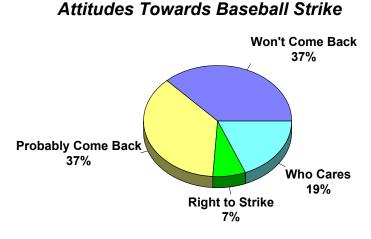
A few recipients have informed us that these emails sometimes omit graphics.

For this reason, the attachment to this email is a Word file with identical information and full graphics formatted for printing.



Dodging the Bullet: Play Ball ... Or Else!



Percentages calculated without blank responses (5% of total)

Many members of Vallev's the business community would have abandoned baseball if the players had gone strike. on according to а O'Neil new Associates Valley Influentials Poll.

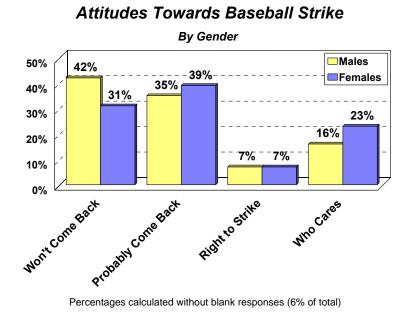
When asked immediately prior to the resolution

of the baseball conflict, fully 37% of business people in Maricopa County were sufficiently angry to say they would not come back in the event of a strike. An equal proportion (37%) also voiced anger, but said they would probably come back after a strike. A small majority felt that the statement "Hey, the right to strike is American" best described their attitude, and 19% do not follow baseball and did not care about the threat of a looming strike.

"Conflicts over money seem to be a recurring problem in baseball," said poll director Dr. Michael O'Neil, "and whether you're on the side of the league, the owners, or the players, nobody wants to see the sport that they love destroyed by greed or intransigence."

O'Neil continued, "It appears that resentment is still substantial after the baseball conflicts of recent years. Our numbers suggest that one more broken season might push a lot of influential people over the edge, and once people leave, they may not be easy to bring back. 'Three strikes and you're out' could take on a whole new meaning if those who negotiate baseball's contracts are not very careful."

As for the particular importance of the sentiments in the business community, O'Neil cautioned, "Sports in the United States depends on the support not only of the fans. but also of businesses, and it would certainly be a loss the sport of baseball could not bear if anger over a perhaps unnecessary conflict had driven away potential sponsors and investors in the business community."

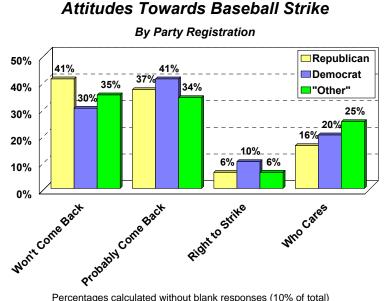


Men More Upset Than Women

Republicans and males seem somewhat more angered by the specter of a baseball conflict than do Democrats. independents, and women. Whereas 41% of Republicans and 42% of males would not come back after a strike, just 30% of Democrats and 31% of women

feel the same. This is partly explained by the fact that more women and non-Republicans do not follow baseball.

According to Dr. O'Neil, "Our numbers do not tell us that baseball is becoming a matter of party politics. We simply know that more women tend to be Democrats, and it probably is not surprising to anyone that there are more women who do not follow sports very closely."



Does Action Speak Louder Than Words?

As an important final note, O'Neil stressed that "What people say and what people do are not always one and the same-attitude does not predict behavior perfectly."

Percentages calculated without blank responses (10% of total)

"Many people were angry and concerned about the looming strike, but we know in the opinion research field that surveys sometimes become a way for people to voice their opinions and thereby act politically when they are interviewed about topics that are dear to them, even if they are not prepared to carry out their threats."

In other words, we know that it is unlikely that baseball would have lost more than onethird of its fan base in the business community if the recent conflict had ended in a strike. "Nevertheless," Dr. O'Neil finished, "the survey result sends a strong message that it would be ill-advised to ignore. Even if it was unlikely that most people would renounce our national pastime over the long run as a result of a strike, the intention behind their protest was genuine. The anger was real."

About the Poll. The O'Neil Associates Valley Influentials Poll is a web-based survey that was sent to all members of Greater Phoenix Leadership, Valley Leadership, East Valley Partnership, and Westmarc and subscribers of the Phoenix Business Journal. As such, this survey does not purport to be a random or representative sampling of the general population of the Phoenix metropolitan area. It would be difficult, however, to conceive of a more comprehensive representation from which to draw inferences about the opinions and sensibilities of the business community than the membership of these organizations and the readership of the Valley's premier business publication, although, inevitably, any definition of the business community is somewhat subjective. The persons surveyed are likely to exert disproportionate influence on and be an early indicator of community opinion by virtue of their position, community involvement, and political participation. The O'Neil Associates Valley Influentials Poll was not sponsored or paid for by any outside organization. One thousand two hundred and seventy-eight participants completed the survey between August 27 and September 3, 2002, yielding a margin of error of ±2.7%. O'Neil Associates, Inc. is a Tempe-based public opinion research firm specializing in client-focused attitude and awareness studies for a wide variety of industries and organizations.

FOR IMMEDIATE RELEASE FURTHER INFORMATION: Michael O'Neil, Ph.D., 480-967-4441 *These results may be reported freely provided that they are identified as the "O'Neil Associates Valley Influentials Poll" including identification on any graphic material.*

O'Neil Associates has tracked public opinion across the Valley, Arizona, and the Nation since 1981. To be healthy, public debate must be informed—this is why we commit our resources to measuring opinions on the political and social issues people care about and talk about. O'Neil Associates, however, is <u>much more than that</u>. While the **Valley Influentials Poll** and **Valley Monitor** may be our most publicly visible activities, we do most of our work for private businesses and organizations as well as state and other public agencies. As a full-service research firm, we assist our clients with a broad range of research efforts to measure customer satisfaction, improve customer service, fine-tune public images, focus marketing campaigns, engineer products, increase market shares, (VIP014-

strengthen employee relations, and plan, refine, and assess business strategies.

For other surveys of public interest, please visit <u>http://www.oneilresearch.com/surveys.htm</u>

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