Northstar MEETINGS GROUP

IN COOPERATION WITH

aists

EVENT HOST VENUE STRATEGY OF SPORTS EVENTS RIGHTS HOLDERS

CONTENTS

GLOSSARY

Term / Acronym	Definition
AISTS	Académie Internationale des Sciences et Techniques du Sport
IF	International Federation
RH	Rights Holder
MICE	Meetings, incentives, conferences, and exhibitions
Sport ETA	Sport Events and Tourism Association
IAEH	International Association of Event Hosts
VIK	Value in kind
LOC	Local Organising Committee
EMS	Event-Managment System
VIP	Very Important Person
FOP	Field of Play
ESG	Envrionmental, Social, Governance KPIs
KPI	Key Performance Indicator
NGB	National Governing Body
BWF	Badminton World Federation
CGF	Commonwealth Games Federation
FIBA	Fédération Internationale de Basketball
FIFA	Fédération Association Internationale de Football
FIH	Fédération Internationale de Hockey
FIS	Fédération Internationale de Ski
FIVB	Fédération Internationale de Volleyball
ISF	International School Sport Federation
ISSF	International Shooting Sport Federation
ITTF	International Table Tennis Federation
TWG	The World Games
WDSF	World DanceSport Federation

ABSTRACT

Northstar Meetings Group is the premier source for sports event organisers, meeting and convention planners and incentive program professionals across all sectors globally. Through its sports division brands, namely **SportsTravel** magazine and live events such as the **TEAMS Conference & Expo**, **TEAMS Europe** and the **EsportsTravel Summit**, the company connects international federations and other sports and esports event organisers with host cities and venues, as well as myriad sport-travel related industry suppliers facilitating and supporting live sporting events.

The project focuses on the investigation and analysis of the host city/region selection process for international events. The objective of the project is to gain a deeper understanding of the key criteria that Rights Holders (RH) look for when deciding where their events will be hosted, the direction they are currently going in, and obtain key insights on the bidding process. The project also aims to provide insights on what the host cities look for and their motivation to seek hosting international sport events.

The team approached the project by conducting comprehensive research and the compilation of both qualitative and quantitative data from a diverse array of stakeholders including International Federations (IF) and host cities. The results and analysis of the project will serve **Northstar Meetings groups** to match the demand of IFs and deliverables to cities, hotel chains and travel industry partners, to ensure maximum ROI for all parties whilst supporting the development of sport internationally.

ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

PROJECT MISSION

This Project was commissioned by **Northstar Meetings Group** in collaboration with the International Academy of Sport Science and Technology (**AISTS**) to investigate how Rights Holders, for international sports events, select host cities and to understand what Host Cities' priorities are when bidding for international sports events. The main objective was to identify priority criteria, trends, financial aspects, and geographical preferences when it comes to selecting host cities for sports events, to provide practical recommendations to create alignment between Rights Holders and cities to promote mutual benefits, maximise potential return on investment, and sustainable development for sports events around the world.

METHODOLOGY

The research project used a robust mixed-method approach, including comprehensive surveys, focused interviews, and robust secondary research. Surveys were given separately to international sports Rights Holders and global Host Cities, respectively, to yield as broad a representation as possible. Interviews were conducted as a follow-up to surveys, which helped provide more details for the key criteria for selection and expectations. Quantitative, qualitative, and thematic analysis were used, and validated through triangulation with industry standards, bid documents and academic resources.

RESULTS

Rights Holders overwhelmingly focus on objective and operational considerations when selecting who will host the event, with emphasis on quality of sports infrastructure, venue capacity, security measures, broadcast capabilities, and proven experience as a host.

Sustainability commitments, quality of medical facilities, and accessibility are also considered, but more as supplementary and secondary components of their decision-making process. Interestingly, Rights Holders perceived financial incentives, or a potential for ticket sales, or reliable personal relationships with hosts as far less important, which indicates a shift in thinking towards a desire for professional contracts, long-term operational excellence, and a trend towards managing risk.

The bidding process usually includes an open tender format with quick decisions made within six months, and limited involvement of consultants. Rights holders reported challenges in meeting infrastructure requirements, securing financial guarantees, and achieving strategic and cultural alignment with cities. Although Europe remains dominant in the marketplace, there is a clear strategic push towards diversifying into North America, the Middle East, South America, and other emerging markets based upon merit rather than regional preferences.

Host Cities showed ambitious growth aspirations, meaning they invested aggressively in establishing new sporting venues while acknowledging a large gap compared with their required venues, particularly specialised ones like athletics tracks and aquatics centres. As cities become more competitive in attracting events, most Host Cities argue that per capita financial incentives for events are being offered to event owners. The hospitality infrastructure is generally sufficient in terms of hotels and international air access, although not without some challenges with ground transportation and gaps in capacity when events peak. Cities consistently prioritise economic benefits, hotel occupancy rates, and destination marketing, with community health and wellness impacts viewed as secondary benefits.

For strategic improvements, Host Cities rely on dedicated sport event teams and foster strong partnerships in the sport event industry by attending and meeting at conferences and networking events. The majority of perceived success was defined by economic measurements, such as hotel room-night generation or visibility to the destination.

EXECUTIVE SUMMARY – CONTINUED

CONCLUSION

This research has identified an important opportunity for improved alignment between Rights Holders and Host Cities. Rights Holders must be transparent about their mandatory criteria and preferred operational standards, focusing on issues related to infrastructure quality, risk management, and longer-term strategic benefit to the event and long-term profitability, as opposed to focusing on immediate revenue-generating opportunities. By employing more flexible financial models that put more emphasis on a co-creation process between both parties to achieve common goals (e.g., increasing tourist activity in the Host City, increasing the global visibility of the Host City brand, creating a positive event legacy) Rights Holders would be better positioned to address broader geographic diversification of events, and create alternative partnerships with Host Cities.

On the other side, Host Cities should strategically prioritise infrastructure gaps to demonstrate their operational readiness, and when crafting their bids, clearly show operational readiness and support capacity, including a breakdown of operational risk mitigation. Focusing on material economic impacts - specifically meaningful legacy provisions - to further differentiate themselves in an increasingly competitive marketplace will improve the Host City's chances of being selected as the Rights Holder's city of choice.

Both Rights Holders and Host Cities should foster deeper partnership-oriented relationships and use opportunities for regular engagement to allow for increased transparency, shared expectations and mutual understanding. Ultimately, the strategic recalibration will help to generate more resilient and sustainable event-hosting ecosystems for all stakeholders, supporting ongoing global growth and development of sport.

1. INTRODUCTION

1.1 BACKGROUND

Northstar Meetings Group is the premier source for sports event organisers, meeting and convention planners and incentive program professionals across all sectors globally in the meetings, incentives, conferences, and exhibitions (MICE) industry. Serving nearly 500,000 active sports event organisers, meeting and event planners, and incentive professionals, **Northstar** facilitates professional development and the achievement of business goals.

Through its sports division brands, namely **SportsTravel magazine** and live events such as the **TEAMS Conference & Expo**, **TEAMS Europe** and the **EsportsTravel Summit**, the company connects international federations and other sports and esports event organisers with host cities and venues, as well as myriad sport-travel related industry suppliers facilitating and supporting live sporting events.

The **TEAMS Conference & Expo**, launched in 1998, is recognized as the world's largest gathering of sports-event organisers. It brings together CEOs, executive directors, and event managers from sports organisations with representatives from sports commissions, corporate sponsors, and event suppliers.

The **EsportsTravel Summit**, established in 2017, is the only event focused on the travel side of the esports industry. It provides an opportunity for esports tournament and video-game event organisers to engage with destinations, hospitality industry representatives, and event suppliers. The summit addresses the growing intersection between esports and the travel industry.

The needs of Rights Holders vary based on the sport demographic and member size, which impacts the choice of city required to host their events. These variables are important when strategically connecting a potential host city to a RH.

1.2 PROJECT MISSION

Northstar Meetings Group wants to study the requirements, preferences, and needs of IFs to match their demand and deliverables to cities, hotel chains and travel industry partners positioned to support sports-related travel, trying to ensure maximum ROI for all parties whilst supporting the development of sport internationally.

Northstar appointed the **AISTS** team to obtain comprehensive insights into the decision-making processes of Rights Holders, through a series of online surveys, targeted interviews, and data analysis. The project aims to gain a deeper understanding of the key criteria that RHs [Right Holders] look for when deciding where their events will be hosted, the direction they are currently going in, and obtain key insights on the bidding process. The project also aims to provide insights on what the host cities look for and their motivation to seek hosting international sport events.

1. INTRODUCTION – CONTINUED

1.3 PROJECT OBJECTIVE

The project is focused on supporting stakeholders to align their strategies and increase ROI while growing and developing sports around the world, by identifying crucial selection criteria, regional preferences, and opportunities for the future. The project also aims to support sustainable relationships that are mutually beneficial between these organisations and the host destinations.

The project will be achieved by meeting the following objectives:

- Identify how RHs select host cities and venues for events and sports related meetings and the variances in regions.
- Identify and rank all the variables in RHs decision-making processes including logistical, economic, and demographic aspects.
- Understand the dynamics of the relationships RHs have with host cities and venues,
- best practices, and potential areas for improvement.
- Identify fees, size of events, economic impact for RHs and host destinations, and ROI metrics.
- Identify trends related to the growth of sport, transition to esports, online vs physical events, broadcast requirements, etc.
- Provide recommendations on how Rights Holders can react and adapt to opportunities and challenges as prepare for the future.

1.4 PROJECT SCOPE

Northstar is looking to gather information on how IFs and other sport organisations make their site-selection and sports-travel related decisions. It is inside the scope of the project:

- To contact international RHs and cities around the world to collect information via online surveys.
- To conduct interviews with key representatives in event management at international federations and other sports organisations.
- To perform analysis of selection criteria and decision-making processes.
- To explore trends and ROI factors in sports event hosting.
- To make recommendations based on evidence obtained throughout the course of the project.

It is outside the scope of the project:

- To collect data from non-sports-related events or industries not aligned with IF objectives and to develop an app.

2. METHODOLOGY

The project consisted mainly of four stages:

1. survey elaboration
2. data collection from survey responses
3. follow-up interviews
4. data analysis and identification of key insights.

This approach was agreed upon with the client to reach the widest possible audience. We invited RHs and cities to participate in the survey based on client preference and level of connection with the team, **AISTS** and **NorthStar**. Between the team, we delegated RHs and cities randomly and equally to ensure a fair distribution of work.

The reason behind doing a survey is the facility to distribute to a wider range of RHs and cities, with the benefit of it being something that can be replicated in the future if the reach of the project is to be extended or if there is the need to update data. Given **Northstar**'s strong relationships in North America, the project aims to get insights from RHs mainly centred in Europe, but with global events, this, with the sole intent to add new knowledge to the already extent knowledge base of the client. Cities from around the world were invited to participate as RHs hold events across the globe and identifying trends, pain points, and motivations is a key part of the project.

2.1 SURVEY ELABORATION

In preparation for the survey the **AISTS** team worked on identifying key criteria in event hosting and developed a proposal to include questions that could bring relevant information to gain valuable insights for the client. The survey was further reviewed and approved by the client to ensure alignment in the direction of the survey.

Our team decided to divide the survey in the following key sections:

1. general information
2. selection criteria
3. bidding
4. hosting costs and financial implications
5. geographies
6. delegates, visitors and event scale
7. popularity and media coverage
8. safety, security and medical stakeholders
9. human rights, ethics and sustainability
10. ticketing and hospitality
11. final comments.

The survey was composed of 45 questions and was intended to take 20-30 minutes to fulfil. The city survey was divided into the following sections:

1. general information
2. hosting and infrastructure
3. hospitality
4. staffing and strategy
5. reasons to host
6. industry relationships and financial incentives.

The city survey included 38 questions and was intended to take 20-25 minutes to fulfil. Since the time to complete was considerable, the strategy was to offer a summary of the key findings to participants in both surveys as an incentive.

Both surveys included a mix of multiple choice and open-ended questions. Multiple choice questions included yes or no questions ("Do you use external consultants to evaluate bids?"), questions where only one option could be selected ("How do you normally select host destinations?"), questions where multiple options could be selected ("Which geographies are you currently hosting your events in?") and questions with ranges ("How important are the following factors when selecting a host destination?"). While open-ended questions included short answers and long answers questions.

The host city survey, in contrast with the RHs survey, was designed by the client. The **AISTS** team's main functions in the creation of this survey were digitalizing it and distributing it to the host cities.

2. METHODOLOGY – CONTINUED

2.2 TARGET AUDIENCE

The audience for the RHs survey was people in positions related to event bidding or positions who had access to decision-making regarding events in international federations and other right holder organisations. Respondents included:

- Multi-sport events right holders: Commonwealth Sport, FIS - International Ski and Snowboard Federation, International Esports Federation, International School Sport Federation, IWGA, World Aquatics, World Athletics.
- Single-sport events right holders: BWF, Federation for International Foot Golf, Fédération internationale de Football Corsportif (FIFCO), FIA, FIBA 3x3, FIFA, FIH, International SAMBO Federation (FIAS), ISSF, ITTF, Volleyball World, World Breaking Classic, World Archery, World Triathlon.
- The audience for the Host City survey included cities both inside the U.S, where the client has strong relationships, and outside the U.S, including:
- U.S: Dallas, Denver, Detroit, Las Vegas, Maryland, Myrtle Beach, Phoenix, and Salt Lake City.
- Europe: Berlin, Liverpool, Isle of Man, Norway, and Trondheim.
- Asia: Singapore.

2.3 SURVEY REACH

Once the survey was finalized, we agreed on Google Forms as the platform that was to be used. To distribute the surveys to RHs and cities the team used the **AISTS** emails to show professionalism and to increase likelihood of getting answers, showing the research as an academic project.

The first approach was an email introducing the project, the team, and its objectives. It also emphasized confidentiality to build trust with respondents and offered an executive summary of the results as an incentive to increase the response rate. For the first reminder the team aimed at a short and concise follow-up email to remind RHs and cities of our project and increase the response rate. Finally, there was a second reminder, where the team tried to personalize the email instead of sending a generic reminder, aiming at mimicking the vibe of the organisation, with the sole purpose of getting more responses.

To keep track of the responses the **AISTS** team developed a document to record every person that the team had contact with, track the amount of time since the last contact , and add notes on the interactions with this person. This tool helped the team organise the follow-ups as well as keep track of the number of respondents, which was useful both for the team and for the client.

2.4 INTERVIEWS

In addition to the surveys, the team conducted interviews with RHs when their responses prompted follow-up questions. The team conducted interviews with the following individuals:

- Gian Keller – Men's Tournaments Manager at FIFA
- Mark Hurst – Head of Bidding at World Athletics
- Timotej Dudas – Event Project Manager FIS

The interviews were done via Microsoft Teams and with either one or two members of the team joining the interview. The objective of the interviews was to get deeper insights on the host selection process; the criteria used for selection and the requirements each RH has for the hosts of their international events. In the interviews the team reviewed the answers provided by the RH before and discussed further, when necessary, to increase the quality of the insights obtained in the research. The interview was done mostly with open ended questions, giving the RHs the opportunity to expand on their answers and provide valuable information for the project. Interviews were based on the answers from the RHs Survey and followed the structure from the survey, digging deeper on the answers and leaving space for follow-up questions to keep the natural flow of a conversation.

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2.5 DATA AND RESULTS ANALYSIS

After closing the survey, the team divided the analysis in the sections mentioned in section 2.1 of this report to conduct both qualitative and quantitative assessments. The data analysis combined survey responses from RHs and cities with desk research, including federation handbooks, public bidding guidelines, and relevant academic studies. Quantitative data was processed using Excel for descriptive statistics, while qualitative data was manually coded into themes to identify trends.

To strengthen the validity of the findings, the team triangulated survey results with secondary data. As part of the data cleaning process, ambiguities or missing values were resolved either through follow-up with respondents or excluded from specific analyses. While the survey captured a wide range of responses, some RHs provided partial data or chose not to disclose some information. Because of this, insights were cautiously interpreted to avoid generalizations.

2.6 LITERATURE REVIEW

As hosting international sports events becomes more formalized, almost all international Governing bodies have created formal guidelines that document the venue, operational and legacy obligations of the bid. The guidelines, which range from multiple sport handbooks to single sport manuals, are the primary governing documents

for cities, venues and suppliers interested in staging events.

Here is the challenge: each Rights Holder produces their guide independently; consequently, the requirements will differ in terms of scope, language, and depth of verification. Host cities are left with a set of fragmented rules, something that meets an obligation for one federation may not meet the requirement for another, and with no unified standard on how a destination or industry partner strategically plans.

Scholars have recently begun placing these practical documents into wider management theory. The Routledge Handbook of Sports Event Management has compiled governance, sustainability and legacy ideas now reflected in many bid documents, whereas Chappelet's research on activism around controlling Olympic scale has identified financial and operational tensions included in revised manuals. The manuals themself, including the football's stadium-safety and human rights document, the Commonwealth Games shared host selection document, documents containing world-triathlon and athletics championship, and newer manuals produced by organisations such as FIA and World Archery, have been shaped by this scholarship, in that almost all include human rights clauses, carbon impact measurements, and comprehensive medical or security ratios.

This review will bring together both strands, academic analysis of the framework above and the complete range of contemporary bid documents, so that **Northstar Meetings Group** can provide stakeholders with a single baseline of expectations. By developing a common language from commonly distributed requirements, the project enables cities and commercial partners to prepare bids that snuff out the main areas of concern now at the heart of the Rights Holders' ideology.

3. RESULTS

3.1 RIGHTS HOLDERS

3.1.1 CRITERIA FOR SELECTION

The 16 Factor Survey shows that international federations prioritize core operational elements like sports infrastructure, security, and event hosting experience when selecting host destinations. Factors related to inclusion, sustainability, and medical readiness are also valued though slightly less decisive. In contrast, factors like ticket sales potential, personal relationships, and sporting popularity of the host city were consistently rated lower, signaling a shift toward more professionalized and process driven decision making. While audience presence remains important, federations appear to value its strategic and reputational benefits more than its direct financial return. To succeed, the host cities must present credible infrastructure, risk mitigation plans, and a clear commitment to operational excellence and long-term impact. On a scale from 1 (not important) to 5 (critical), the mean for all factors was 3.60, with a standard deviation of 0.38.

The most critical factor was Sports Facilities / Sports Infrastructure. It was rated the highest amongst all the factors, with 71.4% (i.e. 15 out of 21) of federations marking it as critical, a score of 5. It received an average rating of 4.48 and a z-score of positive 2.30. Setting it apart from all other criteria, it proves that infrastructure quality remains the most decisive factor when selecting a host destination.

High importance factors include delegate and visitor capacity, security and risk management, broadcasting capability, event hosting experience and total cost to host. Delegate and visitor capacity had a strong average of 3.95, with most responses being rated 4 and 5. This underlines the importance of physical presence from fans to federations. Security and risk management received an average rating of 3.90, showing that safety, contingency planning, and risk mitigation remain top priorities in host selection. Broadcasting capability was scored 3.86 on average and was marked critical by 7 federations. Its high score reflects the increasing weight placed on media visibility and outreach. Finally, event hosting experience and total cost to host were both rated at 3.81. Federations value experienced and competent local organisers. Federations also value the cost of the events as a core factor.

"The most critical factor was Sports Facilities / Sports Infrastructure. It was rated the highest amongst all the factors, with 71.4%"

Broadly Important Factors include medical and safety facilities, sustainability and legacy commitment, accessibility and inclusivity, and projected income/impact for destinations. Each factor received an average score of 3.67. These four factors sit just above the overall mean and were mostly rated between 3 and 5. This means that although they may not be decisive individually, they represent key support pillars, especially for federations with long-term impact, inclusion, or ROI goals. It is also interesting to note that cost is more important than the income for the Federations.

Factors of moderate importance include human rights and ethics compliance, public transport infrastructure, city's sporting popularity, and VIP & hospitality protocol. Human rights & ethics compliance had a mixed response with an average score of 3.52. A small number of federations rated it highly, but many placed it at mid or lower levels. It reflects growing awareness, but it is not yet a central driver of decision making. Public transport infrastructure averaged 3.24 with no federation rating it as critical and many assigning it a 3. While useful, it appears to be viewed more as an operational detail than a selection criterion. And city's sporting Popularity and VIP & hospitality protocol both scored 3.19 on average. The responses were clustered between 2 and 4 in these criteria, suggesting that these factors are seen as nice to have rather than core priorities for the Federations.

Finally, low importance factors included ticket sales potential and having personal relationships in the destination. Ticket sales potential received an average rating of 3.05. Although 2 federations rated it as critical,

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the majority gave it lower scores. This suggests that direct revenue generation from ticketing is not a leading concern with other strategic and operational factors being prioritized. This goes hand in hand with income not being a priority but in contradiction with IFs valuing the physical presence of the fans. Having personal relationships in the destination had the lowest average score of 3.00, with more than one third of federations rating it 1 or 2. This indicates a clear shift away from informal influence towards structured, criteria-centric selection processes.

3.1.2 BIDDING

The bidding landscape shows that 60% of federations use open bidding while 30% engage in direct negotiations and only 10% rely on invitation only processes. The majority (95.2%) of federations do not involve external consultants during bidding. In terms of bidding duration, nearly half (47.6%) complete the process within 6 months while one-third (33.3%) require 6-12 months.

Federations identified three consistent challenges in their bidding processes. Financial hurdles, including difficulty in securing government support and proving the economic impact of events, are seen as a top challenge. Second, infrastructure and operational readiness. Concerns over venue standards, city infrastructure, and unprepared LOCs are seen as an important challenge. And third, event delivery and strategic alignment. Issues with compliance, contract execution, cultural misalignment, and scheduling conflicts remain a top challenge as well.

To address these issues, successful bids must offer clear financial backing, realistic infrastructure planning and a competent, culturally aware LOC ready to deliver to international standards.

"Securing adequate funding, government support, and financial guarantees has been a common challenge"

Financial hurdles remain one of the main challenges. Securing adequate funding, government support, and financial guarantees has been a common challenge as cited by multiple Federations. Additional concerns include limited financial guarantees during the bidding phase, difficulty in proving economic impact in the newer sports, and variability in government support across different regions. A key pathway to overcome this challenge is demonstrating a clear and sustainable financial model with secured backing by Government or private institutions. Sustainable planning could be the organisers try to create a win-win situation, where the hosts can also make more money by mutual value creation.

Infrastructure & Operational Readiness, meaning ensuring venues meet specific standards, general city infrastructure is adequate, and the Local Organising Committee is competent and resourced, which was also echoed in the 16-factor survey. LOCs sometimes have a poor understanding of the true cost of hosting and the scale and manpower required to host the events successfully. An early and realistic assessment of infrastructure gaps and LOC capabilities is vital; more knowledge sharing can be done from the bid phase. And using existing infrastructure is a plus.

The main challenges in event delivery and strategic alignment include compliance with event riders, management of contracts, managing cultural and language differences, and navigating calendar conflicts or geopolitical uncertainties. To deal with this challenge, an agile, experienced, and culturally aware organising team is essential.

3.1.3 HOSTING COSTS AND FINANCIAL IMPLICATIONS

There is a big range in terms of financial commitments required by RHs for cities that want to host their events; results show a range that goes from as little as $150,000 to over $100 million. This shows there are multiple tiers of international events that can fit any budget. On one side there are niche or emerging events that offer accessible options for cities that are looking to enter the sporting event market, and on the other, there are premium events with high commercial potential, which are a great fit for cities with more developed infrastructure. For example,

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Volleyball World has a portfolio that includes events that range from $150,000 to $25 million, and World Athletics has events that range from $1 million for smaller events to $100 million for its World Championship events. However, there are also some RHs that assume the full cost of hosting their events. An example of this is FIFA, who assumes the full costs of hosting specific tournaments such as the youth world cups. FIFA does this as a strategic investment in development.

One key thing that RHs expect is the provision of financial guarantees. Approximately 70% of RHs mentioned them as an expectation in our research. RHs require these guarantees to reduce risk and as proof of the commitment from the host city. The amount needed as a guarantee varies between RHs; some require the full budget for the event, some require a percentage of it, and others require a fixed amount. One notable finding is that some RHs prioritize infrastructure readiness over financial guarantees. This suggests that sometimes investments in infrastructure can be more important than having financial assets such as cash guarantees.

A positive finding for host cities is that 76% of RHs reported that they contribute financially to event delivery. Contributions from RHs can be financial or non-financial. Examples of non- financial contributions include referees, staff or VIK, while examples of financial contributions are prize money and monetary support that can go from small investments of around $30,000 to strong ones reaching 100 million. There are RHs that make both financial and non-financial contributions, such as the FIA which contributes with the development costs for the first editions and with sporting staff. Sharing financial responsibility shows that RHs are often strategic partners rather than just passive beneficiaries. Cities that have objectives that align with RHs strategic objectives such as athlete development, reach target audiences, and commercial expansion, may receive bigger financial contributions from RHs.

"Two thirds of RHs report having a dedicated marketing budget to promote their events"

In terms of revenue sharing, our data suggests that RHs normally keep between 20% and 50% of the event's revenue, though multiple organisations were unable or unwilling to disclose this information. Revenue sharing models change from RH to RH, for example FIFA often fully funds the costs of youth tournaments and uses ticketing revenue to cover those costs, while on their main events like the FIFA World Cup, it keeps global sponsorship and ticketing rights, which they use to fund their other events. There are also RHs like World Athletics, that allow the host to keep 100% of ticketing revenue, and to look for regional sponsors and hospitality, while they manage global partnerships. There are different structures when it comes to revenue sharing, but across them direct ROI from revenue sharing is often limited, and cities must highlight indirect benefits like tourism, global branding, and legacy.

When it comes to marketing, 44% of RHs expect host cities to support the promotion of the event. Some ask for a monetary contribution that goes from $20,000 to 10% of the total budget, while others accept VIK arrangements, such as free media placements, tourism campaigns, or digital marketing in social media. This represents a big benefit for cities as they can contribute with existing assets or VIK instead of cash.

Two thirds of RHs report having a dedicated marketing budget to promote their events. However, these budgets seem modest, with ranges between $20,000 and $200,000. This suggests that hosts will need to take on bigger roles to increase visibility and engagement for the events. For destinations, partnering with RHs that already invest in marketing can be beneficial, but they should be ready to lead promotional efforts when necessary.

3.1.4 GEOGRAPHIES

Global sports RHs are showing more and more flexibility on where they host their events, selecting host cities based on criteria such as infrastructure, safety, political stability, and connectivity, rather than loyalty to specific regions. Destinations like Dubai, Montreal, Monaco,

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and Abu Dhabi were commonly mentioned as ones that meet the standard requirements to host events. This shows that cities that have strong reputations and infrastructure that is ready for the events, even in non-traditional markets, can compete for international events.

Today, the geographical preferences of right holders show there is a strategic balance between traditional markets and regions with potential to grow. Currently, Europe dominates the hosting landscape, with 95% of RHs operating events there, which is no surprise given the continent's concentration of infrastructure, institutional relationships, and fan bases (Chappelet, 2016). 86% of RHs host events in Asia, showing the continent's growing role as both a key commercial hub and a zone with great focus on athlete development. South America also sees significant activity with 76% of RHs holding events there.

It is important to note that 71% of RHs hold events in both Africa and the Middle East, showing the increase in investment and the political will in these regions, especially in the Gulf states where sports are used as a tool for national image building and economic diversification. 62% of RHs are active in North America, which may seem low given the continent´s commercial power, however it shows the high cost and competitiveness of the region. Oceania with 48% is the least active region, but its strong sport culture and political stability make it a great opportunity for RHs to explore.

When asked about future priorities and future hosting plans North America was mentioned as the top target with 71% of the RHs reporting plans to grow their presence there. This is consistent with industry trends, including the upcoming 2026 FIFA World Cup and 2028 LA Olympics. The Middle East and South America follow with 53%, indicating the trend will continue as Middle Eastern countries are establishing themselves as key players in the global sports ecosystem and South American countries are attracting big international events like the Women's Football World Cup 2027 in Brazil and youth tournaments like the U-20 Football World Cup 2025 in Chile. Africa, Asia, and Oceania are all seen as priority expansion zones for 47% of RHs, showing a push for global equality and truly global sports. Finally, despite its current dominance, Europe was only mentioned by 29% of the RHs, possibly because they are already well established there, but it also shows a shift toward diversification, RHs are actively looking to expand their geographical reach, attract new audiences and collaborate with national governments whose strategy aligns with that of the RHs. Right Holders are no longer focusing only on traditional markets, they are now looking into regions that offer long term strategic value, whether that is in terms of infrastructure investment, fan growth, or commercial partnerships.

3.1.5 DELEGATES, VISITORS, AND EVENT SCALE

We have examined the responses from International Federations (IFs) regarding the average number of delegates (athletes, coaches, and staff) who are attending their major events. Through the answers, we could identify variable data according to different categories such as the nature of the events, the type of federation, the scale of the events, and the disciplines at the events.

Volleyball World, FIH, BWH, ITTF, and World Athletics did not give a concrete number for the

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number of delegates in their events; they put stress on the fact that the average number of delegates during their events depends mostly on the type of events.

"the minimum required for most IFs is a hotel with 3 stars for participants and 5 stars minimum for officials"

Approximately ¼ of the federations couldn't estimate the number of delegates. For the remaining ¾ of respondents, we could determine a minimum of 200 persons, and a maximum of 70 000 persons accredited. Which led to a total average of approximately 6,100 people being accredited. Meanwhile, we could clearly identify some small federations such as ISSF whose events don't require a lot of people (18 people). On the other hand, some federations, like IWGA with 10,000 people accredited and FIA with 70,000 people accredited, require a lot of delegates. Another point that we would like to highlight is the fact that most IFs have the number of delegates in the range from 200 to 5000 people.

To the question regarding the average number of spectators/ visitors, 3 IFs did not provide any answer (ITTF, FIH, and BWF). While World Athletics stressed the fact that it is event specific, World Aquatics mentioned the fact that it's difficult to define due to having a big range of spectators at their different events. The Federation International of FootGolf mentioned that visitors/ spectators are an important aspect that they are working on. The other answers mentioned a minimum of 100 spectators for World Triathlon and a maximum of 1,000,000 spectators for Commonwealth Sports. Meanwhile, the majority of IFs which responded to the survey have several spectators included in the range of 100 to 10,000 spectators per event. Only three (3) IFs have events attracting a higher number of spectators, around 45,000 spectators for FIA, 200,000 for FIS spectators, and 250,000 spectators for IWGA.

On the aspect of event duration, the distribution of answers came as follows:

- 5 answers for 3-5 days
- 5 answers for 6-10 days
- 4 answers for 10+ days
- 3 answers for 1-2 days.

Most events take place either for one week or 2 weeks. IFs with events lasting more than two weeks include Commonwealth Sports, International Esports Games, Federation International of FootGolf, and FIH. Finally, we have the 3 IFs (FIBA 3x3, World Triathlon, and World Breaking Classic) whose events are generally between 1 and 2 days.

Other criteria that we analysed were the type of hotels and number of rooms/hotels required for their events. To these questions the answers were mostly converging toward a standard from 3 to 5 stars hotels. But a range of respondents mentioned the fact that the choice of hotels depends on different aspects such as the types of events and the number of registrations. Meanwhile, some decided not to provide an answer to this question (FIH, BWF, and ITTF).

According to the answers, the minimum required for most IFs is a hotel with 3 stars for participants and 5 stars minimum for officials.

The minimum number of rooms needed was mentioned by FIA with 15 rooms in 5-star hotels, and 160 rooms in 3- and 4-stars hotels. The maximum number of rooms received was provided by Commonwealth Sport which is 30,000 rooms without any specification of hotel quality. Many IFs have a minimum requirement for 4 to 5-star hotels, and the number of rooms on average is in the range from 50 to 2,000 rooms. One exceptional answer was provided by IWGA with 1,000 rooms of 4 to 5-star hotels, and 10,000 rooms of 3-star hotels for participants.

For the choice of venue, IFs focused on the fact that it may depend on the event being outdoors or indoors. But most IFs mentioned 1 venue respecting the specifics of their sport, and some preferably were willing to have 2 to 3 venues. Other IFs made the choice to have big venues with different FOP created. And for some outdoor events, there is a possibility of creating a temporary venue. That's the case for Volleyball World, who can use tennis courts for some events like Beach Volleyball events. Most of the IFs mentioned the importance of having meeting rooms for participants and conference rooms.

3.1.6 POPULARITY AND MEDIA COVERAGE

Nowadays broadcasting has gained a huge impact on sports events. That's why it was important for us to have the point of view of our IFs. According to the answers received, the majority of all the IFs answers revealed an important place dedicated to broadcasting during events. All of them replied that it is essential to have National TV Broadcasting/streaming during their events.

Apart of FIH who didn't provide an answer to this question, we had 4 IFs (Commonwealth Sport, BWF, ISSF, and World Breaking Classic), whose answers marked that TV Broadcasting/Streaming are important but not essential to their events. In terms of average viewership, the answers were quite different because some IFs mentioned that it may depend on the type of events. Some IFs like Sambo or FIFCO mentioned an average of viewership of around 14.3 million and 3 to 4 million, respectively.

Most of the IFs mentioned that they require that cities provide them with dedicated broadcast facilities like a media centre. And it will be combined with their own broadcasting infrastructure that they bring.

3.1.7 SAFETY, SECURITY, AND MEDICAL STANDARDS

Safety, security and medical standards, security planning, and risk management: An overwhelming majority of Rights Holders require significant security planning in relation to the host cities. Specifically, 18 of the 21 in the survey confirmed that host cities had to provide/supply a security plan which indicates that Rights Holders are focusing on planned security operations. One minority (ISSF, International School Sport Federation and World Breaking Classic) do not specifically require a security plan, and we usually find them managing smaller events. For example, The International World Games Association (IWGA), which organises The World Games, provides prospective host/candidate cities with a comprehensive security questionnaire.

Candidate bidders are required to acquire government guarantees related to event safety, put together detailed risk assessments detailing both broad threat assessments as well as specific risks (i.e. activist, terrorist activity), and develop an integrated command plan involving public and private security agencies. Approximately half of the Rights Holders (10 of 21) took it a step further requiring an independent risk assessment to be made, and most do indeed interact with independent third-party experts to assess local risks before they even consider bidding.

Importantly, FIFA and Commonwealth Sport insist on formal risk assessments and it is worth noting that both Rights Holders have experience with significant event mandates and complex security environments. In contrast, some federations (e.g. BWF, FIH) depend solely upon the home team's own assessments and protocols for safety without a separate independent assessment, particularly if they are travelling for arena or other easily controlled environments or events built solely upon established circuits.

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Medical Services and Athlete/Public Safety: Medical services (and first-aid) requirements imposed by Rights Holders can vary quite a bit, although all Rights Holders impose medical and first aid requirements on hosts. Some Rights Holders have only basic medical services requirement with even more limited guidance, as they would only require that hosts provide at least 1 medical station/team per venue, while others might have more detailed minimum requirements based on size. For example, Commonwealth Sport (for Commonwealth Games) have stated that all competition venues should have medical facilities, and at the athletes' village, a polyclinic should be provided, given the multi-sport and multi-venue context of the games. Several federations even give a specified minimum number of ambulances on-site at medical stations; for example, FIFA requires a minimum 2 clearly defined on-site medical services (1 serving players and 1 serving spectators), and the International SAMBO Federation asked participants in their survey to specify 4. The most extensive standards are from World Triathlon, who specify very detailed standards for medical services in their events. World Triathlon rules outline strict ratios of medical personnel to athletes, and thorough emergency coverage: "Two paramedics per 100 athletes is the minimum… one physician per 200 athletes (minimum of four physicians) … one nurse per 100 athletes (minimum of six nurses). Two doctors must be present and on duty for the entire event…." Furthermore, the hosts of the major triathlons must have the necessary number of ambulances (minimum of three, plus one for every 500 athletes) placed at designated locations throughout the course and have clear access and a communication network; they must also have medical spotters along the swim, bike, and run. These selections illustrate high level of caution towards safeguarding the well-being of the athlete, who is racing in an open and potentially risky event.

"Three quarters of organisations expect human rights and labour laws compliance from their hosts"

Regardless of individuals, Rights Holders permit medical delegates or chief medical officers to manage the health services during the event. Generally, event physicians are given or have the authority to ask athletes to withdraw for safety, which is demonstrated in the Triathlon policy. Many also require local hospitals to be informed of the event in advance and to be incorporated into emergency response plans. When it comes to crowd medical services with respect to spectator safety, there is expectation that it will be proportional to venue size, e.g. FIFA's tournament bid requires that spectator medical facilities must be on-site and clear emergency evacuation plans are stipulated in accordance with stadium sizes. In summary, the level of stringency varies, some smaller events have only basic first aid, while others require full field hospitals, but it is an overwhelming reflection that every Rights Holder has to take medical preparedness and risk mitigation into account. Rights holders will also generally insist that each host have detailed emergency action plans, sufficient insurance coverage for participants and local emergency services coordination. The reason for this common approach is to provide safety and protection for both athletes and public, which comes as a result of duty of care and taking past incidents into consideration in ensuring that athlete welfare and public safety are viewed wisely as inflexible areas of hosting rights.

3.1.8 HUMAN RIGHTS, ETHICS, AND SUSTAINABILITY

In recent years, international Rights Holders of sports have made significant advances in their expectations regarding issues of human rights, environmental sustainability, and other ethical consideration for host cities. In the survey, approximately three-quarters (16 of 21) of the organisations asked about recruitment expectations, expect human rights and labour laws compliance from their hosts, and more are doing sustainability around the environment and about two-thirds (14 of 21) expects accessibility and inclusion (disabled access) considerations. Additionally, 16 of the 21 surveyed indicated they are monitor long-term legacies

3. RESULTS – CONTINUED

of their events in terms of aspects such as economic impact, social benefits, or use of infrastructure.

As demonstrated by the results, there is an overarching commitment to ethical and sustainable practices of event management. Common stakeholder requirements on the issue of human rights includes expectations of compliance with local and/or international labour standards, inspirable non-discrimination policies, and sometimes getting the community involved or supply-chain ethics clause. One interesting thing to highlight, is FIFA's advance in embedding human rights elements in bids prior to decision-making. Since 2017 FIFA has required any country bidding on a World Cup what type of human rights risk assessment they undertook and what mitigation strategies they have included as part of their bid. This goes well beyond FIFA's prior commitment and is based on the United Nations Guiding Principles on Business and Human Rights. It means World Cup hosts will need to proactively address issues such as workers' rights, equality, freedom of expression and risks of corruption well in advance of the event. FIFA was the first sport body to both adopt a human rights policy and embed this into its requirements for hosts, and others are beginning to follow suits.

Many Rights Holders articulate these responsibilities in the context of their values and policy. Commonwealth Sport (the Commonwealth Games Federation) makes the connection between the principles of event hosting and three of its values, humanity, equality, and destiny. In its 2023 - 2034 strategy Commonwealth Sport includes as a priority "demonstrate leadership in protecting and promoting safe fair, clean accessible and sustainable sport". Behind this ethos is a formal Human Rights Policy Statement (adopted in 2017 and updated in 2022) that communicates the commitment of Commonwealth Games to mainstream human rights considerations across the planning and delivery of the Games. Likewise, the International World Games Association (IWGA) has identified sustainability as one of its three main organisational values (the other two being excellence and inclusiveness). The IWGA obliges host cities to commit to strict sustainability pledges. First, in 2020, the IWGA committed to the UN's Sports for Climate Action Framework and in 2024 introduced landowners with a robust Sustainability Strategy for The World Games that fits with OECD frameworks. Future hosts are required to, among other things, conduct a full Environmental Impact Assessment (EIA) prior to the Games, as well as achieve carbon neutrality of the Games. Cities should incorporate future planning and sustainable venue constructions, waste management plans (for example, reducing single-use plastics), protect local biodiversity and ensure the event creates genuine community social and economic benefits. The comprehensive requirement demonstrates how The World Games identified opportunities to use their bidding process to encourage sustainability delivery that runs beyond the Games.

"The International World Games Association (IWGA) has identified sustainability as one of its three main organisational values"

Several smaller federations have also developed notable sustainability and human -rights initiatives. The World DanceSport Federation (WDSF), the governing body for dancesport and breaking, has launched a "Sustainability Programme" to integrate environmental accountability in all its event. WDSF developed an Operating Policy on Sustainability and an "Environmental Sustainability Menu" providing actionable guidance for member nations, clubs, athletes, and officials to implement green practices.

This menu-based model enables local organiser to select sustainable choices that have "positive environmental impact and a lasting mark." Many human rights and inclusion Rights Holders expresses very similar themes: inclusion of all (with specific requirements for disabled access, gender parity in venue amenities etc.), guarantees against discrimination, and in some

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cases community outreach program linking to the events.

Some organisations have not yet formalised these requirements. For example, World Aquatics (formerly FINA) mentioned in the survey that they do not yet impose criteria related human rights, environmental issues or accessibility on its hosts and do not account for an event's legacy, a position less common amongst its peers. This may suggest an ongoing reliance on Olympic criteria for its world championships or an opportunity for future growth. Nonetheless, the general trend is that most international Rights Holders now recognize good governance, sustainability, and human rights as core values of event hosting and implement process through host city contracts and conditions to enforce these values. This shift is unavoidable and is driven by internal commitment and external influences (such as athlete group, public opinion and others like the Centre for Sport and Human Rights). Many have established dedicated commissions or working groups on topics like sustainability, safe sport, or human rights. For example, World Athletics convened a Human Rights Working Group and acknowledges that protecting the "human rights of everyone involved in sport" is critical to its operations. In sum, the majority of Rights Holders are not only requiring compliance with set standards, but often providing tools, policies and monitoring to help ensure those standards are met, from pre-event due diligence through post-event legacy assessments.

3.1.9 TICKETING AND HOSPITALITY

Rights holders vary widely with regard to ticketing and hospitality approaches, reflecting different event types, size of audience and commercial strategy. Ticket sale volumes also cover the full spectrum: large multi-sport (and individual sport) events sell tickets in the hundreds of thousands to over a million spectators, while some Rights Holders have very small events or events where tickets are not yet developed. For example, the Commonwealth Games typically have a target of around 1.5 million tickets sold across the event which confirms a large spectator base and revenue source. FIFA's response to the survey for the FIFA U-20 Women's World Cup 2024 provided a projected ticket sale range of about 400,000 tickets, even for a youth World Cup. Mid-tier single-sport World Championships (e.g. skiing, athletics etc.) vary across the tens of thousands to perhaps hundreds of thousands of tickets (the International Ski Federation estimated 10,000 – 200,000 tickets depending on event). On the other side of the scale some Rights Holders reported very low or negligible ticket sales; to give some examples, the International SAMBO Federation has averaged approximately 1,000 tickets sales; the Federation of International

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Foot Golf were still evolving their ticketed events and the International School Sport Federation indicated they essentially had 0 public ticket sale opportunities because their events were school-based events where spectators were not paying to be there. It is noteworthy that the International Esports Federation (IESF) accepts that all its World Championships to date have not charged any ticketing fee and have allowed free entry for fans, a practice that looks to grow exposure and audiences rather than income. This broad scope backs up the idea that ticketing strategy is informed by the type of sport and audience. Established sports with an audience and spectator base (e.g. football/rugby/etc.) will seeks to grow through attendance and viewership revenues while emerging sports may seek to focus on potential entry and exposure over ticket sales.

While looking at VIP hospitality, just over half of the participating Rights Holders put a strong focus on VIPs, sponsors, and dignitaries while others tended to keep hospitality minimal. 12 of the 21 said they had a requirement for dedicated VIP hospitality programming as part of their event obligations. In fact, for all the mandated requirements hospitality built in as part of the event obligation are generally from Rights Holders that host larger/ commercial events: e.g., FIFA, Commonwealth Sport, World Aquatics, FIS (skiing), FIH (hockey), World Triathlon, BWF (badminton), and even World Breaking Classic who expect that hosts provide hospitality type services. By contrast, eight Rights Holders (most were smaller federations) including FIFCO, corporate football, IESF, Foot Golf, ISSF shooting and ITTF would not require a VIP hospitality program before or during their event, usually due to scale or different stakeholder beliefs about their event.

The level of hospitality requirements can be quite high for the top events. For example, ITTF's commercial entity (World Table Tennis), provides in-depth instructions about how to manage VIP service for its World Championships and WTT events. When hosting, there is more than one level of VIP as sponsors, corporate guests, and federations all expect a good experience. The ITTF/WTT event manual call for at least three VIP lounges: the normal VIP lounge, a "Gold VIP" lounge to acknowledge the very important guests, and a specific "ITTF/WTT Family Lounge", specifying capacity and amenities for each area. The Local Organising Committee (LOC) is to appoint a VIP Manager to manage all VIP hospitality, and a staff/volunteer team are required to manage the VIP area and assist with hosting the guests. The guidelines also stipulate contents of the welcome packs for the VIP guests (VIP accreditation, Event Programme, souvenirs etc) and describes required location of the lounges (close to field of play and a good view), furnishings, catering and security (controlled access with one entry point). While extravagant hospitality schemes seem absurd for amateur events to many, it is important to remember there are sponsors and important stakeholder that must be taken care of in trenches to potentially affect the commercial viability and reputation of the event.

The upper limits of hospitality expectations are FIFA World Cups; for the 2027 Women's World Cup bid specifications, each stadium was required to have a substantial number of large hospitality (perhaps 5–8% of total capacity reserved for VIP / hospitality) and 'outer perimeter' hospitality villages for corporate entertainment. In addition, World Cup venues are expected to have a VIP tribune and hundreds of single and multiple VIP seating options (for example at least 800 VIP seating in the event of the final match). This creates a clear example of how mega events build hospitality in an integrated way into event experience and revenue model (high-end ticket packages). This stands in contrast to several smaller events where there is likely no requirement for an event host to provide gala dinners or VIP sections or at their option may decide to keep their event informal and social (therefore the Rights Holder has no fixed requirement).

The area of ticket pricing authority is another area where policy differs. In some cases, Rights Holders set ticket prices centrally or provide a tight pricing framework to achieve consistency while also protecting event brands, and in many cases, the Rights Holders leave it to the local expertise of the local organisers. The survey asked

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whether the Rights Holder set ticket prices or whether the host city / host organisation set ticket prices (or jointly agreed).

As displayed above, for close to half of the Rights Holders (10 of 21), the host city has authority over determining the ticket advertising or ticket prices for the event. About 38% (8 of 21) formally list a joint decision approach, in that the Rights Holder consulted and determined with the host what the ticket advertising and pricing will be. This approach is especially common with events that are in a financial risk/reward sharing arrangement or where ticket prices must consider a balance of local market conditions and the overall global value of the event. Furthermore, only 3 organisations (around 14%), reported having the rights holder set the ticket advertising and/or prices for events. The two organisations were the ITTF/WTT an d FIBA 3 × 3. In the example of ITTF, it is possible this reflects the management of a central line of events using a professional circuit. World Table Tennis is the Rights Holder, with an agreement to handle the commercial side of compiling an event commercial and program schedule. In the case of FIBA 3 × 3 Basketball, the survey indicated that when hosting locals keep all income from ticket sales, however the Rights Holder provides some guidance , this suggests a hybrid arrangement where FIBA 3 × 3 has some active say in pricing to make sure it matches with their model of world tour (even if it is actually the host that runs ticket sales operationally).

3.2 HOST CITIES

3.2.1 HOSTING AND INFRASTRUCTURE

The host-city organisations invited to participate in the survey all have the same philosophy: "more events, bigger events". Sixteen (89%) are either building new venues or are in the planning stage, and 12 (67%) large-scale event holders want to host even more events per year than they already do. However, the starting point are very different. Roughly 61% rate their current stadiums/ fields a 4 or 5 out of 5, but 39% did not rate their facilities high, a rating of 2 or lower. There are a few outliers. For instance, Liverpool rated itself a 2/5 for infrastructure and is positioning itself to be a host for Olympic-calibre competitions. This alludes to an often-big gap between aspirations and reality when it comes to facilities.

When asked to list the sports that they cannot yet host, two large gaps were present, regulation size athletics track, and 50 m competition pools. Eight respondents (44%) identified at least one of these world-class athletic facilities as a major missing piece to their repertoire of facilities. The second most widely identified gap was multi-field soccer/lacrosse complexes that five North American markets noted as part of their gap. On the other hand, ice arenas, indoor courts and baseball stadiums are thick in most portfolios, with two-thirds of the respondents rating those a 4+ on the five-point scale.

Event mixes tend to skew to the professional and elitist end of the continuum; 17 of 18 cities (94 %) attract professional events, 15 (83 %) seeks Olympic or world-championship properties, and 14 (78 %) still attract youth and amateur tournaments for a stable flow of visitors. Esports are already on the radar for 13 respondents (72 %), which bodes well for agency take-up and potential mainstreaming. One-third of destinations: Las Vegas, Berlin, Salt Lake City, Dallas, Phoenix and Indiana report annual events of 100 or more; a second cohort manages 20-100; and a third niche group (Liverpool, Trondheim, Isle of Man, Kin Productions) handles fewer than 15 annual event, but tends to focus on marquee or specialty events.

Financial incentives are the main competitive lever. Sixteen organisations (89 %) subsidise events, but the incentive vary widely, ranging from a sub-$100 k youth-event fund in Phoenix to a US$ 40 million annual bid fund in Las Vegas. Typical U.S. city sports commissions operate with US$ 400,000 – 2 million. State level organisations such as Maryland could fund up to US$ 10 million per year, and the provincial tier funds event at a community level through category grants.

Networking is undeniably ubiquitous. Almost all respondents considered the value of face-to- face meetings worth it, and 16 of them (89%) attend key trade shows like Sports ETA or TEAMS. Roughly 61% of them are members of a sport event association, mostly Sports ETA, using these networks to share best practise and chase Rights Holders. Only Sports Administration generated a result that contrasts the networking norm, as it is grounded in officially allocated multi-sport games.

Cities can be divided into four readiness quadrants, based on both infrastructure scores and event aspiration:

- Established Hubs (6 cities): high infrastructure (avg. 4.5 / 5) + high-event volume (>100 / yr), go after all possible tiers of events. (Las Vegas, Berlin, Salt Lake City, Dallas, Indianapolis, and Phoenix)
- High-volume Tourism Centers (4): infrastructure avg. 4 / 5, 200-1600 events; LOT of youth and amateur events, happy with what they do. (Myrtle Beach, Maryland, and Norwegian cities)
- Quality-over-Quantity (4): infrastructure avg. <3 / 5, <30 events; after marquee rights, building some advantage with signature venue. (Liverpool, Denver, Detroit, and IMG)
- Emerging/Niche Hosts (4): various infrastructure score, 20-100 events; focus on some niche or specialty (eg: winter sports or island games) market and fill that gap. (Isle of Man, Røros Region, Trondheim, and Singapore)

The success metrics are heavily weighted to the tourism-economic return, while 89% of respondents ranked “room-night generation” & “destination awareness” as a 4-5 importance, the community health issue ranked only 2.6 / 5. In summary, investment in infrastructure for sport event is being driven less around what happens for local civic wellness, and more about the implicit value from visitors attending and possibly spending, and potential global viewership.

3.2.2 HOSPITALITY

Sports facilities win bids, but beds, planes and buses deliver the experience, and almost every surveyed destination believes they are strong here. Half the organisations gave themself a perfect 5/5 on their hotel quality, and none scored below a 3. Room inventory is just as strong, with 9 respondents (50%) rating their room inventory 5/5, with inventories in the tens of thousands. But there is clear exception. Detroit rated a room inventory rating of 2/5, and highlighted “more hotel rooms” as it is one most import need, while Liverpool, though it rated well quality-wise, admitted to not having enough large hotels to accommodate concurrent conventions and championships.

Access through air has the highest score in the survey: 89% of cities rated themselves 4 or 5 regarding international access, citing either multiple daily long-haul flights or being close to a major hub airport. Only Berlin and Trondheim rated themselves a 3 and both cities are advocating to airlines for

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direct inter-continental flights. Ground access tells a more fragmented story. While 78% consider their road and public transit networks good to excellent, a small number cite serious deficits: Myrtle Beach (2/5) has no public buses or rail; Dallas (3/5) want a more extensive regional transit system; Isle of Man is working on ferry and air frequencies as a way to manage their literal island isolation. If mature metros capitalize on subways and commuter rail, resort areas struggle to effectively get crowds from the parking lot but to set an example of access.

Service performance rounds out the hospitality landscape. Half of respondents rated hospitality staffing and customer service a 5/5, in part as their convention-trained workers, mainly from the same employer/ profession, add significant value to the service. Having rated else-wise, Detroit and Myrtle beach take a more cautious 3/5 for inclusion of depth of services when children are in school. Food & Beverage scores follow the pattern of staffing: All-star cities boast celebrity-chef hotspots and craft-brew scenes, while a small number confess limited late-night dining or group-dining options.

While confidence surrounding our event capabilities is consistently strong; transport infrastructure represents the number one "wish-list" priority for improvement in 10 of the 18 surveys (56%), typically with requests for more terminals, more rail spurs, and more loops of light rail to better connect stadium

Three hospitality archetypes emerge from the quantitative ratings and open-ended responses:

- Full-Service Mega-Destinations (6 cities): 4.5+ average on hotels, F&B, air, and ground transit. Las Vegas as an example had 150,000 rooms, a top 10 global airport, and restaurants and bars open 24/7, therefore has been able to service everything from NFL Super Bowls to esports festivals without encountering capacity constraints. (Las Vegas, Dallas, Indianapolis, Salt Lake City, Phoenix, and Singapore)

- Competent but Capacity-Constrained Markets (7 cities): solid service levels (≥4/5) but in at least one case, they do not have adequate inventory (usually beds or flights) to support mega-events. Berlin is a prime example: world class venues with world- class service but are currently lobbying to add more direct flights; Phoenix can host thousands of visitors in world-class hotel infrastructure, but has extremely tight room blocks when the NFL arrives for the Superbowl. (Berlin, Denver, Liverpool, Maryland (state-wide), Innovation Norway, Sports Administration (Asia), and Trondheim)

- Growth-Stage or Seasonal Resorts (5 cities): Mostly mixed scores and significant structural gaps. In Myrtle Beach, the weakest public transit system in the US. and compression of hotel supply during peak season creates friction for visitors; for Isle of Man, the bottleneck leading to ferry service makes it impossible for overseas attendance; and Detroit simply cannot accommodate a multi-sport festival because of a lack of hotel rooms. All these cities are reliant on either event-period transport (shuttles), charter flights on airlines that benefit from our supportive directive to stage sporting events or slowly opening new hotels as a product offering.

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clusters to entertainment districts. Hotel expansion is a close second on the wish list (seven mentions), especially in second-tier metros who are looking to leap into the mega event category. It is also interesting that only three respondents pointed to "soft" upgrades, such as training on service skills; most followed bricks and mortar as the binding constraint.

Hospitality-savvy destinations understand that creating a seamless guest journey means there is a better chance of winning future bids. Ninety-nine percent, track "room nights generated" as a core KPI, while cash-per-bed occupied is directly linked to event-generated ROI. Two- thirds, also track visitor perception surveys or Net Promoter Scores after the event, while feeding their findings into the rational for their general hotel, airport, and transit capital planning. Conversely, only a few respondents are explicitly measuring resident sentiment at all; even to question whether they were perhaps resentful of being ground zero for some crowded event, or if this resentment was tied to price increases on travel and/or entertainment.

Ultimately, incentive strategy goes well beyond venues: 14 cities provide hotel-tax rebates or reduced-price blocks of rooms to organisers, while roughly half negotiate airline charter deals or baggage fee-waivers for teams participating in their event. Furthermore, these hospitality incentives can equal or even exceed direct cash incentives, which again highlights that, in a competitive market, even world-class stadia will require world-class visitor amenity to win.

3.2.3 STAFFING AND STRATEGY

To better analyse the staffing and strategic importance of sports events in cities, we asked them four (4) major questions. The answers to these questions helped us understand how cities foresee sports events.

Out of 18 answers, only 3 organisations replied that they do not have people dedicated only to sports events. Another organisation replied that it does not have a staff dedicated to sport event organisation, but this is being studied by the senate of the country/city. This aspect shows a clear interest related to sport events organised by these institutions. The other fourteen organisations replied that they have at least one dedicated person whose work is focused on events organisation. Among these institutions, the number of people dedicated to sport events varies from one country to another, and from one continent to another.

The minimum number of people dedicated is one and the maximum number is 8. Some institutions have 3 people; the majority have 2 people dedicated to sport events organisation and two institutions have respectively 7 and 8 people dedicated to sports aspects.

To the question of whether the people dedicated to sports events organisations are solely dedicated to sports, most of the organisations (66%) replied yes. That means that twelve institutions have dedicated at least one person among their staff to focus purely on sporting aspects. That shows how these institutions prioritize sports nowadays. Having staff dedicated only to sports also means that they bring added value and ROI accordingly.

The six other institutions replied that their staff are not dedicated only to sport. They specified that these people also are dedicated to different tasks. Among these they mentioned administration,

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guidance on national sports governing bodies, sales, international market, youth, grassroots, cultural events, arts events, vintage train events and car owners' clubs, conventions, mice and congress. These other tasks are somehow related to the entertainment world and have a strong connection with passion, just like sports.

All the eighteen (18) cities mentioned that their destination/city places some degree of importance on hosting sports events. Six (6) institutions rated it important, while 7 rated it very important to host sports events. And five (5) rated highly important to host sports events in the cities. The strategies of all the respondents regarding hosting sports events are quite different. Some give high importance to hosting sports events, which means they are ready for any sacrifice to host any sports event in their city. And some of them are at peace with the idea of hosting or not hosting a sport event.

3.2.4 REASONS TO HOST

Host cities prioritize economic and tourism outcomes with Attracting Future Visitors, Room Nights, and Destination Awareness rated highest. In contrast Health and Wellness ranks the lowest, indicating limited focus on public impact. Cities fall into four motivation types from tourism driven to holistic with most valuing short-term returns. Event organisers should lead with tourism ROI and tailor their messaging to city profiles, while integrating legacy and social value where relevant.

AVERAGE SCORES PER CRITERIA

ATTRACT FUTURE VISITORS — **4.39**
Top criteria overall, long term tourism gain is a priority for most host cities

ECONOMIC IMPACT — **4.00**
Important and consistent across most hosts

COMMUNITY DEVELOPMENT — **3.78**
Moderate importance, community outcomes are valued

HEALTH AND WELLNESS — **2.94**
Lowest priority area overall

Host cities motivation can be booked in 4 clusters. The first one is tourism and economic growth focused cities, they prioritize Room Nights, Attracting Visitors, and Destination Awareness. These cities marked 4 and 5 across those categories which puts an emphasis on short-term economic benefits and long-term tourism branding. Cities in this cluster include Myrtle Beach, Phoenix, Berlin, Dallas, and Salt Lake.

The second cluster is balanced development-oriented hosts; they prioritize a mixture of tourism goals and local impact creation. These cities also emphasise on Community Development and Quality of Life. They often score 4s and 5s across multiple categories. This cluster includes Sports Administration, Liverpool City Council, Rada Reiseliv SA, Trondheim, and IMG.

The third cluster is holistic cities a case of all round high scores, this is the case of Kin Productions Pte Ltd (i.e. Singapore) who Scored 5 across all categories which is a unique outlier. It prioritizes legacy, brand, and well-being equally. This could be due to either being aspirational or it could suggest alignment with multi-dimensional event objectives e.g. sustainability, wellness, and inclusion.

Finally, the last cluster is lower scoring cities like Las Vegas CVA. They score mostly 1–3 except in Room Nights. This shows a narrow focus on short term

3. RESULTS – CONTINUED

commercial benefits, possibly from experience with high tourism turnover.

From the list of reasons to host, 3 were ranked as high priority (4 or higher). Attract Future Visitors is rated 4.39: Top motivation is the long-term economic legacy. Room Nights is rated 4.33: It is a hotel and service economy driver. And Destination Awareness is rated 4.28: Critical for tourism due to branding and visibility.

One reason is ranked as being of lower priority (below 3). Health and Wellness is rated 2.94: Low score here indicates limited prioritization of public health impact; this is a potential area for policy improvement and strategic alignment with ESG goals for overall well-being of the society. Also, a surprise factor as it indicates a degree of focus on money.

Urban commissions e.g. Denver, Dallas, Berlin tend to emphasize visitor metrics and awareness, while national tourism boards and Nordic cities e.g. Norway, Rada Reiseliv, Trondheim show more balanced scoring across categories.

When event organisers are selecting a host city or pitching the value of an event they should have in mind that the main focus is the Room Nights and Tourism ROI, these are core drivers for most stakeholders and the pitch should begin with this it is as a core driving factor. They should include a narrative on legacy and brand, long term awareness and visitor attraction are universally attractive, and it works as an important factor for value creation. They should also highlight community and wellness for Scandinavian or progressive cities e.g. Singapore and Norway. And finally, tailor pitch for cities with narrow focus e.g. Las Vegas, for these cities they need to emphasize short term which is economic return, hotel nights and footfall.

3.2.5 INDUSTRY RELATIONSHIP AND FINANCIAL INCENTIVES

Our research suggests a strong and growing interest from cities in engaging with sport right holders through events like conventions and conferences. Approximately two thirds of our respondents are already members of sport-related organisations, such as Sport ETA and IAEH, suggesting there is both a strong base of interested stakeholders and potential for expanding participation with the remaining third. The high percentage of cities mentioning attendance to Sport ETA's events and TEAMS conferences show the role of well-established platforms in facilitating knowledge sharing and business development. It is key to mention that 89% of the cities report attending sport conferences, which confirms that these events are seen as a key driver to building industry relationships and exploring event hosting opportunities.

One key insight from the investigation is the importance of personal connections in the sport events bidding and hosting process. All cities value personal relationships, and 94% of them highlight the importance of face-to-face meetings with RHs. This is aligned with existing research on sports event bidding processes, which highlights trust building, quality relationships, and stakeholder communication as key factors for successful bids (Parent & Chappelet, 2017). The appeal of guaranteed one-on-one meetings with RHs highlights the need for conference organisers to offer valuable networking opportunities.

Also, while there is no RH that dominates city interest, the diversity of organisations mentioned suggests a competitive and open market, where cities are looking for a wide range of events that fit their infrastructure capacities, align with their brand, and image, and meet their strategic goals. Most destinations mentioned having a budget to attract sport events to their cities, ranging from USD 100,000 to USD 40 million, which shows both how serious cities are when it comes to attracting sporting events, as well as the big variation in local investment capacity, something that stakeholders such as RHs, conference organisers and cities should consider when establishing strategic partnerships.

4. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS (RIGHTS HOLDERS)

Rights holders (RHs) have differing financial expectations from cities wanting to host events. There might not be an ask for smaller competitions, while a multi-national, multi-sport championship require multiple site flips. Although Rights Holders expect cities to undertake some level of financial commitment, such as paying for a share of the event coordination, logistics, marketing and advertising, and overall funding of the event, the Rights Holders are increasingly forming or seeking partnerships among and with host cities as a part of a hosting agreement.

International sports events continue to grow globally, with Europe remaining at the centre, while North America, the Middle East, and South America appear to be growing territories. RHs select host cities based on several factors; however, funding of the event is down the list of priorities, whereas the quality of infrastructure, security, political stability of the area, and connectivity are more significant priorities. Cities wanting to host must also think about the size of the national teams and the entourage that accompany delegations, which can vary dramatically and impact decisions of even the type of accommodation such a delegation may look for, to the stadium or venue choices, RHs have a preference for accommodations that are as centralised as possible.

Broadcasting and media coverage are increasingly important. For example, RHs largely expect that the host city will provide them with broadcasting infrastructure or that they will be able to manage media themselves to grow their sport. Safety and security, and medical planning have changed its definition from being optional to a requirement with clearly defined, measurable criteria. In addition, sustainability, human rights, and ethical planning have also become items of the bidding process and a set of social and environmental responsibilities for RHs to adhere to develop community trust with the hosting community.

Selection criteria have shifted away from immediate financial benefits towards readiness to operate and risk mitigation, suggesting RHs are prioritising long-term value over immediate revenue and perceived delivery capability. Where previously audience presence was a KPI, revenue from ticket sales and attendance has become less important; the experience for spectators and managing reputation have emerged as more important than its revenue potential.

RECOMMENDATIONS (RIGHTS HOLDERS)

Rights holders will need to be flexible in their financial models to support their event portfolios with the financial capacity and objectives of host cities. Explaining to host cities the real benefits, such as tourism growth and brand recognition, can add unique partnership opportunities. There should also be some protection against exclusive claims, and geography should still be addressed by considering the infrastructure, political, and market opportunities of the city, specifically for RHs to expand their events around the world.

Rights holders should better articulate what they require from the delegate accreditation process to promote efficiencies and remove unnecessary costs. Establishing their own media platforms can help smaller RHs earn additional revenue, take more control of their broadcast, and engage with their fans better.

Safety, security, and medical planning should all be part of the bid paperwork and annotated with the pre-existing comprehensive threat assessment, so that host cities have sufficient understanding of their responsibilities. Rights holders must also work to ensure human rights, sustainability, and ethics as part of the bidding process to ensure host cities have appropriate proposals that are based on sound, socially responsible, legally required and environmentally sustainable foundations.

Bid evaluations should focus more on the local infrastructure, on-the-ground event delivery experience, and comprehensive risk management than on soft influence elements (such as personal relationships). In addition, audience engagement metrics should also be changed to focus on the quality of experiences and media value rather than ticket sales revenue.

4. CONCLUSIONS AND RECOMMENDATIONS – CONTINUED

CONCLUSION (HOST CITIES)

Cities are more interested in obtaining events to capture economic and tourism benefits, especially hotel occupancy, and destination promotion than they are in community development and health outcomes; these become secondary priorities in the process, which ultimately means that focus is on return on investment, not on outcomes over the short term for social impacts.

Cities are increasingly seeking to secure multiple sports events, despite having gaps in their infrastructure, especially for athletics, aquatics, and multi-sport venues. Some of the cities already had good quality hotels and air access relative to the seasonal demand in hotels secured limitations of housing on existing hospitality stock, and seasonal or peak demand would still limit growth in terms of increasing the numbers hosted.

Some cities still do not have a dedicated workforce management focused in sports events, and not all cities have support available in the area of marketing/specialist personnel.

Relationships with industry stakeholders appear critical to all areas of interest and are particularly important with regard to hosting. Industry stakeholders particularly valued access to intimate industry events, including participation in industry events such as Sport ETA and TEAMS conferences, where networking was considered essential for securing hosting opportunities.

RECOMMENDATIONS (HOST CITIES)

Urban settings should try to submit event hosting bids while ensuring that bids correspond to identifiable economic and tourism return on investment, alongside incorporating longer-term considerations such as branding and legacy impacts. Opportunities to customise bids based upon identifiable local strengths (i.e., environmentally sustainable communities, ESG, inclusion, wellness for growing cities, or economic impacts for cities focused on business) offer ways of distinguishing bids in a competitive market.

Making sure to understand existing critical infrastructure gaps, particularly in athletics, aquatics, and multi-purpose facilities, is imperative to address. For cities struggling with capacity challenges, seeking collaborative regional investment, or partnering with governing bodies to enhance venue capacity are sensible approaches. Cities also need to consider appropriate investment into the hospitality infrastructure, opting to develop hotel capacity, and provide improved transportation mitigations for peak periods.

Staffing approaches should also include at least one dedicated individual to analyse local sports engagement, to initially focus on grassroots or university-based events to consider operational knowledge creation and readiness for hosting larger events. Remaining engaged in the industry, attend relevant networking events that will continue to build relationships with RHs, improve city visibility to RHs, while aiming to submit successful bids. Working with industry event organisers to improve networking and engagement chances can also improve a city's position in the market for international sports event hosting.

Event Host Venue Strategy of Sports Events Rights Holders – Written Report

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