



2014 World Rowing Championships

- economic impact
- visitor and volunteer satisfaction

COLOFON

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Samenvatting

1. Economische impact World Rowing Championships 2014

Van 24 tot 31 augustus 2014 vond op de Bosbaan in Amsterdam de World Rowing Championships (WRC) plaats. Met het oog op de verdere ontwikkeling van het evenement wil de World Rowing Federation (FISA inzicht krijgen in de economische impact van dit evenement. Zij heeft de Hogeschool van Amsterdam in samenwerking met Hogeschool Inholland en Sport2B gevraagd hier onderzoek naar te doen. Daarnaast heeft de FISA enkele aanvullende vragen geformuleerd over de tevredenheid van bezoekers en vrijwilligers.

Bezoekers

Het bezoekersaantal wordt geschat op 40.000, waarvan 30.000 unieke bezoekers. Buitenlandse bezoekers besteedden gemiddeld 77 euro per dag, Nederlandse bezoekers 27 euro en Amsterdamse bezoekers 20 euro. De bezoekers waren goed voor 28.500 overnachtingen in de dagen rondom het evenement. De totale bestedingsimpuls gerealiseerd door bezoekers bedroeg 3,1 miljoen.

Deelnemers

In totaal namen 1.800 atleten en begeleiders deel aan het evenement. Conservatief geschat gaven de deelnemers gemiddeld 25 euro per dag uit. De totale additionele uitgaven van atleten en begeleiders komen daarmee op 534.000 euro. In totaal waren de atleten goed voor 19.500 overnachtingen. De totale uitgaven voor de accommodatie komen daarmee op meer dan 2 miljoen euro. Zes nationale teams hebben als voorbereiding op WRC in juni deelgenomen aan de International Rowing Regatta Amsterdam (IRRA), dit genereerde een lokale economische impact van 149.000 euro. De totale bestedingsimpuls gerealiseerd door deelnemers bedroeg 2,7 miljoen euro.

Organisatie en media

Het saldo van in- en uitgaande geldstromen veroorzaakt door de organisatie en de media bedroeg 0,8 miljoen euro.

De totale directe en indirecte economische impact: 9,2 miljoen euro.

2. Tevredenheid van bezoekers en vrijwilligers World Rowing Championships 2014

Bezoekers

Bezoekers waarden het evenement gemiddeld met een rapportcijfer 8. De bezoekers zijn over alle elementen van het evenement tevreden. Als meest positieve aspect worden zowel inrichting/aankleding van de locatie als de sfeer tijdens het evenement genoemd.

Vrijwilligers

Vrijwilligers waarden het evenement gemiddeld met een rapportcijfer van 8,3. De vrijwilligers zijn vooral zeer tevreden over de accommodatie, de sfeer en de zorg en hulpvaardigheid van de organisatie. Als verbeterpunten komen de informatieverstrekking vooraf, de informatieverstrekking tijdens het evenement en de bewegwijzering naar voren.



Summary

1. Economic impact of 2014 World Rowing Championships

The World Rowing Championships (WRC) took place at Amsterdam's Bosbaan from 24 to 31 August 2014. To facilitate future development of this event, the World Rowing Federation (FISA) decided to gain more insight into its economic impact. To that end, FISA commissioned a collaborative economic impact study between the Amsterdam University of Applied Sciences (AUAS), Inholland University and Sport2B. In addition, FISA drew up supplementary questionnaires aimed at obtaining satisfaction ratings for visitors and volunteers.

Visitors

The number of visitors was estimated at a total of 40,000, some 30,000 of which were unique visitors. On average, daily spending came to 77 euros for foreign visitors, 27 euros for non-local Dutch visitors and 20 euros for Amsterdam residents. The combined number of overnight stays for the visitors during the dates of the event came to 28,500. In all, additional visitor spending amounted to 3.1 million euros.

Athletes

In total, 1,800 athletes and instructors participated in the event. Their daily average expenditures have been conservatively estimated at 25 euros. That brings the total additional expenditures for athletes and coaches to 534,000 euros. Together, the athletes accounted for 19,500 overnight stays, bringing the total spent on accommodations to over 2 million euros.

In a forerunner to the event in June, six national teams participated in the International Rowing Regatta Amsterdam (IRRA). In its economic impact, this generated spending of 149,000 euros in the local economy. The total additional spending by participants came to 2.7 million euros.

Organisation and Media

The balance of the incoming and outgoing flows of money associated with the organisation of the event and media coverage amounted to 0.8 million euros.

The event's total direct and indirect economic impact: 9.2 million euros.

2. Visitor and volunteer satisfaction ratings for 2014 World Rowing Championships

Visitors

The event received an average visitor satisfaction rating of 8. The visitors expressed satisfaction with all aspects of the event. The most positive responses were concerning the set-up/presentation at the location and the event's overall atmosphere.

Volunteers

The average satisfaction rating for volunteers in the event was 8.3. The volunteers were especially satisfied with the accommodations, atmosphere, and the organisation's consideration and helpfulness. Areas identified for improvement were pre-event information provision, in-event information provision and directional signs.



Introduction

The World Rowing Championships (WRC) took place at Amsterdam's Bosbaan from 24 to 31 August 2014. In organising this event, the World Rowing Federation (FISA) raised the bar for world class rowing events. Athletes, spectators, sponsors and rowing fans around the world followed the event on different media platforms. Those who were able to attend in person enjoyed an exciting sporting competition, as well as Amsterdam's scenic sites and festive atmosphere. Behind the scenes, hundreds of volunteers worked to make this event possible.

The 2014 WRC in Amsterdam was a flagship event for international rowing. In addition, FISA believes the event was beneficial to the city. It generated valuable international media coverage for the city and attracted large

numbers of spectators who, together with the organizing committee, international delegations, sponsors and media representatives provided a boost for the local economy.

On recognising the importance of this event's economic impact on Amsterdam and its potential impact on future host cities, FISA made a proactive decision to initiate the collection of facts, figures and other data on this event. To that end, FISA commissioned a collaborative economic impact study carried out by the Amsterdam University of Applied Sciences (AUAS), Inholland University and Sport2B. This report presents the results of the study, which will be discussed in the following order:

1. the economic impact of the World Rowing Championships;
2. the satisfaction of visitors and volunteers





PART 1

Economic impact of 2014 World Rowing Championships



Measuring economic impact

The economic impact of an event is always related to the specific geographical area where it takes place. Since the 2014 WRC was held in Amsterdam, it impacted the city's local economy.

The economic impact of an event is defined by the additional spending by parties associated with the event, i.e. visitors, athletes, organizing committee, etc. The term "additional spending" also indicates that the spending:

- is directly related to the event, and would not have occurred without it; and
- is new, extra money, originating elsewhere and flowing into the specific geographical area.

This report presents the economic impact generated by the spending of four groups: WRC participants; WRC visitors; the WRC organisation and media representatives attending the WRC.

Research methods

Several research methods were used to determine the net additional spending by the four groups.

To determine the net additional spending by visitors, students, (supervised by the universities), carried out a survey. During the event, they interviewed 455 visitors about their spending behaviour. Using a standard questionnaire, they collected information on a number of different aspects.

To determine spending by athletes and their coaches, we relied on information from the local organising committee responsible for all the hotel reservations for the national delegations. This provided insight into the duration of their stays and price of accommodations. For information on the daily spending by athletes and team staff, we used estimates based on studies of other major sporting events. For international visitors and athletes, who likely flew into Amsterdam, we added the Schiphol Amsterdam Airport fees to their spending.

We calculated the net additional spending of the organisation by analysing the event budget. In meetings and telephone calls with members of the local organising committee, we determined the sources and destinations of all income and spending.

Media spending was calculated based on information from the local organising committee and the host broadcaster (NOS). Using the number of media accreditations, the average number of NOS crew members present during the event, and estimates for their daily spending and price of accommodations, we were able to determine the total additional spending by media representatives.

The data and estimates compiled were entered into a proven economic analysis model¹ to determine the total economic impact of the 2014 WRC on Amsterdam's local economy.

¹ All of the questionnaires used in this study adhere – both in content and structure – to the guidelines established by the WESP (Working Group on Evaluation of Sporting events), a Dutch platform that oversees the quality of research on sporting events. The AUAS and Sport2B are both members of the WESP.

Pilot study based on actual data and estimates

This economic impact study is the result of an agreement between FISA, Sport2B and the Amsterdam University of Applied Sciences (working in cooperation with Inholland University) to join in a collaborative effort to gain more insight into the impact of FISA's rowing events.

This agreement was reached during the final days of the 2014 WRC. Coincidentally, the AUAS had already initiated a student-conducted visitor survey during the 2014 WRC. Although this survey was not specifically designed for a full swing economic impact study, many of its findings were useful in the analysis. In some cases, where actual data was not available, we were forced to rely on estimates based on insights from other studies on major sporting events.

Given the findings of this pilot study, future impact studies of FISA events would benefit from pre-event preparation, a specially designed questionnaire and sample group

selection based on carefully chosen criteria. These measures will guarantee better data, minimise the use of estimates and improve the quality of the study results.

The satisfaction survey for visitors was combined with the questionnaires used to collect the spending insights. A separate, more specific questionnaire was used to evaluate satisfaction among volunteers. Volunteers were asked to not only rate their satisfaction on various aspects of the event, but also to rate the importance of those aspects. A result matrix² was generated based on comparisons of the values for satisfaction and importance, which consisted of four quadrants: maintain, improve, monitor and maintain as a low priority. This analysis creates a clear overview of the aspects of the event that should be maintained and those requiring improvement.

² This priority matrix adheres – both in content and structure – to the guidelines established by the WESP (Working Group on Evaluation of Sporting events), a Dutch platform that oversees the quality of research on sporting events. The AUAS and Sport2B are both members of the WESP.

Visitors

To analyse visitor spending, we started by determining the number of people attending the 2014 WRC. Because of the partly open nature of the event and the lack of automated counting systems, we were forced to rely on estimates from the local organising committee. According to their estimate, the event generated 40,000 site visits. Of those, the final Saturday and Sunday witnessed 7,000 and 10,000 visits, respectively. Ticketing information shows that these visits were made by around 30,000 unique visitors.

Daytime spending

The 40,000 visits to the WRC resulted in visitor spending at the venue and elsewhere in Amsterdam. In addition, international visitors indicated that their trip to the 2014 WRC also included days on which they did not attend the event. Many of them stayed longer than the nine-day event itself. Based on the number of overnight stays, we concluded that the 3,300 international visitors spent a combined total of 8,000 days at the WRC and another 12,500 days enjoying sites outside the venue. The visitor survey showed an average daily spending by local visitors of 20 euros. Visitors

from elsewhere in the Netherlands spent 27 euros. International visitors spent around 77 euros. Thus, the total additional (daytime) visitor spending came to 2,189,000 euros (1,590,000 euros after correction)³.

Spending related to overnight stays

More than 5,500 visitors to the 2014 WRC spent one or more nights in Amsterdam. Based on the available data, the 2,300 national and 3,200 international visitors accounted for 28,500 additional overnight stays. International visitors (20,500 overnight stays) paid an average of 61 euros per person, per night for accommodations. Many Dutch visitors (8,000 overnight stays) stayed with friends or family, lowering the average accommodation price to 27 euros. Total (additional) spending on accommodations added up to 1,464,000 euros.

Together, daytime spending and spending on accommodations by visitors to the 2014 WRC generated a positive impact of 3.1 million euros on Amsterdam's economy.

³ Visitors spent € 600,000 on tickets and parking. This sum was collected and (re)spent by the local organising committee. To avoid double counting, its economic impact is covered in the section on "Organisation," and visitor spending was adjusted from € 2,189,000 to € 1,590,000.



Athletes

Based on information from the local organising committee (who made hotel reservations for all the national teams) and the Dutch Rowing Association (KNRB), we determined that around 1,800 athletes and coaches participated in the 2014 WRC. Combined, they stayed in Amsterdam for a total of 19,500 nights (and days).

Daytime spending

No data is available on the average daily spending of athletes and staff members during the WRC. As most of this group received “free” meals from the organisation, we have estimated daily spending at a conservative 25 euros. Total (additional) daytime spending by athletes and their team staff for the 2014 WRC event is estimated at 534,000 euros.

Spending related to overnight stays

Data on hotel reservations for the national teams show that they spent a total of 2,057,000 euros in and around Amsterdam on accommodations for athletes and team staff members.

Additional spending related to the 2014 WRC

In preparation for the 2014 WRC in Amsterdam, several national teams took part in the forerunner to this event, namely the 2014 International Rowing Regatta Amsterdam (IRRA), which was held on the same course on June 28 & 29.

According to the IRRA organising committee, six national teams (Australia, China, Egypt, Germany, Mexico and USA) participated in this event for preparatory reasons. Their combined 190 athletes and coaches stayed in Amsterdam for an estimated 950 nights (and days).

Using estimates for average daily spending (50 euros) and average room prices (100 euros), we were able to calculate total spending in Amsterdam by the above-mentioned six teams during the IRRA. This spending, which would not have occurred without the 2014 WRC, generated a local economic impact of 149,000 euros.

⁴ Even though the KNRB is located in Amsterdam, its spending during the 2014 WRC is regarded as additional. With the 2014 WRC in Amsterdam, most of its spending remained within the local economy instead of leaving it, as would have happened had the WRC been organised in another country.

Total spending related to the 2014 WRC by the different national teams (athletes and coaches) generated a positive impact of 2.7 million euros on Amsterdam's economy.



Organisation

The local organising committee (LOC) for the 2014 WRC had an event budget of around 4 million euros, which came from such sources as grants, sponsorship, ticket sales, etc. The budget was used to finance everything needed for the organisation and marketing of the event, i.e. transportation, venue dressing, security etc.

With the LOC's headquarters located in Amsterdam, its income and expenditures generate cash flows that enter and leave Amsterdam's local economy. In addition, in dealing with other local organisations, the LOC redistributes money within the local economy.

An analysis of all the income and expenditures, and their geographical origins (income) and destinations (expenditures), shows that the LOC generated a net positive impact of 239,000 euros on Amsterdam's economy.

FISA and the national federations

Hospitality is an important aspect of major sporting events. During the 2014 WRC, the LOC invited and hosted many international guests. These guests included members of FISA and their guests, as well as members of many national rowing federations and other VIPs. The LOC made all hotel reservations. However, in many cases, the costs of these arrangements were covered by FISA, or national federations.

During the 2014 WRC, approximately 180 international guests enjoyed a total of 1,200 nights (and days) in Amsterdam, while attending the event. This generated additional spending of 102,000 euros on accommodations, as well as an estimated 127,000 euros in daily spending .

Total spending related to the organisation of the 2014 WRC generated a positive impact of 469,000 euros on Amsterdam's economy.

⁵ For practical reasons (restricted access area), these VIPs were not included in the visitor survey. Therefore, their spending was calculated separately, using estimates for daily spending.

Media

The local organising committee for the 2014 WRC, issued around 300 accreditations to representatives of the international media. Using estimates for the duration of their stays and location of their accommodations, our calculations show that these 300 journalists spent a total of 1,700 nights (and days) in Amsterdam while covering the event.

In addition, during the WRC, the host broadcaster (NOS) had a crew of 40 to 118 men covering the event, adding up to 731 workdays. The crew members all commuted from home.

By combining the 1,700 nights and 2,250 working days with estimates for daily spending (50 euros) and room prices (100 euros), we calculated the economic impact of the total spending by media representatives.

Total spending by media representatives during the 2014 WRC generated a positive impact of 317,000 euros on Amsterdam's economy.

Total economic impact

Overall, the 2014 World Rowing Championship had a significant impact on Amsterdam's local economy. Over a period of two weeks, the event generated almost 56,000 overnight stays in the Amsterdam area.

Local spending related to these overnight stays and daily consumption by visitors, athletes and team staff and media representatives, as well as event organisation expenditures, generated a positive direct impact of 6.6 million euros on the local economy.

Athletes	€ 2,740,000
Visitors	€ 3,054,000
Organisation	€ 469,000
Media	€ 317,000
Total	€ 6,580,000

Spending related to the 2014 WRC also had an indirect effect. Specifically, when suppliers of the event re-spent part of their event-related income, they generated extra business for their own suppliers. It is fair to assume that a significant part of this indirect effect materialised in the Amsterdam area, resulting in an extra boost for the local economy.

The magnitude of this indirect effect can be estimated with a multiplier. In an economic impact study for the Amsterdam EURO 2020 bid, a national multiplier of 1.55 was used, indicating that one additional euro spent in the Netherlands generates an additional indirect effect of 0.55 euros. On a local scale, multipliers tend to be smaller as some goods or services are not available locally, causing leakage of spending to surrounding areas. Using a conservative multiplier of 1.4, the positive indirect impact of the 2014 WRC is estimated to be around € 2.6 million.

Total economic impact of 2014 WRC for the City of Amsterdam: 9.2 million euros.

⁶ PwC, *EURO 2020: Economische impactanalyse*, February 2014. The multiplier was constructed by combining multipliers of various relevant industries (hotels, restaurants, telecommunications and "other commercial services").





PART 2

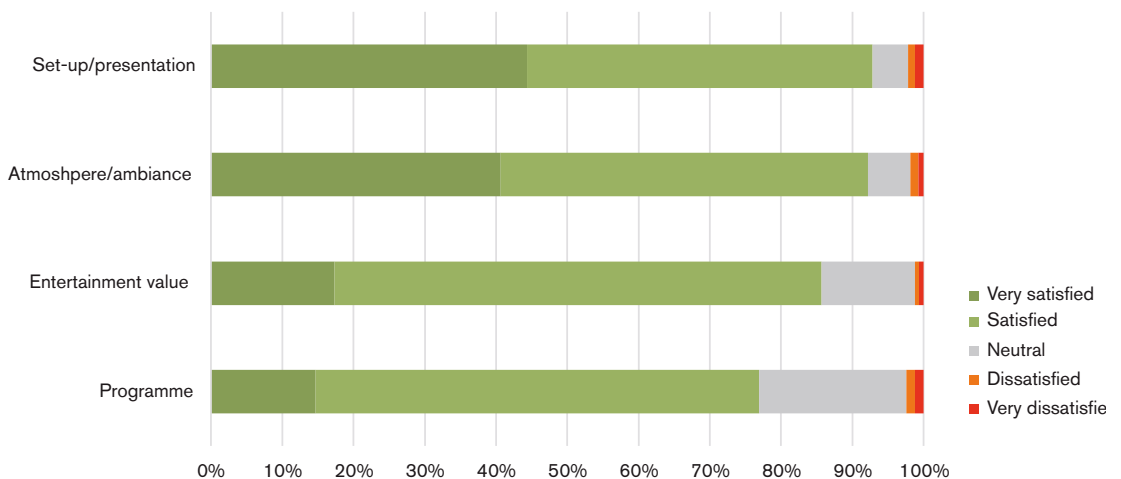
Visitor and volunteer satisfaction ratings for 2014 World Rowing Championships

Visitor satisfaction ratings

Male and female visitors at the WRC were almost equal in number. The visitors ranged in age from 18 to 83. The average age was 40. Notably, some 44 percent of the visitors were under 30. The more extensive survey (with 421 respondents) revealed that the visitors had a high affinity with rowing. Over half of the visitors surveyed (56.6 percent) indicated that they were rowers themselves, and 14 percent said they had rowed in the past. Of those who were current rowers, roughly 12 percent said they definitely wanted to row more frequently

after seeing the WRC. Another 30 percent said the event would make them consider rowing more frequently.

The average visitor satisfaction rating for the event was 8. Visitors were asked to rate different aspects of the 2014 WRC on a scale from 1 (very dissatisfied) to 5 (very satisfied). Their responses revealed that they were satisfied with all aspects. The most positive responses were concerning the set-up/presentation and the event's overall atmosphere.



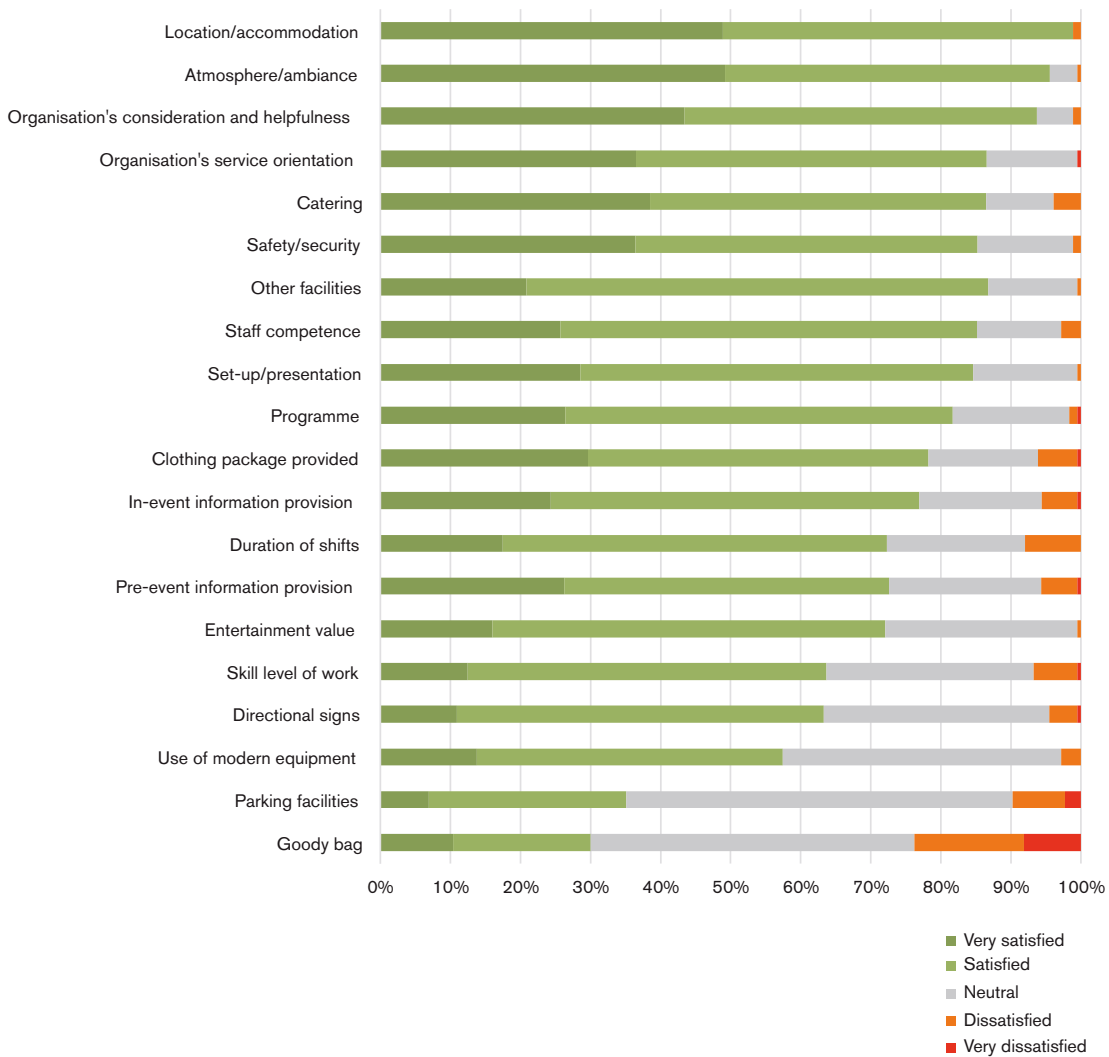
Volunteers

In total, 662 volunteers helped out in the WRC. On average, these individuals worked as volunteers for 5 of the 8 days of the event. The most commonly cited reason for volunteering among this group was that they themselves were active rowers (86 percent). Of the volunteers who helped out with the WRC, almost 70 percent had volunteered in previous sporting events. Almost 75 percent of the WRC volunteers were also active volunteers in their daily life. On average, this group spends 21.5 hours a month doing volunteer work.

The female volunteers at the WRC significantly outnumbered (63 percent) their male counterparts (37 percent). The volunteers ranged in age from 13 to 76. Their average age was 32. Remarkably, some 60 percent of the volunteers were 25, or younger. Most of the volunteers (59 percent) had completed a Bachelor's or Master's degree. Given that almost half of the respondents (48 percent) did not have paid employment, and that the majority (some 60 percent) were younger than 25, it is plausible that many students worked as volunteers at the WRC.

Some 96 percent of the volunteers were satisfied with the event. On average, the volunteers gave the event a rating of 8.3 on a scale of 1 to 10. The majority expressed the desire to volunteer again at an event like this in the future. Ninety percent said they would volunteer again for a future WRC, if given the opportunity.

The volunteers were asked to rate different aspects of the WRC on a scale from 1 (very dissatisfied) to 5 (very satisfied). The most positive responses were concerning accommodations, atmosphere and the organisation's consideration and helpfulness. This group was least positive concerning parking facilities and the goodie bags they received.



Aside from giving satisfaction ratings, the volunteers were asked to rate the importance they attach to different aspects of the event on a scale from 1 (completely unimportant) to 5 (very important). The average score was 3.96 for satisfaction, and 4.04 for importance. A matrix⁷ was generated based on comparisons of the values for satisfaction and importance, which consisted of four quadrants: maintain, improve, monitor and maintain as a low priority.

The aspects that were considered most important were atmosphere, the organisation's service orientation and its helpfulness. These aspects also received fairly high satisfaction scores. Aspects with fairly low satisfaction scores that proved, relatively speaking, to be very important to volunteers, have been identified as areas requiring improvement. These aspects include pre-event information provision, in-event information provision and directional signs.

<p>Quadrant 2 (improve): Low satisfaction/high importance:</p> <ul style="list-style-type: none"> 12 In-event information provision 13 Pre-event information provision 16 Directional signs 	<p>Quadrant 1 (maintain): High satisfaction/high importance:</p> <ul style="list-style-type: none"> 1 Location/accommodations 2 Atmosphere/ambiance 3 Organisation's consideration and helpfulness 4 Organisation's service orientation 5 Catering 6 Safety/security 8 Staff competence 9 Other facilities 10 Programme
<p>Quadrant 3 (maintain, low priority): Low satisfaction/low importance:</p> <ul style="list-style-type: none"> 14 Entertainment value 15 Duration of shifts 17 Skill level of work 18 The use of modern, innovative equipment 19 Parking facilities 20 Goodie bags 	<p>Quadrant 4 (maintain, low priority): High satisfaction/low importance:</p> <ul style="list-style-type: none"> 7 Set-up/presentation 11 Clothing package provided

⁷ This method adheres – both in content and structure – to the guidelines established by the WESP (Working Group on Evaluation of Sporting events), a Dutch platform that oversees the quality of research on sporting events. The AUAS and Sport2B are both members of the WESP.



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2000

MEETS



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