatively measured economic impact of \$2,962,896.30 to the CMA (the impact was \$4,180,041.15 using industry-accepted multipliers). Here, we use the conservative number.

These direct impacts are then used to estimate the indirect impacts that result from these investments. Although specific analysis of the indirect impacts were beyond the resource base of this research, a conservative multiplier of 1.2 is used to estimate an additional \$8.2 million in indirect impact from the Bell Sensplex and \$3.2 million from the Bell Capital Cup.

- 2.3.5 Evaluation of Impacts: Tourists to the Ottawa Gatineau CMA (*direct, indirect, and intangible impacts*). A very important aspect to this study, this multi-method project uses secondary data, SSE data and a variety of surveys to estimate the impact on the local market of tourists attracted to the region by any of (i) the Ottawa Senators, (ii) other major events at Scotiabank Place, and (iii) other minor events at Scotiabank Place. This includes general tourists who do not attend any events but who may have been encouraged to visit or learned of the city via SSE assets.

This study involved numerous analyses to estimate the tourism impacts of major (more than 10,500 spectators) and minor (less than 10,500 spectators) events at the Canadian Tire Centre. Examples of minor events measured include Barbra Streisand & Leonard Cohen, and major event examples are Bruce Springsteen & Carrie Underwood. Indeed, at these four concerts (held in October to December of 2012), data was collected from tourists in attendance. A survey of 23 questions (demographic, economic impact, intangibles) was administered at each concert from 1 hour prior to the start time of the show. Teams of researchers were placed throughout the arena.

Surveys (n=100) were collected from tourists at the 4 events and compared to ticket-sales databases to identify the overall tourist population. Resulting

analyses estimate a direct impact of \$647,228.74 from the 16 minor events held that year and \$56,897.16 from the 4 major events held each year. In adopting the same conservative 1.2 multiplier to estimate indirect impacts, approximate amounts of \$777,000 and \$68,000 for indirect are yielded. These tourists spent an additional \$2.9 million on tickets for the events. An indirect multiplier is not measured for this number.

- 2.3.6 Evaluation of Impacts: New Canadians (1st and/or 2nd generation Canadians) and French Canadians (*intangible impacts*). The review of literature identified specific target markets that are relevant to the local CMA as important to measure. SSE also has had limited success in attracting the French market in the CMA. Thus, this project explores – via focus groups and surveys - the role of SSE in welcoming new Canadians to the local region and in reaching the francophone population of Ottawa-Gatineau.

Both groups represent important segments of the CMA, as 25.4% of residents in the CMA list French as their mother tongue and 18% of the population were born outside of Canada.

This project involved three levels of data. First, focus groups were undertaken with non-season ticket holders from a variety of cultural backgrounds. The purpose was to inform the survey development and articulate views on SSE from their particular perspective. Second, an extensive survey data collection (n=237) was undertaken in 8 locations throughout the CMA, with 4 in Ottawa and 4 in Gatineau and various public locations geographically dispersed throughout the cities. Season ticket holder demographic data provided by SSE was also used. Of note, only 302 season ticket holders (75% francophone) are from the province of Quebec with 84% from the Gatineau mega-city. Results show a tremendous opportunity for SSE to increase its fan base and impact on the French community in the CMA. See Table 2.4 for specific select findings.

Due to logistics reasons, the focus groups on New Canadians were not completed.

- 2.3.7 Evaluation of Impacts: Season and Single Game Ticket Holders for the Ottawa Senators (*direct, indirect, and intangible impacts*). This study involved analysis of SSE data and survey data for major events and for minor events, including suite holders (local and non-local businesses) to estimate true non-displaced spending.

Due to the NHL work stoppage in 2012/2013, an alternate method of estimation was undertaken due to the inability to complete surveys at a Sens game. Thus, data collection at concerts and Ottawa 67s games held at (the then) Canadian Tire Centre (n=81) were used, coupled with information from the SSE ticket database, to estimate these impacts. Later, once the season started in the winter of 2013, a survey of tourists (n=151) at a Sens home game against the Toronto Maple Leafs was completed. The total of this sample is used (n=232). It was found that approximately 25% of ticket holders are from outside of the CMA. The 75% who live within the CMA are removed from the analysis as they do not impact the CMA. A key finding is that the average tourist who holds a ticket (single or season) – combination of the two surveys (n=232) spends an average of \$535.26 locally (not including ticket purchase) over a 1.7 day visit period while in the CMA. Over the course of a normal season, an estimated 103,797 visit Ottawa (including 17,000 from the US and 6,000 from Canada outside of Ontario and Quebec) and hold a Sens ticket, bringing a direct economic impact of \$55,558,382 to the CMA plus an indirect multiplier of a conservative 1.2 to estimate indirect/induced impact.

An additional \$5.7M is spent on tickets by tourists on average during the regular season.

Further, a second survey – specifically designed for small business owners – was conducted with a local business owners (n=18) to assess intangible factors related to the benefits of the Senators to the CMA.

- 2.3.8 Evaluation of Impacts: Visiting professionals (hockey and non-hockey) (*direct and indirect impacts*). This project interviews the appropriate SSE staff and reviews provided SSE data to estimate the economic and intangible impacts of visiting professionals (star athletes and performers, as well as the crews that support them) to the CMA.

For method, the visiting professionals were broken into two samples – visiting hockey professionals and visiting non-hockey professionals. In both cases, the crew (stagehands, media, management, etc.) are also considered. A scenario measurement model was built that measures scenarios based on nights in Ottawa (0, 1, 2, etc.) and expenses by lodging, food, miscellaneous, and local transport.

The scenario model was based on information provided by SSE managers who work specifically with the NHL club or events, plus cost estimations sources from

budgets and secondary sources. The overall schedule of Sens games and events/concerts in a given year was then used to estimate total impact on the CMA. The resulting estimates are \$1,373,230 for visiting NHL clubs and \$1,799,328 for visiting non-hockey professionals (musicians, etc.). The factor of 1.2 was used again to estimate indirect impact from these costs. Totals are included in the table in section 2.4.

2.3.9 Evaluation of Impacts: North-American non-tourists/non-residents (*intangible impacts*). This project uses online survey methodology (n=345) to evaluate the impacts of SSE and its properties on North Americans who are neither residents nor tourists to the Ottawa-Gatineau CMA. Boxes considered include those related to brand, city/country image, and similar impact variables. Any respondent who noted they were a previous resident or tourist to Ottawa-Gatineau was removed. Results show that the Senators have a strong impact on US residents' views of Ottawa and potential future interest in visiting Ottawa. With the exception of concerts, the Senators have a stronger influence on US residents than on Canadian residents (non-tourist) outside of the CMA.

2.3.10 Evaluation of Impacts: Intangibles (*intangible impacts*). This project groups the many remaining boxes that are intangible in nature (sport impacts, community impacts, etc.) which have non-financial benefits for the CMA. This includes a number of items, such as the positive social and philanthropic benefits of the Sens foundation and its charitable programs.

This research involved the systematic review of more than 80 boxes of the model and 31 SSE philanthropic programs (e.g., Skate For Kids, Equipment For Kids, Sens Street Tour, Sens Skills, Future Sens, Senators Alumni Clinics, and Scotiabank Skaters). Each of the programs was closely reviewed, interviews (if required) were carried out with the associated SSE staff member, and total fundraising gauged (but not counted here, as not an out of CMA impact), as well as an estimate of the number of local residents touched or engaged by these programs. That number is estimated to be approximately 478,000 Ottawa-Gatineau residents during the 1992-2011 time period with most being touched multiple times by these programs. It is important to note that these touch points included sport impacts (coaching, participation, equipment, etc.), community impacts (outdoor programming, hospital visits, alumni clinics, etc.) and use of SSE facilities to do so.

This stage of the research also included a content analysis of articles and online, social media postings about SSE. The review found that 9/10 articles and 6/8 postings depicted SSE or the Senators in a positive way.

- 2.3.11 Internal SEE Financial Analysis (*Direct Impacts*). Under disclosure, the researchers were provided with detailed SSE financials to estimate the direct impacts on the CMA by the organization. In considering revenues that SSE has brought into the CMA from outside (e.g., revenue-sharing from league sponsorship or television deals, royalties, etc.), minus the proportion of ticket revenues from external buyers (already included in 2.3.7) and leakages out of the CMA (e.g., salaries paid to players who do not live permanently in the CMA), and looking at dollars that remain in the CMA, an estimated \$13.3M in incremental to the impacts already noted in previous sections was calculated.
- 2.3.12 Leakage Estimation (*direct impact*) – in the survey data in study 2.3.3 and 2.3.7, local residents were asked about intentions to consume NHL hockey if the Senators were not in Ottawa. Based on these estimations, and a conservative 10% factor, it is estimated that Ottawa residents would leave the CMA and spend approximately \$3 million annually in attending NHL hockey games in other markets.
- 2.3.13 Evaluation of Impacts: Senators Playoff Games (*direct impact*). Although the Senators did not play a playoff game during the data collection period, they typically do. In fact, over their 21 year history, the Senators have played 60 home playoff games, for an average of 2.86 playoff games per year. Using the per/game estimated economic impact of a regular season game (see 2.3.8), an additional estimated impact is calculated. The calculation is further impacted by the fact that 25% of playoff ticket buyers are from outside of the CMA (SSE database postal code data) and that ticket prices are 62% higher than regular season tickets. Estimates of tourism spending (lodging, etc.) are assumed to be the same in playoffs as in regular season. The leads to an estimated economic impact of playoff games of \$7.5M annually (direct) from non-ticket expenditures. An additional \$1.2M is spent on tickets by tourists on average during the playoffs.
- 2.3.14 Capital Investments (*intangible impact*). Although it cannot be classified as a true economic impact coming from outside of the city, the benefits of SSE investing in major facilities in the CMA must be noted as an intangible value, as

these facilities provide value to citizens and the ability to host other events and activities in the CMA. Since their founding 21 years ago, SSE has made capital investments in 6 major facilities, including the Palladium (value \$110M in 1995) and related road and highway infrastructure (\$35M in 1995), the Bell Sensplex (\$23M in 2004), Rogers House (\$5M in 2005), Rink of Dreams (\$2M in 2012), and the Richcraft Sensplex (\$26M in 2014). In 2014 dollars, accounting for the time value of money, this equates to an investment of \$258.8M in capital projects (2014 dollars).

2.3.15 Hosting of Major International Events (*direct and indirect impact*). Over the course of its 21-year history, SSE has been host to a number of major international events which bring tourists to the Ottawa-Gatineau CMA. The past decade (2004-2013) was considered for this analysis. Although the impact of these events was not measured in this study, they were previously measured by 3rd parties such as the Canadian Sport Tourism Alliance. For the purposes of this study, the following major events are included for consideration: (i) the 2009 IIHF World Junior Ice Hockey Championships, (ii) the 2008, 2009, 2010, 2013 and 2014 CIS Final 8 Men's Basketball Championships, (iii) 2013 IIHF Women's World Ice Hockey Championship, (iv) the 2012 NHL All-Star Game, and (v) the 2005 and 2008 NHL Entry Drafts. Each of these reports were reviewed closely (SSE provided full reports) and only those impacts directly related to outside visitors to the CMA were considered. The total of these amounts were then averaged and considered as representative of the annual impact (as SSE has hosted an average of 1 major national or international event each of the past 10 years). This amount is estimated at \$4.3M annually (direct) and \$9.5M annually (direct + indirect).

2.4 SUMMARY TABLE OF ESTIMATED IMPACTS

The following table summarizes the financial (sum of direct plus indirect impacts) and intangible (listed by a variety of variables) impacts of SSE on its CMA.

<u>Method</u>	<u>Direct Financial Impact</u>	<u>Direct + Indirect Financial Impact</u>	<u>Impacts: Intangible</u>
United Way Case	\$0	\$0	*player/alumni appearances, partnership to reach 1800+ workplaces and 7000+ organizations
Sens@School Program Data	\$0	\$0	*107,000+ students and 1,300+ teachers participated in program, engagement and satisfied
Resident Surveys	\$0	\$0	*56% agree that SSE has a positive impact on CMA
			*51% agree that SSE positively impacts local business (with Kanata Development, Job Creation and Business Benefit all noted by the majority)
			*64% agree that SSE is a catalyst for Kanata development
			*56% agree that SSE positively impacts community cohesion (multiple measures)
			*64% agree that SSE provides the community with the ability to experience new activities
			*83% agree that SSE provides opportunities for family activities and family interaction
			*59% agree that SSE has a positive impact on the perception of the community
			*77% believe that the Ottawa Senators enhance the reputation of the CMA
			*68% agree that the Ottawa Senators Foundation is a source of pride in Ottawa-Gatineau
			*70% agree that having local events at Canadian Tire Centre of Bell Sensplex contribute to the development of the community
*81% believe that SSE invests back in to the community			

			*73% agree that having a professional sports team in the region helps to develop the population's interest in sport and encourages active living
			*81% agree that SSE demonstrates a social conscience through its youth programs
			*75% agree that the Ottawa Senators are a source of national pride for the region
			*85% agree that losing SSE if the Senators moved would be a great loss for the community
Bell Sensplex	\$6,938,754	\$15,265,260	*94% of visitors would never have considered the region if not for the SSE tournament
Bell Capital Cup	\$2,962,896	\$6,518,372	*On scale of 5, 3.84 was mean response for likelihood for a return visit to Ottawa
			*On a scale of 5, 3.5 was the mean response interest level in returning for a Sens home game
Tourism - Minor Events (all local expenditures but not tickets)	\$647,229	\$1,423,903	*Tourists typically spend 2.39 days in Ottawa when they come for an event and 73% stay in hotels (average nightly rate: \$139) *Number is higher than major events due to the occurrence of many more minor than major events
Tourism - Major Events (all local expenditures but not tickets)	\$56,897	\$125,174	*87% of tourists report that the event was the principal reason for their visit
Tourism - tickets sales for major and minor events	\$2,916,984	\$2,916,984	N/A
Francophone Market	\$0	\$0	*29% of francophone respondents were Sens fans (55.5% were Montreal Canadiens fans)
			*45% of those who have attended a game intend to definitely go back, only 3% said they will not return
			*70% believe Sens players are 'good ambassadors' and 70% believe SSE fosters good values
			*64% believe that SSE positively enhances the community image of Ottawa-Gatineau

			*63% report that the hockey club has a positive impact (various forms) on their lives, however only 4% link it to the club's on-ice success
New Canadians	\$0	\$0	Not fully completed but early results demonstrate that the SSE does play a role in helping welcome New Canadians to the country
Tourism impact – Senators Regular Season Games (all local expenditures in the market/no tickets)	\$55,558,382	\$122,228,440	*90% likely to recommend Scotiabank Place (at the time) to a colleague
			*64% likely to recommend Kanata Centrum to a colleague
			*95% likely to recommend Parliament to a colleague
			*98% likely to recommend the Rideau Canal to a colleague
Tourism Impact – Ticket Sales for Senators Regular Season Games	\$5,673,544	\$5,673,544	*Contributes to other intangible benefits as non-local residents comes to the city
Local Business Owners	\$0	\$0	*Local business owners report that Senators benefit is very context dependent, some sectors benefit from the club while others saw a spike in business during the NHL work stoppage
			*Most local business owners noted a need to alter business strategies based on the Senators schedule
Visiting Hockey Professionals	\$1,373,230	\$3,021,106	*Amount is lower than one might think as visiting hockey teams typically do not stay in Ottawa for a long period of time and do not use much local transportation.
Visiting Non-Hockey Professionals	\$1,799,328	\$3,958,522	*Amount is lower than one might think as visiting performers and their staff often do not stay over and do not use a significant amount of local transportation
North American Non-Tourists, Non-Residents	\$0	\$0	*18% of US respondents associate the word NHL to "Ottawa"
			*20% of US respondents associate the word 'Senators' to "Ottawa"
			*27% of US respondents agree that the Senators influence their potential decision to visit Ottawa in the future
			*26% of US respondents agree that a concert at (then) Scotiabank Place influences their potential decision to visit Ottawa in the future
			*30% of Canadians outside of Ontario and Quebec associated "Senators" with "Ottawa"
			*76% of U.S. residents "Agree" or "Strongly agree" in saying that the Ottawa Senators positively impact the Ottawa region

			*72% of Canadians think that the presence of the franchise positively impacts the region
			*45% of Canadian respondents agree that a concert at (then) Scotiabank Place influences their potential decision to visit Ottawa in the future
Philanthropic Program Analysis	\$0	\$0	*478,299 local residents impacted or engaged in a program between 1992 and 2011
Content Analysis	\$0	\$0	*9/10 articles depict SSE positively
			*6/8 posts/blogs depict SSE positively
Incremental (not included elsewhere) Contribution of Senators Operations on Local Economy	\$6,053,348	\$13,317,366	N/A
Leakage if No Team	\$3,041,811	\$3,041,811	*70% of local Sens ticket holders say they would travel elsewhere to watch NHL hockey if Sens were no longer in town
Tourism impact – Senators Playoff Games (includes local expenditures but not tickets)	\$7,462,862	\$16,418,296	*No specific intangible data was collected (no playoffs in data collection year) but well established that playoffs in a major sport incites additional interest in a city (city pride, branding, outdoor events, etc.).
Tourism impact – Playoff Ticket Sales	\$1,234,597	\$1,234,597	
Capital Investments (1995-2014)	\$0	\$0	\$258.8M in capital investments (2014 dollars) in 6 major projects to provide facilities to the CMA
Major Event Hosting	\$4,300,000	\$9,500,000	
TOTAL ANNUAL	\$100,019,862	\$204,643,374	Numerous Important Intangible Benefits
<i>Long Term Estimate</i>	<i>HISTORY OF SENS (21 Years)</i>		<i>In excess of \$1.5B (direct) and \$3B (direct + indirect + induced)</i>

SECTION 3: SUMMARY: FINANCIAL IMPACT

As reported in Table 2.4, the estimated annual economic impact of SSE on the Ottawa-Gatineau CMA is \$204 million (direct and indirect) based on a direct financial impact of an estimated \$100 million. An extensive list of intangible benefits for the CMA was also measured and provides evidence of the importance of SSE to the local market.

The \$204 million number considers annual impacts as measured or estimated for the 2012-2013 year normalized to assume a full NHL regular season Schedule. The analysis is conservative in nature in terms of its estimates of indirect impacts, its articulation of intangible benefits as non-financial only, its non-consideration of past capital investments, and its strict removal of impacts that were not from outside the unit of analysis (CMA). Thus, the estimate is considered to be conservative and the 'true' number is potentially higher but, in the opinion of the authors, certainly not lower. It is felt to be realistic, conservative and based on proper assumptions.

If you consider that SSE has been in existence for 21 years, the results of this study can be conservatively extrapolated to estimate that the club has generated more than \$3.0 billion (direct and indirect) for the CMA since the return of the Ottawa Senators to the NHL, including more than \$1.5 billion in direct impact.

A few important points from the financial analysis:

- a. The Bell Sensplex and the Bell Capital Cup generate \$21.7 million (direct + indirect) annually from 'outside' the region (that stays in the region) plus contribute positively and significantly to future tourism, as well as the brand image of the City of Ottawa and SSE.
- b. Senators Sports & Entertainment have led community efforts to attract and then subsequently host world class events that contribute an average of \$9.5 million (direct + indirect) annually to the local economy. These include major events like the NHL All-Star Game, IIHF World Junior Hockey Championship and IIHF Women's World Hockey Championship.
- c. Concerts (major and minor) held at Canadian Tire Centre attract a large population of tourists to Ottawa-Gatineau who spend (direct) approximately \$4.3 million (direct + indirect) annually (flows that stay in the region) and indicate a very high level of likeliness to return visit.

A few highlights of the long list of intangible benefits.

- d. Ottawa Senators hockey games, including regular season and playoffs, attract more than 118,000 people on average each year from outside the Ottawa-Gatineau CMA.
- e. The Ottawa Senators NHL Hockey Club itself is a contributor to the CMA as the proportion of the flows it brings in from non-local revenue sources is greater than the flows of expenses out of the CMA.

- f. Close to half the CMA population has been involved in an SSE philanthropic event since 1992.
- g. Based on a survey of 528 local area residents, the majority (56%) identify SSE as having a positive impact on the region. Similarly, 51% of local businesses express the same positive response.
- h. Based on a survey of 528 local area residents, SSE as an important and positive contributor to the Ottawa-Gatineau community, including:
 - i. 81% agree that SSE demonstrates a social conscience through its youth programs;
 - ii. 81% believe that SSE invests back in to the community;
 - iii. 75% agree that the Ottawa Senators are a source of national pride for the region; and
 - iv. 77% believe that the Ottawa Senators enhance the reputation of the CMA.
- i. There is considerable opportunity for growth in the engagement of the francophone population in Ottawa-Gatineau and amongst new Canadians in the region with SSE events and programs.
- j. Sens @ School program is a huge and growing success – more than 107,000 students and 1,300 teachers in 2012-2013, many from outside of the CMA.
- k. Web/print review – more than 85% of comments/posts/blogs/articles are positive about the Senators.
- l. The ‘typical’ tourist to Ottawa attending a Senators game spends more than \$500 (local spending only) in Ottawa, with some spending as much as \$5,000.

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APPENDIX A

Ottawa Senators Foundation Mission (provided by the Sens Foundation)

The Ottawa Senators Foundation is largely supported through event fundraising, corporate partnerships, and private donors. Over the past twenty-two years in partnership with the hockey club, alumni, corporate partners and fans, the Ottawa Senators Foundation has invested more than \$70 million into community programs in the national capital region.

Since the commencement of the study the Ottawa Senators Foundation has gone through an evolution in its community fundraising, advocacy, and investment strategy. Today, the Ottawa Senators Foundation empowers children and youth to reach their full potential by investing in social recreation and education programs that promote both physical and mental wellness.

The organization raises its funds by way of:

1. 50/50 Raffle: 3 preseason games, 41 regular season games, and scheduled playoff games.
2. Corporate Event Sponsorship & In-Market Campaigns: The Ottawa Senators Foundation strives to secure enough sponsorship funding to cover off the expense of the events it hosts to ensure that purchase, raffle and auction revenues from events go directly back into the community. Similarly, the organization works with corporate partners on joint in-market campaigns to raise awareness and funds.
3. Signature Events: Senators Charity Golf Classic, Senators Soiree, Senators Telethon, Senators Alumni & NHL Celebrity Cup, Senators SocieTEA, Senators Hockey Talks Mental Health, Senators Hockey Fights Cancer, Senators Skills Competition
4. Third Party Community Events: Approximately 100 individuals, community groups, and companies support the Ottawa Senators Foundation on an annual basis by way of hosting events focused on generating funding for the organization. Funds raised from such activities range from \$50 to \$300,000.
5. Individual Donations & Major Gifts

Core areas of significant community investment, programs receiving \$75,000+ in annual funding support from the Ottawa Senators Foundation, currently include:

- SENS RINKS
- Sens Leadership & Athletic League in partnership with the Boys & Girls Club of Ottawa
- Sens Play to the Max in partnership with the Max Keeping Foundation

- Sens I Love to Skate in partnership with the City of Ottawa and Canadian Tire Jumpstart Charities
- Sens@School delivered in 20 school boards in the region reaching more than 107,000 students annually.
- Sens Hockey Talks Mental health Project with DIFD
- Project STEP
- Roger's House

The Ottawa Senators Foundation is also supporting more than 100 more charitable organizations in a smaller capacity by way of its 50/50 Partnership Program, Event Sponsorships, Cheer for Charity Program, In-Kind Donations, and grants of \$10,000 or less.

To learn more about the Ottawa Senators Foundation and its current events and community investments, visit: www.sensfoundation.com

APPENDIX B

The following list was identified via the literature, consultation, expert input and secondary research to inform identification of methods and metrics within each of the boxes.

<i>Item</i>	<i>Type of Impact</i>	<i>Classification</i>	<i>Target</i>
1.Tourists Impact - Tourism	Direct	Financial	Tourists to CMA
2.Tourists Impact - Sens Game	Direct	Financial	Tourists to Sens Game
3.Tourists Impacts-Big Events	Direct	Financial	Tourists to Big Events
4.Tourists Impact-Small Events	Direct	Financial	Tourists to Small Events
5.Airport Activity	Intangible	Community Development	Tourists to CMA, Visiting Teams, Visiting Concerts/Events
6.Architectural Heritage	Intangible	Infrastructure	Citizens of CMA
7.Audiovisual Spectatorship	Direct-Intangible	Financial	N-Americans Non-Tourists
8.Attraction of Big Scale Events	Intangible	Community Development	Tourists to Big Events / Ticket Holders for Big Events
9.Creation of Bus Routes	Intangible	Infrastructure	Citizens of CMA
10.Business Development	Intangible	Community Development	Suite Holders (businesses)
11.Business Opportunities	Intangible	Community Development	With premium seating and season tickets offers, SSE provide local businesses with opportunities to discuss with new clients around an entertainment proposition.
12.SSE investment in local community	Direct-Indirect	Financial	Businesses (Sens-related)
13.Charitable Giving	Intangible	Community	Citizens of CMA

		Development	
14.City Association with SSE Brand	Intangible	Community Development	Citizens of CMA/Tourism to CMA/N Americans
15.City Reputation	Intangible	Community Development	Citizens of CMA/Tourism to CMA/N Americans
16.City Sponsorship	Direct	Financial	Suite Holders (businesses)
17.Civic Pride	Intangible	Community Development	Citizens of CMA
18.Civic Satisfaction	Intangible	Community Development	Citizens of CMA
19.Coaching Development	Intangible	Sport	Citizens of CMA
20.Community Bonding	Intangible	Community Development	Citizen of CMA/New Canadians
21.Competition between the businesses	Intangible	Community Development	Suite Holders (businesses)
22.Competition of the Sens	Intangible	Sport	N-Americans Non-Tourists Non-Tourists
23.Concessions	Direct	Financial	Providing opportunities for franchises to be part of the entertainment package offered by SSE. Opportunity to have additional sales at higher revenues.
24.Connecting Canadians – Languages	Intangible	Community Development	Citizens of CMA
25.Connecting Canadians - Success-Failures	Intangible	Community Development	Citizens of CMA
26.Connecting Canadians – Opportunity	Intangible	Community Development	Citizens of CMA
27.Connecting Canadians – Immigrants	Intangible	Community Development	Immigrants through Single Events Ticket Holders for Sens
28.Connecting Canadians - New Canadians	Intangible	Community Development	New Canadians

29.Connecting Canadians - Multiculturalism	Intangible	Community Development	Citizens of CMA
30.Contribution to NSOs	Direct - Intangible	Sport	Internal
31.Economic Dynamism and Stimulation	Direct-Intangible	Community Development	Internal - Suite Holders (businesses)
32.Emotional Attachment	Intangible	Community Development	Citizens of CMA, Tickets Holders for Sens
33.Employment	Direct	Financial	Community, Financial
34.Entertainment - Sens Game	Intangible	Community Development	Ticket Holders for Sens
35.Entertainment - Big Events		Community Development	Ticket Holders Big Events
37.Entertainment - Small Events	Intangible	Community Development	Ticket Holders Small Events
37.Environmental and Ecological Benefits	Intangible	Community Development	Internal
38.Ethnic Interaction	Intangible	Community Development	New Canadians + Citizens of CMA
39.Excitement of Attending - Sens	Intangible	Community Development	Ticket Holders for Sens
40.Excitement of Attending - Big Events	Intangible	Community Development	Ticket Holders for Big Events
41.Excitement of Attending - Small Events	Intangible	Community Development	Ticket Holders for Small Events
42.Value of Existence and Leaving - Sens	Intangible	Financial - Community Development - Sport	Ticket Holders for Sens - Suite holders (Businesses) - Citizens of CMA
43.Focal Point Community Activity - Sens	Intangible	Community Development	Citizens of CMA - Sens Ticket Holders - Season Tickets Holders

44.Foreign Business Attraction	Direct	Financial	N Americans Non-Tourists - Suite Holders (businesses)
45.Fostering Good Attitudes	Intangible	Community Development	Citizens of CMA
46.Foundation Giving	Direct-Indirect	Community Development	Internal
47.General Participation in Sport	Intangible	Sport	Internal
48.Gift Donations (In-kind)	Intangible	Community Development	Internal
49.Grants/Scholarships/Bursaries	Direct	Financial	Internal
50.Grassroots Development	Intangible	Sport, Community Development	Internal - Citizens of CMA
51.Halo Effect	Intangible	Infrastructure	Internal
52.Health Care Costs	Direct	Community Development	Citizens of CMA
53.Recruiting Health Professionals and other professionals	Intangible	Community Development	Various
54.Promotion of a Healthy Lifestyle	Intangible	Community Development	Internal - Citizens of CMA
55.Heritage	Intangible	Community Development, Sport	Citizens of CMA
56.High-Profile Image	Intangible	Community Development	N-Americans Non-Tourists Non-Tourists - Businesses
57.Historical Source of Pride (Hockey)	Intangible	Sport	Citizens of CMA, Season Ticket Holders, N-Americans Non-Tourists Non-Tourists
58.Immigration Destination	Intangible	Community	New Canadians - N-Americans Non-

		Development	Tourists Non-tourists
59.Impact of Alfredsson	Direct- Indirect- Intangible	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
60.Impact of Awards	Intangible	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
61.Impact of Drafting International Players	Intangible	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
62.Impact of a French Canadian on the team	Intangible- Direct	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
63.Impact of a Local Player on the team	Intangible	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
64.Impact of Signing or Drafting a Superstar	Intangible	Sport	Citizens of CMA - Ticket Holders for Sens - Season Ticket Holders
65.Impact on Universities	Intangible	Community Development	Various
66.Increase of Interest in Sport	Intangible	Sport	Citizens of CMA, Ticket Holders Sens Game
67.The capacity of welcoming international events	Intangible	Community Development	Visiting Pros -Concerts Events
68.Land Value	Direct	Financial	Internal
69.Legacies	Direct- Intangible	Community Development	Citizens of CMA
70.Life Expectancy	Intangible	Community Development	Citizens of CMA
71.Licensing	Direct- Indirect	Financial	Internal
72.Impact of Local Events	Intangible	Community Development	Citizens from CMA, Ticket Holders for small events

73.Key Marketing Tool	Intangible	Community Development	Tourists
74.Paper Media	Direct	Financial	N-Americans Non-Tourists and citizens of CMA
75.Memorable Experiences	Intangible	Community Development	Single event Ticket Holders for Sens, big events and small events.
76.Mental Health	Intangible	Community Development	Internal
77.Molding Character	Intangible	Community Development	Season Ticket Holders and Ticket Holders for Sens
78.Mood - Sens	Intangible	Community Development	Citizens of CMA - Tickets Holders for Sens
79.Mood - Big Event	Intangible	Community Development	Tickets Holders for Big Events
80.Mood - Small Event	Intangible	Community Development	Tickets Holders for Small Events
81.Municipal Leadership	Intangible	Community Development	Citizens of CMA
82.National Capital Amateur Sport	Intangible	Infrastructure	Internal
83.National Capital Publicity -Games	Intangible	Community Development	Various
84.National Culture and Diversity	Intangible	Community Development	Citizens of CMA - New Canadians
85.National Pride	Intangible	Sport	N-Americans Non-Tourists, Tourists to Sens Games
86.Access to the NHL and its Contacts	Direct	Financial -Sport	Internal
87.Notoriety	Intangible	Community Development	N-Americans Non-Tourists

88. Development of Parks/Ice Rinks	Intangible	Community Development	Internal
89. Passion of Hockey	Intangible	Community Development	Citizens of CMA, New Canadians. Ticket Holders Sens, Season Ticket Holders
90. City Appearance - Physical	Intangible	Community Development	Citizens of CMA, Tourists in CMA
91. Players as Ambassadors	Intangible	Community Development	Citizens in CMA
92. Player Transfers	Direct	Financial	Internal
93. Influence on Politics	Intangible	Community Development	Various
94. The Pro Image of the City could attract other Sports in the City	Intangible	Sport	Various
95. Promotion of both Official Languages	Intangible	Community Development	Citizens of CMA, Tourists in CMA
96. Psychological Attachment to the Team	Intangible	Community Development	Citizens of CMA, Ticket Holders for Sens
97. Real Estate Development	Intangible	Community Development	Internal
98. Rink of Dreams	Intangible	Infrastructure	Citizens of CMA
99. Roads Development	Intangible	Infrastructure	Citizens of CMA
100. Players as Role Models	Intangible	Community Development	Citizens of CMA
101. Salary, Wages, and Benefits	Direct, Indirect	Financial	Internal/citizens of CMA
102. Developing School Programs	Intangible	Community Development	Citizens of CMA, Internal
103. Sentiment of Belonging	Intangible	Community	Citizens of CMA, Ticket Holders for Sens,

		Development	Season Ticket Holder, New Canadians
104.Setting an Example	Intangible	Community Development	Citizens of CMA, Businesses (Sens related)
105.Size of the Local Economy	Intangible	Community Development	Suite Holders (businesses)
106.Skill Training	Intangible	Community Development	Internal
107.Social Cohesion	Intangible	Community Development	Ticket Holders for Sens, Season Ticket Holders, New Canadians
108.Social Conscience	Intangible	Community Development	Internal, Citizens of CMA
109.Social Health	Intangible	Community Development	Citizens of CMA
110.Sport Accessibility	Intangible	Community Development - Sport	Internal, Citizens of CMA
111.Sport-Good Industries	Direct-Indirect	Financial, Community Development	Internal
112.Stimuli for Technological Innovation	Intangible	Financial, Community Development	Internal/Suite Holders (businesses)
113.Taxes	Direct	Financial, Community Development	Various
114.Taxi and Bus sales on Sens Nights	Direct	Financial	Various
115.Taxi and Bus sales on Big Event Nights	Direct	Financial	Various
116.Taxi and Bus sales on Small Event Nights	Direct	Financial	Various

117.Team Travel Spending	Direct	Financial	Internal/Visiting Pros- Visiting Teams
118.Ticket Sales	Direct	Financial	Internal, Tickets holders Sens Games, tickets holders big events, tickets holders small events, tourists to big events, tourists to small events, tourists for Sens Games.
119.Tourism - Sens	Direct	Financial	Tourists in CMA
120.Tourism - Big Events	Direct	Financial	Tourists in CMA
121.Tourism - Small Events	Direct	Financial	Tourists in CMA
122.TV Rights and Revenues	Direct	Financial	Internal
123.Volunteers' Contribution	Intangible	Community Development	Internal
124.Web Coverage	Intangible	Community Development	Internal
125.Values - Friendship	Intangible	Community Development	Citizens in CMA, All ticket holders
126.Values - Personal Growth	Intangible	Community Development	Citizens in CMA, All ticket holders
127.Values - Leadership	Intangible	Community Development	Citizens in CMA, All ticket holders
128.Values - Teamwork	Intangible	Community Development	Citizens in CMA, All ticket holders
129.Values - Cooperation	Intangible	Community Development	Citizens in CMA, All ticket holders
130.Values - Altruism	Intangible	Community Development	Citizens in CMA, All ticket holders
131.Values - Programs	Intangible	Community Development	Citizens in CMA, All ticket holders
132.Increase in Salaries due to skill development	Direct	Financial	Internal

133.Impact of an Engaged Owner (Eugene Melnik)	Intangible	Sport	CMA Citizens - Ticket Holders for Sens - Season Ticket Holders
134.Impact of the All-Star Game	Intangible	Sport	CMA Citizens - Ticket Holders for Sens - Season Ticket Holders
135.Facilities - Scotiabank Place	Intangible	Infrastructure	Internal
136.Facilities - Bell Sens Plex	Intangible	Infrastructure	Internal
137.Facilities -Rogers' House	Intangible	Infrastructure	Internal