Host Cities

- Impact on room nights is comparable between provincial, national and international events (hundreds of thousand room nights lost in Canada)
- Most host cities have closed offices temporarily however some layoffs have occurred for a third of host cities in Canada
- A small number of sport event host locations have identified that they will not be able to bid for or host events following the COVID-19 crisis
- Return to hosting timeline is projected to be
  - 37% - 1 month
  - 34% - 1-3 months
  - 16% - 3-6 months
  - 13% - 6 months to 1 year
- Corporate sponsor revenue (71%) and financial resources and participant retention identified as the biggest barriers to getting back to an "event-ready" state (66% of respondents). Funding support from government was identified by 61% of host cities.
- Other barriers identified by a majority of host cities were:
  - Venue readiness - 55%
  - Accommodations availability - 53%
  - Volunteer resources - 53%
- Cities identified that they were moderately prepared (average of 3.1 out of 5)
- Cities that have sport tourism within government structure have longer timeframe to be able to sustain current period with no bidding or hosting. Cities that are funded by hotel generated revenues or are arms length to public sector are more likely to not be able to survive beyond 3 months on the low side to 18 months on the high side
- CSTA Support required to host cities
  - Information about funding and other aid programs
  - Provide information about current state and future bidding and hosting opportunities based on shifting landscape
  - Advocate for funding support as recovery mechanism and to shorten return to hosting cycle. Sport tourism is key initiative to induce travel (local, provincial, national and international)
  - Recognition of event hosting in tourism aid funding
  - Advocate for events to return to cities that had been awarded and lost events; Federal government for funding support programs, create awareness piece for elected officials and boards
  - Communicate to government about importance of funding events
  - Preparedness for the recovery
  - Streamlined process, documents and templates for once event hosts are ready to initiate planning
  - Event bidding and hosting opportunities and rescheduling
  - Consistent updates specific to sport events
  - Marketing initiatives that encourage volunteers and the community to participate
  - Virtual Sport Event Exchange
  - Strategies to retain and obtain new corporate sponsor revenue
  - Provide mechanism to look at options for hosting (i.e. smaller centres) depending on local public health realities
  - Athlete/participant confidence and sponsor revenue to events
  - Sport tourism has a voice with Destination Canada, Business Events Canada, TIAC and others
  - Link between host cities and NSOs

- No affordable event insurance to cover pandemics - result is significant losses

Sport Organizations

- Over 100,000 room nights lost - highest quantity National then international followed by 28.000
- Workforce adjustments most work from home (95%), 43% closed office temporarily, 11% laid off staff and combination of reduced hours and pay cuts (16%), 2% have closed office permanently
- 98% of sport organizations will have ability to host or stage events 2% not following Covid-19
  - 55% within 3 months
  - 23% 3-6 months
  - 22% more than 6 months
- Largest barriers for return are financial and funding support, venue readiness and access to flights, accommodations and retention of participants
- Sport organizations were slightly less prepared than host cities for such a pandemic
- Dependency between rights holders and other organizations shows a consolidated approach to recovery
  - Universities and U Sports
  - LOC and revenue generation - sponsor and ticketing
  - Layoffs in other organizations
  - Training cycles to ensure athlete/team prep
  - Public confidence to purchase tickets
  - Public health directives on gatherings
  - Timing of qualifying events to ensure rep in higher level events
  - Access to facilities which are municipally owned
  - Restaurant/food service availability
- CSTA supports
  - Gather best practices
  - Sport tourism low on pecking order for support - lobby
  - More information on best way for NSO/sports to engage with tourism - tourism needs to be patient as sports do not know when hosting will normalize
  - Connection for sport and tourism (Exchange) - many layoffs since then
- Insurance issues
  - Force majeure does not provide any coverage through insurance or otherwise for losses
  - Provide supports to local hosts in event of cancellation
  - Some hotels were not accommodating in cancellations
  - Premiums too high - prohibitive
  - Opportunity for consolidated approach on insurance for industry - business interruption too costly and this could be opportunity for government standards or guidance
- Cancellation timeframe
  - 50% - through June 2020
  - 38% - through September 2020
  - 12% - beyond December 2020

Data Analysis

Question	City	Sport	Notes
Q2 - Room nights lost	Prov 46,000 Nat 41,000 Int 44,000	Prov 28,000 Nat 50,000 Int 41,000	Impact on hotel partners is significant and opportunity to support hotel reopening in phased and progressive way
Q3 - WFA	Closed temp 50% WFH 92% Closed perm 8% Laid off staff 35%	Closed temp 43% WFH 95% Closed perm 11% Laid off staff 16%	Adaptive response comparable between host cities and sport organizations; risk for recovery in that both host cities (35%) and sport orgs (16%) have laid off staff and permanent closures (8% host cities and 11% sport organizations or RH)
Q4 - Host following C19	Yes 94% No 6%	Yes 98% No 2%	Most will be able to host again but 6% of cities and 2% of sport orgs have ceased operations
Q5 - Time to event-ready	1 m - 34% 1-3 m - 38% 3-6 m - 17% 6-12 m - 11% >12 m - 0%	1 m - 14% 1-3 m - 41% 3-6 m - 23% 6-12 m - 20% >12 m - 2%	Host cities are ahead of sport organizations in their projections to be event-ready to host in the future (72% within 3 months) where majority of sport orgs project to be ready by 6 months (77%)
Q6 Barriers to back to business	Corp sponsor revenue 71% Financial resources 69% Participant retention 65% Funding support (govt) 63% Volunteer resources 54%	Financial resources Funding support Venue readiness (T) Accommodations/flights/ participant retention	Financial impacts are the biggest barriers followed by tourism, venue and participants including volunteers
Preparedness (1-5)	1-2 - 30% 3 - 42% 4-5 - 28%	1-2 - 50% 3 - 30% 4-5 - 20%	Host cities were slightly more prepared than sport organizations