



# Bouncing Back

Preparing for a Sport Hosting  
and Economic Reboot

Part 2: International

June 2021

# Note from Sport Tourism Canada

After a turbulent 2020 that continues into 2021, Sport Tourism Canada has been focused on how sport hosting can return safely and how our segment can play a role in the recovery from the deep impacts of COVID-19. As part of our work, we have been energized by the spirit of collaboration from many industry partners.

In partnership with Destination Canada, we are pleased to present the second in a series of reports that will help to explore and define the challenges facing the recovery of sport tourism. This report, "Bouncing Back: Preparing for a Sport Hosting and Economic Reboot - International" incorporates the input from international sport federations and event rights holders and offers new insights about how some events are back online faster than others.

We sincerely appreciate the support of Destination Canada as well as the input of international sport federations and event rights holders as Canada is committed to once again attracting and hosting world-class events in a COVID-safe and responsible environment.

Sport tourism, which made a \$6.8 billion (CAD) annual contribution to the Canadian economy in the pre-pandemic era, has started to re-emerge in various forms. We hope that this report will help sport tourism in Canada to get on the pathway to a full recovery and even brighter future.

Best Regards,

Rick Traer  
CEO



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# Executive Summary

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Highlights

## Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

In partnership with Destination Canada, Sport Tourism Canada is pleased to present the second in a series of three (3) reports that will help to explore and define the challenges facing the recovery of sport tourism. This report seeks to answer some pivotal questions for the industry:

***How can international sport hosting in Canada return safely?***

***How can sport tourism act as a catalyst for economic recovery and an industry-wide reboot?***



The first case of COVID-19 was identified in Canada in January 2020. By March 11, 2020, a global pandemic was declared, countries started shutting their borders and travellers were grounded. Canada responded simultaneously by cancelling major events, including international and domestic sporting events. One-by-one, provinces postponed events and communities responded quickly to adhere to public health orders, cancelling tournaments and events. With the industry at a “standstill”, private venues and businesses supporting the sport event industry struggled to maintain operations.

By October 2020, some sport event rights holders attempted to return with modified formats, most with varied success. Unlike the majority of domestic events, many international federations had a timeline to keep for Olympic qualification. Destinations, event rights holders, and sport governing bodies worked diligently to bring sport back. Only a handful of the hundreds, if not thousands, of events were successfully executed in 2020 in Canada, while hundreds of tournaments took place successfully in numerous other countries.

Many event rights holders and hosts have struggled to balance their desire to host with the restrictions and guidelines of various levels of government and public health agencies. The ongoing question remains, is the risk versus reward worth it? In our opinion, absolutely, if managed properly.

***“It turns out that the most important way to leverage sports tourism right now has nothing to do with venues and competition... but to leverage the impact of sports tourism to return us to a sense of normalcy.”*** Sport Destination Management, May 2021

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

Sport tourism in Canada is incredibly important to local economies – in urban and rural communities. While most communities across Canada choose to focus on local, regional, and provincial sport leagues and events, international sport event rights holders continue to look for creative ways to engage all communities to allow the region to share in the benefits of sport tourism, the economic impact and the legacy that an international sport event can bring.

Hosts can anticipate a number of economic benefits by hosting international single-sport or multi-sport events of any size, which can include:

- Direct spend in the region
- Increased international travel to the host region
- Stabilized seasonal fluctuations in hotel occupancy
- New job creation
- Development of local businesses
- Increasing local tax revenues
- Urban and rural regeneration and development
- Funding injection for upgrades to local sport facilities

*The average spend per sport tourism visit in Canada is \$301.56.*

*The average spend for a U.S.-based visitor is \$775.26.*

*The average spend of an overseas visitor is **\$2,033.01** per stay.\**

*Sport Tourism Canada & Paradigm Consulting, 2018*

In addition to the economic benefits, international sport event bidding and hosting can have a profound impact on civic pride, improvements in the host country and /or host community's image, and better awareness and exposure of the destination internationally. It is widely understood that any event at the national or international level, no matter how large, has a direct impact on generating awareness about the sport, potential interest in trying it, in addition to creating countless opportunities for athlete, coach and official development and mentorship from the participants of the international event.

***The Case of Ice Hockey in Canada** > It is estimated that the sport of ice hockey has a \$2.6 billion CAD direct economic impact on host communities in Canada, 83% of which can be directly related to sport tourism, the NHL and major events.*

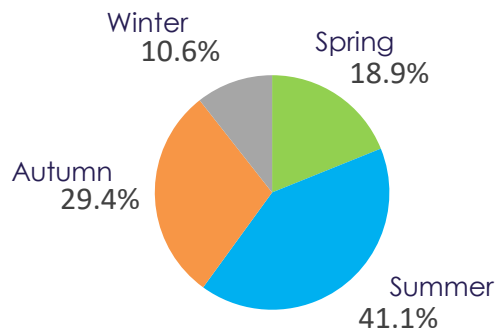
*O'Reilly, 2015*

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

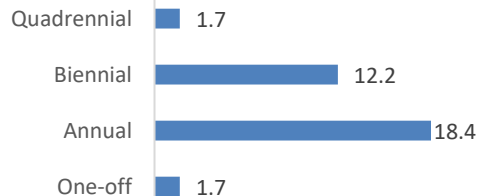
## International Sport Event Rights Holders

Feedback was received from **82** different sports.

Sport event distribution by season



Average # of Events Hosted by Respondents per Year by Type of Event



Respondents highlight that they collectively have selected to host their events in **47** different countries, with Canada, the United States and Australia being the most frequent host countries.



The top ten (10) nations where respondents indicate they have hosted events over the past five (5) include a number of the “sport power houses” internationally. These countries are known to have invested in their sport systems from grassroots through to high performance, but also in the development of and investment in a solid sport hosting infrastructure.

Canada	43.5%
United States	43.5%
Australia	34.8%
France	21.7%
Germany	21.7%
United Kingdom	21.7%
Russia	17.4%
Argentina	13.0%

Brazil	13.0%
Chile	13.0%
China	13.0%
Mexico	13.0%
Serbia	13.0%
Turkey	13.0%
Austria	8.7%
Belarus	8.7%

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## International Sport Event Rights Holders

Many hosts have spent years investing in facilities, building up local sport expertise, and gaining the buy in and support from local, provincial, and national officials and stakeholders to successfully host international sport events. These efforts have not gone unnoticed.

Feedback from the international sport event rights holders highlight that they appreciate a number of things about Canada as a host nation. The top six (6) are listed below.

### What Respondents Appreciate About Hosting in Canada / What Makes Canada a Unique Host (% of Respondents)

Excellent venues	80%
Strong National Federation (NF / NSO) support	80%
Expertise in the sport being hosted	70%
Safe / physical security / low crime rate	70%
Volunteer support	60%
Host partners (e.g., local organizing committee, host cities)	60%

When reviewing the lowest ranked answers on the “what we appreciate about Canada as a host nation” versus the subsequent question about “what are your reasons for not hosting in Canada”, the answers are pretty comparable – it all came down to money.

Surprisingly, **58.3%** of respondents indicate that not a single host city has expressed interest in hosting their events.

### Respondent Reasons for Not Hosting in Canada (% of Respondents)

No host cities have expressed interest	58.3%
Insufficient funding (rights fees, governments, sponsors)	50.0%
Lack of relationship with Canadian hosts	33.3%
Lack of government support	25.0%
Too costly to host	16.7%

This feedback from the international event rights holders is a clear message to any host that a long-term event strategy and deliberate work on financial sustainability of events is central to Canada's future as a host nation.



# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## International Sport Event Rights Holders

Pre-COVID, Canada was ranked #6 globally by SportCal as a sport host nation. Since the pandemic, however, reactions to hosting in Canada has been mixed. Each host city and province has reacted differently to the pandemic, some focusing on keeping citizens safe and cancelling all sport events and others hoping to contribute positively to the local economy by supporting event hosting. This has created added risk and uncertainty for international rights holders about hosting in Canada. But is Canada viewing safety versus international sport event hosting as mutually exclusive? Why can't events be hosted and event participants and Canadians be kept safe?

The feedback from the international federations at the 2021 IF Forum hosted by SportAccord was clear - hosting events safely is possible. Throughout 2020, however, Canada and some international event rights holders felt that the risks of hosting events during the pandemic was not worth it. In 2020, our research showed **22 out of 28** international sport events were cancelled, an additional four (4) were postponed and two (2) events were awarded to other cities, one (1) of which was awarded to another host city outside of Canada.

Event hosting comes with risks, particularly during a pandemic. With the right resources, investment and commitment to operational excellence, sport tourism could see a reboot from international event hosting.

Canadians can feel more comfortable about hosting international sport events knowing the level of investment put into "safe hosting practices". The International Olympic Committee (IOC), International Paralympic Committee (IPC) and the Organizing Committee of the Olympic and Paralympic Games Tokyo 2020 (Tokyo 2020) launched the second editions of the Tokyo 2020 Playbooks in late April. These

Playbooks can act as a model and guidelines for safe international event hosting based on the experience and lessons learned from international sport events hosted during the pandemic.

"Since last year (2020), the international federations have collectively organized over **420 World Cups and World Championships**, with a participation cumulatively of **over 51,000 athletes**. In doing so, [the IFs] have demonstrated that sports competitions can be organized safely, even under current restrictions."

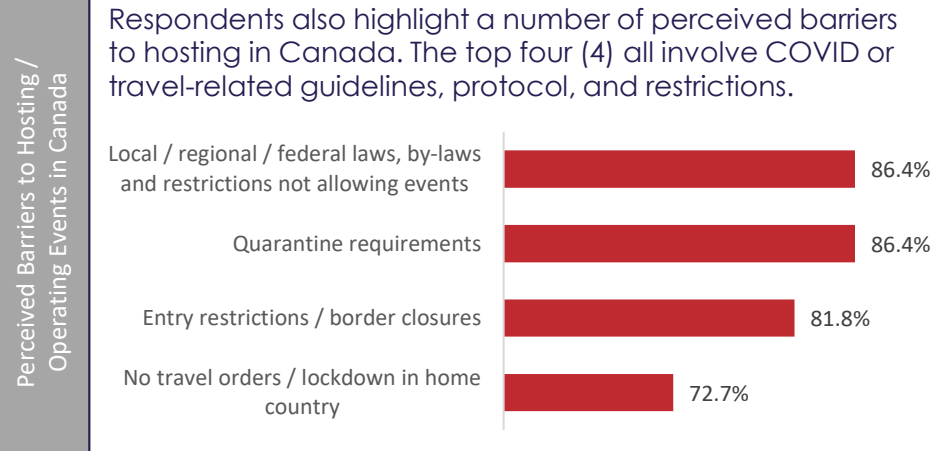
*Thomas Bach, President, International Olympic Committee (IF Forum, May 2021)*

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## International Sport Event Rights Holders

Canada's advantage as a host nation prior to the pandemic was safety, quality of venues, strength of relationships with the national federations, and excellence in operational planning and delivery.

At the time of the survey, the verdict was split among respondents, with **53%** of international event rights holders believing that Canada is "safer than most" relative to COVID-19, while **47%** of respondents saw absolutely no difference from other host nations.



Strict health regulations and government restrictions create barriers to hosting sport events. Similar to domestic rights holders, international event rights holders need clarity on travel, health and operational restrictions to determine Canada's suitability and viability to host. Canada's varying restrictions and opening strategies across provinces and territories make understanding the country's suitability and desirability to host more limited.

On a positive note, suppliers in Canada's sport tourism industry, such as venues, ground transportation / public transit, air access and hotel availability, are cited as low to non-existent barriers to sport hosting in Canada.

"It is absolutely possible to host safe and COVID-free events in our communities. Complete buy-in from all levels of government is critical. Collaboration with all industry suppliers is necessary for flowless execution of an event in a COVID-controlled environment."

*Host Organizing Committee – International Event*

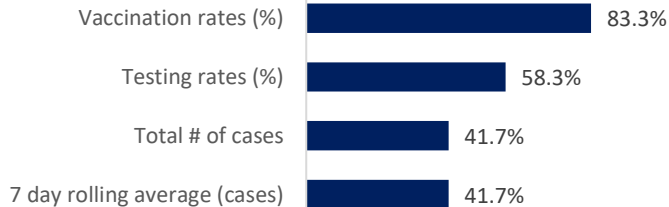
# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## COVID Reporting and Protocol for International Sport Events

Part of executing an event successfully during COVID involves sifting through mountains of data to identify the key facts and figures that can support international sport event rights holders, host nations, and communities in developing COVID protocol, operational guidelines and tactical plans.

Despite international event rights holders stating that they feel confident in delivering an event safely, respondents indicated that they are taking COVID metrics into consideration when assessing a potential host country. In fact, **65%** of international event rights holders stated that they take particular COVID metrics into consideration when assessing a potential host country.

Considering (x)  
Metric as Part of  
their Bid Evaluations



When asked which metric was the single most important metric for consideration, **63.6%** of respondents highlight “vaccination rates (% of population)” as the most important metric for consideration when evaluating a country for sport hosting. And while perhaps not the most important metric for everyone, **3 out of every 4** respondents state vaccination rates would impact the likelihood of a country winning a bid. Vaccination rates will continue to be one of the primary metrics for consideration leading into the rest of 2021 and 2022 for international event hosting.

Despite wide-spread access to COVID-19 Information through global and local media sources, international event rights holders indicate that they rely on the World Health Organization and local public health authorities for “official information” about the status of COVID-19 by country.

Source COVID  
Information by  
Source (Top 3)



# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Bouncing Back

### Who is bouncing back successfully?

An underlying consensus among respondents was that well-financed sports (like professional leagues), individual sports, and outdoor sports are in a better position to implement COVID protocol swiftly and get back to competition sooner. Sports that are part of the Olympic program have successfully run a number of events internationally. Being part of the Olympic program, there is greater urgency to run events, as there is a timeline meet for Tokyo 2020 or Beijing 2022 qualification.



Both survey and interview feedback provided some additional insight about international sport event rightsholder sentiments, namely:

- 1. Remove the Barriers** > *"Despite the pandemic, we have an event to put on. If operationally sound, we will give the event to whichever country removes the barriers to make it happen."*
- 2. Trust the Collective Experience** > *"This is not our first rodeo. We have put on dozens of events over the past year and have developed solid protocol from our learnings. Combined expertise from our international events team and local operations and medical support is key."*
- 3. Government Support or Bust** > *"Events will not be successful during the pandemic without the support of governments at all levels. From international arrivals, to rapid testing and quarantine requirements, to financial support. Everyone needs to be in-step and committed to the seamless delivery of the event. Afterall, the world is watching."*
- 4. Consistency Please** > *"We love hosting in Canada. The most difficult thing to manage presently is the inconsistency in response between provinces and communities across Canada. This creates additional risk for the event and is a deterrent to selecting Canada as a viable host for international events."*

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Bouncing Back

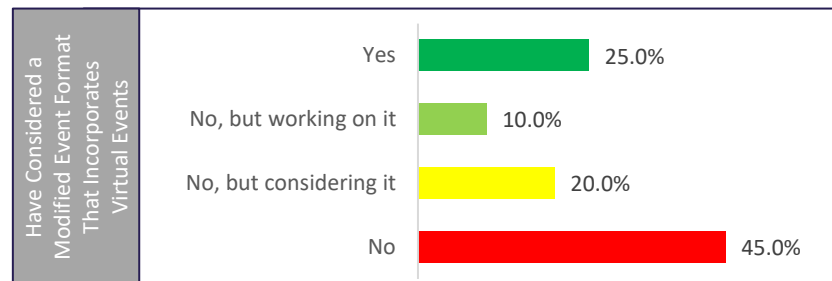
**What else can host cities focus on to get international sport events back sooner?** Given restrictions on sport competitions, international federations have shifted focus to other activities and events, such as:

- Athlete training and evaluation
- International congresses / conferences (virtual)
- Youth sports / grassroots initiatives
- Coach / officials training
- Education initiatives
- Climate / environmental initiatives
- Supporting underprivileged in sport participation

These are great options for Canadian hosts to kickstart their local sport event hosting. These types of events are more flexible (due to less technical requirements for set up and equipment) and are more easily adapted to smaller groups, alternate or virtual event formats, etc.

*“International sport is not all about competition. There is an entire machine in every country around the globe developing athletes from the grassroots through national team. The focus needs to be on supporting all the pieces – including training, evaluation, and programming for athletes, coaches and officials. It is a great springboard for host cities that aren’t quite ready to dive into the limelight and financial risk of a major international event.” Survey Respondent, Summer Sport IF*

Part of the reason why some of the sports or sport events cited by respondents have been successful is because of the creativity of international event rights holders to create new and modify existing event formats, including to virtual events.



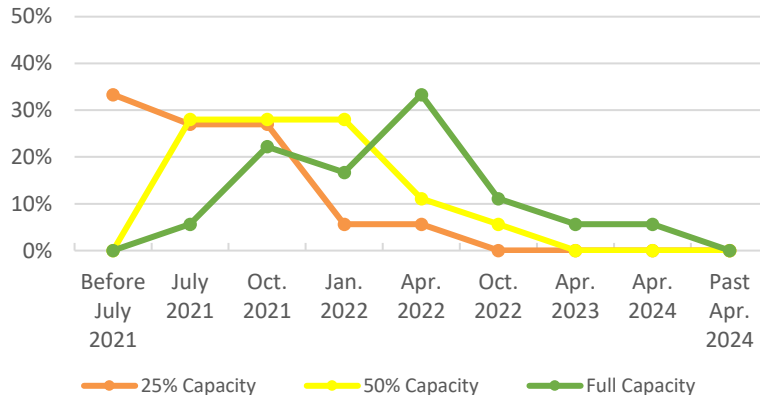
Survey respondents are decisive about **virtual event formats** – the majority were either in or they were out. Only **25%** of respondents highlighted that they have altered the sport event format. Professional leagues are setting a precedent, and sport fans are growing accustomed to consuming sport events via video or interactive online formats. The implications on hosts, while unknown, could be considerable.

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Bouncing Back

### How much longer are we going to be operating like this?

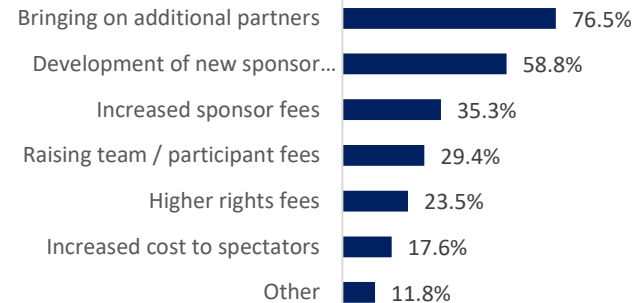
Realistically, no one is certain about when live sport events will restart, and if they restart, will they restart with or without spectators. The United States has demonstrated that live events are back, filling stadiums during NFL, NBA, NHL and NCAA games throughout May. When asked, a little more than **44%** of respondents anticipate live sporting events to return within the **next 9 months** with spectators at full capacity, jumping to **78% within a year**.



For international event rights holders, while hosting events without spectators is not ideal, it is still feasible. Many international sport event host contracts keep broadcasting and major sponsorship rights with the international event rights holder, while ticket sales, merchandise and local sponsorship revenue typically go to the host. During the pandemic, however, without spectators, host revenue potential drops significantly.

When asked about how to cover the increasing costs of events, respondents indicate that partnership / sponsorship programs will be key.

### Covering Increased Costs of Sport Events through (x)



# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Industry Best Practices and Case Studies

In reviewing the COVID-19 protocols and operational guidelines from leagues and events that have successfully been hosted around the world, a number of leading practices were identified relative to COVID-19 protocols. These protocols are highlighted to support local hosts think through creative options to help them bounce back sooner.

Protocols include:

- COVID protocol
- Frequent rapid COVID testing
- Health tracking and monitoring
- Contact tracing
- Facility maintenance and cleaning
- Venue upgrades
- Venue modifications for traffic flow
- Tournament bubbles
- Regional competitions
- Virtual competitions
- Adjusted competition calendars
- Chartered transportation
- Complete hotel “buy outs”

A number of hosts worked to create “event bubbles”, fully isolated event communities where players, coaches and officials could operate the event while remaining in relative isolation from the rest of the world. Event bubbles, while logistically intensive, are greatly impactful on the host community. Three great case studies from Canada come to mind, each with their own unique story and experience, but all declaring that it would be worth doing all over again for the sake of their communities. Additional details are in the full report.

1. **Calgary Curling Bubble – “Hub City”** > Curling Canada hosted seven (7) prestigious curling competitions in a bubble environment at the Markin MacPhail Centre at WinSport's Canada Olympic Park in Calgary, Alberta. The competitions all took place in 2021 from Feb 19 – May 9. Estimated economic impact of \$11 million.
2. **2021 IIHF Junior World Championship – Edmonton and Red Deer** > In September 2021, the IIHF announced that the tournament would be held in a bubble format in Edmonton, after Edmonton and the Oilers Entertainment Group (OEG) had successfully hosted one of two National Hockey League bubbles for the 2020 Stanley Cup playoffs. Estimated economic impact of \$30 million.
3. **Canadian Premier League (Soccer) Bubble PEI – The Island Games** > Professional soccer league based wholly in Canada comprised of eight (8) club teams. Charlottetown, PEI hosted all eight (8) clubs for a 35-match season (league games and playoffs) in August / September 2020. The bubble was successfully executed with zero (0) COVID cases. Estimated economic impact of \$11.75 million.

# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Bouncing Back: The Way Forward

What COVID-19 has taught us this past year and a half is that the playbook for hosting international sport events of any size is no longer applicable and any attempt to re-write a new one is fragmented, incomplete and experimental at best. Rights holders, host organizations, venues and suppliers to events require additional knowledge and capacity to be nimbler and make better, more informed decisions. The hope is that as the knowledge evolves about COVID-19 and the federal / provincial / regional authorities respond, that this research and any subsequent tools and resources will support the sport tourism industry to pivot to adapt and eventually bounce back. Even post-COVID, international sport event hosting will forever be changed.

Every aspect of the sport hosting experience needs to be carefully thought through and meticulously planned in collaboration and in unison with all industry partners in the sport event ecosystem. A successful reboot of the industry demands it.

Sport hosts must adapt and adjust to rebuild visitor confidence and trust in participating in, spectating and / or hosting international sport events. Some of the "go forward" considerations (detailed in the full report) to support hosts fall into the following categories:



**Government**



**Partners**



**Athlete Health & Safety**



**Transportation**



**Accommodations**



**Venues & Operations**



**Fan Engagement**

A few sample questions that hosts and local organizing committees may ask themselves in preparation for a reboot include:

- How can we demonstrate the business case for the event and engage the entire business and sport community to make it successful?
- How can hosting contracts be structured to redistribute revenues to minimize the impact of no ticketing or "in-stadium" revenue?
- How well coordinated are all the moving parts? Can we operate so that teams or athletes remain in their own bubble without risking exposure to other participants or staff?



# Bouncing Back: Preparing for a Sport Hosting and Economic Reboot (Part 2: International)

## Bouncing Back: The Way Forward

Kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

While event adaptations have enabled some events to go ahead, the changes are not financially sustainable long-term. The entire sport event model, at least at the international level, is centred around ticketing, spectators, on-site sales, and sponsor activations. The primary and secondary research from this study, both qualitative and quantitative leads us to believe that the economic bounce back is approaching, but that the sport tourism sector will have to reinvent itself for the long-term creating a “new normal”.

**How do we prepare for successful event hosting in the current COVID environment? What changes can we anticipate when there is a sport hosting restart? How will visitor behaviour have changed for the long-term and how do we proactively prepare for the “new normal”?**

- 1 Safety First** > Host organizing committees and partners must put participant and spectator health and safety first. Developing expertise in venue set up, traffic flow, and COVID contingency plans will be necessary long-term. These standards are expected to become industry norm.
- 2 Focus on Relationships** > Whether hosting an event bubble or developing a sport hosting strategy through 2030, hosts must prioritize relationships in the local community, with all levels of government, and with the national and international sport federations to position themselves for success.
- 3 Rethink Revenues** > With the possibility of limited spectators for some time to come, hosts can move away from the reliance on ticketing and on-site sales to new sponsor asset development, creative brand activations, and monetization of digital content and fan engagement.
- 4 Individual Sport** > Individual sport has proven more easily adaptable to COVID restrictions and protocols. Focusing on individual sport will allow hosts to bounce back sooner and stronger, while also gaining the operational experience to host larger team sport events safely.
- 5 Creative Facility Adaptations** > Facilities will continue to be central to COVID recovery in the short- and long-term. Whether reviewing traffic flow inside the facility or upgrading HVAC, communities nation-wide will be reassessing facility features, safety, and suitability for events. But what about facility development for “rapid repurposing”? From recreational to competitive sport events, to hosting concerts in parking lots, driving maximum usage and ROI is key.
- 6 Fan Engagement Online** > For more than a year, fans have been engaging with their sports teams and favourite events online. From digital content to fantasy leagues, consumer behaviour has been altered by COVID, creating interesting opportunities for new partner agreements and sport delivery.



# Introduction & Background

# Introduction & Background

The coronavirus pandemic caught the entire world off-guard. Emerging from Wuhan in central China in December 2020 as a “mysterious viral pneumonia of unknown origin” (BBC, January 9, 2020), the coronavirus has spread globally and now affects nearly every country on Earth. While novel coronaviruses are not new (e.g., SARS), never have we seen countries and cities mobilize so quickly to shut down, restrict travel and contain any further outbreak, especially for this duration of time.

By the end of January 2020, there were 100 recorded deaths associated with COVID-19 in total and the virus had been detected in at least 16 countries. Only a week later, more than 100 people had died in a single day. Alarm bells were sounding, and global officials were on alert. Unaware of its varying and potentially fatal effects on people of all ages, governments around the world attempted to monitor and assess, with the occasional public health measure or intervention to help curb infection rates. On March 11, 2020, it became clear that efforts globally had failed – coronavirus had become a global pandemic.

Travel and tourism was hit hard. As hospitals filled up, governments began taking more extreme measures, closing borders and implementing lockdown measures for citizens, preventing or at least curbing inter-regional domestic travel. Traveller confidence plummeted and the world came to a veritable standstill.

Based on the advice of public health experts, public gatherings such as sport events were quickly cancelled across Canada, with numerous countries globally also making similar decisions. International travel all but shut down and the movement of citizens across borders was significantly reduced and, in some cases, borders were closed completely. The result was a “freeze” or postponement of all sport events at every level – local through international. Sport event hosts and sport governing bodies nationally and internationally scrambled to make sense of event cancellations, postponements and the risks associated with hosting and travelling to international sport events. Venues closed and businesses supporting the event industry struggled to maintain operations. The sport tourism economy came to a complete standstill.



# Introduction & Background (cont'd)

By October 2020, while some sport activity attempted to return with modified formats, there was no definitive timeline or process for "return to sport" or "return to competition" with spectators. National Sport Organizations, National Olympic Committees, International Federations, the International Olympic Committee, and even the World Health Organization combined forces to create special taskforces to assess the risks of travelling to and competing in international sport events and search for potential solutions to help keep sport online, particularly during an Olympic qualifying year.

In December 2020, the United Nations World Tourism Organization (UNWTO) estimated that tourism declined more than 70% over the course of 2020, taking the industry back to levels from 30 years ago (UNWTO, December 2020). The industry attempted a number of restarts, many of which were unsuccessful. Public health orders were inconsistent, traveller sentiment varied by region, and no one seemed to have a clear playbook for "what comes next".

Hosting international sport events without spectators seemed to be one of the most logical ways to get international sport events operating again. Numerous professional leagues and international sports had competitions without spectators. The risks of COVID-19 remained clear, and effort and attention shifted to event operations and seeking ways to minimize exposure. These types of operational changes, however, require significant support, financial investment and buy-in from everyone involved with sport hosting and event operations. Implementing these measures while constantly adapting them with the release of new information and / or public health orders became a reality for international sport events. A collaborative, purposeful and demonstrably effective approach would be required to encourage hosts, venues, event organizers and participants to engage in sport events.

After more than a year of shutdown and no confirmed restart date in sight (not consistently across the country anyway), the industry can no longer afford to wait. Stakeholders are working together to come up with innovative solutions to help the industry pivot and adapt in response to improvements of immunization rates, spread of the new coronavirus variants, and inconsistent public policy. This study is an important piece of the puzzle, helping correlate international sport event hosting, consumer sentiment, international travel guidelines and restrictions, while keeping case numbers, vaccination rates, lessons learned and leading practices in full view.



# Introduction & Background (cont'd)

Sport events at the local, provincial, territorial, national and international levels have been disrupted since March 2020, due to COVID-19. Despite a trend towards reduced case numbers in many countries and the vaccination rates going up globally, the emergence of more contagious and deadly variants of the virus continue to create discomfort among hosts and host communities about staging international sport events. At present, there is no clear timing for the full return of international sport events and the associated domestic and / or international visitors that drive this important export segment of the visitor economy.

Sport Tourism Canada established the COVID-19 Sport Tourism Recovery Task Force in May 2020 under the tagline "Bouncing Back". The Task Force was representative of national and multi-sport organizations, host cities and destination marketing organizations, host venues, accommodation partners, industry leaders, and those who are engaged in the development of bidding and hosting strategy, planning and delivery of major sport events in Canada.

The Task Force was mandated to explore two primary challenges facing the industry:

1. 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 to support recovery efforts. An adaptable approach to event planning and risk mitigation in response to everchanging local and provincial circumstances can serve to create a positive event experience for participants, officials and spectators, while rebuilding the confidence of all Canadians to attend sport events permitted within local and provincial guidelines; and
2. The impact of the disruption to the Canadian sport tourism industry due to COVID-19 is not well understood. A more focused research and advocacy effort on the part of Sport Tourism Canada aims to highlight the importance sport event hosting plays in sustainable economic and social recovery of our communities across Canada.

This study (Part 2 of 3) is Sport Tourism Canada's contribution to helping the industry bounce back sooner and stronger.



# Introduction & Background (cont'd)

Over the mid- to long-term, sport tourism can be reimagined to not only withstand the impacts of COVID-19, but ultimately adapt, rebound and thrive in a post-pandemic environment. Sport hosting has always been a key revenue generator for sport organizations and host communities across Canada, engendering economic activity in several key sectors such as accommodations, restaurants, retail, attractions and transportation.

Over the past year, the impacts of the pandemic on the Canadian sport tourism industry have not been thoroughly explored. Sport tourism is a relatively new segment of the tourism industry, having been formalized in Canada with the establishment of Sport Tourism Canada (formerly Canadian Sport Tourism Alliance) in 2000. Since that time, sport tourism has been recognized as a key contributor to economic recovery, particularly in travel and tourism following major global events and crises. From 9/11 to SARS, sport events have helped to sustain travel and tourism and to instill confidence in an adapted “new normal”.

In the case of COVID-19, sport tourism is poised to help reboot local economies across Canada – during- and post-pandemic. Participating in or attending sporting events is part of the fabric of this nation, and provided we can create safe event experiences, sport events will be central to restoring confidence in travel and tourism. We all have a role to play in safely re-engaging in sport events, as sport and recreation are central to the health and well-being of our families and our communities.

Sport tourism has traditionally been under-funded, under-leveraged, and in some cases, taken for granted for the contributions to local economies, community well-being, civic pride, investment in local infrastructure, and local sport development. A clear opportunity exists to tell the sport tourism story more proactively and consistently to ensure the segment continues to contribute to the recovery of sport, communities, and economies of all sizes across Canada and grow sustainably for years to come. Other countries are enjoying an economic reboot as a result of hosting international sport events. It is time for Canada and each of the provinces and host cities to develop the confidence and a roadmap to host international sport events successfully and kick start the economic reboot locally.





# Project Overview & Objectives

**This project is designed to provide meaningful insights that are actionable at all levels of the sport event ecosystem in Canada, so that as an industry and as a nation we may rebound faster.**

**The three major objectives for this project are:**

1. Provide meaningful, actionable insights into the current state of sport hosting and sport tourism in Canada specific to international sport events.
2. Enable the return of international sport event hosting and to restart local economies through sport tourism.
3. Provide information and insights that will restore the confidence of participants, officials, spectators and communities in sport event hosting (including attending and travelling to sport events), by drawing on leading practices and industry case studies from around the world.





## “Part 2: International” focused on stakeholder groups and leading industry practices specific to international sport event hosting.

**This research study is divided into three distinct activities and sets of reports:**

1. Sport hosting for domestic events / audiences > Research and insights focused on local, regional, and national sport events.
2. Sport hosting for international events / audiences > Research and insights focused on international sport events.
3. Consumer sentiment regarding sport event hosting during- and post-pandemic.

**During this second phase “Sport Hosting for International Events / Audiences”, research was conducted as follows:**

- Primary research through interviews with key industry stakeholders, including international sport federations and international sport event rights holders.
- Primary research through an online survey deployed in both English and French to the entire Sport Tourism Canada database, partner network, and through direct LinkedIn call outs to industry contacts. The survey was available to anyone with the link (available publicly through online and social media campaigns).
- Secondary research through review of current media posts, journal articles and research publications.

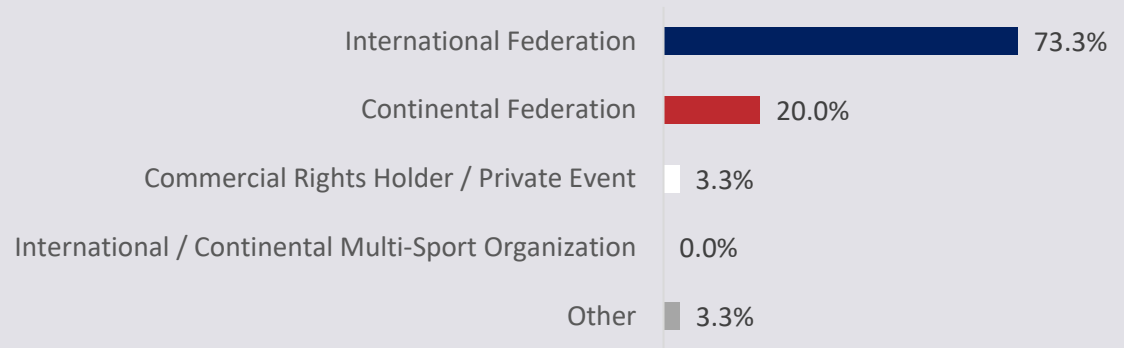


**This portion of the study (Part 2: International) is an important snapshot of the international sport event market, including leading practices and insights from both hosts and event rights holders.**

**The segment groups targeted for this project:**

- 1. International Sport Federations**
- 2. Continental Sport Federations**
- 3. International Event Rights Holders**  
(i.e., non-federation)

**Respondent Breakdown**





# International Sport Hosting

Why is it important to Canada?

# Sport Tourism in Canada

Sport tourism is defined by Sport Tourism Canada as “any activity in which people are attracted to a particular location as a sport event participant, coach, official, or event spectator, or are attending sport attractions or business meetings.” This definition can be further enhanced with the addition of sport development clinics (e.g., player, coach, volunteer, or official), as well as training and evaluation camps. All of these sport-related events attract visitors.

Sport tourism in Canada is a \$6.8 billion (CAD) annual industry and, at its core, is a grassroots economic development initiative. Beyond the economics, sport tourism and the staging of sport events can also support the social and sustainability impacts that can be delivered in a community.

The spending profile of the sport tourism visitor in Canada is significant, with an average spend per Canadian visitor of \$145.09

for same day visitors and \$546.56 for overnight visitors. The average spend per sport tourism visit in Canada is \$301.56. The average spend for a U.S.-based visitor is \$775.26, while overseas visitors spend an average of \$2,033.01 per stay. (Paradigm Consulting Group / Sport Tourism Canada, 2018). Active participants in the sport event (e.g., competitors, coaches, officials) and passive participants in the event (e.g., spectators) bring significant tourism spend to a host destination and region pre-, during- and post-event.

The average spend per sport tourism visit in Canada is \$301.56. The average spend for a U.S.-based visitor is \$775.26, while **the average spend of an overseas visitor is \$2,033.01 per stay.\***

Many hosts have spent years investing in facilities, building up local sport expertise, and gaining the buy in and support from local and provincial officials and stakeholder groups in order to successfully host international sport events. Getting international sport events back online is an important piece of this nation's economic recovery.

\* The statistics and spending data cited on this page were prepared by Paradigm Consulting Group for Sport Tourism Canada:  
Statistics Canada 2018 *National Travel Survey* (public-use microdata file)  
Statistics Canada 2018 *Visitor Travel Survey*  
Statistics Canada 2018 *International Transactions in Services*



# The Impact of International Sport Events on Canadian Society

The positive effects of sport hosting on a community are numerous. The Government of Canada recognizes that there are “sport development, social, cultural, economic and community benefits derived from hosting sport events”, so much so, that the hosting program provides approximately \$21.6 million in financial support to national and international sport event hosts annually (Government of Canada, 2021).

International sport event hosting is key to any region's sport tourism strategy. It is estimated that the sport of ice hockey, for example, has a \$2.6 billion direct economic impact on host communities in Canada, 83% of which can be directly related to tourism or the NHL clubs and major events (O'Reilly, 2015). Hosts can anticipate a number of economic benefits by hosting international single-sport or multi-sport events of any size, including increased growth of international travel to the host region, stabilized seasonal fluctuations in hotel occupancy, new job creation, development of local businesses, and increasing local tax revenues (as a result of visitor and sport event host spend). Sport event hosting can also be leveraged to further urban and rural regeneration and development.

International sport event bidding and hosting can have a profound impact on civic pride, improvements in the host country and /or host community's image, and better awareness and exposure of the destination internationally (Arnegger & Herz, 2016).

The long-term “legacy” benefits of international sport event hosting include enhanced sport hosting partner networks, increased community collaboration and levels of volunteerism, enhanced knowledge and expertise for local sport participants, officials and volunteers, greater sport development opportunities for the community, and improvements to local recreation infrastructure and facilities (Stacy-Lynn Sant, Laura Misener & Daniel S. Mason (2020).



# Sport Tourism Stakeholder Profile for International Sport Events

Key stakeholder groups for international sport events make direct decisions influence the location of sport and sport business events that define a host city's success. That includes, but is not limited to:

## 1) Event Rights Holders

- National, international and multi-sport organizations that conduct competitions and championships;
- Private event rights holders who own existing event properties or have the capacity to create new events; and,
- Professional sport, including major and minor professional leagues and teams.

## 2) Sport Governing Bodies

- International and / or Continental Federations (IFs) for the sport(s) being hosted in Canada; and,
- National sport organizations (NSO) and provincial and territorial sport organizations for the sport(s) being hosted in Canada.

## 3) Regional, Provincial, Territorial, and Federal Governments and Agencies

- Sport Canada, the Canadian Olympic Committee, Own the Podium;
- Public Health Agency of Canada, and provincial, territorial, and regional health authorities; and,
- Other government ministries and agencies.

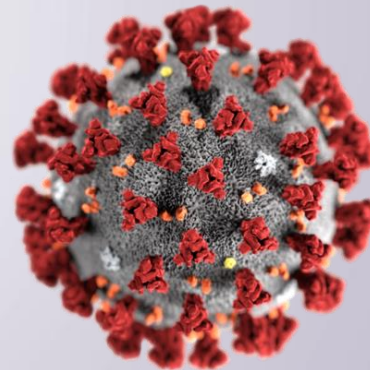
## 4) Host or Local Organizing Committee (HOC or LOC)

- Local organizers, either for-profit or not-for-profit, who plan and deliver the sport event(s).

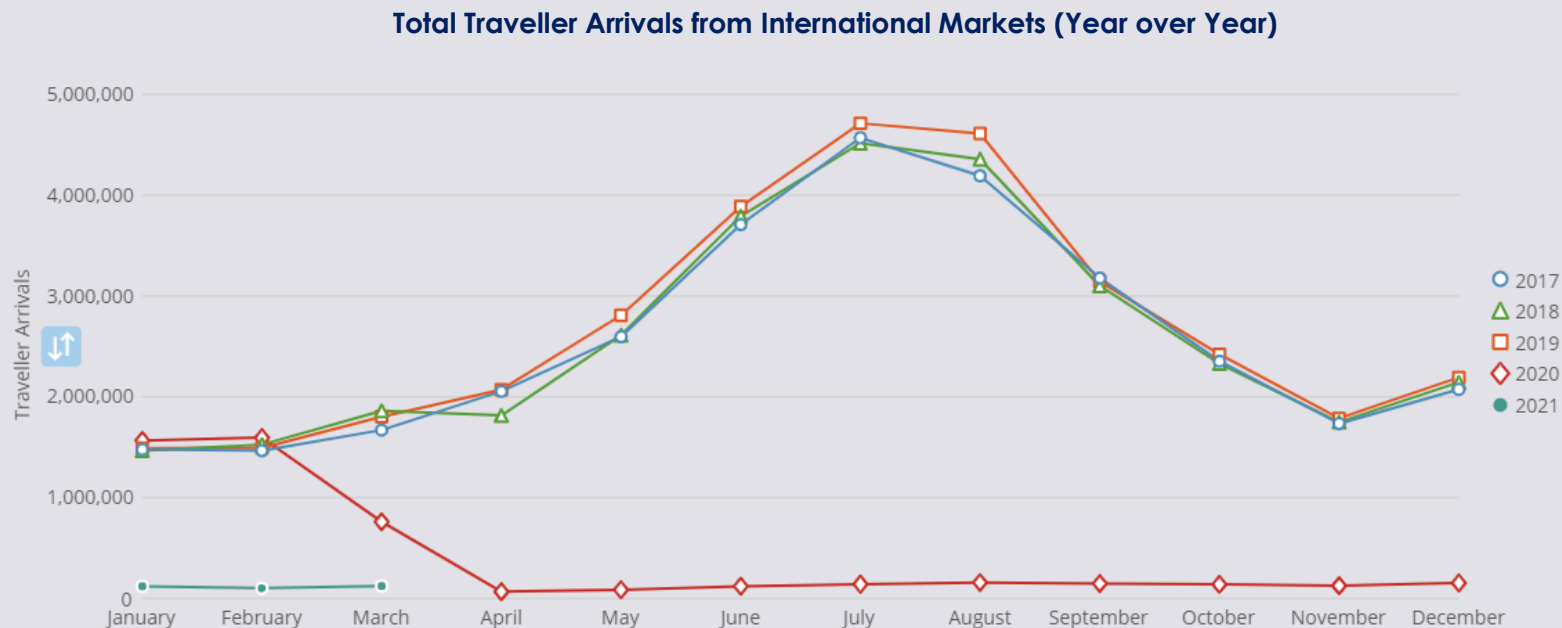


# COVID-19

## Impact & Timeline



# Canada has experienced an extreme drop in international arrivals due to border closures and travel restrictions.



Data provided by: Destination Canada (May 2021)

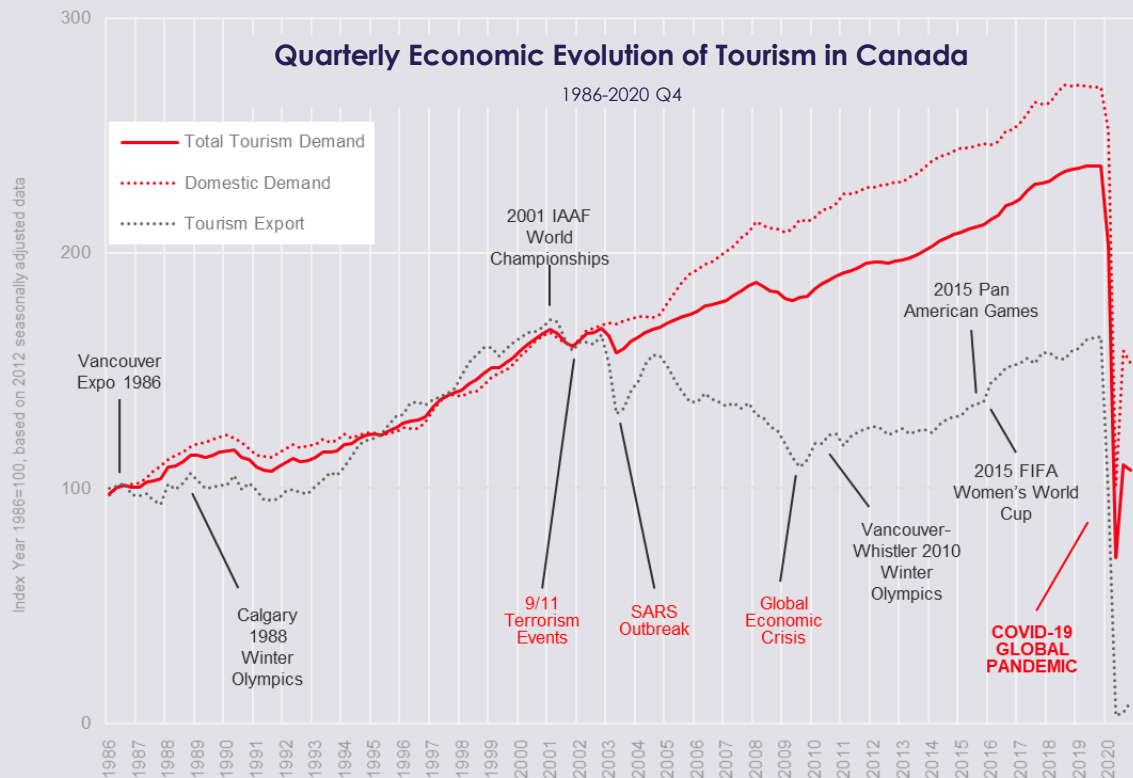
Sources: Statistics Canada – Frontier Counts



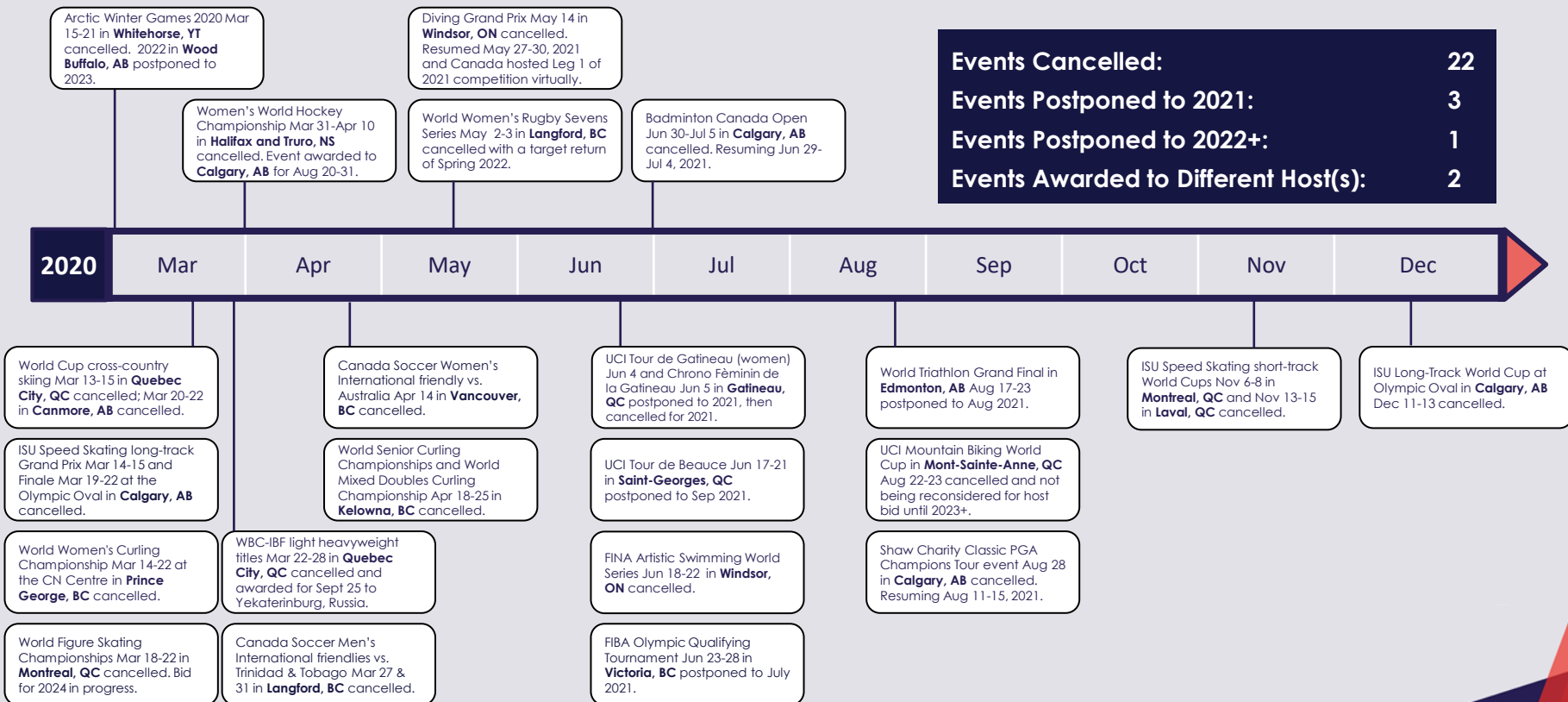


# The impact on Canada's tourism sector has been catastrophic, with tourism levels returning to those of the early 1980s.

"The demand for tourism activities has been greatly affected by the travel restrictions and limitations. In March 2020, the number of international travellers **fell by 54.2%** from February 2020, the largest single monthly drop since 1972" (Statistics Canada, 2020).



# Dozens of major international sport events were cancelled commencing in March 2020, many still unconfirmed for future.



# The economic losses in 2020 as a result of delays and cancellations in Canada is in the billions.

In 2020 alone, this study highlighted 28 international events, all of which were cancelled, postponed or re-awarded to different host cities. Accurately accounting for the economic impact across the country for all sport event cancellations would be a mammoth undertaking, but based on both the domestic and international survey results, we can estimate that if the sport tourism sector accounts for \$6.8 billion in tourism spend and 80%+ events were cancelled, that we as a nation suffered an economic loss of over \$5.4 billion this past year due to COVID-19.

As an example, the following event cancellations / alterations should leave little doubt about the economic impact of COVID-19 in Canada and around the world:

**Formula One** > F1 had 22 grand prix races scheduled for the 2020 season. Of the 22 races, 15 were cancelled, including the Canadian Grand Prix in Montreal. Formula One estimates that they lost over \$602 million USD from cancelled races. Formula One Group (publicly traded on the stock market) lost 45% of its value in 2020, an estimated equivalent of approximately \$5 billion USD.

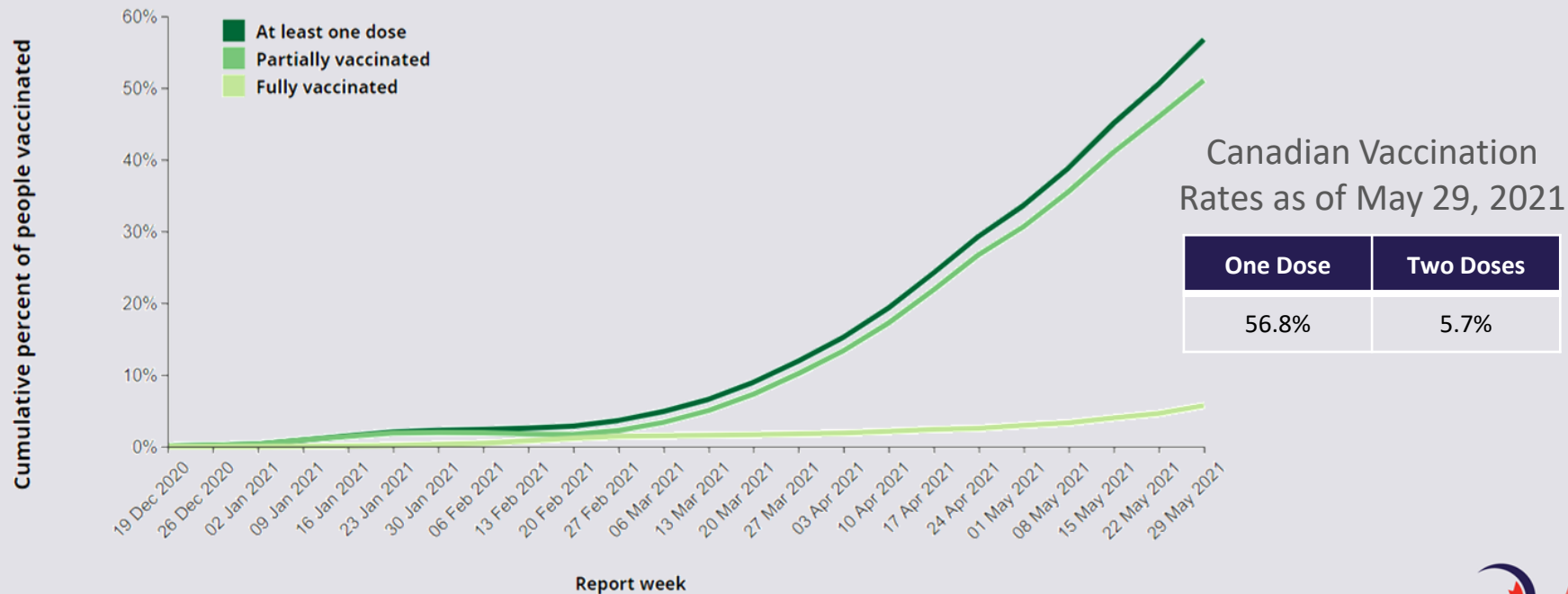
**Arctic Winter Games\*** > The Arctic Winter Games are a high-profile circumpolar sport competition for northern and arctic athletes. The games scheduled for March 2020 in Whitehorse, YT were cancelled. The games attract more than 1,950 participants. The economic impact lost due to cancellation in 2020 was calculated at \$9.2 million CAD to Whitehorse.

**Women's World Hockey Championships\*** > The 2020 IIHF Women's World Championships were originally scheduled for April 2020 in Halifax, NS. The games were re-scheduled for May 2021, and eventually cancelled (and then relocated to another city). The economic impact lost due to cancellation in Halifax was calculated at \$5.3 million CAD for the city and \$6.1 million CAD for the province.

**NBA** > The NBA completed its season in Orlando, FL, operating in a closed bubble environment. For franchises across North America, closing their doors to the stadiums is estimated to have cost the league and its franchises approximately 56% losses in total sales (from ticketing and concession sales) or \$350 to \$450 million USD.

\* In these cases the losses only account for the lost spending from visitors and operational costs and do not account for certain local economic impact losses due to cancellation, sunk operating costs, or time invested.

**As vaccination rates increase, so too do plans to re-open the borders, ease travel restrictions, restart amateur and professional sport, and resume international sport event hosting.**



# International Federations have highlighted that delivering sport events safely even under current COVID restrictions is possible and that their collective experience demonstrates it.

Thomas Bach, President of the International Olympic Committee (IOC), recently addressed the International Sport Federations at the International Federation (IF) Forum, hosted by SportAccord on May 25, 2021. Mr. Bach reinforced that this has been a challenging year, but is confident that sport is back on-track for a full recovery, with the targets in sight for the Summer Olympic Games in Tokyo in July 2021.

The International Olympic Committee (IOC), International Paralympic Committee (IPC) and the Organizing Committee of the Olympic and Paralympic Games Tokyo 2020 (Tokyo 2020) launched the second editions of the Tokyo 2020 Playbooks in late April. These Playbooks will act as a model and guidelines for safe international event hosting, based on the experience and lessons learned from the international sport events hosted this past year (International Olympic Committee, April 2021).

The countermeasures detailed in the Playbooks have been built off the work of the scientific and medical communities, as well as the learnings gathered from the International Federations as they worked feverishly to bring sport competition safely to the World (SportAccord IFF, May 2021).

With over 420 World Cup and World Championship events hosted internationally in a safe and COVID-responsible manner this past year, it is safe to say that the international sport community, including sport event rights holders, experienced organizing committees and hosts, are ready to bring international sport events, training camps, and competitions back to Canada safely and responsibly.

"Since last year (2020), the International Federations have collectively organized over **420 World Cups and World Championships**, with a participation cumulatively of **over 51,000 athletes**. In doing so, [the IFs] have demonstrated that sports competitions can be organized safely, even under current restrictions." Thomas Bach, President, International Olympic Committee (IF Forum, May 25, 2021)

# Research Results

**International Event  
Rights Holders**



# International Event Rights Holders



# Profile – International Event Rights Holders

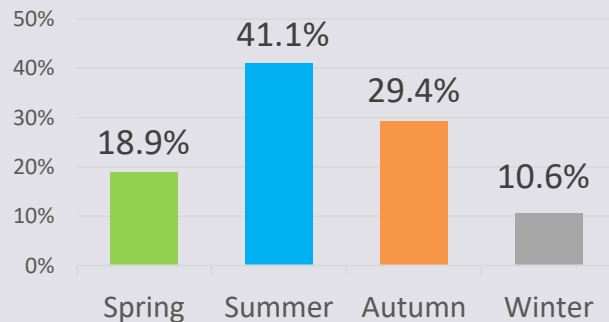
International event rights holders responding to this survey aggregately represent **82 different sports**.



Respondents host an average of **44 events** over the course of a typical year.

Type of Events	Average # Events Hosted per Year of this Type
One-off	1.7
Annual	18.4
Biennial	12.2
Quadrennial	1.7

Average % of Total Events by Season



More than **41%** of events hosted by respondents are hosted in the months of June, July, August.





# Profile – International Event Rights Holders

Respondents highlighted that they collectively have selected to host their events in **47 different countries**, with Canada, the United States and Australia being the most frequented host countries.



## % of Total Respondents Indicating the Top Five (5) Host Countries over the Past Five (5) Years

<b>Canada</b>	43.5%
<b>United States</b>	43.5%
<b>Australia</b>	34.8%
France	21.7%
Germany	21.7%
United Kingdom	21.7%
Russia	17.4%
Argentina	13.0%

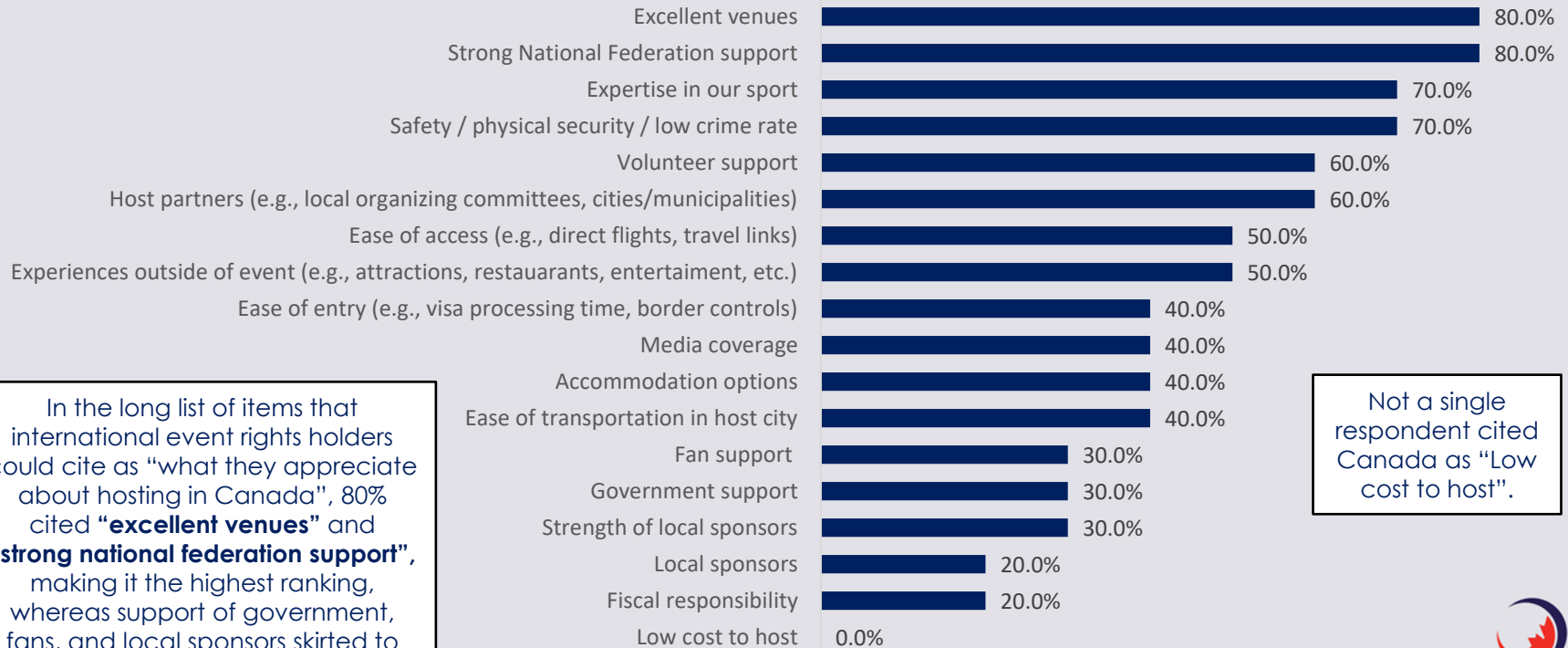
Brazil	13.0%
Chile	13.0%
China	13.0%
Mexico	13.0%
Serbia	13.0%
Turkey	13.0%
Austria	8.7%
Belarus	8.7%

Italy	8.7%
Japan	8.7%
Poland	8.7%
Portugal	8.7%
Switzerland	8.7%
United Arab Emirates	8.7%
<b>25 Other Countries</b>	4.4%



# What Makes Canada Great as a Host Nation

## What Respondents Appreciate About Hosting in Canada / What Makes Canada a Unique Host



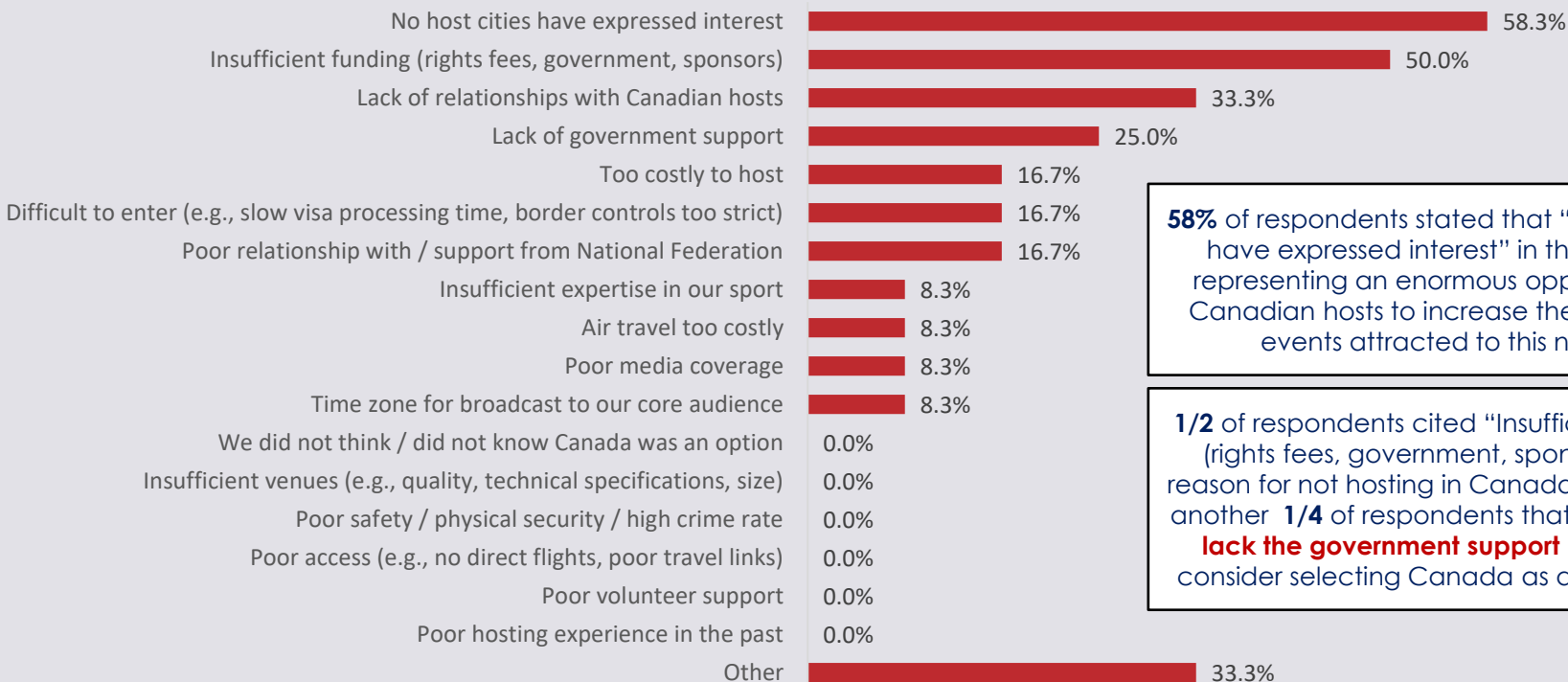
In the long list of items that international event rights holders could cite as “what they appreciate about hosting in Canada”, 80% cited **“excellent venues”** and **“strong national federation support”**, making it the highest ranking, whereas support of government, fans, and local sponsors skirted to the bottom of the list.

Not a single respondent cited Canada as “Low cost to host”.



# Where Canada Has Room for Improvement as a Host Nation

## Respondent Reasons For Not Hosting Any Events In Canada



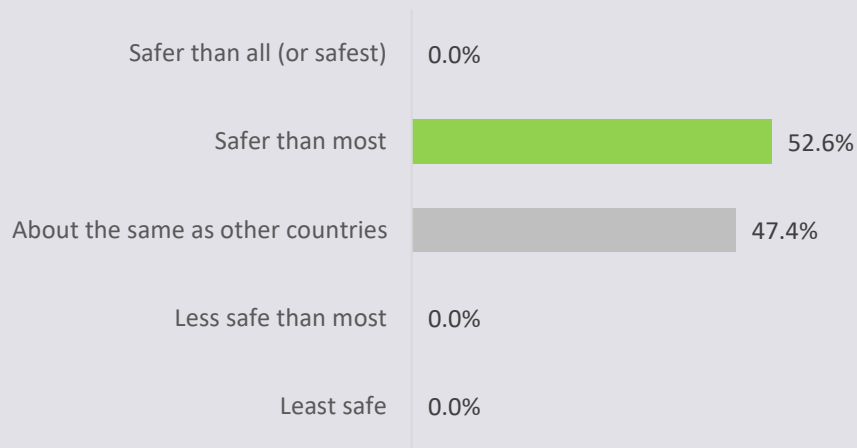
**58%** of respondents stated that “No host cities have expressed interest” in their events, representing an enormous opportunity for Canadian hosts to increase the number of events attracted to this nation.

**1/2** of respondents cited “Insufficient funding (rights fees, government, sponsors)” as a reason for not hosting in Canada, followed by another **1/4** of respondents that believe they **lack the government support** needed to consider selecting Canada as a host nation.



# Perceived Safety Relative to Other Host Nations

## How Does Canada Compare to Other Countries in Perceived “Safety”?



Canada's advantage as a host nation prior to the pandemic was safety, and excellence in operational planning and delivery. COVID-19 has eroded any sentiment of high levels of safety and excellence in operational planning.

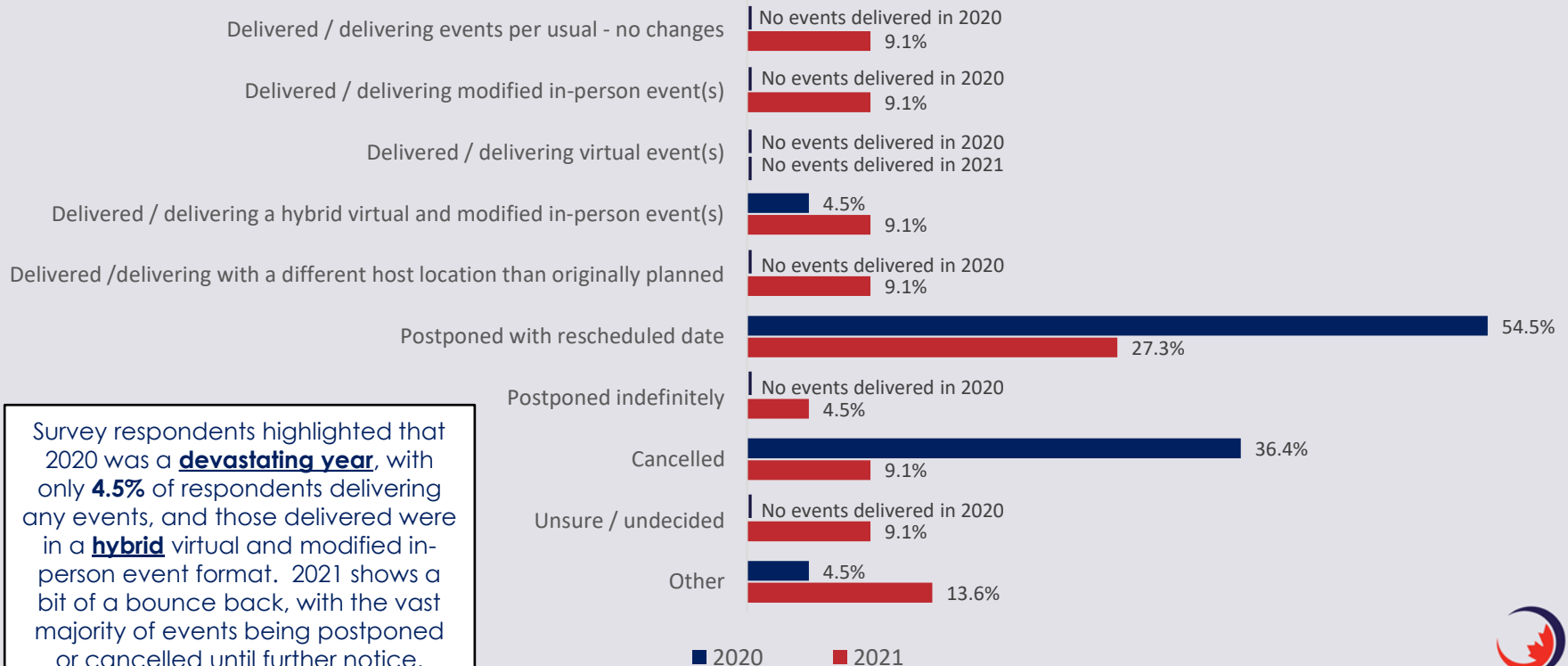
At the time of the survey, however, the verdict was split among respondents, with 52% believing that Canada is “safer than most” as a sport host nation, while 47% of respondents saw absolutely no difference from other host nations.

Losing this edge could impact our competitiveness as a host nation and the perceived value of hosting future international events, if safety is no longer a distinguishing factor.



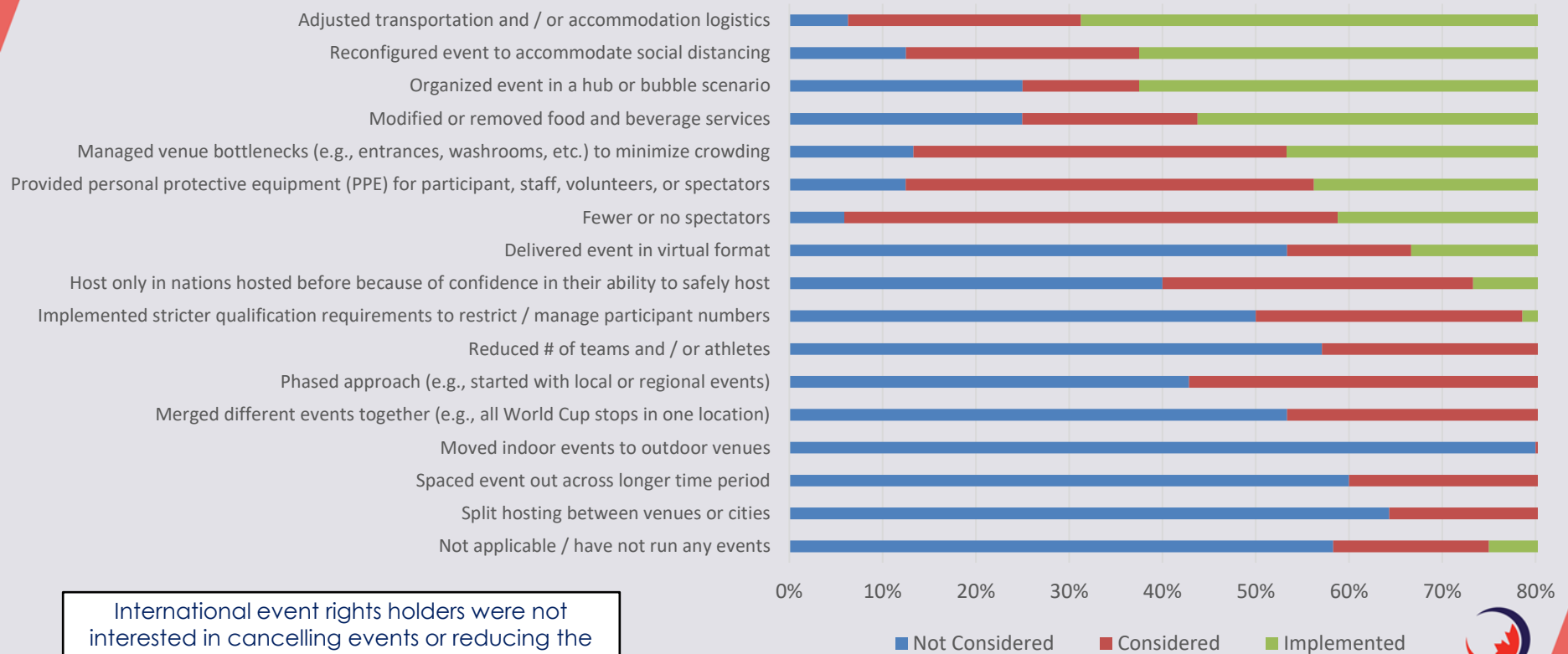
# International Sport Event Status for 2020 and 2021

## % of Respondents that Delivered Events in the Following Formats



# Event Modifications

## % of Respondents that Considered Proposed Event Modifications

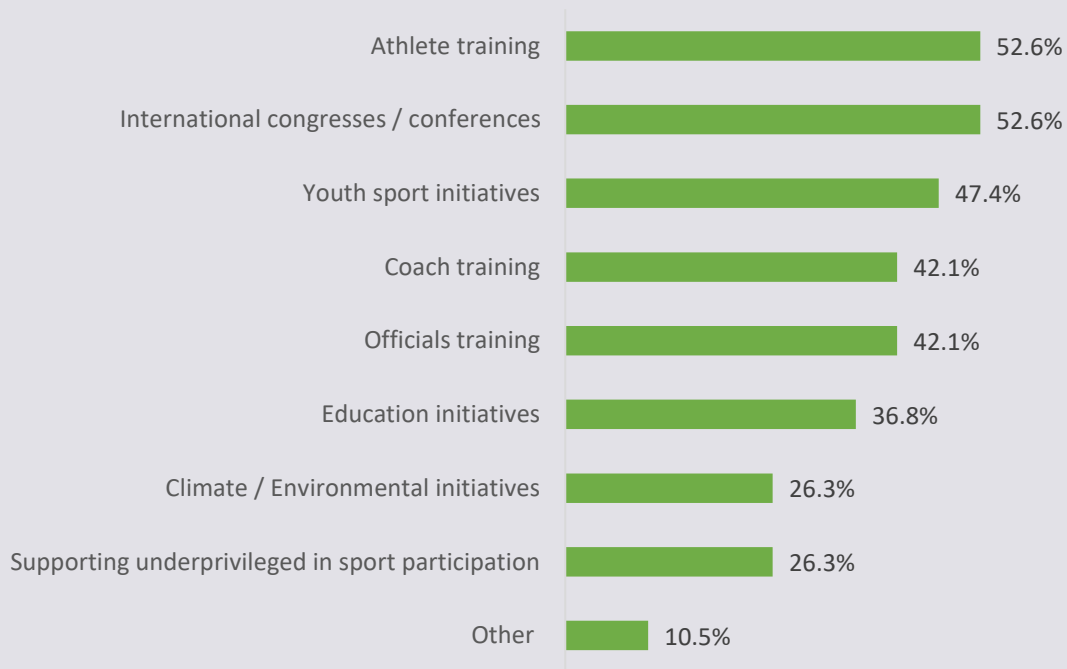


International event rights holders were not interested in cancelling events or reducing the # of athletes, but rather focused on delivering safe events through modified operations.



# Event Types Considered for Hosting Aside from Competition

## % of Respondents Considering Other Types of Events

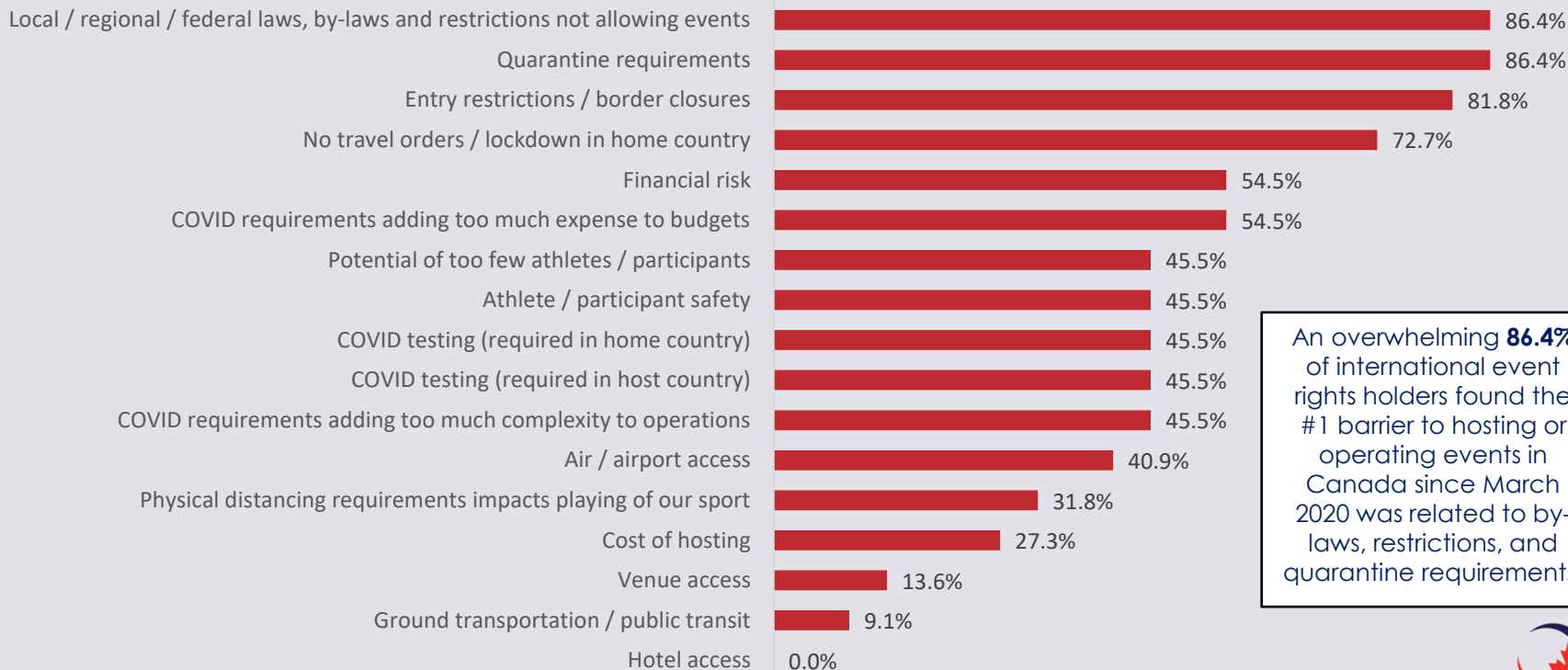


Given restrictions on sport competitions, international federations shifted focus to other activities and events such as athlete, officials and coach training, youth initiatives, and international congresses. These type of events are more flexible (due to fewer technical requirements for set up and equipment) and are more easily adapted to smaller groups, alternate or virtual event formats, etc.



# Perceived Barriers to Hosting / Operating Events in Canada

% of Respondents That Perceive (x) as a Barrier to Hosting / Operating Events



An overwhelming **86.4%** of international event rights holders found the #1 barrier to hosting or operating events in Canada since March 2020 was related to by-laws, restrictions, and quarantine requirements.





# Perceived Barriers to Hosting / Operating Events in Canada

% of Respondents That Perceive (x) to Be the Greatest Barriers to Event Hosting in Canada

Barrier	Largest	2 <sup>nd</sup> Largest	3 <sup>rd</sup> Largest	Overall
Local / regional / federal laws, by-laws and restrictions	<b>30.0%</b>	10.5%	21.1%	<b>61.6%</b>
Entry restrictions / border closures	10.0%	26.3%	15.8%	<b>52.1%</b>
Quarantine requirements	20.0%	15.8%	0.0%	<b>35.8%</b>
No travel orders / lockdown in home country	5.0%	10.5%	15.8%	31.3%
COVID requirements adding too much complexity to operations	0.0%	10.5%	15.8%	26.3%
Athlete / participant safety	10.0%	5.3%	10.5%	25.8%
Financial risk	5.0%	5.3%	5.3%	15.5%
Potential of too few athletes / participants	5.0%	0.0%	10.5%	15.5%
COVID requirements adding too much expense to budgets	0.0%	10.5%	0.0%	10.5%
Air / airport access	5.0%	0.0%	5.3%	10.3%
Cost of hosting	10.0%	0.0%	0.0%	10.0%
Venue access	0.0%	5.3%	0.0%	5.3%

NOTE: None of the other barriers listed on the previous slide were ranked in the top 3 largest barriers impacting the hosting of events.

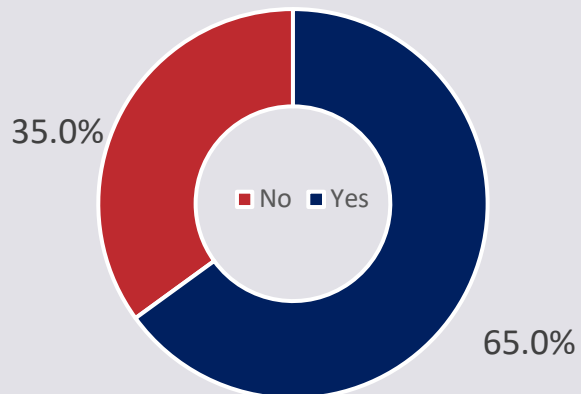
Strict health regulations and government restrictions lead to barriers to hosting events. Similar to domestic rights holders, international event rights holders need clarity on travel, health and operational restrictions to determine Canada's suitability and viability to host. Canada's varying restrictions and opening strategies across provinces and territories make understanding the country's suitability and desirability to host more limited.



# The Importance of COVID-19 Metrics and Reporting

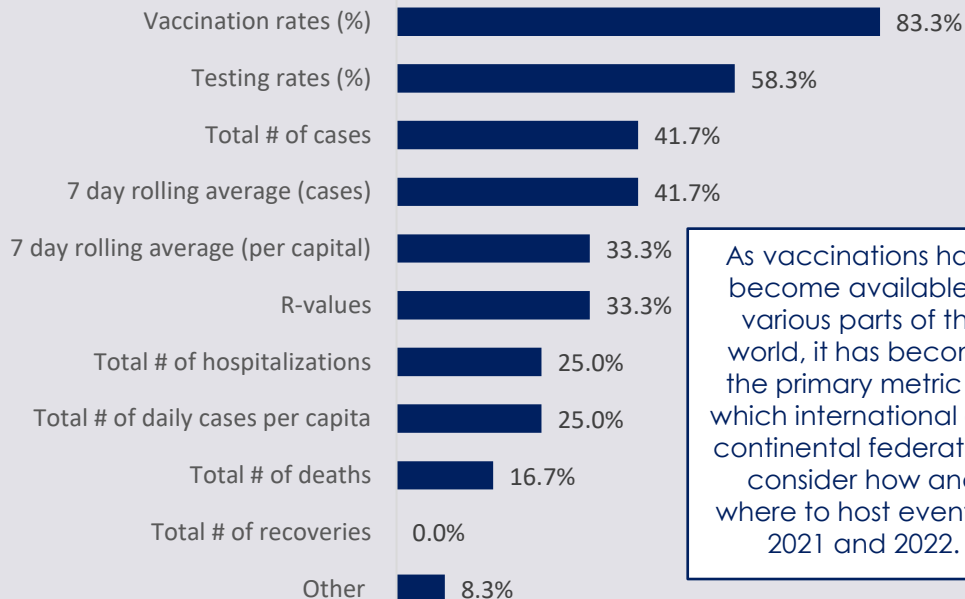


Are particular COVID-19 “Country Metrics” taken into consideration when determining whether or not to host events in Canada?



65% of respondents indicated COVID-19 specific metrics must be met before considering hosting events in a particular country.

## % of Respondents Considering (x) Metric

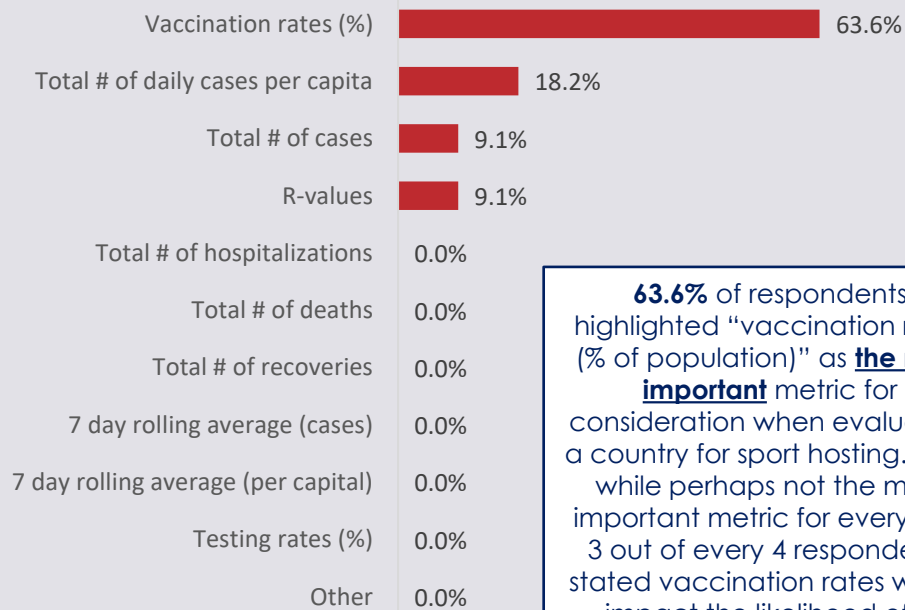


As vaccinations have become available in various parts of the world, it has become the primary metric by which international and continental federations consider how and where to host events in 2021 and 2022.



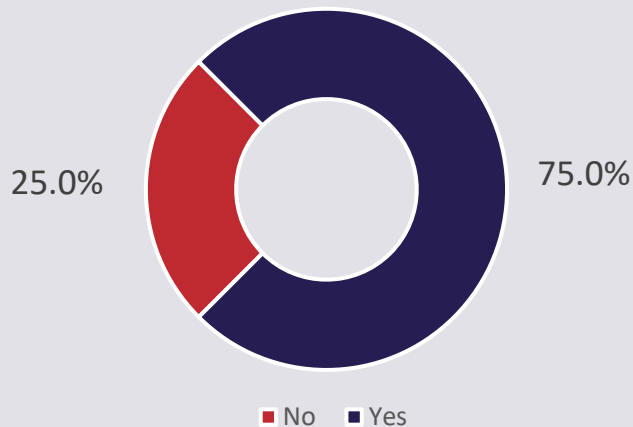
# The Importance of COVID-19 Metrics and Reporting

% of Respondents that Feel (x) Metric is the Most Important



**63.6%** of respondents highlighted "vaccination rates (% of population)" as **the most important** metric for consideration when evaluating a country for sport hosting. And while perhaps not the most important metric for everyone, 3 out of every 4 respondents stated vaccination rates would impact the likelihood of a country winning a bid.

Will vaccination rates impact the likelihood of hosting events in Canada in 2021 and 2022?

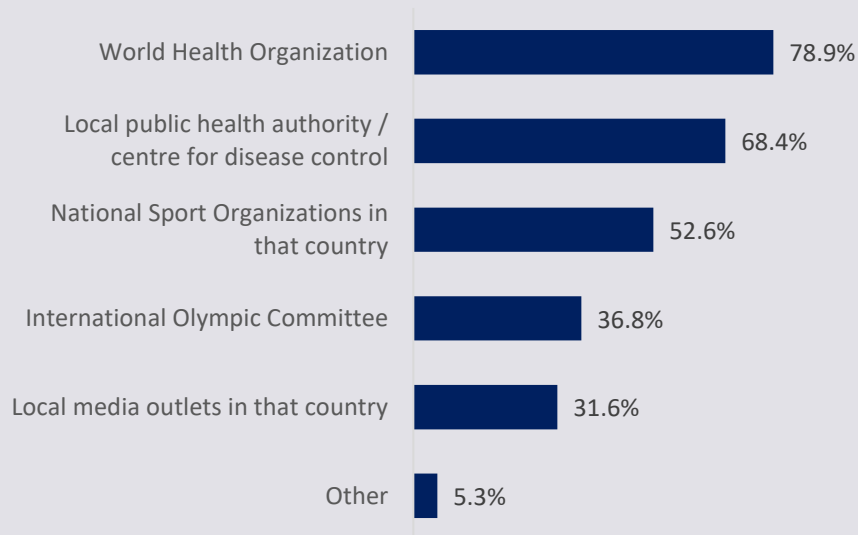


**No** = no, vaccination levels will NOT impact our plans to host events in 2021 and 2022

**Yes** = yes, vaccination levels will impact the size, scope, and number of events we host in 2021 and 2022

# The Importance of “Official” COVID-19 Data

Where do you source information about the status of COVID-19 for host countries?

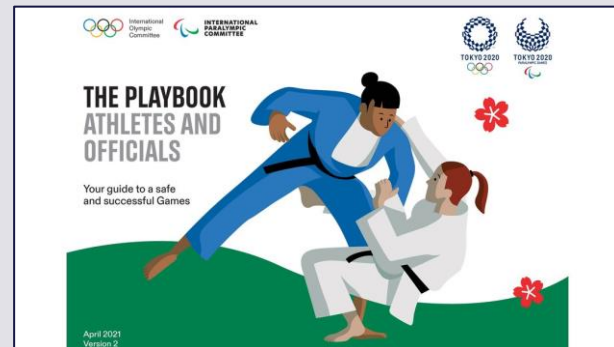
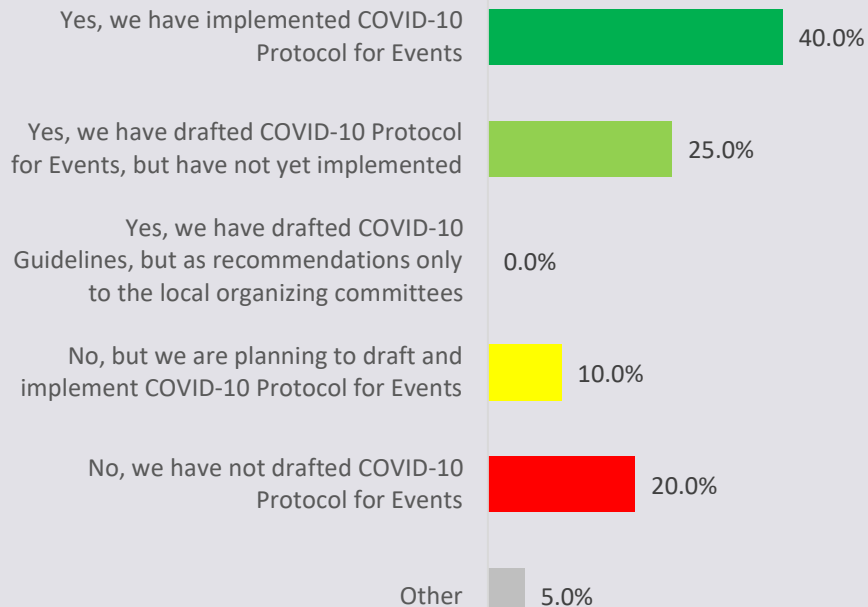


Despite wide-spread access to COVID-19 Information through media sources globally and locally, international event rights holders still rely on the “official health agencies” like the World Health Organization and local public health authorities for information about the status of COVID-19 for each host country.



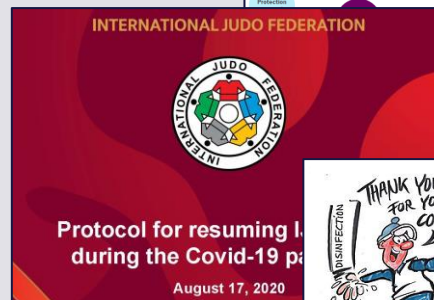
# COVID-19 Protocols

Has your organization drafted and implemented COVID-19 protocols for events?



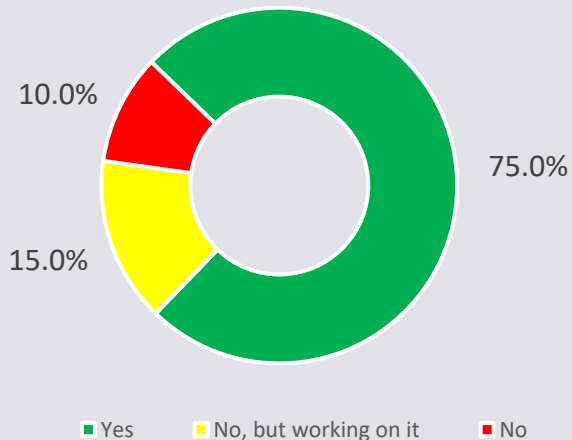
safe return to practice  
COVID-19

Production



# COVID-19 Protocols

## Created Special Working Group to Support COVID-19 Protocols



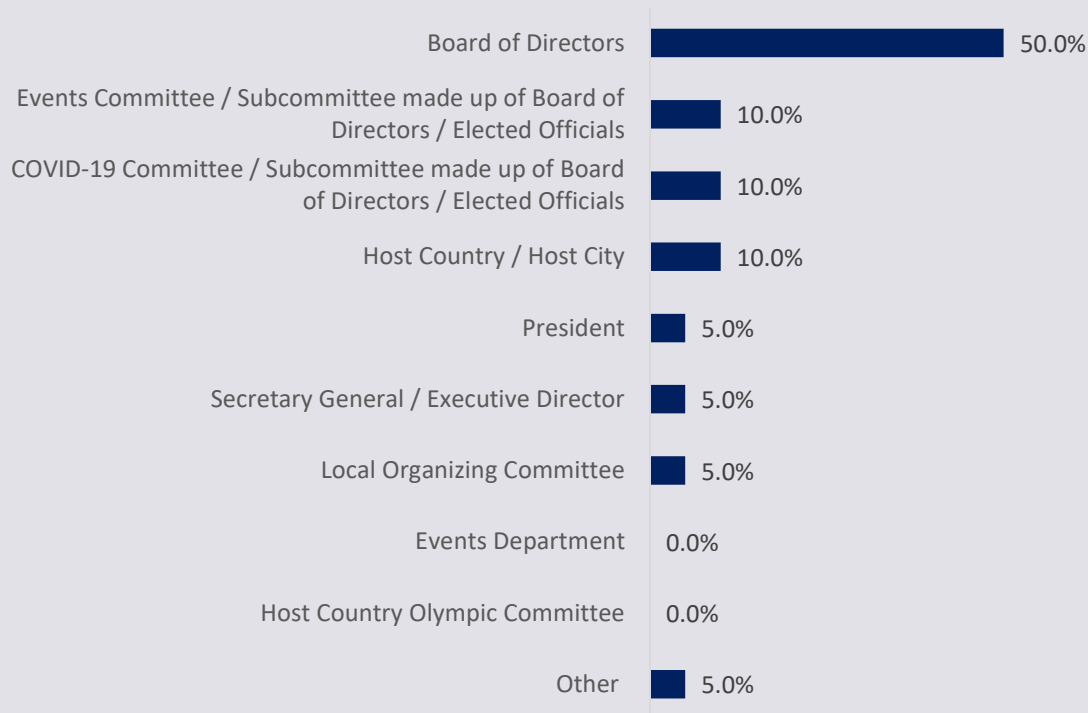
**75%** of respondents indicated that they have created a Special Working Group to support the development of COVID-19 protocols. It is encouraging to see that **93.3%** of respondents with working groups have medical professionals involved.

## % of Respondents with (x) Selected for their COVID-19 Special Working Group



# Who Is Making the Decisions for a “Go” or “No Go”

## Greatest Influence on Events Taking Place



**50%** of respondents highlighted that the **Board of Directors** currently has the greatest influence on whether or not an event takes place. Interestingly, only **5%** stated that the local organizing committee had the greatest influence, despite the fact the host team is on the ground and responsible for managing the safety of athletes, coaches and officials.



# Factors of Importance for Permitting Event “Go Ahead”

Rating: Importance of Components for Permitting Events Taking Place

Component	Not at All	Not Very	Somewhat	Very	Top 2 Box
Ease of air access to host cities	5.0%	0.0%	40.0%	55.0%	95.0%
Limited border closures or entry restrictions	5.0%	5.0%	10.0%	80.0%	90.0%
Pre-event testing of all participants, coaches, officials and volunteers	5.0%	10.0%	35.0%	50.0%	85.0%
Revenue / financial assurance	5.3%	10.5%	21.1%	63.2%	84.3%
More lax quarantine requirements in host country	5.3%	10.5%	42.1%	42.1%	84.2%
Sufficient accommodations that meet COVID-19 health and safety standards	5.3%	10.5%	36.8%	47.4%	84.2%
Stiffer quarantine requirements in host country	23.5%	0.0%	41.2%	35.3%	76.5%
Readily available personal protective equipment	0.0%	26.3%	57.9%	15.8%	73.7%
Mask requirements in public and / or event venue	5.3%	21.1%	31.6%	42.1%	73.7%
Event bubble	15.0%	15.0%	30.0%	40.0%	70.0%
Low number of new COVID-19 cases	10.5%	21.1%	42.1%	26.3%	68.4%
Ease of operations (minimal requirements from local gov't / health agencies)	10.5%	21.1%	36.8%	31.6%	68.4%
Sufficient vaccination rates in host location	5.0%	30.0%	25.0%	40.0%	65.0%
High public COVID-19 testing rates in host location	0.0%	42.1%	36.8%	21.1%	57.9%
Vaccination passport	15.8%	31.6%	21.0%	31.6%	52.6%
Daily or ongoing COVID-19 testing	10.5%	36.8%	36.8%	15.8%	52.6%
Minimal COVID-19 hospitalization and ICU rates	5.3%	42.1%	15.8%	36.8%	52.6%
Limited spectators	27.8%	22.2%	33.3%	16.7%	50.0%
No spectators	27.8%	33.3%	27.8%	11.1%	38.9%

\* Top 2 Box = Somewhat + Very



# Factors of Importance for Permitting Event “Go Ahead”

Rating: Importance of Components for Permitting Events Taking Place

In the survey with domestic event rights holders, “Ease of air access to host cities” was lower on the list of importance for hosting events. The #1 ranking of air access demonstrates that host cities need to consider this and be strategic in positioning their city as a possible host.

International federations have listed spectator presence at the very bottom of their list of current important factors for hosting. This isn't to suggest that international federations don't want or appreciate spectators, but that during the pandemic, events can still take place without the fans.

Component	Not at All	Not Very	Somewhat	Very	Top 2 Box
Ease of air access to host cities	5.0%	0.0%	40.0%	55.0%	95.0%
Limited border closures or entry restrictions	5.0%	5.0%	10.0%	80.0%	90.0%
Pre-event testing of all participants, coaches, officials and volunteers	5.0%	10.0%	35.0%	50.0%	85.0%
Revenue / financial assurance	5.3%	10.5%	21.1%	63.2%	84.3%
More lax quarantine requirements in host country	5.3%	10.5%	42.1%	42.1%	84.2%
Sufficient accommodations that meet COVID-19 health and safety standards	5.3%	10.5%	36.8%	47.4%	84.2%
Stiffer quarantine requirements in host country	23.5%	0.0%	41.2%	35.3%	76.5%
Readily available personal protective equipment	0.0%	26.3%	57.9%	15.8%	73.7%
Mask requirements in public and / or event venue	5.3%	21.1%	31.6%	42.1%	73.7%
Event bubble	15.0%	15.0%	30.0%	40.0%	70.0%
Low number of new COVID-19 cases	10.5%	21.1%	42.1%	26.3%	68.4%
Ease of operations (minimal requirements from local gov't / health agencies)	10.5%	21.1%	36.8%	31.6%	68.4%
Sufficient vaccination rates in host location	5.0%	30.0%	25.0%	40.0%	65.0%
High public COVID-19 testing rates in host location	0.0%	42.1%	36.8%	21.1%	57.9%
Vaccination passport	15.8%	31.6%	21.0%	31.6%	52.6%
Daily or ongoing COVID-19 testing	10.5%	36.8%	36.8%	15.8%	52.6%
Minimal COVID-19 hospitalization and ICU rates	5.3%	42.1%	15.8%	36.8%	52.6%
Limited spectators	27.8%	22.2%	33.3%	16.7%	50.0%
No spectators	27.8%	33.3%	27.8%	11.1%	38.9%

# The Role of Tokyo 2020 in Boosting the Confidence to Host



## Does the determination to go ahead with Tokyo 2020 in July 2021 have any influence on your organization's confidence to host events safely?

Yes, the International Olympic Committee and Local Organizing Committee are viewed to be setting the standard	10.0%
Yes, our events are directly tied to Olympic qualification and as such are a mandatory part of the Olympic events cycle	0.0%
Yes, we will be observing closely how Tokyo manages the event and COVID-19 protocol	10.0%
No, the resources of the Tokyo 2020 Olympics far outweigh what we have access to, therefore no significant bearing	45.0%
No, we have COVID-19 protocol in place and feel confident in hosting events safely with or without the Tokyo Olympics example	20.0%
Unsure / no opinion	10.0%
Other	5.0%

There is an interesting perspective on the role of the International Olympic Committee on the impact of hosting the Tokyo 2020 Olympic Summer Games versus the “go ahead” influencing an international event rights holders’ confidence in hosting. As mentioned by IOC President, Thomas Bach, the COVID-19 Playbooks (protocol) have been developed from the direct input and lessons learned from the international federations. Even if the IOC does set the standard for the industry, **45%** of organizations felt that the resources of Tokyo 2020 outweighed what they had access to, and therefore the decision had no particular bearing on their confidence to host.

# COVID-19 Protocols and Perceived Comfort / Safety Level

## Perception of Comfort / Safety Level of Event Return by Participant Group

Group & Activity	Not at all Comfortable	Somewhat Uncomfortable	Somewhat Comfortable	Very Comfortable	Top 2 Box
Staff level of comfort working in a competition environment	15.0%	15.0%	45.0%	20.0%	65.0%
Volunteers' level of comfort working in a competition environment	15.0%	15.0%	45.0%	20.0%	65.0%
Spectators' level of comfort attending in-person	15.8%	15.8%	47.4%	15.8%	63.2%
Athletes' level of comfort competing	15.0%	25.0%	30.0%	25.0%	55.0%
Athletes' level of comfort travelling	20.0%	25.0%	35.0%	10.0%	45.0%
Entourage (e.g., friends, parents) level of comfort travelling / competing	21.1%	47.4%	26.3%	0.0%	26.3%

There is a general feeling of safety and comfort level for staff, volunteers, and spectators to work and attend sporting events. This is slightly less for athletes competing and even further less for athletes travelling. Rights holders feel the least comfortable having the athletes entourage present and/or travelling with the athletes as this is the one group they would have least control over.



# Who Is “Bouncing Back” Successfully?

“individual sports”

“motorsports”

“Olympic sports”

## Sports or Rights Holders Successfully Running Events Despite COVID-19

“tennis”

“badminton”

“NBA”

“skiing”

“curling”

An underlying consensus among respondents was that well-financed sports (like professional leagues), individual sports, and outdoor sports were in a better position to implement COVID protocol swiftly and get back to competition sooner. Sports that are part of the Olympic program have successfully run a number of events internationally. Being part of the Olympic program, there is greater urgency to run events, as there is a timeline meet for Tokyo 2020 or Beijing 2022 qualification.

## Countries Successfully Positioning Themselves to Host Events Despite COVID-19

“the USA without a doubt, because they have extremely lax COVID-19 rules”

“Australia and New Zealand because of low infection rates”

“USA – they are less concerned about COVID and more with getting back to normal”

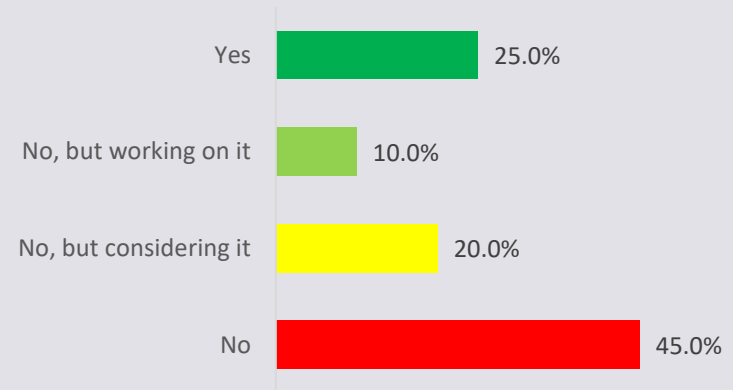


# Adapting for Successful Event Delivery – Virtual Formats

Part of the reason why some of the sports or sport events cited by respondents have been successful is because of the creativity of international event rights holders to create new and modify existing event formats.

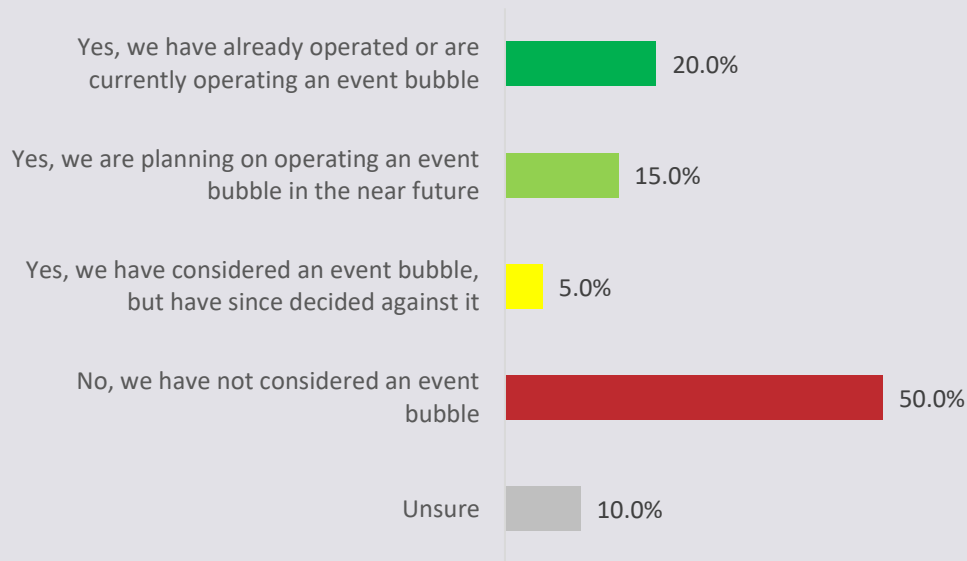
Survey respondents were decisive about virtual event formats – the majority were either in or they were out. **25%** of respondents highlighted that they have altered the sport event format. The implications of “virtual event formats” on local hosts is yet to be determined, and would vary by event and sport.

## Altered Sport Event Format to Incorporate Virtual Component



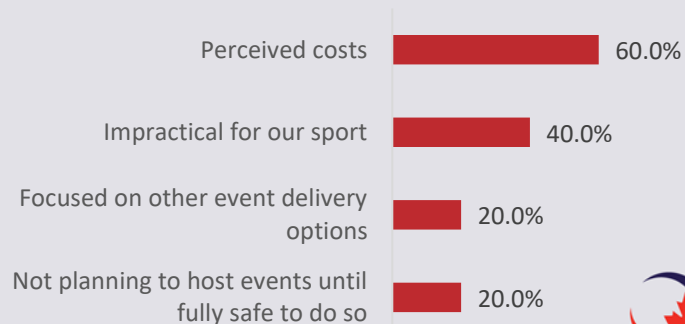
# Adapting for Successful Event Delivery – Competition Bubbles

## % of Respondents that Considered Running Event in “Bubble” Format



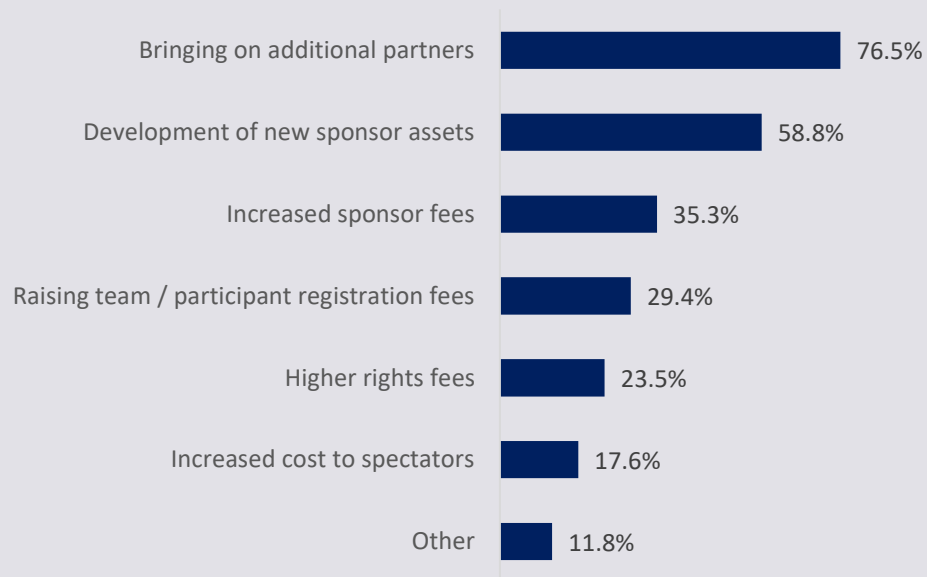
Interestingly, **35%** of respondents are planning to or are currently operating an event bubble. The event bubble refers to containing the entire event, all operations, people involved, etc. in one location. The complexity of setting up an event bubble and the effort / investment required is notable. It is not surprising then, that **60%** of respondents currently not considering a bubble as a viable event format perceive the cost of a bubble as the reason why they have not considered it.

## Reasons NOT Considered



# Fiscal Realities of the Pandemic on International Sport Events

% of Respondents Covering Increased Cost(s)  
of Sport Events through (x)



Nearly all international event rights holders have cited "cost to host" as a key consideration (and deterrent) for hosting in Canada. COVID-19 is increasing operating costs for all international sport events due to the implementation of protocol, requirements for more space, less athletes per hotel room, new technology for COVID-tracking and detection, etc.

**76.5%** of respondents have highlighted the need to bring on additional partners to cover increased costs of sporting events, followed by **58.8%** indicated the need to develop new sponsor assets.

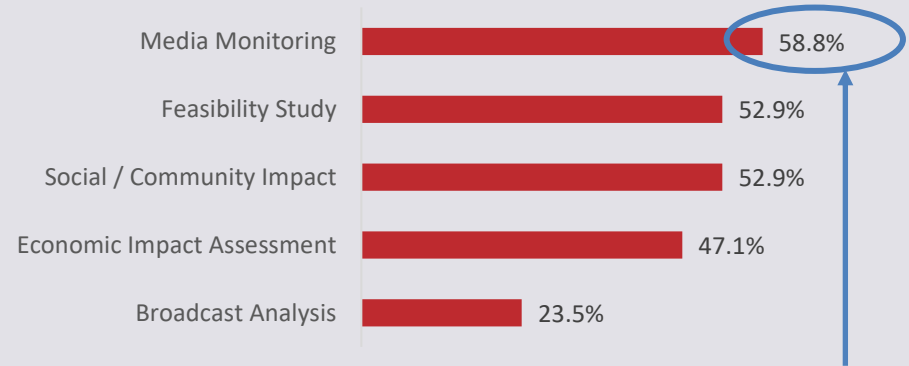


# Fiscal Realities of the Pandemic on International Sport Events

## How have your corporate sponsor / partner agreements or programs been affected as a result of the pandemic?

Have reduced the monetary value of agreements / commitments for 2021	33.3%
Maintained full terms of agreements in 2020	22.2%
Have shifted agreements / commitments to 2022 (or beyond)	22.2%
Unsure of full impact	16.7%
Have secured new sponsorship agreements	11.1%
Have maintained full investment for 2021, with no changes to terms and conditions	11.1%
Have maintained full investment for 2021, but with changes to the terms and conditions	11.1%
Have lost the majority of our sponsor investment	11.1%
We do not have a corporate sponsor / partner program	11.1%
Have shifted agreement to other commitments (e.g., virtual event, downsized event, media buy, etc.)	5.6%

## New Key Performance Indicators Introduced for Host Cities or Organizing Committees



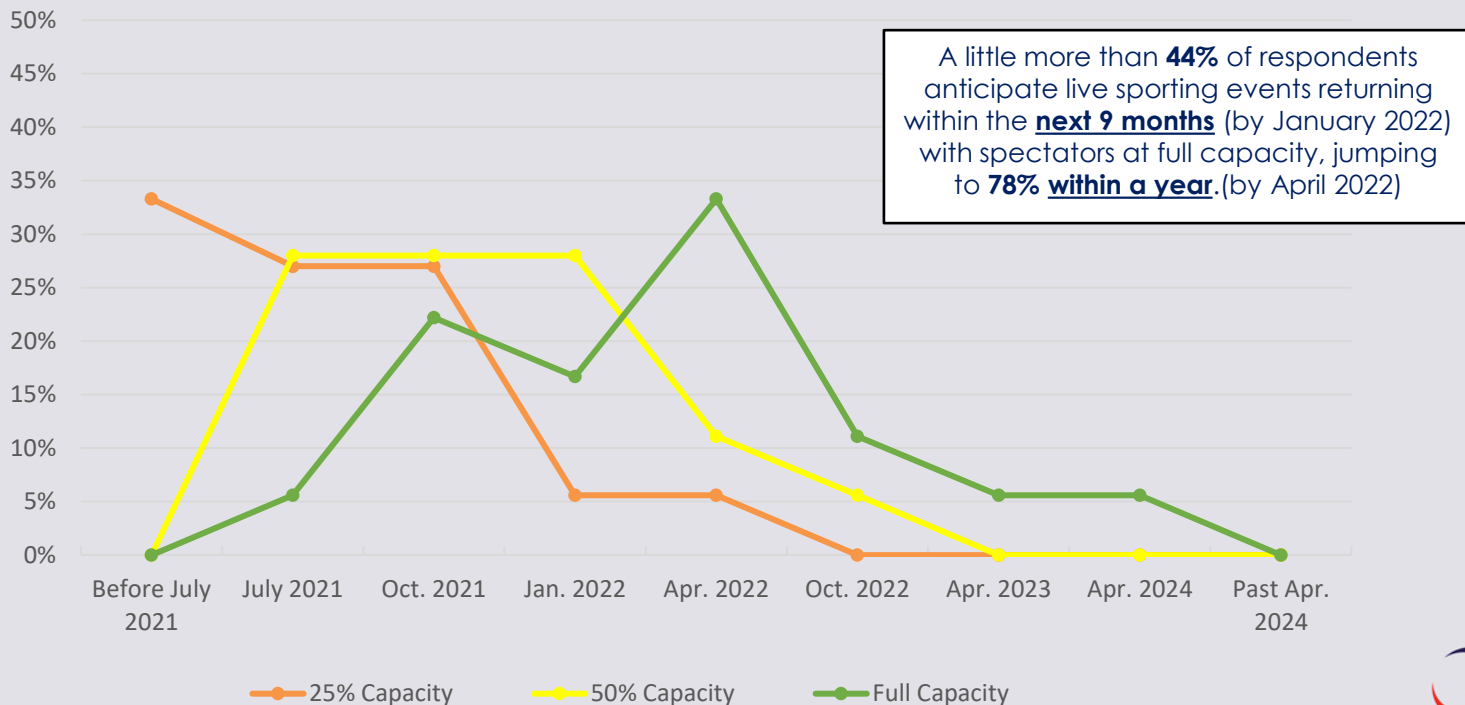
**33.3%** of respondents stated they have had to reduce the monetary value of sponsor / partner agreements for 2021.

New measures have been brought into effect to monitor the success of events. **Media monitoring** is at the top of the list. With on-site spectatorship being limited to non-existent, broadcasting and online audiences have become paramount.



# Return to Spectators

Anticipated Return Until Live Sporting Events with Spectators by Venue Capacity  
(as at survey date – April 2021)



# Prioritizing Event Hosts Based on 2020 / 2021 Cancellations

**For future years, are you prioritizing hosting events in locations where events were cancelled in 2020? Or are you considering reopening the bidding process?**

Yes, we will host our next events in the host cities where events were cancelled in 2020	25.0%
No, we will host our next events in other host cities in order to maintain the schedule with cities previously awarded events for 2021, 2022, etc. with no commitment to return to the 2020 host city	20.0%
No, we will host our next events in other host cities in order to maintain the schedule with cities previously awarded events for 2021, 2022, etc. with the goal to return to the 2020 host city in future	20.0%
No, we have re-opened the bidding process for upcoming events	15.0%
Unsure, we have not made any decisions about future event hosting	15.0%
Other	5.0%

There is mixed news for Canadian hosts impacted by COVID-19 and subsequent event cancellations. **45%** of respondents highlighted that they have already committed to or have intent to come back to the host city intended to host in 2020/2021. **50%** of respondents indicated that host cities that experienced event cancellations in 2020 / 2021 are back to square one and will be required to re-enter the bid process, with no commitment for an event to return.



# Case Studies

**Calgary Curling Bubble**

**IIHF World Junior Championship**

**CPL (Soccer) Bubble PEI**

# Case Study: Calgary Curling Bubble



**Background / Context:** Curling Canada hosted seven (7) prestigious curling competitions in a bubble environment at the Markin MacPhail Centre at WinSport's Canada Olympic Park in Calgary, Alberta. The competitions all took place in 2021 and included the Scotties Tournament of Hearts (Feb 19-28), Tim Hortons Brier (Mar 5-14), Home Hardware Canadian Mixed Doubles Championships (Mar 18-25), World Men's Curling Championships (Apr 2-11), Champions Cup (Apr 15-19), Players Championship (April 20-25), and the World Women's Curling Championship (Apr 30-May 9).

**Why are these tournaments important?** The Scotties, Brier and the Canadian Mixed Doubles Championships crown our Canadian champions, who then head to the World Championships – an Olympic qualifying tournament for six (6) teams for Beijing 2022.

**The Approach:** Dubbed "Hub City," Calgary, AB hosted seven (7) major competitions in a bubble environment. These events would normally be distributed across Canada and around the world, but the bubble concept created a safe and effective competition calendar for athletes during an Olympic qualification year.

The event venues were divided into Green, Blue, and Red Zones.

A total of 531 individuals entered the Green Zone of the bubble which included the hotel as well as the arena and ice surface. The Green Zone was reserved for athletes, coaches, ice technicians and staff members. Blue Zone access was for the host broadcast crew who had to enter the arena through a separate entrance. Red Zone access was for officials, volunteers, and media (not allowed to enter the field of play), who also had a separate entrance to the arena.

## Key Facts & Figures:

- Seven (7) events
- 531 athletes, coaches and officials
- Four (4) ice sheets, 5 multi-purpose areas served as dressing rooms
- \$11 million in economic impact
- 3,500 COVID-19 tests performed
- World Men's had four (4) false positive COVID-19 tests
- Two (2) German athletes tested positive and denied access to bubble
- Seven (7) positive cases at the World Women's in the broadcast crew shutting down domestic and international feeds for five (5) days





# Case Study: Calgary Curling Bubble

## Noteworthy COVID Protocol:

- Strict pre- and post-arrival quarantine protocol
- Required negative Polymerase chain reaction (PCR) test 72 hours pre-departure, upon arrival, and during the events
- Two hotels (one for participants and another for broadcast crew) with single occupancy hotel rooms with no general public allowed
- Transportation to the arena with no stops in between permitted
- Distinct access areas (Green, Blue, and Red Zones) for participants
- Health wellness checks including temperature checks conducted daily
- All bubble participants had to download the Federal COVID Alert App and the Alberta Trace Together App

## Notable Wins & Successes:

- Worked with all levels of government and health officials to develop the safest protocols, taking significant learnings from the NHL bubble and Hockey Canada
- Extensive broadcast to millions of curling fans
- Contained positive cases before bubble entry with support of Chief Medical Officer onsite
- Organizing committee responded to “zero family” protocol to allow nursing mothers to have their baby and one caregiver
- Demonstrated success allowed Calgary to centralize events previously awarded to other hosts

## Key Considerations & Lessons Learned:

- Collaborative effort required from all stakeholders, athletes, coaches, officials and broadcasters to make the bubble successful
- International curling teams arrived via commercial flights, not charters, which increased exposure risk
- Despite separate bubbles for broadcast, the outbreak lead to the shut down of television broadcast, which is a key source of revenue
- Keeping fans engaged throughout the tournaments was paramount as a precursor to filling curling arenas post-COVID



# Case Study: 2021 IIHF World Junior Championship



**Background / Context:** The International Ice Hockey Federation (IIHF) awarded the 2021 World Junior Championship to Edmonton and Red Deer in December of 2018. On September 17, 2021 it was announced the annual Christmastime tournament would be held in a bubble in Edmonton. After Edmonton and the Oilers Entertainment Group (OEG) had successfully hosted one of two National Hockey League bubbles for the 2020 Stanley Cup playoffs, it was determined this was the best way to hold the event, despite the pandemic. The event will return to Edmonton and Red Deer for the 2022 edition.

**The Approach:** To simplify movement of participants, and to build on the experience Edmonton gained while hosting the NHL bubble in the summer of 2020, the decision was made to concentrate the tournament solely in Alberta's capital. This was a significant shift for the tournament which had planned to have a portion of the event played in Red Deer, 90 minutes south of Edmonton.

Part of the reason to host in Edmonton is the direct links between host arena Rogers Place, a practice facility, and the two hotels used to house participants. Organizers could control participant contact to only tournament people while delivering the necessary event elements.

No spectators were present for the games so broadcast and media were paramount to share the tournament with audiences. 1.1 million people, on average, watched each game, a number which jumped to 2.5 million for each Canadian game. 12 countries broadcast at least one game from the tournament.

## Key Facts & Figures\*:

- Tournament dates from December 25, 2020 – January 5, 2021
- \$30,002,204 in economic impact in Edmonton
- 13,403 room nights split between the JW Marriott and Sutton Place hotels in downtown Edmonton
- 135% increase in social media impressions over 2020 event
- 100+ million worldwide viewers

\* Source - 2021 IIHF World Junior Championship | Hockey Canada Final Report



# Case Study: 2021 IIHF World Junior Championship



**Noteworthy COVID Protocol:** Travel to Edmonton for all 10 participating teams was by private charter to minimize contacts. Testing for athletes, coaches and support officials began in their home country on November 29<sup>th</sup>. Any positive test from that date until the day of travel to Edmonton would mean the individual was ineligible to attend the tournament. Teams were mandated to create their own bubbles at home from December 6<sup>th</sup> with all those in the bubble needing to test negative for COVID-19 three times. The Edmonton bubble accepted guests as of December 13<sup>th</sup> and participants were further required to quarantine individually in their hotel rooms for four days before being 'released' to the broader bubble. This layered approach best ensured that participants, after some time, could safely compete and take part in the tournament.

Source - <https://www.sportingnews.com/ca/nhl/news/world-juniors-2021-how-has-covid-19-impacted-tournament/sdm2x14xdki71a68bh5kaqv3t>

## Notable Wins & Successes\*:

- No COVID infections from participants during tournament time. Two teams had members test positive on arrival and were they quarantined in their hotel rooms for the prescribed period.
- Hosted the tournament during a time when most other events were cancelled.
- Showcased the Rogers Place complex, ICE District amenities, including the JW Marriott Hotel, and Edmonton on national and international television, and to the IIHF for future event considerations.
- Showcased OEG's ability to adhere to and deliver another high quality and safe event in a bubble.

\* Courtesy Stuart Ballantyne, President & COO, Rogers Place & ICE District, OEG

## Key Considerations & Lessons Learned\*:

- Illustrated the power of working together with government, health authorities, the IIHF and Hockey Canada to build protocols that worked for all parties.
- Adjusted the testing timeframes for various groups to maintain a safe but affordable testing plan by setting different testing periods for each level of credential holder based on access and exposure levels to the players and tournament officials.
- Utilized web-ex meetings in the arena to keep groups separate during event, enabling all work to get done.
- On-going evaluation of plans saved the tournament money as we adjusted staffing deployment based on each day's needs and set ups.

*"COVID-19 has changed everything. How we plan events, what the priorities are, how we drive revenues, how we manage expenses, how we engage communities, I think it's all changed. I do believe that we are going to see a reinvention."* **Dean McIntosh, Director, Marketing Services, Hockey Canada.**



# Case Study: Canadian Premier League (Soccer) Bubble PEI



**Background / Context:** The Canadian Premier League is a professional soccer league based wholly in Canada comprised of eight (8) club teams. The League's inaugural year was 2019 and, leading into its second season in 2020, was hindered by the onset and implications of the COVID-19 pandemic. Determined to have a 2020 season, the CPL and Charlottetown, Prince Edward Island hosted all eight (8) clubs for a 35-match season (league games and playoffs) from August 13 to September 19, 2020 at the University of PEI Alumni Field (a FIFA-quality turf field). The bubble was successfully executed with zero (0) COVID cases.

**The Approach:** Dubbed "The Island Games", the 2020 CPL season was conducted in one central location in a bubble format, a single controlled and confined location for all teams, players, officials and staff.

Assembling the pieces to create a safe and effective bubble is an impressive feat that requires the full cooperation and creative solutioning of all local tourism partners. The CPL, for example, acquired 184 rooms for a full six (6) week period at the Delta Hotel Prince Edward, helping isolate the teams from the broader community.

Meetings and Conventions PEI developed an app for players that helped connect them to local business for personalized delivery of food and incidentals. The hotel was staffed with 24/7 security to facilitate deliveries, etc., and prevent co-mingling between the bubble and the community-at-large.

## Key Facts & Figures:

- \$1.5 million investment from PEI
- Competition Aug 13 – Sep 19, 2020
- 300 players and staff
- 900 COVID Assessment Surveys
- 184 hotels rooms for 6 weeks
- 85 additional hotel staff hired
- 85% hotel occupancy rate
- 7000 room nights
- \$5.1 million in direct spend
- 4 billion online impressions
- \$11.75 million in economic impact
- Zero (0) cases of COVID-19





# Case Study: Canadian Premier League (Soccer) Bubble PEI



## Noteworthy COVID Protocol:

- Quarantine protocol pre- and post-arrival, with ongoing on-site testing
- Teams had their own floor and team room, and highly-controlled traffic flow / avoidance of staff interactions
- Meetings and Conventions PEI developed an app for players to connect to local businesses for purchases
- Kinduct Athlete Management System for all athletes, referees, video crew, and club staff
- The Pre-Training Assessment (PTA) sent to athlete's phones each morning for completion before facility arrival
- Custom app developed to help players, staff and video crews access goods from local businesses

## Notable Wins & Successes:

- From hotel to food and beverage to local transportation to venue operations to security – everything was connected and functioning as one
- Combined effort of city, province, Meetings and Conventions PEI, CPL and all clubs
- Outstanding economic impact and direct spend
- Potential for more events with the CPL in future
- Being able to take the brand to market and push fan engagement on social feeds was key for PEI
- 79% hotel occupancy decline the month before (July) to rebound to 85% occupancy (August)
- Zero (0) COVID cases

## Key Considerations & Lessons Learned:

- Everyone needs to work collaboratively across all levels of government, the league, teams, athletes, coaches, broadcasting, officials and everyone involved in the day-to-day operations
- Goals for all parties need to be aligned in advance
- Difficulty getting International players into Canada
- Solid plan that gets signed off in advance by all teams is critical
- Strong and constant communication throughout the duration of the event
- Variation in food menu difficult over two months
- Individuals in bubble desired more outdoor spaces





# Recommendations for an Economic Reboot

via International Events

# Setting the Stage for Recovery via International Sport Events

What COVID-19 has taught us this past year and a half is that the playbook for hosting international sport events of any size is no longer applicable and any attempt to re-write a new one is fragmented, incomplete and experimental at best. Rights holders, host organizations, venues and suppliers to events require additional knowledge and capacity to be nimbler and make better, more informed decisions. The hope is that as the knowledge evolves about COVID-19 and the federal / provincial / regional authorities respond, that this research and any subsequent tools and resources will support the sport tourism industry to pivot to adapt and eventually bounce back. Even post-COVID, international sport event hosting will forever be changed.

Every aspect of the sport hosting experience needs to be carefully thought through and meticulously planned in collaboration and in unison with all industry partners in the sport event ecosystem. A successful reboot of the industry demands it.

This study seeks to provide a summary of key lessons learned that other sport hosts can adopt and adjust to rebuild visitor confidence and trust in participating in, spectating and / or hosting international sport events. Some of the “go forward” considerations include:



**Government**



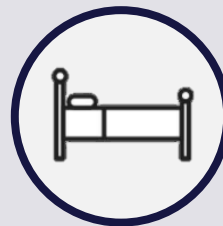
**Partners**



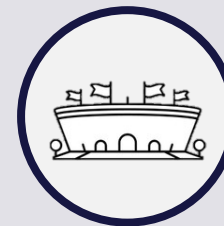
**Athlete  
Health & Safety**



**Transportation**



**Accommodations**



**Venues &  
Operations**



**Fan Engagement**

# Setting the Stage for Recovery via International Sport Events

Throughout this study, through both surveys and interviews with international event rights holders, it became clear that kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

## Government



- Do we have the full support of our municipal, regional, provincial and federal governments and public health agencies?
- Do we understand the public health protocol and quarantine requirements for international travellers?
- Have we engaged in the National Interest Exemption Process with the Government of Canada international athlete arrival, if applicable?
- How can we demonstrate the business case for the event and engage the entire business and sport community to make it successful?

## Partners



- How can contracts be structured to redistribute revenues to minimize the impact of no ticketing or “in-stadium” revenue?
- Where does the financial risk lie?
- How can we create new sponsor assets that will get the right attention and exposure without live spectators?
- How do we create direct B2C partnerships between local businesses and the athletes, coaches, etc.?
- What cost-effective and innovative ways can we connect stakeholders through technology?
- What are the new metrics that demonstrate “return on investment” and “partnership success”?

# Setting the Stage for Recovery via International Sport Events

Throughout this study, through both surveys and interviews with international event rights holders, it became clear that kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

## Athlete Health & Safety



- Have we developed “return-to-competition” protocol that meets public health guidelines and requirements?
- How closely are we working with the international event rights holder, the national sport organization, Canadian Olympic Committee or Own the Podium (where applicable) to leverage existing protocol and lessons learned?
- What is our approach to tracking athlete movement, daily symptoms, contact tracing?
- How will we employ technology to support athlete health and safety?
- What is our containment strategy if there are positive COVID cases among participants?

## Transportation



- What are the quarantine requirements for our event?
- Have we considered creating “departure hubs” from overseas to minimize widespread exposure?
- How can we work with our airline partners to facilitate chartered flights for participants?
- Once participants have arrived, what is our approach to getting participants around from the airport to the hotel(s) to the venues?

# Setting the Stage for Recovery via International Sport Events

Throughout this study, through both surveys and interviews with international event rights holders, it became clear that kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

## Accommodations •



- How can we work with hotel partners to secure an entire hotel for an event?
- How open are our hotel partners to adapting their operations to adhere to strict COVID protocols?
- How prepared are hotel partners for extended stays from athletes? (e.g., demand / quality of fitness equipment, stricter nutritional requirements, need for spaces to move around)?
- How have we structured our host contracts relative to accommodations? How much can we absorb additional cost if 2- or 4-person occupancy gets reduced to single occupancy for an event?
- What role can the local community play in rounding out the services offered to participants that the hotels can't offer?

## Venues & Operations



- How well coordinated are all the moving parts? Can we operate so that teams or athletes remain in their own bubble without crossing paths or risking exposure to other participants or staff?
- How are the venues organized? Competition field of play versus warm up and practice areas?
- What kind of venue / equipment sanitization is required to protect participants between different user groups?
- How prepared are the venues to implement security to minimize exposure and prevent non-participants from entering venues?
- How can the venues be organized into access zones?
- How prepared are we to create and enforce stricter accreditation by access zone?

# Setting the Stage for Recovery via International Sport Events

Throughout this study, through both surveys and interviews with international event rights holders, it became clear that kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

## Fan Engagement



- How can we create a positive sport event experience for participants, coaches, officials, and spectators through technology or other creative brand activations?
- How can we create and monetize video content and other digital assets?
- How can we maximize fan engagement with online and social media platforms?
- What opportunities are there to engage the eSports community in your international event?
- How can the sport event leverage the popularity of fantasy leagues and develop one for their own event / sport?
- How can you create interesting experiential brand activations in the host city (even if the participants are quarantined in a bubble)?
- How do we use fan engagement opportunities to pre-empt the restart of grassroots participation in sports?
- What role can an international sport event play in creating momentum for youth to join the sport post-COVID?
- What type of incentive program could you set up to reward fans that have been vaccinated?

There is no question that the international sport event sector has had to reinvent itself to find new business models and operational protocol that work in the current pandemic environment. In preparing for an economic reboot, international event rights holders and hosts will have to assess i) how they should continue to adapt to the current phase of COVID, ii) what they envision as the “new normal” post-pandemic.

# Industry adaptations to COVID-19 have created “a new normal”, one the sport tourism sector can anticipate is here to stay

Kick starting or maintaining an international event calendar would require dedicated effort, coordination, investment and collaboration from every major partner – from government to sponsors to athletes – to bring sport back safely.

While event adaptations have enabled some events to go ahead, the changes are not financially sustainable long-term. The entire sport event model, at least at the international level, is centred around ticketing, spectators, on-site sales, and sponsor activations. The primary and secondary research from this study, both qualitative and quantitative leads us to believe that the economic bounce back is approaching, but that the sport tourism sector will have to reinvent itself for the long-term creating a “new normal”.

**How do we prepare for successful event hosting in the current COVID environment? What changes can we anticipate when there is a sport hosting restart? How will visitor behaviour have changed for the long-term and how do we proactively prepare for the “new normal”?**

- 1 Safety First** > Host organizing committees and partners must put participant and spectator health and safety first. Developing expertise in venue set up, traffic flow, and COVID contingency plans will be necessary long-term. These standards are expected to become industry norm.
- 2 Focus on Relationships** > Whether hosting an event bubble or developing a sport hosting strategy through 2030, hosts must prioritize relationships in the local community, with all levels of government, and with the national and international sport federations to position themselves for success.
- 3 Rethink Revenues** > With the possibility of limited spectators for some time to come, hosts can move away from the reliance on ticketing and on-site sales to new sponsor asset development, creative brand activations, and monetization of digital content and fan engagement.
- 4 Individual Sport** > Individual sport has proven more easily adaptable to COVID restrictions and protocols. Focusing on individual sport will allow hosts to bounce back sooner and stronger, while also gaining the operational experience to host larger team sport events safely.
- 5 Creative Facility Adaptations** > Facilities will continue to be central to COVID recovery in the short- and long-term. Whether reviewing traffic flow inside the facility or upgrading HVAC, communities nation-wide will be reassessing facility features, safety, and suitability for events. But what about facility development for “rapid repurposing”? From recreational to competitive sport events, to hosting concerts in parking lots, driving maximum usage and ROI is key.
- 6 Fan Engagement Online** > For more than a year, fans have been engaging with their sports teams and favourite events online. From digital content to fantasy leagues, consumer behaviour has been altered by COVID, creating interesting opportunities for new partner agreements and sport delivery.



# Appendix I

## COVID Protocol Best Practices

Over the course of this study, the team identified a number of COVID-19 protocol that were being highlighted as innovative and / or effective for both domestic and international sport events. Knowing that other events have successfully implemented these protocol is a great first step to getting our events back on track. Participant health and safety must be at the forefront of any sport event operations during the pandemic.

# COVID-19 “Return-to-Competition” Protocol



## Spectators wearing masks

A cost-effective way for event organizers to continue to have fans in the stands while having an extra layer of protection between fans. [Masks required for basketball fans at Ole Miss](#) (Clarion Ledger, December 2020)



## Consecutive COVID tests prior to competition / throughout the season

Rapid tests are being processed within hours pre-departure and post-arrival, shortening the requirements for a 14-day quarantine. [Participants of the TCS New York City Marathon will have to provide proof of a negative COVID-19 test prior to competition](#). (Sports Travel Magazine, May 2021)



## Coaches wearing masks

A practice that has been adopted by most teams from grassroots to professional, many leagues mandating it and in some cases handing out fines if masks are removed. [NBA mask mandate for coaches, athletes and other sideline personnel](#). (Bleacher Report, January 2021)



## Health questionnaires

Teams are not taking any chances with athletes. The most basic form of data collection is just to ask athletes directly. Regular collection of information about athlete health is one approach to helping stop COVID spread among athletes and the team staff. [The Canada Premier League's \(CPL\) athlete screening tool](#). (Kindduct, n.d.)



## Athletes wearing masks

Primarily implemented in indoor sports as an extra level of protection between athletes. [Ontario Volleyball Association makes wearing masks mandatory while playing, even during games and competitions](#) (Ontario Volleyball, November 2020)



## Rapid testing

Rapid tests can deliver results within a matter of minutes and it is an effective way to prevent a person infected with COVID-19 from coming in contact with others. [Portable, rapid-testing units grease wheels in Calgary curling bubble, Canadian sport](#). (The Canadian Press, March 2021)

# COVID-19 “Return-to-Competition” Protocol



## Contact tracing

Collecting contact information of all athletes, spectators, team personnel, and facility employees so they can be notified if someone they came in contact with tests positive for COVID-19. [2021 World Men's Curling Championship on hold, initiates contact tracing](#) (Curling Canada, April 2021)



## Wearable technology to assist with the detection of early signs of COVID-19

Wearable technology provides personalized health and sleep insights. When worn regularly, athletes can identify if their heart rate or sleeping pattern changes, which could help them in identifying a possible COVID-19 infection. [World Surf League partners with Oura](#) (World Surf League, April 2021)



## Limiting who athletes can see and providing testing to people in their immediate circle

Some events are creating specific accreditation zones and “bubbles” within the venues to minimize exposure. [Seattle Seahawks restrict who their athletes can see and provide testing to the people in the athlete's immediate circle](#) (New York Times, February 2021)



## COVID Liaison Officer / Infection Control Officer / Chief Medical Officer

COVID Liaison Officers are required to have all up-to-date knowledge on the rules related to COVID-19 for the tournament they are working. They provide insight and guidance into what activities a team should avoid doing if they want to avoid fines or other repercussions from the organizing committee. [Tokyo Olympics require COVID liaison officers](#) (Aljazeera, February 2021)



## Electronic devices tracking proximity to others / potential COVID exposure

By using a tracker imbedded in a bracelet or an app on a person's phone the amount of time a person spends within two metres of another person can be tracked. The data can then be used for contact tracing if a member of the tests positive for COVID-19. [NBA usage of electronic tracking devices](#) (SportsNet, January 2021)



## COVID Detector Dogs

Similar to having dogs to detect firearms, dogs could be trained to detect COVID-19 in humans. Having a COVID-19 detector dog at the entrance to every sport venue could help event organizers to reduce the risk of exposure. [Study suggests that dogs can be trained to detect COVID](#) (CNN Health, December 2020)

# COVID-19 “Return-to-Competition” Protocol



## Temperature check pre-entry to a sport facility

Checking a person's temperature is a quick and clear way of determining if someone is in good health. Having an elevated temperature is one of the more common symptoms of COVID-19 and even if a person does not have COVID but has a fever, it is usually a good idea for them to stay home. [IIHF World Junior Hockey Championships hosted in Edmonton bubble conduct daily testing and temperature checks](#) (CBC, January 2021)



**"Baseball style" match-ups to reduce travel**  
Teams play against the same opponent a couple of times in one trip and against multiple teams in the region to minimize travel. [2020-21 NBA season format](#) (ESPN, December 2020)



## Tournament bubble

Hosting a tournament in a “bubble” ensures that only required personnel are allowed in or around the sport venue. In some cases, meaning entire hotels or properties are bought out by event organizers so all event personnel can stay in one location. [Calgary hosted 6 major curling events in 2021 in the bubble format.](#) (Visit Calgary, n.d.)



## Complete team relocation

Some teams have had to completely relocate to different cities to be able to take part in the league they compete in. This can be due to the rules in their country/region do not allow visiting teams or so teams can be closer to reduce travel between cities, among other reasons. [MLS Toronto FC relocate to Orlando, FL](#) (CBC, April 2021)



## Regionalized competitions

To minimize contact with others, some competitions were only offered to participants that live in a specific region. Some leagues also divided up teams by region and teams only played other teams in their region for the entirety of the season. 2021 NHL Season will only play divisional games separated into North, East, Central, and West (CBS, January 2021)



### Reduced bracket size

Reducing the size of a tournament decreases the workload on tournament personnel and can be implemented to off-set the potential increased workload from implementing COVID procedures. [NCAA bracket sizes will be filled at 75% of their capacity](#) (NCAA, September 2020)

# COVID-19 “Return-to-Competition” Protocol



## Reduced number of games in a season

Due to a delayed start to the season or due to other host restrictions or protocol, some leagues are reducing the number of games in a season. [NHL reduces play to a 56-game season for 2021 – usually 82 games are played](#) (CBS, January 2021)



## Designated entrances and exits

By designating specific entrances and exits it decreases the probability of overcrowding and makes it easier to physically distance. [Curling Canada Calgary Hub creates access zones and designated separate entrances for athletes/coaches, host broadcast crew, and officials / volunteers / media](#) (CBC, December 2020)



## Reduced travel for games

Reducing travel for games decreases the risk of potential exposure for everyone involved with the sport. With some scheduling changes, it is one of the easier and more cost-effective changes to make. [The International Swimming League \(ISL\) chose to have their 2020 season hosted entirely in Hungary instead of have multiple host cities.](#) (Toronto Sun, September 2020)



## Automatic door openers

The use of automatic door openers decrease the number of touch points in a facility, decreasing the risk for potential exposure. [L.A. Rams COVID protocols including motion sensed doors](#) (NFL, July 2020)



## Enhanced cleaning measures (facility and equipment)

Enhancing cleaning measures of both facilities and equipment is crucial in helping to prevent the spread of COVID-19. Sanitizing high-touch surfaces frequently reduces the risk of the virus spreading between people. [NCAA Basketball Game Day Operations Basketball enhancing cleaning protocols.](#) (NCAA, n.d.)

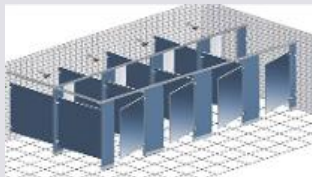


## One-way hallways / walkways

Use of one-way hallways or walkways make it easier to physically distance. [Move Imperial at Imperial College London re-opens the majority of its facilities with new measures in place](#)



# COVID-19 “Return-to-Competition” Protocol



## Full dividers between showers and lockers

Inserting floor to ceiling dividers in shower stalls so all showers can be used at the same time even though they are not two metres apart. [Seattle Seahawks installed dividers](#) (New York Times, February 2021)



## Larger meeting rooms to allow for physical distancing

When a minimum of two metres is required between people in a facility less people are able to fit into a space. Sport teams may need to reconfigure conference rooms or larger spaces in order to hold their team meetings. [Seattle Seahawks turn large rooms and practice fields into meeting areas](#) (New York Times, February 2021)



## Auxiliary locker rooms added

Adding additional locker rooms provides more opportunity for physical distancing. [Minor League Baseball Salem Red Sox add auxiliary locker rooms for visiting teams to use.](#) (The Raanoke Times, May 2021)



## Limited team meeting times

Limiting the length and frequency of team meetings reduces everyone's risk of exposure. [NBA prohibits any pregame meeting in locker rooms from lasting more than 10 minutes](#) (Sportsnet, January 2021)



## Upgrades to ventilation systems / installation of windows to increase airflow

COVID-19 is spread primarily through droplets in the air so having proper ventilation in facilities is a key component to decreasing the risk of exposure. [Seattle Seahawks upgrade ventilation systems](#) (New York Times, February 2021)



## More frequent handwashing / use of hand sanitizer

Good hand hygiene is a key component to staying in good health and people should avoid touching their face when their hands are not clean to reduce their risk of exposure to COVID-19. [viaSport outlines enhanced protocols for sport including increased hand hygiene](#) (viaSport, December 2020)

# COVID-19 “Return-to-Competition” Protocol



## Assigned seating for athletes and team staff

Despite many teams operating inside bubbles, some leagues have chosen to spread out players, making use of empty front-row seats and creating extra opportunity for sponsor exposure. [NCAA Basketball Game Day Operations Basketball enforces assigned seating](#) (NCAA, n.d.)



## No / minimized singing or chanting

Singing and chanting has the potential of producing more droplets into the air which can increase the risk of transmission of COVID-19, [English Premier League fans are told not to sing or chant at matches](#) (The Guardian, December 2020)



## Having vaccinated frontline / healthcare workers as spectators

In support of frontline workers and to promote the importance of vaccination to the country re-opening, some leagues are restricting spectators to vaccinated health care workers only. [Super Bowl LV sees 7,500 vaccinated healthcare workers attend as fans](#) (NFL, February 2021)



## Staggered entry into stadium

Staggered entry times makes it easier to physically distance as there are less people attempting to get into the stadium at one time. Not only are there less people waiting outside to get in but it allows those who have already entered a chance to find their seat before others have entered. [English Premier League fans will enter stadiums at staggered arrival times](#) (Sport Bible, August 2020)



## Reduced number of / no spectators at games

Reducing the number of spectators allowed at a sporting event is essential to maintaining physical distancing at an event. Having no spectators is the safest option as with less people in the facility equals less risk of potential exposure for everyone. [2021 Australian Open reduces fan capacity by just under 50% of typical capacity](#) (ESPN, February 2021)



## Limiting the number of athletes and team personnel allow on the field / court

By requiring there be two metres of distance between people at all times means there is less space available on the sidelines for teams. Also, by reducing the number of people who have close contact with team personnel reduces the risk of exposure. [NHL restricts team executives, such as owners, and presidents, from having direct contact with coaches and players at all times](#) (Providence Journal, December 2020)

# COVID-19 “Return-to-Competition” Protocol



## Buying out hotels in host cities so teams can bubble

Having entire hotels dedicated to the participants of a tournament greatly decreases the risk of potential exposure to COVID-19. In some cases this can also be of benefit to the hotels as well, as they are likely seeing a decrease in business due to the pandemic. [NCAA bought out hotels for March Madness teams in order to minimize the possibility of contact with outside parties](#) (Sporting News, January 2021)



## One athlete per hotel room

This is done as a preventative measure in the case of an athlete testing positive for COVID-19. If an athlete does end up testing positive they can easily quarantine in their room without needing to displace anyone else. [NCAA March Madness assigns one athlete per hotel room and instructs athletes not to invite guests into their rooms](#) (Sporting News, January 2021)



## Securing extra hotel rooms while on the road in case of an outbreak

If athletes, coaches, or other team support staff are sharing rooms, they must have extra hotel rooms booked in case someone from the team test positive for COVID-19 and they need a place to quarantine. [Tokyo Olympics working to secure 300 hotel rooms near Athlete's Village in case of COVID-19 symptoms](#) (CBC, April 2021)



## Players only allowed at their sport venue and their home/hotel throughout the season

By limiting the places athletes are going decreases the chances of them being exposed to the virus. [Athletes competing in the WHL are advised that they should be going from their home, to the rink, and then straight back home.](#) (CBC, 2021)



## Use of private airports for transportation

By using private charter flights to private airports teams can greatly decrease their risk of potential exposure. There is no room to physically distance on a commercial flight and while airlines take every precaution they can, there is still a possibility someone on the flight has been exposed to COVID-19. [NCAA March Madness teams traveling by charter aircraft will only use private airports](#) (Sporting News, January 2021)



## Physical distancing while in transit

Traveling to and from the venue by bus is another example of people being in an enclosed space with limited opportunity for physical distancing. Having multiple buses for the team allows for more opportunity for physical distancing. [March Madness teams will be assigned three buses each for their 34-person groups to ensure physical distancing](#) (Sporting News, January 2021)



# COVID-19 “Return-to-Competition” Protocol



## Fines or impact on participation for not obeying the rules

Sometimes not everyone will follow the rules, so imposing fines or sanctions on participants and fans may be necessary to keep everyone safe. [Curling Canada will impose strict penalties / punishments including potentially missing the 2022 Beijing Olympics should anyone step outside of the Calgary bubble](#) (CBC, December 2020)



## Return to play plan for after contracting COVID-19

Before a person can return to their sport or being around the team they must no longer be at risk of spreading the virus. Waiting 10-14 days after symptoms have subsided and testing are some of the ways teams decide when it is safe to return [Sport Northern Ireland Return to Sport Considerations](#) (Sport Northern Ireland, August 2020)



## Contingency planning

There is no clear end to the COVID-19 pandemic so organizations and organizing committees need to be prepared to adapt if they still want to run their event(s). [Paris 2024 creating contingency plan to host Olympics even if the COVID-19 pandemic is still ongoing](#) (CBC, February 2021)



## Ordering food through a phone app instead of standing in line for the cafeteria

Ordering through an app or other online tool decrease the amount of face-to-face interaction between people. Using this method can decrease a person's potential risk of exposure. [Seattle Seahawks ordered food via phone app and asked hotel kitchens to use the app as well](#) (New York Times, February 2021)



## Limiting the number of people allowed to travel with the team

Limited hotel and field/court space means that teams may not be able to bring as many people with them to games/tournaments. Some organizing committees have put a blanket cap for all teams to make it fair for everyone. [The NCAA restricts the number of people allowed to travel to the 2021 March Madness tournament to 34 per team](#). (Sporting News, January 2021)



## Cancellation or postponement of games

In cases of large events such as multi-sport games or world championships event organizers may have no choice but to cancel because of the restrictions in their region. Other event organizers choose to cancel as they wish to maintain a similar atmosphere that existed pre-pandemic and feel they can't do that under COVID-19 restrictions. [Canada Summer Games postponed until 2022](#) (CBC Sports, September, 2020)

# Appendix II

**Methodology**

**Acknowledgements**

**Contact Information**

# Methodology

Sport Tourism Canada (STC) conducted this study in an effort to provide meaningful, actionable insights into the current state of sport hosting and sport tourism in Canada specific to international sport events and to provide the information and insights that will restore the confidence of participants, spectators and communities in sport event hosting by drawing on leading practices and industry case studies from around the world.

This study was conducted with international and continental sport federations as well as private event rights holders around the world. A survey was developed by Sport Tourism Canada and deployed to the STC contact list through direct email. These efforts were further supported and amplified by the project team and their direct relationships within the industry to conduct interviews with key industry stakeholders.

## SURVEY DETAILS

<b>Total Responses</b>	<b>30</b>
<b>Market</b>	<b>International</b>
<b>Method</b>	<b>Online</b>
<b>Questions</b>	<b>40</b>
<b>Average LOI</b>	<b>15 minutes</b>
<b>Languages</b>	<b>English</b>
<b>Field Dates</b>	<b>03/10/2021 – 04/08/2021</b>



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