



Planning for the New Normal

The Future of Sport Tourism in Canada

Atlantic Event Summit

October 2021

Welcome Back!



Sport Tourism

“Any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings.”



Sport Tourism Definitions

Term	Definition	Term	Definition
Average Spend	Total direct revenue divided by the total number of customers from a sport event	Local Sport Organizations	The volunteer-led organizations that oversee and deliver programming and competitions for a specific sport
Bid Assessment	The process used to evaluate a potential event prior to the bid process	Multi-Sport Organizations	Local, provincial, or national organizations that award hosting rights for multi-sport events such as Ontario, Canadian, or international Games
Dislocation	The impact of reduced access to facilities or amenities by residents or user groups as a result of hosting an event	National Sport Organizations	National governing bodies for a given sport in Canada
Displacement	The impact to booked business as a result of hosting an event	Provincial Sport Organizations	Provincial Sport/Multi-Sport Organizations (PSO/MSOs) are not-for profit organizations formally recognized by the Ministry of Heritage, Sport, Tourism, and Culture Industries as the governing body of a particular amateur sport in Ontario
Decision Support	The process of gathering information and intelligence in a consistent manner to develop a business case leading to evidence-based decisions on events	Rights Holders	An organization or private company who has an existing event and makes decisions on how and to whom the hosting "rights" are awarded
Event Attraction	The process of promoting and selling Aurora as a host for events within a specific sport or segment to prospective customers	Sport Host Destination	A city or town that has identified sport hosting/sport tourism as a tool to build business, sport, and community
Event Legacy	Long-term positive outcomes from an event including cultural, financial, or physical (such as equipment or infrastructure)	Transfer of Knowledge	A process by which knowledge, ideas, and experience move from one bid or host group to another in the community for shared benefit



Sport Tourism in Canada

- \$7.4 Billion Annual Industry in Canada (2019)
- Grassroots Economic Development Initiative
- Build Business, Build Sport and Build Community
- Recovery Initiative from COVID-19



Value of Sport Tourism in 2019 in Canada



\$7.4 billion
in total spending



\$4.1 billion
spending by
domestic visitors



\$3.3 billion
spending by international
visitors



15.9 million
total visitors (same day,
overnight, USA, international)



14.4 million
domestic trips (9.3 million same
day, 5.1 million overnight)



1.4 million
international visitors
(739,000 USA, 746,000 overseas)

www.sporttourismcanada.com



2019 Sport Tourism Visitor Impact

2019	Volume	Value (\$M)	Spending per Visitor
Canada – Sameday Visitors	9,302,000	\$1,051	\$113.0
Canada – Overnight Visitors	5,133,000	\$3,041	\$592.4
<i>Canada – Total Visitors</i>	<i>14,435,000</i>	<i>\$4,092</i>	<i>\$283.5</i>
U.S. Visitors	739,000	\$897	\$1,213.4
Overseas Visitors	746,000	\$2,374	\$3,180.9
<i>International Visitors</i>	<i>1,486,000</i>	<i>\$3,271</i>	<i>\$2,201.7</i>
Total Sport Tourism	15,920,000	\$7,363	\$462.5



Spending by Province

Province/City	Value of Sport Tourism (\$M)		
	Domestic	International	Total
Canada	\$4,092	\$3,271	\$7,363
Newfoundland	\$135	\$43	\$178
Prince Edward Island	\$119	\$16	\$135
Nova Scotia	\$128	\$53	\$180
• Halifax	\$82	\$40	\$122
New Brunswick	\$117	\$22	\$139



Sport Tourism Canada Covid-19 Recovery Task Force



What Have we Been Doing?



The Problems...

To return to sport event hosting in Canada, host destinations, rights holders, venues and the sport hosting supply chain will require unprecedented levels of **support and access to shared resources**. An **adaptive approach** to event planning and risk mitigation based on the shifting local and provincial circumstances can serve to create a positive event experience for participants and spectators while **rebuilding confidence** to attend events and travel based on any local and provincial restrictions; and

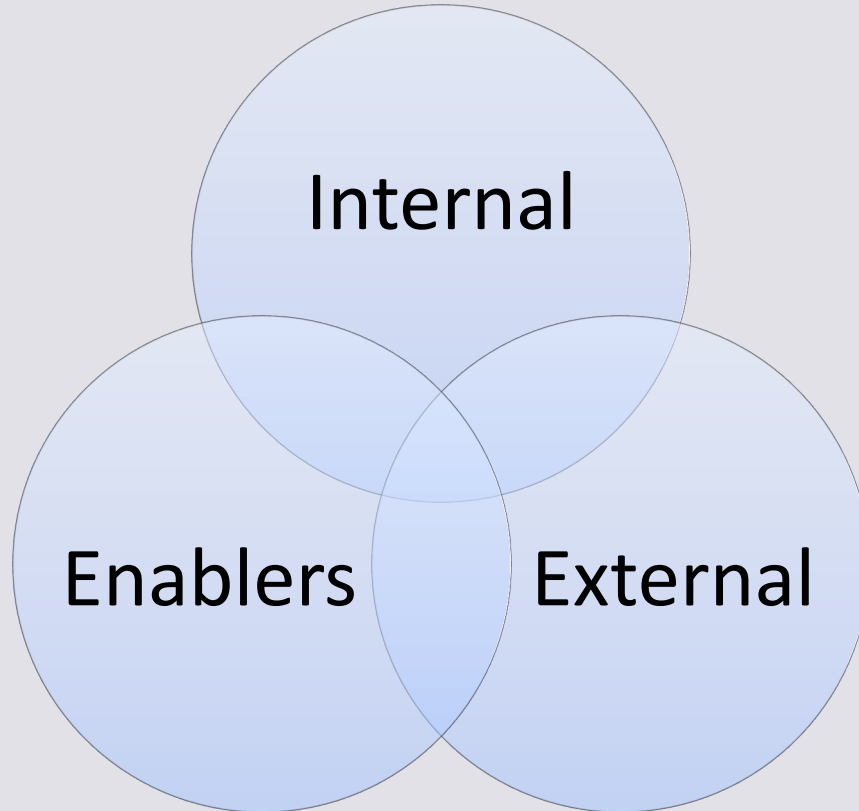


The Problems...

The impacts of sport tourism are not well understood and a more **focused advocacy effort** on the part of Sport Tourism Canada to highlight the importance sport event hosting plays in the economic, social and sustainability **recovery of our communities, our economies, of sport and of Canada** is required.



Who is Sport Tourism?



Who is Sport Tourism?

Internal

- NSO/MSO
- PSO/PMSO
- LOC/HOC
- Accommodations
- Public Venues
- Destination Marketing Orgs
- Municipal Government
- Private Rights Holders
- Event Organizers

External

- Local Sport Organizations
- Economic Development
- Chambers of Commerce/Local Business
- Private Venues
- TIAC
- COC
- Athletes
- Airline
- Ground Transportation
- Food Service
- Event Services
- Sponsors
- Sport and Tourism Media
- Public/Residents

Enablers

- Sport Canada
- Destination Canada
- Provincial Marketing Organizations
- Provincial Governments

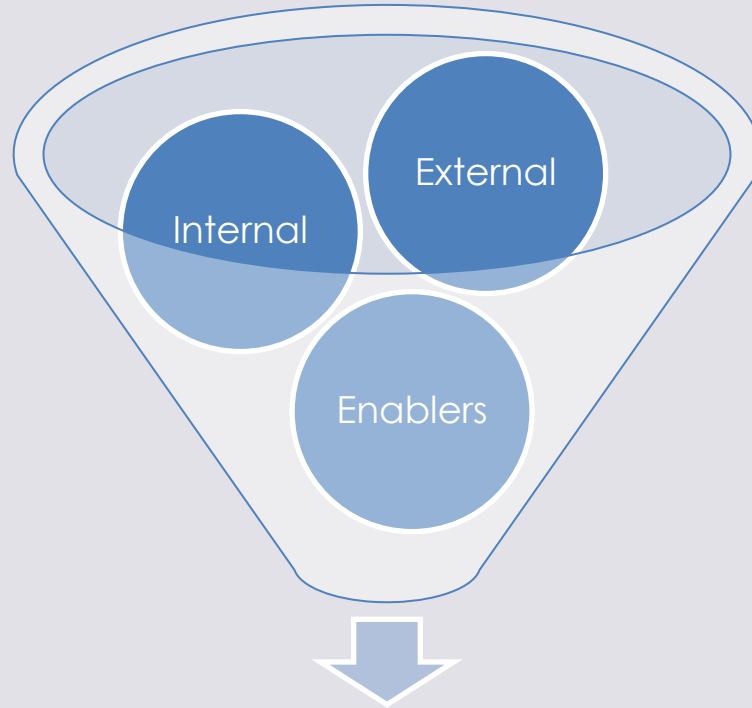


Sport Tourism Canada Advocacy

1. Recognition of Sport Tourism as part of Canada's visitor economy.
2. Funding and Partnerships
3. Increase investment in bidding and hosting for the sport hosting system in Canada.



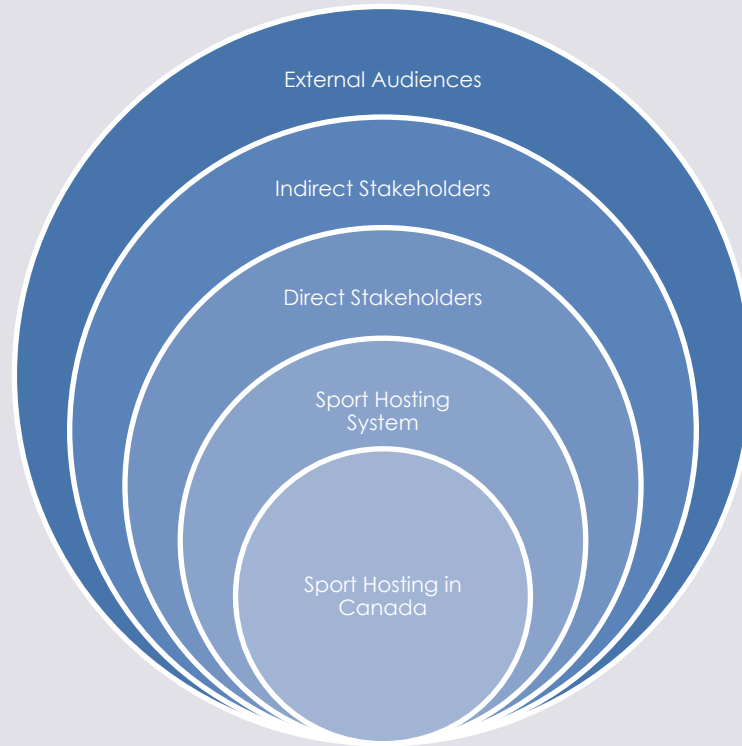
The Shift from Market Segment to Sector



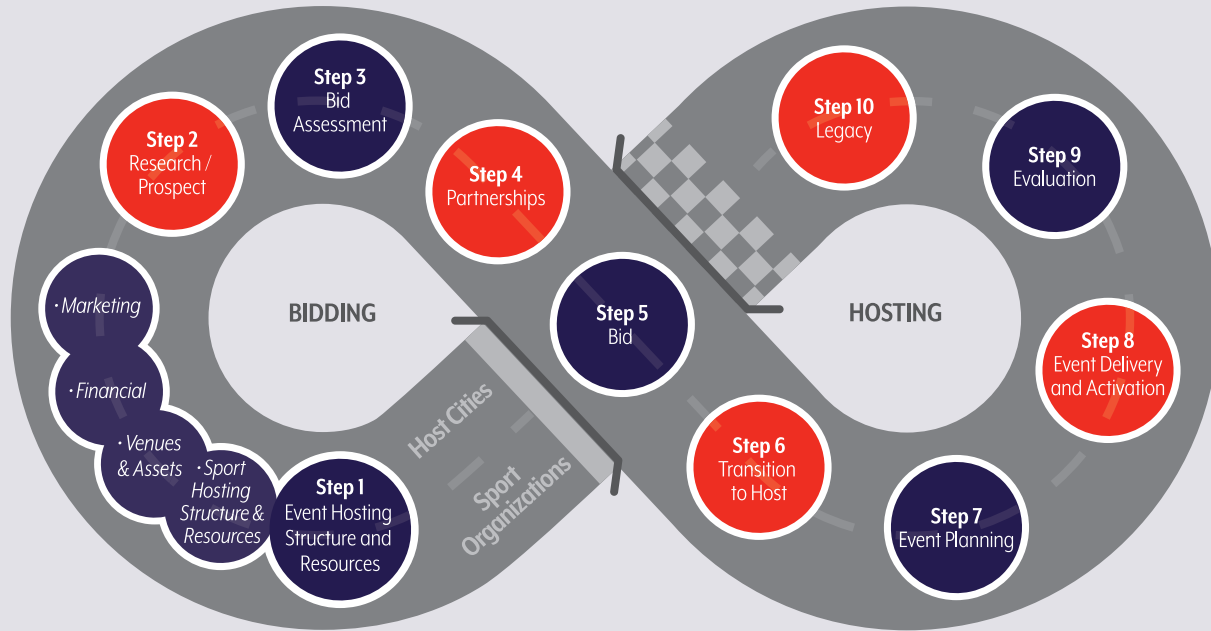
Aligned Sport Hosting System
from Local to National



Sport Hosting Ecosystem in Canada



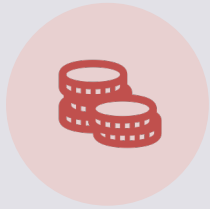
SPORT TOURISM ROADMAP[©]



WHAT'S CHANGED SINCE 2019?



Sports from Triple Bottom



ECONOMIC IMPACT



SUSTAINABILITY IMPACT



International Guidance



THE ASSOCIATION
OF SUMMER OLYMPIC
INTERNATIONAL FEDERATIONS





SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY

2 ZERO HUNGER

3 GOOD HEALTH AND WELL-BEING

4 QUALITY EDUCATION

5 GENDER EQUALITY

6 CLEAN WATER AND SANITATION

7 AFFORDABLE AND CLEAN ENERGY

8 DECENT WORK AND ECONOMIC GROWTH

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE

10 REDUCED INEQUALITIES

11 SUSTAINABLE CITIES AND COMMUNITIES

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

13 CLIMATE ACTION

14 LIFE BELOW WATER

15 LIFE ON LAND

16 PEACE, JUSTICE AND STRONG INSTITUTIONS

17 PARTNERSHIPS FOR THE GOALS

SUSTAINABLE DEVELOPMENT GOALS





SUSTAINABLE DEVELOPMENT GOALS

<p>7 AFFORDABLE AND CLEAN ENERGY</p>	<p>8 DECENT WORK AND ECONOMIC GROWTH</p>	<p>3 GOOD HEALTH AND WELL-BEING</p>	<p>4 QUALITY EDUCATION</p>	<p>5 GENDER EQUALITY</p>	<p>6 CLEAN WATER AND SANITATION</p>
<p>13 CLIMATE ACTION</p>	<p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p>	<p>10 REDUCED INEQUALITIES</p>	<p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>	<p>12 RESPONSIBLE CONSUMPTION AND PRODUCTION</p>	 SUSTAINABLE DEVELOPMENT GOALS
			<p>17 PARTNERSHIPS FOR THE GOALS</p>		



Priority on Change

- Sport Event Hosting as Priority
- Data/Intelligence
- Value of Sport Hosting
- Equity, Diversity and Inclusion
- UN Sustainable Development Goals
- Canada's Active Recovery
- Sports Economy

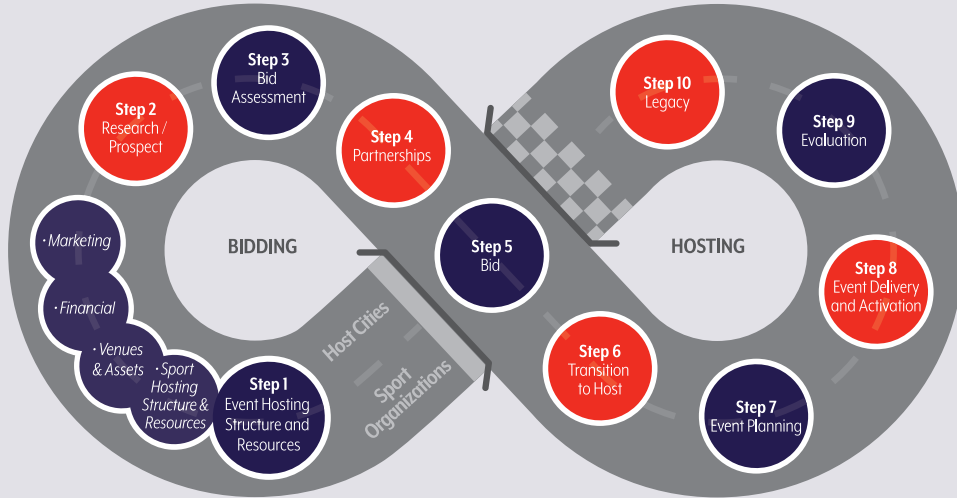


What Can You Do Today?

- Alignment from Local to National
- Be Part of Recovery – Community and Suppliers
- Truth and Reconciliation Calls to Action for Sport (87-91)
- UN Sports for Climate Action Framework
- Data Gathering



SPORT TOURISM ROADMAP[®]

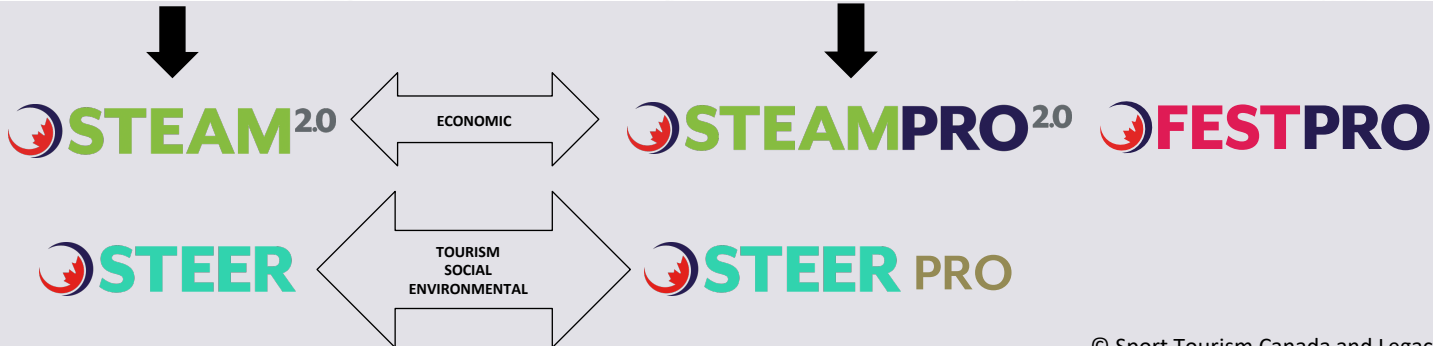
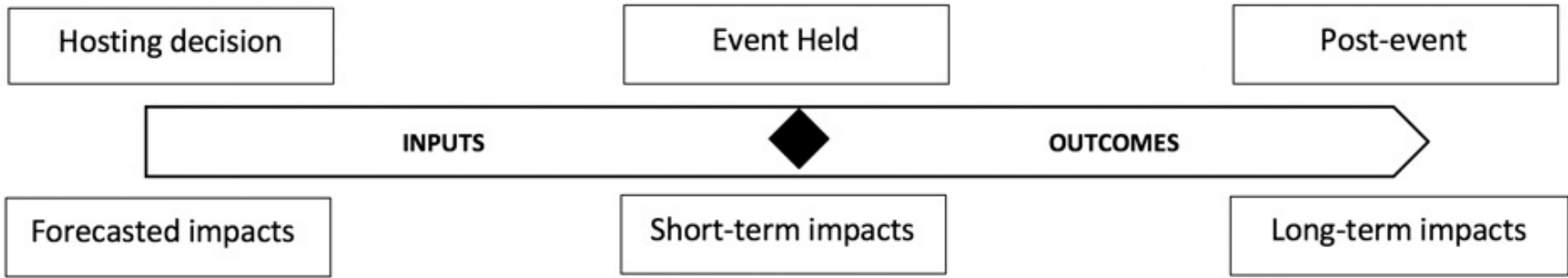


 **STATPRO**



BASED ON INTERNATIONAL GUIDANCE

Timeline of event hosting



Evolution of Sport Tourism

From Hunters



To Connectors

