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SPORT ENGLAND EAST MIDLANDS

east midlands tourism

Final Report: Published Version

Developing the Impact of Sports Tourism in the East Midlands

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Foreword by Jeff Moore, Chief Executive, East Midlands Development Agency

Sport inspires us all and raises the aspirations of our nation to succeed. The national euphoria which greeted our successful bid for the London 2012 Olympic and Paralympic Games shows just how deeply sport touches so many of us.

But sport is more than a leisure pursuit – it is an industry. A very big and very successful industry. A big part of that industry is sports tourism.

Here in the East Midlands we have world class sport stars, world class facilities and events that are the envy of many nations in the world let alone other regions in the UK. The question is "*do we truly appreciate what we have, and do we know what goals we must work towards to maximise the benefits for the East Midlands?"*

Do we truly understand the way sport enriches our lives, not only through participation and support for our favourite teams and players, but the economic benefits it brings through trade and tourism and the contribution it can make to the skills of our people and to the regeneration of our communities?

This report shows just how much we already owe to sport tourism and how much more we can benefit – economically and socially – if we dedicate effort and resources to making the most of what we have, and to strengthening our region further in sport and its associated benefits. We know that our collective commitment is crucial, but we also recognise that there are a vast number of partners who will be equally important**.** If we get it right the whole region will benefit for years to come.

We are a long way ahead of most of the UK, but we still have a long way to go to be the very best. With the London 2012 Olympics focussing the attention of the world on the UK, we have a unique opportunity to make it happen. Let's grab that opportunity and make it ours.

Jeff Moore
Chief Executive
East Midlands Development Agency

Photograph taken for *emda* by Simon Bolton

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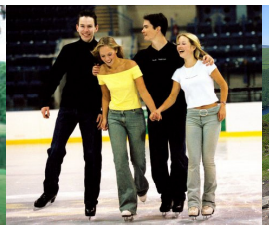

Introduction

This study has addressed a wide range of issues relating to the economic and socio-economic impact of sports tourism. The resulting report is not intended to be read from cover to cover – certainly not all of the sections will be of relevance and interest to all readers. Rather the sections should be read as largely independent, but related topics: a source of data and information for reference; and of ideas and strategies for future development.

As a result issues and recommendations that cut across many sections are repeated within the report. For those reading the whole report these issues and recommendations unavoidably appear over-emphasised by merit of their repetition.

The recommendations and opinions are those of the consultants and not necessarily of the commissioning agencies. They are presented for consideration. It is the decision of the organisations responsible whether and how to implement these recommendations.

Maximising the impact of sports tourism is a developing field and we recognise that the East Midlands, along with the rest of the UK and indeed the world, has a long way to go before it can claim to be extracting the maximum value from sports events and sports tourism. Only the commitment and hard work of many people will realise this potential. We welcome your views and input on any of the topics raised in this study.

If you, your colleagues, family or friends have an interest in, or a contribution to make to developing the impact of sports tourism in the region, then please contact your local representative. Contact details are contained in Appendix 14.

Part One: In a Nutshell

1. Executive Summary

The Regional Economic Strategy (RES) Destination 2010 sets the economic goals of the development agency and its partner organisations and is the key driver for the regional agencies. Sports Tourism is an integral part of those goals through the Tourism and Culture strand (strand 10) and through the Trade and Inward Investment strand (strand 5).

The overall objective of East Midlands Tourism (EMT) is to increase the economic impact of tourism in the region. The primary method identified for this is to increase the *value* rather than the *volume* of tourism, by increasing the number of overnight stays in the region and thereby the total spend per visitor in the region. Sport has a ready made market - the fans. These fans will spend large amounts of time and money to follow their sports: to watch and support their favourite teams and players and to play sport in their leisure time. Sports tourism is estimated to account for 5-10 per cent of all travel worldwide[1]. As one of the true strengths of the East Midlands region, there is huge potential to capitalise on and further develop this area of tourism.

The East Midlands already has most of the building blocks in place: top level facilities; regional agencies dedicated to sport, tourism, learning and skills and international trade; tourism providers; professional sports venues; a wide range of events crossing many sports from top international level to local participation events; and most importantly a critical mass of expertise able to deliver. Through the international reputation of Loughborough University the region is already synonymous with elite sport and sports academia.

The challenge is to create the momentum, and a forum, to allow these disparate organisations to work together to seriously raise the game in the region. The 2012 Olympic Games being awarded to London has helped provide the impetus to bring it all together, and has focussed attention on making it happen now.

To achieve this, effort and resource will be required from across the delivery agencies in the region – from EMT, *emda*, the Destination Management Partnerships (DMPs), the Sub-Regional Strategic Partnerships (SSPs), East Midlands International Connections (EMIC) and Sport England. These organisations must first recognise the value and opportunities for development, then develop specific plans for activities to deliver these benefits. An essential starting point is to create a leadership group drawn from these agencies to drive the strategic

[1] "The Business of Sport Tourism", Ross Biddiscombe, Sport Business, 2004

development and enable delivery of the wide range of benefits which are ready and waiting to be accessed. This group will need to guide the strategy and delivery for communication, networking, promotion and education between a wide range of providers - from sports academics to taxi drivers. The group must work on a regional, rather than sub-regional, basis and will also need to address how to work in partnership with other regions, and nationally, particularly with the opportunities available in the four years preceding the 2012 Olympic and Paralympic Games when an upsurge of interest and sports-related activities will take place in the UK. The East Midlands must be prepared and positioned to capitalise on this activity.

Many visitors to the East Midlands already come primarily for sports associated purposes, contributing an estimated £342 million in additional visitor expenditure alone[2]. The information we have collected through this project would suggest that this is a significant underestimate of the total economic impact of sports tourism. An estimated £100 million[3] economic impact is derived from promoters and visitors expenditure at sports events in the region. In addition over half of the £991 million[4] visitor expenditure in the Peak District and an estimated £30 million of the National Forest income is attributable to sports activities although not all of this is tourist related income, some being from local residents. On top of that, there are many top ranking sports facilities which attract visitors to the region for participation, holidays, coaching and business. These include Loughborough University, home to many elite level sports training academies; Holme Pierrepont and Rutland Water for watersports; a collection of the UK's top-ranked golf courses; and Center Parcs which has developed to fulfil the market requirement for active holidays to name but a few.

Previous studies on major events hosted in the region such as the Test Cricket at Trent Bridge[5] show that they bring a large numbers of visitors into the region and that a high percentage of these are return visitors. This is confirmed by our research at the Nottingham Open Tennis and at Burghley Horse Trials where many people had attended the events every year – in the case of Burghley for over forty years since the first championships in 1961.

There is potential to considerably increase the economic impact of visitors if resources are committed by *emd*a, EMT and the DMPs to the area of sports tourism, by:

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[2] East Midlands Tourism Fact Sheet 2

[3] This figure is given for indicative purposes only and should not be considered as a rigorously derived estimate. Unless otherwise determined through economic impact studies, events were categorised by sphere of importance (international/national/regional) and an average economic impact assigned to each in order to estimate the total value. Only events listed in the 2005 calendar of events were included. League fixtures were excluded from the assessment.

[4] 1998 Peak District National Park Visitor Survey

[5] Visit Heart of England study, England vs South Africa Test Match, 2003

- Hosting the 'right' events in the region.
- Developing events and attractions which are sufficiently 'special' to attract visitors from outside the region.
- Targeted marketing outside the region.
- Co-ordination of events, attractions and promotions and marketing to increase length of stay.
- Developing the supply chain to ensure that expenditure benefits the East Midlands.
- Using sports activities to develop international trade and inward investment.

To achieve these aims, we recommend that the following should be developed:

- Major events and sports tourism must be clearly identified as a core priority within East Midlands Tourism. This needs to be translated into regional and sub-regional strategic direction for delivery by the DMPs (see Section 5).
- A core team to ensure total package of benefits is delivered – this should comprise a leader from the sports sector in *emda* together with key staff in the tourism agencies, Sport England, regeneration agencies, education and learning skills, sub-regional strategic partnerships and East Midlands International Connections. This core group would drive the delivery of benefits through a wider team including the universities, major sports venues, local authorities and agencies, sports development agencies and tourism providers (see Section 5).
- A Sports Tourism forum to co-ordinate providers in key segments to engender co-operation, share best practice and raise standards and for venues and facilities to work together on supply side initiatives, marketing etc. (see Section 7).
- A Major Events strategy – encompassing sports, arts, music, food and wider cultural events. The strategy should target high economic impact events and co-ordinate timing of events (see Sections 10).
- A Sports Tourism Marketing strategy – need to understand the individual characteristics of the markets and develop a promotional strategy. This strategy should be as generic as possible, whilst incorporating the ability to tailor to individual sports and sporting events (see Section 11).
- Internet-based 'one-stop' shop for information and booking tickets, accommodation etc. At present Lincolnshire's DMS system is the most developed and should be used as a template for the other sub-regions (see Section 6).
- Supply side initiatives – including financial support for cluster group activities (see Section 15).

- Trade and Investment strategy to use sports events to showcase the region (see Section 15).
- Build links between SkillsActive, the sector skills council for active learning and leisure and the relevant existing sector skills and learning and skills councils. There is a need integrate the workforce development plan with the tourism and culture development plan (see Section 16).
- Ensure public sector financial support is dependant on delivering local economic and social benefits.

More detailed recommendations are presented in the following section. It is recognised that the list of recommendations is extensive. For many of the recommendations, however, the background work has already been done – what is required is to make use of that information. The recommendations, and the reasoning behind them, are expanded upon in the relevant sections of the report.

Conclusions

Sports tourism and sports events can be tools for the economic development of a region through wealth creation; by generating a positive image of the region for residents and visitors alike; and by increasing skill levels in the workforce.

Sport has a ready-made audience – the fans and the participants. The challenge is to make the East Midlands the place of choice for spectators, participants, professionals, people wanting to develop their skills and talents, and the holidaymaker. Unless sports tourism is a priority on the regional agenda, and sufficient resource is given to its development, these opportunities will be lost.

With the 2012 Olympic Games awarded to London, there is an urgent need to prepare and organise to ensure that this unique opportunity is embraced to deliver maximum short term and long term benefits to the East Midlands. The long term economic benefits of the Olympic Games will come from tourism and from building business expertise and relationships.

Sports Tourism is already a considerable part of the East Midlands economy. Through a structured and co-ordinated approach the opportunity exists to grow and develop this into a position of national leadership, with consequent economic and social benefits for all.

2. Recommendations

The recommendations are presented for consideration by the commissioning organisations and their partner agencies. If you would like a copy of the full report, including the recommendations and resource requirements, please contact the Sports and economic Development Manager at the East Midlands Development Agency.

3. Resource Requirements

The resource requirements are presented for consideration by the commissioning organisations and their partner agencies. If you would like a copy of the full report, including the recommendations and resource requirements, please contact the Sports and economic Development Manager at the East Midlands Development Agency.

Part 2: Background Information

4. Background to the Study

This study, commissioned by the East Midlands Development Agency, is designed to inform the regional tourism, economic and skills agencies of the current and potential benefits of sports tourism to the East Midlands region and to develop strategies to maximise those benefits.

Previous studies into the economic benefit of sports tourism tend to concentrate either on the additional benefit of individual major events, or on the economic benefit of a single sport to an area. Very little previous work has looked at overall benefit of sport tourism to a region. It is not the aim of this study to map sports tourism in the region. The emphasis of the study is to provide a baseline of information in order to develop strategies to increase the economic impact of sports tourism. As a result, the most important findings and recommendations are those that are generic to many, or all, of the sports tourism events, sports and activities. Individual 'tailored' interventions are time consuming and only cost-effective for only the largest events, sports or venues.

As part of this study, the economic impact of four sports events were evaluated along with the value of golf tourism to the East Midlands. The required steps to develop the economic benefits are discussed along with any percieved or real pitfalls. Finally, ways in which sport, and particularly major sports events, can be used to support the wider agendas of inward investment, trade and business development, skills development, lifelong learning and regeneration will be highlighted.

5. East Midlands Strategic Context

Summary

Sport is recognised within the East Midlands as an important contributor to the economy. Sport tourism already accounts for an estimated £342 million additional expenditure in the East Midlands and is a growing sector of the tourism market worldwide. Sports tourists represent a high value sector of the market, spending more per day than the average tourist.

Past studies of events in the region have shown that the Silverstone Formula One Grand Prix and the Donington Park Motorcycle Grand Prix result in additional visitor expenditure in the region of £10-15 million each. Test Match cricket at Trent Bridge and the Rockingham 'Days of Thunder' series also have economic impacts in excess of £1 million. These events bring hundreds of thousands of tourists to the region.

Sport is identified in the strategies of a number of East Midlands regional bodies: the Regional Economic Strategy: Destination 2010; the Regional Tourism Strategy: Destination East Midlands; Sport England's 'Change 4 Sport'; East Midlands International Connections Action Plan; and some of the sub-regional strategic partnerships. These need to be co-ordinated and a clear way forward provided to deliver the benefits.

5.1 Overview and Strategic Context

Recognition of the value of sport tourism to the tourism industry has increased in recent years with a number of economic impact studies having being carried out on major events worldwide. Within the East Midlands, a recent study has highlighted the value of the sports economy[6]. Furthermore, economic impact studies in the East Midlands in 2003 showed that the Motorsport Grand Prix at Silverstone[7] resulted in an additional expenditure of £15.6 million and 403 FTE jobs in the local economy. In 2004 the motorcycling MotoGP at Donington Park was studied. Additional visitor expenditure within a 25 mile radius of the circuit was estimated at just under £10 million[8]. The cricket test match at Trent Bridge[9] and one of the 'Days of Thunder' motor race series[10] at Rockingham each resulted in an additional £1.1 million expenditure within the region. These four events alone bring a quarter of a million tourists to sports events in the region.

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[6] "The Value of the Sports Economy in the Regions in 2000; East Midlands", Sport England
[7] MIA study, 2002. Figure given is for additional expenditure in a 50 mile radius of Silverstone.
[8] *emda*, Cinzano British Motorcycle Grand Prix, 2004
[9] Visit Heart of England, England vs. South Africa, 14th – 18th August 2003
[10] MIA Study, July 27th, 2003

emda, East Midlands Tourism and East Midlands International Connections have identified tourism and sport as major contributors to the economic growth potential of the region. Bringing people to the region will help develop the prosperity, employment and quality of life for the inhabitants, and raise the profile of the region. It will also help develop trade and inward investment.

The East Midlands is particularly targeting sports and sports tourism in its regional strategies.

- The Regional Economic Strategy, 'Destination 2010', has three key activities related to sport in the Tourism and Culture strand (strand 10). The aim is to increase the value, rather than the volume, of tourism by increasing the average spend per visit, by for example increasing the number of overnight stays. Sport can also aid the key activity of promoting the British Midlands 'brand' internationally to further international trade and inward investment goals (strand 5) and specifically targets increasing the value and volume of international tourism. The regional tourism strategy and the regional international strategy are aligned with these key economic priorities.
- The East Midlands Regional Tourism Strategy 'Destination East Midlands' identifies 'Encouraging events and festivals' and 'Stimulating sports tourism' as key strands for delivery. The region has a wide variety of sports tourism opportunities; the infrastructure strengths and sports expertise concentrated in the region offer significant opportunities for sports tourism to deliver economic benefits to the region. To support this, a directory of the major sporting events and facilities in the region has been compiled. Furthermore, a number of the board members of the newly created East Midlands Tourism (EMT) bring considerable expertise in the sports tourism sector from previous roles such as managing Center Parcs, health and fitness clubs and Nottingham County Cricket Club.
- Sport England East Midlands' "Change 4 Sport" highlights the need to work with *emda* to maximise sport tourism is highlighted particularly in relation to the Peak District National Park and the National Forest.
- The East Midlands International Connections Action Plan has both tourism (including sports tourism) and sports as major areas for international development.
- Nottingham and Nottinghamshire Tourism Strategy recognises that investment in top-class sports infrastructure has resulted in Nottingham being arguably second only to Manchester in regional sports cities and that audiences and participants in sports events constitute a sizeable proportion of the city's hotel bookings and tourism spend.
- The National Forest and Peak District National Park tourism strategies recognise sports tourism as a major contributor to current activity and as a growth sector.

Most SSPs have set specific tourism and/or sport tourism objectives. For the others, it is implicit in the overall economic and social objectives.

- Leicestershire Economic Partnership recognises sports and tourism as two of the nine key groupings which offer the most tangible benefits for the long term future of the economy.
- Alliance SSP Business Plans sets out the potential for development of a motor cross facility at Rufford to increase the sports tourism potential and address the issues of social exclusion and environmental damage created by the informal use of the facility.
- Northamptonshire Partnership recognises the importance of the motorsports sector to the economy and the need to increase rural diversification through tourism.
- Greater Nottingham Partnership has sports facilities and tourism as part of the nine strategic objectives in the 2003-4 business plan and details sport as a driver for economic growth and regeneration.
- Welland economic strategy 2003-2006 recognises the need to develop tourism in the region and highlights the importance of walking, equestrianism[11] and cycling.

For the sub-regional destination management partnerships (DMPs), sport is one of the strengths identified in the region. As such, maximising its economic impact is of paramount importance. With the emergence of the DMPs the value of sports tourism must be widely recognised throughout the organisations and sufficient emphasis placed on its development in the overall mix of the DMPs' priorities.

5.2 How important is Tourism?

Recent figures released by the World Travel and Tourism Council (WTTC) show that personal travel and tourism in the UK is currently worth £95 billion, and forecast to grow faster than the rest of the economy to reach £150 billion by 2014[12]. UK business travel is similarly forecast to grow, from £22 billion to £34 billion in 2014. Currently over 1 million people are directly employed in the travel and tourism industry in the UK.

Tourism in the East Midlands[13]

Annual Value	£5 billion
% of GDP (1999)	3.5
No of Businesses	30,000
No of people employed	200,000

[11] See Equestrian Strategy, Leicestershire County Council
[12] WTTC Report, 2004
[13] Destination East Midlands, The East Midlands Tourism Strategy 2003-2010

The Regional Economic Strategy has set targets to increase this to 4.5% of GDP by 2010, in other words by an additional £1.4 billion. The strategy concentrates on increasing the value rather than the number of visits. The RES target is to increase the average spend per visit by 2% by 2010, in part by increasing the number of overnight stays – currently only 10% of all visits.

Tourism from overseas markets into the East Midlands is relatively low with only 1% of all visits (960,000 trips) being made by overseas visitors. The main overseas markets are USA, Germany, France and the Irish Republic. Sports events, particularly mass participation events have the potential to significantly increase these figures. This year one world participation event came to the region: the world cheerleading championships, with 3,000 entrants from all over the world. One day of the World Firefighter's Games, being hosted in Sheffield with 4,000 participants, took place in the East Midlands. These events not only bring thousands of competitors from all over the world in to the region for a number of days, but also have a multiplier effect with many competitors travelling with their families thereby dramatically increasing the number of bed nights and spend in the region. These visitors should be encouraged to stay in the region before and after the event by targeted destination marketing. This will be addressed in greater detail in sections 9 and 10: Sports Events.

5.3 How important is Sport to the East Midlands?

A recent study[14] has concluded that sport accounts for £1,391 million GVA to the East Midlands and 45,799 FTE jobs in over 4,200 sports related businesses. This represents 2.4% of total employment and 2.28% of regional GDP. Whilst sport is extremely strong in the East Midlands with a high proportion of elite athletes and experts in sport performance being based in the region, the breadth and depth of its strengths are relatively unknown across the UK and overseas.

5.4 How important is Sports Tourism?

Data on sports tourism is relatively limited and difficult to interpret since the definitions of 'sport' and of 'sports tourism' are not universally agreed. This leads to a wide differences in the scope of studies and therefore in the figures quoted. The differentiation between sport being the *purpose* of the visit, as opposed to sporting activity being undertaken whilst on the visit is not always clear[15].

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[14] "The Economic Impact of Sports in the East Midlands", *emda/*KKP and York Consulting, 2004

[15] Estimates of participation rates in sports whilst on holiday are up to 80% in Germany (1990); "Sport Tourism" Standeven and De Knop, 1999

Despite this, sports tourism is universally acknowledged as a growing market worldwide and there are increasing numbers of people taking sports holidays and activity-based short breaks as demonstrated by the success of Center Parcs. Sports tourism is estimated at 5 - 10% of all travel and is one of the fastest growing sectors in the tourism market[16]. 560,000 overseas visitors to the UK in 2002 said that sport was their **main** reason for visiting the UK. Sports tourists also spend more per day than average: for overseas visitors to the UK in 2002, sports tourists spent 47% more per day than average.

Sports Tourism

For this purposes of this study, we have defined sports tourism as travel with a sports related activity as the main reason for the trip.

- To participate in a recreational sport activity including multi-activity sports camps and resorts
- To watch a sports event
- To take part in an organised sport event
- To train or be coached in sport or sport related activity
- To travel for the business of sport
- To attend sport related conferences or seminars
- To visit sports museums, stadia and venues

The definition of 'sports' is broad, encompassing what are termed 'soft' or lifestyle sports (hiking, cycling, walking) and 'hard' sports (kayaking, sky-diving, climbing, skiing). In the UK, sports participation holidays, as opposed to spectator sport, are more likely to fall into the former category as a result of the facilities available.

As a young industry, reliable statistics on the value of this emerging sector are not readily available, but sources agree that the sector is experiencing rapid growth[17]. East Midlands Tourism estimates that over 10% of leisure visitors came to the region primarily for sports related purposes, contributing £342 million additional spend to the region[18]. From our study we would consider this to be a significant underestimate of the economic benefit to the region.

[16] Estimates for UK include: 12% of all holidays (English Tourist Board 1992, Leisure consultants 1992); 22% (Mintel International Group, 1995); 25% (West Country Tourism Board, 1992) and 26% (UK Tourism Survey 1992). Other sources suggest 10-20% of all holiday tourism is for the purpose of sport.
[17] See: "The Business of Sport Tourism", Ross Biddiscombe, Sport Business, 2004
[18] East Midlands Tourism Fact Sheet 2

Walking, cycling, golf, water sports and outdoor sports (climbing, pot-holing etc.) are strong leisure sports within the East Midlands. Competitive sports events have an economic impact by virtue of participants and spectators visiting the region. From our studies and previous economic impact studies undertaken, we estimate the total economic benefit to the East Midlands from organised sports events to be in the region of £100 million[19]. Sports training is also particularly strong with many elite athletes and squads using the specialised facilities at Loughborough University, at the English Institutes for Sport and National and Regional sports centres for training purposes.

The East Midlands regularly hosts many internationally important sports events, along with nationally and regionally important events. In 2004 there were 29 internationally important events, 26 of which are regularly held in the region[20]. These events are a mixture of spectator sports and mass participation sports, such as the BCA International Cheerleading Championships which attracted 3,000 competitors to the region for 3 days.

Finally, the region is extremely strong in sports science: for example in sports psychology, equipment engineering, sports medicine and biomechanics. The main centres of excellence are Loughborough University and Queen's Medical Centre. There is, as a result, a sports 'business tourism' market based on conferences, seminars and workshops which we estimate to be worth £ 2.25 million per annum. This figure does not include the many training and coaching weekends held for sports clubs at venues such as Holme Pierrepont, nor the economic benefit of individual trips made by other professionals to visit the centres of excellence.

Conclusion

If East Midlands is to meet its targets for increased tourism, significant growth will be needed. Sport is a particularly good candidate for achieving rapid tourism growth, because it can include large events aimed at a market that is already sold on the product (the sports fans). But it will only make a significant contribution if these events and associated activities have a large economic impact. This requires a combination of hosting the 'right' events *and* extracting the value from those events.

[19] This is indicative only and should not be considered a rigorously derived estimate. Unless otherwise determined through economic impact studies, events were categorised by sphere of importance (international/national/regional) and an average economic impact assigned to each in order to estimate the total value. Only events listed in the 2005 calendar of events were included. League fixtures were excluded from the assessment.

[20] See: "Directory of Major Sporting Facilities and Events in the East Midlands", *emda* / Grey Panther Associates, 2004

6. Trends in Tourism

There are a number of trends which directly impact on the potential for sports tourism development in the East Midlands:

- Increased trend to short breaks.
- Time poverty – need for a one-stop shop to book all requirements.
- Increased use of internet for information and booking.
- Increased use of low-cost airline routes.

6.1 Short breaks

Research has shown that the travel time for short break holidays is generally limited to a 2-hour maximum. This dictates the target market for many aspects of sport tourism unless the regional attraction is so 'special' that people are prepared to travel for longer. The accessibility of venues and attractions is therefore critical and due consideration must be given to this factor when determining target market catchment areas. Facilities such as the Princess Royal Arena in Boston need to consider travel times when assessing their marketing strategies. The 1 and 2 hour driving travel time to the East Midlands boundaries are depicted in Figure 1 below. Similar maps for the individual counties are contained in Appendix 1.

6.2 Time poverty

There is a need for better co-ordination of events, accommodation, transport and information on other attractions in the region in order to attract visitors to events, tempt them to stay overnight and combine the primary purpose of their trip with additional attractions in the region.

6.3 Increased use of the internet for information and booking

Currently many of the sports events internet sites have no or very limited links to accommodation, maps, transport, or wider regional information. It is imperative that the event organisers are given all the help and information they require to add (as a bare minimum) a link to the DMP website which contains all the required information and booking in a readily accessible manner. The DMPs should work across the whole sector to develop packaged offerings combined with multimedia distribution and e-marketing and communication channels.

Figure 1: Map of drive times to the Boundary of the East Midlands Region

Under 1 hour | 1 – 2 hours | Over 2 hours

6.4 Increased use of low cost airlines

With the bmibaby hub at Nottingham East Midlands Airport, there is a major opportunity to expand the overseas market into destinations served by this low-cost airline. Coventry, Finningley Robin Hood, Manchester, Luton and Stansted airports will also be important low-cost routes for visitors. Just outside the region, North Sea Ferries operates overnight ferry crossings into Hull from Belgium and Holland. The DFDS service from Scandinavia, Holland and Germany into Newcastle and Harwich are not so convenient for the East Midlands which is unfortunate as these markets have proved highly successful for sports tourism in Newcastle and Leeds.

Conclusions

The DMPS must address the sports tourism sector as a whole and work with event and facility providers to:

- Understand the evolving market requirements.
- Tailor and promote the offering to key market sectors in an easily accessible form.

In particular, the DMPS must develop user-friendly ICT packages that allow visitors to access information quickly and easily and to book travel, accommodation and tickets.

Part 3: Findings

7. Potential Benefits of Sports Tourism – The Balanced Scorecard

Sports Tourism has the potential to deliver a range of benefits, both economic and social, if approached in a co-ordinated manner and if given sufficient priority within the partner organisations. These include:

- Direct economic benefit to region from profitable events/ attractions.
- Economic benefit to business and transport providers, accommodation suppliers, restaurants, retail, and other attractions.
- Economic benefit to wide range of regional businesses from local supply chain initiatives, both at regional events and further afield by developing links to event organisers and sponsors.
- Local employment.
- Local skills development – through employment, volunteering and training.
- Use of events to showcase regional industries.
- Profile of the region improved – raises awareness which will have indirect benefits though increased tourism and inward investment potential.
- Quality of life for local residents improved.
- Sports Development – raises interest and participation levels in sport, encourages volunteering.
- Education – potential to tie into National Curriculum.

In order to maximise these benefits, all areas need to be considered at a strategic level with a view to hosting sports events, whether championships or conferences. The 'balanced scorecard' is a simple technique that sets the framework for developing a process to ensure the aims and objectives that matter are identified and measured. The balanced scorecard groups these aims; for example, one such group might measure delivery based on a financial perspective. The balanced scorecard below shows how the different outcomes possible from a sports event fall into the remit of different organisations. This is an illustrative example only and would need to be tailored with specific measures and organisations charged with their delivery in order to be a useable tool.

Sport has a ready-made audience – the fans and the participants. The challenge is to make the East Midlands the place of choice for spectators, participants, professionals, people wanting to develop their skills and talents, and the holidaymaker.

Figure 2: Sports Events – Balanced Scorecard

Event Success ***Organisers*** • Attendance • Quality • Visitor Satisfaction • Safety / Security • Event Finance • Future sustainability	**Financial** ***emda (also: EMT, EMIC, DMPs, SSPs, Cluster Groups)*** • Local Supply Chain • Tourism Income • Business Development • Trade Development • Inward Investment
Sport Development ***Sport England, Sports Partnerships*** • Participation at Event • Attendance at local facilities • Schools Involvement • Skills Courses • Game Plan Targets	**Social** ***Regenerate East Midlands, Local Authorities, Skills Councils*** • Skills Development • Employment • Environmental / sustainability • Regional Image • Regeneration

8. The Potential from the 2012 Olympic and Paralympic Games

Summary

The 2012 Olympic and Paralympic Games will lead to an increased level of visitors to the UK, not just London, through:

- Rise in general tourism due to higher profile of the country for many years before, during and after the Games.
- Elite athlete training and holding camps from 2008 to 2012.
- Increased number of international sports events in the UK and higher numbers of athletes participating in existing events as athletes compete in the UK for acclimatisation from 2008 to 2012.

In order to benefit from the tourism impact of the London 2012 Olympic and Paralympic Games the East Midlands must:

- Audit its capabilities and position itself to host training and holding camps.
- Select target countries for training and holding camps based on long-term criteria.
- Target attracting new major competitions to the region from 2008-2012.
- Network with LOCOG Nations and Regions Group.
- Influence and benefit from the Olympic Tourism Strategy.

Key Recommendations

The East Midlands has true strengths over the other regions of the UK in many areas of sport. These strengths must be rigorously evaluated, compiled and communicated in order for the region's competitive advantages to be understood, valued and - most of all - used to maximum long term benefit of the region.

8.1 Introduction

Whilst it was never the intention of this project to study the potential tourism impact should London be awarded the 2012 Olympic and Paralympic Games, such a unique, time-limited opportunity must be addressed. This section will therefore concentrate on findings from recent Olympic and Paralympic Games and a brief description of the tourism opportunities for the East Midlands offered by the London 2012 Games.

8.2 Overview

The tourism impact from the Olympic and Paralympic games comes from four main sources:

- Increased media profile attracts visitors for years before, during and after the Games.
- Training and holding camps for elite teams from 2008 to 2012.
- Increased number of international competitions in the UK.
- Existing competitions will attract higher numbers of athletes from 2008 to 2012.

It has been estimated that between 50% and 75% of the long-term net benefit of staging the Games, measured over a 7-10 year period, is due to increased tourism. Estimates of the potential direct benefit to the UK economy from the 2012 Games are over £2 billion. [21]

8.2.1 Barcelona 1996

Based on data from 1990 to 2001, Barcelona doubled its number of visitors from 1.74 million to 3.38 million per year. The percentage of non-Spanish visitors also increased over the same period from 49% to 69%, which contributed to an increased number of overnight stays.

8.2.2 Sydney 2000

Sydney has reported an increased level of tourism valued at £2.5 billion from an additional 1.6 million visitors as a direct result of the Sydney 2000 Games.[22] The tourism website has experienced a 700% increase in web traffic. [27]

The scale and quality of sports venues in Sydney has allowed the city to develop its sports tourism through a targeted programme of events. As well as a number of major national events, Sydney has hosted many international events since 2000 including the 2000 Pacific Schools Games, the 2002 Gay Games and has been chosen to host the largest sub-elite event in the world attracting 25,000 – 30,000 participants, the World Masters Games in 2009.

8.2.3 Athens 2004

Estimates for tourism impact of Athens 2004 include:

- 6 million additional foreign tourists over the 14 year period 1998 – 2011
- Additional income of $10.6 billion from above tourism[23]
- Tourism will contribute $140 million in 2004 alone – made up predominantly from 2 million accommodation nights for visitors during the period of the Games[24]
- Sustained tourism benefits: 10% higher visitor numbers in 2005 than 2004[25]
- The tourism benefit is spread throughout the country, not just in Athens[31]

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[21] Ken Robinson CBE FTS, TMI presentation, 2005
[22] Professor Chris Gratton, Sheffield Hallam University
[23] George Karis, University of Ottawa, Canada
[24] PriceWaterhouseCoopers
[25] Costas Cartalis, Secretary to the Athens Olympic Games, 2005

8.3 The East Midlands

The range of elite sports training facilities in the East Midlands should give rise to huge opportunities for the four years running up to the 2012 Games – from increased interest and participation in existing events; attracting new events in the run up to 2012; and hosting training and holding camps before and during the Games. The challenges are to make the most of these opportunities and to ensure that the East Midlands also benefits from the increased level of general tourism resulting from the Games.

8.3.1 Training and Holding Camps

A requirement for all major events, in addition to the venues themselves, is the provision of world-class training facilities for the athletes. The East Midlands area excels in this, particularly in the sports complex at Loughborough University, but also at the other centres of excellence in the region including the Nottingham Tennis Centre, the National Watersports Centre at Holme Pierrepont and the equestrian facilities at Burghley House.

Countries now prepare for competitions by way of training and holding camps. These camps allow the athletes to acclimatise and prepare physically and mentally for the competition ahead. The location for the holding camp is identified years before the event, and that venue is used as a base for training camps during the four years leading up to the Games.

The British Olympic Association is acknowledged as setting the standard for training camps and they should be consulted. Teams will already be visiting potential locations to base their training camps. To maximise the benefit, venues in the East Midlands must understand the requirements and position themselves to meet - and demonstrate their strengths in meeting - these requirements. Part of this positioning is to understand which countries/sports they most want to attract to the region with a view to longer term links – sporting or trade. Provision of excellent training camps can have much longer term benefits: if a team is happy they will come back, after the Games, whenever they need to train in that geography/climate. Requirements for holding and training camps include:

- Geographically distant from the competition venue.
- Requisite training and medical facilities.
- Good accommodation and food (the definition of which will vary by nationality/sport).
- Good transport links to the competition venue.
- Positive distractions from the stress of the competition and to prevent boredom.

The East Midlands needs to prepare a technical audit of facilities to understand which sports it can host and how many teams/athletes it can accommodate for both Olympic and Paralympic

events. The focus for this must come from *emda* and build on work already done.[26] Other RDAs are already active: Yorkshire Forward, Advantage West Midlands and the South West Development Agency have published strategies for various aspects of 2012.

8.3.2 Pre-Olympic Competitions

As well as training camps, the London 2012 Games will result in an increased number of Junior, European and World Championships being held in the UK between 2008 and 2012. The East Midlands should position itself to host these events through the following activities:

- *emda* to evaluate what is 'special' about the East Midlands –facilities, expertise and sports heritage which together give the region a competitive advantage to host events.
- Working with international sports governing bodies and/or UK sport to target hosting junior, European and World events. Much of the background information to understand the requirements for such events has already been compiled.[27]
- Detailing/developing the range of flexible venues possible to host the events.
- Working with neighbouring RDAs to jointly host events where facilities are lacking in the East Midlands (for example with the Don Valley Stadium in Sheffield).

8.3.3 General tourism benefits

Previous Olympic Games have shown that the media attention and profile of the host country leads to an increased level of tourism for years before and after the Games themselves. The East Midlands needs to position itself to benefit from this. The London Organising Committee for the Commonwealth Games (LOCOG) is committed to ensuring that the benefits of the Games spread across the UK and are not confined to London. This includes the tourism benefits. The Olympics Tourism Strategy is currently being prepared[28]. Past Games have shown that the potential benefits can only be achieved by:

- Thorough pre-planning.
- Definitive, agreed strategies.
- Establishment of appropriate mechanisms.
- Realistic timescales.
- Adequate budgets.

The East Midlands needs to be part of the planning and support process to ensure it captures a significant profile in the overall strategy.

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[26] "Directory of Major Sporting Facilities and Events in the East Midlands", *emda* / Grey Panther Associates, 2004
[27] As above
[28] Ken Robinson CBE FTS, ongoing

9. Previous Economic Impact Studies of Sports Events Worldwide

Summary

Many economic impact studies have been carried out on events worldwide. Their scope and methodologies vary, and some have been guilty of exaggerating the economic benefit. As a result it is not possible to directly compare different studies. It is more useful to consider events as falling into scales of economic impact and to understand the underlying factors that determine the economic benefit.

The main direct economic benefits result from attracting visitors to the region for overnight stays in commercial accommodation. Moreover, the further a visitor has travelled the higher their daily expenditure. The most beneficial events are therefore ones that bring visitors – spectators or participants and their supporters – from afar for the longest number of days. These are not necessarily the highest profile events, nor elite sports events. By co-ordinating and co-promoting individual events, the length of stay of visitors can be extended.

The results of previous studies demonstrating the economic impact of sports and sports events to the tourist economy are shown in Appendix 2. Some caution needs to be exercised when comparing data such as this. Methodologies vary widely and there has been a long recognised trend to over-estimate the economic importance of events. Unless otherwise stated, the figures represent additional expenditure generated by the event, rather than the total economic impact of the event which includes costs associated with construction and staging of the event. Since it is not possible to directly compare events unless the scope and methodology used is known to be the same, the results are best considered in general categories:

- Global-scale, multi-billion pound events such as the Olympic Games.
- International events such as Euro 2004 Football Championships, generating in the region of £100 million.
- Multi-million pound international events such as Formula One motor racing.
- 1 million pound events such as cricket test matches.
- Few hundred thousand pound events such as British Open Squash Championships.

Even the smaller regional events can have significant economic impact since they are often annually recurring events and by the total weight of number of such events within the region.

From a tourism perspective, only additional expenditure flowing into the locality from non-residents should be taken into account. It is assumed that for local residents, the money would be spent within the region on other goods and services in the absence of the expenditure on the sport/event.

A number of conclusions can be drawn from examination of the results of past studies:

- The greatest economic benefits come from events that attract visitors (spectators or participants) from afar resulting in expenditure on overnight accommodation, food, drink, and further expenditure on merchandising and entertainment. Clearly the greater the number of such visitors, the longer they stay, and the more they spend per day combine to determine the overall economic benefit.
- World scale and international events have the largest economic impact due to the number of visitors and the duration of the event. They also require the greatest investment and therefore the highest economic risk.
- Mass participation events can have a greater economic impact than spectator events due the large number of incoming competitors requiring accommodation and food, particularly if run over several days and augmented by accompanying family members.
- High media profile events do not necessarily have the greatest economic impact: the world badminton championships in Glasgow in 1997 had a ten-fold greater economic impact than the Grand Prix athletics held in Sheffield in the same year, partially due to the short duration of the athletics event resulting in spectators visiting in a day trip.
- The combined effect of events and sports, even relatively low impact individual events, can be highly significant either by weight of numbers or, more particularly, by coordinating attractions to prolong the visitors' stay in the region.
- Individual participation sports can have a very significant economic impact on a region through tourism.
- When planned and co-ordinated, major sports events can be used as a vehicle to drive international trade. This will be further discussed in Section 15.

It is important to note that from a *tourism* perspective, league fixtures in all sports are generally assumed to have a net zero economic impact since the money earned from the visiting away fans is cancelled out by the home fans (and their money) attending the return

fixture. In addition, for many sports, only a relatively limited number of away tickets are made available to the travelling team. This is not to minimise their importance to the economy or local community; the supply chain and employment involved in the hosting of the match and the travel and hospitality industries benefit from the event, but a large amount of this comes from the local population rather than 'new' money and as such does not register as *additional tourism* expenditure. The local economy also benefits from the retention of local money that might otherwise be spent outside the locality.

Sport events are not alone in achieving economic benefit to a region through tourism - clearly music, the arts and regional festivals can also draw visitors in from afar. Economic impact studies of these events are less frequently reported, but some examples are listed in Appendix 3. Given the different methodologies involved, it is not possible to draw meaningful comparisons between the relative value of sports, arts or music events. To do so would in any case suggest that some are 'better' than others whereas a region should be aiming for a rich mix of events[29]. Clearly a major art exhibition, or music festival can have a similar economic impact and put the region 'on the map' in the same way as a sports event. It is true, however, that major sports events will tend to have greater mainstream media coverage than most arts or music events.

[29] Some research carried out in the United States has suggested that the economic impact of sports events is likely to be higher than for festivals, but this cannot be taken as universally applicable. J Crompton, "Measuring the economic impact of visitors to sports tournaments and special events" (1999); J Crompton and S Mackay, Measuring the economic impact of festivals and events: some myths, misapplications and ethical dilemmas (1994).

10. Spectator Sports Events

Summary

In order to maximise the economic and social impact of sports events, the East Midlands needs to

- Capitalise on the existing events in the region.
- Understand which events to target for the region to deliver the greatest economic and social contribution.

Across all the events we studied we found three main areas of focus to improve the economic impact:

- Attract an increased proportion of visitors from outside the region, especially aimed at increasing the number of overnight stays in the region
- Supply chain management: to increase the value of the event to regional businesses.
- Use the event to showcase the region and its industries.

10.1 Overview

The East Midlands hosts a large number of prestigious events each year – international spectator events such as the F1 Grand Prix at Silverstone and high quality amateur events such as the National Championships Rowing Regatta which attract participants from all over UK. These sit alongside the 'regular' events like football, rugby, ice hockey and horse racing which provide employment and income year-round. These events generate a multi-million pound industry benefiting the East Midlands in the region of £100 million per annum and raising the national and international profile of the region.

To deliver growth, increased benefits need to be derived from existing events as well as attracting new events. The opportunities need to be assessed to identify which match with the East Midlands strengths to deliver the highest impact. Whilst there is a need to be ambitious, plans must be realistic to ensure that the focus is on achievable objectives. Attraction of visitors from outside the region to these events, particularly if it includes an overnight stay, will result in a very considerable economic impact.

Different events can have very different economic impacts per visitor. Estimates of average visitor spend at sports events are shown in Table 1 below[30].

[30] UK Sport: Measuring Success 2

Table 1: Average visitor spend at sports events

Visitor Type	Average Daily Expenditure (£)
Competitors *(range shown below)*	55 - 60
○ Cricketers	113
○ World Half Marathon	46
Officials	70
Media	100 +
Spectators *(range shown below)*	50
○ Junior Swimming	86
○ IAAF Athletics Grand Prix	10

So events which deliver the highest economic impacts are those with:

- large numbers of officials, media and competitors not paying their own expenses, and
- sports with large numbers of high spending spectators.

The reasons behind the high spend must be understood: multi day events require overnight stays by competitors, officials and media. The impact of junior competitions and mass participation events are often multiplied by a large number of supporters accompanying the competitors.

A recent study of the events scheduled in the East Midlands for 2004[31], shows that 29 events classified as of international significance took place in the region. Of these, 26 can be considered regular features in the region. This equates to one event of international significance every 2 weeks. In addition to these, a further 115 are classified as of national significance (not including league football, rugby, ice hockey or hockey fixtures). Again this equates to over 2 events of national importance per week in the region. A further 377 events of regional importance are scheduled for 2004, although the tourism economic impact of these will be limited as most expenditure will be generated by regional residents, which is not included in tourism figures. There is nonetheless an economic impact of these events due to the costs of staging the event, particularly if the supply chain favours local companies.

[31] "Directory of Major Sports facilities and Events in the East Midlands", *emda* / Grey Panther Associates, 2004

We need to examine two main areas:

(i) How to capitalise on the events already in the region.

(ii) Which events are most desirable to attract to the region, bringing the greatest economic contribution.

10.2 How to capitalise on the events already in the region

During this study, we have investigated the impact of four events in depth: Burghley Horse Trials, the Nottingham Open Tennis, British Open Squash and the Nottingham Cup international synchronised ice skating. These events were chosen as they cover a wide variety of event types:

- The Burghley Horse Trials is one of the three Grand Slam Events in the world for 3-day eventing and has been held annually since 1961. It represents sport at its highest level and has developed to attract visitors well beyond the sport itself.
- The Nottingham Open Tennis is a Tier 2 international event and has been held at the Tennis Centre for 11 years. This is a less prestigious event, but in an extremely popular spectator sport. It is, however, characteristic of tennis events – apart from Grand Slams - that fans do not travel far to watch as a result of the large number of events held annually.
- British Open Squash. This event is known as the 'Wimbledon of Squash'. Until very recently, it was one of only two opportunities to see world-class squash played in the UK. This rarity factor meant that fans were prepared to travel large distances to attend. As such it represents a top quality event in a minor sport (from a spectator perspective). The event has been held in many cities across the UK over the years, and 2004 was the second successive time it had been hosted in Nottingham.
- The Nottingham Cup synchronised ice-skating is an example of the relatively minor competitions that venues must host on the road to being awarded a major event. Ice-skating itself is a minority interest sport in the UK, synchronised skating even more so. The interest in studying this event was to uncover the economic impact to Nottingham of an event which at the venue is likely – at best - to break even financially, but is regarded as investment for future events.

In this section an overview of, and learning points from, all the events is presented. A more detailed insight into each event is contained in Section 11.

There is scope in all the events, to improve the economic impact to the region by a mixture of:

- attracting an increased proportion of visitors from outside the region, especially aimed at increasing the number of overnight stays in the region;
- supply chain management; and
- using the event to showcase the region and its industries.

The responsibility for driving these improvements will primarily lie with the sub-regional DMPs. For all events, separate reports have been produced. In this report we aim to summarise the key findings and recommendations rather than to evaluate the event in depth. Whilst events vary in their size and economic impact, many of the principles underlying maximising the economic benefit are common to all.

Strategies to tie activities together, thereby involving an overnight stay and/or additional expenditure, have proved highly successful in increasing the value per visit in other regions. This can be achieved by either co-ordinating the timing of events likely to attract similar audiences, or packaging events together with a leisure activity. For example offering packages combining the Motorsport Grand Prix with a golf day may prove popular, particularly with corporate visitors. Henley Royal Regatta, which attracts visitors and competitors from all over the world, is followed immediately by the Henley International Music and Arts festival. Not only is there an economy by using the same marquees and facilities, the primary aim is to tempt international visitors to stay in the Henley area for longer. A Great North Run Cultural Programme runs alongside the event itself with priority for tickets given to Great North Run members. Coventry is hosting the World Children's Games in 2005 and has arranged the timing so that the annual Godiva festival follows on from the Games, again with the aim of encouraging visitors from all over the world to extend their stay in the Coventry area. At this year's Nottingham Open tennis tournament, a group from New Zealand had stayed on after the Test Match in order to attend the tennis. Without this coincident timing, they may not have made the journey for just one or other event, or may have stayed in the area for a shorter period of time.

Conclusions

The two main objectives are:

- To increase the number of visitors from outside the region, particularly with the objective of increasing the number of overnight stays; and
- To increase the value of the event to regional businesses

Whilst the events we have studied vary in detail, many aspects are common to all. Detailed recommendations and action plans are contained in the individual event reports. The common recommendations to achieve the two main objectives are:

Key Recommendations

- Co-promote with regional attractions and accommodation (including health spas and hotels with sports facilities) and facilitate bookings to encourage overnight stays.
- Co-promote with transport providers (bmibaby, North Sea Ferries).
- Where possible organise events (sports and cultural) to follow on from each other to encourage longer visits in the region.
- Ensure the power of ICT for promoting the region and the events is fully exploited.
- Use positive feedback from visitor surveys to promote event.
- Targeted marketing at areas within 2 hours travel with low attendance (for example Manchester and Birmingham conurbations for the tennis).
- Co-ordinate marketing with other regional events to increase value of existing promotional routes at low additional cost.
- Audit supply chain for determine opportunities for regional companies.
- Use event to showcase regional industries (e.g. East Midlands Fine Food Forum).
- Use event to showcase the region to international business (inward investors and potential export market).

10.3 What events should we be targeting for the region?

In addressing this question only the economic benefits have been considered, not social or sports development issues. Analysis of the economic benefits of major events tabulated in Appendix 2 show that, in order, the major benefits are derived from:

- World-scale events such as the Olympic Games or the Football World Cup.
- High-profile sports that can attract significant sponsorship, media and advertising income such as F1 Grand Prix.
- Mass participation events, such as the London Marathon. This is addressed in more detail in section 12, on participation sports events.
- Events which attract a loyal following prepared to travel considerable distances for an opportunity to see their sport, most particularly multi-day events which increase overnight stays and food and drink requirements.
- Events which attract high numbers of officials, media and athletes that do not pay their own expenses, particularly if these are multi-day events.

10.3.1 Attracting new events to the East Midlands

This section stands apart from that on benefits from the Olympic and Paralympic Games, but in reality for at least the next seven years there will be considerable overlap between the two.

The key question we need to address is: How do we know which events will be most beneficial to the region?

In economic terms, events that support the greatest number of commercial bed-nights are the most beneficial. This may be from the duration of the event, or the potential to attract visitors for an extended period by combining the visit with other events or tourist attractions.

Furthermore, the greater the distance the visitors have travelled the greater the economic benefit – this is not only because they are likely to stay longer and add a further tourism time to their trip, but also because they are likely to spend more money on entertainment, other attractions and shopping, and are not always knowledgeable or concerned about how to live more cheaply. As a result they tend to stay in up-market hotel chains and eat out in city-centre restaurants rather than spend time and effort in finding the local low-cost, out-of-town supermarket. Events that attract the highest number of bed-nights are not necessarily the largest events. For example the Nottingham Open Tennis attracted over 19,000 visitors, but only 1,000 of them stayed overnight in commercial accommodation. The British Open Squash on the other hand attracted only 5,000 visitors, but 1,800 of them stayed overnight in paid accommodation.

A further consideration is whether the event is likely to produce spin-off benefits by way of increased tourism to the event. For example the economic benefit of the Tour of Britain is likely to come more from increased tourism to the region than from the event itself. Adventure sports events are also likely to come into this category with enthusiasts visiting the area year-round to train or participate at recognised facilities.

In social terms, events can benefit the region either by personal development or regeneration or social inclusion.

A process for evaluating the merits of potential events in terms of economic and social benefits should be developed to allow informed decisions about supporting potential (and existing) events. This needs in some way to quantify the potential benefits in order to be able to compare very different types and sizes of events. A newly developed Event Evaluation Tool to help this decision making process is given in Appendix 4.

For major mainstream sports events, it is often necessary to successfully host a series of junior, national and European Championships before being allowed to host world championships; as an example Dornay Lake staged junior events before hosting the 2006 World Rowing Championships. As a result, it must be accepted that the earlier stages on the path will not be so economically beneficial, but must be completed in order to gain the 'star prize'. The economic impact study on the synchronised ice skating is an example of such an event and demonstrates that even these events are economically beneficial to the region. The dilemma is that the costs are borne by the venue whilst the benefits are enjoyed by the wider locale – the hotels, restaurants and shops.

The issue of public sector financial support to the venues to allow wider benefits to accrue to the local area must be addressed. For UK Sport to become involved in helping the region to gain the event, two considerations are paramount:

- The drive for the event must come from the sport national governing body
- The event must be included in the sport governing body 10-year development strategy and be in line with the major competition cycle

Recommendations

- *emda* to evaluate the high spend and/or high growth sports for maximum economic benefit beyond the immediate event and for tourism spin-off benefits.
- Sport England to work with sports national governing bodies to understand and influence their 10-year strategies.

11. Sports Events Studied in the East Midlands

Summary

The Burghley Horse Trials, Silverstone Formula One Grand Prix and Donington Park Motorcycle Grand Prix have by far the highest economic impact of all events studied in the region. The Test Match Cricket and Tour of Britain attract similar spectator numbers but result in far smaller economic impact.

The studies have shown that the further visitors travel for the event, the higher the economic impact, particularly if the event is a multi-day event and visitors stay overnight in commercial accommodation.

Small events can have a greater relative impact than international events if the visitors are high spenders and the benefit of the event remains within the region. The synchronised skating and British Open Squash had a high economic impact relative to their size due to high rate of overnight stays, and high percentage of the organisational spend within the region.

As part of this overall study, the impact of four events were investigated in depth over 2004-5:

The 2004 Burghley Horse Trials	The 2004 Nottingham Open
The 2004 British Open Squash	The 2005 Nottingham Cup – Synchronised Skating

This section will describe the characteristics of each event and of the visitors to the event, and draw out the main economic and social benefits to the region. Finally, the main areas for economic development of the event will he highlighted. The main economic benefits are summarised in Table 2. All data is this table is directly comparable. In addition to the events we studied, a number of other events have previously been studied in the region. For these, an overview of the economic benefit is given in Table 3, but it is important to note that this data is not directly comparable since different scopes and methodologies were employed.

Previous studies in the East Midlands:

2003 Test Match Cricket

2003 Silverstone Formula One Motor Racing

2003 Days of Thunder motor racing series, Rockingham Circuit

2004 Tour of Britain Cycle Race – East Midlands stage

2004 Donington Park Motorcycle Grand Prix

Table 2: Economic Impact of Events Studied during this project[32]

	Burghley Horse Trials	Nottingham Open Tennis	British Open Squash	Nottingham Cup Synchronised Skating
Total Number of Visitor Days	140,000[33]	19,161[34]	5,159	1,719
% of Spectators from outside East Midlands	62	34	71	57
% of Spectators including overnight stay	34	10	44	45
% of visitors staying overnight in paid accommodation	23	6	35	36
Average spend in region (p.p.p.d.)	£ 264	£ 53	£ 80	£ 44
Additional Visitor Expenditure Generated by Event	£15.6 mn	£ 730,000	£ 367,000	£ 145,000
Total Economic Benefit to the East Midlands (including promoter's expenditure)	£20.4 mn	£1.4 mn	£ 725,000	£ 231,000
FTE jobs created/supported in EM	398	22	10	2

[32] The same methodology was used for all four studies. As a result the data are directly comparable.
[33] Figure includes all competitors, support teams, trade stand staff and complimentary tickets.
[34] Figure includes complimentary tickets, but excludes Festival of Tennis attendance.

Table 3: Economic benefit from previous events studied in the East Midlands[35]

	Silverstone F1 Grand Prix 2002[36]	Moto GP Donington Park[37]	Rockingham 'Days of Thunder'[38]	Tour of Britain 2004	Test Match Cricket Trent Bridge
Total Number of Spectators Days	122,000	129,000	21,687	88,750	73,000
% of Spectators from outside Region	78	76	46	23	51
% of Spectators including overnight stay	44	46	5	15	27
Number of Commercial Bed nights generated	75,000	N/a	1100	894	15,000
Average spend in region (p.p.p.d.)	£83	£40 - £99[39]	£38	£18 - £36[40]	£25
Additional Visitor Expenditure Generated by Event within the region	£15.6 mn	£9.9mn	£1.1mn	£ 116,000	£1.1mn
Total Economic Benefit to the Region (including promoter's expenditure)	£5.6mn	£10.5 mn	N/a	£157,000	N/a
FTE jobs created/supported	403	242	28	N/a	N/a

[35] A number of different consultants carried out these studies. The methodology and scope of the studies varies. As such the data should be regarded as indicative 'order of magnitude' rather than directly comparable.
[36] In this case the 'region' is defined as a 50 mile radius of Silverstone, thereby including almost equal parts of the East and West Midlands, East, South East and South West of England RDA regions.
[37] In this case the region is defined as a 25 mile radius of Donington.
[38] Data given are for one for the 8 race series held annually. The region is defined as a 50 mile radius of Rockingham thereby including part of East Midlands and East of England RDA regions, and very small part of West Midlands and South East England RDA region.
[39] Range given for day visitors and commercial overnight stayers.
[40] Figure includes all competitors, support teams, trade stand staff and complimentary tickets.

11.1 Key Economic Benefits

Summary

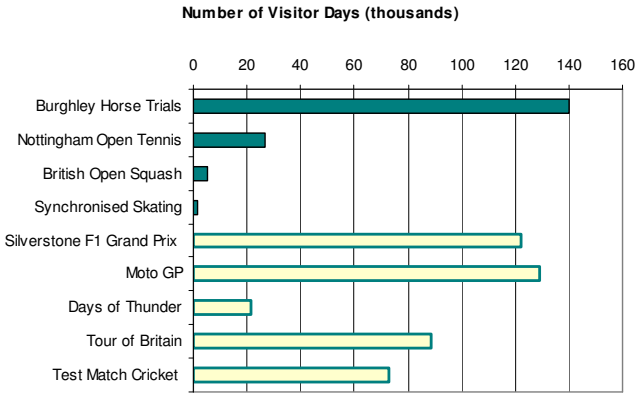
The nine events studied to date in the East Midlands:

- Attract nearly 500,000 visitors from outside the immediate locality.
- Result in an additional expenditure of over £ 44 million in the region.
- Support in excess of 1,000 FTE jobs.

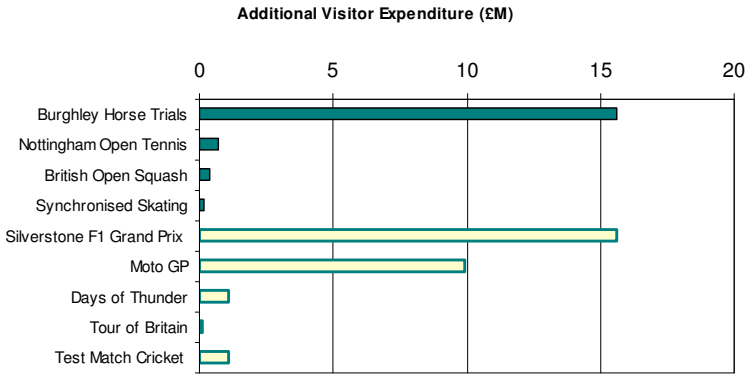
The key economic benefits from the events studied as part of this project and by other projects are show in the accompanying charts and in Tables 2 and 3. For the events we studied (shown in green in the charts and detailed in Table 2) the methodology allows direct comparison between events. The other events (shown in yellow on the charts and in Table 3) differed in their scope and methodology. Where data was not available in the report, we have estimated the figure using the available data. For these reasons this data is given as illustrative order of magnitude only and should not be considered as directly comparable.

An explanation of how the money that is spent by visitors and promoters is turned into economic impact figures is given in Figure 3. Money spent by local residents is considered in all studies to be 'deadweight' expenditure – i.e. expenditure that would have occurred within the region whether or not the event took place.

We can see from the accompanying graphs that in terms of visitor numbers, Burghley Horse Trials, the Formula One Grand Prix and MotoGP events are the largest events, with the Tour of Britain and Test Match cricket coming closely behind. The other events are considerably smaller.

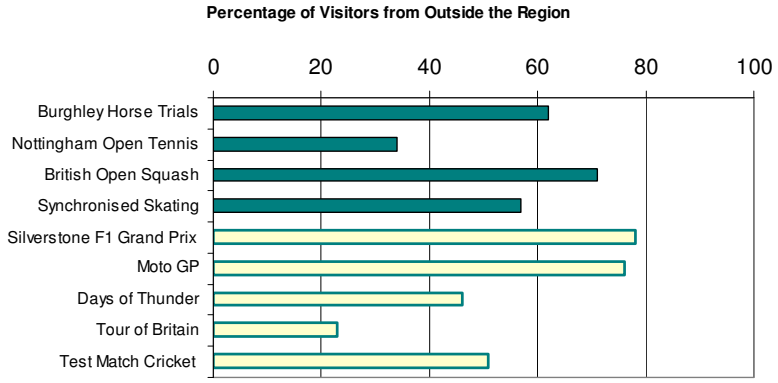


In terms of additional visitor expenditure, however, the three largest events dwarf all others in magnitude. To understand why some events have a lower economic impact per visitor we need to look at the spending patterns.

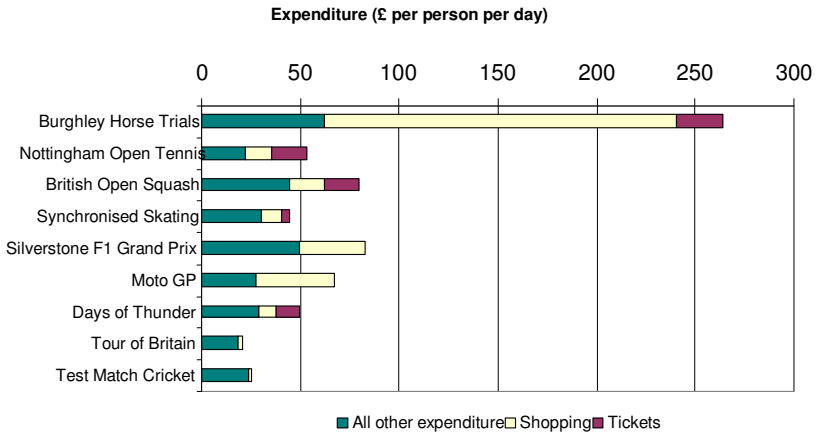


The impact studies have shown that the further visitors come for the event, the higher the economic impact, particularly if the event is a multi-day event and visitors stay overnight in commercial accommodation.

For the Tour of Britain, the lowest percentage of visitors came from outside the region of all the events studied. As a result very little money was spent on accommodation, food and drink and other shopping associated with the visit to the event.



Although half of the visitors to the Test Match cricket came from outside the region, only 27% stayed overnight and many of those stayed with friends and family rather than in commercial accommodation. The majority of their expenditure was on food and drink within Trent Bridge itself. The cost of tickets was not included in this study, thereby reducing the reported daily expenditure impact further. The breakdown of expenditure is shown in the graph below. For all events the cost of tickets (where available) and the cost of shopping associated with the event is shown separately. The 'other expenditure' is primarily composed of accommodation



and food and drink. The green and yellow areas in the graphs should therefore be directly comparable since not all impact studies reported ticket costs.

The yellow areas in the graphs – shopping – can also be deceptive. For many events, a proportion of the money spent on merchandising and other shopping at the event is spent with non-regional businesses and as such does not accrue to the region. Although in accounting terms this expenditure 'belongs' to the region having been spent here, the money directly leaves the local economy with the standholder. This is particularly true at Burghley Horse Trials where shopping is the most significant item of expenditure. Of course there will have been fees paid by the standholder or merchandiser to the venue, and some of the stands will be East Midlands based companies so not all of the expenditure will leave the region.

A good comparison of 'real' direct additional expenditure from visitors is therefore the green areas on the chart as this is money which is spent and mostly retained within the region.

It can be seen from the tables that, of the smaller events, the British Open Squash and the Nottingham Cup synchronised skating punch above their weight in terms of economic impact. The Nottingham Open Tennis and the 'Days of Thunder' at Rockingham had a lower impact than anticipated by the visitor numbers because of their high percentage of visitors from within the region. Additionally the 'Days of Thunder' is a one-day event, thereby reducing the potential for overnight visitors.

To convert direct expenditure to economic impact requires the use of 'multipliers' relevant to the local economy. These multipliers translate the direct expenditure into indirect expenditure and induced expenditure. The headline figure of additional direct expenditure therefore requires further analysis in the following ways:

- How much of this figure was spent on goods or services that actually originated in the local economies (i.e. within the East Midlands area) as opposed to those that originated elsewhere?
- How the *direct* expenditure resulted in further *indirect* spending (i.e. purchases from businesses in the supply chains to those receiving the *direct* expenditure)? This needs to be quantified.
- How the *direct* and *indirect* expenditures above result in wages being paid to individuals which are in turn spent in the economy? This *induced* expenditure needs to be quantified.

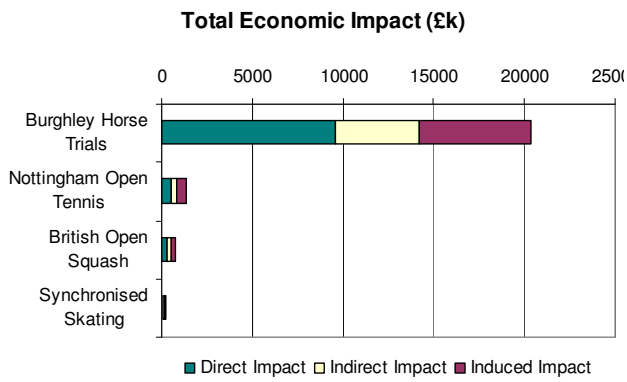
These further effects within the economy are termed 'multiplier' analyses: for an amount spent *directly* there are further *indirect* and *induced* expenditures which 'multiply' the original amount.

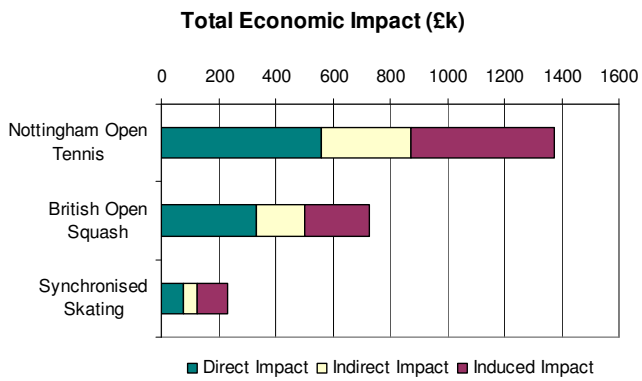
Many economic impact studies either do not use any multiplier analysis to calculate indirect or induced expenditure or use national, or 'borrowed' multipliers. UK Sport studies stop at measuring additional spending. UK Sport does not apply multipliers to estimate the wider impact on the local economy because 'this type of research is about comparing events and not economies'. UK Sport was not in a position to estimate multipliers, and states quite properly that '*borrowed* multiplier analysis can be considered only a poor approximation at best and any findings are most likely to be erroneous'[41].

However we do not stop there, because our research *is*, in part, about comparing economies. We *are* in a position to estimate appropriate multipliers rather than having to borrow inappropriate ones, and so can examine the legitimate economic interests of the East Midlands Development Agency.

Appendices 5 to 7 give a more detailed explanation of our methodology and Appendix 8 gives a glossary of economic terms used.

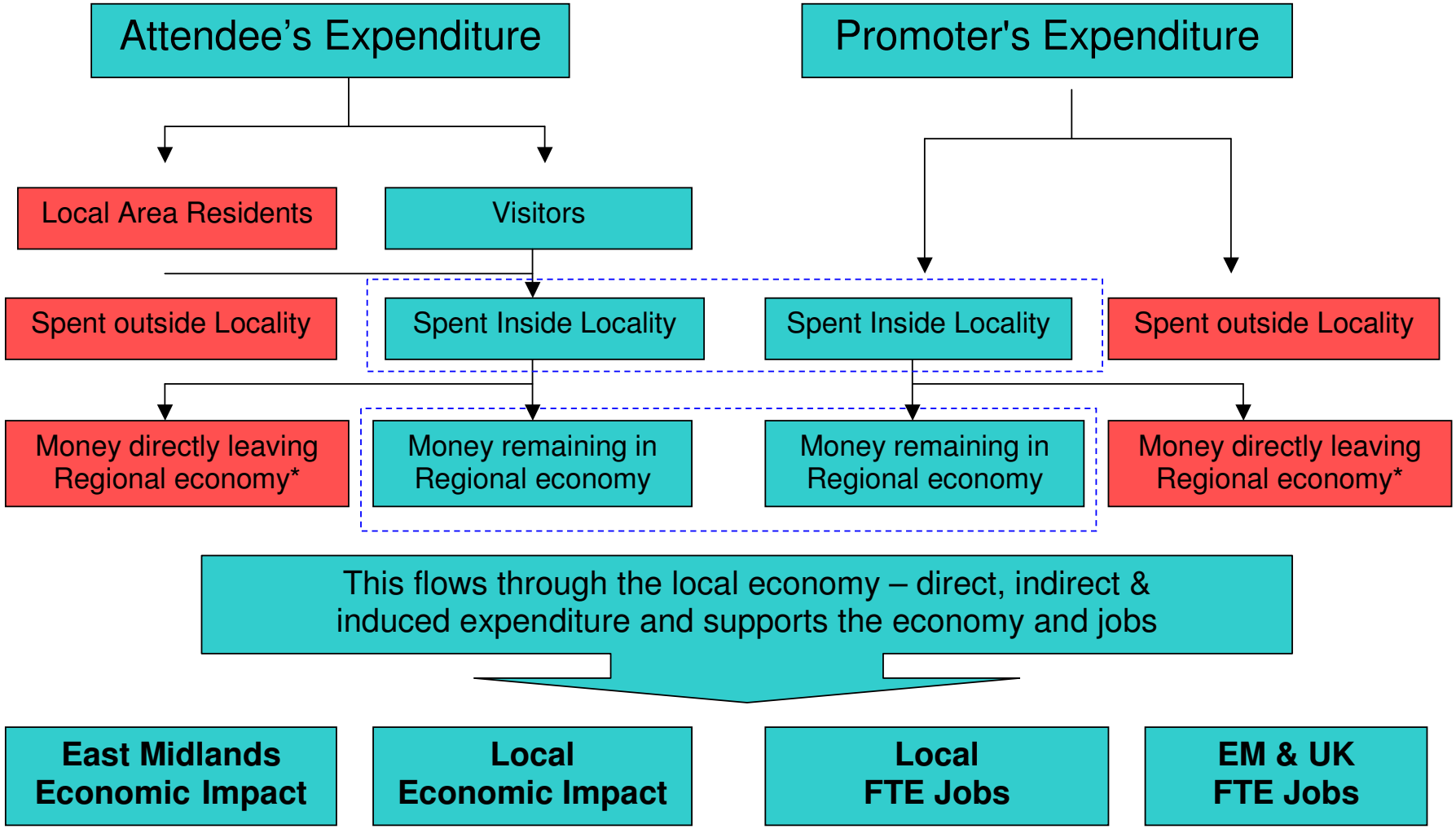
The following graphs show how the total economic impact is made up from the direct, indirect and induced expenditure. Since the Burghley Horse Trials dwarfs the other events, the graph is reproduced with and without the Burghley data. The relative contributions of indirect and induced expenditure reflect the proportion of the expenditure which is retained within the local economy through the supply chain and employment of staff.





[41] UK Sport; Measuring Success 2, Section 5 Methodology

Figure 3: Tracing the Economic Impact



* Includes for example ticket purchases, VAT, fuel duties, money spent at non-local businesses

11.2 The 2004 Burghley Horse Trials

The Burghley Horse Trials is one of the three top international 3-day events held worldwide. Held since 1961, it attracts the world's top riders and horses. Running alongside this premier event are a number of other equestrian competitions and a well-established trade area which attracts thousands of people to its varied stands. Described as "for the compulsive shopper, Burghley represents Nirvana", for many the trade stands are the real reason for coming to Burghley. For others the event is a date in the social calendar – time to spend with family and to meet old friends.

The event attracts up to 140,000 visitors, including spectators, competitors and owners, trade stand personnel and the media. In 2004, the Burghley Horse Trials gave rise to £15.6 million additional visitor expenditure and a further £700,000 was spent in the region by the organisers. The total expenditure effect[42], was £20.3 million, supporting 398 FTE jobs in the East Midlands and a further 151 in the rest of the UK. In terms of economic benefit this event is at the top end of UK events, on a par with Formula 1 Grand Prix or the London Marathon.[43]

At an average of £264 per person per day, this rates as the highest spend event studied either in the East Midlands or by UK Sport. It is, however, important to note that much of this is on shopping, mostly with firms based outside the region. Deducting this, the event is still at the highest end of the daily per person expenditure range, along with the Formula 1 Grand Prix at Silverstone. Nearly one quarter of all visitors stay overnight in commercial accommodation benefiting the wider community with 100% occupancy at premium rates throughout the event.

As well as the economic benefits, the event supports the development of the sport through the profits raised and through the young horse competition and pony club events at the event.

Potential for further economic development is limited by the event being well-developed and the capacity of the local area to support more visitors. The main areas of potential are:

- Increase expenditure and prolong the length of stay of visitors by additional attractions or co-ordination with existing attractions.
- Reduce the weather dependence by selling a wider range of tickets in advance.
- Increase the proportion of trade stands allocated to East Midlands based companies.
- Use the event to showcase regional industries – such as East Midlands Fine Food Forum and the clothing and textile industry.

[42] Taking into account indirect and induced expenditure
[43] UK Sport, Measuring Sport 2

11.3 The 2004 Nottingham Open

The Nottingham Open Tennis Championships are held in June each year between two Grand Slam events: the French Open, which is on clay courts, and Wimbledon, the only grass court Grand Slam tournament. The timing of the event means that Nottingham does not attract the serious contenders for the Wimbledon title, but it does attract many players just below the very top rankings who want to compete for the grass court practice, and for the opportunity to gain both ranking points and titles. These are still very well known and popular players such as Greg Rudeski. The particular strengths of the Nottingham Open are a relaxed and friendly atmosphere, with unrivalled proximity to play and players.

It is common in tennis that, apart from Grand Slams, spectators will not travel far to events. As a result the percentage of visitors from outside the region was the lowest of all the events studied, with the exception of the Tour of Britain. It also had the lowest percentage of visitors staying overnight in commercial accommodation, apart from the one-day Rockingham 'Days of Thunder'. As a consequence of the low spend on accommodation, and the lack of shopping opportunities at the event, the daily expenditure per person per day is low, at £53 including tickets, most of which is spent at the event itself. Despite this, in 2004 the event contributed £1.4 million to the local economy and supported 22 FTE jobs in the region.

The event is extremely popular with its nearly 20,000 visitors and contributes strongly to the sports development of the region with the 'Festival of Tennis' which runs tennis and sports development activities for 7,500 local schoolchildren during the tournament week. The event also raises the profile of the region through media coverage and contributes to the quality of life of the residents of Nottingham.

The main areas for economic development of the event are:

- Increase number of visitors from outside the region and overnights stays by promotion to key market areas of Manchester and Birmingham conurbations, particularly for midweek days. This may include additional attractions in the mornings.
- Package event with other attractions such as hotels or health spas.
- Use the entrance area to the event for additional trade stands for regional companies and to showcase regional industries.
- Supply chain audit to increase local companies supplying the event.

11.4 The 2004 British Open Squash

The British Open Squash was once the only major international event in the squash calendar. Whilst the tour timetable is now much fuller, the event remains one of the premier squash events and has the reputation of 'the Wimbledon of Squash'. In 2003 Nottingham was chosen for the venue since the Nottingham Squash Rackets Club is a centre of excellence and the club is very vibrant and was enthusiastic about staging the event.

Squash events worldwide struggle to be truly commercial ventures despite squash having high participation levels, estimated at 18-20 million players worldwide. There are inherent difficulties in making squash a mass spectator sport, with the confined space and small ball. Spectator numbers are limited and sponsors correspondingly hard to find.

For the fan, this also has its advantages: the elite players are far more accessible than for most sports, often sitting in the audience and mingling with the crowd in a way unthinkable at the highest levels in most sports. It is recognised that across the world, squash events attract dedicated fans who are prepared to travel to see their sport played at the highest level. Unlike other sports, squash tournaments do not attract the more general sports fan.

The British Open Squash attracted the highest percentage (71%) of visitors from outside the East Midlands of the four events we studied. Their daily spend was correspondingly high at £80 due to the high percentage of visitors (35%) that included an overnight stay in commercial accommodation. If shopping and tickets are excluded, the average daily expenditure per person at the squash (£45) was double that of the tennis and exceeded only by Burghley Horse trials (£62) and Silverstone Formula 1 Grand Prix (£50).

As a result of the high daily spend, the economic impact was more significant than would be expected for an event of only 5,000 visitor days. The total economic benefit was £725,000 including promoter's expenditure, and the event supported 10 FTE jobs in the East Midlands.

In conjunction with the tournament, a mini-squash exhibition is held the preceding weekend in Nottingham main square to attract young people into sport and there are junior exhibition matches at the Albert Hall in the main programme.

The British Open Squash relocated to Manchester in 2005 so no recommendations are proposed here for developing the economic impact.

11.5 The 2005 Nottingham Cup – Synchronised Skating

The Nottingham Cup is one of a series of skating events that is being staged at the National Ice Centre with the ambition of being awarded a major international championship event in the future. It is common in the world of sport to be required to host a progression of minor events prior to being awarded major championships. Often such events do not in themselves make any money - in fact many run at loss, taking into account the income and expenditure at the venue alone. It is therefore extremely important to understand whether the events result in a net positive economic impact for the locality in order to gain support from regional or local authorities for staging these events. Synchronised skating is a relatively new discipline to the UK market and as such has a limited following. It was anticipated that the Nottingham Cup would be primarily a participant event, with the spectators being composed of friends and family of the competitors rather than a more general public.

In common with the squash, the Nottingham Cup produced a surprisingly large economic impact for an event of the size. With fewer than 2,000 visitor days the event brought an additional visitor expenditure of £145,000 into the area and a total economic benefit of £230,000. This high figure is due to the overseas visitors – from US, Canada, Finland, France, Holland and Russia – visiting the city for up to 6 days. The accommodation expenditure was particularly important since it occurred out of peak time – during the week in early March – when hotels usually have unfilled rooms.

This is an extremely pertinent finding since it shows that even small events traditionally thought of as ‘loss-leaders’ on the path to large world events contribute to the local economy providing they attract visitors from afar and include overnight stays by reason of multi-day events. As part of a sport or venue development strategy, these events should therefore be supported financially to ensure that the venue itself is does not lose money and so be unable to follow the path through to a major championships.

12. Participation Sports Events

Summary

Mass participation events can have a greater economic impact than spectator events.

The East Midlands should review the potential benefits and requirements of sub-elite championships and target hosting one of these Games per year by 2010.

Participation events come in two categories: events which change location each time the event is held and regular fixtures. The international events which change location each time they are held can deliver a massive economic impact by virtue of a large number of international visitors, and their families, coming to the region for a multi-day event and potentially staying longer in the region by combining the visit with the main family holiday. Although these are individual 'one-off' events, providing there are sufficient numbers of them, then the East Midlands should target having one such event in the region every year.[44]

Whilst no economic impact study was carried out on the mass participation events which impacted on the region in 2004 it is nevertheless clear that the economic impact must have been highly significant with up to 15,000 extreme sports fans in Skegness for the weekend Windfest kitesurfing festival and 3-4,000 competitors in Nottingham for the International Cheerleading Championships. For the cheerleading championships, teams from America, Mexico, Thailand, India, Greece, Sweden and Denmark competed alongside those from England, Scotland, Wales, Northern Ireland and the Channel Islands all of whom will have required accommodation and food and drink, as well as spending money in the region on merchandising and retail goods. The World Firefighter's Games, held predominantly in Sheffield, had one day at Holme Pierrepont in Nottingham, and involved 4,000 firefighters from over 40 countries competing in events over 8 days.

In order to measure and to demonstrate the economic development of the sector, and to position the region as pre-eminent for sports tourism, it is important that the culture of measuring some events or sports tourism sectors each year becomes embedded in the development strategy.

Regular fixtures can also have a large impact providing they attract participants from outside the region, preferably run over more than one day (or have an early start time) and allow

[44] A list of such events needs to be developed along with past venues, planning timescales, and hosting requirements. See www.internationalgames.net/alphalist.htm for a complete list of games worldwide, including archive list of previous games.

competitors the opportunity to spend money. Events such as the Lowe Alpine marathon, run over a Saturday and Sunday, requires competitors to carry all their food and to camp overnight en route. As a result the economic impact of having large numbers of participants in the region is necessarily limited. Likewise regular events in the East Midlands such as the national rowing championships at Holme Pierrepont provide few opportunities for expenditure among the participants.

An example of a participation event which has a high economic impact is the Manchester United Premier Cup which annually brings junior football teams from all over the world to Manchester.

In the run-up to the 2012 Olympic and Paralympic Games, a boost in attendance in regional events, such as the Robin Hood marathon, should be anticipated as a result of runners using the event for acclimatisation and the general upsurge in interest in sports in this country.

Conclusions

To develop a strategy to attract, retain and deliver maximum benefit from participation events we need to look at:

- What is 'special' about the East Midlands – facilities, natural features (mountains, climbing crags, watercourses), and sports heritage that would attract participants from outside the region to participate in events in the region? If the events are replicated across the country, the event does need to be truly 'special' to attract participants to travel considerable distance when similar events are available close to home.
- What are the region's competencies? These are not limited to physical assets, but include expertise and specialist knowledge.
- What are the "high spend" sports which hold participation events? For example, golf, equestrian or motorsports rather than mountain marathons.
- Where are the growth areas that the East Midlands could develop a good reputation in – such as triathlon, mountain triathlon, extreme sports, watersports?
- What venues does the East Midlands have to host events?
- What is the process and timeframe for deciding on locations of events?

13. Case Studies: Sports Holidays and Breaks in the East Midlands

13.1 Introduction

The wide range of activities in the East Midlands represents a major opportunity to further develop tourism in the area of sports holidays. The links are already strong with walking, outdoor sports, cycling, golf and watersports well represented. Attractions in the region include:

- Golf Tourism
- Peak District National Park
- Sherwood Forest
- The National Forest
- Stoney Cove National Scuba Diving Centre
- Water sports: predominantly Rutland Water
- Cycling: mountain biking and cycle routes
- Leisure, fitness and beauty spas

In addition to these the wide range of sports facilities in the region used for elite sports could be opened to sports holidays and have the potential to generate significant tourist interest. The opportunity to train 'alongside' famous athletes is a huge draw for many amateur sportsmen and women. Not only are sports activities extremely popular, but many of them are high-spend activities. With all the attractions, the focus must start with an analysis of:

- What do visitors want?
- What does the region have to offer?
- How can we improve the attractions to better match what is wanted?
- How do we co-ordinate and promote the attractions?

In this section, we look at some of the reasons a sports tourist might visit the region, with a view to understanding the offering and how to develop and promote the tourism market. This is not a comprehensive assessment of every attraction. Instead it aims to give an overview of the breadth and depth of the offering in the region and the potential for future development by considering a number of case studies.

13.2 Golf Tourism

Summary

- Visitors to the East Midlands golf courses spend £14.4 million on green fees alone.
- This expenditure benefits the regional economy by £26 million and supports 445 FTE jobs in the East Midlands.
- There is significant potential to increase this benefit by attracting overseas visitors.

Golf is traditionally a high-spend sport, with participants willing to spend significant sums on playing good courses, on accommodation, food and drink and on golfing retail goods. Many golf tourists take at least one golf trip per year and the industry has proved to be recession proof and one of the few tourism sectors largely unaffected by global terrorism or health-related scares (such as SARS virus in 2003). Overseas golf tourists spend up to four times the average daily spend of other tourists. In addition the golf season extends well beyond the peak summer season for most tourism, with Spring and Autumn being particularly popular. Much golf tourism is unrelated to family holidays, being either adult groups (often single gender groups) or, increasingly, senior citizens.

The golf tourism market itself is changing. Golf is becoming increasing popular in Germany and Sweden, but both countries have limited capacity for participation (lack of courses in Germany; weather and hours of daylight in Sweden). The over 60's market is also growing as more people have the benefit of good health, relative affluence and the desire to actively enjoy their retirement. For many others, time poverty continues to be a barrier to regular participation in a sport like golf. To reflect this, development companies[45] are investing in short-courses, normally six-hole par 3 courses.

The East Midlands has a wide range of golf courses and resorts.[46] Many other hotels in the region advertise their proximity to golf courses that accept day visitors. As part of this project, the economic impact of golf tourism to the region was studied in depth. A separate report has been issued and we present the main findings of that report here.

Our study showed that visitors to the East Midlands golf courses spend an estimated £14.4 million on green fees alone. Due to the high proportion of this income being retained and spent within the region by the golf clubs, this benefits the regional economy by £26 million,

[45] Sunday Times, 31st July 2005.
[46] A selection of resorts offering accommodation and golf is contained in Appendix 10.

taking direct, indirect and induced expenditure into account[47]. A total of 445 FTE jobs within the region are supported by this income. Further economic benefit will be obtained by overnight visitors to the region spending money on accommodation, food and drink and other items. No data exists to quantify this, but an additional estimated £54,000 income per 1,000 visitor nights results from UK based golfers visiting the region. Overseas visitors would spend at a much higher rate, but we found no evidence of overseas visitors coming to the region in order to play golf. Most visitors in fact are day visitors, many of whom will come from within the East Midlands region itself. Without major championships such as the Open or Ryder Cup being held in the region, it is unlikely to attract US golf tourists who almost exclusively want to play the high profile courses when they travel overseas[48].

We believe that golf has significant potential to increase the economic benefit to the region through tourism. By way of comparison, Ireland has focussed on developing golf tourism since the late 1980's and now receives in excess of 240,000 overseas visitors per year bringing an estimated £100 million additional economic benefit. This is expected to grow further with the Ryder Cup being held in Ireland in 2006, with estimates of over 400,000 visitors. It has achieved this despite having neither the tradition (like Scotland) nor the weather (like Spain), but by strategic infrastructure development and proactive marketing.

If, on a regional or sub-regional basis, East Midlands Tourism and the DMPs decide to promote golf in the region, it is essential to understand the East Midlands offering and the potential market. From that, realistic development plans can be made. Our study highlighted a number of strengths and issues in the East Midlands region for golf tourism:

Strengths

- The region has one of the world's top 50 courses at Woodhall Spa in Lincolnshire, which is also the home of amateur golf in the UK (The English Golf Union and the National Golf Training Centre).
- Many courses have easy access from the motorway network.
- Many courses are in particularly attractive settings: in country house estates, in areas of outstanding natural beauty, within landscaped parkland.
- The region has a number of championship standard courses, three of which have recently hosted major tournaments.

[47] See Appendix 8 for explanation of terms
[48] More detailed analysis and recommendations are contained within the golf tourism economic impact report, published separately

- There is a wide range of golf courses available to the visitor – from four star, luxury resorts to family friendly multi-sport holiday centres.
- The region is the home of one of the professional circuit's top players – Lee Westwood and other courses can boast celebrity endorsements.
- Good access to growth markets for golf tourism: Germany and Sweden.

Issues

- The region currently attracts almost no overseas visitors as golf tourists.
- There is no development plan for the industry.
- The region does not host any major championships; this limits its attractiveness to the US market which overwhelming wants to play on the Open and Ryder Cup courses.
- Capacity: many clubs do not have the capacity to welcome an increased number of visitors. This is particularly the case in areas of high population density and easy access to the motorway system.
- There is no co-ordinated approach to the golf tourism market in the region. Promotion of the courses is done individually through golf channels with some sub-regional promotion through the DMPs.
- Transport and accommodation infrastructure is limited in rural areas and limits the potential of some courses to host visitors. This is true even for the region's most prestigious course at Woodhall Spa.

An overall strategy needs to be developed together with the industry itself, including the golf courses, clubs and resorts and the regional transport, accommodation and tourism providers. Clearly for Sport England and *emda* to support any initiatives, clear economic, social and sport development benefits would need to be demonstrated.

Key Opportunities

Good access to the growing German and Swedish golf market and an excellent range of courses to attract this market as well as attracting more UK visitors.

The ability to market its strengths to the corporate market, especially in conjunction with other events in the region such as test match cricket at Trent Bridge, motorsports or conferences.

Overall, the region has a number of significant attractors to the golf tourism market, but is currently not accessing the high value end – the overseas golf tourist. To address this a co-ordinated approach is required to highlight development actions and priorities.

13.3 Peak District National Park

Summary

- The Peak District is the most visited National Park in the UK with over 22 million visitors per year. Most visitors (75%) live close by the Park District.
- Total visitor expenditure is in excess of £991 million per year.
- A high percentage of trips (35%) include overnight stays.
- Most visitors participate in sporting activity – for many it is the reason for their visit.
- There remains the opportunity to bring higher value to the Park by attracting more visitors for during the winter and by increased added value activities.
- Easier access to booking accommodation with activities will attract the 'last minute' market and people with limited time to organise short breaks.

13.3.1 Overview

The Peak District National Park covers an area of 555 square miles and incorporates parts of the counties of Derbyshire, Staffordshire and Cheshire. It became the first National Park in Britain in 1951 and comprises moorlands, farmlands and dales across its area. The Peak District boasts a diverse range of activities for visitors and has a particular emphasis on walking and adventurous activities. Statistics show that it is the most visited national park in the UK with over 22 million visitors per year[49]. A visitor survey is currently being undertaken by the Peak District National Park to update the data available from the 1998 study. Surprisingly, 75% of those visitors staying overnight in the Park come from the counties in or neighbouring the Park, with only 22% visiting from other counties of the UK and 3% from overseas.

Economic Impact: Total Visitor Expenditure (1998)

Day Trippers	£104 million
Overnight Visitors	£887 million

The 1998 Visitor Survey identified that 35% of all trips included overnights stays with an average duration of 4.8 nights. This is a very high percentage of overnight stays compared with other locations, for example only 7% of visitors to the National Forest stayed overnight. Overnight visitors spend more than 2.8 times the amount per day that day-trippers spent (£21-26 per day compared to £7.30 per day for day-trippers in 1998).

[49] "Demand for Outdoor Recreation in the English National Parks"; a report for the Countryside Agency by Lynn Crowe & Craig Mulder, The Centre for Environmental Conservation and Outdoor Leisure, Sheffield Hallam University. October 2004

Most visitors to the Peak Park participate in some sporting activity during their stay and many visit the Park in order to participate in that activity. These are the true 'sports tourists' and as such a large proportion of the Peak Park's visitor expenditure is directly attributable to sports tourism. A summary of the two principal requirements for sports holidays in the Peak District – the activities and suitable accommodation – follows.

13.3.2 Sporting Activities

The Peak District National Park promotes a wide range of activities through its website. Some of these are organised and managed sports whilst for others the environment and landscape of the Peak District are all that is required.

The 2004 report into the Demand for Outdoor Recreation in the English National Parks[50] produced a table highlighting the activity participation in the Peak District National Parks using data from the All Parks Visitor Survey in 1994. It should be noted that hiking / rambling and fell walking was excluded from the report so this data is not presented. From the survey, the most frequent activities in the Park were:

- Cycling and mountain biking: 8% of all visitors. Local surveys indicate up to 30% of visitors in key areas are cyclists. The National Park Authority's own centres report approx 40,000 bicycle hirings per annum.
- Caving: 3% of all visitors. The National Park Authority, in partnership with the Caving Club , facilitated caving at Ashford Marble Mine.
- Horse riding / Pony trekking: 2% of all visitors. The lack of circular routes was reported to be a limiting issue.
- Boat trip / cruise: 2% of all visitors.
- Climbing: 1% of all visitors. Despite the relatively low overall participation rate, climbing is highly significant in the Peak District and is a growing sport in the UK. At some prime sites, local surveys indicate that climbers account for up to 82% of visitors. Bouldering is reported to be increasing. National Park officers indicated that there is possibly an unmet demand for abseiling from local activity centres.
- Angling: 1% of all visitors.
- Other activities reported included: motorsports, hunting / following the hunt, sailing, day boat hire, waterskiing, canoeing / rowing.
- Participation rates in field sports were not reported, but National Park officers indicated that grouse shooting is extremely significant, particularly in the Dark Peak area.

[50] "Demand for Outdoor Recreation in the English National Parks"; a report for the Countryside Agency by Lynn Crowe & Craig Mulder, The Centre for Environmental Conservation and Outdoor Leisure, Sheffield Hallam University. October 2004

With such a variety of sports available and the high demand from visitors, the Peak District presents a major tourism opportunity for short breaks or longer holidays focusing on these and other sporting activities.

The nature of many of the businesses is such that much of the employment is seasonal so numbers employed will fluctuate throughout the year. However, if the Peak District can attract year-round visitors this will have a significant economic impact both in terms of employment and turnover.

13.3.3 Accommodation options in the Park and locality

Accommodation with the Peak District National Park covers a wide range of options from camping barns to hotels. However there appear to be few direct links between the accommodation providers and specific sporting activities.

The majority of short breaks are organised independently rather than as part of a package so there has been little to drive the accommodation providers to link with sports providers or associate themselves with a particular activity. This is also partly a result of many of the activities taking place without any formal organisation – holidaymakers generally hike or cycle without guidance. Easier access to a 'package' of accommodation with the organised activities available would attract the 'last minute' market and people for whom the time and effort it can take to organise a short break acts as a barrier.

13.3.4 How can the Peak District further develop as a sports tourism destination?

The 1998 survey also showed that 60% of people surveyed visited the Peak District between May and September, with Sundays being busiest. 80% are returning visitors and many are regular visitors. Not surprisingly, walking and outdoor activities were the most common reason given for visiting the Park (51% of respondents). There is therefore significant opportunity for improving the year round visitor numbers. This fact is acknowledged in the Peak District Sustainable Tourism Strategy, developed in 2000, which set out a number of aims for sustainable tourism including:

- increasing visitor spend
- encouraging longer stays and visits throughout the year
- attracting new visitors
- reducing dependency on the car
- conserving the landscape
- enhancing visitor enjoyment

It is outwith the scope of this study to undertake a detailed strategy for development, but an outline of requirements to be addressed in a full strategy is presented below.

Understand the Offering: What is special about the Peak District to sports tourists?

- A variety of sports and activities combined with proximity to other attractions in the area to suit all family members.
- Peace and quiet and getting away from it all in surroundings of natural beauty.
- Within easy access of large populations.
- It is accessible all year round.

What do people want from a short activity break?

- A comfortable, convenient place to stay that caters for their needs (not necessarily four star accommodation).
    - It may be possible to learn from the marketing approach used by Center Parcs which focuses on breaks as much as activities.
- Straightforward access to the activity of preference.

What would encourage them to visit during the winter?

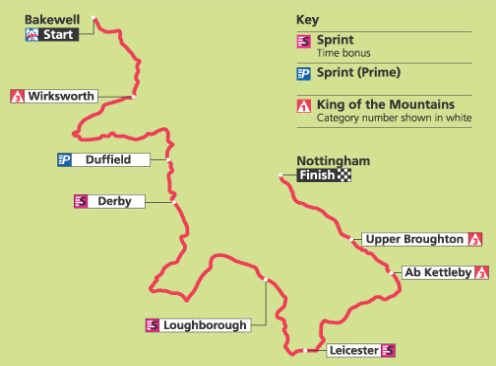
- Combining activities with comfortable accommodation to make the break more appealing (e.g. promote open log fires to beat the cold).
- Christmas and Easter trails for children.
- The Lake District promotes winter survival and safety courses in the colder months. Although the landscape is different, there is an opportunity for similar orienteering, safety and environmental awareness courses during the winter in the Peak District.

Understand the Distribution Channels

- How do people find out about the Peak District? How do tourists, particularly the high value, overseas tourists access information and make bookings?
- Many short breaks are organised independently with no involvement of tour operators or travel agents. Therefore, information has to be directly accessible by the customer.
- Combining organised sporting activities with accommodation provision in a package is attractive to the last minute and short break market.
- The role of ICT and the internet is critical for the short break market. The new official website for the Peak District is very informative. The ICT strategy needs ongoing investment and continuous improvement to make access to information easier and less time consuming.

Promote the region's strengths

- Raise awareness of the breadth of sporting activities in the Peak District through sporting events and tournaments.
- In 2004 two stages of the Tour of Britain passed through the Peak District – shown in the maps below. The region should capitalise on events such as the Tour to attract sports tourists to challenge themselves on the same route – on organised 'race' days and/or informal self-timing on marked stages. France attracts many cycle tourists to follow part of the route of the Tour de France (see section 13.5 for further details).



- Identify and focus on what the area has to offer compared to other major UK destinations for sport and activity breaks such as the Lake District and Scotland.
- Identify target market sectors for high value tourism and develop a strategy to promote the region to this sector.
- First Peak District Walking Festival (16 April – 2 May 2005) was successful in attracting new visitors to the region early in the season.

Conclusions

The opportunities for the Peak District to increase the economic impact of tourism come predominantly from:

- Increasing number of visitors during Winter and Spring (October – May).
- Increasing the average length of stay.
- Increasing the daily expenditure of visitors.

Since most visitors participate in sport whilst visiting the Peak District and many come in order to take part in sport, it must form the core of the strategy to achieve the objectives.

- Develop a wider range of organised events, training courses and activities during the winter and spring seasons.
- Use events such as Tour of Britain to develop participation cycling events and to promote the areas for cycling holidays / short breaks.
- Improve ICT to make booking of short breaks quicker and easier.
- Ensure the whole industry understands and is aligned with the needs of the visitors and the strengths are effectively promoted.

13.4 The National Forest

Summary

The National Forest is still a relatively new concept and although awareness and visitor numbers are growing year on year, it is not widely recognised outside the immediate vicinity as a destination for activity short breaks. There is enormous potential for increased sports and activity tourism if the natural assets are developed. The success of Center Parcs in the region should be studied as a marketing model.

13.4.1 Overview

The National Forest covers 200 square miles across three counties in the Midlands – Leicestershire, Derbyshire & Staffordshire – and as such parts fall under the West Midlands regional development agency as well as *emda*. The forest is described and promoted as '*a forest in the making*' as the first trees were only planted in 1990. Outside the immediate vicinity the National Forest, what it is and what it is about, is still relatively unknown.

The main focus of the National Forest is environmental and sustainable development, and a 10 year development plan is in place[51]. The National Forest is recognised as a potential major resource for tourism, recreation and education and has a tourism strategy to ensure that the area is developed in keeping with its overall aims and priorities[52]. Progress against objectives is regularly audited. Part of the attraction of the forest is sporting activity: walking, cycling, angling or taking part in one of the many commercial sports and exercise activities available.

13.4.2 Economic Impact

There were 6.1 million visitors to the National Forest in 2002, 7% of which included overnight stays. This is an increase on 2001 figures, which identified only 4% of visitors as staying overnight[53].

In terms of expenditure there are encouraging figures, with significant increases on previous years.[58] Of the total visitor spend of £199 million, £36 million could reasonably be allocated to sports related expenditure taking into account the percentage of visitors whose main aim was walking (12%) or outdoor activities (6%). How much of this is tourist related, as opposed to from local residents, is not quantified.

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[51] National Forest Development Plan 2004 - 2014
[52] National Forest Tourism Strategy 2004 - 2009
[53] Heart of England Tourist Board visitor survey 2001

	1999	2002[54]
Total Visitor Spend	£128 mn	£199 mn
Overnight Visitors Spend	£28 mn	£58 mn
Day Visitors Spend	£100 mn	£141 mn

The National Forest has created and supported 140 direct jobs and a further 80 indirect jobs over the period 1995 – 2003. These jobs are in a wide range of occupations, including forestry, conservation and tourism.

13.4.3 Sporting activities

The National Forest is an area of environmental interest and the range of sporting activities available and promoted within the Forest generally fall into the 'soft sports' category, such as angling, cycling, swimming and walking. The Forest also offers dry slope skiing and a toboggan run. There is considerable scope for further product and service development in order for the National Forest to become a major tourism centre for the UK, well beyond its current market which comprises mainly local residents and people visiting friends and relatives. With such considerable leisure and water-based recreation opportunities available in the Forest area, development of tourism in keeping with the core ethos is achievable. The forest must develop its assets to broaden the appeal to specific market sectors.

13.4.4 Accommodation in the National Forest

The National Forest Company recognises the importance of having quality accommodation in the Forest. Approved sites are given permission to use the National Forest logo and the company is working in partnerships to expand the accommodation choice. Clearly development of new facilities has to dovetail with the growth in popularity of the Forest as a tourism destination.

The National Forest website encourages potential visitors to consider overnight stays and longer stays by promoting accommodation on the activities pages and highlighting sports and activities on the accommodation pages. This has clearly been successful with an increase in holiday bed nights from 323,000 in 1999 to 746,600 in 2002.

[54] It should be noted that changes to data collection techniques at a national level mean direct comparisons should be treated with caution. Adjusted figures for 2002 still indicate 5 million visitors and total expenditure of £164 million. This would equate to some £47.6 million being spent by overnight visitors – nearly £20 million more than 1999.

13.4.5 How can the National Forest develop as a sports holiday destination?

The National Forest is a large area, focused on environmental and sustainable development, within which sporting activities take place. Sports and activity holidays are only one part of a bigger picture; developing the area for the sports holiday market must be sensitive to this wider priority. There is, however, a significant opportunity and economic benefit to be gained by increasing overnight visitor numbers through sports and activity breaks.

Understand the offering: what is special about The National Forest for sports tourists?

- The National Forest is unique in the fact that it is a 'Forest in the Making'. A constantly changing and developing landscape provides interest and new reasons for visiting.
- The Forest is close to large populations and is accessible all year round.
- The National Forest has a large number of water courses – canals, lakes and reservoirs. These offer significant potential to be further developed for sports without jeopardising the environmental ethos of the forest.

Understand the target markets

- The National Forest tourism strategy highlights three target markets – Empty Nesters, Family Groups and Schools and Group Travel.
- For the current target markets an emphasis on 'active' rather than 'sports' holidays is likely to be more effective in promoting the National Forest as a destination.
- Sports tourism is increasing across all demographic groups, but is still more associated with younger men. This group are only likely to fall into the 'group travel' category of the current target markets. By broadening the sports tourism offering, a larger market will be available.

Understand the distribution channels: raising awareness is key to continued growth

- The Ramblers Association actively promotes the National Forest on its website. Developing strong links with more organisations of this type, and with providers of walking and cycling holidays, will raise the profile of the Forest.
- Use travel media to promote the destination. For example railway operators frequently publicise attractions in the areas they service.
- People taking active or sports holidays/breaks usually make their own travel arrangements.[55] Easy access to high quality information is therefore critical. The National Forest website promotes accommodation and activities to encourage visitors to stay in the area for longer. The recent audit identified the success of the website and promotional literature in raising awareness.

[55] Activity Holidays Market Assessment, Jan 2001

Develop and Promote the region's strengths

- The statement 'A forest in the making' has captured the imagination and can be used to encourage greater involvement, for example by combining sports breaks with working and/or environmental holidays.
- Develop the resources of the National Forest for sport and recreational use, for example for watersports and water based activities.
- Identify and target sports events to take place within The National Forest in order to generate media and spectator interest and raise the profile and associate the Forest with sporting activity.

13.5 Cycling Holidays

Summary

The Tour of Britain provides a focus for the East Midlands to promote itself as a cycling and mountain biking destination. The challenge is to capitalise on the event and the attendant media attention to attract enthusiasts to the region.

With the re-instatement of the Tour of Britain in 2004, the opportunity exists to market the East Midlands as a cycling destination to a wider market. The route goes through the Peak District as well as the gentler Midlands countryside allowing both mountain biking and cycle touring to be promoted. With easy access to the East Midlands through East Midlands Airport and North Sea Ferries, Holland, Belgium and France are the natural overseas target markets for cycling holidays. The Tour of Britain can also be used as a vehicle to re-invigorate the existing cycle paths and to launch the new cycle path developments in the region.

The true economic benefit of the Tour of Britain is more likely to be achieved by increasing tourism to the region rather than from the event itself. There is significant media coverage of the region as part of the Tour which must be translated into increased visitor numbers.

The Tour de France annually has an amateur, participation event aligned with the professional Tour. This 'étape' (stage) has 8,500 participants undertaking one of the stages of the Tour a few days before the professionals. The available entries are sold out within 2 days, and it is estimated that 25,000 people would enter if there was no limit on the numbers. Of the étape, British entrants account for nearly 2,000 places, 80% of all foreign entries[56]. In common with most forms of sports tourism, daily expenditure is high. Entrance fees alone are currently £100, totalling nearly £1miilion income, but many overseas visitors book all-inclusive tours from specialist travel organisers for a minimum of 3 days costing from £475 to £850[57]. Sweetspot, the organisers of the Tour of Britain are considering organising such an event in future years. In addition to the étape, many cyclists travel to France on organised cycling holidays along part of the route of the Tour de France, such as through the Alps.

The East Midlands section of the Tour of Britain will almost always occur on a Friday. This gives the region the unique opportunity of attracting people to spectate on Friday then take part in an organised event on Saturday to see how they match up over time trials and the

[56] Observer Sport Monthly June 2005
[57] All British riders must enter via an appointed tour operator – see www.sportingtours.co.uk

stage against the professionals. This would encourage overnight stays in the region as well as day trips. An additional event on the Sunday would encourage further overnight stays.

A range of events using part of or the entire Tour route could take place throughout the year, and semi-permanent stage markers would allow visitors to time themselves. Similar recognised routes in other sports have websites where participants can enter their times informally in a 'virtual competition'.

Sweetspot, the organisers of the Tour of Britain, have a trade stand at the Cycle Show at ExCel in October. Whilst the show is attended primarily by enthusiasts looking at the latest equipment developments, this represents a low cost opportunity to promote the East Midlands as a cycling destination. This should form part of the requirements for future financial support of the Tour of Britain.

13.6 Stoney Cove Diving Centre

Summary

Stoney Cove, the inland dive site in Leicestershire, has developed over the last 25 years and remains the premier dive training site in the UK with over 60,000 visitors per year. It is extensively used for diving instruction by clubs and dive schools from all over the UK, predominantly from the South East of England. The dive centre and associated activity in the area contributes in excess of £3 million per annum to the local economy. It is a showcase example of what can be achieved in the area of sports tourism.

The privately owned diving centre at Stoney Cove in Leicestershire (often called the National Diving Centre) is already a significant attraction and continues to invest in facilities. Current investment is aimed at providing a year-round attraction and on-site accommodation as well us upgrading current facilities. The centre opened in the late 1970's and has come under increased competition over the last few years with sites in Cambridgeshire, Lancashire and Gloucestershire being developed, but it remains the premier site in the UK for diver training, with a range of depths for divers of all abilities. 60,000 visitors use the centre annually, with London, Essex and Kent being the main markets outside the immediate locality. Most visitors come from within a 3-hour drive time of Stoney Cove.

As well as the dive facility, the overall business includes a dive school, wetsuit manufacture and the testing and servicing of diving equipment. In total the business employs over 100 staff, both full and part-time. The influx of visitors also helps to support a range of local

businesses: there are 7 hotels, 14 bed and breakfast establishments and 5 campsites in the locality which is not otherwise rich in tourist attractions. Local pubs, restaurants and shops benefit from the increased visitor trade with up to 400 divers per day visiting during the peak Easter season. The centre, associated businesses and wider visitor expenditure in the local area contribute in excess of £3 million per year to the local economy.

The centre has improved significantly over the years with investment which has increased the attractiveness of the site and improved underwater visibility. The new developments will add an indoor pool for year-round diver training and a much improved retail area. There are also plans to provide on-site accommodation – whether this will increase tourist income to the region or merely re-distribute it from local accommodation providers remains to be seen. This is very much a success story of sports tourism creating and supporting jobs in the local community: in the Centre itself, and the wider tourism, service and construction industries.

13.7 Center Parcs

Summary

As well as the Sherwood Forest Holiday Village, Center Parcs is headquartered and has its main UK call centre in Nottinghamshire. As far back as 1991, the village alone benefited the local area by £14 million per year. Center Parcs market their holidays as family-oriented activity breaks, with a wide range of sporting activities on offer.

The Center Parcs holiday concept originated in the Netherlands, and the company is now the UK market leader in short breaks, combining accommodation with sporting activities for all ages and interests. The first UK site was opened in 1987 in Sherwood Forest and the company is headquartered at the Sherwood Energy Village near Newark. The attractions of the villages include 69 leisure activities such as a swimming complex for swimming and scuba diving; 400 acres of woodlands with car-free roads for walking and cycling; lakes for sailing and angling; golf range; tennis courts; challenge course; ten-pin bowling and health spas.

The UK company has four sites, with a fifth planned in Bedford, giving a total of just under 3,300 accommodation units housing 1.3 million visitors annually. In 2005, the company employed over 6,000 staff, with a turnover of £230 million and profit of £26 million. Occupancy rates of the villas were 92.4%. All bookings are handled directly by Center Parcs, predominantly through their call centre in Newark. The company continue to invest in the Sherwood Forest site, with £18 million invested in 2003 in the Spa facilities and additional accommodation, creating a further 70 jobs.

In 1991, the Sherwood Forest and Elvedon Forest sites (the 'villages') were the subject of an economic impact report produced by the Rural Development Commission, which made the following conclusions:

- Over £4 million per annum is injected into the local economy of the villages through wages and salaries paid to Center Parcs employees - this in turn supports another 38 jobs locally.
- £2 million is spent annually on goods and services supplied by local companies, with another £2 million spent with local depots of national companies based in the area. This activity supports another 148 jobs in local businesses.
- Center Parcs' guests spend £2 million each year in the locality, supporting another 65 jobs.
- Including the above and taking into account the multiplier effect of the additional jobs created through increased activity, the total income per annum for the local area of each village is £14 million (1991 figures).

13.8 Equestrian Sports

Summary

Equestrian sports are a major contributor to the rural economy of the region and the opportunity exists for further economic benefit to be derived through tourism and through Olympic training and holding camps. International equestrian competitions already benefit the region considerably. The economic impact of the Burghley Horse Trials alone is worth over £20 million to the East Midlands and this, along with other competitions, brings tens of thousands of visitors to the region each year.

Equestrianism is a much overlooked part of the sports economy. This study has not conducted any primary research in the area of tourism and equestrianism outside the impact study on the Burghley Horse Trials. However, the advent of the 2012 Olympic Games in London represents an opportunity for the region and an overview of the strengths is outlined here. Most of the information in this section has been supplied by Loughborough University[58] and LeicesterShire Promotions[59].

[58] "The character of East Midlands Equestrianism in the 21st Century", Loughborough University, July 2004

[59] "Equestrian Tourism Opportunities within Leicester and Rutland", Leicester Shire Promotions, December 2004

Apart from the research carried out as part of this project which determined that the Burghley Horse Trials benefits the East Midlands economy by over £20 million, no reliable economic data on the tourism element of equestrianism in the region exists. However, an order of magnitude figure of £250 million per year for all equestrian related activities in the East Midlands has been suggested,[60] with a portion of that being due to tourism related activity. Horse riding is a significant niche market for tourism with a reported 651,000 overnight holidaymakers in the UK taking part in horse riding whilst on holiday.[61] A recent report by the Henley Centre[62] concluded that "the horse industry has a significant opportunity to tap into the short break market by providing riding package weekends." Two current campaigns being run by Visit Britain will help promote equine tourism: Outdoor Britain and Sport Tourism.

The East Midlands annually holds 69 equestrian events of international, national or regional significance (not including horse racing), over half of which take place in Lincolnshire. Two events are of international significance: Burghley Horse Trials, Lincolnshire and Chatsworth House, Derbyshire which are Grand Prix and Olympic qualifying events respectively. These two events alone have a combined attendance of over 200,000 visitors per year, the majority of whom come from outside the East Midlands.[63]

The East Midlands has the opportunity to benefit from the Olympic Games in a number of ways, not least by hosting equestrian teams prior to and during the Games themselves. The relatively easy access to London by road for the horses is a major factor, as is the availability of excellent training facilities at Stamford and, potentially, in Loughborough.

Equestrianism also fits into the wider East Midlands economy within the higher education and further education sectors, including research groups at Loughborough University. Furthermore over 1,300 farms within the region have diversified into equine-related businesses with some offering accommodation for visitors and horses alike. This is seen as a vital requirement to sustain their overall business at a time of declining farm revenues from traditional activities.

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[60] "The character of East Midlands Equestrianism in the 21st Century", Loughborough University, July 2004
[61] 1999 UK Tourism survey
[62] "A report of research on the horse industry in Great Britain"; The Henley Centre, May 2004
[63] 2004 survey showed 67% of visitors to Burghley Horse Trials came form outside the East Midlands region

13.9 Water Sports

Summary

Little data is available detailing the economic impact of watersports in the region. It is, however, widely acknowledged that water sports are a major tourist attractor at key locations such as Rutland Water. The potential for further development of other sites in the region would need to be assessed. The increasing popularity of triathlon and mountain triathlon competitions should be incorporated into watercourse development plans.

Water sports are a major attraction in the East Midlands, most particularly at Rutland Water. Sports here include sailing, windsurfing and angling, as well as cycling and walking around the lake. The lake also holds the annual British Birdwatching fair attracting over 16,000 visitors over three days generating in the region of £350,000 to the local economy.[64]

Anglian Water estimate that over 1.5 million visits are made to their reservoirs each year, with Brixworth Country Park in Northamptonshire receiving over 400,000 visits. There has been considerable investment in the sports facilities across the region over the last few years with a new £450,000 million watersports centre at Covenham reservoir in Lincolnshire and a £1.5 million upgrade to Rutland sailing club.

Both reservoirs include expert tuition in a range of water sports, including access for people with disabilities, and host competitions. Recently a well-attended triathlon competition was held at Rutland Water showing that there is considerable sports development potential at these sites. Triathlon is one of the UK's fastest growing participation sports.

Rutland Water is in an area of considerable tourism activity – the local accommodation providers report that a high percentage of visitors come in order to sail on Rutland Water. This, combined with the attractive countryside and villages is a major attractor for the area. Whilst Lincolnshire is generally less visited by tourists, Covenham reservoir falls within the Lincolnshire Wolds, an area of outstanding natural beauty (AONB), and as such the tourism potential should be exploited to the full. The success and celebrity status of Ellen McArthur from Derbyshire should be used to promote sailing in the region.

[64] 2003 data from British Birdwatching Fair

13.10 Youth, Adult and Family Sports Camps

Summary

The concentration of sports facilities and specialist knowledge in the East Midlands lends itself to the developing sports camp market. The most economically beneficial segment of the market is that of the so-called adult 'fantasy' camps: where sports tourists train alongside sports stars, with the coach of a popular team or athlete, and/or at a famous sporting venue.

The ability to offer many aspects of sports performance - coaching, nutrition, physiotherapy, psychology - is an attractive package for the more serious sports clubs as well as for sports governing body development programmes. Feasibility studies would be required to assess the capacity and market demand.

The summer holiday youth sports camp is a growing market segment in the UK. The East Midlands is represented in this sector and new developments are being built to accommodate market growth.

The sports camp market is undoubtedly strongest in the United States, but is increasingly developing here, particularly as a summer holiday camp for school age children. These can be single sport development camps or, more usually, multi-activity camps. In the US there are over 8,500 camps attracting over 6 million participants per year and employing over 500,000 adults for the summer camps alone. Whilst youth sports camps are the most established sector of the market in the US, the number of family and adult camps is increasing.

In the East Midlands, examples of sports camps include commercial youth activity holiday camps run by Kids Klub at Worksop College; PGL at Caythorpe Court, Lincolnshire (opens 2006); and by ATE at Hagg Farm, Derbyshire and St Hughes, Lincolnshire. The Youth Hostel Association also run "Do it 4 Real" camps at a number of locations in the Peak District; Sport England organise talent camps at Loughborough University and children's "champs sports camps" are run in Nottingham and Leicester.

Particularly successful in the US adult sports camp market are the 'fantasy' sports camps, where adults train alongside sports stars, with the coach of a popular team or athlete, and/or at a famous sports location. In the US these are particularly high economic impact activities,

with a weekend course often costing over $2,000 and a week-long course in the region of $4,000.[65]

The East Midlands excels in terms of quality of venues, facilities and recognised experts in most fields of sport and sport science. With a number of long-standing world class events in the region, many of the venues and attractions have well-recognised sport heritage as an added attraction. A feasibility study into introducing 'tourism' sports courses at facilities currently dedicated to elite sports and community use needs to be undertaken to determine whether there is the capacity and sustainable market to make this a viable opportunity.

The newly built watercourse at Eton College's Dornay Lake is an excellent example of what can be achieved when all the elements for coaching, nutrition and sports medicine are collected under one roof. The centre has in a short space of time become nearly fully booked for weekend courses in rowing and sport training, targeting the school and club market. Its relative accessibility, and the status of being chosen to host major rowing championships, have helped to gain a reputation as the place to be for rowing. With the focus of elite rowing inevitably moving towards Dornay Lake as the venue for the 2012 Olympic rowing, there is an opportunity for Holme Pierrepont to emulate Dornay's success as a club training venue.

Within the East Midlands, there is the potential to develop a range of such centres if the commitment is there. The facilities at and around Loughborough; the centres for disability sport at Boston and potentially at Loughborough; the tennis centre in Nottingham; sailing at Rutland Water; watersports at Holme Pierrepont; and golf are just some of the facilities that could be marketed to provide a regular 'sports camp' tourism income to the region. The National Golf Centre at Woodhall Spa does run some weekend golf coaching camps over the summer months.

The facilities and expertise at these centres of excellence could also be used for sports 'business' tourism by training officials, coaches, and club managers with national level coaches on hand. Whilst this does already occur to some extent, there is scope for an increased number of courses, with accompanying economic benefit.[66]

[65] "Sport and Adventure Tourism", Simon Hudson, 2003
[66] Further research is required to understand market demand, capacity issues, conflicting priorities and to develop these concepts.

14. Sports Business Tourism

Summary

Sports related conferences realised £2.24 million income to the region in 2004. There is potential increase this by:

- Targeting more sports related conferences into the region
- Build on the region's strengths at the forefront of sports science and medicine
- Destination Marketing input is required to attract delegates to stay beyond the conference

14.1 Introduction

The distinction between business travel and personal tourism is becoming increasingly difficult to make. The categories increasingly overlap as business conferences are held in attractive resorts where delegates and their partners can enjoy their free time and a weekend in addition to the business element of the travel. Furthermore, there are growing categories of traveller that do not fit neatly into either box: such as students and temporary workers. However, as the results from WTTP show, business travel is a significant sector, estimated to account for nearly 19% of all travel and tourism in the UK in 2004[67].

As a result strategies need to include both business and recreational requirements, and companies and universities seeking to attract overseas employees and students need to consider the 'tourism' element. In the same way as for personal tourism, we need to analyse:

- What the market requirements are.
- What the East Midlands has to offer.
- What needs to be improved to better meet the market requirements.
- How to co-ordinate and promote the offer.

What is important to business tourism? The overall experience is derived from many factors:

- Quality of venue and facilities.
- Ease of access – transport links, parking, proximity to major transport hub.
- Ease of booking (one-stop shop for all requirements).
- Flexibility and Customer Service.
- Cost and Value.
- Attractiveness of Surroundings (for delegates and partners).
- Security (e.g. not in a high crime area for car theft).

[67] "The Business of Sport Tourism", Ross Biddiscombe, Sport Business 2004

In the area of sport, business tourism can be thought of covering: sports conferences; skills and training courses; coaching and umpiring courses.

14.2 Sport Related Conferences

The East Midlands is home to hundreds of conference facilities, including hotels and dedicated facilities. It is not the aim of this report to list all such facilities. In Appendix 11 we provide summary details on some of the major conference facilities, focusing on those at sports grounds and stadia and other major conference centres.

In addition to sports-related conferences, sports events or facilities can be used to attract conferences of any type. Many conferences are now run on a schedule of morning and evening sessions, with the afternoon being dedicated to leisure activities. These can range from attending sports events to participating in organised activities. They act as an attractor for conference organisers, attendees and accompanying partners alike. When scheduled to coincide with sports events, the conference can be used to attract additional spectators on days not traditionally sold out, with the option of the conference attendees staying on after the conference has finished for the finals. The event, the tourist economy and the regional image are all enhanced as a result.

As part of this study, we examined in some depth the sports related conferences in the region – current activity and economic impact, regional strengths and development potential. A separate report has been issued and the main findings from that report are detailed here[68].

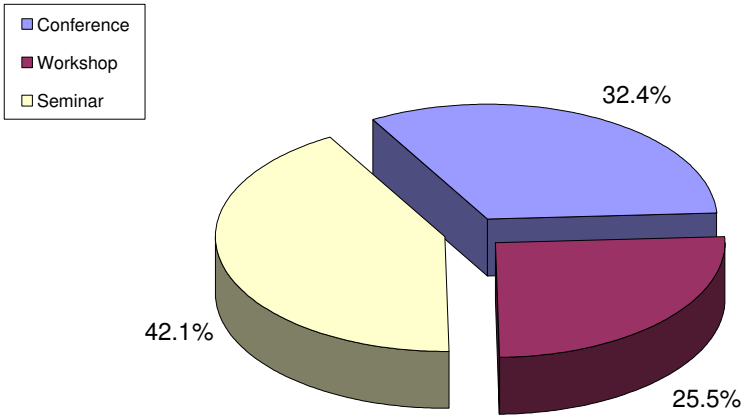
We found 153 conferences, seminars and workshops in the region in 2004 and a further 229 scheduled for 2005. The conferences occur annually and many have been formed in the last few years since the development of county partnership schemes. Several of the smaller seminars and workshops are repeated regularly throughout the year. Of the major sports-related conferences that regularly take place in the East Midlands, the largest is the FitPro conference held at Loughborough University over a period of three days twice a year, attracting an international audience of over 1,200 participants to each event. Other areas of interest to conferences and seminars include sports business and sponsorship; sports science and psychology; coaching development; and sport in the community.

[68] *emda:* "Sport related conferences, A report on activity in the East Midlands", June 2005

14.2.1 Types of Conference and Economic Impact

By number of events, seminars make up the largest proportion of sports related events held in the region at 42.1%. The smallest proportion is workshops at 25.5%. Conferences make up 32.4% of the total.

Figure 4: Proportion of Conferences, Seminars & Workshops (2004)



Source TBR - Ref: W1/C5

14.2.2 Income and Expenditure

The distribution of income from the different types of event provides a contrast to the volume of events. We have calculated that sport related conferences, seminars and workshops generated an income of £2.24 million in the region last year.

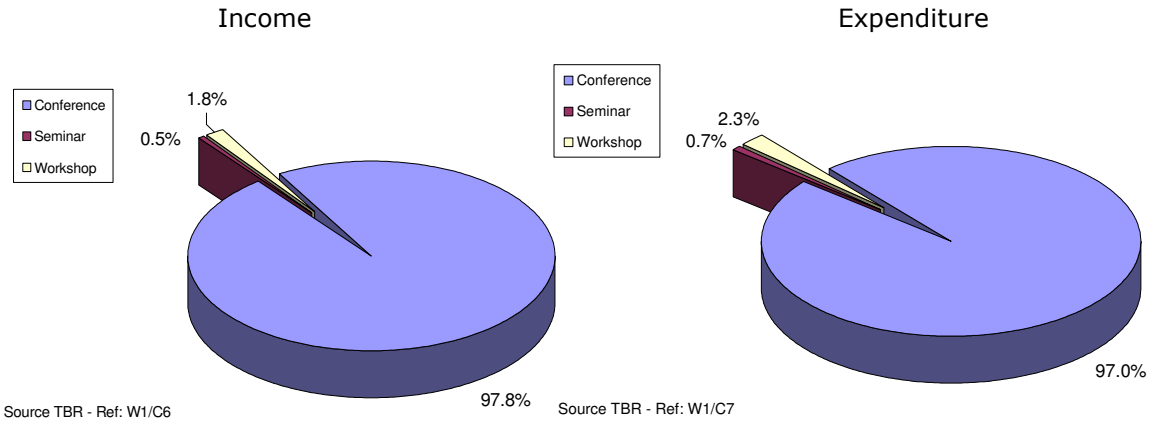
Figure 5 shows that the events that have the least income are the seminars despite this sector having the greatest proportion of actual events. 97.8% of all income is from conferences. It is reasonable to expect that since conferences are larger events with greater numbers of delegates and higher delegate rates, they will earn more. Conferences will usually have speakers well renowned in their field and sometimes be compiled of 'sub-events' making them more attractive to a wider range of people who will accept higher fees.

The key implication of this finding is that a marginal increase in the number of conferences staged in the region would produce a higher marginal increase in revenue than a similar increase in seminars or workshops.

Looking at the expenditure chart in Figure 5, we can see that there are slightly higher proportions of total expenditure in seminars and workshops than there was of income. Conference expenditure is slightly less. This translates itself more clearly in Figure 6 where

we can see there is no profit at all from seminars, a very small proportion of the total profit from workshops and the vast majority of profit is from conferences.

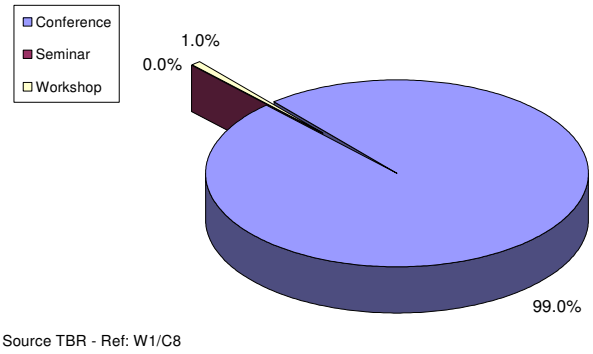
Figure 5: Income and Expenditure from Conferences, Seminars & Workshops



14.2.3 Profit

Based on return on expenditure, the overall profit margin from conferences, seminars and workshops is 37%. Figure 6 below indicates that conferences account almost entirely for the profits made by these events. Seminars contribute nothing (they break even) and workshops contribute only a tiny proportion.

Figure 6: Where the profits are made: Conferences, Seminars & Workshops



Appendix 12 summarises some recent and forthcoming sports conferences held in the East Midlands. In addition to these, we need to look at areas of strength in the region to develop potential areas for sports conferences.

14.3 Potential for Sport Conferences

There are a number of avenues for the development of sport related conferences in the region. At a very simple level we saw above that 42% of events were below capacity.

Destination Marketing does not appear to feature strongly within the agenda of any of the organisers we spoke to. They see their job as getting people to the conference, and often are not concerned with additional activities (such as theatre trips and meals out or even in some cases accommodation) that delegates could undertake whilst staying for the conference, and we discovered no one promoting stays beyond the conference dates. The universities are at a disadvantage because their accommodation is not available for stays beyond the conference in the same way a hotel's would be. Therefore, their ability to encourage delegates to stay on and see the region is limited. Despite this constraint, by working with the DMPs, the opportunity exists for conference venues to promote the region to a large number of visitors with minimal additional resource implications.

We spoke to a large range of hotels with conference facilities, but none recorded having hosted a sports related conference, seminar or workshop. The fact that they quite often promote their extensive sport and leisure facilities such as tennis courts, swimming pools and indoor games courts would make them an attractive location for people connected to sport. Although staff members from the sports centres of hotels recognise their potential strengths to attract sports related conferences to their venues, the conference co-ordinators within the hotel complex generally do not specifically target this (or any other) sector.

There is some evidence that hotels located within relatively close proximity to sporting venues do attempt to proactively develop sports related business opportunities. With a more systematic approach and in an integrated manner aligned to other general business development opportunities this sector could be further developed.

14.3.1 Regional Strengths

The region has key resources in the context of sport conferences, particularly in Loughborough University and Queen's Medical Centre. Our work suggests that more could be done to play to these strengths.

Biomechanics

The Biomechanics Research Group at Loughborough is concerned with topics such as computer simulation of jumping and gymnastics, impact biomechanics and automated human

movement tracking systems. There is no evidence of any related conferences being held in the East Midlands.

International conferences include Salford's annual International Conference on Biomechanics and the World Congress of Biomechanics. This congress occurs only every four years, and is the premier event in biomechanics from the World Council of Biomechanics. The 2002 event was attended by over 1,500 world-leading researchers in all areas of biomechanics. The 2006 event will be held in Munich, Germany. Previous events were in Sapporo, Japan (1998), Amsterdam (1994) and San Diego (1990). The East Midlands could target the 2010 event.

Sports Psychology

Another strength for Loughborough University is sports psychology. The FA is runs a sports psychology conference at Pride Park in Derby so there is some related conference activity in the region but there should be scope to extend this.

Other Research groups at Loughborough

Loughborough is renowned worldwide for its high quality and wide ranging research. This high status position was confirmed (December 2001) by the award of a 5 star rating in the 2001 Research Assessment Exercise (RAE). There are research groups covering a wide range of topics relating to sport, leisure and physical education in addition to the above mentioned. These groups include Exercise Physiology, Sociology of Sport, Sport & Leisure Policy Management, Physical Education and Pedagogy, Physical Activity & Health, and sports engineering. Coupled with the expertise in sport-related medicine at Queen's Medical Centre, there is scope for a wide range of conference topics to be held locally.

14.3.2 Other Areas of Potential

General Coaching

Greater Manchester, Shropshire and Dorset all have annual sport coaching conferences. There are also sport-specific ones such as the British Swimming Coaches and Teachers Association (BSCTA), held in Stoke-on-Trent in 2004, and the Tennis Scotland Coaches Conference held in Edinburgh.

Although there are a number of small scale coaching seminars and workshops held in the East Midlands there should be scope for larger scale events of national interest.

Cheerleading Coaching

On 23rd and 24th October 2004, Guildford hosted the British Cheerleading Coaches Conference, where it has been held a number of times. The International Cheerleading Championships and British Cheerleading Championships were held in Nottingham in 2004. It was the largest event of its kind in Europe with 3,000 participants over 4 days. In 2003 it was held at Loughborough University. As such it should be possible for the region to host the conference on a regular or semi-regular basis.

Sport and Law

One subject for sport related conferences prevalent in the USA but not elsewhere is how the law impacts on those involved in sporting events and promoting sport. These cover topics such as doping in sport, options for the legal status of organisations, equal rights in sport, negotiating contracts with players, licensing rights, and representing players (agents). Whilst the USA does have a reputation for a more invasive legal system than the UK, these are all topics that impact in this country. With this, there is the opportunity to develop a new event within the region.

15. Sport for Economic and Trade Development

Summary

With proper planning and management, sports and sports events can contribute greatly to the wider economic and trade development of the region. With the exception of motorsports, the potential for this has not been addressed in the East Midlands. Public sector agencies have a pre-eminent role to play in delivering the benefits through:

- Supply chain initiatives to sports events and venues.
- Using sports events to showcase regional industries.
- Using sports events to showcase the region to inward investors.
- Using events and clubs to develop and strengthen trade links with overseas countries.
- Using events and conferences to position the region as a Centre of Excellence in sport and develop a knowledge based sports business cluster.

The 2010 Commonwealth Games in New Delhi represents a major opportunity for the East Midlands to develop and strengthen trade links. With a strong Asian business population the East Midlands is ideally positioned to benefit from a planned and targeted campaign. EMIC must take the strategic lead, and liase closely with UKTI.

15.1 Overview

The focus of this study is sports tourism. Sports and sports events can, however, contribute enormously to the region's economic and trade development in industries well beyond sport itself. There is therefore a wider scope in this chapter to look at the cross agency working that is required to develop the full potential of sports to the regional economy.

Sport can be used to help drive improvements in business and trade for many of the region's industries. The opportunities include - but are not limited to - supplying events and showcasing the area and its advantages to overseas customers and investors through targeted initiatives thereby attracting inward investment and building relationships with overseas customers, suppliers and investors. The concept of using sport for trade development is embryonic in the East Midlands, as it is in most regions, with few examples being found to date. The exception to this is the well-established High Performance Engineering – Motorsports links where the East Midlands has leveraged its position to considerable advantage in inward investment. It is important to recognise that the potential is not limited to sports related companies.

An essential element of success in these activities is a plan, including strategic partnerships with UK Trade and Investment (UKTI), *emda*, regional chambers and councils. This should comprise an overall strategy stating the desired outcomes and objectives for the region in using sport to stimulate international trade and attract inward investment. These objectives will include for example the balance between cash investment in existing businesses, trade with existing businesses and new start up activity. The strategy will need to be agreed with all stakeholders with periodic reviews with 5-year and 10-year timescales for success. Within the strategy it is important to identify the target industry sectors that will benefit from this intervention, and the target potential investment markets. For the East Midlands there are existing trade links with the USA and a strong base of businesses with links to Commonwealth countries that could be appropriate for links developed through sporting activities. Finally the key individuals and organisations to be targeted need to be identified, and specific actions allocated to individuals and partners within the East Midlands to deliver the appropriate contacts and introductions.

UKTI has a section within the construction team that focuses on international trade activities related to sport. This team has historically had a focus on construction and infrastructure projects such as stadia construction, and are a valuable tool for overseas promotion of East Midlands businesses with a track record in this activity, for example Elequip Projects who installed electrical systems in the Walker Stadium in Leicester. The scale and value of construction contracts dominates the UK trade balance in sporting activities, and so this focus is entirely appropriate.

The UKTI team will also play an active role in promoting service and other manufacturing businesses, through trade missions, inward missions and commercial officers in embassies. In particular they will provide information about the requirements of forthcoming international sporting events, such as the Cricket World cup 2008 in the West Indies, and facilitate introductions and meetings with appropriate Games officials. This is a useful mechanism for regional businesses to start to engage with overseas event organisers, and has been utilised by East Midlands companies such as KAM Ltd, a Derbyshire based sports consultancy.

One feature of sporting events is that the organisers of major Games and similar events tend to rotate from event to event and country to country, and so any relationships formed may have long lasting benefits. Any successful activity is likely to lead to future invitations to bid for work, though the timescale between events may be years rather than months.

Key target sectors for the East Midlands to promote will include motor sports and automotive activities, the textiles and leatherworking sector, ICT, food and drink, and naturally the Sports

Industry and Tourism. The geographical and logistical advantages of the region should be emphasised as well as the industry-specific benefits, particularly to inward investors.

There are 5 main areas where Sport can be used in stimulating international trade and/or inward investment into the region. These are considered individually in the following sections.

15.2 Supply Chain Initiatives

The most direct way to use sports events to benefit the regional economy is to ensure that money spent on events in the region stays within the region, and helps to develop a competitive advantage and track record for businesses in the region. The hosting of sports facilities and events often requires significant expenditure on a range of suppliers: ticketing, security, seating, catering, publishing and printing, office equipment, IT, marketing and promotion, to name but a few. Many of these suppliers to East Midlands' events will be based outside the region. As such a large part of the economic benefit of the event, and the associated employment, immediately leaves the region.

Through the economic impact analyses being carried out as part of this study using the DREAM™ model, the additional expenditure generated through sports events is traced to determine how much of the income remains in the East Midlands region. This gives a measure of how much of the supply chain for an event lies with companies outside the region – direct suppliers to the event and at a number of stages removed (i.e. those supplying the suppliers). Whilst recognising that a portion of the income will always leave the region, the model gives a measure of the potential to increase business for East Midlands companies as a direct result of local supply chain initiatives to such events. Additionally gaps in the East Midlands economy are highlighted. The establishment of local supply chain initiatives would also lead East Midlands firms to improve their competitiveness in supplying events outside the region.

It is not realistic to expect event organisers to replace existing suppliers with more locally based ones unless this is a simple activity, and leads to commercial and quality benefits for the events – there is an associated risk element that makes many event organisers averse to change. This is in fact an opportunity for local businesses, because once the barriers to entry have been overcome there is likely to be significant lock-in providing acceptable standards of delivery are met. *emda* should invest in mapping the regional ability to supply into all aspects of hosting sports events and invite the major event organisers to a 'Meet the Buyer' event. Much of the background work for this initiative has already been carried out[69]. What is now

[69] "The Economic Impact of Sport in the East Midlands", *emda* / KKP and York Consulting, 2004

required is to use that information with a focus on deriving economic benefits. In this way, event organisers will be exposed to a wide range of alternative suppliers that should prove to be mutually beneficial. Local authorities are in any case being encouraged to buy from local SMEs in order to enhance diversity, choice and competition within the marketplace, and as major stakeholders in sporting events should be able to guide other partners into considering the offers from local firms.

Where possible, regional venues should be encouraged to adopt a local supply chain bias when reviewing existing contracts – either by moving suppliers or insisting that non-regional suppliers to use a percentage of local sub-contractors for their needs. For this, the regional and sub-regional public sector agencies have a key facilitating role to play.

As well as organiser-supplier links, it is important to develop sponsor-supplier links in order to develop opportunities beyond the immediate supply to events. In many cases the sponsors have far larger supply chain requirements than the event itself and therefore constitute a far larger opportunity. These opportunities fit into an overall supplier mapping and supply chain initiative as discussed earlier.

For many companies, the track record of delivery to major events has been a significant contributor to future business development. For example, Idaho Technologies in Manchester won the contract for website development to the Athens Olympic Games Business Club as a direct result of their successful delivery at the Manchester 2002 Commonwealth Games. After one success the barrier is far lower for future events[70].

15.3 Showcase Regional Industries

Sports events can be used to help showcase regional industries to the local population and visitors alike. Exhibitions at events will be seen by many visitors and help to raise the profile of industry clusters. Obvious contenders for this are industries such as Food and Drink, Textiles and Motorsports, which can provide interesting and attractive exhibitions and tradestands. The sub-regional DMPs and SSPs must take the lead in delivery of these objectives, in partnership with the regional industry cluster groups. LeicesterShire Promotions are leading on this and are currently engaging with local food and drink suppliers to target the sports sector.

Organisations such as the East Midlands Fine Foods Forum can provide a tailored range of foodstuffs for sale, either for consumption on-site or as 'take-home' food. A very successful

[70] Following the success of the Sydney 2000 Olympic Games, Austrade estimate that around 35 Australian companies won Athens 2004 contracts worth up to $200 million; Tim Harcourt, 2000

example of this is the Burghley foodwalk. Whilst not tailored to regional food and drink, this is a major attraction at the Horse Trials and is a significant source of trade at the event. The promotion need not cut across established suppliers, as most event catering is for on-site consumption only. Any such initiative should also ensure that it ties into the 'Taste England' campaign being co-ordinated by Visit Britain.

These showcases need not be confined to events within the region, but can be co-ordinated with overseas chambers of commerce and with UKTI for international events for example in motorsports or rugby, or at sporting events in other regions of the UK.

15.4 Showcase the Region for Inward Investment

With the exception of Motorsports, little thought appears to have been given to using sports and sports events to attract inward investment. This needs to be a long-term, planned and targeted initiative, ideally co-ordinated by EMIC and the inward investment arm of *emda*. Part of the offering for potential investors is to position the East Midlands as a vibrant place to live and do business. The range of internationally significant sports events can be used to emphasise this. By timing trade missions to the region to coincide with major events of interest, potential investors can see the region to best advantage.

Clearly the ongoing future of Silverstone F1 Grand Prix, as well as Donington Park and Rockingham, is vital to continuing investment in High Performance Engineering in the region. The extended supply chain in the industry accounts for a multi million pound industry and thousands of FTE jobs in the region.[71] Racing events at Donington and Rockingham can be used for entertaining potential investors, and other events on the racing circuit can be used for promoting the region. Track racing at the circuits is also a potential attractor for tourism, business conferences and for entertaining potential investors. The high international profile of Motorsports should be used to raise awareness of positive aspects of the region.

The regular presence of visitors from overseas (and other regions of the UK) for international sports events is an opportunity for the region, particularly as these sports often include a significant element of business people and decision makers. Equestrian sports are Olympic and international events, and the importance of Burghley is its strength in attracting riders from around the globe, allowing the event to have both national and international reach. The event is supported by premium sponsors, and attended by high net worth individuals and so is an ideal showcase for the region as a place to locate and do business.

[71] See: 'The Economic Impact of Sports in the East Midlands' *emda* / KKP and York Consulting, 2004

15.5 Use Major Events and Professional Clubs to develop Trade Links

Major events and regional high-profile sports clubs can be used to develop trade links with target markets. This was done to great effect by 2000 Sydney Olympic Games, Manchester 2002 Commonwealth Games, 2003 Rugby World Cup and the 2004 Athens Olympics[72]. Whilst there is no ambition for the East Midlands to host events on this scale, the region will benefit from London being awarded the 2012 Olympic Games. The excellent sports training facilities in the region could be used to pro-actively target countries either with which the region has, or would like to establish, strong trade links. This would provide an excellent platform for reciprocal trade missions. UKTI should be used as a partner to establish the main target countries for future trade development for the East Midlands, concentrating on the regional industrial strengths.

Events such as pre-season overseas tours by football clubs can bring benefits to the region, and need not be confined to high profile Premiership clubs. Stockport County FC, a League 2 team, have extensive links with China and Chinese clubs that translates into business links between Chinese business communities in both countries. Co-ordination of these overseas tours with trade missions can use the profile and prestige of the club to enhance the region. The planning for summer tours needs to involve business planning, and possibly UKTI and EMIC, in order to maximise the opportunity to build links with key overseas business partners.

Nottingham Forest's 2004 pre-season tour in the US with their sponsors Capital One provided an excellent opportunity to use the team to promote the region as a place to do business, and to strengthen links with an already established inward investor in the region. The tour also allowed the region to build new links with new potential investors on the strength of the existing relationship with Capital One e.g. Sunrise Senior Living.[73]

Both Liverpool FC and Manchester United participated in a pre-season tournament in the US in 2004. Only Manchester, through Manchester Investment and Development Agency Services (MIDAS), developed a trade mission to coincide with the tournament. This followed on from earlier experiences using Manchester United's popularity in Malaysia, combined with the 1998 Commonwealth Games in Kuala Lumpur, to develop strong trade links. Manchester

[72] Examples include: Rugby Business Club Australia, formed for the 2003 World Cup, has confirmed A$190 million in export sales by Australian members, (Rod McQueen, RCBA International Patron); The Commonwealth Games Business Club generated £1.6million of additional business for North West based companies, (PAWA Consulting); Business Club Australia at the 2000 Sydney Olympics was particularly successful at bringing SMEs to the international market exporting knowledge based services (Susan Kawhati, Austrade 2000)

[73] Bill Brickley, The East Midlands, Washington Office, 2004

United's tour of the Far East in Summer 2005 will be co-ordinated with North West Chambers of Commerce, the Small Business Service and UKTI and will involve MUFC personnel in publicity activities and face-to-face meetings.

Timescales of competition events can be an issue since for many competitions the opponent team is not known until shortly before the match. The Nottingham Panthers ice hockey team, however, recently competed in France with teams from Ukraine, Italy and elsewhere. This could have provided an opportunity to combine trade development with the sports tournament. There are also some events that can be predicted, and planned for or are at least probable. For example, the schedule of cricket tests is known until 2010, and it is probable that Trent Bridge will host one test match and one-day international match during each season. The visitors will come from Commonwealth countries that already have long standing links with the UK, and this can be used as the basis for developing new or deeper trade relationships. Leicester Tigers are regular participants in Rugby Union's Heineken cup, and will have matches with clubs from Ireland, France and/or Italy. Sadly, Leicester City, Nottingham Forest and Derby County are not likely to be participating in European football in the near future.

With the Olympics awarded to London for 2012 there will also be opportunities to attract potential investors to the region as a base for attending the Games. Such opportunities need to be planned for well in advance to derive maximum advantage from this unique opportunity.

The Commonwealth Games in New Delhi in 2010 represents one of the most important opportunities for the East Midlands. India is a huge market and is becoming more open to overseas companies. Economic growth in India has averaged between four and seven per cent over the past five years and with a population of over 1 billion people (which will eventually outstrip China) and a middle class of 285 million people the opportunities are immense[74]. With a strong Asian business community in the East Midlands the region is ideally positioned to benefit from inward investment and for export of UK products and services. A targeted programme of activities to develop and strengthen trading links is required. This should build on existing activity: for example Leicester Tigers planned, promoted and participated in a UK tour by the Indian national team. East Midlands is shortly to undertake a seminar tour of India aimed at encouraging inward investment by Indian companies in the Midlands. EMIC should take the lead role in planning and co-ordinating the activity for the region, and must ensure the region takes full advantage of UKTI planned trade missions.

[74] Tim Harcourt, Chief Economist, Austrade, 2004

15.6 Establish East Midlands as Centre of Expertise

The reputation of the East Midlands as a centre of sporting expertise could be enhanced by provision of presentations at many events on topics of general interest to the sporting community. These might include opportunities to hear from local champions and sporting celebrities, talks on child protection for clubs with a junior section, on fundraising and running sports clubs, or on advances in sports equipment and clothing or nutrition and psychology in sport. Whilst these are unlikely to bring any immediate economic benefit, they would position the region, its Universities and its companies at the forefront of international sports.

The skills and academic knowledge at Loughborough and other centres of excellence could also provide the basis for a commercial knowledge based sector of consultants, trainers and experts. Retaining Loughborough graduates in the region in sports service industry roles would help develop an active network of initially small businesses with potential global reach. A key part of this would be the establishment of an East Midlands sporting brand that could be used to provide a unique identity for the region, and provide a common link through all presentations, for example:

The East Midlands – the heart *and* mind of UK Sport

The region should look to host international conferences, and have a higher presence at national and international conferences to consolidate this position of pre-eminence, and translate that position into opportunities for bringing in sports businesses, as well as governing bodies and sports tourists in order to create a thriving Sports Industry cluster.

Key Recommendations

- Map the regional capability to supply the wide range of needs of sports venues/events.
- Deliver 'Meet the Buyer' events to bring regional suppliers together with sports venues, event organisers and sponsors.
- Regional industry cluster groups to showcase their industries at major events.
- Develop long-term plans to co-ordinate sports events with inward investment missions.
- Work in conjunction with UKTI on overseas trade missions.
- Combine trade missions with regional sports teams' overseas tours or competitions.

16. The Wider Socio-economic Benefits of Sports Tourism

Summary

Although local examples of good practise exist - such as the Festival of Tennis - the East Midlands, in common with most regions, does not take full advantage of the potential socio-economic benefits that sports events and sports tourism can deliver. With partnership working, sports and sports events can contribute to improved:

- Social Inclusion
- Education and Employment
- Regeneration
- Sport Development

Often sports can attract people who do not engage with more traditional opportunities. The key regional stakeholders need to carefully consider the issues raised in this overview and determine how to design and implement programmes to deliver the benefits.

16.1 Overview and Context

This section of the report considers the contribution of sports tourism to East Midland Development Agency's wider social objectives. These issues are in themselves a major topic and this report can provide an overview set within the context of the impact of sports tourism.

The government recognises that 'sport is very powerful both in the pursuit of excellence and helping to tackle social and health problems'[75]. Within the Framework for Sport in England[76] it is also recognised that sport can 'help to achieve a wide range of socio-economic objectives' through, for example, sports related employment, major events, and volunteering. This is particularly the case in relation to crime and drug misuse reduction strategies.

On a regional level the Regional Economic Strategy (RES) for the East Midlands, Destination 2010, establishes a number of targets against which the East Midlands can measure its success, and included within this are relevant targets relating to:

- Employment, learning and skills
- Tourism and culture
- Urban regeneration

[75] DCMS website, www.culture.gov.uk/sport
[76] Sport England, 2004

In particular the Tourism and Culture strand identifies that "more than 25,000 people in the region are employed in jobs that are directly related to sport" showing "growth of over 300% in the last decade". Of particular relevance to this section of the report is the identification within the RES of sport having "the capacity to connect individuals whatever their circumstance." And further stating that "this characteristic can be built upon in empowering communities generally, but may be particularly significant in developing the economic capacity and performance of disadvantaged communities and individuals. Again this characteristic is under exploited to date and should be developed".

This section of the report reviews how sports tourism can benefit communities and individuals in the East Midlands.

16.2 Regeneration

In many instances links are not made between sporting events and regeneration. It is frequently difficult enough (in terms of time and resources) for event organisers to deliver the event, and there are few or no opportunities to consider wider issues such as social inclusion, skills development or increasing local participation. However, regional and local regeneration partners can undertake this work and by working closely with event organisers can develop their own linked activities to address these issues. This is a key area for public sector intervention.

Examples of such activity outside the East Midlands include the Social and Economic Legacy Programme developed for the 2002 Commonwealth Games in Manchester and the NRF funded activity undertaken in the London Borough of Newham in relation to the London 2012 Olympic bid. Both these programmes included a range of regeneration activities aimed at health, education, volunteering, young people's and, of course, sports projects. Whilst hosting such major events is currently outwith the scope and ambition of the East Midlands, valuable lessons which can be transferred to smaller scale events can be learnt from their strategies.

Within the East Midlands, sport has been an integral part in regeneration of at least two areas: the £40 million National Ice Centre in Nottingham's city centre and multi-sports facilities in the £50 million Braunstone regeneration scheme. In November 2005 Braunstone is hosting the British Synchronised Swimming Championships – a real success for the local area in attracting a nationally significant event to a deprived ward in Leicester.

On a local level an excellent example is demonstrated in the DABSI (now Princess Royal) Arena Sports Development Plan[77]. This plan considers the potential for major sporting events at the stadium with the aspiration to host an international athletics meeting, and also includes significant consideration of excluded communities, of potential participation opportunities, and of volunteering and skills development. The plan also shows positive partnership working between sports governing bodies, local clubs and other partners to achieve these aims.

Across the East Midlands there are a range of regional and local regeneration partnerships addressing issues of social and economic deprivation. The new Urban Action Plan for the region identifies five key themes for action, of which one is 'Tourism, Culture and Sport'. This provides an excellent framework within which planning to maximise the socio-economic benefit of major events can and should take place[78].

16.3 Partnership Working

In common with most other regions, the East Midlands region does not have a long standing tradition of partnership working around major sporting events. This has, however, begun to change with significant partnership activity taking place with relation to the British Open Squash Championships in Nottingham and the 2004 Tour of Britain. The focus on events and branding has enabled a 'communications plan' to be developed that was briefly tried in relation to the Tour of Britain, and fully utilised for the Squash Open. This partnership working brings together *emda*, Experience Nottinghamshire and other key partners, addressing such issues as secondary spend, overnight stays and raising the awareness of events within the local hospitality and business communities as well as the general population. The project has included city dressing, websites and the production of print for distribution throughout hotels and businesses in the locality. The experience and outcomes of this activity should be shared across the region as a whole with a view to developing a generic organisation template, enabling greater benefit from a wide range of events, without treating every event as a 'one-off'.

15.4 Diversity and Social Inclusion

The East Midlands is a diverse community, with black and minority ethnic communities making up approximately 6% of the East Midlands population, and living particularly in the urban areas. Consideration is given here to these communities, and the potential to engage and involve them in major sporting events.

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[77] Focus Consultants UK Ltd. 2002

[78] The Event Evaluation Tool discussed in Section 10 considers the social as well as the economic benefits of sports events. See also Appendix 4.

A number of community sports projects related to black and minority ethnic communities exist within the East Midlands,[79] but to date they have not been linked to major events. They work, amongst other things, on ensuring distribution of grants to, and training coaches from, minority communities. They report that minority communities can face difficulties in accessing information about major events and that for many people the general lack of minority ethnic involvement in the events themselves can be off putting. Difficulties include language needs and the methods and location of event advertising not reaching minority communities. Direct targeting of information to those communities could ensure more minority communities are encouraged to attend events, and all communities must be made to feel welcome at the events.

Football was raised as a specific issue. This is an extremely popular sport amongst young black and minority ethnic communities, but that they do not generally feel welcome, either from their own experience or through the high profile given to racism at football matches. This is clearly a national matter of concern, and a number of measures have been taken. Leicester City F.C. recently held a community open day that was attended by large numbers of people from black and minority ethnic communities.

Leicester Tigers have regular Monday evening fixtures which feature development or academy players. These fixtures are aimed at family and younger spectators to introduce them to and further their understanding of the game. Schools are actively involved through a system of ticket allocation. The audience on Monday evenings is quite different to that for weekend matches resulting in improved community inclusion in the sport.

However, stakeholders recognise that in general there is still significant work to be undertaken by sports clubs to engage people from all ethnic communities.

16.5 Education and Employment

From a regional perspective the issues of education, employment and training are at the heart of the Regional Economic Strategy, and a number of other regional and sub-regional strategy documents.

16.5.1 Education

Sport England's Framework for Sport in England (2004) provides evidence that sport improves educational attainment. This includes:

[79] Examples include Leicester Race Equality Council Sports Partnership and Voice East Midlands

- Specialist Sports Colleges had 5% more pupils achieving good GCSE results than other schools.
- Learning within a sporting environment tends to be more comfortable and less threatening to those who have not participated in learning for some time.

Engaging education authorities in sports events provides an impetus to learning, and a way of engaging those pupils who are particularly attracted to sport. Again Leicester Tigers have been at the forefront of engaging with schools; their tag rugby school participation events are embedded in the Saturday afternoon programme to the benefit of both the club and the participating schools.

Instructive material for using sports events to improve educational attainment in mathematics, physics, arts and other national curriculum subjects has been produced by major events such as the 2002 Commonwealth Games and the London 2012 Olympic bid. The 100m sprint was used to demonstrate distance/time graphs, and pictograms from previous major events were used to develop arts projects. Gateshead Council has recently produced and distributed a learning pack "Tracks to Health" to all local area schools based around the Gateshead International Stadium re-development. A co-ordinated activity with the education authorities could produce materials for use at a range of existing sports events in the region.

There is a close relationship between local schools and the Nottingham Open Tennis for sports development activities (see the following section for more detail), but the potential for wider educational activities around sports and sports event are not addressed at a co-ordinated level, although they may be at an individual level by participating schools. As an example, the event could be used as an introduction to sports journalism by holding a competition for schools to produce a press release on the days events. This might take many forms, including access to interviewing the players, or a short talk by a sports journalist or photographer. In this way, literacy, computer, teamworking and organisational skills could be taught in a fun and stimulating environment.

16.5.2 Employment

In the context of this report one of the major issues is that of skills shortages in the tourism industry. Employment in sport and recreation related activities nationally has recently risen to over 620,000 people, with forecasts that it will rise to over 750,000 by 2008[80]. With the

[80] www.skillsactive.org.uk

successful 2012 Olympic bid, these estimates will inevitably increase, at the very least between 2008 and 2012 when the major sports championships will focus on the UK. LOCOG estimate that in 2012, there will be 100,000 people involved in the Games including 70,000 volunteers.[81]

This is both an opportunity and a threat to the East Midlands. A huge opportunity to increase the skillbase and experience of people from the region, and a threat if the Games draws people – temporarily or permanently – away from the region and exacerbates the skills shortage. This depends on whether the Games increases or simply redistributes employment.

The Athens 2004 Olympic Games Committee identified one the most positive legacies from the Games was the training of a new generation of managers and the development of new techniques for risk assessment, contingency planning and project management. [82]

The Workforce Development Strategy for the Tourism and Cultural Sector in the East Midlands Region 2002-2005 outlines the fact that there is nearly full employment in some parts of the region and the tourism and cultural sector is predicted to grow by 10-15,000 jobs in the next 5 years. The sector is already experiencing some skills shortages – particularly in management roles; coaches, instructors and activity leaders; and operational staff. The Workforce Development Strategy also recognises that the poor image of the sector – that of low pay, casual/part-time/temporary work and unsocial hours - will compound its ability to attract new employees. The strategy of the Sector Skills Council for tourism, “People First”, recognises and addresses these issues. Sports, and in particular higher profile events, can inspire people and raise their personal aspirations thereby acting as an attractive route into employment within the wider tourism sector.

The East Midlands’ Tourism Strategy 2003-2010 focuses on seven key areas, of which one is Business Support and Skills. Within this key area the strategy identifies that ‘recruiting staff of the right calibre is one of the most difficult challenges for tourism operators in the region’, and identified the following points:

- Jobs in the tourism industry are not highly regarded.
- The need to harness older workers and volunteers to the tourism industry.
- The potential to link with national initiatives (e.g. Springboard UK).
- The need to raise the quality of training.
- The need to increase skill levels.

[81] Mike Power, Chief Operating Officer 2012; Power of Sport Conference, Gateshead 2005
[82] Costas Cartalis, Secretary to the Athens Games; 2005

This is an area where sports tourism can act as a positive driver for tourism more generally. Whilst jobs in tourism may not be highly regarded, many people are extremely positive about, and excited by, the opportunity to work in a sporting environment. In addition sports tourism is one area where volunteers can be used extensively, and there are models that have used sports related volunteering as a route to employment (see Pre Volunteer Programme below).

16.6 Volunteering

There is a strong tradition of volunteering in sports, but perhaps less of a tradition of linking that volunteering to employment. The Pre Volunteer Programme for the Commonwealth Games in Manchester 2002 built upon the tradition of sports related volunteering to inspire and support individuals into employment. An accredited qualification was developed in event volunteering, and approximately 2,000 individuals from disadvantaged communities across 27 local authority areas in the North West gained the qualification, with almost half of them going on to become volunteers at the Games. Using the 'hook' of the Commonwealth Games, this programme provided qualifications and experience, assisting individuals to develop a C.V. The ongoing Post Games Volunteer Project supported individuals into further volunteering, work experience and employment.

Elements of this programme have now been replicated in the London Borough of Newham in relation to the London 2012 Olympic bid, with the development of 'Newham's Volunteer's' funded through Neighbourhood Renewal Funds.

Events need not be of the scale of the Olympic or Commonwealth Games to derive interest and benefits from volunteering. In Birmingham a similar programme was also developed in relation to the World Indoor Athletics Championships 2003, and continues to support sport and leisure activities across Birmingham, Sandwell and Dudley. The programme – the Pre Volunteer Programme – is a training, volunteering and employment initiative, forming part of the 'Pathways to Employment through Sport' programme, and provides training in such issues as Health, Safety and Emergency Assistance, Stewarding for Public Venues.

One of the key learning points from these programmes was how sport, and in particular sporting events, can attract individuals for whom traditional volunteering or training and development opportunities would probably not be appealing.

The East Midlands has a strong tradition of sports volunteering, but does not have a specific programme to link volunteering to employment. The programme does not need to be developed in isolation. The 'Welcome to Excellence' series of courses are already a

recognised tourism customer service programme that could be adapted to be sports specific. Similarly Gateshead Council has a funded Volunteer Development Officer based at Gateshead international Stadium to tailor programmes for local groups and events.

16.7 Sport Development

A good example of the way in which a major sporting event has worked with schools is the Festival of Tennis, held alongside the Nottingham Open which first started 10 years ago as a way of engaging school children and young people in tennis and sports. In its current form the Festival brings approximately 1,200 children from 50 schools to take part in a programme with 4 key elements:

- VIP Schools – LTA affiliated schools are invited to take part in a VIP programme, and those having shown the greatest commitment to tennis throughout the year are selected. The children take part in tennis 'clinics', mini tennis, participate in a 45 minute show, and frequently get to watch centre court matches at the Open
- Clinic times – Any school can apply for tennis training sessions, and again they frequently get to watch Open tennis matches
- Free entry – all schools can get free entry to the Open, although access to show court matches cannot be guaranteed
- A general introduction to sport/exercise as fun, stretching beyond tennis

The Festival capitalises on perhaps a unique experience, where 18 hard courts are available for use by the festival. Over the years additional activities have taken place, such as City Tennis Club Tournaments, community use and access to the Festival in the early evening (i.e. once schools have left for the day.)

On a smaller scale, the British Open Squash included a sport development aspect with a mini-squash tournament exhibition in the main square in Nottingham – an inflatable squash court is be erected for young people to try the sport. Junior exhibition matches also take place at the Albert Hall during the Open.

Center Parcs, a major sports holiday venue in Sherwood Forest, supports sports development by co-sponsoring and hosting the younger age group finals of the junior grand prix tennis championships in conjunction with the LTA.

Events to encourage schools and clubs involvement with the Tour of Britain and other major events in the region would similarly encourage an interest in sport.

Conclusions

The issue of social benefits is a wide ranging and complex issue, and beyond the scope of this report to consider it in any real depth. However, it is important to consider these issues as integral to the range of benefits from sports tourism. If the region is to take forward new major events, or to build upon existing events and activities, it is important to consider how wider aspirations can be met, how excluded communities can be engaged and involved, and how skills shortages can be avoided or minimised. The North West of England has taken a number of measures to build upon the experience of the Commonwealth Games, and is now building social legacy programme linked to the women's European Football Championships held in the region in 2005. London is identifying how it can benefit from the Olympic bid, and other regions are at various stages of considering these issues. It suggested that this section of the report be considered in detail by key stakeholders, with a view to maximising benefit from existing and future events.

Key Recommendations

- Use the available tools to develop a strategy to maximise the socio-economic benefits of sports events: the Urban Action Plan Culture Tourism and Sport theme and the Event Evaluation Tool (see Appendix 4).
- The experience and outcomes the pilot partnership working should be shared across the region to develop a generic organisation template, enabling greater benefit from a wide range of events, without treating every event as a 'one-off'.
- Develop a targeted information strategy to engage the black and ethnic minority communities, including event promotion and job adverts.
- Develop a structure to use sporting events to enhance educational attainment.
- Potential to develop an event Volunteer programme for the region should be evaluated.
- Formal evaluation should be conducted to assess whether children taking part in the Festival of Tennis do go on to play tennis (and/or be more active) and whether schools are able to build upon the experience in educational terms.

Part Four: Where Next?

17. Conclusions and the way forward

This report is the beginning not the end of the process. Although a huge amount of work has been carried out during this study, in reality it has only been possible to scratch the surface in terms of studying the breadth and depth of the opportunities in the East Midlands and conducting feasibility studies. Sports Tourism itself is a developing area and the market is changing as it grows – what was once 'niche' is fast becoming mainstream. For example surfing was once written off a minority sport in the UK, only for the most devoted participant. It is currently undergoing a huge surge in popularity: in the South West of England, it contributes more to the regional economy than either golf or sailing with an estimated total economic of £64 million in 2004, supporting over 1,600 full and part-time jobs. Other regions of the UK are now vying for a piece of the lucrative surfing market. Whilst the East Midlands will not emulate the South West for surfing, the Lincolnshire coast establish itself as the pre-eminent location in the UK for other emerging extreme sports, such as kite-surfing.

This report has studied the ability of sports to drive tourism, economic impact and wider economic and social benefits. The East Midlands has a wealth of major international and national events; an enviable range of facilities for elite and sub-elite sport; the natural assets of the coast, the Peak District and Sherwood Forest; man-made assets including the National Forest, canals, reservoirs and waterways, country house hotels with their large estates for country sports. The region is also home to acknowledged centres of sports specific expertise, particularly in Loughborough University and Queen's Medical Centre, which could be used to drive tourism – for clubs and coaches to learn about training programmes, nutrition, psychology, sports injuries and how to avoid them. Added to this most of the East Midlands is easily accessible to the large population centres of the Greater London, Manchester and Birmingham areas.

Sports tourism is an under-exploited area. The East Midlands has many areas of competitive advantage over the rest of the UK, but is not extracting the value from these assets.

The way forward

The future development of sports tourism in the region, and the ability of the region to derive economic and social benefits from that tourism is dependant on a range of organisations working effectively in partnerships, setting and delivering clear strategies and goals.

Strategic Development Group

A strategic development group should be set up in order to guide the strategy and direction of the industry partners and to commission future studies into specific aspects of sports tourism. To take this forward, the following needs have been immediately identified:

1. To develop a continuation strategy based on this report and the associated conference in November 2005

2. An events strategy. For sports this must include spectator and participation sports. The strategy needs to understand and influence sports governing bodies 10-year strategies in order to attract support from UK Sport.

3. Ongoing research – to understand individual sports and events in order to identify benefits, opportunities and strategies for development

4. Technical audit of facilities. This has been done in part, but needs to focus on identifying which of the Olympic and Paralympic sports holding and training camps can be hosted – and how many athletes can be accommodated.

5. Evaluation of market effectiveness. With large sums of money being spent (on marketing, staff resources, media relations), it is imperative that the effectiveness of that effort is demonstrated and not simply taken on faith.

Management, Action Plan and Delivery

To deliver the potential will require commitment and resources. Beyond the strategic development group will be a wider group and range of organisations managing and delivering the action plan. Inevitably with sport delivering across such a wide range of strands identified in the regional strategy there will be some overlap in responsibilities. The key organisations that must be involved in setting and guiding the development will be *emda*, EMT and Sport England. These organisations will direct activities which involve the wider delivery organisations as follows :

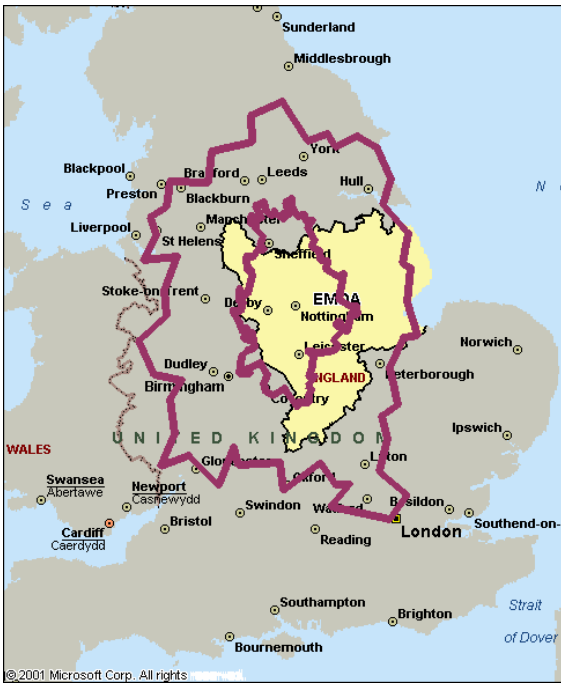
emda
Delivering wider economic benefits to regional industries Partner organisations: Sub-regional strategic partnerships, EMIC, industry cluster groups, UKTI, business support services
Deliver 2012 Olympic and Paralympic benefits Partner Organisations: Olympics Nations and regions group; Sports facilities and venues; sport support services (for example, sports physiotherapy)
Education and Employment Partner Organisations: Local Authorities, Learning and Skills Councils, Sector Skills Councils, Employment Skills Productivity Council
Regeneration Partner Organisations: Regenerate East Midlands, local regeneration schemes

EMT
Develop Events Strategy including Sports Partner Organisations: *emda*, DMPs, Sports Governing bodies, sports venues, Sport England. Local Authorities
Develop ease of access to information and bookings Partner Organisations: DMPs
Deliver 2012 Olympic and Paralympic benefits Partner Organisations: Olympics Tourism Strategy Group; Visit Britain; DMPs
Deliver improved benefits by destination marketing Partner organisations: DMPs, venues, facilities and hospitality providers
Product development: sports specific holidays and short breaks, training and coaching Partner Organisations: DMPs, Sport England, venues and facilities, media channels

Sport England
Use sports event to develop sports participation Partner Organisations: sports partnerships, events and venues, regional schools and clubs
Use sports events to deliver educational and health promotion programmes Partner Organisations: Sector skills councils, Primary Care Trusts, Learning and Skills councils, Local Authorities
Use sports and sports events for social inclusion Partner organisations: BME groups, regeneration organisations, community groups, sports venues and facilities, professional sports clubs

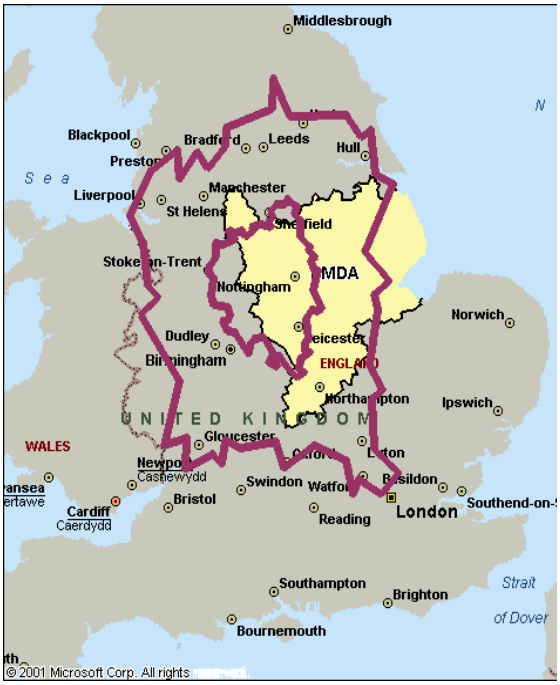
Appendix 1: Maps of 1 and 2 hour drive times to East Midlands County Towns

1. **City of Nottingham** Drive Time Zones: 1 and 2 hours

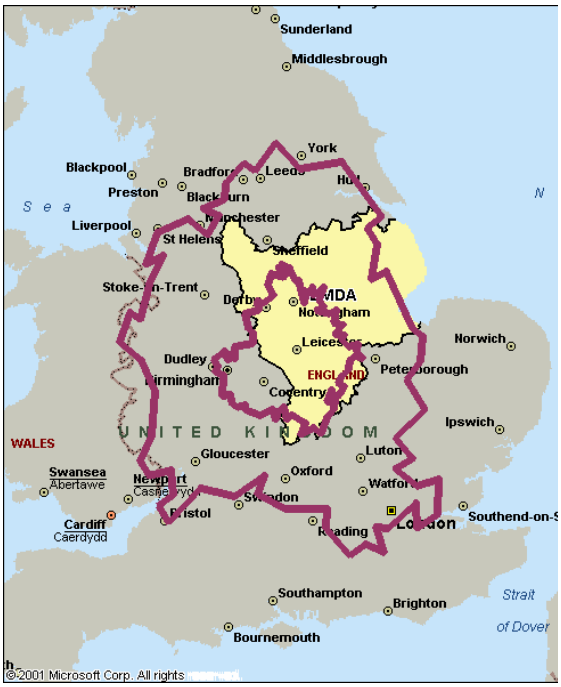


2. **City of Lincoln** Drive Time Zones: 1 and 2 hour

3. **City of Derby** Drive Time Zones: 1 and 2 hours



4. **City of Leicester** Drive Time Zones: 1 and 2 hours



5. **Town of Northampton** Drive Time Zones: 1 and 2 hours

Appendix 2: Previous Economic Impact Studies

Table 1: Events held Worldwide

Event/Sport	Year	Location	Economic Benefit	Additional Benefits	Ref
Olympic Games	1988	Seoul	£ 5.6 Bn		1
Olympic Games	1992	Barcelona	£ 15.8 Bn		1
Total of 133 Events Hosted	2000-2002	Saskatchewan, Canada	$ 34M		2
Seahawks American Football Team	1995	Washington State, USA	$67 M per annum	1 388 FTE jobs supported	3
Canada Winter Games	2003	Bathurst-Cambelton	$ 38.7 M[83]		4
Rugby World Cup	2003	Australia	A$300 M	AS$ 41M Export Trade achieved. Plus AS$ 149 M confirmed by 2006	5

Table 2: Events held in UK

Event(s)	Year	Location	Economic Benefit	FTE Jobs Supported	Ref
World Student Games	1991	Sheffield	£27.0 M	500	6
Euro 96 Football	1996	Sheffield	£ 5.8M	154	6
Euro 96 Football	1996	UK (all)	£ 120 M		6
World Masters Swimming	1996	Sheffield	£ 3.6 M	99	6
Grand Prix Athletics	1997	Sheffield	£ 0.15 M		7
European Junior Boxing	1997	Birmingham	£ 0.24 M		7
Cricket Test Match	1997	Birmingham	£ 4.6 M		7
World Badminton Championships	1997	Glasgow	£ 1.9 M		7

[83] Includes capital spend, operations and visitor spend

European Junior Swimming	1997	Glasgow	£ 0.26 M		7
Women's British Open Golf	1997	Sunningdale	£ 1.6 M		7
European Showjumping	1999	Hickstead	£ 2.2M		7
World Judo Championships	1999	Birmingham	£ 1.9 M		7
World Indoor Climbing	1999	Birmingham	£ 0.4M		7
London Marathon	2000	London	£ 25.5 M		7
Europa Cup Athletics	2000	Gateshead	£1.0 M		7
World Amateur Boxing	2001	Belfast	£ 1.5 M		7
World Half-Marathon	2001	Bristol	£ 0.6 M		7
FA Cup Final	2001	Cardiff	> £ 3M		8
World Cup Triathlon	2003	Manchester	£1.7 M		7
World Athletics	2003	Birmingham	£ 2.7 M		7
Premier Division Football Match[84]	2004	Leeds	£ 0.44M		9

Table 3: Contribution of individual sports to UK regional economics

Sport	**Year**	**Location**	**Economic Benefit**	**FTE Jobs Supported**	**Ref**
Angling		Scotland	£ 26.4[85]	794	10
Surfing	2004	Cornwall	£21M – £64M[86]	1 067	11
Sailing	2004	Cornwall	£ 52 M[87]	414	11
Golf	2004	Cornwall	£ 32 M	608	11

[84] It is generally assumed that additional expenditure into a region from league fixtures is cancelled out by an equal outflow of money from the region on the return (i.e. away) fixture
[85] Tourism Economic Impact i.e. visitor origin from outside Scotland only
[86] Reported estimated range from £21-£64M depending on economic scope included. £21M is 2001 estimate of additional expenditure; £64M is 2004 estimate of total turnover.
[87] Figure is total turnover

References for previous economic impact studies

1 Dubi, 1996; cited in UK Sport, 1998

2 Saskatchewan Parks and Recreation Association

3 Tom Griffin, “Only a Game”, 1997

4 Canadian Sports Tourism Alliance, 2003

5 “The Business of Sport Tourism”, Ross Biddiscombe, Sport Business 2004

6 Chris Gratton, Sports Industry Research Centre, Sheffield Hallam University

7 UK Sport, “Measuring Success 2”

8 “The FA Cup and other Major Football Matches hosted in 2001 at the Millenium Stadium, J Andrews, Cardiff City Council

9 Andy Cook, Sheffield Hallam University, 2004

10 Cogent SI, 2003

11 Cornwall County Council and South West Regional Development Agency, 2004

Appendix 3: Economic Impact studies on Arts and Music events and festivals

Events and Festivals in Ontario, Canada, 2003

A study of events and festivals in Ontario, Canada in 2003 gave economic impact data on a range of event types. The events were typically jazz festivals, wine festivals, and street festivals. The range included some sports events such as dragon boat racing and the Toronto marathon. The scope of the study is not clear – for example it is not known whether promoter's expenditure is included. The study findings were:

- National or international events had an economic impact of between $3 million (£1.4 million) and $60 million (£27.4 million); average economic impact was $22 million (£10 million)
- Regional events averaged $2.7 million (£1.2 million)
- Local / community events averaged $ 400,000 (£18,000)
- Total economic impact of the 25 events studied =$328 million (£150 million)
- Total jobs supported by the 25 events: 10,050

Liverpool 2008 City of Culture

A recent study by ERM Consulting predicts an economic benefit to Liverpool from the City of Culture award as follows:

- £220 million additional tourism impact in the run up to and following 2008
- 1.7 million additional visitors generating additional £50 million each year
- 14,000 – 20,000 additional new jobs in tourism, sport, heritage and creative industries

Cumbria Arts Festivals

- £1.64 million direct expenditure by the festivals
- Further £4 million to £6 million direct visitor expenditure
- Total economic impact £13 million (includes indirect and induced expenditure)

North Yorkshire arts, food, heritage and agricultural festivals

There are 313 festivals annually in North Yorkshire ranging from small village shows to prestigious arts and music festivals and the Great Yorkshire Show. A combined economic impact has been estimated as:

- £20 million in promoter's expenditure
- £100 million in visitor's expenditure

Appendix 4: Evaluating the potential benefits of sports events

The Event Evaluation Tool has been developed by PAWA Consulting for use by *emda* and its partner organisations. If you are an East Midlands based organisation please contact the Sport and Economic Development Manager at *emda*. Contact details are contained in Appendix 14.

If you are based outside the East Midlands, please contact PAWA Consulting:

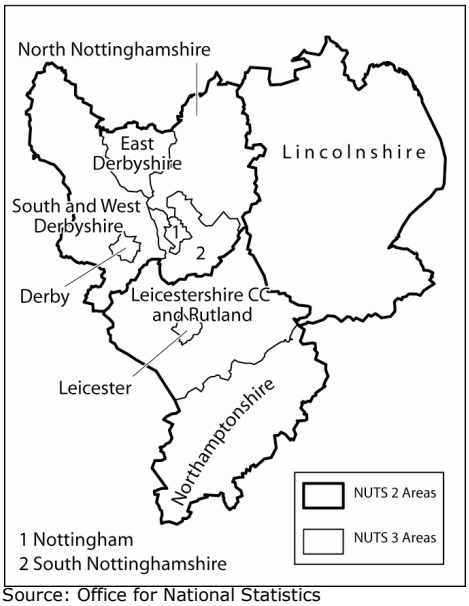
Dr Sara McIntyre
Director, PAWA Consulting
Tel: 01642 712253
E-mail: sara@pawa.demon.co.uk

Appendix 5: DREAM™ impact

The economic model that is used to trace the flow of spending through the economy and work out its implications is called **DREAM™** impact, one of a family of related models. **DREAM™** stands for Detailed Regional Economic Accounting Model and the core of the system is a very detailed snapshot of the local economy. The aim of DREAM™ is to provide for local and regional economies all the economic measures which are usually analysed for the national economy. For illustration, the Nottingham model is described in Appendices 5 - 7.

At the centre of the Nottingham model is a set of economic accounts for the city which exactly matches the format of the national accounts prepared for the UK. In the DREAM™ system as a whole there are 151 such local models which *exactly* add up to the UK national accounts. Each locality is defined in terms of the European geographical classification NUTS3 and NUTS4, so most local authorities and all official regions and sub-regional areas can be picked out. The structure in the East Midlands is shown to the right.

East Midlands: NUTS3 Areas



Source: Office for National Statistics

Derby	UKF11
East Derbyshire	UKF12
South and West Derbyshire	UKF13
Nottingham	UKF14
North Nottinghamshire	UKF15
South Nottinghamshire	UKF16
Leicester	UKF21
Rutland	UKF22
Northamptonshire	UKF23
Lincolnshire	UKF31

The accounts for each locality are themselves very finely detailed. The business economy is described in a 123-industry classification, with every industry having a comprehensive split of its sales by customer type and location, and an equally comprehensive split of its costs including: goods and services purchased; the structure and remuneration of its labour force; taxes paid; profits earned; and capital spend. The public sector and its inputs and outputs are also included in this classification, together with the 'economic' parts of the voluntary sector. Personal incomes are set out, including 'earned' incomes and benefits, pensions, income from shares and property including insurance policies, and money from other sources, including capital gains. From this tax and other deductions are subtracted to give disposable income. Household spending is analysed by both its purpose and the products bought, and other non-business spending – for example by charities (including universities) and government (national and local) is included. In compiling these figures almost every published regional statistical source is used, harmonised always to the 'gold standard' of the national accounts, which are themselves constructed to international

standards put forward by the United Nations and by EU directive. Sometimes the harmonisation will mean that the numbers in DREAM™ differ slightly from the figure originally published: the differences can always be explained exactly and arise from the need for standardisation, comparability and reconciliation.

There are some parts of a local economy covered by very few official statistics, and in these a considerable effort goes in to making estimates which are reasonable, consistent, and match all the evidence that is available. The main such areas concern interactions between localities and regions – people who earn money in one locality and spend it in another, and trade between businesses in different places. There is no need to include these in national accounts, because they cancel out between one part of the nation and another, but they are obviously an important part of local economic measurement.

Use is made of 'gravity models', which have had many applications, from supermarket and school catchment areas to describing the flows of international trade. A gravity model describes the interaction between two places in terms of what goes out from and in to each of the areas, and how great is the distance between them: the further they are apart, the less they will normally interact. The most important factors in these calculations are the amounts originating and absorbed in each place. The gravity coefficients that summarise the effect of distance are estimated separately for trade in every product, and for commuting, shopping trips, tourism and other movements affecting people, using available data on transport and inter-regional trade. Some products like consumer electronics and electronic banking travel easily and may be sourced from anywhere, at home and often abroad, while others, from stone masonry to haircuts, are cheaper or easier to source from near home. The whole picture is made to balance to the national and regional accounts across the whole economy.

How do we use this to estimate economic impact?

We begin with spending. After making sure that what the spenders themselves report is consistent with other evidence (e.g. do visitor purchases match vendors' sales?) we deduct the spending that would have occurred anyway, irrespective of whether the event took place. In the jargon this is called the 'deadweight', and what is left is called 'additional' expenditure.

Expenditure by category is broken down into 123 products, some of which are clear and some are based on the UK Input Output balances. We then deduct from spending the VAT and duties that are paid straight into national coffers and do not touch the local economy. The appropriate rates are applied product-by-product. (A surprising number of economic impact studies miss out these essential prior deductions, and so produce impact figures which are exaggerated and of no use for decision-making or policy purposes). Spending includes all

different types of spending – different types of visitors, the promoters, the competitors and so on. One advantage of a computer model is that it is easy to examine each of these and its implications separately.

The next question is *where* does the spending fall? Much of it may be in local shops, restaurants or hotels, so the proportion going to the proprietor and her or his staff falls on the local economy. However the goods bought are much less likely to be made locally: cigarettes and sandwiches bought by a spectator or electricity purchased by a promoter are quite possibly produced in Nottingham, but whisky, fish or petrol must come from further afield because these products are not produced within the city limits. While there is manufacture of sports goods there is no Nottingham manufacturer of ice skates. In the International Synchronised Skating Nottingham Cup over half of all of the visitor expenditure was made in Nottingham, but the goods bought were not necessarily sourced from Nottingham. However even in cases where the goods were sourced elsewhere, some of the spending impacted locally because the retail margin on these products was 'produced' in Nottingham.

Appendix 5, taken from DREAM™ snapshot presented the total Nottingham production for each of the 123 products, totalling over £10 bn.

For the purposes of analysing Nottingham impacts the 151 DREAM™ territories of the UK are condensed into five areas (Nottingham, Nottinghamshire, Derbyshire, the rest of East Midlands, and the rest of the UK), with the rest of the world split between Europe and elsewhere, making seven areas in all. Each product in each area has its own particular sourcing pattern. DREAM™ tells us a 'normal' geographical pattern of sourcing for each product or service bought, but at this first level the normal pattern may not prevail. One of the main purposes of trader interviews is to define the adjustments that must be made, so that this 'first round' sourcing is accurate and the supply chain work is empirically based..
The calculation of taxes and retail (and wholesale) margins is reasonably precise because it is done separately for each of the 123 products.

Round Two

Once the initial or *direct* impact (Round One) has been calculated product-by-product and place-by-place for all 123 products and seven areas, DREAM™ contains a detailed split of what goes into producing those goods or services. What work is involved, what raw materials and other inputs must be bought, and where do they come from? The make up and the sourcing of these 'Round Two' inputs will depend on where the round one impact falls. And then there is the question of what goes into those Round Two things, and where is it from, and

so on ... The supply chain – or *indirect* impact - is traced in this way, with each round smaller than the previous round.

In fact the supply chain is traced twice. The first time is confined, after round one, strictly to the business-to-business transactions, so it is business-to-business supply chain - this is called a 'Type One' process (initial or *direct* impact, added to the supply chain or *indirect* impact). In the second tracing we also count in spending by the workers involved in the supply chains, and this is called a 'Type Two' process or *induced* impact. The whole supply chain process can be summarised in a 'multiplier'. The multiplier is defined as the sum of spending in all the rounds, including round one, divided by the round one figures. To correspond to the type one (business-to-business) and type two (counting in the workers) views of the supply chain there are 'Type One' and 'Type Two' multipliers.

What* UK Sport *says about other multiplier studies:

"Historically consultants have used highly technical and ambitious multipliers that are not empirically based and are often 'borrowed' from other sectors (e.g. construction) or other economies. This 'borrowed' type of multiplier analysis can be considered only a poor approximation at best and any findings are most likely to be erroneous. Not least because the multiplier is unique to the prevailing economic conditions and this (UK Sport) type of research is about comparing events and not economies…". We completely agree with UK Sport. *Measuring Success 2, Section 5 Methodology*

The DREAM™model has been specifically constructed to take account of the prevailing economic conditions in a locality, in a transparent and auditable way so as to avoid exaggeration, and therefore to enable events in an economy to be compared.

Multipliers

Historically many studies have not calculated the multipliers by taking into account the structure of the local and surrounding economies as described above, but have simply transferred or borrowed numbers from elsewhere. This 'telephone book' method of looking up numbers is inappropriate, because different economies have different structures, and different spending patterns call forth different supply chains. As the quotation from ***UK Sport*** presented in the box recognises, multipliers vary from case to case. It is particularly inappropriate to apply a national multiplier at a local level, or to 'transfer' a multiplier calculated for one economy to an economy with a different structure. And the 'phone book' method is open to abuse, because the temptation is always to find the biggest multiplier. DREAM™ impact is specifically designed to avoid exaggeration and present a consistent view which can

be audited and is consistent at a national level. *UK Sport*'s estimates of impact, produced before the availability of DREAM™, therefore stop short at direct spending. But while *UK Sport*'s research is aimed at comparing events and not economies, the interest for *emda* and its partners is in understanding the impact of sports events not in isolation but in the regional economy. For them the structure of the economy is of the essence, and the structure and performance of local supply chains is crucial within that, and both need to be looked at more deeply than merely expenditure figures.

So far we have discussed the supply chains in terms of expenditure – i.e. of purchases by promoters or visitors and therefore of sales by businesses. However at each stage we can add up the transactions and business activities involved in terms of other variables – we may, for example, be interested in the number of jobs supported, or the Value Added created (GVA), or the employee incomes generated. This is done by applying on a detailed industry-by-industry basis using factors for each industry appropriate to the locality. Multipliers for the employment, output and income figures are usually different from expenditure multipliers. If there is an interest in social priorities and inclusion, or training and skills, then jobs can be broken down, industry-by-industry and place-by-place, into employed and self-employed, full-time and part-time, male and female, or by occupation. For productivity calculations then hours worked or full-time-equivalent jobs can be brought out. If sustainability is an interest, other variables, like CO_2 emissions, waste generation or hydrocarbon content can readily be calculated in a similar detailed way.

Appendix 6: Products made in Nottingham

These tables are taken from DREAM™ snapshot and DREAM™ trade, two of the other models in the DREAM™ family. The table on the right is one of fourteen included in DREAM™ Nottingham and shows the sales of each industry in the city, its value added and the compensation (wages and salaries, national insurance and pension contributions) of employees.

The table below shows a Nottingham-centred view of global trade in meat products. The first column shows that Nottingham meat buyers purchase £70 mn worth of meat per year, of which £4 mn is produced within the city limits, £9 mn comes from elsewhere in the East Midlands (in fact, as more detailed presentations show, mainly Leicestershire) and £43 mn from elsewhere in the UK. £13 mn worth of meat is imported from abroad, most of it from the EU. (The EU/non-EU split is at present only a draft estimate)

Nottingham meat producers sell £4 mn locally, as we have already seen, and 'export' £11mn to the rest of the East Midlands, including some for further processing to Leicestershire. The bulk of their sales, £73 mn, are elsewhere in the UK but there are small overseas exports to bring total sales to £93 mn.

Overall Nottingham has a trade surplus on meat of £23 mn (£93 mn produced less £70 mn consumed).

1 Domestic output at basic prices in 2001

	Industry or product	Total industry output £ million	Principal product as a proportion of total industry output	Total domestic output of products £ million	Principal product as a proportion of total output of product	Industry gross value added at basic prices £ million	Compensation of employees £ million
1	Agriculture	1	93%	1	100%	0	0
2	Forestry	1	70%	1	100%	0	0
3	Fishing	4	94%	4	100%	2	0
4	Coal extraction	0	94%	0	0%	0	0
5	Oil and gas extraction	0	96%	0	0%	0	0
6	Metal ores extraction	0	100%	0	0%		
7	Other mining and quarrying	2	89%	1	94%	1	0
8	Meat processing	92	86%	81	99%	26	24
9	Fish and fruit processing	0	85%	4	6%	0	0
10	Oils and fats	0	71%	0	0%	0	0
11	Dairy products	18	93%	17	98%	4	4
12	Grain milling and starch	0	90%	1	0%	0	0
13	Animal feed	0	87%	0	99%	0	0
14	Bread, biscuits etc	43	87%	42	91%	20	20
15	Sugar	0	90%	0	0%	0	0
16	Confectionery	1	82%	2	39%	0	0
17	Other food products	4	69%	7	47%	2	2
18	Alcoholic beverages	0	92%	0	69%	0	0
19	Soft drinks and mineral waters	10	88%	9	99%	3	1
20	Tobacco products	638	85%	539	100%	383	88
21	Textile fibres	2	89%	2	89%	1	1
22	Textile weaving	1	81%	1	30%	0	0
23	Textile finishing	30	82%	25	98%	14	13
24	Made-up textiles	13	80%	15	73%	6	5
25	Carpets and rugs	0	88%	0	37%	0	0
26	Other textiles	24	72%	19	90%	11	11
27	Knitted goods	11	90%	11	85%	5	5
28	Wearing apparel and fur products	65	89%	60	98%	30	29
29	Leather goods	2	77%	2	91%	1	1
30	Footwear	0	77%	0	0%	0	0
31	Wood and wood products	20	87%	19	90%	8	6
32	Pulp, paper and paperboard	10	92%	12	80%	4	3
33	Paper and paperboard products	52	89%	49	94%	19	18
34	Printing and publishing	193	73%	146	97%	88	77
35	Fuels: coke, refined petroleum & nu	1	94%	2	70%	0	1
36	Industrial gases and dyes	0	74%	1	0%	0	0
37	Inorganic chemicals	0	51%	2	0%	0	0
38	Organic chemicals	22	56%	14	88%	7	4
39	Fertilisers	0	90%	0	0%	0	0
40	Plastics & synthetic resins etc	9	78%	9	74%	3	2
41	Pesticides	0	70%	1	0%	0	0
42	Paints, varnishes, printing ink etc	16	82%	13	96%	7	5
43	Pharmaceuticals	2	65%	3	35%	1	1
44	Soap and toilet preparations	29	77%	23	96%	12	9
45	Other chemical products	5	75%	7	53%	2	2
46	Man-made fibres	1	73%	1	29%	0	0
47	Rubber products	6	82%	6	83%	3	3
48	Plastic products	72	86%	69	90%	30	28
49	Glass and glass products	6	89%	6	90%	3	3
50	Ceramic goods	0	78%	1	56%	0	0
51	Structural clay products	0	93%	0	0%	0	0
52	Cement, lime and plaster	0	80%	0	61%	0	0
53	Articles of concrete, stone etc	7	88%	7	91%	3	2
54	Iron and steel	4	94%	6	64%	1	1
55	Non-ferrous metals	27	87%	23	99%	8	6
56	Metal castings	6	80%	5	90%	3	3
57	Structural metal products	37	89%	37	88%	13	12
58	Metal boilers and radiators	3	84%	3	100%	1	1
59	Metal forging, pressing, etc	44	79%	36	96%	24	26
60	Cutlery, tools etc	3	80%	4	59%	2	1
61	Other metal products	20	74%	19	80%	9	9
62	Mechanical power equipment	10	84%	13	64%	4	3
63	General purpose machinery	31	82%	29	86%	12	11
64	Agricultural machinery	0	78%	0	30%	0	0
65	Machine tools	5	78%	5	83%	2	2
66	Special purpose machinery	26	78%	22	95%	10	9
67	Weapons and ammunition	31	90%	28	99%	10	9
68	Domestic appliances nec	3	89%	4	67%	1	1
69	Office machinery & computers	3	85%	4	75%	2	1
70	Electric motors and generators etc	59	79%	48	97%	23	18
71	Insulated wire and cable	0	72%	1	0%	0	0
72	Electrical equipment nec	17	83%	16	87%	7	5
73	Electronic components	2	79%	3	37%	1	1
74	Transmitters for TV, radio and phon	2	76%	4	40%	1	1
75	Receivers for TV and radio	2	80%	3	62%	1	1
76	Medical and precision instruments	17	83%	16	86%	7	7
77	Motor vehicles	44	88%	42	91%	13	12
78	Shipbuilding and repair	0	94%	0	79%	0	0
79	Other transport equipment	45	91%	42	97%	19	10
80	Aircraft and spacecraft	59	88%	53	98%	25	15
81	Furniture	91	91%	86	97%	36	34
82	Jewellery and related products	1	94%	1	92%	1	0
83	Sports goods and toys	35	78%	28	96%	15	9
84	Miscellaneous manufacturing nec &	13	70%	10	91%	4	3
85	Electricity production and distributio	739	82%	611	99%	188	51
86	Gas distribution	55	86%	118	40%	12	7
87	Water supply	34	86%	29	100%	15	4
88	Construction	547	98%	572	94%	209	121
89	Motor vehicle distribution and repair	121	89%	119	90%	72	60
90	Wholesale distribution	558	97%	645	84%	418	254
91	Retail distribution	523	92%	496	97%	350	171
92	Hotels, catering, pubs etc	289	98%	373	76%	147	105
93	Railway transport	1	98%	1	100%	0	0
94	Other land transport	183	98%	195	92%	113	68
95	Water transport	0	97%	0	99%	0	0
96	Air transport	0	98%	1	0%	0	0
97	Ancillary transport services	90	97%	87	100%	48	33
98	Postal and courier services	58	96%	56	99%	47	38
99	Telecommunications	263	94%	250	99%	190	90
100	Banking and finance	332	95%	314	100%	152	90
101	Insurance and pension funds	87	83%	72	100%	22	17
102	Auxiliary financial services	150	96%	146	99%	63	48
103	Owning and dealing in real estate	70	100%	116	60%	48	16
104	Letting of dwellings	388	100%	413	94%	333	14
105	Estate agent activities	16	94%	15	100%	10	8
106	Renting of machinery etc	33	99%	63	52%	25	20
107	Computer services	274	91%	268	93%	267	142
108	Research and development	14	82%	28	41%	14	8
109	Legal activities	129	99%	129	99%	129	54
110	Accountancy services	98	97%	96	98%	98	48
111	Market research, management cons	35	90%	37	85%	29	17
112	Architectural activities and technical	75	93%	83	84%	69	48
113	Advertising	38	95%	88	41%	32	17
114	Other business services	410	97%	449	88%	317	198
115	Public administration and defence	544	100%	543	100%	293	263
116	Education	551	98%	538	100%	389	370
117	Health and veterinary services	1 192	100%	1 187	100%	431	330
118	Social work activities	163	100%	163	100%	84	74
119	Sewage and sanitary services	23	98%	23	100%	9	9
120	Membership organisations	31	97%	30	100%	31	20
121	Recreational services	132	89%	121	98%	96	64
122	Other service activities	38	98%	37	100%	27	10
123	Private households with employed p	0	99%	0	0%		
124	Financial intermediation services inc					- 90	
	TOTAL	10 341		10 341		5 639	3 473

8 MEAT — Production, processing and preserving of meat and meat products

Nottingham view of global product trade

PRODUCT FLOWS (£mn)	Nottingham	North and South Nottinghamshire	Rest of Notts and Derbs	Rest of East Midlands	Rest of UK	Rest of Europe	Rest of World	Total
Nottingham	4	2	3	6	72	3	1	93
North and South Nottinghamshire	0	1	1	2	30	1	0	37
Rest of Notts and Derbs	3	4	12	12	166	7	3	205
Rest of East Midlands	7	16	17	85	764	34	12	935
Rest of UK	43	94	136	378	8779	427	155	10010
Rest of Europe	10	23	31	97	2351	31173	11908	45594
Rest of World	3	7	9	28	654	11369	182364	194433
Total	71	146	209	607	12817	43014	194443	251307

Normal Sourcing	Nottingham	North and South Nottinghamshire	Rest of Notts and Derbs	Rest of East Midlands	Rest of UK	Rest of Europe	Rest of World	Total
Nottingham	5.7%	1.6%	1.6%	1.0%	0.6%	0.0%	0.0%	0.0%
North and South Nottinghamshire	0.6%	0.8%	0.5%	0.4%	0.2%	0.0%	0.0%	0.0%
Rest of Notts and Derbs	3.6%	2.5%	5.6%	2.0%	1.3%	0.0%	0.0%	0.1%
Rest of East Midlands	10.0%	10.7%	8.3%	13.9%	6.0%	0.1%	0.0%	0.4%
Rest of UK	61.2%	64.2%	64.8%	62.2%	68.5%	1.0%	0.1%	4.0%
Rest of Europe	14.7%	15.6%	14.9%	15.9%	18.3%	72.5%	6.1%	18.1%
Rest of World	4.2%	4.5%	4.3%	4.6%	5.1%	26.4%	93.8%	77.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Appendix7: Industry/Product Group Classifications

A Classification of Input-Output industry/product groups by UK Standard Industrial Classification (1992), NACE Rev 1, and cogentsi global activity group

11 level	Detail 123 level	Industry/product groups	Standard Industrial Classification (1992) Divisions, Groups, Classes	NACE Rev.1 Industrial classifications Divisions A60	Sub-sections A31	Sections A17	A6	cogentsi classification activity abbrevn	global activity group
Agriculture	1	Agriculture, hunting and related service activities	01	01	AA	A	1	AGRI	AFF
	2	Forestry, logging and related service activities	02	02				FRST	FOR
	3	Fishing, operation of fish hatcheries and fish farms; service activities incidental to fishing	05	05	BB	B		FISH	AFF
Mining and quarrying	4	Mining of coal and lignite; extraction of peat	10	10	CA	C		COAL	NRG
	5	Extraction of crude petroleum and natural gas; service activities incidental to oil and gas extraction	11 + 12	11 + 12				MONG	NRG
	6	Mining of metal ores	13	13	CB			MMOR	ENG
	7	Other mining and quarrying	14	14				QARY	BLD
Manufacturing	8	Production, processing and preserving of meat and meat products	15.1	15	DA	D	2	MEAT	AFF
	9	Processing and preserving of fish and fish products; fruit and vegetables	15.2 + 15.3					FFVP	AFF
	10	Vegetable and animal oils and fats	15.4					FATS	AFF
	11	Dairy products	15.5					DAIR	AFF
	12	Grain mill products, starches and starch products	15.6					FLUR	AFF
	13	Prepared animal feeds	15.7					ANFD	AFF
	14	Bread, rusks and biscuits; manufacture of pastry goods and cakes	15.81 + 15.82					BAKE	AFF
	15	Sugar	15.83					SUGR	AFF
	16	Cocoa; chocolate and sugar confectionery	15.84					CONF	AFF
	17	Other food products	15.85 to 15.89					OTFD	AFF
	18	Alcoholic beverages	15.91 to 15.97					ALCO	AFF
	19	Production of mineral waters and soft drinks	15.98					SDRK	AFF
	20	Tobacco products	16	16				TOBC	AFF
	21	Preparation and spinning of textile fibres	17.1	17	DB			SPIN	TEX
	22	Textile weaving	17.2					WEAV	TEX
	23	Finishing of textiles	17.3					TFIN	TEX
	24	Made-up textile articles, except apparel	17.4					TGDS	TEX
	25	Carpets and rugs	17.51					CARP	TEX
	26	Other textiles	17.52 to 17.54					OTXT	TEX
	27	Knitted and crocheted fabrics and articles	17.6 + 17.7					KNIT	TEX
	28	Wearing apparel; dressing and dying of fur	18	18				CLTH	TEX
	29	Tanning and dressing of leather; manufacture of luggage, handbags, saddlery and harness	19.1 + 19.2	19	DC			LEAT	TEX
	30	Footwear	19.3					SHOE	TEX
	31	Wood and wood products, except furniture	20	20	DD			WOOD	FOR
	32	Pulp, paper and paperboard	21.1	21	DE			PPPB	FOR
	33	Articles of paper and paperboard	21.2					ARTP	FOR
	34	Publishing, printing and reproduction of recorded media	22	22				PUBG	CUL
	35	Fuels: Coke, refined petroleum products and nuclear fuel	23	23	DF			FUEL	NRG
	36	Industrial gases, dyes and pigments	24.11 + 24.12	24	DG			GPIG	CHM
	37	Other inorganic basic chemicals	24.13					ICHM	CHM
	38	Other organic basic chemicals	24.14					OCHM	CHM
	39	Fertilisers and nitrogen compounds	24.15					FERT	AFF
	40	Plastics and synthetic rubber in primary forms	24.16 + 24.17					POLY	CHM
	41	Pesticides and other agro-chemical products	24.2					PEST	CHM
	42	Paints, varnishes and similar coatings, printing ink and mastics	24.3					PINK	CHM
	43	Pharmaceuticals, medicinal chemicals and botanical products	24.4					PHRM	HLT
	44	Soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations	24.5					SOAP	CHM
	45	Other chemical products	24.6					MCHM	CHM
	46	Man-made fibres	24.7					MMFS	TEX
	47	Rubber products	25.1	25	DH			RUBR	CHM
	48	Plastic products	25.2					PLAS	CHM
	49	Glass and glass products	26.1	26	DI			GLAS	BLD
	50	Ceramic goods	26.2 + 26.3					CERM	BLD
	51	Bricks, tiles and construction products, baked in clay	26.4					BRIX	BLD
	52	Cement, lime and plaster	26.5					CEMT	BLD
	53	Articles of concrete, plaster and cement; cutting, shaping and finishing of stone; manufacture of other non-r	26.6 to 26.8					CONC	BLD
	54	Basic iron and steel and of ferro-alloys; manufacture of tubes and other first processing of iron and steel	27.1 to 27.3	27	DJ			IRON	ENG
	55	Basic precious and non-ferrous metals	27.4					NFMS	ENG
	56	Casting of metals	27.5					CAST	ENG
	57	Structural metal products	28.1	28				STRC	ENG
	58	Tanks, reservoirs and containers of metal; manufacture of central heating radiators and boilers; manufactur	28.2 + 28.3					HOLW	ENG
	59	Forging, pressing, stamping and roll forming of metal; powder metallurgy; treatment and coating of metals	28.4 + 28.5					FORG	ENG
	60	Cutlery, tools and general hardware	28.6					TOOL	ENG
	61	Other fabricated metal products	28.7					MPRD	ENG
	62	Machinery for the production and use of mechanical power, except aircraft, vehicle and cycle engines	29.1	29	DK			MECH	ENG
	63	Other general purpose machinery	29.2					OGPM	ENG
	64	Agricultural and forestry machinery	29.3					AGFM	ENG
	65	Machine tools	29.4					MTOL	ENG
	66	Other special purpose machinery	29.5					OSPM	ENG
	67	Weapons and ammunition	29.6					WEAP	TTT
	68	Domestic appliances not elsewhere classified	29.7					DOMA	ENG
	69	Office machinery and computers	30	30	DL			COMP	ELC
	70	Electric motors, generators and transformers; manufacture of electricity distribution and control apparatus	31.1 + 31.2	31				EPWR	ELC
	71	Insulated wire and cable	31.3					CABL	ELC
	72	Electrical equipment not elsewhere classified	31.4 to 31.6					MELK	ELC
	73	Electronic valves and tubes and other electronic components	32.1	32				SEMI	ELC
	74	Television and radio transmitters and line for telephony and line telegraphy	32.2					RTRN	ELC
	75	Television and radio receivers, sound or video recording or reproducing apparatus and associated goods	32.3					TVRD	ELC
	76	Medical, precision and optical instruments, watches and clocks	33	33				INST	ELC
	77	Motor vehicles, trailers and semi-trailers	34	34	DM			MVEH	TTT
	78	Building and repairing of ships and boats	35.1	35				SHIP	TTT
	79	Other transport equipment	35.2 + 35.4 + 35.5					OTEQ	TTT
	80	Aircraft and spacecraft	35.3					AERO	TTT
	81	Furniture	36.1	36 + 37	DN			FURN	FOR
	82	Jewellery and related articles; manufacture of musical instruments	36.2 + 36.3					JEWL	ENG
	83	Sports goods, games and toys	36.4 + 36.5					TOYS	CUL
	84	Miscellaneous manufacturing not elsewhere classified; recycling	36.6 + 37					MMAN	ENG
Electricity, gas and water supply	85	Production and distribution of electricity	40.1	40	E	E		ELEC	NRG
	86	Gas; distribution of gaseous fuels through mains; steam and hot water supply	40.2 + 40.3					GASD	NRG
	87	Collection, purification and distribution of water	41	41				WATR	AFF
Construction	88	Construction	45	45	F	F	3	CONS	BLD
Wholesale and retail trade	89	Motor trade: sale, maintenance and repair of motor vehicles, and motor cycles; retail sale of automotive fue	50	50	G	G	4	MTRD	NRG
	90	Wholesale trade and commission trade, except of motor vehicles and motor cycles	51	51				WHOL	DIS
	91	Retail trade, except of motor vehicles and motor cycles; repair of personal and household goods	52	52				RETL	DIS
	92	Hotels and restaurants	55	55	H	H		HOSP	TTT
Transport and communication	93	Transport via railways	60.1	60	I	I		RAIL	TTT
	94	Other land transport; transport via pipelines	60.2 + 60.3					TRAN	TTT
	95	Water transport	61	61				SHPG	TTT
	96	Air Transport	62	62				AIRT	TTT
	97	Supporting and auxiliary transport activities; activities of travel agencies	63	63				TRSP	TTT
	98	Post and courier activities	64.1	64				POST	TTT
	99	Telecommunications	64.2					TLCO	ELC
Financial intermediation	100	Financial intermediation, except insurance and pension funding	65	65	J	J	5	BANK	FIN
	101	Insurance and pension funding, except compulsory social security	66	66				INSN	FIN
	102	Activities auxiliary to financial intermediation	67	67				AAFI	FIN
	103	Real estate activities with own property; letting of own property, except dwellings	70.1 + 70.2(pt)	70	K	K		PROP	BLD
	104	Letting of dwellings, including imputed rent	70.2 (pt)					DWEL	BLD
	105	Real estate activities on a fee or contract basis	70.3					RLES	BLD
	106	Renting of machinery and equipment without operator and of personal and household goods	71	71				RNTL	BPS
	107	Computer and related activities	72	72				CSFT	ELC
	108	Research and development	73	73				RDND	EDN
	109	Legal activities	74.11	74				LEGL	BPS
	110	Accounting, book-keeping and auditing activities; tax consultancy	74.12					ACCS	BPS
	111	Market research and public opinion polling; business and management consultancy activities; management	74.13 to 74.15					CSLT	BPS
	112	Architectural and engineering activities and related technical consultancy; technical testing and analysis	74.2 + 74.3					TCON	BPS
	113	Advertising	74.4					ADVT	BPS
	114	Other business services	74.5 to 74.8					OBUS	BPS
Public administration	115	Public administration and defence; compulsory social security	75	75	L	L	6	PBAD	GOV
Education, health and social work	116	Education	80	80	M	M		EDUC	EDN
	117	Human health and veterinary activities	85.1 + 85.2	85	N	N		HLTH	HLT
	118	Social work activities	85.3					SOCW	HLT
Other services	119	Sewage and refuse disposal, sanitation and similar activities	90	90	O	O		SREF	DIS
	120	Activities of membership organisations not elsewhere classified	91	91				MEMB	DIS
	121	Recreational, cultural and sporting activities	92	92				LEIS	CUL
	122	Other service activities	93	93				OSVC	DIS
	123	Private households with employed persons	95	95	P	P		BUTL	DIS
	124	Financial intermediation services indirectly measured						FISM	FIN

Appendix 8: Glossary

Additional Visitor Expenditure	Total Visitor expenditure *minus* expenditure by residents of the local area (area defined by the study)
Total Direct Expenditure	This is the sum of the additional visitor and the promoter's expenditure in staging the event. The visitors' cost of purchasing tickets is included. This can be quoted over all locations of expenditure, or within a defined geography e.g. the East Midlands.
FTE Full-time equivalent jobs (FTE)	This is the equivalent number of full time jobs supported over a period of 1 year. This includes direct and indirect effects from visitors' and promoters' expenditure, but excludes induced effects.
Indirect Expenditure	Income to other individuals and businesses down the supply chains from those receiving the *direct* expenditure
Induced Expenditure	How the *direct* and *indirect* expenditures above results in wages being paid to individuals which in turn are spent in the economy
Multiplier Analysis	These further effects within the economy are termed 'multiplier' analyses i.e. for an amount spent *directly* there is further *indirect* and *induced* expenditure which 'multiplies' this original amount
Net Additional Visitor Expenditure	Additional Visitor Expenditure that remains within the local area i.e. Additional visitor expenditure minus expenditure that goes directly to bodies/organisations outwith the local area (area defined by the study)
Reported Expenditure	Total expenditure reported by survey respondents without any adjustment/refinement
Total Visitor Expenditure	Gross expenditure reported by survey respondents, adjusted in line with known reporting errors
Type 1 Effects	The *direct* and *indirect* together are termed Type 1 effects, giving rise to a Type 1 multiplier
Type 2 Effects	The *direct, indirect* and *induced* expenditures together are termed Type 2 effects, giving rise to a Type 2 multiplier

Appendix 9: Spas / Hotels in East Midlands

This list is not intended to be comprehensive and is included for illustrative purposes only. At the time of writing this report no comprehensive list is available.

Spas

Champneys, Ashby-de-la-Zouch

Eden Hall, Newark

Aqua-Sauna, Centre Parcs

Whittlesbury Hall, Northamptonshire

Ragdale Hall, Leicestershire

Marriott Hotel: Breadsall Priory, Ilkeston

Springs, Leicestershire

Stapleford Park, Leicestershire

Hotels with Leisure Facilities

Overstone Park Hotel, Golf and Leisure resort, Northampton

Hanover International Hotel and Club, Ashbourne, Derbyshire; Daventry; Hinckley

Hilton Hotels (various)

Holiday Inns (various)

Otium Health and Leisure at the Thistle Hotel, East Midlands Airport

Tattershall Hall – Golf and Country Club, Lincolnshire

Ullesthorpe Court Hotel & Golf Club, Leicestershire

Appendix 10: Golf Resorts in the East Midlands

This list is not intended to be comprehensive and is included for illustrative purposes only. For further information on golf in the East Midlands, please refer to the separate economic impact study published on golf tourism (*emda*, 2005)

Belton Woods	Lincolnshire
Breadsall Priory	Derbyshire
Collingtree Park	Northamptonshire
Farthingstone Golf and Country Club	Northamptonshire
Hellidon Lakes	Northamptonshire
Kenwick Park Golf and Country Club	Lincolnshire
Rufford Park Golf and Country Club	Nottinghamshire
Stapleford Park	Leicestershire
Staverton Park	Northamptonshire
Wind in the Willows	Derbyshire
Woodhall Spa	Lincolnshire

Appendix 11: Main sports conference facilities in the East Midlands

Dedicated Conference Centres

Burleigh Court and Holywell Park, Loughborough University / Imago

East Midlands Conference Centre in Nottingham

Highpoint Conference Centre in Leicester

Marriott Breadsall Priory Hotel & Country Club, near Derby

Rushton Hall in Northamptonshire

Stoke Rochford Hall, Lincolnshire

Venues which host conferences:

Derbyshire

Derbyshire County Cricket Club

Derby Storm Arena

Pride Park

Leicestershire

Brooksby Melton College

Donington Park

Leicestershire County Cricket Club

Leicester Racecourse

Leicester Tigers

Mallory Park

The Walkers Stadium

Lincolnshire

Market Rasen Racecourse

Northamptonshire

Rockingham Triangle Sports Stadium

Silverstone

Nottinghamshire

Nottingham Racecourse & Conference Centre

Nottingham Greyhound Stadium

Nottingham City Ground

National Ice Centre

Nottingham University

Queen's Medical Centre

Nottingham County Cricket Club, Trent Bridge

Appendix 12: Planned / recent sports related conferences

FitPro

Held at Loughborough University between 16th and 18th April, and 17th and 19th of September 2004, this is the UK's largest fitness convention. The conference focuses on motivational, practical and evidence-based research for group fitness professionals. It is sponsored by Reebok, Telstar Fitness, Health & Fitness Magazine and others.

Developing and marketing your sport club in the community

How sport and sports clubs can develop their presence in the community and thus attract more supporters, players and sponsors and raise the profile of the club and their sport. Was held on 8th September 2004 at Leicester Tigers RFU.

Developing and growing sports sponsorship

How sport and business can select and develop the right sponsorships and ensure maximum benefits for both parties. Was held on 9th September 2004 at Leicester Tigers RFU.

RFU Midlands Coaching Conference

The Rugby Football Union is hosted a two-day coaching conference on the 21st and 22nd June at Nottingham University. The conference was open to coaches and teachers at all levels, regardless of experience or qualifications.

Inspire, Innovate and Influence

Organised by the SAQ International and *emda*, 'Inspire, Innovate and Influence' was the 2nd Annual Women's Sport Foundation Conference, and was held on 1st October 2004 at Nottingham Country Cricket Club at Trent Bridge. The one day event included workshops and presentations on topics such as sport psychology, raising visibility and sport and health.
See www.wsf.org.uk/docs/East_Mids_conf_flyer.pdf for more information.

East Midlands Health Psychologists' Group

A one-day conference scheduled for 20th April 2005 at the University of Leicester. Keynote speakers include Prof Stuart Biddle and Mr. Julian. Stuart Biddle will talk about his work in sport & exercise science at Loughborough University. Julian Bath will talk about his consultancy work within the NHS in Gloucester. Members are encouraged to submit abstracts for oral & poster presentations about their work. There will be workshops & discussions around areas of research methodology, consultancy & stage 2 training.

2004 NSport PE and Sport conference

The Northamptonshire Sports Partnership (NSport) PE and Sport Conference was held on 10 March at University College Northampton. The event attracted over 150 delegates and young sports leaders from a range of backgrounds and areas of interest. Of note at the conference was the inclusion of the Youth Leadership Conference (SiS) enabling young people to be showcased and mix with conference members for the first time.

Keynote speakers included Lloyd Conaway, Partnerships & Investment Director at Sport England and Linda Plowright, Chief Executive of the British Sports Trust. The keynote speakers were also accompanied by top sporting personalities such as Sir David Holding MBE, who is a world record holder and a gold medal winner at both the Paralympics and the World Championships.

Midlands Athletics Coaching & Development Speed Conference

Held in Loughborough on 4th April 2004, this conference covered topics such as athlete development and progression, coach development and organisation of speed events at regional levels. It was organised by the Midland Counties Athletics Association.

Sports Coach UK

Sports Coach UK was established in 1983, and is dedicated to guiding the development and implementation of a coaching system, recognised as a world leader, for all coaches at every level in the UK.

The organisation holds numerous coaching conferences and events, throughout the UK. In 2004 these include, in the East Midlands;

- Equity in your coaching: Wellingborough (16th September), Rutland County Council (9th November), Kings Park Tennis Centre (12th November)
- Good practice and child protection: Braunstone (7th September), Northampton (14th October), Lincoln (21st October), Lodge Park Sports Centre (8th November),
- How to coach disabled people in sport: Moulton Sports Centre (20th October)

2004 FA Sports Psychology Conference

The 3rd Annual FA Sports Psychology Conference is this year taking place at Pride Park in Derby on November 4th.

The conference will contain a range of presentations and workshops focussing on the different ways in which managers, coaches and sports psychologists can best work together to teach and deliver appropriate mental skills for the developing player.

Confirmed Speakers Include:

- Gordon Taylor Chief Executive, PFA
- Graham Taylor Former England Manager
- George Burley Manager, Derby County FC
- Dr. Richard Mullen FA Psychology Consultant

Doing the Right Thing – Child Protection Conference 2004

Planned for Pride Park in Derby on November 16th, the conference is aimed at child protection practitioners in football, including tutors, AWOs, CPOs and FDOs and others interested in this issue. Invitations also go out to other governing bodies and key political figures as well as The FA board and council.

The theme is on responsibility – The FA taking the lead in providing clarity and guidance on child protection issues, learning and Criminal Records Bureau checks.

Appendix 13: Promoting the region as a sports tourism destination

Shows and Exhibitions for promoting the region as a sports tourism destination

The marketing and promotional strategy needs to contain many strands relevant to the region and its strengths. These include:

- Work with travel operators for destination place management
- Influence media coverage of events – try to include wider coverage of the locality and prompt commentators with fact sheets
- Work with specialist sport media e.g. golf magazines – host visits to regional courses
- Promote at specialist shows/exhibitions
- Use local celebrities. These act as a magnet - for example many golfers visit Worksop Golf Club and ask "where's Lee Westwood?"

A list of show and exhibitions relevant to promotion of sports tourism is included in the table below. The most promising national events are:

- The Daily Telegraph Adventure Travel Show – 14-16 January 2005
- The Ordnance Survey Outdoors Show – 18-20 March 2005 – this is an event which combines 6 smaller shows in 1 and includes canoeing, climbing, adventure sports and travel
- The Outdoor Sports & Holiday Show – 8-10 April 2005.
- The National Adventure Sports Show – 16-17 July 2005. This is more a showcase of extreme sports than an exhibition or conference.
- Many individual sports have their own shows, including:
- London Golf Show
- Cycle Show – this is currently more for equipment than travel, but the re is the opportunity to link to the Tour of Britain stand at the Show
- Go Fishing
- International Kart Show

UK TRAVEL EVENTS	Location	Date
Business Travel Show	NEC Birmingham	13-14 October 2004
WTM World Travel Market	ExCel, London	8-11 November 2004
Daily Telegraph Adventure Show	Olympia, London	14-16 January 2005
Holiday World, Belfast Telegraph Travel Show	The King's Hall, Belfast	21-23 January 2005
The Travel Technology Show	Olympia, London	1-3 February 2005
Business Travel Exhibition	Olympia, London	1-3 February 2005
British Travel Trade Fair	NEC Birmingham	2-3 March 2005
South West Tourism Fair	Westpoint Exhibition Centre, Exeter	18-19 March 2005
Excursions	Alexandra Palace, London	08-Jan-05
Destination	NEC Birmingham	4-6 March 2005
UK SPORTS EVENTS	**Location**	**Date**
The Ordnance Survey Outdoors Show	NEC Birmingham	18-20 March 2005
The Outdoor Sports & Holiday Show	Earls Court, London	8-10 April 2005
National Adventure Sports Show	Shepton Mallett, Somerset	16-17 July 2005
The Sports Trade Show	Telford International Centre	3-4 October 2004
Cycle Show	ExCel, London	13-16 October 2005
The British Ski & Snowboard Show	NEC Birmingham	8-10 October 2004
Daily Mail Ski & Snowboard Show	Olympia, London	13-17 October 2004
Northern Ski & Snowboard Show	G-Mex Centre, Manchester	16-17 October 2004
Tackle & Guns Trade Show	Stoneleigh, Coventry	24-25 October 2004
Dive Show Ltd	NEC Birmingham	30-31 October 2004
Surf Shop 2004 - Windsurfing & Surfing Show	Westpoint Exhibition Centre, Exeter	7-9 September 2004
International Kart Show	Telford International Centre	4-5 December 2004
Go Fishing	NEC Birmingham	1-3 April 2005
International Leisure Industry Week	NEC Birmingham	21-23 September 2004
London Golf Show	London	April 2005
SELECTED WORLDWIDE EVENTS	**Location**	**Date**
Dublin Holiday World	Ireland	TBC Jan 2005
FITUR	Madrid, Spain	26-30 Jan 2005
BIT Milan	Italy	12-15 Feb 2005
Salon Mondial du Tourisme	Paris, France	Mar-05
ITB Berlin, Germany		11-15 March 2005
Adventures in Travel Expo	Various US venues	Jan-05
Sport Xtreme	Capetown International Conference Centre	28-30 January 2005
Extreme Sports 2004	Samara, Russian Federation	17-20 November 2004

Additional sources of information:

A range of internet-based searches were conducted looking into directories of exhibitions, venue websites, other likely exhibitors and extreme sports themselves. Some of the more useful sites have been listed below.

- UK Trade & Promotion sponsor the official website for the UK Exhibition industry - www.exhibitions.co.uk which has a searchable dataset of exhibitions. This produced a list of travel and sport events, a selection of which is attached for information

- Conference listings websites – www.eventseye.com – which has data on events worldwide – and http://www.expo24-7.com/default.asp have searchable databases of events in a variety of categories

- A leisure and tourism website with events lists – www.leisureopportunities.co.uk

- NEC, Birmingham - http://www.necgroup.co.uk/visitor/whatson - and Olympia - http://www.eco.co.uk – have databases of their current and forthcoming events

- The Sports Tourism International Council hosts some events, but nothing of relevance listed currently - www.sptourism.net. This site also links to a Journal of Sport Tourism published by Taylor & Francis Group which might be of interest. http://taylorandfrancis.metapress.com

- The World Tourism Organization, European region - http://www.world-tourism.org/regional/europe/menu.htm - hosts or promotes seminars and conferences, which might be of interest. For example, in March 2004 there was a WTO Seminar on Destination Marketing for the 21st Century held in Moscow

- By viewing the list of exhibitions that other regions, e.g. VisitLondon were attending - http://www.visitlondon.com/corporate/travel_trade/exhibitions.html - some European events were identified

- Reviewing dedicated extreme sports websites gives additional events but generally competitions. However, involvement or sponsorship of these might be of interest. http://www.extreme.com/events.asp.

Appendix 14: Key Contact Details

The steering group for this study comprised the following key contacts. Please contact them if you have any contribution to make to developing sports tourism in the region.

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