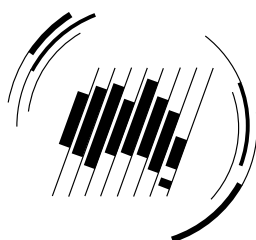


TOWARDS A NATIONAL SPORTS TOURISM STRATEGY

Draft



**INDUSTRY
SCIENCE
RESOURCES**

Sport and Tourism Division

Towards a National Sports Tourism Strategy (Draft)

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EXECUTIVE SUMMARY

Background

Tourism has in recent decades become firmly established as a major Australian industry, providing significant economic and employment benefits. It accounts for 8% of employment, 5.8% of Gross Domestic Product and nearly 15% of export earnings. Forecast growth, especially for inbound tourism, is very strong.

Similarly, the sports sector has a major economic impact, contributing billions of dollars to the economy and employing tens of thousands of Australians. Furthermore, sport occupies a central place within Australian culture and identity, based on a long history of achievement across a wide range of sports.

It is not surprising then that travel for the purpose of participating in some manner of sporting activity is both significant and growing – in Australia and worldwide.

The Key Elements of the Strategy

The aim of the Strategy is to facilitate a viable and internationally competitive sports tourism industry which can maximise its contribution to Australia's economic and social wellbeing, especially in regional Australia.

The draft Strategy identifies a number of issues that impact on the development of the sports tourism industry, and discusses developments in these areas and possible actions. The issues include: industry coordination; education and training; government regulation; sport and tourism infrastructure; evaluation of the economic benefits of sports tourism; research and data; and Strategy implementation.

What is Sports Tourism?

Estimates of the size of the sports tourism sector vary, mainly because there is no single, agreed definition of what constitutes "sports tourism". While definitions of tourism are well accepted and fairly consistent throughout the world, definitions of sports tourism range from narrow ones involving travel solely for participation in competitive sporting activity to broader definitions where the "sporting" activity might be more leisure or adventure activity incidental to the main purpose of travel.

For the purposes of developing a National Sports Tourism Strategy, a relatively narrow definition has been adopted. It is:

- Domestic sports tourism: any sports-related trip of over 40 kms and involving a stay of at least one night away from home; and
- International sports tourism: any trip to Australia a prime purpose of which is to participate in a sporting activity, either as a spectator, participant or official.

The sport or sporting activity under this definition are organised activities – unstructured activities undertaken by individuals have been excluded, as governments' ability to influence such activities is relatively limited.

Under such a definition, it appears that sports tourism in Australia might represent about 5% of the overall tourism market, equating to tourism expenditure of about \$3 billion per annum.

Tourism and Sport – The World and Australian Markets

Tourism and travel have grown to become not only one of Australia's, but also one of the world's most significant industries. The World Tourism Organisation predicts that global international tourism, which in 1999 generated, directly and indirectly, 11% of global GDP, will expand by 4.1 per cent per year over the next two decades. Australian international visitor arrivals are predicted to grow more quickly at around 7 per cent per year through to 2008. Based on these predictions, tourism is destined to continue playing a vital role in Australia's economic and social development.

Accompanying the growth in tourism has been a significant expansion in the worldwide sport and recreation industry. These industries come together in the sports tourism sector, and with the emergence of "niche" markets as a major factor in tourism development, the potential for growth in the sector is considerable.

Apart from economic factors, notably increases in disposable income, there is a range of other factors influencing the future growth. These include: continuing increases in the number of sporting events and accompanying media exposure; increased professionalism in sport and consequent demand for training camps; the growth of mass participation events such as Masters Games; and the growth in "manufactured" events – both made for television and made specifically to help promote tourism to a region.

Opportunities for Australia at the International, National and Regional Levels

The hosting of the Sydney 2000 Olympics also provides Australia with a unique opportunity. Apart from showcasing Australia to the world, both as a tourism destination and as a country with the ability to successfully stage major sporting events, the Olympics will leave a legacy of expertise in a range of sports-tourism related fields as well as a legacy of world-class sporting venues. The challenge for sports tourism development is to take advantage of all the opportunities this presents.

Industry Coordination

Sports tourism opportunities, and especially the tourism benefits, are sometimes lost or not maximised because the linkages between the sports and tourism sectors are not well established.

Sporting activities, especially events, have historically been organised by sporting organisations for purely sporting purposes. Maximising the tourism potential of the events has often not been a major consideration for the organiser, representing a potential failure of the market. Further, many sporting organisations rely on volunteers, and may not have well developed business or organisational skills or experience. Both of these factors can lead to lost tourism opportunities.

To overcome this, better linkages need to be established between the sporting and tourism groups at all levels – regional, state/territory and national. Regional "sports tourism clusters" provide a model for building these linkages at the local level. Similar groupings at state and national levels would also be beneficial.

While the State and Territory events units are working to improve linkages, there may be a role for the Commonwealth to disseminate information and take on a coordination and facilitation role at the national level.

Education and Training

Education and training is critical to the success of both the sports and tourism sectors. For sports tourism, the issue of education and training is especially important in ensuring that sporting bodies in particular have the requisite business skills both to run successful events and to recognise and take advantage of the tourism opportunities which accompany the hosting of those events. While training in this area is certainly available, there may be an issue with ensuring such training is appropriate to the needs of the sector and is affordable and accessible.

Regulatory Issues

Government regulation can and does impact on the sports tourism sector – at the local, State/Territory and Commonwealth levels. This can range from the need to obtain permits for road closures etc at the local level, to visa requirements for international athletes or international visitors generally, involved in a sporting activity. It is important to try to minimise any adverse impacts of such regulation.

A basic problem for many organisers is simply trying to deal with what can seem like a maze of different agencies with differing requirements. While some States/Territories have developed information kits to help address this issue, the Commonwealth could also play a major role in assisting organisers to navigate through this maze.

Infrastructure

Most if not all sporting activities and events rely on there being appropriate infrastructure in place. The most obvious form of infrastructure is the sporting facilities themselves, however other infrastructure is often more important if sports tourism opportunities are to be maximised.

Adequate accommodation and transport are often critical to the success of events where large numbers of people may need to be moved and accommodated. This can provide difficulties in regional areas, where accommodation may be in short supply and where transport links, both to and within a region, may be expensive and/or suffer from inadequate capacity.

A starting point in addressing these issues, and one which the Commonwealth and a number of States and Territories have already embarked on, would be to conduct facilities audits to identify just what sporting facilities and at what standard, are available. A further logical step down this track would be to conduct a broader “asset audit” of all relevant infrastructure, to assist organisers in assessing the ability of a region to support a particular sporting activity or event.

Research and Data Collection

Like many niche tourism sectors, the sports tourism sector suffers from a lack of reliable data on which to base strategic decision-making. Even data which might help measure the size of the sector is not readily available. Indeed, there is no agreed definition of just what constitutes “sports tourism”, hence any discussion of research and data needs must start with the need to come to some consensus as to just what “sports tourism” comprises.

Limited data is available from the major tourism surveys - the International Visitor Survey and the National Visitor Survey. At best, however, the picture they draw is very partial but does indicate that sports tourism is significant in the overall tourism market.

A further issue is that most of the available research tends to focus on individual events and not on improving our overall understanding of the sports tourism market and how it operates at a national or regional level.

Evaluation of Events

There are numerous “models” employed to evaluate events which can lead to different outcomes and a consequent inability to compare results. A more consistent methodology, and in the case of smaller regional events, a simplified methodology, would be of considerable benefit.

The Cooperative Research Centre for Sustainable Tourism, through its events sub-program and its recently established sports tourism “node”, may be able to better coordinate activity in this area, and help provide a more “macro level” focus.

Australia can learn from international experience in the sports tourism field. The United Kingdom, through the British Tourist Authority, has developed a sports tourism marketing strategy and has recently appointed a sports tourism coordinator in their Sydney office. Canada has been pursuing a program of developing sports tourism “clusters” or networks in regional areas, to bring together relevant players, raise awareness and maximise tourism benefits. South Africa also has identified sports tourism as a growth sector.

Implementation

Successful implementation of a national strategy will require a concerted and coordinated effort from a range of organisations, including governments at all levels (Commonwealth, State/Territory and local), the tourism industry, the sports sector including national and state/territory sporting organisations and researchers.

At the State/Territory level, State departments and events corporations take on much of the responsibility for building these links. At the local level, there may be a greater need for development of networks or “clusters” focussing on sports tourism development. At the national level, there may also be a need for better coordination.

Conclusion

Clearly, sports tourism in Australia has enormous potential. A number of factors, including strong inbound tourism growth, a sporting culture, good sporting and tourism infrastructure, and the catalytic effect of the Sydney 2000 Olympic Games, are combining to make this a key growth area. The challenge is to maximise that growth in a manner that can provide genuine economic and social benefits for Australia and Australians.

This draft Strategy poses a number of questions, with the aim of identifying key measures which would need to be implemented to facilitate growth of the sports tourism industry.

BACKGROUND

The development of the National Sports Tourism Strategy has its genesis in the *National Action Plan for Tourism*. The Plan, released in 1998, provides a policy framework for the future growth of the tourism industry in Australia. It identifies the development of a range of niche tourism products as one of the avenues which will promote strong future growth and diversification of the industry, and identifies sports tourism as one of the sectors showing enormous potential for further development.

In November 1999 the Federal Minister for Sport and Tourism, the Hon Jackie Kelly MP, announced the Government's intention to develop a National Sports Tourism Strategy in recognition of the need for a planned and consistent approach to building a larger sustainable base for the sports tourism sector.

The development of the Strategy to date has involved extensive consultation with a wide range of stakeholders; desk research; the production of a preliminary discussion paper; and the organisation of a series of focus group workshops around Australia. Details of the Strategy development process are set out in **Appendix 1**.

Why Develop a National Sports Tourism Strategy?

In the past decade tourism has been firmly established as a major industry in Australia, economically, socially and as a job provider for Australians. In 1996-97, tourism directly accounted for 5.8% of expenditure on Gross Domestic Product (GDP). Growth in the tourism industry is forecast to continue well into the next decade, especially for international tourism, with the Tourism Forecasting Council predicting that international visitor arrivals will grow at an average annual rate of 7.3 per cent to 2008 when we will welcome 8.4 million visitors. In 1999, international tourism to Australia generated export earnings of \$17 billion and accounted for 14.9% of Australia's total export earnings. Expenditure derived from domestic tourism was \$44.8 billion in 1998-99.

Sport has always been an integral part of Australian life and it is increasingly being recognised that sporting events and activities have the potential to be a major tourism drawcard. Australia has something of a natural advantage in this niche market given our strong international image as a sporting nation. This reputation is largely based on the achievements of our sports men and women and images from international events held here. It also forms part of the Australian "lifestyle", an experience which is consistently rated as a major motivating factor in bringing international visitors to Australia.

The popularity of sports events, which constitute a significant proportion of all events held in Australia, guarantees that they are a major component of tourism agencies' strategies for destination development. For the Australian Tourist Commission (ATC), the promotion of Australia as a destination for a holiday featuring sports activity is a logical development of Australia's strong sporting image and the ATC has incorporated a "sports" theme in its overseas marketing.

Sports tourism, or tourism which is associated with sporting activity, therefore has the potential to develop into a highly significant niche sector which provides Australia with economic and social benefits.

The hosting of the Olympic Games in Sydney in 2000 is undeniably a definitive moment for sports tourism in Australia and has the potential to bring significant ongoing benefits to the Australian tourism sector. While mega-events of this ilk are definitely not the "bread and butter" of sports tourism, the Olympics will provide many lessons in organising, running and

capitalising on the tourism benefits of sporting events. We need to ensure that Australia obtains every possible advantage from hosting this one-off special event, in order to build a more sustainable base for the long-term future viability of the sports tourism sector in Australia.

The remainder of this document constitutes a draft sports tourism strategy aimed at eliciting comment from interested parties prior to its finalisation.

1. THE KEY ELEMENTS OF THE STRATEGY

The aim of the strategy is to facilitate a viable and internationally competitive sports tourism industry and to ensure that the benefits of this niche market are maximised and spread widely throughout Australia. This objective has been identified because of the perception that the tourism benefits which sporting activities and events can provide are not currently being maximised. The strategy identifies *opportunities* for the development of the sports tourism sector as well as identifying and addressing *impediments* to the growth of the industry.

The key elements of the strategy are a range of possible actions which can help to:

- Improve the coordination and competitiveness of the sports tourism industry
- Identify and address education and training issues for the industry
- Minimise the impact of regulatory issues (e.g. visas, customs) on the industry
- Identify and address the infrastructure requirements of the industry
- Identify and address the research and data collection requirements of the industry
- Improve the means of evaluation of the economic benefits of sports tourism.....
- Coordinate the implementation of the strategy

2. WHAT IS SPORTS TOURISM?

Sports tourism is a niche market which can be broadly described as a tourism activity generated by participation in sporting activity. That activity can be a sporting event or competition, a tour of a sporting facility, or a training camp. Participation might involve being a competitor/participant, official, or spectator. The Australian definitions of international and domestic tourism are well understood and accepted and are used as the basis for the definitions of sports tourism adopted for the development of this Strategy. These are:

- Domestic sports tourism: any sports-related trip of over 40 kms and involving a stay of at least one night away from home; and
- International sports tourism: any trip to Australia a prime purpose of which is to participate in a sporting activity, either as a spectator, participant or official.

As to what constitutes a sporting activity in this context some decisions need to be made in relation to activities that could be seen more as recreational (eg fishing, golf, skiing, horse-racing) and also to adventure activities (eg sky surfing, para-sailing, rock-climbing, etc). All of these activities require skill and also offer potential for competition, however they are also frequently pursued by individuals in an unstructured way and maybe entirely incidental to their main reason for travelling.

While this may not matter in some respects, structured, organised sports events, tours, camps and so on arguably offer more potential for industry and governments to target with a view to increasing the tourism potential, than do leisure and adventure activities – important though they are in their own right. It is therefore those activities which can be targeted for further development which are included within the ambit of this Strategy.

An overview of various definitions of sports tourism is set out at **Appendix 3**.

3. TOURISM AND SPORT - THE WORLD MARKET

Tourism

Tourism and travel make up one of the world's largest industries. In 1999 the World Travel and Tourism Council (WTTC) also reports that across the global economy, travel and tourism generates, directly and indirectly:

- 11% of GDP;
- 200 million jobs;
- 8% of total employment; and
- 5.5 million new jobs per year until 2010.

World Tourism Organisation (WTO) data for 1999 show that 663 million people spent at least one night in a foreign country, up 4.1 per cent over the previous year. Spending on international tourism reached US\$453 billion — a growth rate of nearly 3 per cent over 1998. These results are in line with WTO's long-term growth forecast *Tourism: 2020 Vision* which predicts that the tourism sector will expand by an average of 4.1 per cent a year over the next two decades. Annual international arrivals are expected to surpass one billion by the year 2010 and reach 1.6 billion by the year 2020.

Reasons for this sustained growth include greater disposable income in tourism generating countries, and, especially in some of the emerging economies of Asia, more leisure time, earlier retirement, improvements in infrastructure and transport (particularly air transport), and changes in consumer spending preferences.

Sport

Sport and active recreation have become very large and successful industries worldwide. A 1994 European Commission Report on the European Community and Sport estimated that the sports industry is responsible for 2.5 per cent of world trade.

The factors influencing the growth of sport and recreation are similar to those influencing tourism growth - notably increased disposable income, greater availability of leisure time and changing consumer preferences. An increased awareness of the benefits for all ages of greater physical activity has also been important.

In addition, the role of the media in promoting sports has been critical. A number of factors have contributed to this greater international media attention on sport and recreation, especially in western economies:

- increased demand for sports programming from television broadcasters to meet consumer demand, the advent of dedicated sports channels (eg. Fox Sports, ESPN, C7 Sports), and the availability of satellite technology allowing live coverage;
- increased prominence of professional sportspersons across a range of sports, e.g. golf, tennis, basketball, baseball, surfing, rugby and soccer;
- large amounts of money being spent by corporations directly and indirectly sponsoring events, teams and individuals for commercial advantage;
- sports associations becoming more like large-scale business enterprises;
- growth of merchandise associated with particular sports, sporting activities and sporting teams;

- significant advertising, promotion, and activity associated with high-profile international sporting events, e.g. the Olympic Games, soccer World Cups, Grand Slam tennis, Formula One Grand Prix, and national sporting competitions;
- increasing opportunities for participation, especially in western economies, through changing leisure patterns, ageing of the population, increased disposable income, and increased awareness of the benefits of physical activity

Sports Tourism

Having regard to the trends emerging in both the tourism and sports sectors, it is not surprising that significant growth is also occurring in travel for sports related purposes. In fact, this growth is also linked to another trend – that of travelling for specific “niche” purposes, of which sporting activity is one.

The British Tourist Authority and English Tourism Board claim as many as 20 per cent of tourists trips are for the prime purpose of sports participation, whilst up to 50 per cent of holidays include incidental sports participation. This level of activity is broadly consistent with Canadian data, with the 1998 Canadian Travel Survey finding that 37% of domestic trips that year were for sports-related purposes. In the case of the United States, the Travel Industry Association of America found that in the past five years, 38 per cent of US adults attended an organised sports event, competition or tournament as either a spectator or participant, while on a trip of 50 miles or more. These figures are based on rather broad definitions of the “sport” in sports tourism.

Significantly, perhaps, the sports market, and hence the sports tourism market, is becoming increasingly internationalised. As previously mentioned, the availability of sports-only TV channels which display sports from numerous countries around the world, as well as increasing coverage of an ever-expanding range of sporting events through more mainstream media outlets, means there is an increasing awareness of the range of sporting activities being pursued around the world, including in countries such as Australia.

4. TOURISM AND SPORT - THE AUSTRALIAN MARKET

Tourism

Tourism has grown to be one of Australia's most significant industries. While a small player in terms of world arrivals, Australia is a major tourism destination in terms of tourism receipts, ranking 12th in the world for 1999.

In 1996-97, tourism accounted directly for 5.8% of expenditure on Gross Domestic Product (GDP), and was directly responsible for the employment of over 670 000 persons and indirectly for a further 290 000. This accounts for 11.5% of total Australian employment.

In 1998/99, expenditure derived from domestic tourism was \$44.8 billion. In 1999, international tourism to Australia generated exports of \$17 billion and accounted for 14.9% of Australia's total export earnings.

Tourism is destined to continue playing a vital role in Australia's economic and social development. The Tourism Forecasting Council (TFC) predicts that international visitor arrivals will grow at an annual average rate of 7.3 per cent to 2008 and generate nearly \$32 billion in export earnings in 2008. This means international visitor number in excess of 8.4 million in 2008 - almost double the current level of tourist visitation to Australia. Much higher levels of growth are predicted from emerging Asian markets including China (21.1 per cent), South Korea (23.7 per cent) and Thailand (18.3 per cent). On the domestic front growth is anticipated to be steady with an average annual growth rate of 1.6 per cent for the period 1998-99 to 2008-09.

Sport

Australia has long been regarded as a sporting nation. Significant interest by the Australian public in sports of one type or another across wide demographic boundaries ensures that the sport industry in Australia assumes a significant economic, social and even political profile.

Involvement in sport and sporting activity not only benefits both the health and general well-being of our nation, it also makes a sizeable contribution to the Australian economy. Precise figures are extremely difficult to find – a problem for sports tourism also, and one which is discussed later in this strategy. What is clear is that the sports sector generates many billions of dollars within the economy and provides employment for tens of thousands of people.

Despite its size and significance, many sectors of the industry are not highly commercialised, although some, such as the businesses supplying goods and services which support sporting activities, are very commercially focussed. There is a large “not-for-profit” segment of the sports sector, exemplified by the number of volunteers working within it. In 1994/95 there were 112,877 volunteers working in the sports industries which was almost double the formal employment in sports industries at that time. The majority of these volunteers (89 per cent) worked within the sports, or in the provision of services to sports, sectors.

Structurally, the sports sector is very decentralised. An important part of the sector is the local sporting club - bodies dedicated to the development of single sports run by and for its members. These clubs often affiliate with regional and state associations which, in turn, unite to form National Sporting Organisations (NSOs). Volunteers administer sport at all levels - particularly the club level. At state and national levels professional administrators begin to play a role, although even here volunteers may still make a significant contribution.

Professional clubs also exist in parallel with this system in the major sports like the football codes, basketball, cricket and baseball. They belong to state or national leagues and are managed predominantly by full-time professional administrators and coaches.

Special purpose associations exist to promote particular interests such as sports medicine, coaching, school and university competition, physical education, legal issues and professional development for sports workers. These usually affiliate with an umbrella body which operates at the national level.

Government involvement in sport occurs at each of the three levels of government - local, state and national, through the various departments dealing with sport and recreation, the Australian Sports Commission, the Australian Institute of Sport, and the State Institutes of Sports and Academies. There are also a range of non-government organisations which administer, coordinate and promote particular interests at both state and national levels.

Within the government sector, there are a number of vehicles for seeking to discuss and coordinate issues relating to sport industry development. The Sport and Recreation Ministers Council (SRMC) is the peak body for discussion between the Commonwealth and State and Territory Governments for issues concerning sport and recreation needs across Australia. It is supported by the Standing Committee on Recreation and Sport (SCORS), whose members are senior officials in the sports departments of each State and Territory.

The Commonwealth Government has also given recognition to the many commercial businesses which service Australian participation in sport, through the development of a strategic plan to facilitate the growth of the commercial sports and leisure services sector.

Sports Tourism

Both the tourism industry and the sports industry in Australia come together in the sports tourism sector. Those involved include sport and tourism departments; major events corporations; sporting bodies; facilities managers; event organisers and promoters; tour operators and accommodation providers; transport operators; retailers; and the full range of organisations providing goods and services to both sporting and tourism operators.

However, not all of these groups necessarily perceive themselves as being part of a broader sports tourism industry, resulting in potential lost opportunities associated with the staging of Australia's many and various sporting events.

While it is difficult to establish the size of the industry, some efforts have been made to quantify its value to the Australian economy.

For example, during the focus group process forming part of the development of this draft strategy, a number of participants suggested that the sector accounts for about 5% of the total tourism market, based on the relatively narrow definition proposed in the Strategy. If this is the case across both international and domestic tourism, sports tourism in Australia would account for annual expenditure of about \$3 billion per annum.

This estimate is consistent with analysis undertaken by the Bureau of Tourism Research and published in the recent paper *Sports Tourism: An Australian Perspective*, which found that 6 per cent of day trips and 5 per cent of overnight trips taken by Australians in Australia, were taken with sport as the primary motivation. This corresponds to expenditure of \$1847 million by domestic sports tourists, of which \$461 million was on day trips and the remaining \$1386 million was spent on overnight trips.

Australian domestic sports tourists appear to generate a higher dollar yield than other domestic travellers, with 31% staying in hotel, resort, motel or motor inn accommodation on their sports trip compared with 23% for all domestic travellers. Consequently, their estimated average daily expenditure of \$130 is higher than the \$112 estimated for other domestic travellers.

5. OPPORTUNITIES FOR AUSTRALIA AT THE INTERNATIONAL, NATIONAL AND REGIONAL LEVELS

Australia has many competitive advantages in the sports tourism marketplace, including a climate conducive to outdoor activities, a diverse range of sporting activities, access to quality sports facilities, well developed tourism infrastructure and an internationally renowned image as a sporting nation and tourism destination.

Even the fact that our seasons are the reverse of those in the major tourism source markets of the Northern Hemisphere provides a range of opportunities in areas such as pre-season training camps. Similarly, our expertise in areas such as sports science and sports medicine, as well as leading edge facilities such as the Australian Institute of Sport, help to encourage international sporting teams and individuals to travel to Australia.

These assets form the basis for an internationally competitive tourism product. However they have to be managed in a way that delivers the maximum benefits for the country as a whole.

While there are numerous opportunities within the broader sports tourism fields, some sectors and some markets appear to have particular potential for Australia to exploit.

International Opportunities

The Olympics

The sport mega-event is the most widely recognised example of sports tourism. And, with mega-events such as the Olympic Games and the World Cup Football it is not surprising that they involve the largest volumes of spectators and the largest revenues of all special events and festivals.

The value of hosting an Olympic Games has been the subject of much research with wide ranging views on the benefits and costs of such an event. A significant increase in tourism is not a guaranteed certainty with many impacts dependent upon the organisation and marketing of the Olympic Games. Regardless, the staging of an Olympic Games is recognised as being a unique opportunity for the host city and country to engage in high-profile promotion their tourism products at a worldwide level.

Development of international standard sporting facilities, and the upgrading of facilities required for pre-Games training, is both an obvious and tangible legacy. High quality facilities combined with a successful hosting of the Olympics will give Australia a head start in bidding for major sporting events in the years immediately following the Games.

It is also in these years that the Tourism Forecasting Council predict Australia will receive a major tourism benefit from the Olympic Games with additional international visitor numbers of 342 000 in 2000, 335 000 in 2001 and 350 000 in 2002. If these numbers are realised, and they may well be, Australia will have received an immediate and major dividend from the hosting of the Games. Many of those additional visitors will no doubt participate in sporting activities while in Australia.

Just as importantly perhaps, the lessons that have been learned by governments, sporting bodies and business will play a major role in the further development of the sports tourism sector.

The Olympics will also expose Australia's sporting and tourism assets to vast new audiences and markets, providing significant opportunities in the sports tourism field.

Australia's traditional international "sports tourism" markets have been North America, Europe and New Zealand. Rugby tests in particular, but also rugby league, cricket and to a lesser extent netball, generate significant trans-Tasman traffic flows. More recently, however there appears to be considerable emerging growth potential from upper middle and high income Asian economies, including Japan, Korea and Taiwan. Other emerging markets (e.g. India, Latin America and South Africa) offer similar promise where the distribution of wealth is changing and there is an expanding middle class with an increasing level of disposable income.

National Opportunities

Masters Games

Masters Games provide sports tourism opportunities at the international, national and regional level.

They may well prove to be the greatest potential growth area in sports tourism over the next decade. A relatively recent phenomenon, these games have already grown to occupy a central place among sports tourism activities and are keenly fought over and bid for by potential hosts, because of the sheer numbers of participants involved and their demographic profile – ie Masters – which generally equates to high levels of disposable income.

At the top of the Masters Games tree – which comprises local, inter-state, national and international events – is the World Masters Games. Recognised as the world's biggest multi-sport festival, the World Masters Games are considered the premier international event for Masters competitors, allowing them to compete regardless of ability, gender, race or religion. In terms of competition, they are twice as big as the Olympic Games.

Held every four years, the World Masters Games are participant focused, with competitors only being required to meet each sports age qualification.

In Australia, the first sanctioned Masters Games were held in 1986 in Alice Springs. The first Australian (ie national) Masters Games were held in Tasmania in 1987. Since then the Australian Masters Games have been held in Adelaide (1989), Brisbane (1991), Perth (1993), Melbourne (1995), Canberra (1997) and Adelaide (1999). The eighth Australian Masters Games will be held in Newcastle and the Hunter region in 2001.

The overall philosophy of the Australian Masters Games is to provide an incentive for mature age persons to begin, or continue active participation in sport. It aims to provide a focus for individual sports to develop their own mature age sport events and to maintain mature sports as a continuing aspect of their programs and focus. There is a definite aim of the Games to promote community interest and participation in mature age sport and to thereby contribute to the health of its citizens and the nation.

The organisers of the 2001 Australian Masters Games in Newcastle have also identified the potential for the Games to have a significant impact on tourism, sport and culture in the Newcastle and Hunter region and to increase both tourism and brand awareness of the area at a domestic and business level.

"Manufactured" Events

Over the past twenty years or so the interest in sport, especially elite sporting events, has grown at a phenomenal rate. Sport is no longer just about playing the game, it is now perceived to have an obligation to provide public entertainment.

This growth has been in parallel with advances in technology and the evolution of the digital age. People now expect to be entertained by worldwide sporting events telecast live direct to their television sets - or perhaps on their home computer.

According to a survey conducted by the Australian Bureau of Statistics in November 1997, sporting programs were the most commonly watched on television after news and current affairs, and were viewed regularly by over half of all Australians aged over 18 (55%).

A relatively recent concept is the “manufacture” of sporting events for television – events such as the “One Summer” sporting festival of beach related sporting events is a case in point of what is almost exclusively a television event. There can be a number of tourism-related benefits, including marketing benefits, from events such as these.

Another variation on the “manufactured” event theme is an event which is designed from the outset to promote tourism, rather than being designed as a purely sporting event with the tourism aspect an added extra. The main emphasis in events of this nature, of which there are still relatively few, is on the promotion of tourism to the region where the event is being held, rather than just on the event itself. An excellent example is the Jacobs Creek Tour Down Under in South Australia, which sees cyclists racing through regional South Australia, receiving national and international media coverage and by careful planning and route selection, promoting the region to potential tourists.

One of the major benefits of this type of event is that they can be designed using existing locations, and to suit the capabilities of the region. Examples include cycle races, triathlons, road races, “challenges” such as the Omeo challenge, etc. Critically, these events can be introduced to even out peaks and troughs in tourism activity, and can be tailored to fit into a regional tourism package of events, attractions and activities. They can also spread the accommodation load across a region if necessary. Given that the region which created the event then “owns” the event, they can be conducted on an annual basis which in the longer term reduces the costs associated with their staging.

Regional and Local Opportunities

Masters Games and “manufactured” events can have significant impact at the regional and local level, as well as nationally. Indeed, there are numerous market sectors within sports tourism which lend themselves to regional areas and the lower level of facilities and infrastructure which these areas generally possess.

A key issue for regional areas is to identify the range and level of resources and infrastructure which they do possess, and to use this information as the basis for identifying and pursuing suitable sports tourism opportunities.

Some examples of events which might well lend themselves to hosting by regional or local areas include:

- Schools and underage championships, which can vary in size from quite small to very large (eg Albury has been very active in pursuing this part of the market);
- National or indeed international events in “lesser” sports (eg Corowa has hosted a world parachuting championship recently while Manilla is a world-renowned paragliding centre);
- Regional championships in a variety of sports; and
- Sports which can be held at a number of locations throughout a region.

Marketing Opportunities

Sports tourism events at the international, national and regional levels have a double-barrelled effect – the direct effect of the attendance of the competitors and/or spectators and accompanying persons, and the indirect effect of the marketing of the destination which will lead to subsequent tourism flows. This indirect effect can be very large – most of the tourism benefits of the Olympics are expected to be of this nature. Even for non-mega events, for example events like the Gold Coast Indy Car Race, the Australian Formula 1 and 500cc Motor Cycle Grand Prix and even events such as the Australian Surf Life Saving Championships, this impact can be very significant.

There is a marketing effect through the word-of-mouth recommendation of attendees at the event, (such as with Masters competitions) but potentially a much greater effect if the event attracts widespread media interest – especially live television coverage.

The marketing spin-offs from sports tourism events can vary enormously depending on a range of factors, including whether the tourism aspects were considered as an integral part of the event and were “built-in” to the development process. For example, the Gold Coast Indy Car race is deliberately designed to showcase Australia’s premier beach destination – the Gold Coast – with parts of the track running right beside Surfers Paradise beach.

Given Australia’s status as a relatively little known tourism destination in world terms, the marketing benefits from events, particularly from mega-events such as the Olympics, may be greater than for countries which are already well known tourist destinations. This presents a genuine opportunity for better showcasing Australia’s tourism assets through sporting events.

6. INDUSTRY COORDINATION

It is clear that major sports events can play a significant role in generating tourism activity on a national and international scale. Such events can have positive economic and social benefits, and have in recent years been increasingly recognised by both national and State governments as a legitimate focus for tourism and general economic development strategies.

One manifestation of governments' support of events-based strategies is the provision of funding for events and infrastructure by Commonwealth, State and Territory sport departments, and the creation in most states of dedicated events corporations. As this investment in events increases, Governments are being increasingly required to justify their expenditure in these areas, with the attendant challenge being how to enhance sporting events as tourism products so as to maximise returns on investment.

Developing a Strategic Approach

The Commonwealth government is currently developing a Strategic National Plan for the Sport and Leisure Services Industry. The plan will articulate a vision for the industry and ways for the industry to become world class in the provision of sport and leisure goods and services. Success in realising this vision will require advanced business networks and better relationships between business, governments, sporting organisations and consumers of leisure activities.

A similar challenge faces the sports tourism sector. The sports tourism focus group discussions identified the need for the sports tourism sector to identify itself as a discrete industry group and to establish the linkages necessary to capture commercial opportunities.

The current lack of an identity and cohesiveness was identified as one of the major impediments to the growth of the sports tourism sector. In addition, the lack of recognition by both government and the private sector of the economic potential of sports tourism has led to many opportunities being overlooked. Some of the key issues which need to be addressed to encourage and enable the growth of sports tourism include *establishing linkages* to enable the raising of awareness of the mutual benefits and advantages of establishing alliances; coordinating planning and the *sharing of resources and information*; and identifying opportunities and mechanisms for *maximising the tourism benefits* of sporting activities.

Establishing Linkages

The fact that most events are organised by sporting bodies as sporting events first and foremost with tourism almost an optional extra, represents a failure of the market. Sporting bodies arguably have little incentive to pursue the tourism benefits which can flow from sporting activities, especially sporting events, because they themselves cannot directly capture many of those benefits. The great majority of those benefits accrue to other parties – tour operators, accommodation providers, transport operators, retail outlets, restaurants and so on. And yet many of these people may not even perceive that they stand to benefit significantly from tourism activity associated with sporting events.

To some extent, States and Territories have moved to address this by establishing major events corporations, to bring together the sports and tourism players and to bid for events. This works very well for some events – most notably the larger, higher profile events on which the events corporations generally focus.

However, the needs of second-tier or regional events are not necessarily adequately met through this process. At a regional level, governments could play a role in facilitating the establishment

of “cluster” groups comprising the full range of stakeholders in the sports tourism process. A useful model could be the cluster formed in Cairns following the focus group conducted there – “Sports Tropical North Queensland”. Significantly, the Cairns group is being coordinated by the economic development corporation, reflecting the broad benefit which sports tourism events can provide throughout the regional economy.

Sharing of Resources and Information

At the regional level, clusters or networks can play a number of roles to help coordinate activities, assist in the sharing of physical resources and encourage information sharing. For smaller sporting bodies, the level of resources required (eg. signage, barriers, marquees) may be a deterrent to running events, as can be the lack of knowledge for first time organisers. Simply sharing these resources can assist in the planning and running of successful events, with region-wide benefits for both sporting and tourism groups.

At a national level, the Commonwealth could play a role which would largely be one of the provision of information, including providing links and referrals to the enormous range of information already available, much of which has been produced by States and Territories, but which is currently not being accessed by event organisers or tourism groups.

Maximising the Tourism Benefits

There are a number of ways to maximise the returns from investment in events. These include:

- improving the yield from existing events;
- staging more events;
- targeting and supporting events that offer the biggest potential returns in terms of tourism;
- spreading the benefits of new and existing events to more regions, rather than just the major metropolitan centres; and
- better coordination of sporting events with other tourism related activities to maximise visitor stay and yield.

Success in each of these areas relies on the establishment of alliances between sport and tourism bodies at all levels - national, state/territory and regional - and greater emphasis on cooperative planning and coordination. This emerged as the top priority in almost every focus group discussion held around Australia.

Recent international experience such as that in the UK (see **Appendix 4**) has illustrated that simply bringing the sport and tourism sectors together is not sufficient to encourage the development of working alliances. It will therefore be important to demonstrate clearly to both the sport and tourism sectors the practical advantages of creating and encouraging alliances.

While sporting events continue to be organised purely as sporting events with tourism a secondary consideration, progress towards fully capturing the business opportunities associated with sports tourism will remain difficult. What is required is for events or activities to be seen as sports tourism opportunities and for organisers to give equal weight to the requirement to run a technically and administratively successful sporting event and the opportunity to maximise the visitation and yield by producing an appropriate tourism package.

Possible Commonwealth Facilitation Role

One of the key suggestions arising from the focus group discussions is for the Commonwealth government to play a facilitation role for the development of sports tourism in Australia. In doing so, the Commonwealth government could help address a perceived general lack of coordination between private sector, government, and sport and tourism bodies, and rectify the

absence of an effective and appropriate mechanism for the dissemination of information throughout the sports tourism sector. This facilitation role could focus primarily on the provision and dissemination of information, referral to appropriate agencies, and the encouragement of better communication between key sports and tourism players.

Project Facilitation

The Commonwealth government could also play a role in the facilitation of major projects – the so-called mega events – which impact on national interests as well as individual State/Territory interests. A possible model could be the approach adopted for the Olympics, where a coordination unit brought together the many Commonwealth agencies necessary to make the event a success. This role would be undertaken on an “as needs” basis, when events of this magnitude are being considered or planned.

Network Facilitation

More generally, as already mentioned, there is a need to help facilitate the establishment of sports tourism networks or clusters, especially at a regional level, to ensure opportunities are not lost and are indeed maximised. There are existing models in other industries.

By way of example, as part of the Furnishing Industry Action Agenda, which aims to improve the competitiveness of the furnishing industry, the Commonwealth Government has recently announced the establishment of a Furnishing Industry Unit within the Department of Industry, Science and Resources. This unit will act as a focal point within the Commonwealth for issues of concern to the sector, and will aim to improve networking and statistical data collection.

A similar mechanism could be established for sports tourism and might play a similar role, although broader, to that being undertaken by Soar International in Canada. Soar International is a sports information and event management company contracted by the Canadian Tourism Commission to facilitate the development of sports tourism networks in regional areas (see **Appendix 4**).

Questions

Should the Commonwealth government facilitate the development of sport tourism in Australia and, if so, in what ways? Some possibilities include:

- Information dissemination
 - development of a website to bring together a range of information relating to international, national, state, regional and local events, funding, planning, management, research and economic evaluation, with links to other relevant websites
- Project facilitation
 - form a “one-stop-shop” for events organisers to access information and facilitate liaison with other government portfolios and agencies
- Establishing networks between sports and tourism organisations and agencies
 - develop a database of key stakeholders at national level, and develop a similar model for use by state and regional areas to bring together the relevant organisations and agencies
- Hosting workshops
 - to promote and establish sports tourism “clusters” such as the one formed in Cairns following the Focus Group workshop conducted as part of the development of this Strategy. (See Case Study: Cairns Cluster)
- Assessing research needs
 - work with CRC Tourism Events sub-program and researchers to establish, maintain and disseminate a register of research undertaken, and identify research needs

- Assessing education and training needs
 - work with educational institutions, training bodies and the industry to identify education and training needs and provide information on appropriate courses available to stakeholders
- Providing advice on infrastructure development
 - provide advice to government on requirements for facilities and asset audits, disseminate results of audits
- Promoting best practice
 - disseminate information on best practice, assist in development of standards, particularly with regard to economic evaluation of events
- Establishing appropriate industry awards
 - consider possibility of developing industry “award for excellence” for sports tourism in conjunction with a peak body such as Tourism Council Australia or Sport Industry Australia.
- Promoting international competitiveness
 - disseminate information and resources which promote competitiveness and assist in capturing international markets (eg access to Government programs such as the Export Markets Development Grants Scheme)

Is a strategy of encouraging the development of regional sports tourism “clusters” an appropriate way to assist sports tourism development in regional Australia?

- **if so, whose responsibility is it to undertake this role?**

7. EDUCATION AND TRAINING

There is widespread recognition that a high level of business expertise and management skill is critical if the sports tourism sector is to successfully meet the needs of the increasingly discerning sports tourism consumer.

The focus group discussions highlighted the demand for appropriate and accessible education and training, particularly in the area of management, where many not-for-profit sporting organisations rely on part-time staff or volunteers. Equally, tourism organisations would benefit from greater awareness of sports tourism opportunities and some education and training to enable them to maximise the tourism potential of sporting events and activities.

Sport and Recreation

Sport and recreation industry specific education and training is provided through a combination of graduate/post graduate university education, vocational education and training (VET), on the job training (sometimes with a VET component), industry based training and accreditation and a range of short courses. The most common VET providers are the technical and further education (TAFE) institutions, although some sectors, for example the fitness industry, mainly use private training providers. Other training providers include community based organisations, individual businesses and some secondary schools.

A national industry training advisory body, Sport and Recreation Training Australia, which is jointly funded by industry and government with employer and employee representation, provides advice on the range of industry training needs. A National Sport Industry Training package became available in 1999.

Some areas of the industry have introduced training and accreditation systems for instructors, primarily as a result of the threat of litigation in an area of high risk of injury to participants. Employment in these areas is generally dependent on possession of an industry qualification in addition to specific industry skills.

Tourism

As in the sport and recreation sector, the tourism industry has access to industry specific education and training from a combination of graduate/post graduate university education, vocational education and training (VET), on the job training, industry based training and accreditation and a range of short courses.

A national industry training advisory body, Tourism Training Australia (TTA) develops and delivers integrated tourism packages for the tourism industry. Many forms of management and staff training are available, including in-house or on the job training, self paced and distance learning packages, and formal courses offered by TAFE colleges, universities and private tourism training enterprises.

Among the priority areas identified by TTA for future skills development are management and business skills for medium and small enterprises, marketing skills and specific management and operational skills for the meetings, conferences, exhibitions and events sector.

The Sports Tourism Sector

Despite the education and training opportunities available in the sport and recreation and tourism industries, there remains a continuing need for improving workforce and management skills. This is particularly so in areas characterised by volunteers or low wage employees or where there is a predominance of part time jobs and high staff turnover. In particular, organisations relying on government funding find it difficult to attract and retain skilled employees.

In terms of higher education, new courses focussing specifically on sports tourism are starting to emerge. For example, Southern Cross University recently introduced a degree course in Sports Tourism. However, more generally, as was suggested at the focus group discussions, a more comprehensive range of education and training opportunities is needed if the sports tourism sector is to fully realise its growth potential.

This could be achieved through the development of an industry training package that identifies the skill requirements for qualifications in various occupations, and the appropriate training courses to acquire these skills. Development of such a package would require input from industry associations, government sport and tourism bodies, industry training bodies and universities and TAFE institutions. A range of accreditation opportunities could be also developed to enhance professional development opportunities for employees, trainees, and volunteers.

Improved access and take-up of management courses would also assist businesses improve their performance. This is particularly so for many not-for-profit sporting organisations whose personnel may have a high degree of technical knowledge about their sport but are less skilled in business management. Volunteers can also pose particular challenges in the take up of management training due to time and resource constraints.

One means of improving management training could be to augment generic management courses with elements tailored to the sports tourism sector, for example, on strategic planning and development of an event calendar, how to create and maintain linkages between sport and tourism organisations, and ways to prepare an appropriate tourism package for a particular sporting market.

One suggestion made in the focus group discussions was for agencies responsible for funding sporting bodies to provide greater recognition for sporting organisations whose executive hold relevant qualifications or undertake appropriate courses or participate in the existing volunteer and management improvement programs. Another suggestion was for State and Territory funding agencies or regional organisations to arrange mobile “in-service” training for regional areas.

Specific sports tourism development courses could also assist in the formation and development of sports tourism clusters, such as the one established in Cairns. There could be a role for regional development and tourism associations to develop and make available ‘value adding’ packages to regional tourism and sporting organisations that include, for example, checklists and guidelines for organising committees. Such packages could include tourism product marketing material for sporting organisers and information about the event participants for tourism agencies and businesses.

Questions

Does there need to be better dissemination of information to sporting organisations and/or event organisers about the range of relevant training courses available?

- **if so, whose responsibility is it to undertake this role?**

Is there a need to develop a specific sports tourism training course or module, for inclusion in existing appropriate management skill programs?

- if so, who should do this?

Should funding agencies consider making grants to national, state and other sporting organisations contingent on those organisation demonstrating that it has met certain standards regarding the development of business and administrative skills?

8. REGULATORY ISSUES

Governments at all levels can and do impose requirements which impact on sports tourism events and activities. These can be broad requirements such the need for international competitors or spectators to sporting events to obtain a visa or electronic travel authority to enter Australia or they can be specific to a particular event, for example, the closure of roads for the holding of a fun run or triathlon.

Dealing with Commonwealth, State/Territory and Local government departments and agencies can be a daunting prospect for event organisers. This can be especially so for organisers who may be tackling the task of organising their event for the first time or for volunteers in sporting organisations who have neither experience in dealing with regulatory requirements or the time available to deal with these.

During the focus group discussions, the issue of government regulatory requirements was frequently raised as a significant barrier to the successful organisation of sporting events and activities, and the maximisation of tourism opportunities from those activities. It was suggested on numerous occasions that governments could play a role by providing event organisers with a mechanism to help deal with complex regulatory requirements.

A number of State and Territory governments have already developed assistance packages that go some way towards providing just such a service. For example, the Canberra Tourism and Events Corporation (CTEC) has developed a publication entitled *Assistance for Special Events – Information Handbook for Event Organisers*, which contains a section on Government liaison with relevant contact details for organisations such as police, emergency services, roads and traffic bodies, venue hire, litter disposal and so on. The Handbook provides a how-to guide for organising an event, covering issues such as budgeting, sponsorship, media relations, general organisation tips, and evaluating the outcome of the event.

This kind of assistance is not available in all States and Territories. Even where advice is available through Events Corporations, this may not always be available at the local or regional level – ie contact details may not be available for all local government agencies with whom event organisers in regional areas might have to deal. Further, the CTEC publication does not deal with liaison with Commonwealth agencies such as Customs, Immigration and Quarantine for events where there may be international competitors involved.

There is therefore a clear information gap for event organisers in dealing effectively with government agencies – at the local, Commonwealth, and in some instances at least, State/Territory level. There may be a need for Commonwealth, State/Territory and local governments to cooperate more fully in the provision of information to help fill this gap.

Commonwealth Agencies

At the Commonwealth level, a number of agencies oversee regulatory requirements which impact on event organisers, in particular where there are international competitors, spectators or other participants involved.

Visas

Visitors to Australia are required to obtain a visa to enter the country. In the case of most visitors travelling as tourists, this takes the form of an Electronic Travel Authority (ETA) which is, in effect, an “invisible visa”.

There are different categories of visas, including business visas and sport visas. The latter are often used by professional sports people who will be staying for some time in Australia pursuing their sporting interests. Depending on the nature and duration of the sporting activity being undertaken, people travelling to Australia who will be participating in some form of sports tourism activity may choose to travel under all of these different visa types.

Two recent innovations by the Department of Immigration and Multicultural Affairs (DIMA) which administers Australia's visa system, will assist organisers and international participants in sporting events in Australia. These are the *International Event Coordinator Network (IECN)*, and *Streamlined Short Term Business Entry*. The IECN is a network of immigration officers located within the DIMA Business Centre in each State and Territory capital city. The role of these officers is to alert event organisers of immigration requirements and to advise Australian posts overseas of details of forthcoming events. The network is potentially of great benefit to event organisers, including organisers of sporting events, who appear not to have utilised its services greatly to this point.

The Streamlined Short Term Business Entry arrangements have been put in place in the lead up to the Olympics, and have enabled sports people to enter Australia on business visas, including the ETA version of the business visa. This is a quicker and more streamlined option for many sports people and will help facilitate travel to Australia to participate in sporting activities. This arrangement may continue following the Olympics.

Customs

The Australian Customs Service maintains Australia's border integrity by ensuring that prohibited goods are not brought into Australia and that other goods brought in either permanently or temporarily, pay the appropriate rate of duty or tax. This may include sporting goods brought in by international visitors for use in competition.

As with immigration requirements, the Australian Customs Service can make special arrangements to cater for the needs of teams competing in international events, provided it receives sufficient notice of forthcoming events. For example, special dispensation may be obtained to enable temporary duty-free entry of goods for sporting events.

The special arrangements put in place for the Sydney 2000 Olympic Games will no doubt provide valuable lessons in facilitating the movement of goods and people for future major sporting events.

Quarantine

The Australian Quarantine Inspection Service (AQIS) seeks to protect Australia against the introduction of exotic plant and animal matter which could pose a disease risk for Australia's unique environment and its agricultural industries.

For this reason, AQIS inspects goods entering Australia, including sporting equipment, food supplements, and therapeutic substances.

Where horses are brought to Australia to compete in races or in equestrian events, a period of quarantine is required. Early contact with AQIS helps minimise any quarantine difficulties which might otherwise impact on a sporting event.

AQIS also anticipate that the knowledge and experience gained from the Olympics will help them to adopt best practice approaches to future major sporting events.

Questions

Does government regulation mean that sports tourism opportunities are being lost or not maximised?

Would improved coordination and referral mechanisms for event organisers and/or tourism operators help to overcome some of the difficulties associated with government regulation?

9. INFRASTRUCTURE

The ability of cities or regions to host successful sports tourism activities and events depends on there being adequate infrastructure in place. This includes sporting facilities, accommodation, air, road and rail transport networks both to and within the region, and other tourism related facilities such as restaurants, retail outlets and entertainment venues.

While the focus of event organisers tends to be on the actual sporting infrastructure, the existence of adequate sporting facilities does not necessarily mean that an event can be held at that location. If accommodation and transport requirements cannot be met or are inadequate, even small regional events will be difficult to host. Accordingly, a strategic approach which considers the adequacy and availability of all relevant infrastructure needs to be adopted when planning sporting events and activities.

Sporting facilities are expensive to provide. For this reason, their funding has almost always been the domain of governments – local, State and Territory and Commonwealth. This can lead to distortions in the provision of facilities, with priorities sometimes influenced by factors other than the perceived benefits to a community. Arguably, this has led to an over-investment in sporting facilities in some areas, and consequent excess capacity. This excess capacity represents a genuine opportunity for sports tourism development – significant benefits can be gained through better facilities utilisation, without the need for further costly investment.

The relationship between facilities and the hosting of events is complex. Investment in facilities can rarely be justified on the basis of being used only for major sporting events. Also, it cannot be assumed that the mere provision of high quality sporting facilities will guarantee a region or a state a flow of major sports tourism opportunities. It is ultimately then incumbent upon a region itself to attract facilities funding, possibly through the hosting of a “catalytic” event, and thereafter to “sell” those facilities effectively to event organisers to help ensure their sustainable use.

Cost-effectiveness is a key consideration in attracting facilities funding. It may be that the costs associated with the construction and maintenance of national or international standard facilities simply cannot be justified for community use alone or even taking into consideration increased use associated with the hosting of national or international events. The commercial viability of facilities can be further reduced when accompanying accommodation and transport infrastructure is inadequate for the hosting of major events.

More recently there has been a trend towards the construction of multi-purpose facilities which can be utilised for a variety of community and entertainment functions as well as the holding of a variety of sporting activities and events. This kind of facility can prove more cost effective than traditional facilities dedicated to a narrow focus on a particular sport or range of sports.

When considering facilities investment, it is also important - both for governments and private investors - to consider the regional facilities environment so as to avoid duplication and maximise the synergies with complementary facilities in nearby regions. The development of regional sporting “hubs” for particular sports can also help reduce the risk of constructing sports specific facilities which are economically unsustainable.

More generally, a strategy by governments and sporting organisations of “sharing” State or national events around regional Australia would help justify the financial investment in regional facilities as well as help ensure a more even distribution of the economic benefits associated with sporting events.

State/Regional Facilities and Asset Audits

Facilities investment and prioritisation of facilities funding would also be enhanced by improved information about the supply and demand for regional sporting infrastructure. This would also help address the difficulties faced by event promoters, organisers or prospective organisers who often lack awareness of just what facilities and of what standard, are available in various regions.

Currently, the Commonwealth is working with the State and Territory governments on undertaking a facilities audit of state, national and international standard facilities. To complement this work regions could benefit if similar audits were conducted at the regional level.

Frequently, events may be organised with little knowledge of, or regard to, other events planned for the same time. This can have serious ramifications for all events staged at that time, with multiple demands on infrastructure and services, which may well exceed the capacity of the region to manage. Data on the utilisation of sporting facilities is therefore important, particularly where there may be strong seasonal variations. In this way, sports tourism activities, along with other events-based tourism activity, can be targeted at low or shoulder season times, to help minimise peaks and troughs.

Accommodation Infrastructure

One of the key issues for maximising the tourism benefits of sporting activity and events is the availability of a range of accessible accommodation, covering the budget to the luxury markets. As part of each region's asset audit, an accommodation directory should be produced detailing the bed numbers in each sector of the market. By identifying the range of accommodation available, local sports tourism organisers can more effectively target particular events, knowing that suitable accommodation for the specific market is available. For example, under age championships may well have quite different accommodation needs from a masters competition.

As part of this accommodation audit, consideration could be given to utilising or upgrading existing facilities such as school dormitories, barracks etc, which may well provide adequate accommodation for the lower end of the market.

A vital part of encouraging the development of sports tourism in a region is identifying the benefits which can accrue to the whole community. In particular the businesses directly involved in the provision of services should be made aware of the importance of catering for the needs of their guests to ensure they have a good experience. In the case of accommodation providers, they need to address the particular needs of athletes including bed lengths and adequate and appropriate catering.

Transport Infrastructure

A key issue emerging from the focus group discussions is high cost of transportation in many areas of regional Australia – both to and within regions. An associated issue was lack of transport capacity – the inability to move large numbers of participants in and out of many regions in a short space of time.

Ongoing reforms and deregulation in the transport sector, especially domestic aviation, have the potential to deliver significant benefits to regional Australia, and to help encourage the development of sports tourism and other events based tourism in regional Australia.

Questions

Would regional facilities audits and asset audits assist event organisers to plan for the hosting of sporting events in regional areas?

- **if so, whose responsibility should it be do undertake these audits?**

Should the funding of sporting infrastructure, including in regional areas, be based on a more rigorous assessment of the potential economic benefits of that infrastructure, including possible tourism benefits?

- **what methodologies might be employed to determine those benefits?**

10. RESEARCH AND DATA COLLECTION

Sports tourism is a relatively new area of study given its recent rise as a significant niche sector for the Australian tourism industry. A number of Australian researchers have begun to specialise in this field but the current information base available to the industry is still relatively small and a range of research needs to be conducted.

The effects of the Sydney Olympic Games will undoubtedly provide the focus for many research efforts in the coming year but this needs to be complemented by a more grass roots approach to research across a range of sports tourism activities.

A major inhibitor to more and better quality research is the current lack of data available. While some data is collected in relation to individual events, there is no widespread or systematic data series across all sports tourism activities at a state or national level.

The International Visitor Survey (IVS) and National Visitor Survey (NVS) produced by the Bureau of Tourism Research (BTR) currently include limited questions regarding activities undertaken by visitors while travelling throughout Australia. The NVS includes the categories of Sport - Participant or Spectator under Main Purpose of Visit in its survey form. In the IVS 'to participate in or watch an organised sporting event' is a response to a question regarding factors that influenced the decision to visit Australia.

This data provides at best a very partial picture of the level of sports tourism activity in Australia. To improve the available data, there may be some scope to expand the range of questions regarding sports related activities within these surveys or to initiate a stand-alone sports tourism baseline study.

The BTR have also undertaken initial research profiling Australian 'sports tourists'. (Tourism Research Report 3rd edition – *Sports Tourism: An Australian Perspective*) This research extends the definition of sports tourism further than that adopted for this Strategy to include day trips, ie. a round trip of at least 50 kilometres, where the traveller stays away from home for at least 4 hours but does not spend a night away from home as part of that travel. The Survey results showed that 6 per cent of day trips and 5 per cent of overnight trips taken by Australians in Australia, were taken with sport as the primary motivation. (It could be anticipated that a significant further number of trips were undertaken with sport as a secondary motivation.) The paper found that that Australians who travelled to take part in sports, either as spectators, officials or participants (day and overnight) are likely to be male; aged between 15 and 24 years; from an upper income household (earning more than \$78 000 per year); and that they generate higher yield per night.

The slightly different definition employed in the BTR study suggests what should probably be the first step in data collection for the sports tourism sector - the establishment of a uniform set of standard definitions for sports tourism. The adoption of standard definitions provides the opportunity for various researchers to produce data which has comparability across the sports tourism sector. An extensive range of agreed definitions should be developed, allowing researchers to choose those required for specific data sets while retaining commonality. The definition adopted in this Strategy might provide the basis for discussion towards such agreement.

Data types which might provide the basis for a range of research in the sports tourism field include (for both domestic and international visitors):

- expenditure on trips involving sporting activities (including expenditure on total trip and on the "sports" component);

- more detailed questions on motivation for travel, especially for domestic travellers;
- satisfaction information;
- length of stay data (including length of stay for total trip and for the “sports” component);
- demographic information (age, gender, income, occupation);
- type of accommodation used while travelling for sports related purposes; and
- type of transport used while travelling for sports related purposes.

Areas of research which may be useful to the industry include:

- appraisal of potential and proposed sport events;
- estimation of market for new or proposed sport tours;
- identification of infrastructure needed for sports tourism;
- specification of new tourism uses for existing sports infrastructure;
- recommendations for modifications to existing sports infrastructure to enhance tourism value; and
- profiling of sports tourism segments (eg training camps, tours of facilities).

Other possible areas of research could be:

- measuring the economic impact of sport events at a regional, State/Territory and national level;
- measuring the economic impact of sporting infrastructure;
- measuring the social impact of sports tourism; and
- assessment of the environmental impacts of sport infrastructure and sports tourists.

Work by government bodies such as the Bureau of Tourism Research and the Australian Bureau of Statistics can often provide useful broader contexts for specific research and in the case of BTR often more targeted baseline data. Specific research needs can also be met through academic and industry collaboration. For example, the Cooperative Research Centre for Sustainable Tourism has an events sub-program which potentially can address some of the research and data needs, especially if its activities are focussed towards sports events and activities at the non-micro level. The CRC has also recently established a sports tourism “node”, located at the University of Canberra, to provide a focus for its research into the sports tourism market.

There is considerable scope for cooperation between industry and research bodies in improving the information available to the sports tourism sector. There is also scope for industry to address its own information needs in terms of local environments and of its specific marketing and development requirements.

Questions

Does there need to be a set of agreed definitions for the sports tourism sector, including definitions of “sports tourism” for both domestic and international travellers?

- if so, who should coordinate this work?

Do we need to establish a comprehensive baseline data set on the sports tourism sector to enable research to be undertaken on its economic, social and environmental impacts, as well as trends within the sector?

- if so, who should undertake this work?

Does research into sports tourism need to be better coordinated?

- if so, who should coordinate sports tourism research?

Does research into sports tourism need to focus more on the “big picture” issues?

- if so, how can this be achieved?

How can we increase industry awareness of available research and statistics to assist operators to make sound business decisions?

11. EVALUATION OF EVENTS

Ongoing public sector reform and rationalisation have placed public tourism authorities and sporting organisations under increasing pressure to operate cost-effectively. Government agencies have to be more accountable for policies, programs and funding decisions and this includes funding for sporting events.

Governments lend their support to events on the basis of decisions made regarding benefits and costs ranging from financial to social and cultural. Such events may have the capacity to create income and employment in the short term and generate increased visitation and related investment in the longer term.

Determining the value of sporting events has been a perennially difficult issue for governments to resolve. There are no standard criteria for evaluating the economic significance of staging events. There also appears to be an absence of rigorous and comprehensive criteria for evaluating publicly funded tourism events, with great disparity between States, regions and research companies in their approach, both to the assessment of economic impact and to less tangible cultural and social impacts.

These differing approaches have made it difficult for governments not only to justify expenditure on events, but also to compare the economic success of various events. It is imperative for the credibility of the industry that sound methodologies are used to measure the return on the investment, and that these methodologies are widely accepted.

Development of a commonly accepted framework for evaluation would allow event organisers to compare and predict outcomes for their events with similar sized events. The ability to establish these areas of comparability (as well as differences) is important in gaining an overall view of sports tourism events in Australia and making assessments about the size and characteristics of this industry. This would also facilitate national and international comparisons.

Given the limited budgets of organisations expected to undertake evaluations of events and the often complex methodology, a framework for evaluation is essential for smaller/regional organisations. Several of the State events bodies have developed basic evaluation models which are appropriate but more importantly are financially accessible to the smaller sporting and tourism organisations. It may be appropriate to develop a national standard model for events of this size and nature, possibly based on one of the existing models.

Mega-events such as the 2000 Sydney Olympics Games stand alone in terms of developing methodology to assess their impact - the impact is felt at regional, state and national levels. Much preparatory work has already been completed by researchers in this area leading up to the Games and this will continue post-Games. Notable in this regard is the Federal Government publication *The Olympic Effect* which assesses the likely tourism impact of the Games. A particular challenge will be to ensure that some of the innovative modelling approaches and methodologies developed for, and implemented during, the Games, can filter down to evaluation for smaller events.

Questions

Is it desirable or feasible to develop a standardised methodology for events evaluation or should we seek to develop a range of “best practice” models from which organisations can choose, to assess the impacts of events?

If so -

- **who will progress any activity in this area?**
- **who will determine which model(s) should be endorsed?**

12. IMPLEMENTATION

The proposals contained in this strategy will require the concerted efforts of a range of organisations if they are to be successfully implemented and if the sports tourism sector is to achieve its full potential. Those organisations include governments at all levels (Commonwealth, State/Territory and local), the tourism industry, the sports sector including national and state/territory sporting organisations and researchers.

A key theme of the strategy is the need for better coordination between what is a very diverse range of stakeholders involved in the sports tourism sector. Lack of communication and coordination, especially between sporting groups and the tourism sector, has been identified as a major impediment to maximising the tourism potential of sporting activities and events.

At the state/territory level, events corporations take on much of the responsibility for building these links. At the local level, there is arguably a greater need for development of networks or “clusters” focussing on sports tourism development. At the national level, there may also be a role for an overarching coordination mechanism of this nature.

Such a national-level group, which could be similar to the Canadian Sports Tourism Coalition (see **Appendix 4**), could be comprised of representatives of key stakeholders across industry and government, and could play a significant role in:

- raising the level of awareness about the sports tourism sector within both industry and government;
- identifying and pursuing specific research needs and priorities;
- identifying and overseeing the role of any facilitation unit which might be established following the release of this strategy; and
- overseeing and reporting on progress in implementing the strategy.

Questions

Is there a need for a group to oversee the implementation of the National Sports Tourism Strategy?

- **if so, how should such a group be comprised?**

Should the various events organisations across States and Territories identify areas for possible cooperation?

THE STRATEGY DEVELOPMENT PROCESS

The development of a National Sports Tourism Strategy has its genesis in the *National Action Plan for Tourism*. The Plan, released in 1998, provides a policy framework for the future development of the tourism industry and identifies the development of a range of niche tourism products as one of the avenues which will promote strong future growth and diversification of the Australian tourism industry. Sports tourism is identified as one of the sectors showing enormous potential for further development.

Against this background, the Minister for Sport and Tourism announced in November 1999 that the Commonwealth would develop a National Sports Tourism Strategy, to examine impediments and opportunities impacting on the development of the sector and to see what role the Commonwealth might play to facilitate its growth.

Given the historical role of the States and Territories in attracting, developing, promoting and hosting major events, including sporting events, consultations were undertaken at an early stage with State and Territory government agencies and a range of other key stakeholders. These included Sport Industry Australia, the Australian Tourist Commission, the Australian Sports Commission, industry associations and academic researchers prominent in sports tourism and/or events research, including the Co-operative Research Centre for Sustainable Tourism.

At the same time, desk research was being undertaken and an inclusion on Sports Tourism was developed for the Commonwealth's Discussion paper, *End Goal 2006 – Moving the Sport and Recreation Industry to a Higher Growth Path*. The discussion paper, released in December 1999, was an initial step in the development of a Strategic National Plan for the Sport and Recreation Industry, in fulfilment of an election commitment made by the Government during the 1998 election campaign.

On the basis of the initial consultations and feedback from the *End Goal Paper*, a short discussion paper was developed, drawing together themes and issues associated with sports tourism development. This paper was utilised in a series of focus group discussions convened around Australia in May and June 2000. The group discussions were held in every capital city, as well as two key regional centres, Cairns and Tamworth.

Typically, the focus group discussions brought together industry and government sport, tourism and events representatives. They included representatives of major sporting organisations from each centre or region, managers of major sporting facilities, tour operators with an interest in sporting events or activities, economic development agencies, regional tourism bodies and event organisers.

A number of common themes and issues emerged in many or most groups, but specific issues were also identified impacting on particular regions or States/Territories.

This draft, "*Towards a National Sports Tourism Strategy*" has been prepared on the basis of these consultations and accompanying research. There will be further opportunity for interested parties to comment, following its release in October 2000. Feedback received at that stage will be taken into account in the finalisation of the Strategy.

SUMMARY OF FOCUS GROUP OUTCOMES

The focus groups were convened with two primary objectives. Firstly to identify issues of importance to sports tourism stakeholders; and secondly to elicit comment on the discussion paper prepared based on the initial consultations, feedback and research. A number of issues were identified, which were then allocated priority rankings by the group participants. The outcomes of the ten focus groups have been collated and summarised.

Nine common issues have been identified through this process, and the following is a summary of these in priority order and the suggested strategies for addressing each of these.

Issue	Suggested Strategies
1. Strategic Approach	
Lack of strategic approach to sports tourism development	<ol style="list-style-type: none"> 1. Promote network of sport and tourism organisations to improve communication and coordination. 2. Develop industry profile - establish peak body. 3. Clarify roles of stakeholders. 4. Educate national sporting organisations and tourism organisations on commercial opportunities sports tourism provides. 5. Promote development of business and event management skills in sporting organisations. 6. Encourage coordination of event calendars. 7. Encourage development of events-based tourism strategies.
2. Coordination and Communication	
Need for better communication at national, State and regional level.	<ol style="list-style-type: none"> 1. Establish national coordination/ communication /facilitation unit to assist the development of sports tourism. 2. Improve information dissemination through web site with links to existing relevant databases. 3. Facilitate access to research findings and resources. 4. Improve lines of communication between stakeholders 5. Maintain project facilitation mechanisms established for Olympics for future major events. 6. Encourage cross-agency linkages to give access to tourism product marketing resources and material.
3. Regional Development	
Promote the development of sports tourism in regional areas and address impediments to its growth.	<ol style="list-style-type: none"> 1. Develop region specific databases for event managers of stakeholders, services, facilities, accommodation and infrastructure. 2. Encourage sharing of information and expertise - through development of "sports tourism clusters" in regional areas. 3. Target niche events appropriate to area and facilities. 4. Address access issues - transport, sponsorship, media. 5. Encourage coordination to avoid duplication of facilities. 6. Encourage integrated view of sport, tourism and business

	<p>opportunities at regional level.</p> <p>7. Encourage rotation of national events throughout all of Australia.</p>
4. Research	Suggested Strategies
Need to develop sound research base.	<ol style="list-style-type: none"> 1. Clearly define sports tourism. 2. Coordinated development of research agenda. 3. Conduct further research into economic and social impacts of events, include consideration of both direct and flow-on effects and disseminate findings to stakeholders. 4. Conduct accurate market analysis for identification of existing and potential markets. 5. Encourage better understanding of the sports tourism market needs. 6. Undertake post event research - long term tracking of benefits of events.
5. Facility development	
Need coordinated and sound economic approach to development and use of facilities.	<ol style="list-style-type: none"> 1. Need to conduct thorough facilities audit, also develop “asset audit” of regional infrastructure to assist in effective planning. 2. Encourage capacity utilisation of existing facilities. 3. Examine cost effectiveness of developing different standards of facilities in regional areas, consider multi-use facilities.
6. Funding	
Address difficulties in accessing funding for conducting events.	<ol style="list-style-type: none"> 1. Encourage State governments to recognise difficulties faced by State and regional areas in accessing funding and sponsorship for events. 2. Identify funding sources - communicate to organisations what funding is available and how to access it. 3. Ensure funding is equitable as possible across States and Territories. 4. Assist regional areas to access financial and in-kind sponsorships, possibly as a group. 5. Encourage partnerships between government and private sector - recognise role of private sector in supporting second tier events.
7. Education and Training	
Identify and address education and training needs in sports tourism sector.	<ol style="list-style-type: none"> 1. Develop profile of the industry to identify opportunities for education, employment and experience. 2. Promote implementation of event management training courses. 3. Develop appropriate sports tourism training modules. 4. Improve business skills through effective training tailored to sector, including volunteers. 5. Encourage development and distribution of manuals and educational resources.
8. Standardised Economic Modelling	
Need standardised approach to evaluation of events.	<ol style="list-style-type: none"> 1. Develop standardised approach to economic, cultural, social and environmental modelling. 2. Develop standardised evaluation model which is affordable and appropriate for regional areas. 3. Develop methods to deliver meaningful information to

	<p>local businesses on impact of sports tourism.</p> <p>4. Develop best practice guidelines for evaluation of major events.</p>
9. Participation	Suggested Strategies
Need to recognise need to provide ongoing support for mass participation in sport.	<ol style="list-style-type: none"> 1. Recognise that participation underpins sports tourism. 2. Address needs of all sectors of the population. 3. Encourage and support volunteers.

DISCUSSION OF DEFINITIONS

The strong linkages between sport and tourism are well recognised, and the literature contains many studies devoted to the topic, however, as discussed earlier, to date there has been no consensus on a definition of sports tourism, and a wide range of definitions have been adopted by different parties.

Definitions used may be influenced by the availability of data, the intent of research being undertaken, current sport and tourism definitions in the country or region concerned, etc.

There is broad agreement about the tourism side of the definition with most countries generally accepting definitions similar to those observed in Australia for international and domestic tourists. (Although there could be some disagreement over whether day trips should be included in a definition of domestic sports tourism - see for example, the article *Sports Tourism: An Australian Perspective* in BTR Tourism Research Report 3rd issue.)

However, there are wide-ranging views on what constitutes sport. Should recreational and adventure activities be included, is sport only sport when it is “organised”, are non-competitive events such as fun runs still considered sporting activities? Some other examples of sports tourism definitions are set out below:

Sport Tourist: A temporary visitor staying at least twenty-four hours in the site visited and the purpose of whose journey is to attend sport related events. Specific activity categories are- sports events; sports attractions; sports tours; sports resorts; and sports cruises. (Douvis et al, p.2)

Sport: - The whole range of competitive and non-competitive active pursuits that involve skill, strategy, and/or chance in which human beings engage, at their own level, simply for enjoyment and training or to raise their performance to levels of publicly acclaimed excellence.

Tourism: - The temporary movement of people beyond their own home and work locality involving experience unlike those of everyday life. The experiences might take place as part of a holiday or as an ancillary to business travel.

Sport Tourism: - All forms of active and passive involvement in sporting activity, participated in casually or in an organised way for non-commercial or business/commercial reasons that necessitate travel away from home and work locality. (Standeven & DeKnop, p.12)

Sports tourism is a combination of sports activities and travel. From a sport marketing and sport management perspective, it consists of two broad categories of products:

- sports participation travel (travel for the purpose of participating in a sports, recreation, leisure or fitness activity); and
- sports spectatorial travel (travel for the purpose of spectating sports, recreation, leisure or fitness activities or events).

(Pitts 1997, p31)

INTERNATIONAL CASE STUDIES

Britain

In 1992 the creation of the Department of National Heritage (DNH) pulled together under one roof the leisure sectors of sport, tourism, and the arts. For the first time there appeared to be a formal connection between sport and tourism which might lead to some development of the sports tourism sector. Unfortunately this turned out not to be the case, and for all practical purposes, no significant relationship between sport and tourism was established at either the policy or operational level.

In fact, rather than further integrate sport and tourism, the subsequent policies of the DNH tended to reverse previous policies that allowed greater integration eg. reduction of English Tourist Board core funding and a narrower focus for the Sports Council. (Bull & Weed 1997(1); Standeven & DeKnop)

However, the historical difficulties of linking sport and tourism in Britain may be a thing of the past. The Department of Culture, Media and Sport (formerly DNH) announced in February 1999 the Government's intention to develop innovative niche markets such as sports tourism. The announcement forms part of a 15 point plan for tourism to unlock the full potential of Britain's unique cultural and natural heritage. UK Sport has also created an economic impact "guidance document" to assist with the undertaking of impact studies to determine the value of sports events. (Dept of Culture, Media & Sport; English Tourism Council)

Furthermore, the British Tourist Authority has recently developed a sports tourism marketing strategy which is backed up by three staff in England and a recently appointed staff member in their Sydney office. This innovative move to place a dedicated sports tourism officer in a key source market may place the UK at the forefront of international sport tourism development. While it is very early in the process, the appointment of a dedicated officer in this role may open up a range of opportunities for sports tourism in the UK.

There may be lessons for Australia and in particular, our marketing body the Australian Tourist Commission, should the UK's approach prove to be successful.

Canada

In 1998, 37% of Canada's 73.7 million domestic trips were for sports tourism purposes. In Canada, sport tourists are defined as individuals who travelled and in doing so participated in or attended a sport event during the reference period. Sport tourists account for between 2.5 and 5 million individuals from June to September, July and August being the most popular months for sport tourist activities (15% and 18%). (Statistics Canada - 1998 Canadian Travel Survey) (Note that this does not mean that 37% of tourism activity was sports tourism – rather that 37% of travellers travelled at least once for sports purposes).

Since 1996 the Canadian Tourism Commission (CTC) has been involved in a program designed to promote community and tourism industry interest in development of sports tourism as a viable contributor to the economic well-being of local communities. The Canadian Sports Tourism Initiative is a program designed to increase the quality and quantity of sports events hosted in Canada and has a number of objectives:

- to create a viable sports tourism industry in Canada;

- to organise Canadian communities to pursue sports tourism by providing them with assistance in organising the appropriate local resources and infrastructures to be effective;
- to assist communities in developing sports tourism commissions, appropriately organised to recruit sports events;
- to create linkages with the Canadian national, provincial and local sports system and event hosts to assist in the development of the sports tourism industry;
- to create new revenue streams and resources for local event organisers, sports friendly businesses and sport in general;
- to provide effective communication channels to facilitate business to business relationship marketing opportunities between event rights holders and potential host cities; and
- to create an industry-led, Canadian Sports Tourism Coalition to provide a forum for education, market intelligence and sports tourism marketing for communities and sports involved in the sports tourism business.

Based on positive support demonstrated by communities across Canada, in 1997, a partnership between the CTC, client communities and sport/tourism industry was borne. Soar International, a Vancouver based sports information and event management company was contracted to manage the process.

Communities that have decided to be part of the Sports Tourism Initiative's community planning program participated in a comprehensive planning process. To start the process, a Soar International facilitator presents a half day session to a broad constituency of local sports, tourism and community leaders, covering such topics as what is sports tourism, who are sports tourists, how are sports events organised, where are the opportunities to work together and how a sports tourism commission can be developed. Secondly, using a local project coordinator and a planning tool kit adapted to fit the local community process, data on which to base a sports tourism marketing strategy is gathered.

With this data, Soar International facilitates a workshop which provides sufficient information to prepare a strategic business plan. Using a locally facilitated process, this plan is presented to all the key groups in the community with an interest to ensuring its successful implementation. Soar International then assists the community to refine and implement the strategic plan on an ongoing basis.

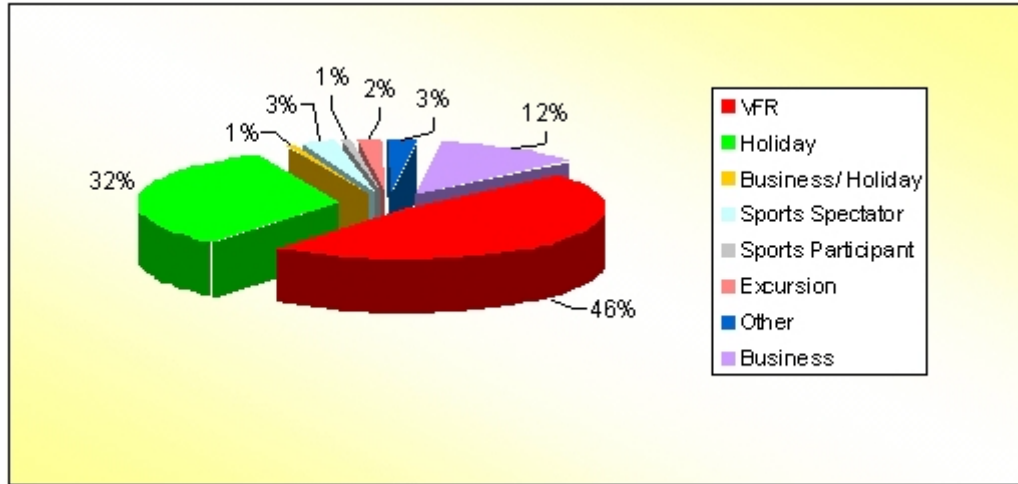
By the end of 1999 the regions of Kelowna, Cranbrook, Edmonton, London, Kingston, Hamilton, Moncton, St. John's, Gatineau and Western Newfoundland/Cornerbrook had all undertaken the sports tourism planning process. (Canadian Tourism Commission; Swart 1998)

South Africa

In May 1996 the South African Department of Environmental Affairs and Tourism released a white paper on the development and promotion of tourism in South Africa. The sports tourism sector was specifically identified within this policy document. The intent was both to encourage the development of sports tourism and to encourage the provision of facilities, training, marketing and promotion to give emphasis to the development of this segment of the industry.

Following the release of the white paper, and in order to capitalise on South Africa's sporting successes and re-entry into the world tourism scene, South Africa Sports Tourism (SAST) was launched jointly by the Ministry of Environmental Affairs and Tourism, and the Ministry of Sport and Recreation in October 1997. (Swart, 1998; Standeven & DeKnop, 1999)

The success of SAST in developing the international market for sport tourism in South Africa is yet to be established. As can be seen in the graph below, Satour figures suggest that Sports Tourism (spectator and participant) makes up four per cent of the domestic tourism market.

Purpose of Visit for All South African Domestic Trips in 1996

Source: Satour Domestic Tourism Survey

SUBMISSIONS RECEIVED

Alvey Reels (Australia), Mr Bruce J Alvey
Athletics Australia, Mr Simon Allatson
Australia Sport International, Mr Stephen Porter
Australian Tourist Commission, Mr John Morse
AV Syntec P/L, Mr Paul Bull
Campsie Sports Physiotherapy & Rehabilitation Centre, Mr Paul James
Classic Sportswear, Mr Tony Magnus
Cox Richardson, Mr John Richardson
CRC for Sustainable Tourism Pty Ltd, Professor Terry De Lacy
Diverse Concepts International, Dr Dion Klein
Emu Oil Therapies Pty Ltd, Mr Neil Duncan
Healthequip, Mr John Bright
Illawarra and Southern Highlands Convention and Sports Bureau, Ms Rachel Preddey
Jim Bradley Speedball Company, Mr Steven Clegg
Jindabyne Winter Sport Academy (NSW), Mr Steve Gibb
Office for Recreation and Sport - Department of Industry and Trade, Mr Simon Forrest
Queensland Events Corporation, Mr Allan Boosey
Queensland Industry of Recreational Fishing, Mr Bruce J Alvey
Racing Solutions, Mr Ian Chivers
Roysen Engineering P/L, Australian Barbell Company, P& J Sporting Products, Mrs Denise Langford
South Australian Thoroughbred Racing Authority, Mr Glen Hardy
Swimplex Pty Limited, Mr Geoffrey Leaver
Tasmanian Office of Sport and Recreation, Mr David Buckingham
Tourism Victoria, Ms Melinda Anderson
University of Tasmania - Virtual Sailing, Professor Norman Saunders
University of Canberra (ACT), Professor Trevor Mules
Victorian Major Events Company Limited, Ms Rosanne Dampf

FIGURE 1 - INTERNATIONAL VISITORS

The intent to watch or participate in an organised sporting event influenced the decision to visit Australia (based on 1998 IVS data)

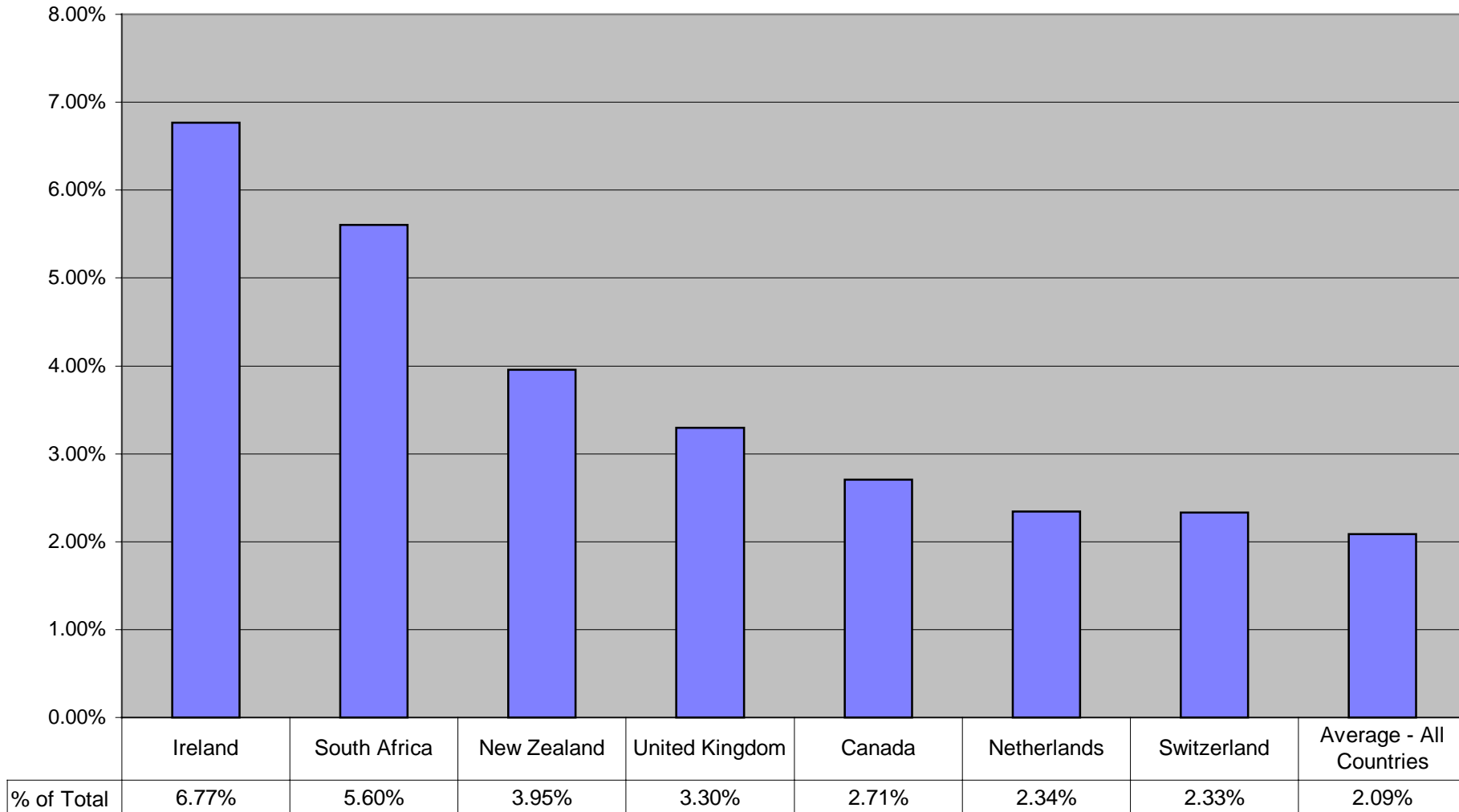


FIGURE 2 - INTERNATIONAL VISITORS

**Attended an organised sporting event while visiting Australia
(based on 1998 IVS data)**

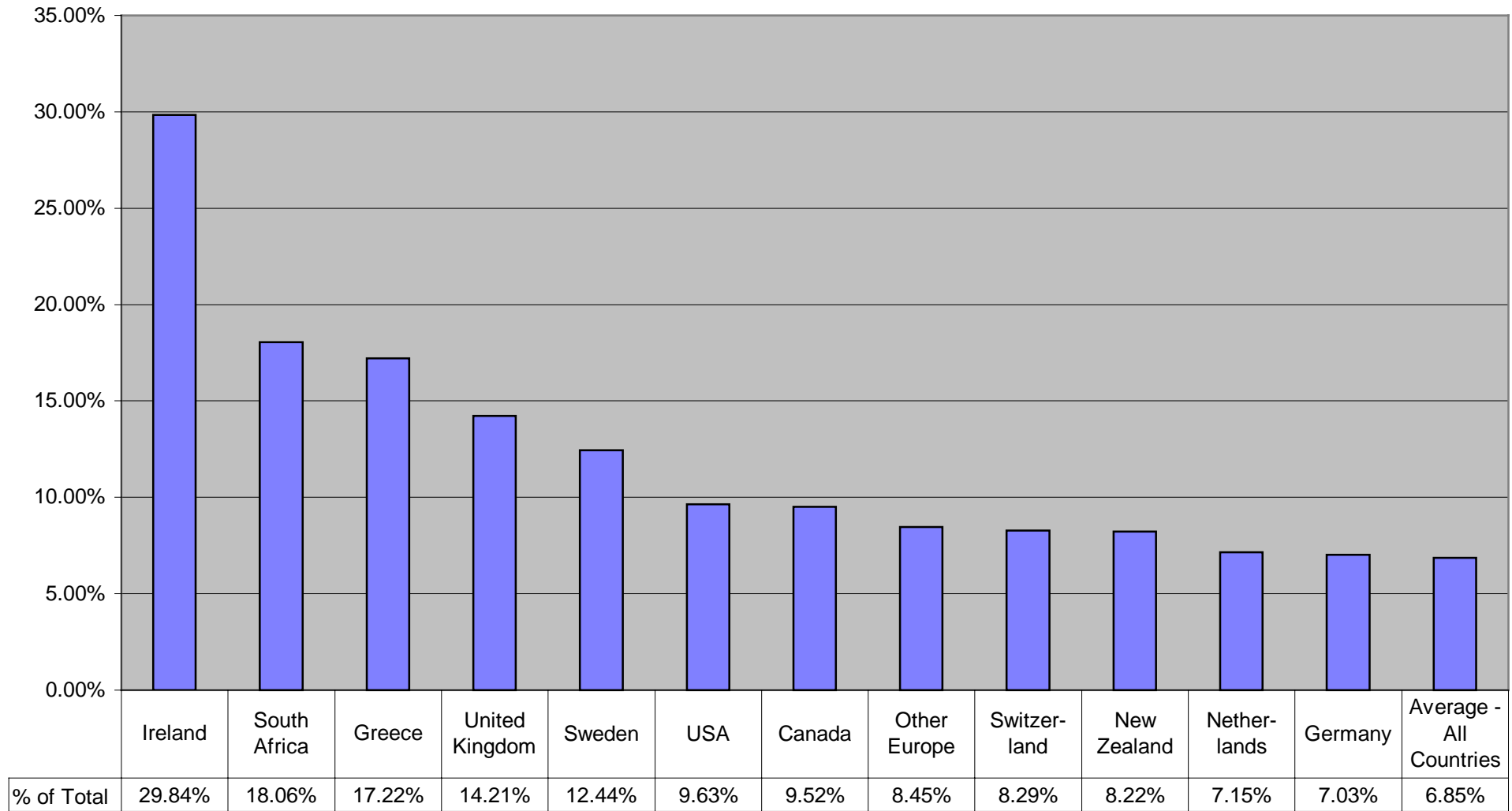


FIGURE 3 - DOMESTIC VISITORS**Percentage of nights spent by overnight visitors**

Per cent

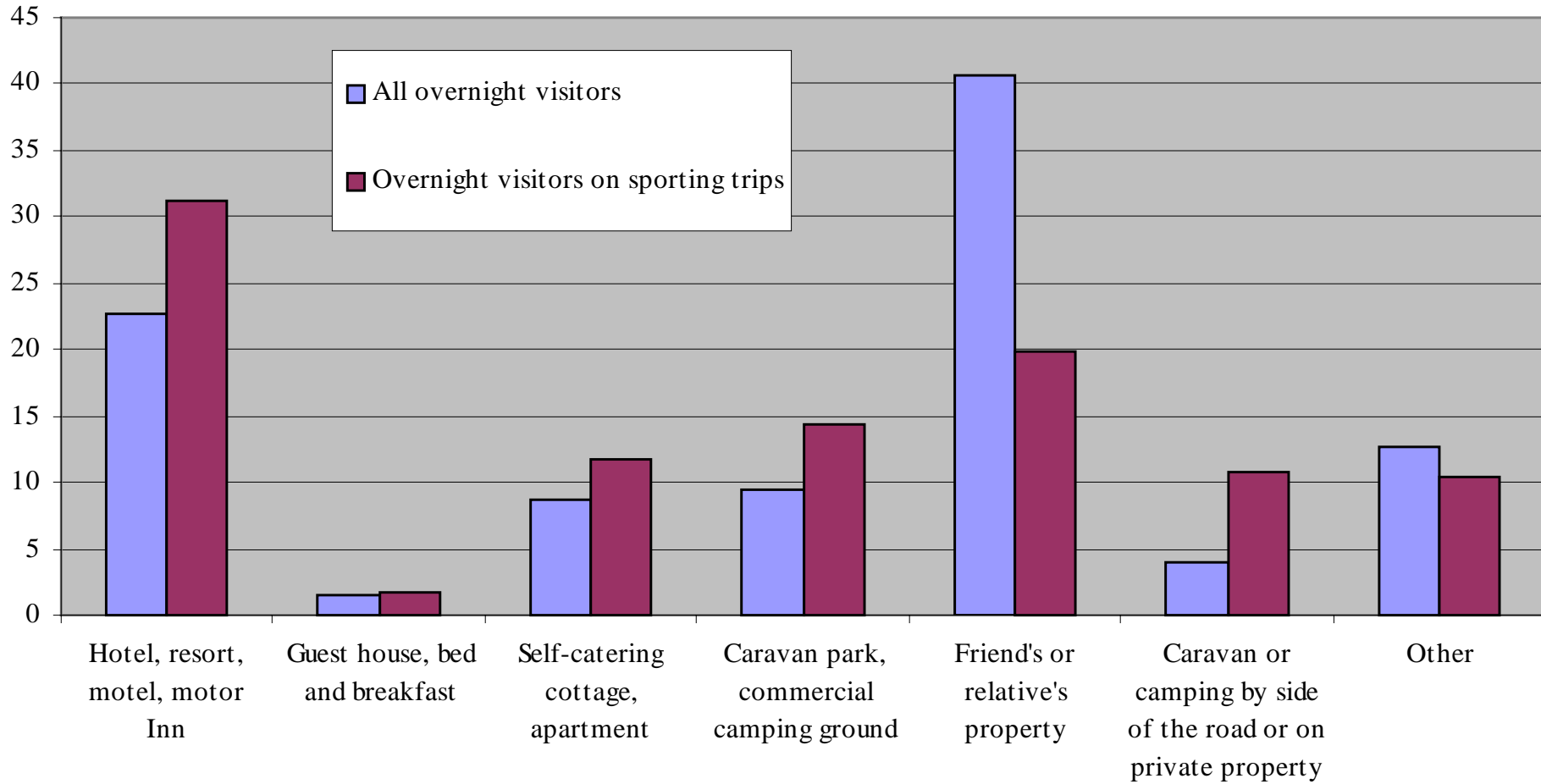
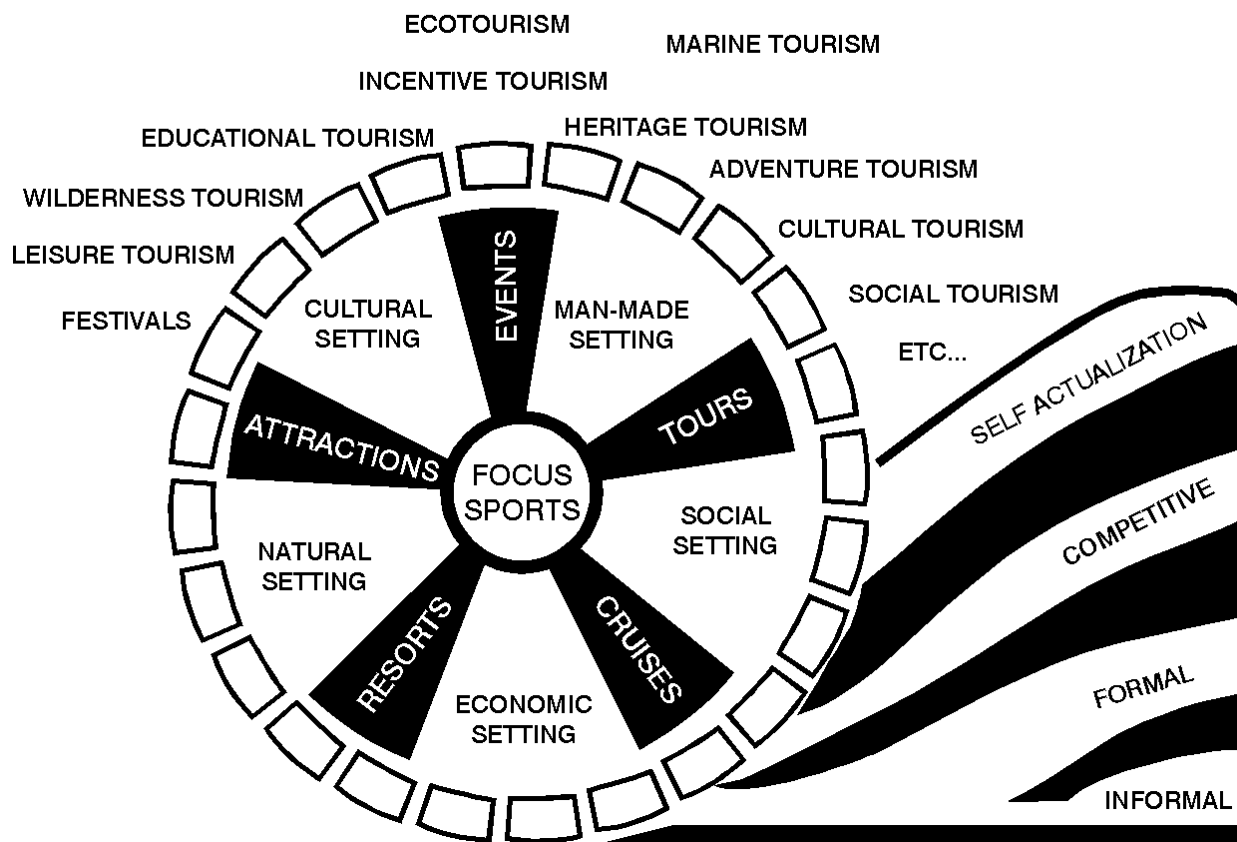


FIGURE 4 SPORTS TOURISM - A MODEL*

THE SPORTS TOURISM PHENOMENON



- a) The Hub represents the main focus of sports tourism around which the respective physical activity be it recreational, competitive or both, evolve.
- b) The Spokes illustrate the five different sports tourism categories according to specific touristic endeavours.
- c) The Spoke Interspaces demonstrate five potential settings in which the sport tourism activity, for the participant or spectator or both, could take place.
- d) The Outer Rim indicates different building blocks that potentially could and do contribute to the overall development of sports tourism.
- e) The Roadway suggests motivation elements which impel tourists, be they participant, spectator or both, in varying degrees and different directions to be involved in specific sports offerings and opportunities.

The Model depicts movement on a Wavy Roadway over time; whereby, each sports tourist can adapt and adjust according to his/her needs, interests and desires.
(Kurtzman & Zauhar)

*** Note that this model is only one possible interpretation of the way in which the sports tourism market operates. It is included for information only and is not necessarily accepted as valid for the purposes of this Strategy.**

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ACRONYMS

AQIS	Australian Quarantine and Inspection Service
ASCOT	Australian Standing Committee on Tourism
ATC	Australian Tourist Commission
BTR	Bureau of Tourism Research
CRC	Cooperative Research Centres
CTC	Canadian Tourism Commission
CTEC	Canberra Tourism and Events Corporation
DIMA	Department of Immigration and Multicultural Affairs
DNH	Department of National Heritage (UK)
ETA	Electronic Travel Authority
GDP	Gross Domestic Product
IECN	International Event Coordinator Network
IOC	International Olympic Committee
ISR	Industry Science and Resources (Department of)
IVS	International Visitor Survey
NAPT	National Action Plan for Tourism
NSO	National Sporting Organisation
NVS	National Visitor Survey
SAST	South Africa Sports Tourism
SCORS	Standing Committee on Recreation and Sport
SIA	Sports Industry Australia
SRMC	Sport and Recreation Ministers Council
TCA	Tourism Council Australia
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council