

World Championships LONDON 2017

SEE THE BEST

IAAF World Championships LONDON 2017



IAAF
WORLD CHAMPIONSHIPS
LONDON 2017

ECONOMIC IMPACT REPORT

presented by



The Sports Consultancy

<u>Executive summary</u>	3
<u>Introduction</u>	5
<u>Direct economic impact</u>	8
<u>Induced, indirect and total economic impact</u>	33
<u>Social impact</u>	35
<u>Methodology and limitations</u>	41

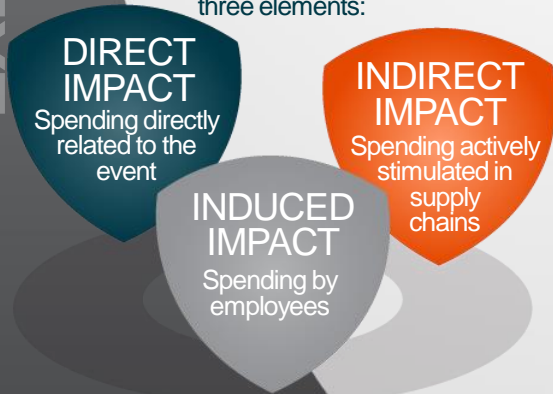


**EXECUTIVE
SUMMARY**

The IAAF commissioned The Sports Consultancy to analyse the direct and indirect economic impact on London of the 2017 IAAF World Championships.



Economic impact is defined as the **total amount of additional expenditure – together with other intangible economic benefits** – generated by the hosting of the Championships in London. The total figure is made up of three elements:



Our economic impact analysis was carried out using the **eventIMPACTS methodology** – a recognized tool that enables organisers to understand the overall impact of their events. It takes into account a number of components, which are outlined fully in this report, to estimate an overall economic impact.

The IAAF World Championships generated a direct economic impact of £79m and a potential total economic impact of between £109m and £159.6m in London, England. This impact was generated by various groups, including spectators, athletes and officials, media and the organisers themselves.



In addition to its economic impact, the event also had a considerable social impact, both in terms of tourism and physical activity. **91% of non-local respondents** to our survey would **recommend London as a holiday destination** and 69% stated they are more likely to return to London in the next 2 years as a result of attending the Championships. In addition, **43% of respondents** said they would **increase their levels of regular physical activity** as a result of attending the Championships.



INTRODUCTION

OVERVIEW
OF THE
EVENT10 DAYS NON-STOP ACTION AS THE WORLD'S LEADING
ATHLETES COMPETE TO BECOME WORLD CHAMPIONS

This report analyses the economic impact of the 2017 IAAF World Championships. The event represents the pinnacle of athletics competition for the athletes, spectators, broadcasters and sponsors outside of the Olympic Games.

The event has a long history, beginning in 1983 in Helsinki, originally being held every 4 years. From the Tokyo 1991 edition onwards, it has been held biennially. The 2017 iteration was awarded to London in November 2011 and was the first major event to be held in the Queen Elizabeth Olympic Park since the 2012 Olympics.

The event was held over 10 days and consisted of 163 events across a range of 24 different disciplines resulting in the most competitive championships ever.

The 2017 event entered the record books with more than 705,000 tickets sold across 14 sessions of sport, the most ever sold at a single championship, with peak figures reaching 56,620 for a single session.

London 2017 saw 2,038 athletes, representing 205 countries, compete at the championships. The World Championships are open to all IAAF member countries should the athlete meet their required qualification standard.

The cost of travel and accommodation for Member Federation athlete teams is met in part by the IAAF and the Local Organising Committee (LOC). The costs for any additional athlete team members outside of this quota are met by the Member Federation.

**10 DAYS**

The 2017 IAAF World Championships were held between 4th August – 13th August 2017

**1 VENUE**

The event was staged at London's Queen Elizabeth Olympic Park. (Central London was also used)

**163 EVENTS**

Across 24 disciplines over the course of the event

**705,000 TICKETS**

A world record was set for the number of tickets sold at a single championship

**2038 ATHLETES**

Participated in the event



IMPACT

OUTLINE OF ECONOMIC IMPACT



In simple terms, the economic impact of an event is the total amount of additional expenditure generated within a defined area (the host economy) as a direct consequence of staging an event. Other than those events that require significant infrastructure investment, spending by visitors in the host economy is typically the biggest factor in generating economic impact. However, other areas, such as spending by the event organisers should also be considered.

An economic impact analysis seeks to estimate the net change in a host economy, i.e. measurement of the likely cash inflows and outflows and the net change.

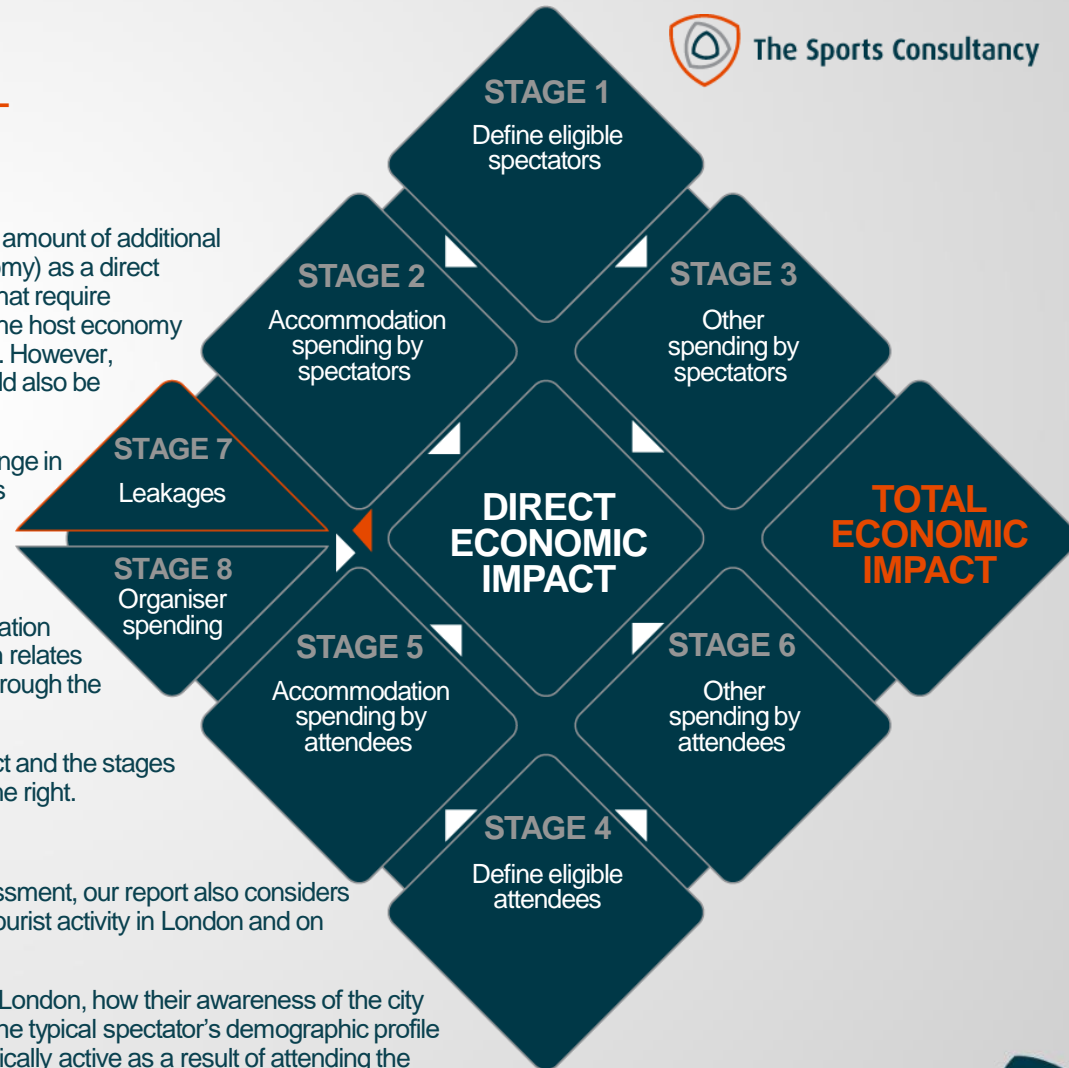
In addition to the direct impacts discussed above, economic studies can also consider secondary effects, such as indirect impact (or “ripple”) through the re-circulation of the initial spectator spend and induced impact, which relates to increases in employment and household income through the economic activity generated by the event.

The focus of this study is on direct economic impact and the stages and process are summarised in the diagram on the right.

SOCIAL IMPACT

In association with the economic impact assessment, our report also considers the impact that the Championships had on tourist activity in London and on physical activity.

This includes spectators' perceptions of London, how their awareness of the city has been impacted, an evaluation of the typical spectator's demographic profile and their propensity to be more physically active as a result of attending the Championships.





**DIRECT
ECONOMIC
IMPACT**



METHODOLOGY

As outlined in the introduction, the estimate of the direct impact has been based on the eventIMPACTS methodology. This is a standard approach that has been developed in the UK by the Department for Culture, Media and Sport, UK Sport, Tourism Northern Ireland, Event Scotland, London & Partners and the Welsh Government. The first stage of the analysis of economic impact is to define the host economy, i.e. the area of focus for the impact. For this project, Greater London was selected as the event was contained within the city. With the host economy defined, the stages for estimating the economic impact are set out below. As can be seen, it covers spectator spending, other attendees' spending, leakages and organiser spending.

Stage 1: calculate eligible spectator numbers (i.e. those from outside the host economy);

Stage 2: apply spectator spending patterns (for accommodation);

Stage 3: calculate other spectator spend (non-accommodation);

Stage 4: calculate other attendee numbers (athletes, coaches, IAAF partners, VIPs, etc.);

Stage 5: apply attendee spending patterns (for accommodation);

Stage 6: calculate other attendees' spend (non-accommodation);

Stage 7: estimate leakages; and

Stage 8: calculate organiser spending in the host economy.

Through completing these stages the direct economic impact can be identified. Following this, consideration was given to multipliers that could be applied to derive a total economic impact.

In terms of currency, data was collected in various forms. For the purposes of analysis, all financial data was converted to Pounds Sterling.



DATA SOURCES

The economic impact assessment has been informed by data from a number of sources:

SPECTATOR SURVEY

This was undertaken on several days of the event (Sunday 6 August, Saturday 12 August and Sunday 13 August). A total of 702 responses were secured. The survey asked questions about where spectators had come from, their reason for being there, typical daily spending, etc and was used to inform the Stages 2, 3, 5 and 6 of the methodology.

TICKET DATABASE

IAAF provided a complete ticket database, with total admissions and the country of origin.

ATTENDEE ACCREDITATION LIST

IAAF provided an attendee accreditation list, including different personnel present, arrivals and departures, and accommodation details. This was used to inform the Stage 4 and Stage 6 of the methodology.

ATTENDEE INTERVIEWS

Several interviews were conducted with different attendees, such as IAAF staff and broadcasters. This was used to inform Stage 5 and 6 of the methodology.

VOLUNTEER SURVEY

A survey was sent out for volunteers to complete. The survey asked questions about where volunteers had come from, typical daily spending etc. This was used to inform Stage 6 of the methodology.

ATHLETE SURVEY

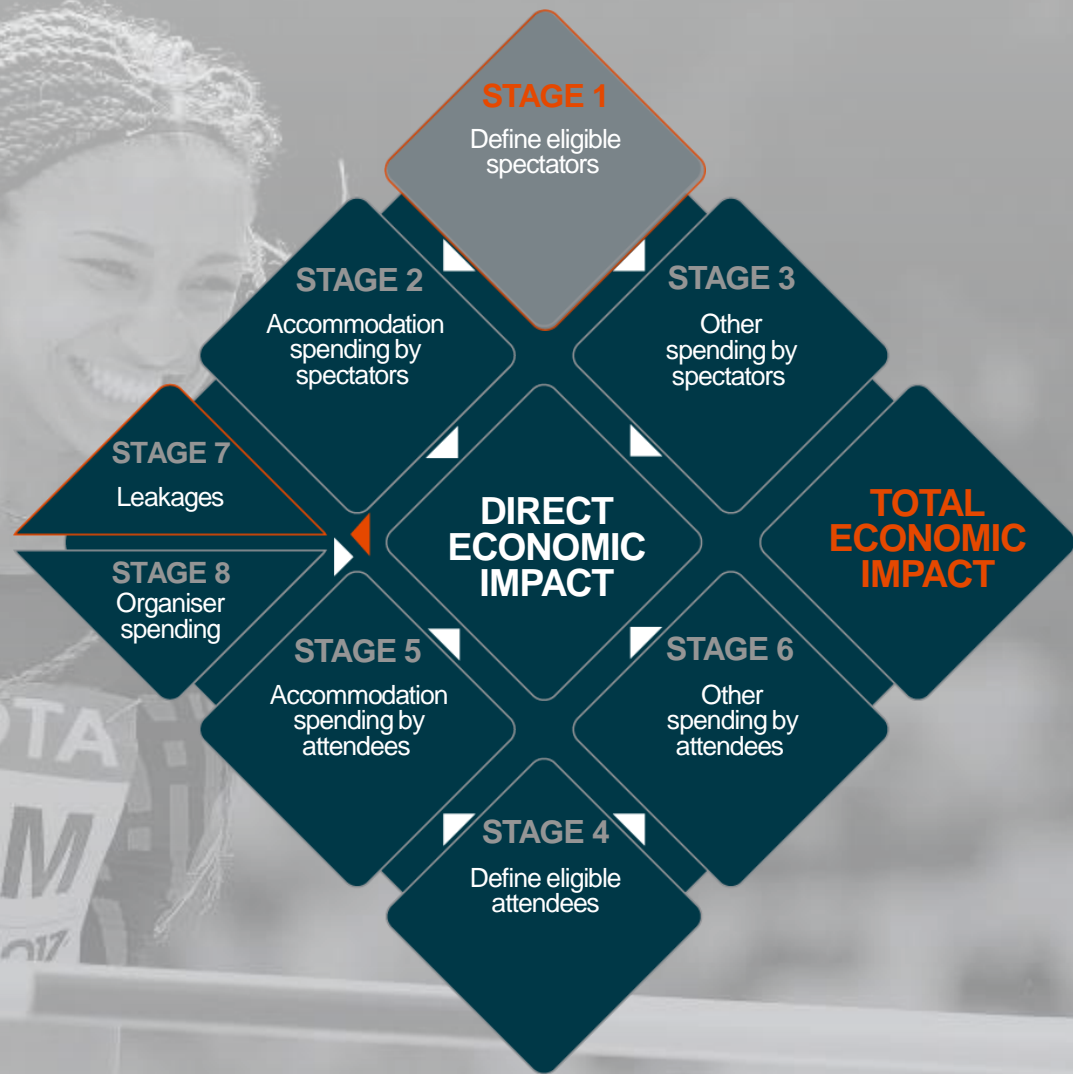
A survey was sent out to competitors, team officials and coaches. 157 responses were received. The survey asked questions about the duration of stay, average daily spend and the origin of the attendee. This was used to inform Stage 6 of the methodology.

EVENT BUDGET

The local organising committee (LOC) provided a detailed breakdown of the event budget and suppliers used, and this informed Stage 8 of the methodology.



**DIRECT
ECONOMIC
IMPACT**



ELIGIBLE SPECTATOR NUMBERS

The aim of the first three stages of the methodology is to establish the number of spectators that are eligible to be included in the calculation of direct economic impact. There are two key factors here:

- Firstly, the eligible spectators must come from outside of the host economy (and therefore be generating additional spending in the economy)
- Secondly, they must be in London specifically for the championships.

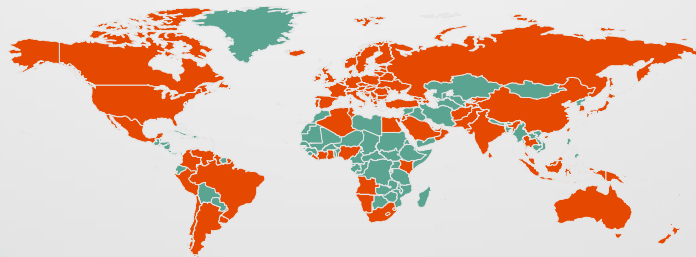
The total spectator admissions number was **676,517**. This number was informed by the ticket database.

However, as this was a multi-day event and tickets were sold on a session-by-session basis, the total spectator admission number includes those who attended more than one session. On average, spectators attended **2.02** sessions, giving the estimated total number of unique spectators as **335,371**.

The assumptions made for the split of origin were based on the data from the spectator survey and shown below. It can be seen that the majority of spectators came from the UK, while only approximately **45,000** spectator admissions came from outside of the UK.

Although the large majority of spectators came from the UK, the event attracted spectators from a wide range of countries. Only two European countries did not have spectators attend the Championships. The map below shows the country of origin of spectators, taken from the ticket database.

Figure 1: Origin of foreign spectators



Key



-  Country from which there was at least one spectator
-  Country from which there were no spectators

Table 1: Origin of spectator admissions

Origin of spectators	Percentage
United Kingdom	93%
Europe (excluding the UK)	5%
International (excluding Europe)	2%

ELIGIBLE SPECTATOR NUMBERS

Of the spectators from the UK, the percentage that came from the host economy (i.e. London) were as set out on the right.

Table 2: Origin of UK spectators admissions

Origin of spectators
Percentage of spectators from the UK resident in London
Percentage of total spectators resident in London

Origin of spectators

33%

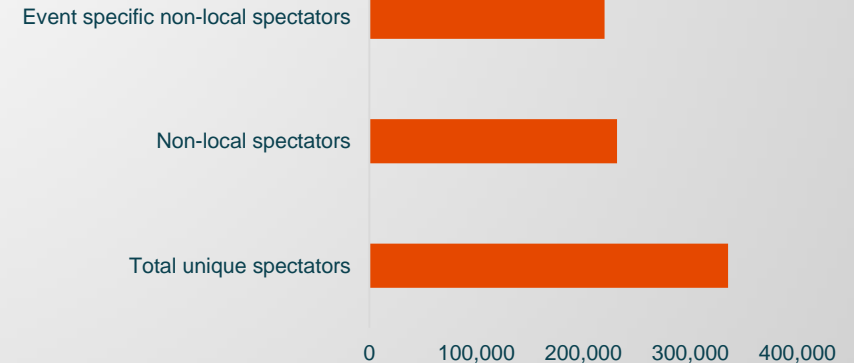
31%

Using the data provided, it is now possible to establish the number of non-local spectators (i.e. those from outside the host economy). The number of non-local spectators who attended the World Championships was circa **231,519**.

The final adjustment required to these figures is to remove those spectators for whom attending the event is not their primary reason for being in London (so-called “casual” visitors).

The spectator survey yielded no respondents who were not there specifically for the event but, based on economic impact benchmark data from previous events of a similar scale, a 5% casual visitor assumption was applied. On this basis, there were circa **219,943 eligible spectators**.

Figure 2: Eligible spectators



ELIGIBLE SPECTATOR NUMBERS

The final part of Stage 1 is to classify the eligible spectators into the type of stayer they are. This was then used to estimate their accommodation spend in Stage 2.

They are split into three groups:

1. Those who stay in hotels or similar (commercial stayers);
2. Those who stay with friends or in a second home (non-commercial stayers); and
3. Those who are visiting for the day (day visitors).

Table 3: Spectator stay type

	Percentage of spectators	Number
Commercial stayer	56%	124,146
Non-commercial stayer	14%	30,303
Day visitor	30%	65,494

Based on the survey data, the spectators are split as shown in the table.

STAGE

2

APPLY SPECTATOR SPENDING PATTERNS (FOR ACCOMMODATION)

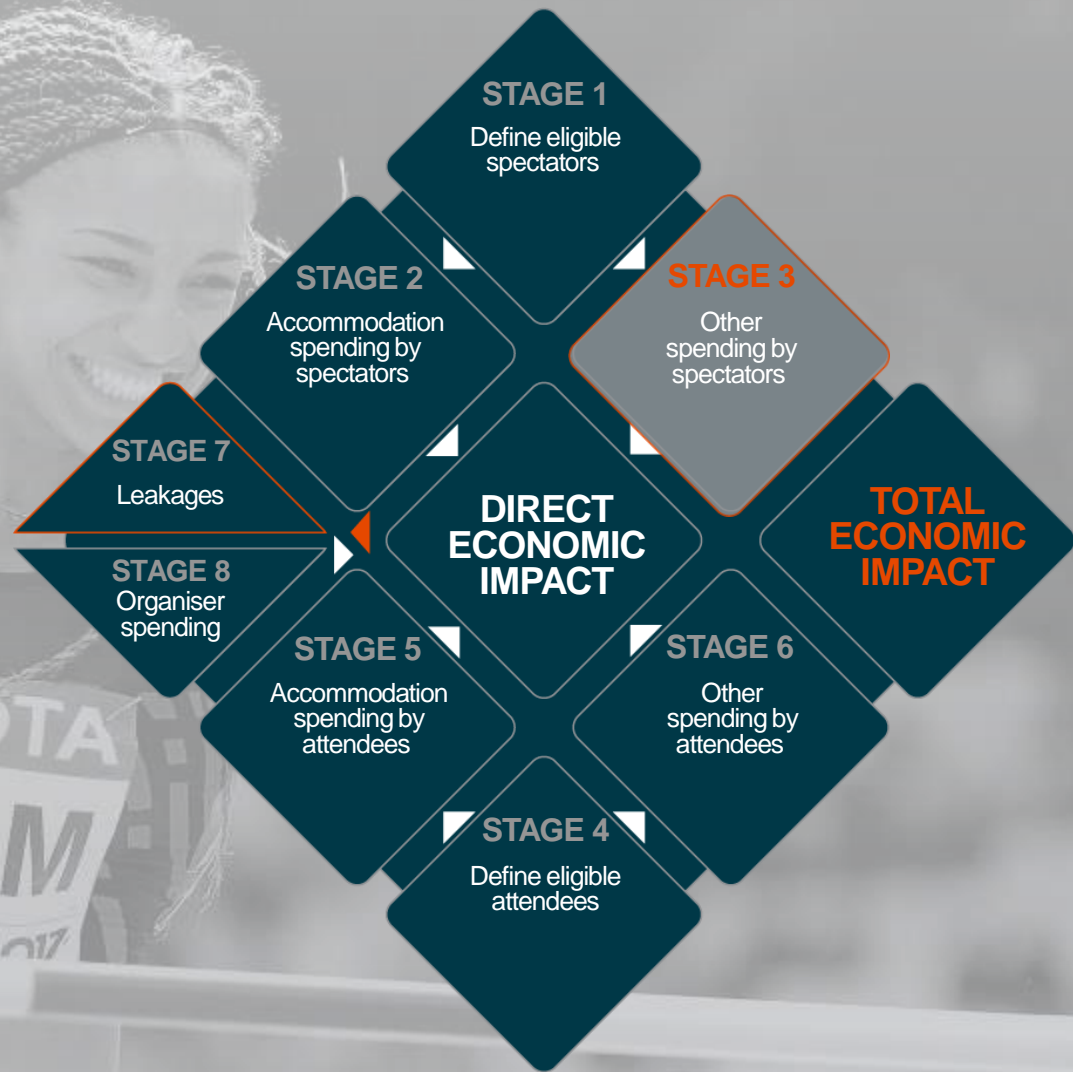
With the event-specific spectators identified, the process moved on to Stage 2 in which spending profiles for accommodation were applied to estimate the accommodation revenue. This is based on the number of commercial stayers from Stage 1 (i.e. those staying in hotels, etc.) and the number of nights on average they stayed.

Based on the spectator survey, the average number of nights spent in the host economy was 3 for commercial stayers. This gives a total number of bed nights generated of circa **372,437**.

In order to establish a typical room rate per night, an average of accommodation spend per person was applied from the spectator survey. Based on the assumption that spectators would share rooms, an average room rate per person per night of £60.53 was applied. When applied to the bed nights above, it showed a total revenue for the accommodation sector generated by spectators of **£22,543,622**



DIRECT ECONOMIC IMPACT



STAGE
3CALCULATE OTHER SPECTATOR SPEND
(NON-ACCOMMODATION)

Stage 3 estimates the other spend (i.e. spend not related to accommodation) for the event-specific spectators. This is based on the total number of eligible spectators identified in Stage 1, their average length of stay and their typical spend per day.

The total number of eligible spectators was **219,943** as identified in Stage 1. The average number of days spent in the host economy for spectators was **2.4 days**.

The average daily spend was identified via the spectator survey as is summarised on the right.

In total, these spending patterns generated **non-accommodation revenue of £34,390,545**.

As well as our spectator survey, an online version was also sent by Goodform to spectators who purchased a ticket to the Championships. The survey was distributed via e-mail following the session for which they had tickets to the event.

A total of 24,317 spectators responded to the survey. The survey asked spectators to estimate the daily spend on the categories identified above; however, it accounted for both individual spend and spend by direct family members. The average daily spend identified from the Goodform survey is summarised to the right.

The Goodform data indicated a daily spend that is over 100% more than our survey. However, as mentioned above, the majority of those spectators it attended with one other family member. Therefore, this suggests that the Goodform survey data is broadly in line with the spectator survey.

Table 4: TSC event spectator survey spend data

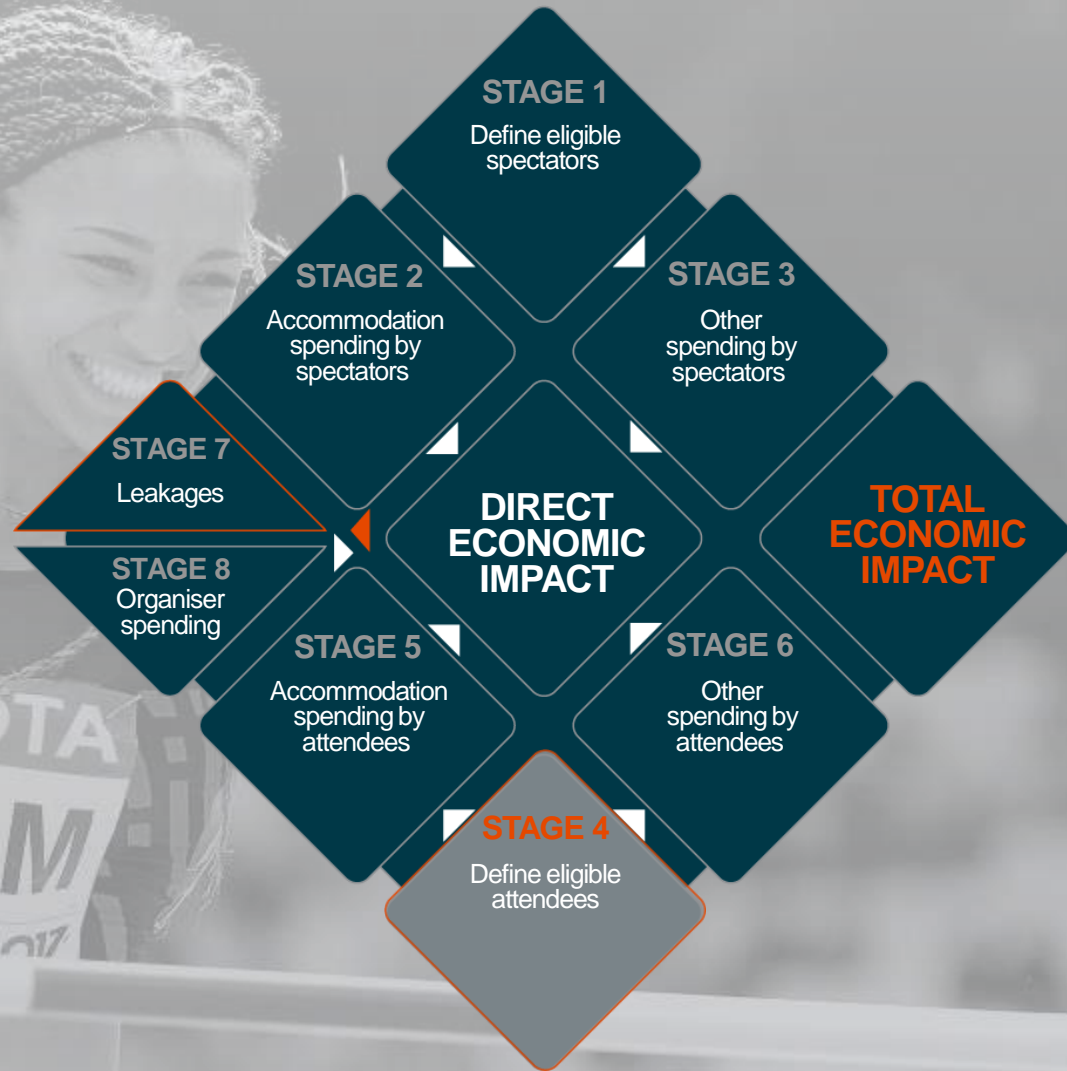
	General Admission
Meals & drinks	£29.86
Groceries	£5.03
Transport and travel within England	£21.25
Retail shopping	£8.89
Total:	£65.03

Table 5: Goodform event spectator survey spend data

	General Admission
Meals & drinks	£60.58
Groceries	£11.60
Transport and travel within England	£52.94
Retail shopping	£25.06
Total:	£150.18



**DIRECT
ECONOMIC
IMPACT**



ELIGIBLE OTHER ATTENDEE NUMBERS

In Stage 4, the focus moves from the spectators to the other people who attended the event (“other Attendees”). They are made up of the following groups:

- Teams
- Athlete representatives
- LOC
- IAAF
- Official partners / sponsors
- Technical suppliers
- Media
- VIPs
- Security
- National Federations
- Volunteers

Table 6: Total attendees

	No. Attending
Teams	3,471
Athlete representative	64
LOC	4,630
IAAF	638
Official partners / sponsors	681
Technical suppliers	543
Media	2,934
VIPs	267
Security	465
National Federations	91
Volunteers	2,913
Total:	16,697

The figures for each group have been estimated through consultation with the IAAF and the accreditation list and they are summarised above.

ELIGIBLE OTHER ATTENDEE NUMBERS

Overall, there were **16,697** other attendees. In a similar manner to spectators, the methodology now estimates the accommodation and non-accommodation spend generated by these attendees. In order to do this, the percentage of attendees resident in the host economy is established. This was based on the accreditation data provided by IAAF and is summarised below.

These assumptions produced a total number of non-local attendees of **14,508**.

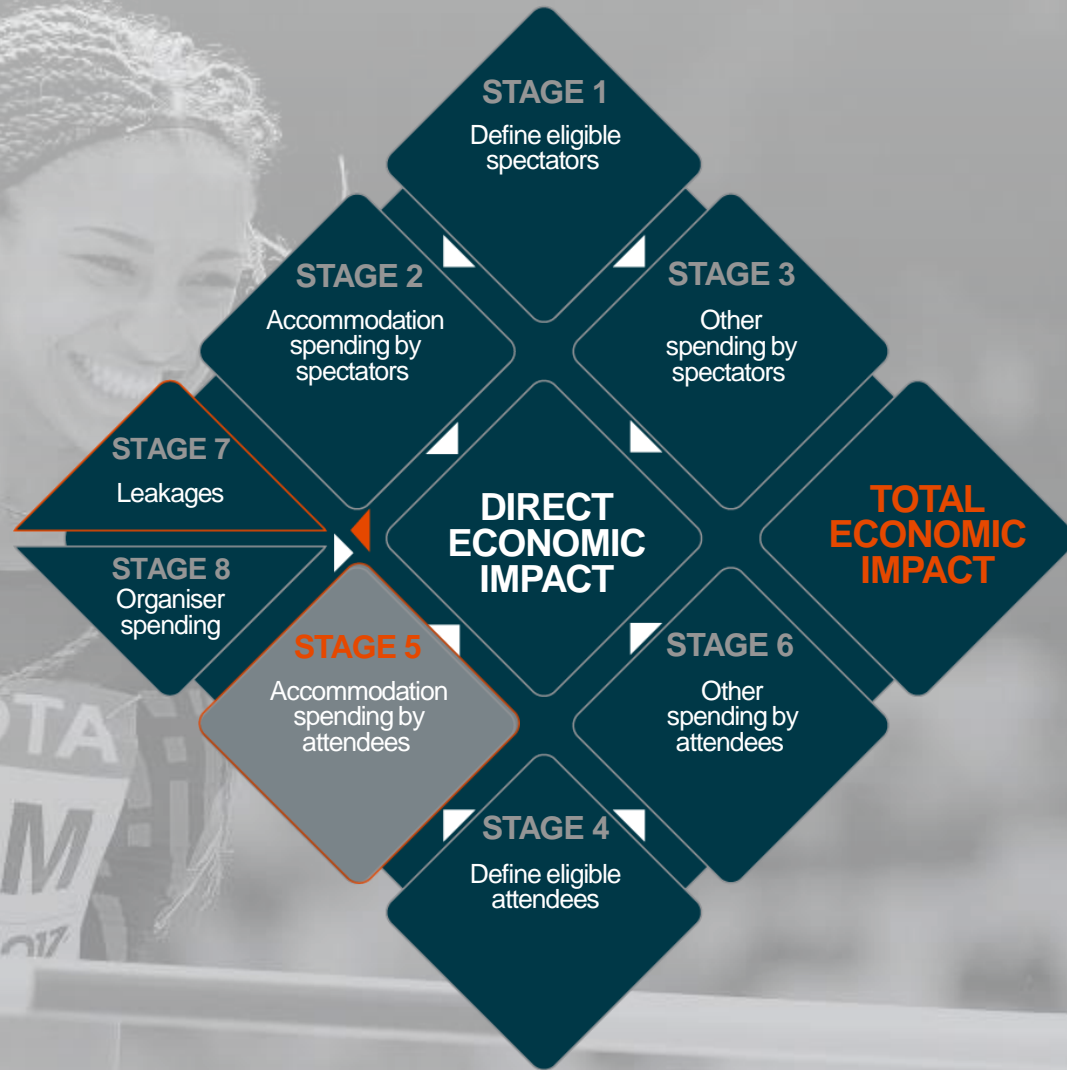
As with spectators, they were then separated into commercial, non-commercial and day visitors. It was assumed that all attendees were commercial stayers (i.e. resident in hotels for their stay), with the exception of the volunteers. From the volunteer survey, it was identified that 41% were resident in London. It was therefore assumed that 34% of volunteers were day visitors, while an equal split of those remaining were assumed as non-commercial stayers (33%) and commercial stayers (33%).

Table 7: % of attendees resident in the host economy

	% resident in host economy
Teams	1%
Athletes representatives	8%
LOC	12%
IAAF	3%
Official partners / sponsors	8%
Technical suppliers	5%
Media	5%
VIPs	38%
Security	10%
National Federations	2%
Volunteers	41%



**DIRECT
ECONOMIC
IMPACT**



STAGE

5

APPLY ATTENDEE SPENDING PATTERNS (IF APPLICABLE)

Having established the number of commercial stayer attendees, the next step is to apply typical spending profiles for accommodation to estimate the accommodation revenue. This is based on the number of commercial stayers from Stage 4 and the number of nights on average they stayed.

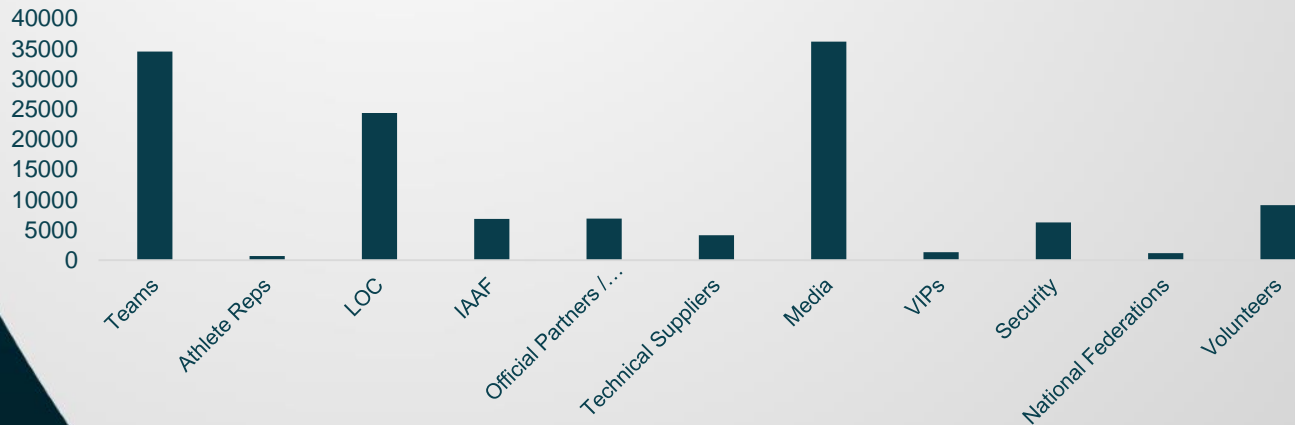
In terms of the days stayed, the accreditation list, attendee interviews and the volunteer survey the following results:

- Teams: 10 days
- Athlete representatives: 11 days
- LOC: 6 days
- IAAF: 11 days
- Official partners / sponsors: 11 days
- Technical suppliers: 8 days
- Media: 13 days
- VIPs: 8 days
- Security: 15 days
- National Federations: 13 days
- Volunteers: 16 days



Using this data gives a total **number of bed nights generated by the attendees of circa 131,385.**

Figure 4: Attendee total bed nights



APPLY ATTENDEE SPENDING PATTERNS (IF APPLICABLE)

With the number of bed nights established, it is now possible to estimate the total accommodation revenue generated by the attendees.

Data provided by Coporate and Sporting Event Management (CSE) was used to inform the room rate for all attendees, with the exception of volunteers and VIPs. The volunteer survey estimated the typical room rate for the volunteers, and an average was calculated for VIPs, based on their hotels from the accreditation list and the relative frequencies. Overall, the **average room rate was £165 per night**. When applied to the bed nights above, it showed a **total revenue for the accommodation sector generated by attendees of £21,613,592**.

Though this reflects the total revenue for the accommodation sector generated by attendees, it was taken into account that some of these costs were met by the LOC and included in the overall event budget. In order to ensure there was not double-counting of these amounts, the spend for some attendee groups were removed directly from the total accommodation attendee spend. Based on information provided by the LOC and IAAF, the following percentage assumptions were applied for LOC budget coverage of spend across the attendee groups.

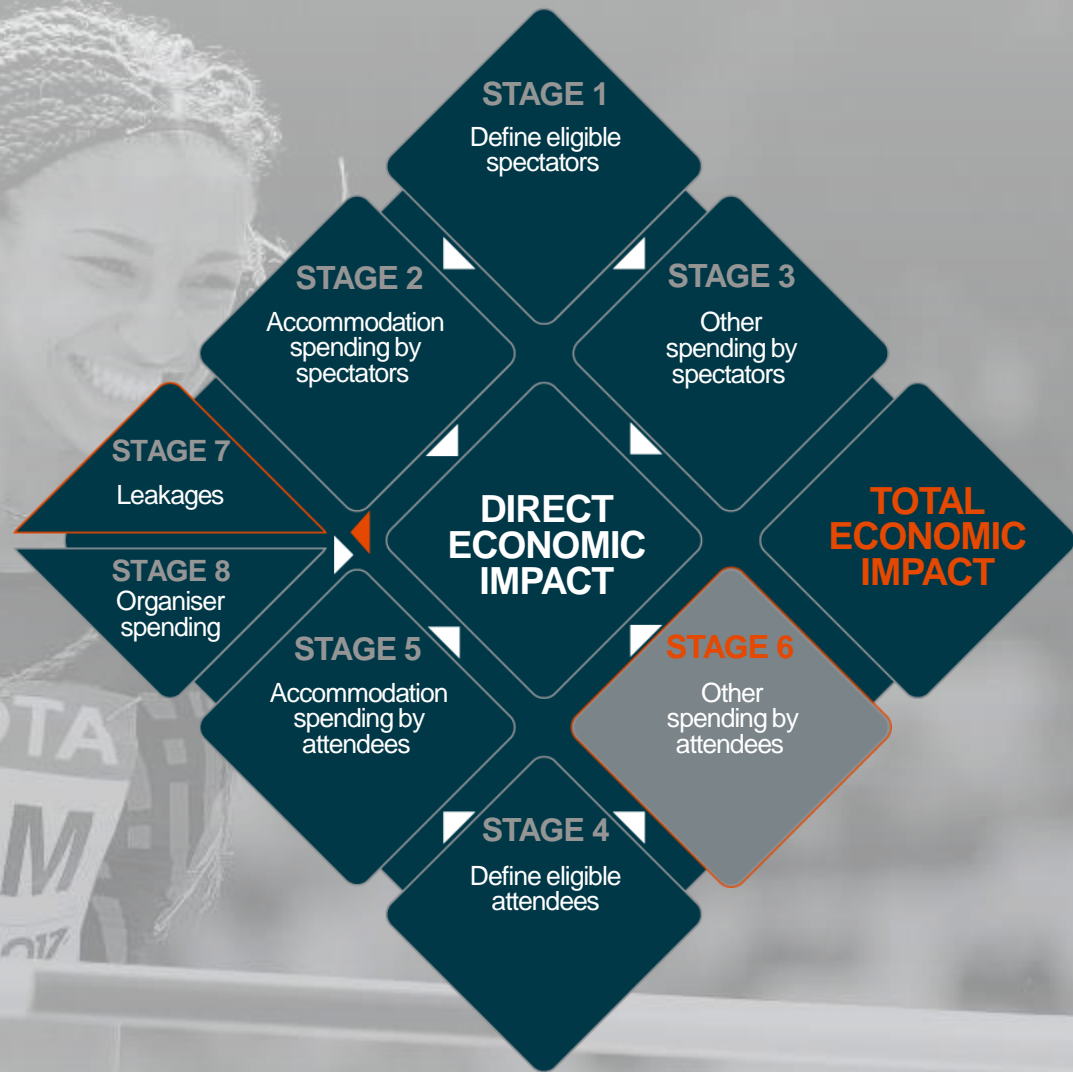
- Teams: 80%
- Athlete representatives: 80%
- LOC: 88%
- IAAF: 100%
- Official partners / sponsors: 25%
- Technical suppliers: 100%
- Media: 0%
- VIPs: 10%
- Security: 0%
- National Federations: 10%
- Volunteers: 0%

Through the application of these assumptions, it was estimated that there was **8,398 self-paying attendees** and **6,799 were non-local**. These attendees generated a total of **68,828 bed nights** at an **average room rate of £146 per night**.

This resulted in a **total revenue for the accommodation sector generated by eligible attendees of £10,078,390**.



**DIRECT
ECONOMIC
IMPACT**



STAGE

6

CALCULATE OTHER ATTENDEES SPEND (NON-ACCOMMODATION)



The Sports Consultancy

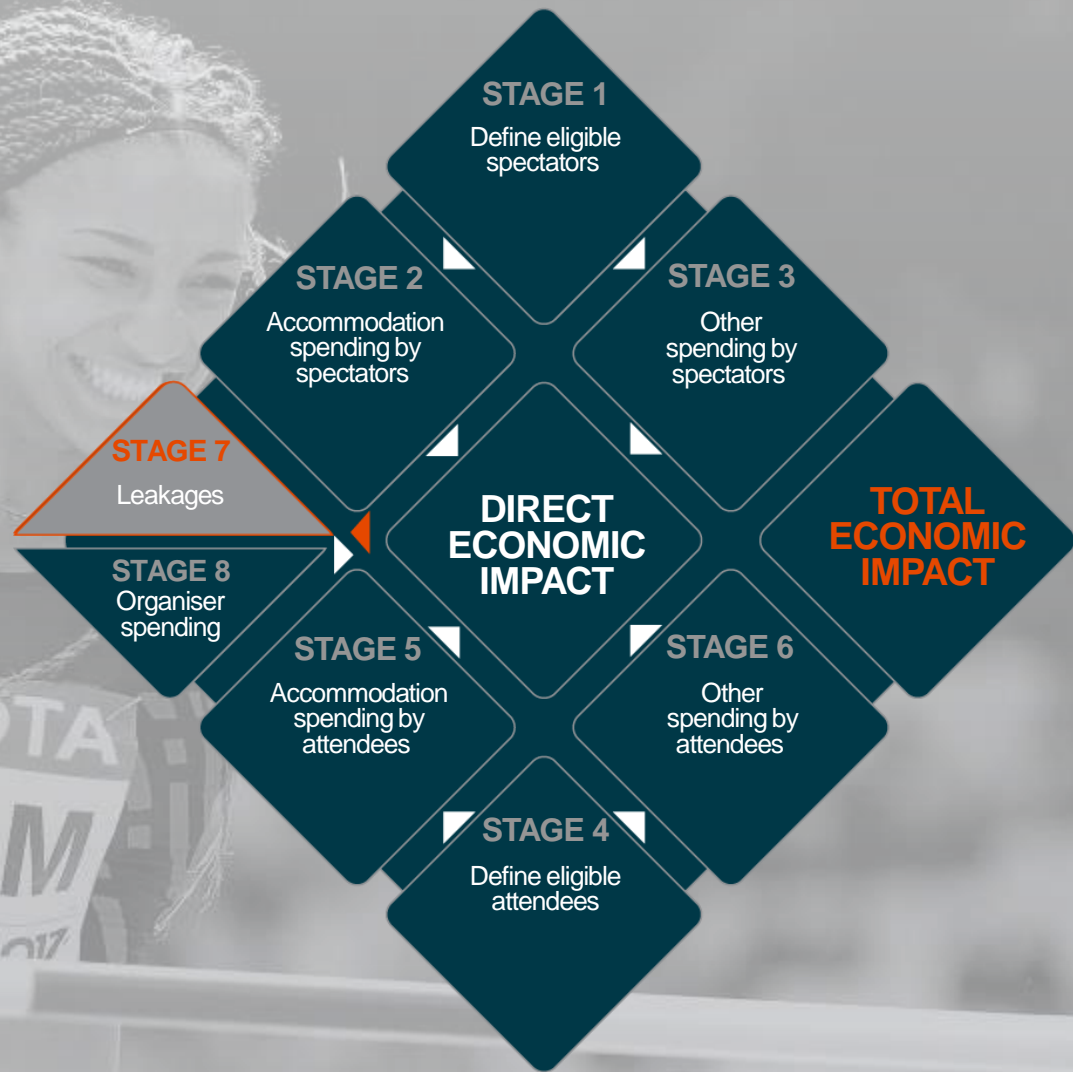
Stage 6 estimates the other spend (i.e. that not related to accommodation) for the attendees. This was based on the total number of eligible attendees identified in Stage 5, their average length of stay and their typical spend per day. The total number of eligible attendees was **6,799** as identified above through the LOC budget coverage of spend across the attendee groups. The average number of days spent in the host economy was **12.8**.

For teams, athlete representatives and national federations, the daily spend was based on the results from the athlete survey that was sent out via Survey Monkey. The daily spend for media, sponsors and VIPs was based on interviews conducted with attendee representatives, and the volunteer survey informed the volunteer spend.

In total, these spending patterns generated **non-accommodation revenue of £4,783,429**.



DIRECT ECONOMIC IMPACT



STAGE
7

ESTIMATE LEAKAGES

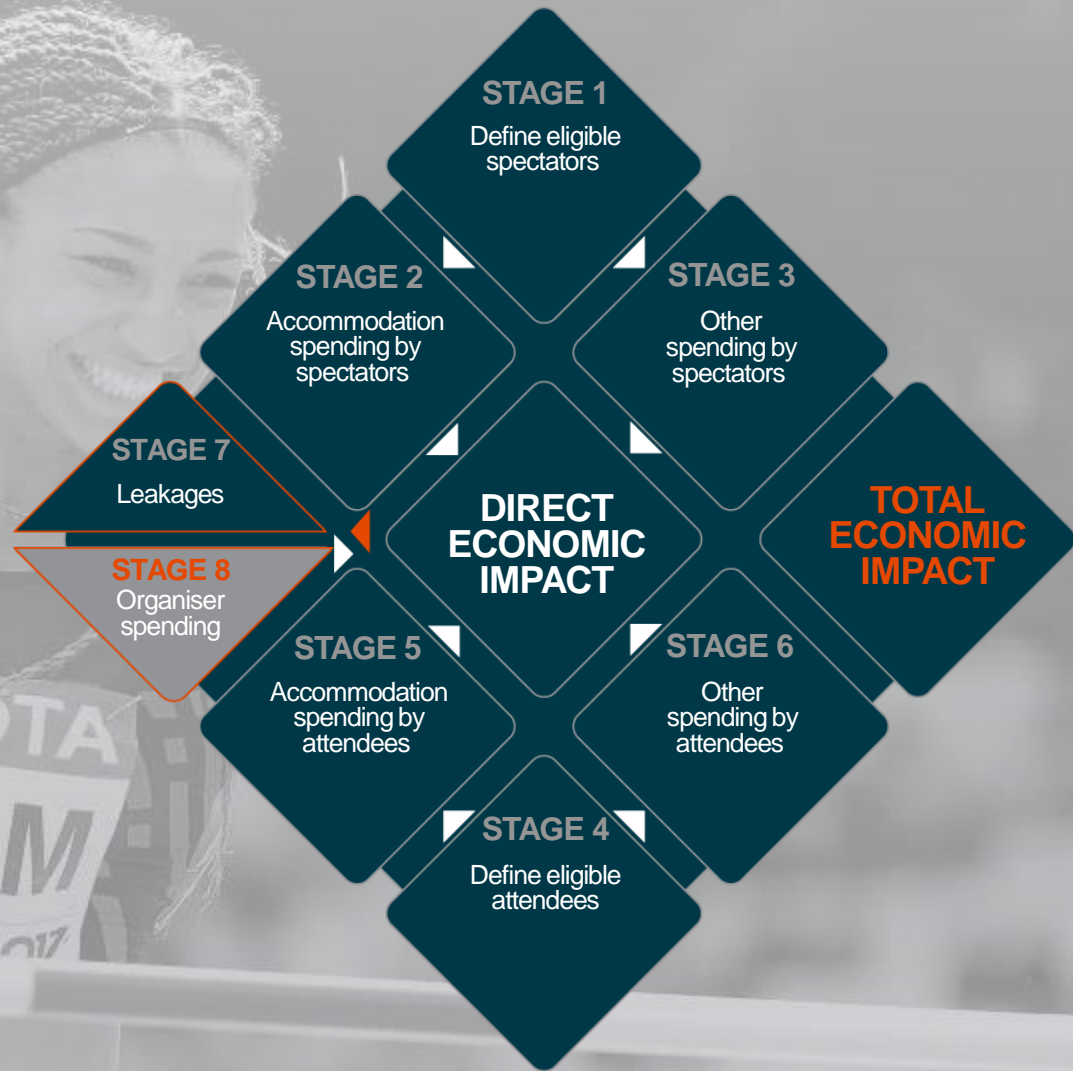
Stage 7 assesses the extent of the spending by spectators and attendees that would not be with local vendors (e.g. people staying or eating outside London and travelling into the city just for the event). Using the answers from the spectator survey, it was identified that 5.88% of hotels that spectators stayed in were located outside of Greater London. It has therefore been assumed that spectator leakages would be 5.88% across the spectator accommodation area and the non-accommodation spectator spend.

All attendees stayed within London, therefore it has been assumed no leakages in attendee spending.

This gives a **total leakages amount of £3,347,729.**



**DIRECT
ECONOMIC
IMPACT**



CALCULATE ORGANISER SPENDING IN THE HOST ECONOMY

The final stage of the assessment of direct economic impact is the net level of spending by the event organiser. The purpose was to estimate the proportion that was spent and retained within the host economy. This analysis was based on the event budget provided by IAAF, which itemised all expenditure by key categories and the supplier(s) the various transactions were made with. Overall, **£32.2 million out of a total expenditure of £56.8 million was directed at local suppliers.**

However, the analysis also took into account the income the event generated (and the proportion of it that specifically came from Greater London and the public-sector support it received). As this income originates from the host economy, it is effectively subsidising the expenditure made in the host economy. In terms of public sector support, the Championships benefitted from the following:

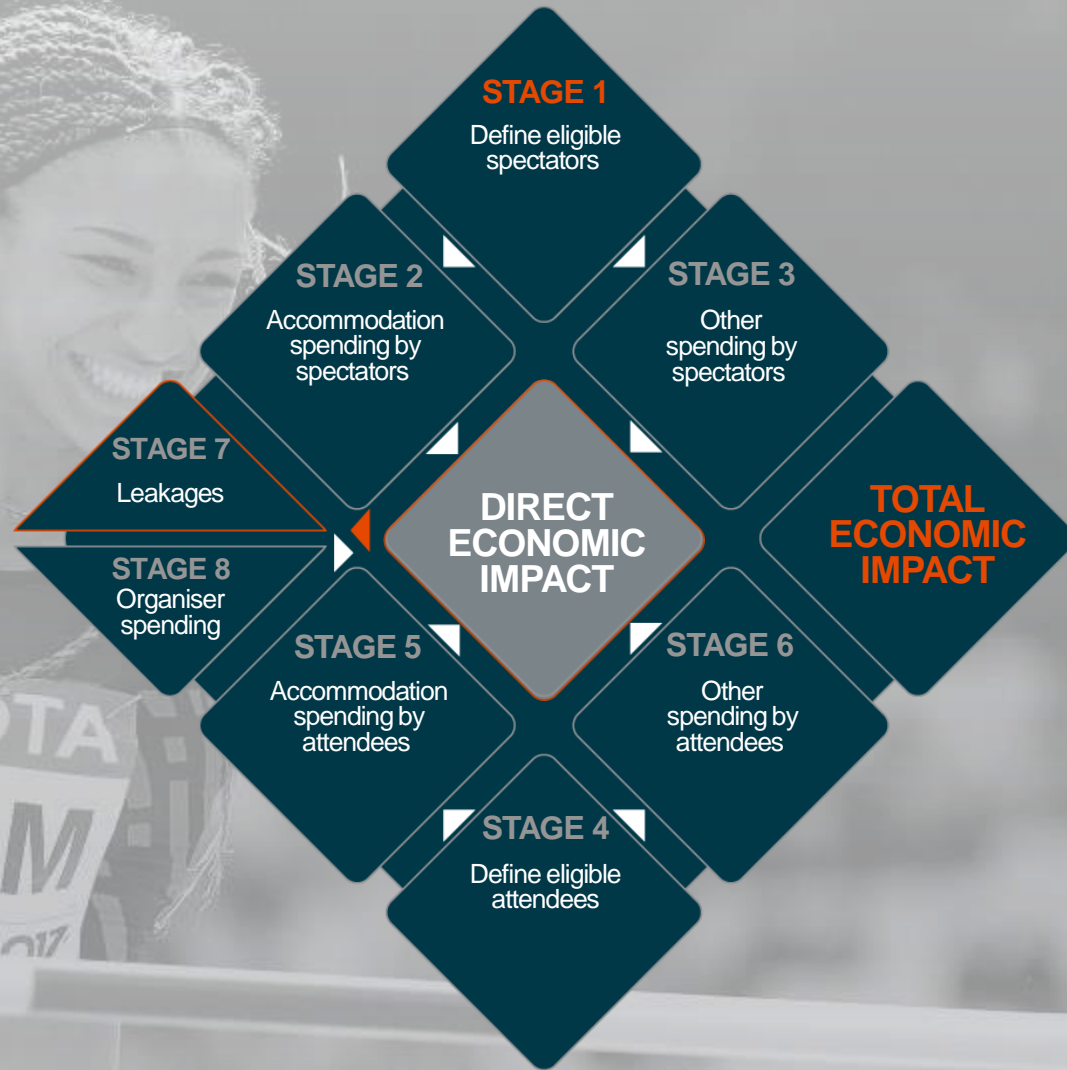
- UK Sport - £7,510,000
- GLA - £8,888,000
- GLA VIK Transport - £250,000
- IAAF - £60,000.

It was assumed that all of the GLA funding and VIK transport support originated from London. Of the UK Sport funding, it was assumed that the percentage from Greater London was in proportion with the population of London compared to the UK as a whole (13%). Finally, it was assumed that none of the IAAF funding originated from London. On this basis, the amount of public sector funding originating from London was estimated to be **£10,106,790.**

In overall terms therefore, the **net expenditure for the organiser in the host economy was £10,561,482.**



**DIRECT
ECONOMIC
IMPACT**



SUMMARY

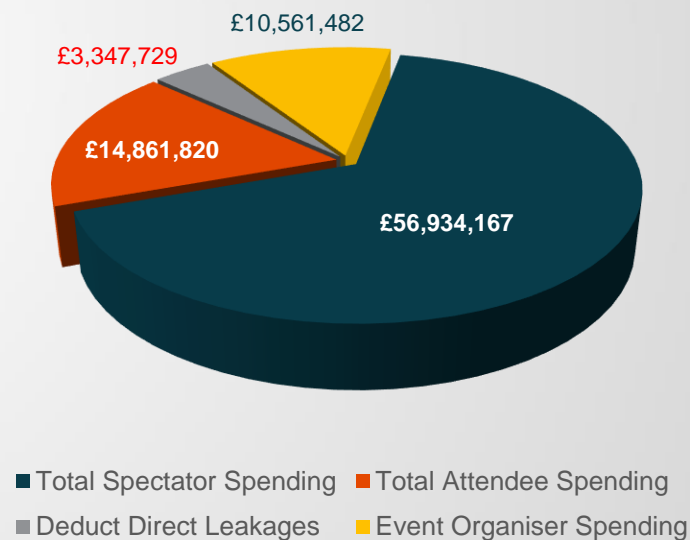
TOTAL DIRECT ECONOMIC IMPACT

Following Stages 1-8, an estimation of the direct economic impact broken down by the four key areas is summarised below. In total, it shows a **direct economic impact associated with the IAAF World Athletics Championships of £79,009,739**.

Table 8: Total direct economic impact

Total Spectator Spending	£56,934,167
Total Attendee Spending	£14,861,820
Deduct Direct Leakages	- £3,347,729
Event Organiser Spending	£10,561,482
TOTAL DIRECT ECONOMIC IMPACT	£79,009,739

Figure 5: Total direct economic impact





**INDIRECT,
INDUCED AND
TOTAL
ECONOMIC
IMPACT**

IDENTIFY A MULTIPLIER

As discussed in the introduction, this study has focused on the direct economic impact of the 2017 IAAF World Athletics Championships. However, an assessment of economic impact can also give consideration to secondary effects, such as indirect or “ripple” through the re-circulation of the initial spectator spend and induced, which relate to increases in employment and household income through the economic activity generated by the event. The primary components of these impacts comprise:

- Business-to-business impacts achieved largely by businesses investing in suppliers to deliver their requirements related to the event; and
- Consumer impacts as recipients of income associated with the event reinvest this money in the economy.

However, estimating multipliers is complex and dependent on the size and nature of the economy being considered. In simple terms, the larger the host economy, the lower the chance of leakage and the higher the value of the multiplier. To provide an indicative illustration of the potential indirect impact, an estimate has been provided based on our industry benchmark data for the multipliers applied to major sporting events held in London in recent years. These benchmarks are shown below:

Table 9: TSC and L&P multiplier benchmark data

Event	Location	Multiplier
2012 ATP World Tour Finals	London, UK	1.38
2015 Rugby World Cup	London, UK	1.9
RideLondon	London, UK	2.0
NFL International Series	London, UK	2.0
ITU World Triathlon Series	London, UK	2.0
Higher Education Sector Study	London, UK	2.02

Based on the principle of employing prudence, a multiplier range of between 1.38 and 2.02 has been applied. This gives an **indirect economic impact of between £30,023,701 and £80,589,934** and a **total economic impact of between £109,033,440 and £159,599,673**.

Further analysis of the total economic impact of the event, based on a 41.6% spending to Gross Value Added (GVA) event ratio employed by L&P, estimates that the Championships resulted in a **total contribution to GDP of between £45,357,911 and £66,393,464**



**SOCIAL
IMPACT**



THIS EVENT ATTRACTS A BALANCED DEMOGRAPHIC, WITH A HIGHER THAN AVERAGE SPENDING POWER

Fig 6: Respondent demographics: male / female split

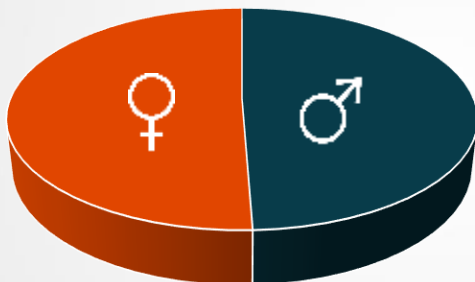


Fig 7: Respondent demographics: age breakdown

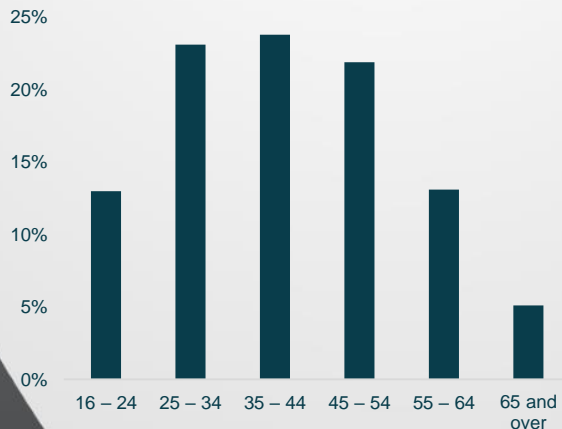
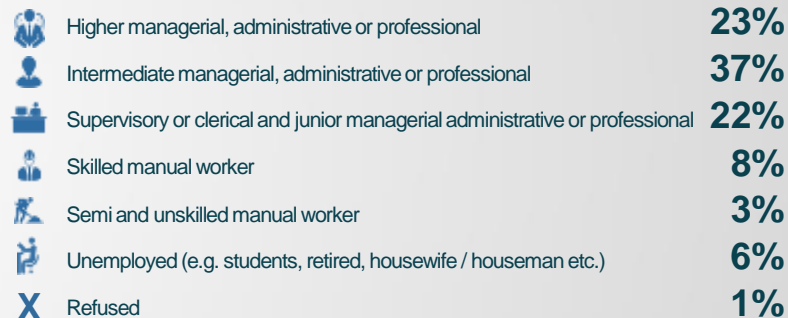


Fig 8: Respondent demographics: profession



A balanced demographic

- Of the 702 respondents to our survey, 51% were female, indicating a well balanced gender split.
- The age profile was heavily weighted towards the young and middle-aged: over 69% were aged between 25 and 54.
- The majority of respondents came from higher socio-economic backgrounds: 60% occupied higher or intermediate managerial positions.
- This demographic breakdown is likely to affect spending patterns and therefore improve the overall economic impact of the event for the host city and region, as shown by the spectator spending patterns set out in stage 3 of the economic impact assessment.
- The ethnic origin of the respondents to the survey was predominantly white (87% of all respondents).



A TOOL FOR INCREASING CIVIC PRIDE

London residents felt proud that their city was hosting the event and believe it left a positive impact

Fig 9: “I feel proud that London is hosting the IAAF World Championships”

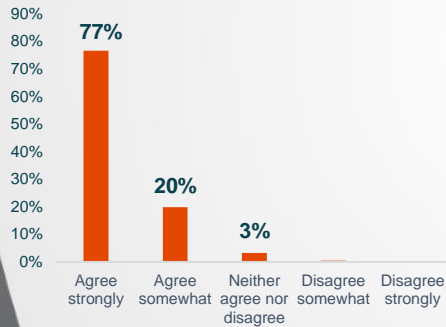


Fig 10: “Hosting the IAAF World Championships has had a positive impact on London’s communities”

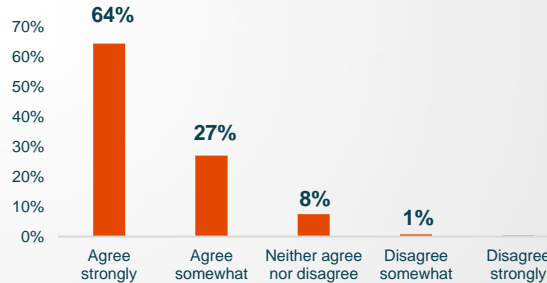
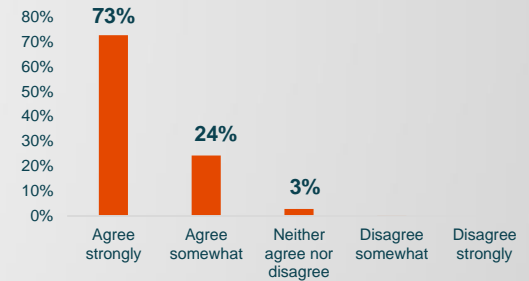


Fig 11: “Hosting the IAAF World Championships has showcased London as a positive and vibrant city”



Boost to civic pride in London

- Hosting the IAAF World Championships had a very positive effect on the local population – 97% of London respondents felt proud that London hosted the Championships.
- The group felt that the event had a positive impact on London’s communities – 91% of local respondents agreed with this sentiment.
- In addition, local residents felt the Championships showcased London as a positive and vibrant city – 97% of London respondents believed this to be true.



IMPACT ON NATIONAL AND INTERNATIONAL AWARENESS OF LONDON

Over 90% of non-local respondents would recommend London as a holiday destination as a result of their visit

Fig 12: “As a result of visiting the IAAF World Championships I would recommend London as a holiday destination”

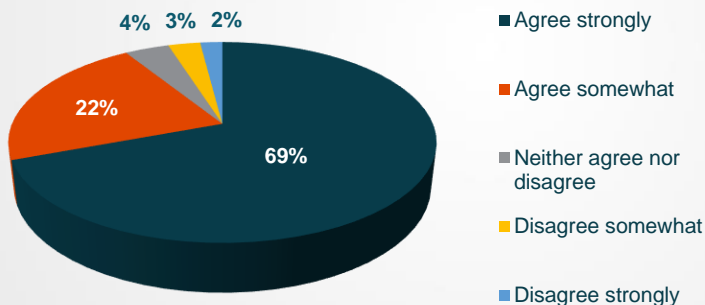


Fig 13: “As a result of attending the IAAF World Championships, I am more likely to return to London in the next two years”

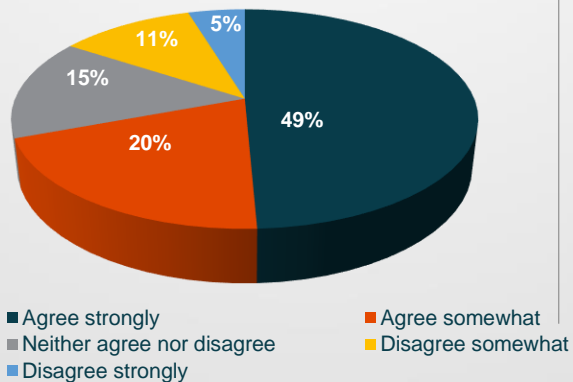
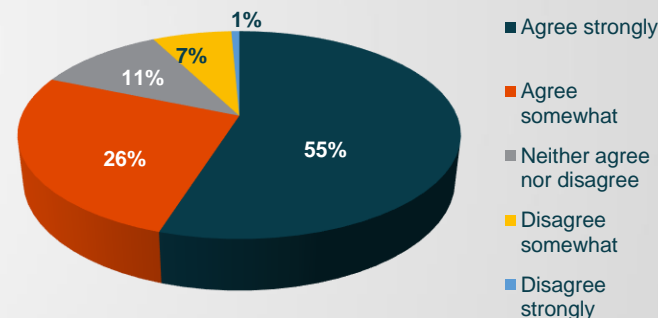


Fig 14: “Hosting the IAAF World Championships has increased my awareness of London as a tourist and/or business destination”



Visitors left with an increased awareness of the city and a desire to return

- Approximately 64% of those surveyed at the Championships were non-local: either from elsewhere in England/UK or other countries.
- Non-local respondents were highly positive about the impact the IAAF World Championships had on their perception of London.
- Over 90% of non-local respondents said they would recommend London as a holiday destination as a result of their trip.
- By hosting the IAAF World Championships, people’s awareness of London as a tourist and business destination increased significantly among the wider UK and international population attending the event.
- Of the 450 non-resident in London, 81% said that London’s hosting of the event had increased their awareness of the city and region. Most had already visited the city at least once before, but for 8% this was their first visit.
- In addition, 69% of visitors to the city stated that, due to attending the Championships, they were more likely to return to London in the next two years



SIGNIFICANT IMPACT ON ATTITUDES TOWARDS PARTICIPATION IN PHYSICAL ACTIVITY

Many respondents said they were more likely to be more active after their visit to the IAAF World Championships

43%

Of respondents said that attending the event inspired them to do sport or active recreation more than they would normally

Fig 16: In the 4 weeks prior to this event, on how many days did you take part in at least 30 minutes of sport or active recreation?

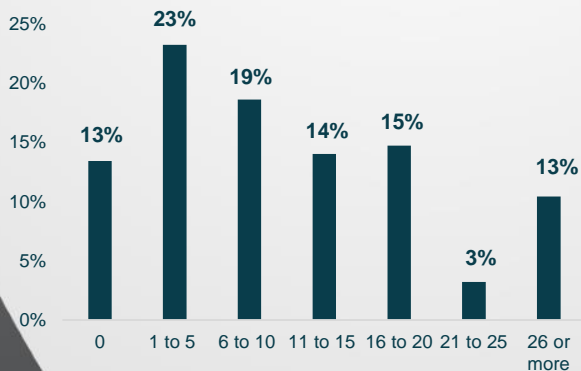
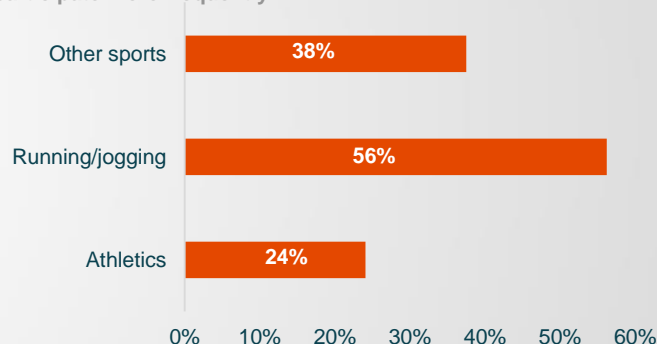


Fig 15: In which of the following respects do you feel inspired to participate more frequently?



An increase in physical activity and participation in athletics

- The respondents propensity to exercise varied – 37% had done minimal / no physical activity in the last four weeks, but 63% had exercised at least six times during this period.
- Attending the Championships had a positive, inspiring impact on respondents’ propensity to increase their physical activity; with 43% saying they would be more active as a result.
- Of this, the majority (56%) were inspired to participate more frequently in running or jogging – 24% were inspired to get into athletics and 38% said they would be looking into others sports. [N.B respondents could choose more than one option.]



ATTITUDE TO ATHLETICS EVENTS

Fig 17: In the last 5 years, how many other national or international athletics events have you visited?

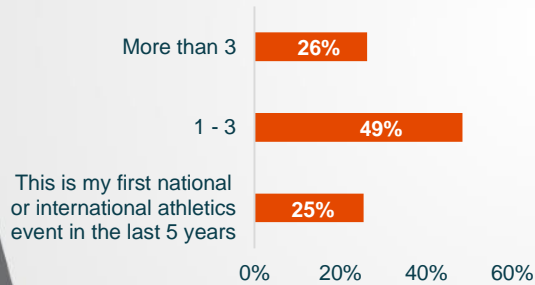


Fig 18: Did you also attend the World Para Athletics Championships held in London?

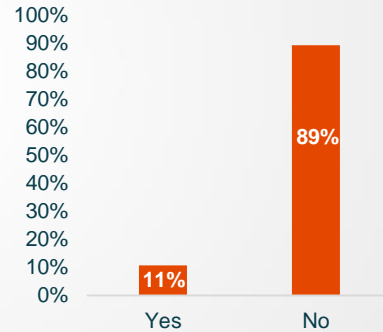


Fig 19: How many sessions of this event have you attended or will attend? (Total: 16 sessions)

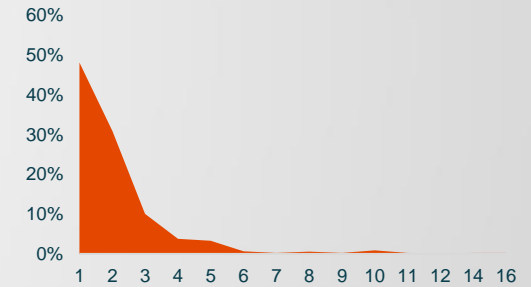
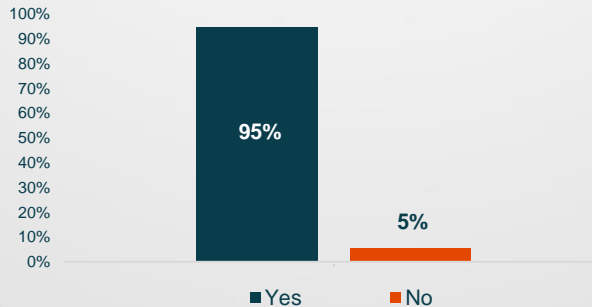


Fig 15: Is August the optimal time of year to hold the IAAF World Championships?



Attitude to Athletics

- Many of the respondents (75%) had been to a least one other international event in the past 5 years, but for 25% this event was their first.
- The vast majority (89%) were concentrating their visit on the IAAF event and had not attended the World Para Athletics Championships London.
- 79% of respondents were only attending 1 or 2 sessions, but 17% planned to attend 3-5 individual sessions.
- 95% of respondents felt that August was the optimal time of year to hold the IAAF World Championships.



METHODOLOGY
AND
LIMITATIONS



THE EVENTIMPACTS MODEL

As outlined in the introduction, this economic impact assessment has followed the eventIMPACTS methodology. This is a standard approach that has been developed in the UK by the Department for Culture, Media and Sport, UK Sport, Tourism Northern Ireland, Event Scotland, London & Partners and the Welsh Government.

The stages of the methodology are outlined in detail in the report. Further details can be found at <http://www.eventimpacts.com>.

A copy of the model used for this study is available as a separate document.



INCREASING THE ACCURACY OF THE REPORT

Our stakeholder analysis

As part of our economic impact analysis, we incorporated data – either through primary or secondary research – from the following stakeholder groups:



SPECTATORS

Whilst the Championships were being staged, we conducted interviews with 702 spectators to understand where they had travelled from, where they were staying, how long they were spending in London and their average daily spend.



SPONSORS AND SUPPLIERS

We spoke to key sponsors and suppliers to understand how much they spent on the ground at the event, through team deployment, activation and guest hosting.



TEAMS AND SUPPORT

Working on an average number of individuals (team, support staff, friends and family), we conducted research to understand how much was typically spent by each team entourage outside the quota provision from the LOC.



MEDIA / BROADCAST

We spoke to members of the media to understand how long they stayed in London, where they stayed and what their typical daily spend was.



IAAF

We spoke to both IAAF and local organisers to understand the budget for the event in more detail – principally, we looked to understand how many local suppliers were used and how this was absorbed into the local economy.



LOCAL ORGANISERS

REPORT

LIMITATIONS

This project has been undertaken under the terms of our engagement letter, which sets out details of the scope and limitations of our work and other important terms of business agreed between us. Our work, which is summarised in this report, has been limited to matters which we have identified that appear to us to be of significance within the context of our scope.

This report is confidential to the IAAF and prepared solely for the purpose set out in our engagement letter. In preparing this report our only responsibility and duty of care is to the IAAF.

Some of the matters covered in this report are by their nature technical. The intended recipient of the report, the IAAF, is familiar with the issues, facts and other matters addressed and the report was written with that in mind.

If the IAAF wishes to make this report available to other parties, it does so on the condition that we do not assume or accept or owe any responsibility or duty of care to any person other than the IAAF. Accordingly, any person other than the IAAF who, contrary to the above, chooses to rely on this report, does so at their own risk and The Sports Consultancy will not be responsible for any losses of any such persons caused by their reliance on this report.

The report has been prepared principally from information supplied by and obtained from discussions with IAAF management, documents and data provided by the IAAF, from a survey of event spectators, consultations with event sponsors and stakeholders or from publicly available sources.

As agreed with the IAAF in our engagement letter, unless otherwise stated in our report, we have not sought to verify the information provided to us or contained herein nor to perform the procedures necessary to enable us to express an audit opinion on any of the financial or non-financial information contained in this report. Indeed, as you will appreciate, much of the additional, non-financial information contained in this report cannot be subjected to audit or otherwise independently verified.

We have assumed that the IAAF has drawn to our attention all matters of which you are aware concerning the project and which may have an impact on our work and the report. Accordingly, we accept no liability howsoever arising, directly or indirectly, from any error or incompleteness of fact or opinion in this report to the extent caused by inaccuracies or incompleteness in the information on which we have relied.



The Sports Consultancy

CONTACT

SIAN JENKINS

sian@thesportsconsultancy.com

+44 7827 356 510