



All in Sport Consulting
**Adapted Sport:
Economic Impact Survey**

Findings Report

October 20, 2022





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Adapted Sport: Economic Impact Study

GOAL

Create an understanding of this economic data within the adapted sport movement:

- *To collectively, as a movement, build an economic business case of the industry that moves beyond subjective narratives.*
- *To give individual organizations and leadership a resource as they share this perspective on the movement's economic power.*



Adapted Sport: Economic Impact Study

CONTEXT & METHOD

All in Sport Consulting, in partnership with Stitch Marketing Research and Huddle Up Group, conducted a benchmark study of expenditures and budgets of adapted sport organizations across the U.S. This same study was first done in 2020.

- + Surveys were emailed to **243 contacts representing 192 organizations**.
- + Fieldwork was conducted between August 24 – October 10, 2022.
- + **34 organizations'** economic profiles are represented in the following report, including **partial and complete survey responses**. (24 completes, 10 partials)
- + This year, we also conducted one-on-one interviews with industry leaders.



CHALLENGES

This year, we ran into challenges collecting the survey data.

Because of this, we've included a review of our goals in conducting the study and shared more about the reasons we believe that creating understanding around the economic impact of adapted sports events is important to our industry.





How do we interpret this data?

The benchmark study is an ongoing project that provides a benchmark of the economic impact of the adapted sport movement in the U.S. The first study was done in 2020, reflecting activity from 2019.

- + While the data collected is not comprehensive of all organizations, it **sheds light on directional trends of the adapted sport industry and is a sampling.**
- + This data is **representative of the participating organizations and is not an exact projection of the total market.**
- + **Partial survey responses have been included in this report to maximize insights.** Data findings are annotated with respective respondent sample sizes. You'll note sample size denoted as (n = xx) throughout the presentation.



Economic Impact

Educating ourselves & others



Creating a financially-focused resource

By understanding our industry's economic impact, specifically events, we can accomplish more for our athletes and the overall movement.

Educate ourselves

“The more a numbers case can be made, the better. It makes the conversation with communities much easier because it's what *they* (destinations) look at first. Economic impact is a major driver for them.”

-Jason Gewirtz, Executive Editor/Publisher, SportsTravel (paraphrased quote)

Key Insight: *If numbers are important to host cities, our organizations need to understand them, too.*

Educate cities, sponsors, & boards

Regarding host cities & destinations:

“There is a lack of understanding and knowledge about what's needed to organize events like these. Training and education are where you start, and it takes time to do that.”

-Amy Rauworth, Chief of Development and Strategic Partnerships, Lakeshore Foundation (paraphrased quote)

Key Insight: *Our sports organizations must take the lead on educating the destinations we are asking to host events.*

Create a better infrastructure for athletes

“The biggest benefit adapted sport events provide are that they help create an infrastructure for future events: it's not just the events themselves, but what continues to happen after the event has taken place.”

-Stephane Leblais, Director of Partnerships, The Valuable 500 (paraphrased quote)

Key Insight: *Creating and growing disability awareness benefits the entire community. Community-wide impacts last much longer than the events themselves ie, social change and sport*



Educate ourselves

First, we need to educate ourselves on the economic impact of our events with host communities, large and small.

Lead Conversations

“Sports organizations are the lynchpin to making this all happen. Nothing would happen without them.”

*-Jason Gewirtz, Executive
Editor/Publisher, SportsTravel
(paraphrased quote)*

Elevate Conversations

“We have to be able to elevate the conversation within our organizations in order to broaden discussions with host locations.”

*-Dawna Callahan, CEO, All in Sport
(paraphrased quote)*



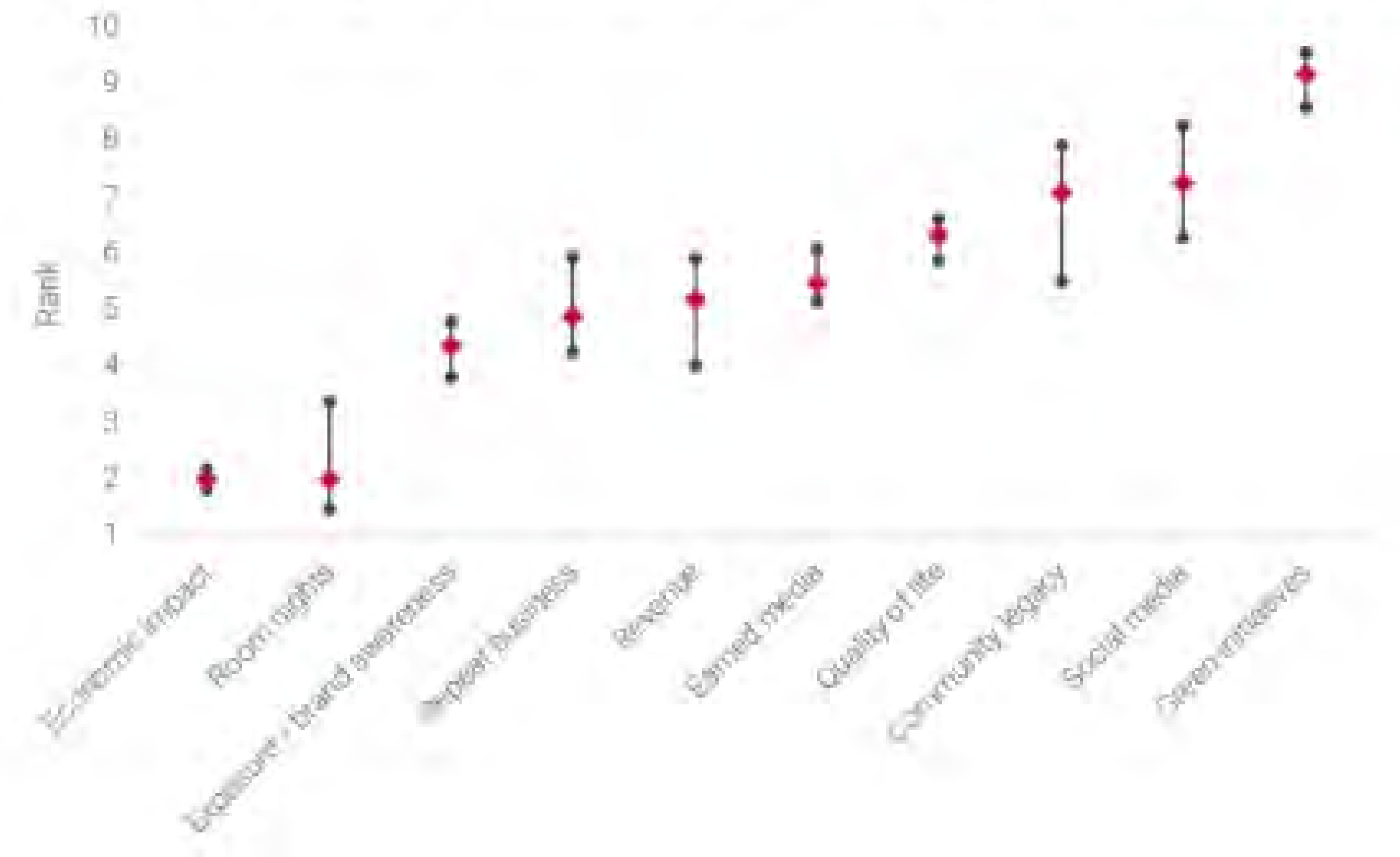
What's important to host destinations: **Economic Impact**

In Sports ETA's 2021 survey, they asked 176 destination members to rank 10 success factors:

- Destinations ranked **Economic impact** and **Room nights** as the two most important factors for success in 2021.
- Ranked in the middle were Exposure/brand awareness, Repeat business, Revenue, and Earned media.
- Quality of life, Community legacy, Social media, and Green initiatives were ranked as less important factors for success.

Factors for success – 2021

(rank with 1 being the most important and 10 being the least important)



Educate cities, sponsors, boards and sport leaders

When we understand the economic impact, it's valuable information that can be used to educate others about what our events bring to communities – beyond subjective narratives.

“Adapted Sports organizations have the power to showcase their events and their athletes if they can help cities understand that these are events that they are capable of hosting.”

*-Jason Gewirtz, Executive
Editor/Publisher, SportsTravel
(paraphrased quote)*

One of the stated goals of Sports ETA's State of the Industry report is to “provide an essential tool for **advocacy** of that work to all categories of industry stakeholders.”

*-Quoted from the Sports Events &
Tourism Association State of the
Industry Report 2021*



Create a better infrastructure for athletes

In turn, this resource will help us build a better infrastructure for our athletes.

“Sports translates to opportunities beyond the playing field. It provides opportunities for people with disabilities to remove intrinsic barriers, it fosters leadership skills, and it translates to other areas of life in general.”

“Physical activity provides opportunities for growth and development and expands what you believe you can achieve in life: to interact with other people through sport is important.”

“These events empower people, they come see rugby players plowing into each other - it does change their perspective!”

-Amy Rauworth, Chief of Development and Strategic Partnerships, Lakeshore Foundation (paraphrased quotes)

“The biggest benefit the sporting events provide are that they help create an infrastructure for future events: it's not just the events themselves, but what continues to happen after the event has taken place.

Everyone thought it was silly that the US was hosting the 1994 FIFA Cup, but that event changed the course of soccer in the US.”

-Stephane Leblois, Director of Partnerships, The Valuable 500 (paraphrased quote)



The movement has momentum

Organizations like these are leading the movement nationally and internationally. We have an opportunity to use their momentum.



“To provide opportunity for individuals with disability to live a healthy lifestyle through physical activity, research, advocacy and health promotion.”



“500 CEOs and their companies have joined by making a commitment to action for disability inclusion. They are now beginning to work together as a collective, to drive system change.”

“The Paralympic Movement has adopted and follows athlete-focused values, which act as the underlying reference for all those involved in Para sport.”



“The Paralympic Movement is growing in this country, and we can use sport as a vehicle to change a lot of perceptions and lives.”

-LA Creator Paralympian
Scout Bassett*



Respondent Profile

Organization type

Organizational role



Role in the Organization

Respondent roles varied more in 2022, relying more heavily on Program Managers and Program Directors.

“Something else” roles include, for example:

- Development Manager*
- Program Coordinator*
- Marketing*
- Rec Supervisor*
- Track Coach*

18% Portion of board members who identify as having a disability.

***Which best fits your role in your organization?
You can mark more than one.***

Respondent Role	2022	2020
Executive Director	23%	40%
Program Manager	17%	7%
Program Director	13%	18%
Executive/Leadership Team	11%	12%
Board Member	9%	9%
Founder	9%	21%
Development/Fundraising	8%	5%
Something else	9%	21%

[n=36, 2022]

[n=55, 2020]



Number of Employees

Approximately how many full-time, part-time and/or contract employees did your company have in 2021?

Approximately how many of your staff identify as having a disability?

Responding organizations this year note that a majority of their employees are Full-time employees.

An average of 21% of all staff identify as having a disability.

Number of Employees	%	% who identify as having a disability
Full-time	72%	22%
Part-time	24%	17%
Contractors	4%	24%

[n=34]



Organization Types

Majority of organizations are nonprofits, some partnering with other categories.

Participation doubled from 2020's survey.

***Which of the below describes your organization?
You can mark more than one.***

Organization Type	2022	2020
Nonprofit	64%	82%
Municipal/County Parks & Recreation	10%	9%
NGB	10%	5%
Program within a university	5%	5%
Program within a healthcare system/rehab hospital	5%	2%
Other (please specify)	7%	7%

[n=42, 2022]

[n=55, 2020]



Organization Financial Profile

Revenue estimates

Projections



Adapted Sport Organization Revenue 2022

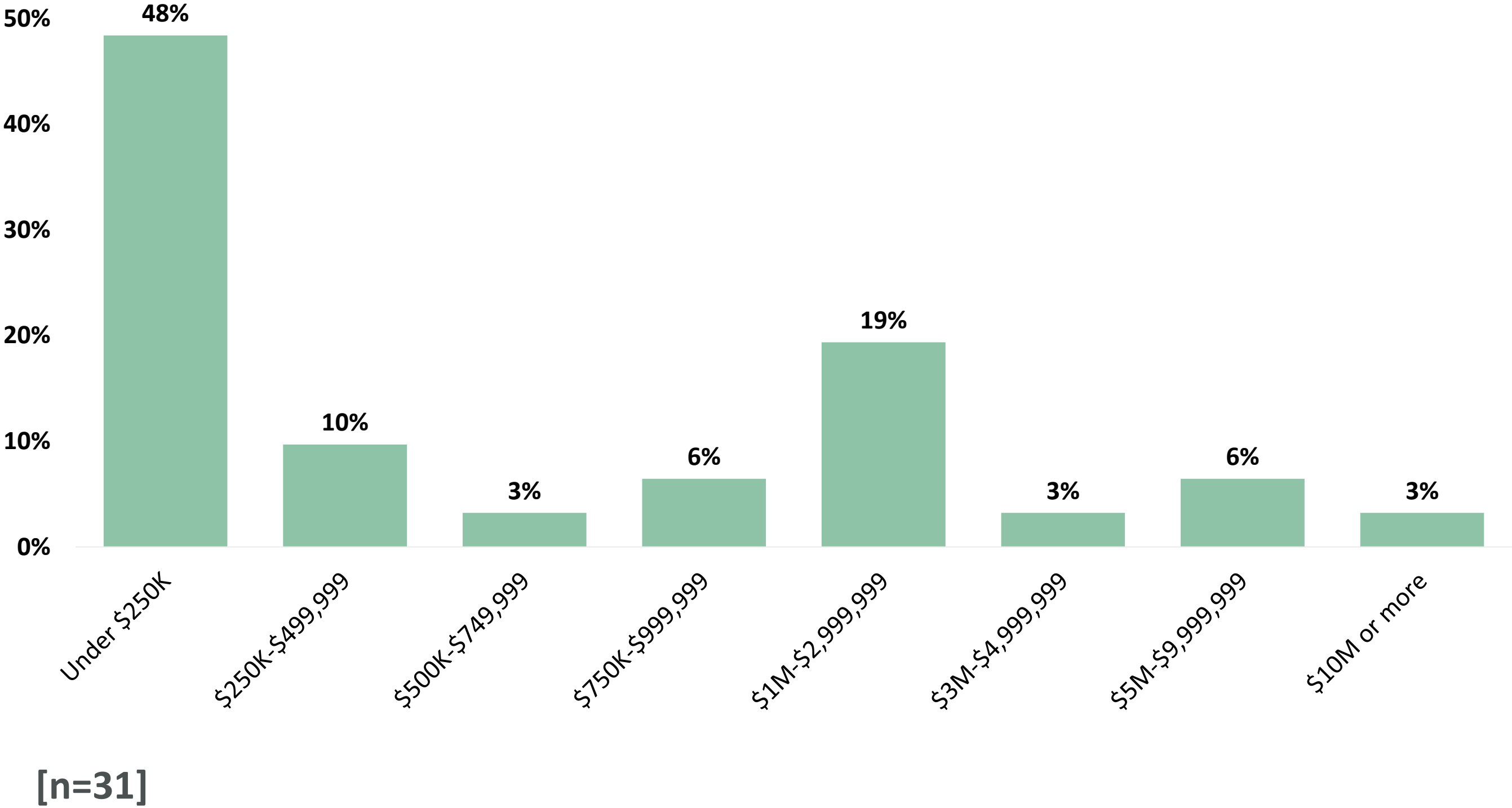
Which of the following categories includes your organization's revenue for calendar year 2021 (or fiscal equivalent)?

Nearly 50% of organizations in this survey operate at under \$250K in annual revenue.

Two-thirds (67%) operate at less than \$1M in annual revenue.

One-third (31%) operate at more than \$1M in annual revenue.

The intention in reporting these figures is that they may lead to additional sponsor support by shifting the narrative and providing objective financial impact with partners.



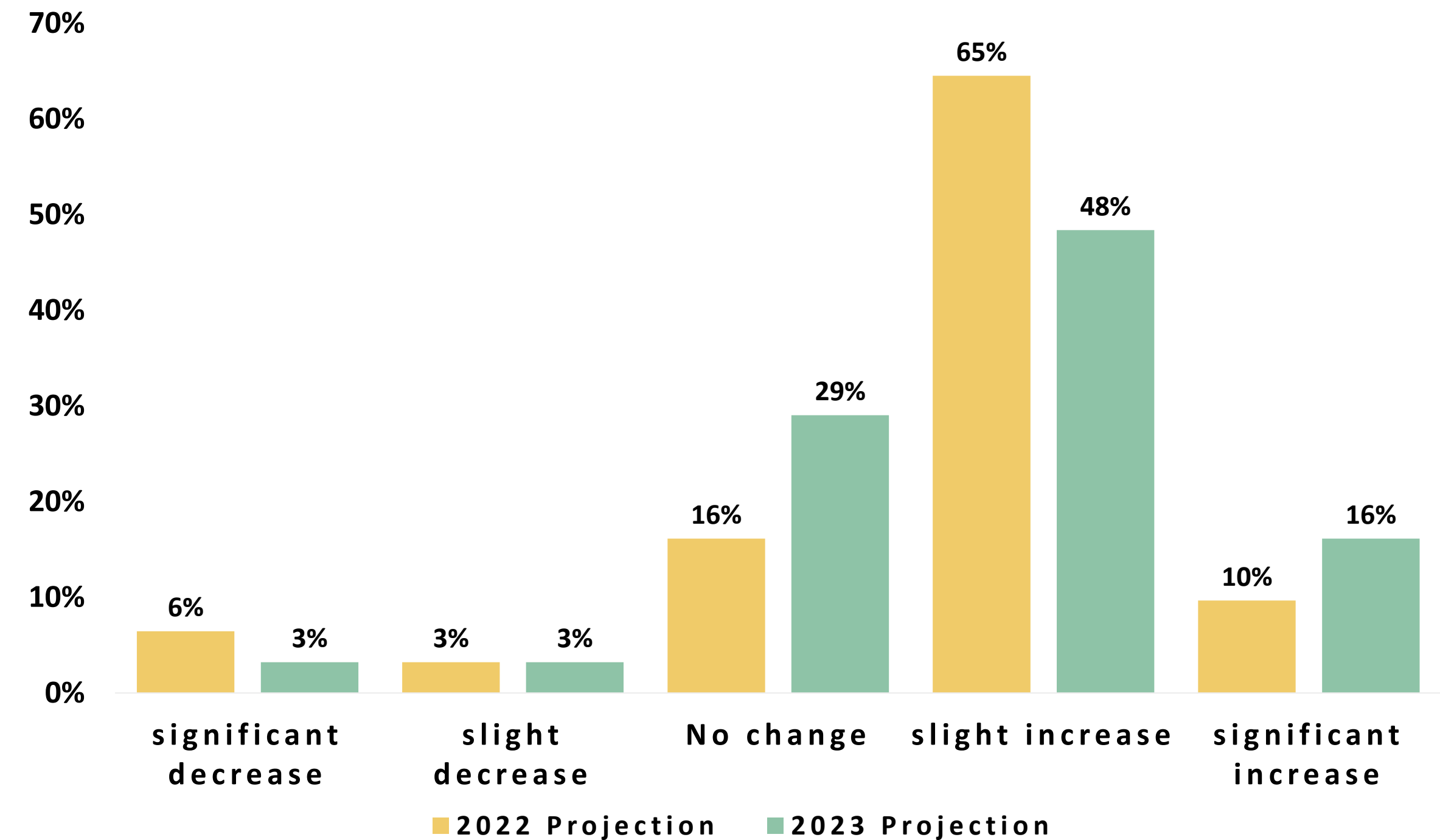
Revenue Projections in 2022 and 2023

In 2022/Looking ahead to 2023, what do you anticipate will be the change in revenue results versus 2021/2022 (total contributions, program revenue, etc.)...?

With fieldwork conducted more than halfway through 2022, leadership anticipates the year's revenue to be increased over 2021.

Forecasts for 2023 are also optimistic, with respondents predicting slight to significant increases in revenue in the upcoming year.

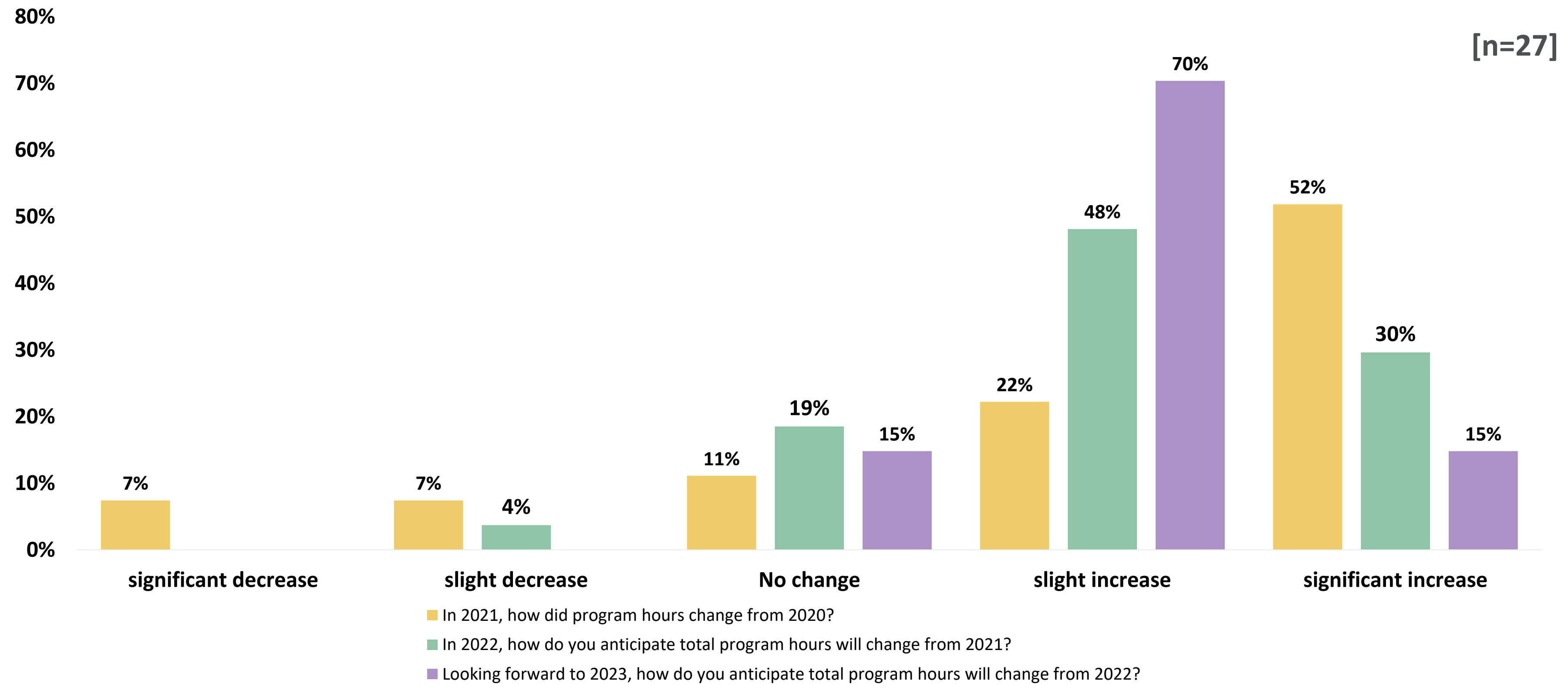
Organizations appear to be recovering from COVID shutdowns.



[n=31]



Program Hour Projections 2022 and 2023



Similar to revenue trends, leadership predicts increased hours for the 2022 year, and forecasts mostly slight increases in 2023.



Event Profile

Event profile – number, length, type

Participants, spectators, athletes

Staff, volunteers

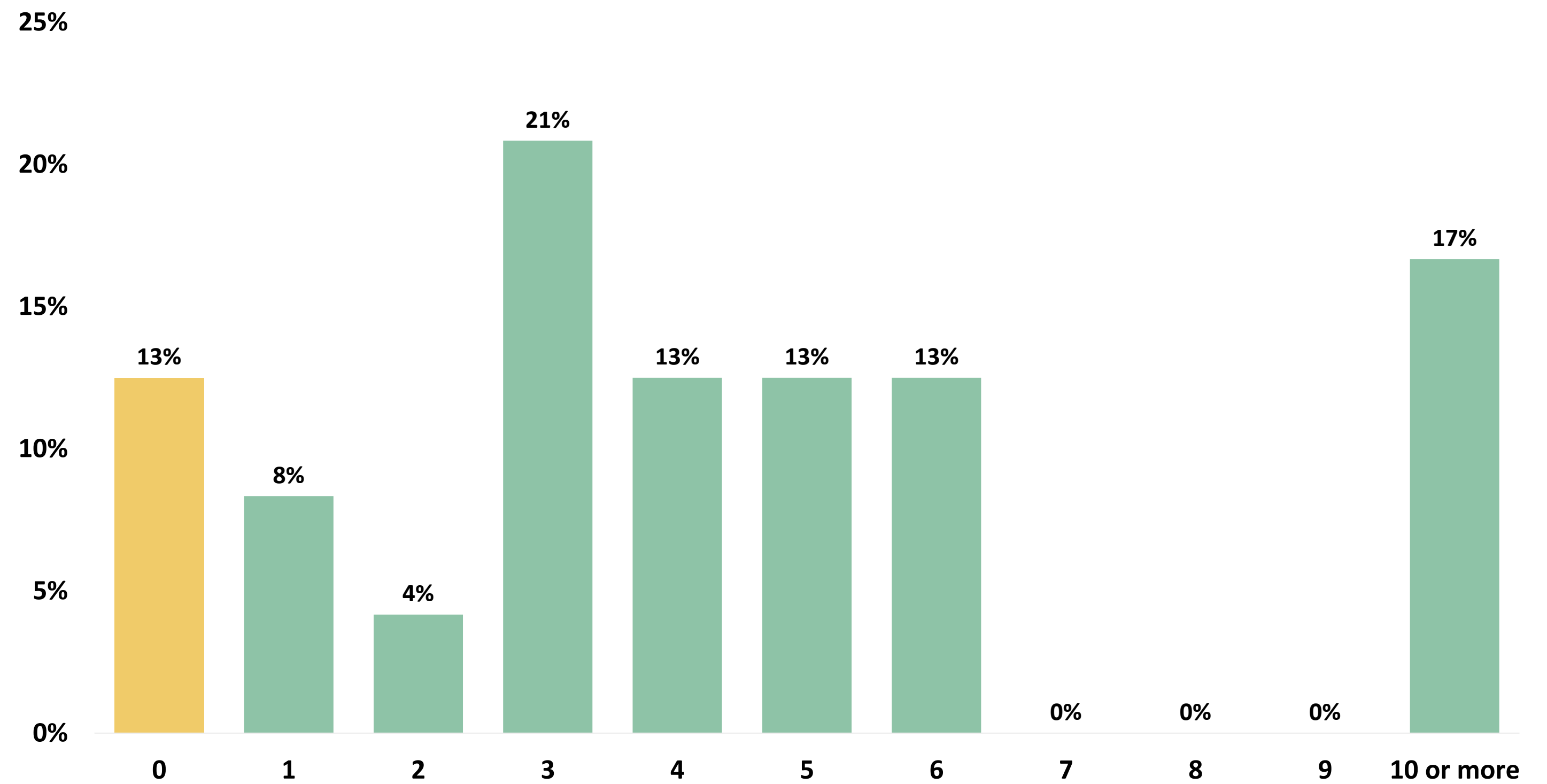


Number of Events

Total Estimated Events: 104

Organizations that hold either one event or 10 or more represent half of all represented respondents – again, showing the polarity of the industry.

Survey respondents were capped at reporting on 10 events, so this calculation is conservative.



Total estimated events calculated with organizations reported average number of events.

[n=24]

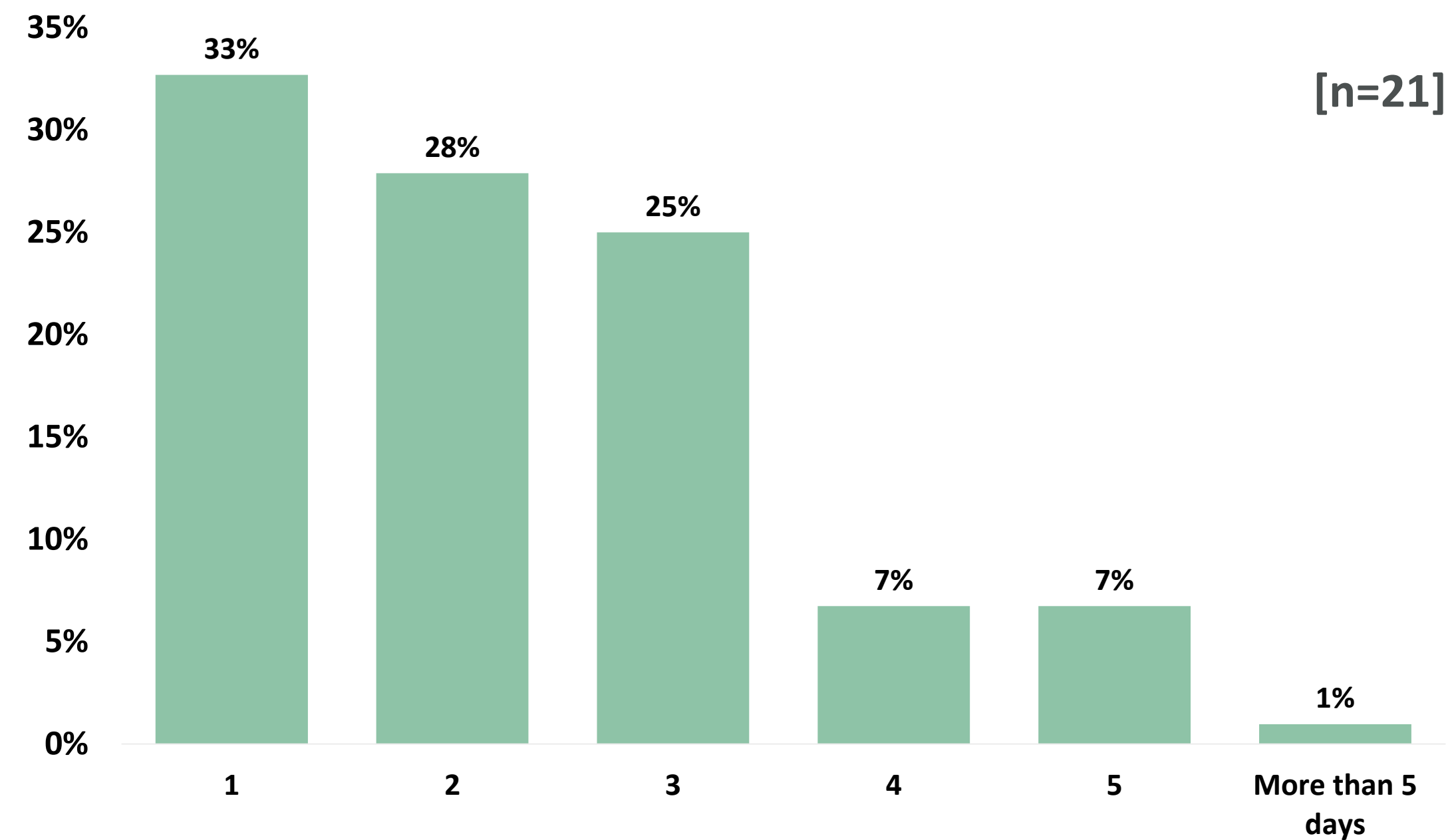


Events – Length

Total Estimated Days of Events: 239

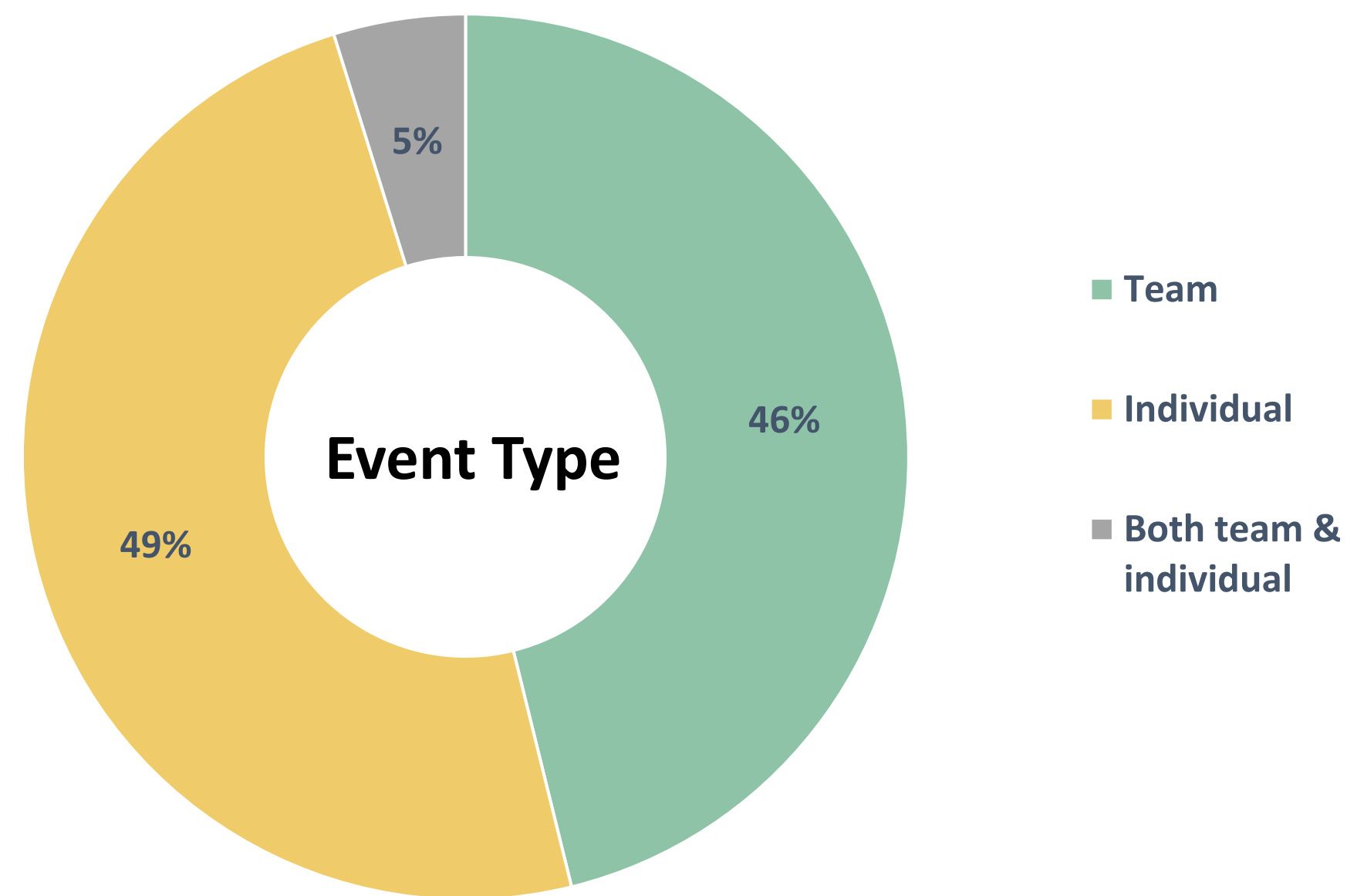
The overwhelming majority of events, 86%, lasted 3 days or fewer.

Total estimated days are calculated using organization events and length of time. This is a conservative number, as respondents were capped at reporting “more than 5 days”.



Events – Participants

Total Estimated Event Participants: 32,133 participants



Event Participants	
Athletes, Coaches	11,130
Event administrators (e.g., referees/officials, event workers, volunteers)	4,616
Spectators	16,387
Total Participants	32,133

Total participants are calculated based on organization responses. Estimates based on athletes per team are included, with additional participants as listed above from 21 organizations.



Para Events Economic Impact



Para Events Economic Impact – 2022

Para Events Economic Impact: \$6,782,592*

*** Only 12% of the Adapted Sport community completed the survey and the total Economic Impact of their events (n=104 total events) is noted above.**

Economic Impact is calculated using 2021 EI survey data from Sports & Events Tourism Association or SportsETA.

The above estimate is a conservative representation of economic impact within the industry - organizations that completed this survey were able to report on a maximum of 10 events, with a cap of “5 or more” days per event.

Note: Total EI based on a summary of one day events and multi-day events, with calculations taking into account events that would not include hotel room stay and those that would include higher spend on room nights and travel.



Para Events Total Economic Impact – 2022

Para Events Total Economic Impact: \$77,751,674

Calculations and total economic impact estimates were made for the adapted sport community based on the completed surveys.

The figure above is a conservative estimate, yet still sheds light on the economic power of the national adapted sport industry.

It's critical to continue this important work to build understanding that adapted sport is more than subjective narratives. Educating and increasing awareness around the economic strength of the movement is key.



Key Learnings





Market Landscape Report

Key Learnings



We have to take the lead in educating ourselves on the topics that are important to host destinations and our industry's role in Economic Impact.




With this information we can better educate host destinations about what our events bring to the table, shifting the conversation to focus on the movement's economic impact.



The overall goal being to create a better infrastructure for our athletes in the long run and increase disability awareness through sport.





Q & A



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