

Summary

Overall, the study has enabled us to conclude that the Trent Bridge Test Match already has a significant economic impact – at the event, and in the wider economy. However, we also conclude that building on existing successes, significant potential also exists to expand the benefits of sports tourism of this type.

The study has demonstrated that the Trent Bridge Test Match already has a significant impact on the local economy, concluding that the event generated an estimated economic impact in excess of £1.1m. However, research also demonstrated that by further developing existing activities, there is significant potential to expand this impact even further.

Visitor profile information and characteristics such as the high proportion of repeat visitors to Trent Bridge (62%), large proportion of visitors staying overnight (27%), and the large numbers travelling from outside the region, all offer particular opportunities to extend economic impacts. Through effective marketing, potential certainly exists to increase expenditure in the local economy among those attending the Test Match. With regard to extending this impact even further, importantly, the research also showed strong levels of interest among respondents in sporting packages, with resultant opportunities to cross-sell between sporting and tourism events, venues and activities. Particularly strong levels of interest were shown for golfing and tennis packages.

Evaluation and Recommendations

Visitors

- There is a need to build on Visitor interest in other tourism activities to extend the economic benefits from cricket visitors into the wider tourism economy

Impact

- The research recognised that the test match already generates a significant economic impact in the region. However there is further potential waiting to be 'exploited' for enhanced economic impact through Tourism e.g. extended stay times, alternative partner packages

Marketing and Promotion

It was recognised that the planning and marketing of the test match can have an important impact on areas of spending, both inside and outside the ground, and on overall visitor satisfaction, which in turn can influence the future economic contribution the event could generate.

Key opportunities include: -

- Development of existing customer database, to target potential consumers effectively
- Opportunities to provide targeted information e.g. other sporting events, eating and drinking guides
- Development of tailored packages including food vouchers, accommodation, transport, attraction tickets
- Targeting overseas trade through collaborative working with VisitBritain
- Showcasing Nottinghamshire through regional and national media coverage - the relatively slow pace, number of natural gaps in play and overall length of play in cricket provide particular opportunities
- Proactive press/media information which can be used for 'filler' information during coverage
- Exploring opportunities for on-site information to influence decisions, perhaps during breaks in play
- Encouraging and promoting opportunities to extend the trip e.g. evening activity, encouraging a friend/partner to spend the day involved in alternative pursuits

Product Development / Visitor Experience

Actions to support successful Tourism destinations and events usually are made up of appropriate mix of product development and promotional initiatives. However marketing can only do so much and if the experience falls below expectations, repeat business will be jeopardised.

Potential areas for action: -

- In-ground Opportunities: -
Catering, improve the quality offer through the development of a purpose made food and drink area, with the use of local food and drink
- Transport: -
Improve signage for visitors
Investigate improvements to the public transport network to support timetable of event
Improve availability of taxis at key times

Partnerships and Relationships with Businesses

- To engage with tourism businesses, there is a need to highlight the opportunities available on an on-going basis and provide up to date information about match schedules and major events
- Encourage collaborative working through new tourism structural arrangements such as Destination Management Partnerships (DMP)
- Improve mutual awareness of issues between sport and tourism

Application of Findings to Other Sporting Events

In terms of assessing the appropriateness of the methodology used in this case, HET feels that the general approach has proved robust. The development of a workable methodology may be particularly useful given the emerging planning/prioritisation, which will be taking place across the East Midlands sub-regions in the coming months.

Particular issues to consider in this regard include: -

- Gaining strong levels of feedback from business surveys is often problematic in the tourism sector. Securing additional feedback from a small number of focus groups may have added value
- A partnership approach was an absolute necessity in this instance. However it is important to have clarity at the outset of the project in terms of expectations and requirements. The partnership approach taken between NCCC, Experience Nottinghamshire and local businesses is to be commended and has demonstrated effective collaborative working between the sectors
- It is important, as in other areas of market orientated tourism research, that measurement/monitoring is ongoing. A study's role in creating an initial baseline is key to this activity
- With high profile and large scale events, the impact of media and lead-sponsor requirements cannot be underestimated. Consequently, the restrictions these factors can place, particularly in terms of marketing and promotional options, can be significant
- It is important to note that the sporting event itself is the key rationale behind visits being made - other activities tend to be subsidiary to this. Consequently it is unrealistic to expect the entire audience to be responsive to, and open to influence from, tourism messages. Approximately a 33% of the audience at Trent Bridge expressed an interest in other Tourism products. To avoid wasting resources, it is important that interest levels/propensity to be influenced by tourism messages are established as an element of the research

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"An evaluation of the local impact of the Trent Bridge Test Match"

'Tourism Beyond The Boundary'

England vs. South Africa Test Match, Trent Bridge, Nottingham,
August 2003

Summary





A Sporting Region

The East Midlands Sports Tourism Impact Study research was carried out by Heart of England Tourism (HET), with funding from the East Midlands Development Agency (*emda*), and in partnership with Nottinghamshire County Cricket Club (NCCC), Experience Nottinghamshire and Sport England - East Midlands. This document provides a brief overview of the study and its key findings.

There has been a growing awareness in recent years of the value of sports tourism. The recently published East Midlands Tourism Strategy 'Destination East Midlands' identifies sports tourism as a key attractor for visitors to the region. In addition to a host of small events, the East Midlands benefits from having a strong top-level sports infrastructure, including three major football stadiums, two premier league rugby union teams, four first class cricket counties, two Premier League basketball teams, one premier league ice hockey team, two Grand Prix standard motor racing circuits, five horse racing courses, as well as the headquarters of 10 National Governing Bodies and National Centres for 13 sports. In particular, Nottingham is recognised as having a strong 'cluster' of sporting high profile sporting venues.

These top class sporting facilities are vital components of the region's tourism economy, creating special reasons to visit, and attracting expenditure by participants, spectators and administrators alike. The approach outlined in the East Midlands Tourism Strategy is to promote the continued development of this sector of the tourism economy; in particular seeking to encourage and promote events and activities that encourage overnight stays.

Similarly, the East Midlands Regional Sports Board plan - 'Change 4 Sport, 2004 2008' also recognises the importance of building a "stronger regional and local economy through realising the economic potential of sport". A key action contained in the plan is to "make sure that opportunities associated with sports tourism are explored".

Study Aims and Methodology

The key overall aim of the research was to provide information that will help decision makers from the sports, tourism and economic development sectors to maximise the tourism impact and economic contribution which sporting events make to destinations and local economies. Specifically, the study aimed to provide;

- An assessment of the 2003 England vs South Africa Test Match at Trent Bridge
- An investigation of the current tourism impact of the Trent Bridge Test Match on the local economy
- An investigation of the opportunities for growing the tourism impact of Trent Bridge and other events beyond the direct benefits provided by the sporting event itself
- Preparation of a set of recommendations and information which can be accessed by tourism destination managers and event organisers, as a means of applying the key lessons emerging from this study for the East Midlands region

Research consisted of three key strands

- A 400 sample in-ground survey of spectators and those attending the Test Match, focused on gaining data on profile, characteristics, attitudes and activities
- A survey of 700 Nottingham and Nottinghamshire businesses to assess the current economic impact of the event
- A series of interviews with key stakeholders

In-Ground Survey: Key Findings

Fieldwork was conducted over the first 4 days of the Test Match. A total of 414 people were interviewed on a simple random basis.

Visitor Origins

- 30% of visitors originated from Nottinghamshire, 20% from elsewhere in the East Midlands, with only 1% from overseas

Visitor Profile

- Approximately 90% of visitors were male
- 50% of all visitors were in the 25-34 and 35-44 age groups
- 78% of respondents were from the ABC1 socio-economic groupings

Trip Characteristics

- 27% of those interviewed intended to stay overnight in the area
- Hotels accounted for most overnight stays, however, in excess of 25% of visitors stayed with friends and relatives
- 50% of people travelled by car, but a large proportion also used taxis and public transport
- Almost a third of those interviewed, intended to go to the Test Match for more than 1 day
- 62% of respondents were repeat visitors to Trent Bridge
- 43% of respondents attended the Trent Bridge Test annually

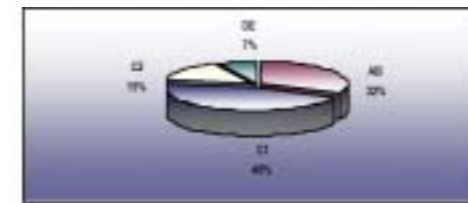
Visit Interests / Other Activities

A key issue addressed in the study was testing levels of interest in other activities / events in the city and the surrounding area, among the Test Match audience.

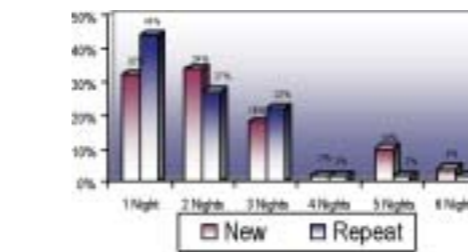
- 29% of respondents expressed interest in receiving information on other Nottingham and Nottinghamshire activities with their tickets
- Interest levels in other activities varied considerably by age group
- The majority of respondents (76%) who stated that they would be participating in other events in Nottingham were classified as ABC1s
- Strong levels of interest were shown in sports tourism packages - 29% of respondents indicated an interest in purchasing sports tourism packages in Nottingham
- Significant levels of interest in golfing and tennis packages

Business Survey

A survey of local businesses was undertaken, seeking to understand the economic impact of the Test Match on Nottingham and the surrounding areas. The survey generated a response rate of 15%.

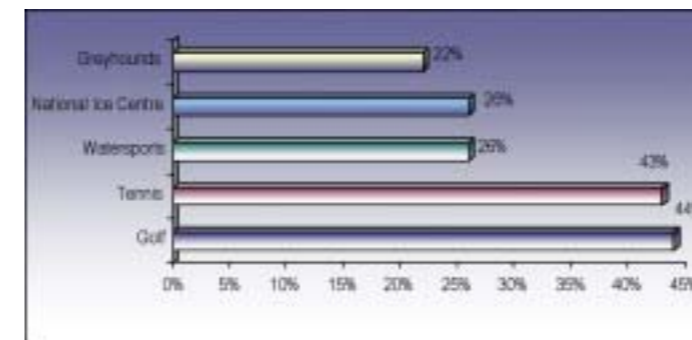


Socio-Economic Profile of Test Match Visitors



Length of Stay in Nottingham

Visitors showed interest in receiving information on:			
Sports	74%	Pubs/Clubs	63%
Theatres	32%	Shopping	24%
Arts/Culture	23%	Sherwood Forest	21%
Nottingham Castle	21%	Accommodation	20%
Robin Hood	19%	City of Caves	15%



Interest Levels in Sports Tourism Packages

Types and location of Businesses

The survey was sent to a wide range of businesses including accommodation providers and visitor attractions, pubs, cafes and restaurants, shops, and taxi/public transport providers.

- The highest returns were from the serviced accommodation sector with 55% from guest houses/hotels
- Over half of the respondents were from outside Nottingham itself

Repeat Custom

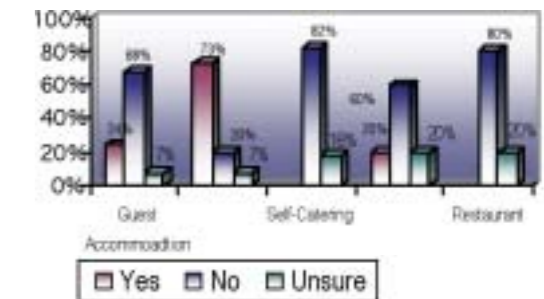
- Hotel businesses saw the highest proportion of repeat custom (72%)
- 24% of guest house accommodation providers stated that they received repeat business every year

Direct Benefits

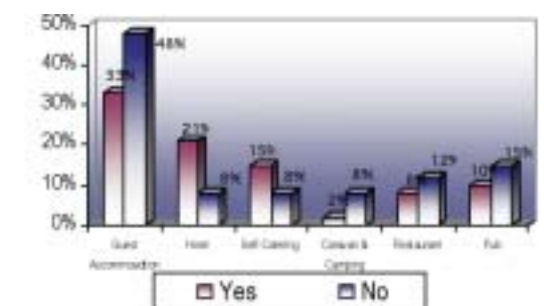
- 40% of businesses felt that their business had benefited from the test match
- 99% of the businesses questioned, were aware that the Test Match was taking place at Trent Bridge

Promotional Activity

- The majority of businesses (84%) did not use any special promotions
- 9 out of 10 did not have any links with the cricket club
- Almost half of businesses, indicated that they would be interested in participating in future initiatives with Trent Bridge



Levels of Repeat Custom



Interest In Participating in Future Initiatives with Trent Bridge

Economic Impact

The 2003 Trent Bridge Test Match was highly successful, with total attendance in excess of 73,000.

The study did not initially seek to establish an estimate of total expenditure generated by the Test Match. However, it was possible to generate some broad estimates of overall in-ground expenditure, and throughout the local economy. Estimates of economic impact are as follows (NB: figures subject to rounding):

In ground expenditure	£625,000 (excluding ticket sales, corporate hospitality, sponsorship, media rights)
Out of ground expenditure	£490,000
Estimated Economic Impact	£1,115,000

For information on methodology used to determine economic impact, please refer to full report