



Evaluating Resident Sentiment to Inform the Development of Sports Tourism

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Evaluating Resident Sentiment to Inform the Development of Sports Tourism

A white paper*

BACKGROUND

As an industry that created nearly 750,000 jobs and provided over \$100B in economic benefits to communities across the United States in 2019, sports tourism is known for its far-reaching financial impact. However, recent studies (Stoll et al., 2020; Woo, Kim, & Uysal, 2015) have looked beyond traditional metrics to broader (yet harder to measure) benefits such as community pride, resident quality of life, and increased destination brand perception/awareness. As such, the ability to better understand the ever-growing role of sports tourism within local communities is of utmost importance. Sports ETA President and CEO Al Kidd noted “Gauging the sentiment of the local populous toward sports events and tourism efforts in the local community is an important way to ensure an expanded and aligned value proposition back to the destination.”

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Sports Tourism Industry

2019

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2020

- ✓ community pride
- ✓ resident quality of life
- ✓ increased destination brand perception/awareness

Three years ago, Longwoods International pioneered the first research related to resident sentiment towards tourism. Their efforts revealed that evaluating and tracking the impacts and perceptions of local stakeholders allow policymakers to strategically gather support for and meaningfully develop tourism that benefits the community at large. When provided with information and education about the value of sports tourism, constituents are generally more receptive to engaging in fundraising and development initiatives. Simply put, industry professionals benefit tremendously from determining the value residents place on sports events and tourism and the variables that affect overall sentiment.

**This white paper is based on a 2020 study conducted by Longwoods International.*

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Opportunities for State Associations and Sports Commissions

A PATH TO RECOVERY

According to Tourism Economics, sports-related travel (estimated at 180 million people in 2019) was projected to decrease by almost 60% in 2020 due to the pandemic. In addition, wide disparity in guidelines, policies, and protocols is creating difficulty for industry re-opening strategies across the country. Communities across America are now also tasked with retaining jobs and preserving revenue streams by whatever means necessary. As the nation builds back from the economic downturn, the sports events and tourism industry must seek to galvanize strong partner and community relationships in order to return to normalcy as quickly (and safely) as possible.

PURPOSE

Longwoods International's 2020 National Resident Sentiment study sought to obtain public perceptions of sports events and tourism from multiple angles, including: positives and negatives of economic development, environmental impacts, "over-tourism", and quality of life. "What we have learned through our research over the past several years is that Resident Sentiment is a vital insight to fully inform both advocacy and planning for any type of development, including sports," commented Amir Eylon, President and CEO of Longwoods International.

METHODOLOGY

During July 2020, a self-completion survey was completed by 4,000 adults across the four regions (Midwest, Northeast, South, and West) of the United States (1,000 respondents from each region). Survey respondents were asked to identify their level of support when it came to hosting and/or attending, participating in, or watching various types of sporting events (outdoor, youth, amateur, collegiate, and professional). The study also sought to assess respondents' perceptions of event safety during the COVID-19 pandemic.

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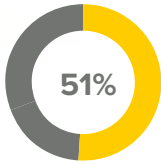


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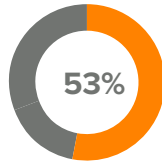
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Summary of Findings

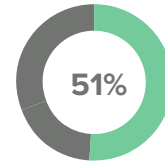
THE STUDY BY LONGWOODS INTERNATIONAL REVEALED:



51% of Americans feel that hosting youth and/or amateur sporting events improves the quality of life in their communities



53% of Americans feel that hosting youth and/or amateur sporting events benefits their local economy



51% of Americans support hosting college and professional sporting events in their communities.

REGIONAL DATA

Regional data showed that residents in the Midwest and South are slightly more amenable to sporting events in their communities, which corresponds with previous research on sports tourism efforts. In 2020, Stoll et al. found that these two regions of the United States were more proactive and engaged in tourism endeavors at a higher rate than other areas of the nation.



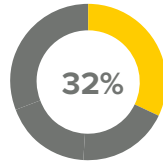
Photo courtesy of Jeffrey F. Lin on Unsplash

GENERATIONAL DATA

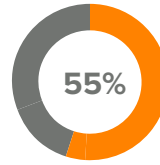
In addition to regional comparisons, the study also noted the generational differences among respondents.



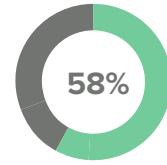
Older Americans were more likely to agree that sporting events had a positive impact on their local economy and quality of life.



Generation Z (ages 18-23): 32% felt that youth and/or amateur events improved their quality of life.



Boomers (ages 56-74): 55% felt that youth and/or amateur events improved their quality of life.

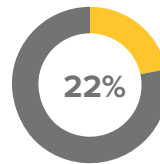


Silent Generation (ages 75+): 58% felt that youth and/or amateur events improved their quality of life.

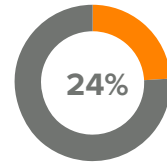
Older Americans were more receptive to hosting sporting events and were more likely to agree that those events had a positive impact on their local economy and quality of life. Generation Z (ages 18-23) emerged as an outlier in several areas. Only 32% of respondents in this age group felt that youth and/or amateur events improved their quality of life (compared to 55% and 58% for Boomers and the Silent Generation). They also indicated a low level of support for hosting collegiate/professional (30%) and outdoor (28%) sporting events. Since many members of Generation Z do not have children, own their own homes, or operate businesses within their communities, it is not surprising that only a third (31%) of respondents in this age group agreed that sporting events positively affected their local economy.

COVID-19 PARTICIPANT AND SPECTATOR SAFETY

Longwoods' also explored the link between sports and COVID-19 in regard to participant and spectator safety. At the time of fielding (July 2020), less than a quarter of Americans indicated that they felt safe attending collegiate/professional sporting events (22%) or amateur youth/adult sporting events (24%). Regional results were very consistent but generational agreement had a wider variance. Respondents over the age of 55 (Boomers and the Silent Generation) did not feel as comfortable going to sporting events as their younger counterparts. Millennials (ages 24-39) emerged by a wide margin as the group that felt the safest attending and participating in sporting events during the pandemic. However, noteworthy is that while safety was a concern at larger events (indoor and outdoor) involving large numbers of people, a much larger number of Americans (43%) felt safe participating in outdoor recreational activities such as hiking, biking, and water sports. Approximately 44% of Millennials, Generation X, Boomers, and the Silent Generation supported such activities, while members of Generation Z felt far less comfortable in the outdoor environment (28%).



Americans that indicated that they felt safe attending collegiate/professional sporting events due to COVID-19



Americans that indicated that they felt safe attending amateur youth/adult sporting events due to COVID-19



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Action Steps

1. HIGHLIGHT QUALITY OF LIFE BENEFITS TO COMMUNITIES

Opportunity exists to highlight aspects of the sports events and tourism industry that differentiates it from many other segments of tourism. Sporting events often contribute to quality of life in a community due to the ability of locale residents to either participate in or spectate at events. In addition, sporting events also deliver a larger public platform through things such as media coverage, corporate partnership, and sponsorship. It is no secret that throughout the COVID-19 pandemic a loss of sense of community has been one of the most difficult realities faced around the country. As restrictions on travel and tourism, and sport, are lifted, leveraging the role these events play in personal and community-driven well-being is paramount. The sports events and tourism industry should be a focal point in bringing communities together through camaraderie, community pride, and even volunteerism.

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2. FOCUS ON EDUCATING “SWING RESIDENTS”

While Americans indicate slight overall support for sporting events (51 to 53% depending on the type of event), the findings of this study reveal that “neutral” respondents represent a significant section of the population. With this neutral status comes the opportunity to educate and inform this group of individuals about the many benefits (economic and otherwise) that sporting events provide to their local communities. The emphasis placed on creating socio-cultural leverage through outcomes such as quality of life, improved health/wellness, and building a stronger community is noted by Stoll et al. (2020) who states “while economic impact is driven by promoting non-local spending in a community, sport tourism entities are often balancing achieving both outcomes” (p. 207). If no effort is made to increase the level of support from the 25-30% of Americans (percentages based on this study) in this “swing” population, the likelihood of generating their support (voting, financial, etc.) for sport tourism-related efforts may decrease.



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3. EMBRACE GENERATION Z

When compared to other generational groups, Generation Z (ages 18-23) was significantly less supportive when asked about attending or participating in sporting events. This group also indicated a lower level of agreement when asked about the economic benefits of sport tourism and how sporting events increased the quality of life in their respective communities. As previously mentioned, these Americans are likely less involved in youth sport since they may not have children participating, are less likely to own a home or business given their age, and may not be as engaged within their communities when compared to older residents. However, they will be an important part of the sports events and tourism conversation in a few years and their support will be needed to fund and develop projects related to the industry. Making this group a priority in the sports events and tourism conversation will go a long way towards creating a population of residents who will shape decisions in their respective communities for years to come.

Additional findings by Longwoods' examining sports sentiment by household composition offered an encouraging outlook. Data show that households with children saw greater value in sporting events and this level increased as their children grew older. However, industry leaders should not just assume that this trend will continue and instead focus on educating and creating participatory opportunities for Generation Z residents to sustainably grow the sports events and tourism industry.

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4. EXPAND OUTDOOR EVENT OFFERINGS

As the COVID-19 pandemic continues to present significant challenges to sports events and tourism destinations and local communities across the country, an effort must be made to diversify event offerings. Traditional sports such as football, basketball, volleyball, baseball, softball, and soccer require more participants and are often held at facilities with limited seating options. As a result, state and local COVID restrictions make it difficult for events to be held safely. This conundrum is clearly identified within the Longwoods' study as the vast majority of respondents noted that they did not feel safe attending or participating in youth, amateur, collegiate, or professional sporting events. However, approximately two in five Americans feel comfortable participating in outdoor recreational activities such as hiking, biking and water sports (an almost 20% increase over other event types).



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Although it is dependent upon location and environmental conditions, communities across the United States have the unique opportunity to create new or expand on existing outdoor events within their communities. Whether it be walking, running or bike trails, canoe/kayak events, golf tournaments, disc golf courses, or other activities that allow participants to be physically active with a greater degree of social distancing, industry practitioners should take advantage of the nation's renewed interest in outdoor recreation. This finding dovetails especially well into industry insights showing the continued growth of destination owned and operated events.

References

Stoll, J. A., Dixon, A. W., Goldsmith, A. L., Andrew, D. P. S., & Chelladurai, P. (2020). Sport tourism entity desired outcomes. *Journal of Sport & Tourism*, 24(3), 195-213.

Woo, E., Kim, H., & Uysal, M. (2015). Life satisfaction and support for tourism development. *Annals of Tourism Research*, 50, 84-97.



Sports ETA

As the only trade association for the sports events and tourism industry, Sports ETA is the most trusted resource for sports commissions, destination marketing organizations (DMOs), and sports event owners. Sports ETA is committed to the success of more than 850 member organizations and 2,400 sports event tourism professionals. Our promise is to deliver quality education, ample networking opportunities and exceptional event management and marketing know-how to our members, and to protect the integrity of the sports events and tourism industry. For more information, visit sportseta.org.

Longwoods International

Established in 1978 as a market research consultancy, Longwoods International has grown into a respected leader within the travel and tourism industry working with over 150 travel brands and destinations. With offices in Toronto, Ohio, Georgia, Florida, and Wisconsin, Longwoods conducts strategic market research for public- and private-sector clients throughout North America, Europe and the Pacific Rim. For more information, visit www.longwoods-intl.com.

