

Evaluation of the Trent Bridge Redevelopment

A report prepared for *emda*

GHK Consulting

6 October 2009

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Evaluation of the Trent Bridge Redevelopment

A report for the east midlands development agency

A report submitted by GHK

Date: 06/10/09

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Document Control

<i>Document Title</i>	Evaluation of the Trent Bridge Redevelopment
<i>Job No.</i>	J43026415
<i>Prepared by</i>	Matt Rayment & Richard Smith
<i>Checked by</i>	Richard Smith
<i>Date</i>	6 October 2009

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1 INTRODUCTION

1.1 The Purpose of this Report

GHK was commissioned by *emda* to assess the economic impact of the ICC World Twenty20 tournament at Trent Bridge in 2009, in order to inform the agency's evaluation of the impact of its investment in the Trent Bridge redevelopment project. This final report presents the results of the study.

The report assesses the impact of the tournament on regional GVA and employment, by investigating and presenting the range of expenditures associated with the tournament and calculating the additional spending for the East Midlands from hosting matches at Trent Bridge.

Without the redevelopment of Trent Bridge Nottinghamshire County Cricket Club would not have won the right to stage tournament matches. The World Twenty20 is therefore considered as the first payback on *emda* and local authority investment. The redevelopment work is discussed in more detail below and in the following section of this report.

1.2 The Trent Bridge Redevelopment

Trent Bridge Cricket Ground, Nottingham, is the home of Nottinghamshire County Cricket Club and has a long and prestigious history as an international cricketing venue. It is the world's third oldest Test ground, having hosted county and Test cricket since 1838. Over the years Trent Bridge has seen many memorable sporting moments, which included England clinching the Ashes victory over Australia in August 2005.

The smallest Test Match venue in England, Trent Bridge has experienced the challenge of maintaining and upgrading ageing facilities. In addition, increasing competition from other grounds has meant that its future as a Test venue has come into doubt.

To address these concerns, and to secure the future place of Trent Bridge in the Test Match programme, Nottinghamshire CCC has implemented a programme of investment over the last 20 years to redevelop the ground and to increase its capacity. This included installation of the new, award winning Radcliffe Road and Fox Road stands, which were opened in 1998 and 2002 respectively.

In 2006, NCCC announced a further £8.2 million programme of redevelopment of the ground. The work included a new stand on the Bridgford Road side as well as new seats in other parts of the ground, a new office block for match day officials and administrative staff, permanent floodlights, and a second electronic scoreboard and replay screen. The redevelopment was completed in 2008 and the new stand was opened by His Royal Highness the Duke of Edinburgh on Thursday June 5, the first day of the third *npower* Test against New Zealand. Crucially, the latest redevelopment has increased the capacity of the ground from 15,400 to 17,000, a step towards the target of 20,000 by 2012.

emda contributed funding of £2.5 million to the redevelopment and is therefore keen to assess the impact of this investment on the local and regional economy. An early payback from *emda*'s investment is Trent Bridge's successful bid to co-host the 2009 ICC World Twenty20 tournament.

This report presents the results on an impact assessment of the Twenty20 Tournament. GHK carried out this impact assessment in June and July 2009.

1.3 Structure of the Report

The report continues in the following sections:

- Section 2.0: presents the study objectives and background to the redevelopment work, discussing the rationale and funding arrangements;
- Section 3.0: outlines our understanding of the various sources of economic impact and the ways in which we have assessed them;
- Section 4.0: presents our analysis of tournament expenditures and revenues;
- Section 5.0 presents our analysis of the impacts of these expenditures and revenues on the regional economy, and in particular on employment and GVA, as well as identifying the benefits for identified local businesses;
- Section 6.0 presents an early stage economic evaluation of the Trent Bridge redevelopment project, drawing on the findings of the economic impact of the tournament, as well as assessing the additionality and the Strategic Added Value of *emda*'s involvement in the redevelopment work; and
- Section 7.0 details the conclusions and recommendations resulting from our analysis.

There are four annexes:

- Annex 1 presents the findings of a survey of spectators at Trent Bridge;
- Annex 2 contains the survey instrument used for the spectator survey;
- *Annex 3* presents the survey instrument used to assess Strategic Added Value in the stakeholder interviews;
- Annex 4 presents details of a survey of local businesses.

2 BACKGROUND AND STUDY OBJECTIVES

2.1 Study Aims and Objectives

The overall aim of the study was to complete an:

Evaluation of the economic impact of staging matches at Trent Bridge, Nottingham during the International Cricket Council (ICC) World T20 England 2009 (cricket tournament).

The brief also stated that *emda* was keen to understand the associated economic benefits to the City of Nottingham and the region of hosting a tournament of global importance. This included understanding and quantifying expenditures by teams, media and spectators in the local area.

2.2 The Rationale for Redeveloping Trent Bridge

The competitive nature of attracting Test Match, ODI and domestic Twenty20 matches is underlined by the increasingly significant requirements placed on venues by the ECB. In 2008, new ECB guidelines were outlined in the facilities manual (TSF2) which established minimum requirements stadia must meet in order to stage international and domestic show-piece fixtures. These requirements include the provision of a permanent replay screen and improved facilities for International Cricket Council (ICC) and ECB match officials. The ECB required these facilities to be in place from 1 January 2009, ready for the start of the 2009 season.

The capacity of Trent Bridge prior to the completed redevelopment work was 15,358. Previous NCCC master planning exercises established a stated aim of increasing the stadium capacity to around 20,000. The most recent development work has increased capacity from 15,358 to 17,000. In addition to increasing match day revenue and other associated benefits for the region from visitors, NCCC recognise the requirement to increase the capacity of Trent Bridge in order to keep pace with other established and emerging Test Match venues.

The permanent seating capacity of other established, and emerging, Test Match grounds are:

- 'Established' Venues: Lords - 29,000, the Oval - 23,500, Old Trafford - 19,000, Edgbaston - 21,000, Headingley - 17,000; and,
- 'Emerging' Venues: Cardiff - 15,600, Durham - 15,000, Southampton (Rose Bowl) - 15,000.

2.2.1 The Funding Model

To retain Test Match status, successful delivery of the redevelopment project was recognised as essential by local authorities and *emda*. The total redevelopment cost was £8.2 million. A funding package was drawn up, with *emda* identified as the largest funder, through a grant of £2.5 million, supported by Nottingham City Council, Nottinghamshire County Council and Rushcliffe Borough Council (through the provision of loans on preferential terms at £1.23 million each). The Club contributed £2 million from its own resources.

Local authority involvement in the project was secured by NCCC at an early stage, with NCCC playing a key role in developing and outlining the business case for all local authorities to invest in Trent Bridge. This ongoing conversation with local authorities not only illustrated the significant economic returns for the local economy resulting from a successful Trent Bridge, but it also helped NCCC investigate ways in which they can assist

local authorities with wider regeneration and community development issues. This issue is explored in more detail in Section 6.

The local authorities provided funding to Trent Bridge through a loan to the Club, rather than grant assistance; the loan was provided at a more favourable interest rate than the market and with a time-limited deferment of capital repayments thus meeting the requirements for matched funding the *emda* grant. Through agreed development plans with each local authority, the cricket club has committed to delivering annual community benefits programmes in each area. Over a 15 year period, this will result in total benefits of approximately £1.23m on a net present value basis.

2.2.2 Description of the Redevelopment

The project comprised:

- Demolition of the old West Wing and Parr stands and replacement with a brand new stand. Maintenance of the old stands was costing Trent Bridge circa £70,000 per annum.
- Installation of permanent floodlights. It was felt that this element in particular would give Trent Bridge a competitive edge over other domestic venues in terms of bidding for future events such as International Twenty20 competitions and World Cup matches.
- Installation of a new permanent replay screen as part of a new office administration block.
- Increase in the ground capacity to over 17,000 (from 15,358).

The main project costs were: the New Stand (£6m), floodlighting (£600k), an additional replay screen (£500k) and electrical work (£500k). The remaining £600k is accounted for by other miscellaneous extras associated with delivering the programme of works. NCCC estimate that £7m of the total cost was spent locally. The main building contractor was a local firm, Cleggs. The floodlighting providers, Abacus based Sutton in Ashfield, have since gone on to win contracts for Lord's and Oval. The Quantity Surveyor and architect services were also provided by local companies.

2.3 The Role of Redevelopment in Attracting the Twenty20 Tournament

emda is keen to understand the impact of the 2009 ICC World Twenty 20 tournament as this represents the first significant return to the region from its investment in Trent Bridge. It is clear to all stakeholders involved in the development, and has been confirmed by the ICC, that without the redevelopment work Trent Bridge would not have been awarded the right to stage Twenty20 Tournament matches in 2009.

In a press release issued on April 10 2008, NCCC Chief Executive Derek Brewer commented that the bid by Trent Bridge to co-host the ICC World Twenty 20 tournament would not have been successful without the support of *emda* and local authority partners for the ground redevelopment. He added that:

The economic benefits to the region will be incredible and we are delighted that our partners will see such an early pay-back for the faith they showed when investing in our ground developments.

Jeff Moore, *emda* Chief Executive, added that:

emda invested in the redevelopment of Trent Bridge to help the ground maintain and grow its status as a world-class venue for cricket and other sports. The World Twenty20 is the first return on our investment.... The competition brings not only world-class athletes to the region but also press

and visitors from all over the world. emda was able to provide a significant financial contribution to enable Trent Bridge to win their bid and that is in recognition of the extremely high profile of the event, and the associated spend it will generate in the local economy.

This study assesses the scale of these economic impacts and, in doing so, measures the degree of early payback on *emda's* investment.

3 QUANTIFYING THE ECONOMIC IMPACT OF THE 2009 ICC WORLD TWENTY20 TOURNAMENT

3.1 The ICC World Twenty20 Tournament

The ICC World Twenty20 Tournament is organised by the International Cricket Council (ICC). The tournament involves 12 teams. All ten Test Match playing nations (Australia, Bangladesh, England, India, New Zealand, Pakistan, South Africa, Sri Lanka, West Indies and Zimbabwe) qualify for the tournament, with the remaining two places filled by ICC associate member nations through a qualification tournament.

The first Twenty20 Tournament was staged in 2007 in South Africa. The tournament was won by India, who defeated Pakistan by 5 runs in the final. The recent 2009 tournament, staged in England from 5-21 June, was won by Pakistan who defeated Sri Lanka by 8 wickets in the final at Lord's. Ireland and the Netherlands qualified for the 2009 tournament through the associate members qualifying tournament in Northern Ireland. Due to Zimbabwe's withdrawal from the tournament, Scotland was also invited to participate.

The tournament format has been the same in both 2007 and 2009, and has consisted of three stages:

- **Group Stage** - Four groups of three teams (two seeds and one qualifier) with two games per team and the top two teams qualifying for the Super 8s.
- **"Super 8s"** - Two four-team groups playing three games each. The make-up of the groups was pre-decided on the assumption that all seeds qualified; if a seed failed to qualify the beneficiary took their allotted place in their respective group.
- **Knock-out** - Two group winners from the Super 8s stage play the runner up of the other group in the semi-finals, to determine the participants in the final match.

The 2009 men's tournament was co-hosted by three English grounds: Lord's, the Oval and Trent Bridge. The women's tournament group matches were staged at Taunton. Trent Bridge hosted 11 tournament fixtures, including a men's and a women's semi-final on Thursday 18th June. Matches were staged on six different dates, with two games per day, except for the opening fixture between India and Bangladesh on Saturday 6th June.

3.2 Sources of Economic Impact

The principal economic impact of the Twenty20 Tournament was to attract visitors – including the teams, spectators and the world's media – to Nottingham and the East Midlands region. These visitors spent money in the local economy, on accommodation, food and drink, transport and other goods and services. The region also benefited from a proportion of ticket sales, providing match fees to NCCC and meeting the costs of other expenditures such as policing. These expenditures in turn supported employment and incomes among those hosting the event, and among supplier businesses. Multiplier effects occur as a result of supplier and employee expenditure in the local and regional economies.

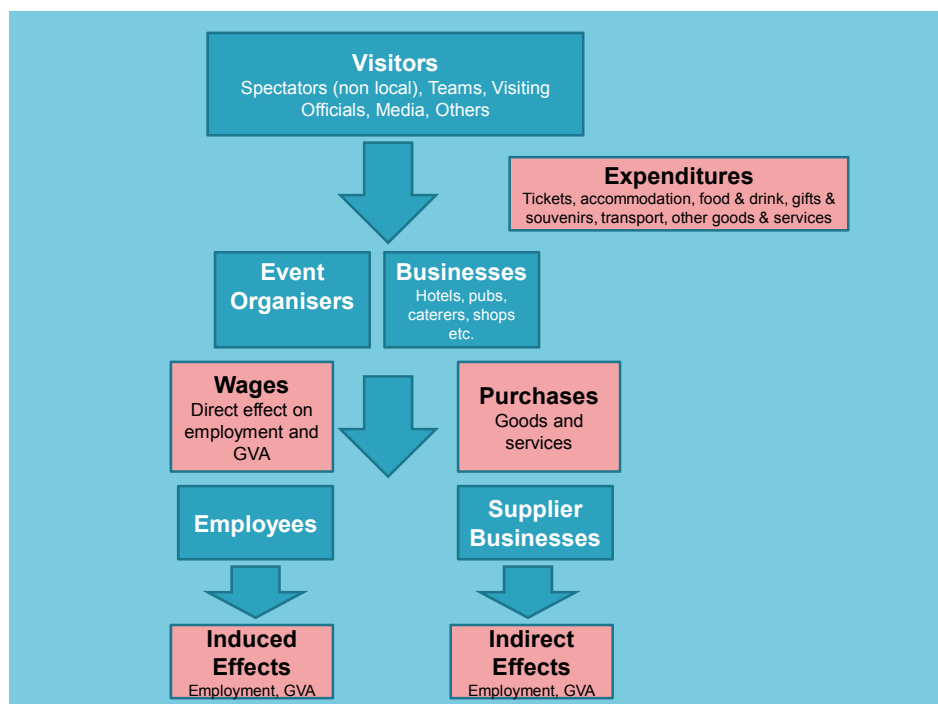
The event also attracted additional commercial income through sponsorship, advertising, TV rights, and other sources, although given the international nature of the event, only a small proportion of these benefited the East Midlands. In addition, there may have been wider but less tangible benefits to the region as a result of the increased profile for Trent Bridge, Nottingham and the East Midlands. These "place marketing" benefits depend on marketing and promotional activities linked to the event and are difficult to quantify, but could help to attract further investment and visitors in future.

The size of economic impacts depends on:

- The **numbers of visitors** – including spectators, teams and support staff, media and others;
- The **origin of these visitors** – since only those from outside the region brought additional expenditure to the East Midlands economy;
- The proportion of **visitors staying in the region** – since spectators, teams and media staying in the region spent more money than those making day-trips from elsewhere. It was therefore important to identify where visiting teams and media based themselves, and in particular the number of nights spent in the East Midlands compared to London, which had two of the tournament’s three host grounds.
- **Visitor and tournament expenditures** – and in particular the levels of expenditure and the degree to which organisers and participants engaged local and regional suppliers;
- **Economic multipliers** – and in particular the strength of indirect and induced effects (supplier and income effects) resulting from direct expenditures.

We assess these impacts in Sections 4 and 5 of this report, identifying the numbers, locations, movements and expenditure patterns of the various actors in the tournament. An illustration of expected impacts is given in Figure 2.1.

Figure 2.1: Economic Impacts of the Tournament



3.3 Assessing Economic Impact

3.3.1 UK Sport Methodology

The study has been undertaken in accordance with methodology developed by UK Sport for measuring the economic impact of major sporting events. This is set out in the report *Measuring Success 2: the Economic Impact of Major Sports Events*, which presents an

overview of the findings from 16 economic impact studies of major sports events staged in the UK since 1997.

Measuring Success 2 defines economic impact as:

The net economic change in a host community that results from spending attributed to a sports event or facility.

It emphasises that only visitors to the host economy as a direct result of an event being staged are eligible for inclusion in the economic impact calculations. The expenditure by people resident in the host area is not included on the basis that they would spend money locally irrespective of whether an event is taking place. It also suggests that as a general rule it is the expenditure by visitors to an event which contributes the majority of any additional expenditure, rather than spending by the organisers of an event.

The report specifies 10 stages in the assessment of the economic impact of sporting events (Box 2.1).

Box 2.1: Ten Stage Economic Impact Assessment Methodology for Sporting Events

1. Quantify the proportion of respondents who live in the host city and those who are from elsewhere.
2. Group respondents by their role in the event, e.g. spectators, competitors, media, officials etc;
3. Establish basic characteristics of visitors e.g. where they live and composition of the party;
4. Determine the catchment area according to local, regional, national or international respondents;
5. Quantify the number of visitors staying overnight in the host city and the proportion of these making use of commercial accommodation;
6. Quantify how many nights those using commercial accommodation will stay in the host city and what this accommodation is costing per night;
7. Quantify for those staying overnight (commercially or otherwise) and day visitors, the daily spend in the host city on six standard expenditure categories;
8. Quantify what people have budgeted to spend in the host city and for how many people such expenditure is for;
9. Establish the proportion of people whose main reason for being in the host city is the event;
10. Determine if any spectators are combining their visit to an event with a holiday in order to estimate any wider economic impacts.

Source: UK Sport (2004) – *Measuring Success 2*

The UK Sport methodology excludes economic multiplier effects. It is argued that, as well as the practicality and uncertainty associated with applying economic multipliers, because they vary from one local economy to another, focusing on additional local expenditures provides a more consistent basis for comparison between events.

Additional local expenditure resulting from events previously evaluated using this methodology resulted in estimated economic impact ranging from £0.18m (attributable to the half-day IAAF Grand Prix Athletics in Sheffield in 1997) to £25.5 million (at the 2000 Flora London Marathon). The First Ashes Test in Birmingham in 1997 was estimated to bring additional expenditures of £5.06 million to the local economy. The full list of events and their estimated economic impact is detailed in Table 5.2 on Page 29 of this report.

While the majority of measured impacts refer to the recirculation of expenditure around the UK economy, international sporting events such as the London Marathon were found to enhance national GVA by attracting overseas visitors. The report recognises that local or regional organisers of an event may be more concerned with the number of visitors from

outside the local area or region in question. The report also recognises potential benefits of events for place marketing.

3.3.2 *The RDA Impact Evaluation Framework (IEF)*

The study methodology was also required to be compliant with the RDA Impact Evaluation Framework¹. This requires assessments of both the Additionality and Strategic Added Value associated with the impacts of RDA investments.

Additionality

Additionality analysis turns gross outputs into net outputs ('netting off') prior to calculation of economic impact (regional GVA). There are a number of components to an assessment of programme additionality. These include:

- **Deadweight** – the extent to which the projects and funded activities would have proceeded even in the absence of funding. For example, it is important to consider the likelihood of the Trent Bridge redevelopment proceeding, and of the right to host the tournament being won, in the absence of RDA support;
- **Displacement** – the extent to which the impact of the project has been offset by reductions in activity elsewhere in the economy. An example would be if the tournament has reduced the likelihood of other events taking place in Nottingham, or has attracted expenditures which would otherwise have benefited other regional businesses;
- **Substitution** – the extent to which the availability of funding causes the beneficiary to substitute one activity for another one. An example would be if NCCC might have invested in another development project in the absence of *emda* support;
- **Leakage** – the extent to which the intervention has benefited firms or individuals outside the 'region' or target group. It is clear that the beneficiary and the tournament are located within the region, so the main issue here is likely to be the degree of leakage of expenditures by teams and event organisers from the region, and the extent to which they benefit firms outside the East Midlands;
- **Economic Multiplier Effects** – the extent to which the economic benefits of funded activities have additional benefits through money being re-spent in the spatial area by firms and their employees. The two types of multipliers are supplier linkages, that is the impact of the purchases of local goods and services, and income multipliers, that is the impact of the expenditures of those receiving a wage as a result of the event.

These different aspects of additionality were assessed through careful examination of the resources deployed and targeted questioning of the partners, stakeholders, delivery agents and beneficiaries.

Strategic Added Value

Improving the region's economy requires the action of many agencies and partners. The IEF recognises this, noting that 'the impact of RDAs can only be fully understood if their contribution to wider outcomes is taken into account'. The concept of SAV was developed in recognition of the need to take account of the catalytic and influencing role of an RDA and its investment, which is not captured in the outputs of direct project support.

SAV can be assessed by applying the eight standard RDA "tests" which can help to recognise where SAV is being generated. These are where the activity:

¹ PA Consulting and SQW Ltd (2006) *Evaluating the Impact of England's Regional Development Agencies: Developing a Methodology and Evaluation Framework*. DTI Occasional Paper No. 2. <http://www.berr.gov.uk/files/file21900.pdf>

- I. Creates confidence in prospects for regional growth
- II. Provides strategic leadership (of regional partners and stakeholders)
- III. Exerts a strategic influence (over key partners and stakeholders)
- IV. Levers in investment from other sources
- V. Develops synergy (in activity of RDA partners, stakeholders and target audiences)
- VI. Stimulates a scaling up of beneficial activity
- VII. Enhances the quality of a desirable regional activity
- VIII. Encourages engagement in the regional strategy.

In this study, assessment of SAV was based on interviews with stakeholders, taking account of the diverse views and interests of respondents. It included both semi-structured interviewing of stakeholders and the translation of different categories of SAV into a series of statements on a single page. A simple 'agree strongly' ...'disagree strongly' scoring of responses to these statements allowed a further systematic, quantitative, assessment of SAV based on stakeholder interviews.

3.3.3 Combining UK Sport and IEF Methodologies

The research methodology was based on a combination of UK Sport methodology and the RDA impact evaluation framework, and was designed to be consistent with the requirements of both.

It involved applying the UK Sport Methodology, and the ten stages within it – to estimate the additional expenditures in Nottingham attributable to the event.

Additionally, to be IEF compliant, the study went beyond these requirements to further assess:

- The additional expenditures the tournament brought to the East Midlands region
- The economic impacts of these expenditures, in terms of employment and GVA
- The additionality of these impacts, taking account of deadweight, displacement, substitution, leakage and economic multiplier effects in a structured way
- The Strategic Added Value (SAV) associated with the RDA's intervention.

The next section provides details of the expenditures and revenues associated with staging the tournament at Trent Bridge. The impact of these on the regional economy is estimated in section 5, including the direct impact of the construction work at Trent Bridge, while section 6 examines the implications with regard to the evaluation of the Trent Bridge redevelopment, including the Strategic Added Value of emda's involvement.

4 MEASURING TOURNAMENT EXPENDITURES AND REVENUES

4.1 Understanding Expenditures: Numbers and Origin

In accordance with the UK Sport Methodology, the additional expenditures brought to the city of Nottingham and the East Midlands region can be assessed by estimating:

- The number of visitors originating from outside Nottingham and the East Midlands who were attracted to the city and region by the tournament, taking account of all relevant groups of visitors (spectators, teams, media, officials);
- The average expenditures of each of these groups during their visit to Nottingham and the East Midlands.

Expenditures occurred both inside the ground (on food, drink and merchandise) and in the wider economy (on accommodation, food and drink, transport, and other goods and services). In addition, NCCC received fees for staging the tournament under its contract with the ECB.

For expenditures outside Trent Bridge, the methodology focused on estimating expenditures by interviewing different types of visitors (the “demand side”). This was more practicable than attempting to estimate additional revenues to different businesses in the city and region (the “supply side”). This would be problematic given the dispersed nature of spending by visitors in shops, pubs, cafes, restaurants and hotels; in addition, the businesses would probably find it difficult to estimate the degree to which any changes in revenue were attributable to the tournament.

As well as estimating visitor expenditures, the study has also collected and analysed data from Nottinghamshire CCC and the ICC on expenditures, revenues and employment associated with staging the event. Where available this provides superior and more direct estimates of expenditures and their impacts on employment and GVA than can be obtained by interviewing visitors.

Since the analysis combines demand and supply side data, care needs to be taken in avoiding double counting of impacts. Visitor expenditures on tickets and goods purchased inside Trent Bridge provide revenues for the event organisers, which is then re-spent on other goods and services. For example, the money spent by visitors on food and drink inside the ground provides revenues for caterers which support incomes and employment. The analysis recognises that these expenditures and revenues are two sides of the same coin, combining data collected from visitors and event organisers where appropriate to assess impacts, but avoiding double counting.

4.2 Analysis of data

Our analysis is presented in two sections. Firstly we provide an analysis of visitor expenditures, and then we examine expenditures and revenues involved in the operation of the event.

1. **Analysis of Visitor Expenditures:** Expenditures by spectators; teams, match officials; the media; and those involved in corporate hospitality are all examined, quantified and presented. This economic impact of these groups on the region throughout the tournament is significant.
2. **Operational Expenditures and Revenues:** the tournament funding model, which allows Trent Bridge to claim back tournament organisation costs means that much of this expenditure is additional income for the region. Spending on stewarding, marketing,

catering and cleaning, tournament administration and the employment, wages and profits involved are all considered.

4.3 Analysis of Expenditures

4.3.1 Spectator Expenditure

Expenditures by visitors include:

- Purchases of tickets – which provide revenues for the organisers of the tournament – notably the ICC and ECB, and through them NCCC;
- Purchases of goods and services inside the ground, on the day of the visit, particularly on food, drink and merchandise. These provide revenues for traders. For food and drink, a proportion of these revenues is shared with NCCC. In the case of merchandise, the revenue generated is taken by the ICC;
- Purchases of goods and services outside the ground in the wider Nottingham and East Midlands economy, on accommodation, food and drink, transport, gifts, souvenirs and other items, which provide revenues for other businesses in the tourism and retail sectors.

Purchased Goods and Services

In order to gather information about visiting patterns and visitor expenditures, GHK completed a survey of spectators at Trent Bridge during the tournament. Fieldwork took place on 5 dates, covering 10 of the 11 matches to take place at Trent Bridge. In all, 432 interviews were completed, through a total of 12 person days of fieldwork. Because interviewees were asked questions about the visiting patterns and expenditures of their whole party, the interviews gathered information about the visits of a total of 1776 spectators, an average party size of 4.1.

A full summary of the findings of this survey is provided in Annex 1, and a copy of the survey instrument is given in Annex 2.

The survey findings were used to estimate the additional expenditures both inside and outside Trent Bridge by spectators from Nottingham, elsewhere in the East Midlands, elsewhere in the UK and overseas, that could be attributed to the tournament (Table 4.1).

Table 4.1: Estimated Regional Expenditures per Spectator Attributable to the Tournament

Spectator Origin	£/spectator	
	Inside Trent Bridge	Outside Trent Bridge
Nottingham	£15.88	£2.11
East Midlands	£19.00	£7.51
Elsewhere in UK	£26.93	£30.51
Overseas	£22.77	£143.71
All	£23.87	£30.51

Source: Adapted from GHK Spectator Survey

According to UK Sport methodology and accepted practice in economic impact assessment, only expenditures by spectators from outside Nottingham and the East Midlands should be regarded as bringing additional revenues to these economies.

It is estimated that UK spectators from outside the East Midlands region spent an average of £26.93 per person inside the ground and £30.51 in the region but outside the ground as a result of their visit to the ICC World Twenty 20 tournament. Overseas visitors spent an average of £22.77 inside the ground and £143.71 outside the ground as a result of their

visit to the tournament. The much higher figure for overseas visitors reflects the fact that all stayed overnight, with many spending several days in the region,

The estimated attributable average spending per visitor for each group can be combined with estimates of the total number of spectators at the tournament to estimate total additional visitor spending.

Data on ticket sales is given in Table 4.2.

Table 4.2: Ticket Sales for ICC World Twenty20 Tournament at Trent Bridge

Actual Ticket Sales by Region								
	1st June	2nd June	6th June	8th June	10th June	11th June	16th June	18th June
East Midlands	1,349	1,060	3,748	4,690	4,367	6,584	4,151	4,200
East of England	123	52	950	524	1,128	1,028	601	850
London	86	4	1,633	880	774	272	1,250	1,138
North East	2	8	54	95	52	100	106	89
North West	164	31	629	249	647	468	1,020	651
South East	175	14	3,042	1,233	2,374	616	2,430	1,883
South West	1	12	365	123	474	313	119	182
West Midlands	352	39	1,972	658	1,509	1,060	1,553	1,310
Yorkshire and Humber	192	80	760	453	362	993	558	796
Scotland	22	13	105	81	53	80	139	127
Northern Ireland	0	0	6	189	167	290	480	763
Wales	4	0	126	96	58	49	111	45
Overseas	17	17	111	836	710	290	480	763
Allocated to Boards and Event Sponsors	1,832	1,163	2,142	2,034	2,348	2,260	2,944	3,108
Total	4,319	2,493	15,643	12,141	15,023	14,403	15,942	15,905

% Ticket Sales by Region								
	1st June	2nd June	6th June	8th June	10th June	11th June	16th June	18th June
East Midlands	31	43	24	39	29	46	26	26
East of England	3	2	6	4	8	7	4	5
London	2	0	10	7	5	2	8	7
North East	0	0	0	1	0	1	1	1
North West	4	1	4	2	4	3	6	4
South East	4	1	19	10	16	4	15	12
South West	0	0	2	1	3	2	1	1
West Midlands	8	2	13	5	10	7	10	8
Yorkshire and Humber	4	3	5	4	2	7	4	5
Scotland	1	1	1	1	0	1	1	1
Northern Ireland	0	0	0	2	1	2	3	5
Wales	0	0	1	1	0	0	1	0
Overseas	0	1	1	7	5	2	3	5
Allocated to Boards and Event Sponsors	42	47	14	17	16	16	18	20
Total	100	100	100	100	100	100	100	100

Source: Adapted from ICC Ticket Sales Database

The figures indicate that Trent Bridge received 95,000 visitors during the tournament and in the warm up matches (rounded down to allow for no-shows). The data above suggest that 31% of tickets were sold to spectators in the East Midlands, 47% to spectators elsewhere in the UK, and 3% to overseas spectators, while 19% were allocated to Boards and Event Sponsors. The above figures do not indicate the numbers of tickets sold to Nottingham-

based spectators, and, because of the number of tickets issued to Boards and Sponsors; do not allow a precise breakdown of spectators by origin.

However, the GHK spectator survey estimated that 11.1% of spectators originated from Nottingham, 19.5% from elsewhere in the East Midlands, 62.6% from elsewhere in the UK, and 6.8% from overseas. This indicates that a relatively large proportion of tickets allocated to Boards and Sponsors were issued to visitors from elsewhere in the UK and overseas. Assuming this is representative of all visitors to the tournament, and applying to the estimated total attendance of 95,000, gives an estimated number of spectators as follows (Table 4.3).

Table 4.3: Estimated Number of Spectators, by Origin

Origin	Estimated Number of Spectators	%
Nottingham	10,545	11.1%
East Midlands	18,525	19.5%
Rest of UK	59,470	62.6%
Overseas	6,460	6.8%
Total	95,000	100.0%

Source: Adapted from GHK Spectator Survey

Combining the estimated numbers of spectators and average attributable expenditures for each, the total expenditure by each of these groups is estimated in Table 4.4.

Table 4.4: Estimated Expenditures by Spectators

Origin of Visitors	Estimated Expenditures Attributable to Tournament:			
	£/person		£ total	
	Inside Trent Bridge	Outside Trent Bridge	Inside Trent Bridge	Outside Trent Bridge
Nottingham	£15.88	£2.11	£167,455	£22,250
East Midlands	£19.00	£7.51	£351,975	£139,123
Rest of UK	£26.93	£30.51	£1,601,527	£1,814,430
Overseas	£22.77	£143.71	£147,094	£928,367
Total			£2,268,051	£2,904,169
Of which:				
Additional to Nottingham			£2,100,596	£2,881,919
Additional to East Midlands			£1,748,621	£2,742,796

Source: Adapted from GHK Spectator Survey

In all we estimate that expenditures by spectators attributable to the tournament totalled £2.3 million inside Trent Bridge, and £2.9 million in the wider East Midlands region. Removing expenditures by residents of Nottingham, we estimate that the tournament brought additional expenditures of £5.0 million to the city, of which £2.1 million was spent inside the ground and £2.9 million outside it. The net expenditures brought into the East Midlands region are estimated at £4.5 million, of which £1.75 million was spent inside the ground and £2.75 million outside it.

Ticketing Expenditures

Total expenditure by spectators on tickets for matches at Trent Bridge is estimated at £3.1 million, based on ticket sales of 78,000 at a weighted average price of £40.

However, ticketing was organised centrally by the ECB, and did not provide direct income to the region. Instead, under its contract with the ECB, NCCC received match fees and a

share of ticketing revenues, and made payments back to the ECB for the right to stage the tournament. The details of these payments are commercially confidential.

4.3.2 Team Expenditure

Eleven teams stayed in the East Midlands during the group stages of the ICC World Twenty20 tournament (Table 4.5). The longest stay was by Bangladesh, for 10 days between 31 May and 9 June. Each team comprised a party of between 28 and 35 persons, including players, coaches and drivers. In all, these 11 teams spent a total of 1,788 person nights in the region. The Super 8s and semi final stages (including the women’s semi-final) involved a further 705 person nights in the region. In total, therefore, teams stayed a total of 2493 person nights in the East Midlands over the course of the tournament.

Table 4.5: Nights Spent in the East Midlands by Teams during the T20 Group Stages

	May				June												
	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Australia																	
Bangladesh																	
England																	
India																	
Ireland																	
New Zealand																	
Pakistan																	
Scotland																	
South Africa																	
Sri Lanka																	
West Indies																	

Source: GHK analysis of data provided by Gulliver’s Travels

Accommodation was booked centrally through Gulliver’s Travel. Total expenditures in the region on hotel accommodation (including breakfasts), meeting rooms and laundry amounted to £222,566 (Table 4.6).

Table 4.6: Breakdown of Team Accommodation Costs

	Number of Hotel Rooms Occupied	No. of nights spent by teams in East Midlands	Hotel services (Laundry and Meeting Rooms)	Total cost of accommodation (£)
Warm-Up and Group Stage				
Australia	33	7	Laundry & Meeting Room	18,203
Bangladesh	28	10	Laundry	26,226
England	35	6	Laundry & Meeting Room	25,573
India	31	7	Laundry & Meeting Room	20,651
Ireland	31	8	None	23,240
New Zealand	32	2	Laundry	6,324
Pakistan	30	2	Laundry & Meeting Room	5,394
Scotland	30	2	Laundry & Meeting Room	5,647
South Africa	29	4	None	13,885
Sri Lanka	31	6	None	29,984
West Indies	29	4	None	10,497
Super 8 and Semi Final Accommodation	183	2 or 3	Laundry & Meeting Room	25,482
Women’s Tournament Accommodation	124	2	Laundry and Meeting Rooms	11,460
Total				222,566

Source: GHK analysis of data provided by Gulliver’s Travels

NB: Cost of Accommodation is calculated based on specific hotel and room type used

In addition, players received an allowance of £70 each per day to cover additional expenses for food, drinks and other items. Discussions with the ICC Teams Co-ordinator suggest that players do not spend all of their allowances, and that, an average expenditure of around £35 per player per day can be expected. On this basis, it is estimated that players spent an additional £87,255 from their allowances over the 2493 nights spent in the region.

Expenditures by the teams are therefore estimated to total £310,000 in the region over the tournament as a whole.

Table 4.7: Expenditures by Teams

Type of Expenditure	Total Expenditure
Accommodation	£222,566
Player expenses	£87,255
Total	£309,821

4.3.3 Broadcast Media Expenditure

The Host Broadcaster and Audio Visual Rights Holder for the tournament was ESPN STAR Sports (ESS). ESS operates by distributing the rights it owns through a series of licensees (territory specific rights holding broadcasters) as part of the deal with the ICC. ESS licensees promoted coverage of the tournament from thirty days prior to commencement and on each match day up to, and including, the final day. This was done via at least three thirty second trailer promotions per day.

ESS produced live coverage at all three tournament grounds. The tournament commanded extensive media coverage with live feeds to world-wide audiences. In relation to this study media expenditure is evident through accommodation costs of ESS and their licensees and the IMG licensed broadcaster and other broadcasters present at the venue. These expenditures are estimated in Table 4.8

Table 4.8: Accommodation Costs for Broadcasting Crews

Broadcaster	Status	Crew No.	Estimated Nights in Region	Estimated Accommodation Spend* (£)
ESS	Host Broadcaster	30	360	£32,400
Sky	UK broadcast partner	15	180	£16,200
BBC	UK highlights partner/UK radio rights holder	20	240	£21,600
Other radio	Non UK rights holders	10	120	£10,800
Other TV	Non UK rights holders	20	240	£21,600
Total		95	1140	£102,600

Source: GHK analysis of data provided by Gulliver's Travels and ICC Media Liaison Officer

*Based on accommodation costs of £90 per head.

Table 4.8 outlines estimated revenues generated in the region from broadcasting crew accommodation costs. The crew numbers are approximate staffing levels for each broadcaster over the course of the tournament. It is likely that media crews covering Trent Bridge matches spent a minimum of 6 nights in the region (the number of competitive match days) and a maximum of 18 (the duration of the tournament at Trent Bridge, from the first warm up game to the semi-final day). Taking a mid-point of 12 gives an estimated total of 1140 bed-nights spent by media crews in the region. Assuming an average expenditure of £90 per night on accommodation gives estimated expenditures on accommodation of £102,600.

In addition to this, host broadcasters arranged accommodation in the East Midlands for front of camera staff through the ICC-approved travel agent Gulliver's Travels. We therefore have exact accommodation costs for this group. The costs are presented in Table 4.9.

Table 4.9: East Midlands Host Broadcaster Accommodation Costs

	Total no. of nights spent in East Midlands	Cost of accommodation (£)
Media	247	19,658
Total	247	19,658

Source: GHK analysis of data provided by Gulliver's Travels

If each visiting member of the media is assumed to spend an additional £35 per night on food, drink and other expenses (similar to expenditures by teams), this gives estimated additional expenditures of £48,545. We consider this to be a conservative estimate of media personnel spend per day, but reasonable in the absence of any validated evidence suggesting variance. On this basis total expenditures in the region by the broadcast media is estimated at £170,803 (Table 4.10).

Table 4.10: Estimated Regional Spending by Broadcast Media

Item	Amount
Accommodation	£122,258
Other Expenses	£48,545
Total	£170,803

Source: GHK analysis of data provided by Gulliver's Travels

4.3.4 Other Media Expenditure

In addition to ESS rights holders, a range of other media were present at the event. The global reach of the tournament is demonstrated by the fact that there were media representatives from all over the world. Data analysis from media accreditations is presented in Table 4.11.

Table 4.11: Number of Accredited Media Attending Trent Bridge per Match Day

Media Origin	Number	% of Total
International	84	78
National	22	20
Regional	2	2
Total	108	100

Source: GHK Analysis of data received from the ICC Media Liaison Officer

International media representatives came from a range of countries, including the United States of America, the United Arab Emirates, South Africa, India, Pakistan, Bangladesh and the Caribbean. This illustrates that the vast majority of accredited media representatives were from overseas or UK national media. It is logical to assume that these media representatives covered the entire tournament, splitting their time between the three tournament venues.

We have estimated accommodation expenditures on the assumption that national and international media attendees stayed in the East Midlands for one third of the duration of the tournament, spending £90 per night on accommodation and £35 per night on other expenses (in line with allocated expenditure for Teams, Match officials and Accredited Media). This provides an estimate of accommodation expenditure of £73,140 for the region, and other expenses of £28,443. On this basis total expenditure in the region by accredited non-ICC partner media is estimated at £101,583 (Table 4.12).

Table 4.12: Estimated Regional Spending by Broadcast Media

Item	Expenditure attributed to East Midlands
Accommodation	£73,140
Other Expenses	£28,443
Total	£101,583

Source: GHK analysis of data provided by Gulliver's Travels

4.3.5 Match Officials, ECB Officials and Tournament Administrators

According to data received from Gulliver's Travels, Match Officials and Match Official Liaison Staff spent a total of 112 bed nights in the East Midlands region, involving total expenditure of £10,456.

Table 4.13: Match Officials and Liaison Staff: East Midlands Bed Nights

	May				June																	
	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Match Officials				2	2	2	6	6	6	6	6	6	6	9	4	1		4	6	6	1	
Match Official Liaison Staff					2	2	2	2	2	2	2	2	2	3	2	1	1	2	2	2	2	2

Source: GHK analysis of data provided by Gulliver's Travels

Table 4.14: Accommodation Costs for Match Officials and Liaison Staff

	Total no. of nights spent in East Midlands	Cost of accommodation (£)
Match Officials	79	7,477
Match Official Liaison Staff	33	3,069
Total	112	10,546

Source: GHK analysis of data provided by Gulliver's Travels

Officials received a daily expenses allowance of £50, and, like the players, are estimated to have spent an average of £35 per day, which amounts to £3,920 over the course of the tournament. Total expenditures by Match Officials and Liaison Staff in the region are therefore estimated at £14,376 over the course of the tournament.

Table 4.15: Total Expenditures: Match Officials and Liaison Staff

<i>Item</i>	<i>Expenditure</i>
Accommodation	£10,456
Expenses	£3920
Total	£14,376

Source: GHK analysis of data provided by Gulliver's Travels

4.3.6 Corporate Hospitality Guests

Three categories of ICC Partners were considered corporate guests for the Twenty20 Tournament:

- Global Sponsors: Reliance Communications; Pepsi; LG; Hero Honda
- Official Partners: Emirates, Yahoo, Reebok, Ultra Tec Cement
- Local Partner: Standard Bank

Three of these partners were T20 Tournament Specific (Hero Honda, Ultra Tec Cement and Standard Bank) and the other partners have an established relationship with the ICC. As partners they each receive match tickets from the ICC tournament allocation. Global sponsors receive 100 tickets, official and local sponsors each receive 50 tickets. All partners pay the venue a fee for each corporate guest. This ranges from £65-100 per head per day, but is charged at cost. Therefore, though revenues support wage costs as well as other expenses, there is no profit for the host venues from corporate packages for these guests. Host venues are, however, able to generate further revenues from ICC hospitality guests through beverage sales

As part of the staging agreement between Trent Bridge and the ICC, ICC Sponsors were allocated 250 seats in the hospitality sections at Trent Bridge. This allowed Trent Bridge to market 288 hospitality packages to corporate customers. In addition the staging agreement with the ICC also meant that Trent Bridge could not make as much profit from sales as is normal for One Day International or Test Matches. Standard arrangements for Test and ODI matches with the ECB allow Trent Bridge to discount tickets and programmes in the corporate package, resulting in profit of 60% on sales. However for the Twenty20 Tournament the ICC did not allow any discounting of tickets or programmes, this resulted in a reduced profit margin of 40% on hospitality package sales.

Table 4.16, overleaf presents the results of the hospitality sales analysis.

Table 4.16: Trent Bridge Income from Hospitality Sales

	ICC Guests and Sponsors	Trent Bridge Sales	Total Hospitality Spectators	Revenue Generated (£)
06-Jul-09	171	240	411	20,878
08-Jul-09	147	144	291	17,820
10-Jul-09	160	250	410	33,930
11-Jul-09	161	278	439	53,200
16-Jul-09	264	258	522	49,930
18-Jul-09	249	279	528	74,350
Total	1,152	1,449	2,601	250,108
Income from ICC Hospitality (£)				89,000
Total Income (£)				339,108
Costs (£)				(203,465)
Profit (£)				135,643

Source: Trent Bridge Hospitality Sales Data

Total revenues from hospitality amounted to £339,108. Based on discussion with staff at Trent Bridge, we assume that all expenditures for ICC guests originate from outside the region, and 70% of other hospitality expenditures are made by visitors from outside the East Midlands. We therefore calculate additional expenditures in the region at £264,000. Expenditure originating from outside Nottingham is estimated at £301,000.

The figures suggest that each £1 of revenue supports additional GVA of approximately £0.70. On this basis, the additional direct contribution to GVA is estimated at £185,000.

4.4 Revenues, Expenditures and Employment in Organisation of the Event

4.4.1 Overview

The ICC World Twenty20 tournament in the region was jointly organised by:

- The ICC – as cricket’s world governing body with overall ownership of the World Twenty 20 tournament;
- The ECB – which successfully bid to host the 2009 tournament in England;
- Nottinghamshire CCC – which successfully bid to the ECB to co-host tournament matches, and was directly responsible for the organisation of the matches staged at Trent Bridge.

Ticketing revenues from the event were shared by the ECB, other ICC member organisations, and the ICC itself. NCCC contracted with ECB to stage matches at Trent Bridge.

The ICC received sponsorship income from the event’s Corporate Partners (listed in section 4.2.5). Global TV rights were held by ESPN Star Sports, the ICC’s global media and production partner for its audio-visual rights for ICC Events from late 2007 to 2015.

As part of its contract with the ECB, NCCC had the rights to revenues from catering, hospitality and parking. Merchandising was organised separately by the ECB.

4.4.2 **Operational Expenditures**

Expenditures in the operation of the event comprised a combination of:

- Central expenditures, made from an overall Event Budget – covering the expenses of teams, match officials, tournament marketing, ground provision, policing and security for teams and officials.
- Local expenditures – incurred by NCCC in hosting matches at Trent Bridge, including event administration, stewarding/visitor management, security, cleaning, utilities and local marketing.

Further revenues and expenditures were involved in the provision of goods and services to spectators inside the ground – i.e. in the operation of catering and hospitality services, bars and merchandising outlets. These relate directly to estimates of spectator expenditures in the ground (Section 4.3) and should not be double counted; however, the supply side analysis provides additional data on employment and GVA associated with service provision.

This section describes and quantifies the expenditures in hosting the event which arose within the East Midlands region, other than those relating to the servicing of teams and media, which are dealt with above.

4.4.3 **Event Organisation**

Administration

Administration of the tournament at each venue was coordinated by the ICC Events Team. Three temporary posts were established to deliver the event at each venue. These posts were:

- The Venue Manager had overall responsibility for all aspects of venue preparation and event delivery. This involved a substantial amount of work in the build up to the tournament in order to ensure that the venue met ICC requirements. In the case of Trent Bridge this role was filled by the secondment of NCCC's Deputy Chief Executive.
- The Media Liaison Manager was responsible for all aspects of liaison with the media before and during the tournament. Due to the global scale of the coverage this was essential in order to satisfy ICC media partner requirements. At Trent Bridge this role was filled by the secondment of NCCC's Media and Communications Manager.
- As part of the ICC tournament security policy, the Venue Accreditation Manager was responsible for ensuring that all players, officials, ground staff, media and other staff operating at the venue had their identity verified prior to entering the venue. All visitors were issued with a photo ID. This role was a temporary post which was paid for by the tournament budget.

In addition a range of temporary posts were created by NCCC on-site to provide match-day services. These posts were required as part of the staging agreement between the ICC and host venues. Additional operational staff included: dressing room attendants (supplementing existing match-day attendants); ticketing staff; hospitality hosts and replay and scoreboard operators. The total cost of this support was £13,250, which created an additional 72 person days of employment on-site during the tournament.

There were also a range of operational and commercial staff who, whilst not formally part of the ICC team delivering the event, were integral to ensuring its success. The fact that there was no Test Match at Trent Bridge in 2009 meant that the NCCC were likely to make a significant loss this year, which may have resulted in future job losses. The Twenty20 Tournament ensured that this was not the case.

The tournament has not only been useful in safeguarding employment at Trent Bridge but it has also provided operational and commercial staff with experience of delivering a global event. This has provided NCCC with a competitive advantage which, given the increasing number of venues trying to attract Test and ODI matches, will be important. Furthermore the legacy of the partnership between Rushcliffe Borough, Nottingham City and Nottinghamshire County Councils, Trent Bridge and *emda* has established a highly effective delivery mechanism in the region which could play a significant role in attracting future events to the region. An early indication of this evident in the current partnership discussions regarding how impact from the 2012 Olympic Games and Paralympic Games can be maximised in the region

Through the secondment arrangements and resulting salary savings the administration of the tournament did result in a small profit for Trent Bridge. However due to the demands on other staff at the club in ensuring that the event was delivered effectively a number of days in lieu were built up. NCCC is in the process of buying back these days from staff using surplus salary from the secondment arrangements. The administration of the tournament is therefore considered to have been cost neutral in terms of its impact on salaries of existing staff at Trent Bridge.

Based on our understanding of the preparation and execution of the event at Trent Bridge we believe there would have been up to fifteen members of staff working on the build up and delivery of the tournament at Trent Bridge, probably equating to some two months per person. This would result in 30 months, or 2.5 years of person work. Taken together with the additional operational staff we estimate additional employment at Trent Bridge attributable to the tournament to be 33.6 months, some 2.8 years, involving additional staff costs in the region of £108,000.

Ground Facilities

Nottinghamshire CCC received a basic fee of £10,000 per match day for staging tournament fixtures. This amounted to £60,000 for the tournament as a whole and can be seen as a contribution to the cost of providing the pitch and facilities for the tournament.

Preparation of Trent Bridge for the tournament involved a range of other costs which relate to the preparation of Trent Bridge prior to the tournament. All of these costs are paid for out of the tournament budget and should be considered as additional income to the region. They include:

- Construction of temporary changing rooms and shower facilities in the existing Trent Bridge Museum. These facilities were dismantled following the conclusion of T20 Tournament fixtures at Trent Bridge. Construction costs included: plumbing, electrical works, joiner services and costs of materials. The total cost of this work was £19,217, all of which was paid to local companies, with the exception of £3,000 paid for bathroom fixtures and fittings to a company in the South East. A range of additional installations and facilities to ensure the venue met ICC requirements. These included: IT installations at the Accreditation Centre; bespoke structures to block walkways within Trent Bridge; dance stage hire; hire of public conveniences; extra security camera installations; hire of drug testing facilities; additional CCTV facilities and installation. The total cost of this work was £84,000. £55,000 of this work was undertaken by companies in the region.
- Training facilities at Lady Bay were also upgraded for the tournament. This included hire of portakabins, temporary shower, toilet and drug testing units and hire of additional sidescreens and covers. NCCC calculate the total cost of this work to be £9,000.

In addition Stand-by Technical Support was deployed at Trent Bridge during the tournament, this included: floodlight engineers, wi-fi technical support, stand-by sound engineers, electricians, lift engineers, audio-visual support and remote computer systems support. This support is additional to existing Trent Bridge match day employees who were also deployed on match days. The total cost of this additional support was £18,000 over the tournament.

Staging the tournament also increased expenditures by Trent Bridge on utilities. However it is logistically impossible to distinguish between utilities costs directly attributable to the tournament matches and those required for the day-to-day running of the venue (office power costs etc). NCCC were however able to take electricity meter readings and distinguish power costs incurred through flood light use when this took place during the tournament. This resulted in £2,500, which NCCC were able to claim back at-cost as tournament expenditure. However this is not additional income for the region.

Other facilities related expenditure claimed back as tournament expenditure by NCCC related to signage and car parking facilities. Signage was purchased from the AA for a total cost of £2,000 and Rushcliffe Borough Council provided parking facilities at a cost of £6,000 at Bridge Field. Some income was derived from this, but this was negligible. Most of the parking was given as complementary to ICC, ECB and NCCC guests and staff. The additional revenues to the region from purchased signage and car parking hire is estimated to be £8,000.

Stewarding

The tournament format necessitated a high level of stewarding. During Test Match and One Day International fixtures it is normally possible to redeploy stewards from entrances and exits to the ground to more heavily populated seating areas once play has commenced. This results in a normal Test Match/ODI staffing level of 265 manning 240 positions around the ground.

However several factors made this impossible, including the double header format, visitors from a number of different countries, and significant spectator movement in and around the ground. A risk assessment resulted in the tournament being classified as a high risk event for Trent Bridge, necessitating a high level of stewarding with a large presence required in position on the gates for the majority of the day.

Prior to the tournament, Trent Bridge recruited and trained 69 additional stewards to cope with demand. They were trained at local colleges in NVQ Level 2 Health and Safety. The cost of the training was £1,500 per candidate. This cost was paid for by the Learning and Skills Council. Our understanding is that this money, if not used to fund training for Trent Bridge staff, would have been used to fund NVQ Level 2 training for another employer in the region. This training has therefore been a benefit to the region, but, having displaced other eligible activity, is not considered to have attracted additional income to the region for the purposes of this analysis.

The cost of stewarding for each match day was £25,000. This was for all 240 staff; an additional £5,000 per match day was required for First Aid and Fire Marshalls and £30,000 for 160 Specialist Stewards. These stewards were recruited by the ICC and were responsible for stewarding restricted areas such as player and media entrances and exits. This resulted in an expenditure of approximately £60,000 per match day.

Taken over the eight match-days at Trent Bridge this would equate to £480,000. However the number of stewards required for the warm-up games was approximately two-thirds of those for Group, Super 8 and Semi-Final matches. In addition the single-header game on 6 June only required half the steward time of other matches. Therefore we estimate the total cost of stewarding the tournament to be £409,200. In addition, the security and stewarding

required the hire of extra portable communication devices at a cost of £7,000, resulting in total stewarding costs of £416,200. This expenditure is considered tournament expenditure and is therefore additional revenue to the region.

These expenditures funded approximately 2,930 person days (approximately 12.8 person years) of work during the tournament.

Emergency Services

The bill for policing the event amounted to £193,000; this was met by the ICC and paid to Nottinghamshire Constabulary, providing additional revenue to the region. It is assumed that 90% of this fee is accounted for by staff costs, supporting 4.3 job years of work.

There were also additional tournament staging costs of £21,500 relating to employment of East-Midlands Ambulance staff, an on-site doctor for participating teams and first-aiders. As above, we assume that 90% of these fees are accounted for by staff costs, supporting additional employment of 6 person months

Cleaning and Waste Management

Cleaning services are provided to Trent Bridge by Ashforth Cleaning. Ashforth is based in Nottingham and operates throughout the East Midlands, providing services to commercial and private properties. Ashforth has provided services to Trent Bridge for over thirty years. A normal operational day for Ashforth at Trent Bridge involving a domestic fixture will result in approximately 5-10 members of staff on site at a cost of less than £300

For the tournament Ashforth required up to 100 personnel per match day. This necessitated recruitment of approximately fifty temporary members of staff. These staff members were all recruited specifically to deliver services for the tournament and their employment was time limited. They were all Nottinghamshire residents.

Total employment supported by the tournament is estimated at 650 person days of work, based on 100 person days of work for the 6 competitive match days and 25 each for the two warm up games. Each member of the team is understood to have worked for a full day on each match day. In addition the tournament safeguarded existing employment at Ashford which may have been lost in the absence of Trent Bridge staging matches in the region, although the exact number of posts involved is difficult to quantify.

The overall revenue generated by Ashforth from the tournament is approximately £100,000, which represents additional revenues for the region. Of this income, approximately £30,000 was spent on the purchase of supplies, of which it is assumed that 50% were sourced within the region. The remainder was paid in wages and taken out as profits. All employees and the owner of the company are resident in the East Midlands.

The cost of waste disposal, window cleaning and skip hire was also claimed back from the ICC as Tournament expenses. This resulted in additional revenue to the region of £54,000.

Local Marketing

The majority of the £500,000 tournament marketing budget was spent in London, using media production companies to manufacture materials and produce digital media output. A large programme of marketing activity took place in London. This involved promotional posters in overland mainline stations (Waterloo, St Pancras and Marylebone) and promotional posters on the London Underground at over 400 sites. There was a more intense marketing campaign of posters and digital displays at tube stations closest to Lord's and The Oval.

In Nottingham local marketing activity took the form of street dressing close to the mainline station and on the route from the station to Trent Bridge. The marketing campaign also built

on the strong local authority partnership in order to deliver cricket festivals at schools and affiliated clubs throughout Nottingham.

The cost of this activity was £60,000. It was paid for by the following contributions:

- The ECB - £10,000
- Nottinghamshire County Cricket Club - £10,000
- Experience Nottinghamshire - £30,000
- The local authorities - Rushcliffe Borough Council, Nottinghamshire County Council, each £5,000, Nottingham City Council provided advertising space free of charge.

The spend from this activity was supplemented by some local spending which came direct from the tournament marketing budget. This amounted to £50,000 which was spent on local radio advertising in Nottinghamshire and the wider East Midlands region.

Spending by the local partners cannot be considered additional to the region, as it is likely to have displaced other local expenditures. It is estimated that the tournament resulted in additional marketing expenditure of £60,000 in the region, which benefited local contractors.

4.4.4 Catering

Catering at Trent Bridge is provided through Lindley Catering. Kiosks supplying drinks and food (wet and dry products) were located around Trent Bridge during every match day throughout the tournament. In addition to directly supplying food and drink at the venue Lindley sub-contracted with another provider to ensure sufficient coverage around the ground.

Sales revenue of £851,000 was generated from Lindley and sub-contractor outlets during the tournament.

This figure does not include sales revenue taken by two public houses - the Larwood and Voce and Trent Bridge Inn - both of which have entrances and kiosks which spectators could access from inside the ground. It also excludes revenues from the Member's Bar at Trent Bridge.

Lindley and sub-contractors employed a total of 110 staff on a casual basis during the tournament. During a normal domestic fixture Lindleys would employ 30 staff on site. Therefore additional employment directly associated with the tournament amounts to 80 temporary posts. Employment costs for these additional staff are broken down as follows:

- Staff directly recruited and staff sourced through an agency: £73,000
- Additional Lindleys staff drafted in from other trading units: £59,000

Additional costs in transporting and providing accommodation for existing Lindleys staff to work at Trent Bridge were incurred, amounting to £6,000. These costs came off the profit made by Lindleys, but can be considered additional income for the region.

The total costs of sales were £168,000, and total revenue from sales was £851,000, therefore GVA generated was £683,000. Total employment from this activity amounts to some 960 person days. This averages employment on-site of seven hours per match day per person. Whilst all employees may not have worked seven hours an average of seven is reasonable taking into account pre and post match set up and clear up time.

Expenditure from the spectator survey suggest that total spending on food and drink inside the ground by visitors from outside Nottingham amounted to £1,785,000, of which £1,486,000 was additional to the East Midlands region. Extrapolation from the Lindleys figures suggests that the economic impacts of these expenditures was as follows (Table 4.17).

Table 4.17: Economic Impacts of Food and Drink Spending inside Trent Bridge

	Additional Impact for:	
	Nottingham	East Midlands
Expenditure	£1,785,507	£1,486,328
GVA	£1,428,405	£1,189,062
Employment (person days)	2014	1677
Employment (person years)	8.8	7.3
Purchased Goods and Services	£357,101	£297,266

4.4.5 **Merchandising**

As part of the tournament staging arrangement with the ICC, the ECB agreed to sign over all merchandising rights to the ICC at each tournament venue. On this basis the bid to stage the tournament submitted by NCCC agreed to this demand. Some discussions were held with the ICC regarding the possibility of NCCC selling merchandise alongside ICC/Twenty20 Tournament branded goods. However this was not allowed.

All income from merchandising therefore went directly to the ICC. In 2008, the ICC appointed Licensing in Motion - a joint venture between Velocity Brand Management (VBM) and Sports & Entertainment (SEL) - as its official licensing and merchandising partner to manage, develop and produce merchandise and memorabilia for the period to 2015. LIM is an international operation with a head office in Sydney and other offices in London and Delhi.

Those who worked on the stalls were part of a central team. It is possible but unlikely that some of these posts may have been filled by East Midlands residents. Those involved in merchandising may have spent a small amount of money in the region on accommodation and other expenses. The regional economic impact of expenditures on merchandise is therefore considered to be minimal.

5 ECONOMIC IMPACT OF ICC WORLD TWENTY 20 TOURNAMENT

5.1 Additional Expenditures in Nottingham and East Midlands

The ICC World Twenty20 tournament is estimated to have brought additional expenditures of £6.4 million to the city of Nottingham. This includes £2.7 million spent inside the Trent Bridge ground and £3.7 million in the wider city.

Table 5.1: Additional Expenditures in Nottingham

	Estimated Expenditures:		Total
	Inside Trent Bridge	Outside Trent Bridge	
Match fees ²	£60,000		£60,000
Spectators	£2,100,596	£2,881,919	£4,982,515
Teams		£309,821	£309,821
Media		£272,386	£272,386
Officials		£14,376	£14,376
Corporate Hospitality Income	£301,000		£301,000
<i>Tournament Expenditures met by ICC:</i>			
Tournament marketing		60,000	60,000
Administration	108,000		108,000
Ground Facilities	97,217	17,000	114,217
Emergency Services		214,500	214,500
Total	£2,666,813	£3,770,002	£6,436,815

This estimate of additional expenditure at the city level is based on the UK Sport methodology for assessing the economic impact of sporting events. It compares with estimates for previous events as follows (Table 5.2).

² This figure is for the basic match fees only. NCCC received further revenues from the ICC based on ticket sales for the tournament. However, these were offset by payments made as part of the contract to stage the event.

Table 5.2: Comparison of Additional Expenditures with Previous Studies using UK Sport Methodology

Year	Event	Days	Estimated Expenditure (£m)
1997	Ashes Test at Edgbaston	5	5.0
2000	Flora London Marathon	1	25.5
2000	Spar Europa Cup (Athletics) – Gateshead	2	1.0
2001	World Amateur Boxing, Belfast	8	1.5
2001	World Half Marathon, Bristol	1	0.6
2003	World Cup Triathlon, Manchester	1	1.7
2003	World Indoor Athletics, Birmingham	3	3.2
2003	England v S Africa Test Match, Trent Bridge	5	1.1
2005	Ashes Test Match, Headingley	5	2.6
2008	England vs S Africa, One day International, Headingley	1	0.8
2009	ICC World Twenty20 tournament, Trent Bridge	6	6.4

A proportion of this additional expenditure in Nottingham is by residents of the East Midlands. The estimated additional regional expenditure (i.e. spending in the East Midlands from visitors outside the region) is estimated at £5.9 million. Of this, £2.3 million was spent inside Trent Bridge and £3.6 million in the wider region.

Table 5.3: Additional Expenditures in the East Midlands

	Estimated Expenditures:		Total
	Inside Trent Bridge	Outside Trent Bridge	
Match fees	£60,000		£60,000
Spectators	£1,748,621	£2,742,796	£4,491,417
Teams		£309,821	£309,821
Media		£272,386	£272,386
Officials		£14,376	£14,376
Corporate hospitality income	£264,000		£264,000
<i>Tournament Expenditures met by ICC:</i>			
Tournament marketing		60,000	60,000
Administration	108,000		108,000
Ground Facilities	97,217	17,000	114,217
Emergency Services		214,500	214,500
Total	£2,277,838	£3,630,879	£5,908,717

5.2 Methodology for Assessing Economic Impacts

5.2.1 Overview

The study requires the net impact of the tournament on the East Midlands regional economy to be assessed, measuring the effects on:

- Employment – the number of jobs and part-jobs (expressed as full time equivalents, FTE) supported by event-related expenditures;
- Gross Value Added – the effect of these expenditures on the region's net output, comprising wages, salaries, profits and rents.

To estimate these impacts, the following approach has been taken:

- The impacts of on-site activity (both in terms of event organisation and service provision) have been estimated as far as possible with direct reference to data on employment, expenditures and revenues, supplemented where necessary with data from the spectator survey. Economic multipliers have been used to estimate the indirect and induced effects of purchases by the event organisers.
- The impacts of off-site expenditures have been assessed by applying appropriate economic multipliers to estimates of additional expenditure in the region.

5.2.2 *Economic Multipliers*

The impacts of expenditures on employment and GVA can be assessed by using standard multipliers. Data from a variety of sources (input output tables for SW England and Scotland, UK National Accounts Blue Book, Annual Business Inquiry and regional tourism studies) suggest the following multipliers and ratios are applicable at the regional level:

- 1 FTE job supported per £50,000 of tourism expenditure, taking account of direct, indirect and induced effects;
- £0.50 GVA per £1 business turnover;
- 1 direct FTE job per £90,000 business turnover across the economy as a whole;
- A ratio of total (direct+indirect+induced) to direct effects of 1.6 to 1

5.3 **Economic Impacts of Event Organisation**

Staging the event at Trent Bridge brought direct revenues to NCCC through its contract with the ECB. These revenues could be expected to cover the net costs of administering and staging the tournament.

The financial details of NCCC's bid to stage the tournament are commercially confidential.

Nevertheless, it is possible to quantify the value of some of the activities involved in staging the event, and their contribution to regional GVA and employment (Table 5.4). The table includes both costs incurred by NCCC and expenditures by the ICC from the central tournament budget, which covered temporary on-site posts associated with match-day administration, capital expenditure and installation services for new and temporary ground facilities and costs associated with emergency services attendance on stand-by for match days.

Table 5.4: Estimated Economic Impacts of Event Organisation

Item	Direct Employment (Job years)	Direct GVA (£)	Additional Local Purchases (£)
Event administration	2.8	£108,000	-
Match fees (to cover ground rent and maintenance)	2.0	£60,000	-
Stewarding	12.8	£409,200	7,000
Cleaning	2.8	£70,000	£15,000
Waste management			54,000
Marketing	-	-	£60,000
Ground Facilities	-	-	114,217
Emergency Services	4.9	214,500	
Total	25.3	£861,700	£250,217

In all, the organisation of the event is estimated to have provided 25 job years of employment and made a direct contribution to regional GVA of £861,700. In addition, the event involved expenditures of at least £250,000 on purchased goods and services provided by suppliers within the region. These expenditures are estimated to have supported an additional 2.8 job years of work and regional GVA of £125,000 among supplier businesses.

Indirect and induced effects are estimated to support a further 9.4 job years of work and regional GVA of £275,000. This assumes an indirect + induced multiplier of 0.6 for the impacts on supplier businesses, and an induced multiplier of 0.3 applied to direct employment and GVA (Table 5.5).

Table 5.5: Direct, Indirect and Induced Impacts

	Employment (job years)	GVA (£)
Direct effects	25.3	£861,700
Direct supplier effects	2.8	£125,109
Indirect and induced effects	9.3	£333,575
Total regional impact	37.4	£1,320,384

5.4 Economic Impacts of On-Site Service Provision

The economic impacts of on-site service provision are estimated as follows (Table 5.5).

Table 5.6: Regional Economic Impacts of Catering and Merchandising Activity

Item	Direct Employment (Job years)	Direct GVA (£)	Purchases (£)
Catering	7.3	£1,189,062	£297,266
Hospitality	2.0	£150,000	£64,000
Merchandising	-	-	-
Total	9.3	£1,339,062	£361,266

Catering, hospitality and merchandising activities are estimated to have supported direct employment of 9.3 job years and GVA of £1.3 million. In addition, there were estimated purchases of £361,266, of which £180,000 are estimated to have benefited firms in the region. These expenditures are estimated to have supported further supplier employment of 2.0 job years and GVA of £90,000. Additional regional multiplier effects are estimated to support a further 4.0 job years of work and GVA of £456,000. The total regional economic impact of these activities is therefore estimated to support 15.3 FTE jobs and GVA of £1.9 million (Table 5.6).

Table 5.7: Summary of Regional Impacts of Catering and Merchandising Activity

	Employment (job years)	GVA (£)
Direct effects	9.3	£1,339,062
Direct supplier effects	2.0	£90,000
Indirect and induced effects	4.0	£455,719
Total regional impact	15.3	£1,884,781

5.5 Economic Impacts of Visitor Expenditures

As outlined in Table 5.3, visitor expenditures outside the ground are estimated to have brought additional revenues of **£3,339,379** into the East Midlands economy. These expenditures are estimated to have supported:

- 66.8 job years of employment, based on an assumption of £50,000 of regional spending required to support 1 FTE job (taking account of direct, indirect and induced effects)
- £1,669,690 of GVA, based on an assumed ratio of £0.50 of regional GVA per £1 of visitor expenditure.

5.6 Summary of Economic Impacts

The estimated impacts of the tournament on regional employment and GVA are estimated as follows (Table 5.7). The event is estimated to have supported 120 job years of employment and GVA of £4.9 million in the regional economy. These are estimates of the overall net regional impact of the event, including multiplier effects.

Table 5.8: Summary of Estimated Regional Economic Impacts

	Employment (Job years)	GVA (£)
Operation of Event	37.4	£1,320,384
On site catering, hospitality and merchandising	15.3	£1,884,781
Off-site visitor Spending	66.8	£1,669,690
Total Impact	119.5	£4,874,855

It should be noted that the effects of the tournament itself are measured in terms of one-off impacts on GVA (measured in £ million) and employment (measured in job years of work). However, these contribute to ongoing employment and economic activity in the businesses concerned. Some of these impacts involved the creation of new jobs, either on a permanent or temporary basis, while others involve part jobs and help to sustain ongoing employment.

5.7 Benefits to Local Businesses

The above sections estimate the economic impacts of the ICC World Twenty20 tournament, based on analysis of expenditures. These expenditures benefit a wide range of businesses in the Nottingham and East Midlands economy, including hotels, pubs, restaurants, shops, utilities and providers of catering, laundry, transport and other services. In order to examine how these expenditures benefited individual local businesses, GHK conducted interviews with local businesses.

The purpose of the business survey was to provide an understanding of the types and scale of impact the Twenty20 Tournament had on local businesses. The survey should be used as an illustration of how the tournament affected businesses in close proximity to Trent Bridge. Two key issues were discussed with businesses:

1. What increased employment and profits resulted from the tournament?
2. What other impacts have resulted from the tournament?

The survey covered thirteen of the twenty five companies who supplied contact details at a pre-tournament consultation event at Rushcliffe Borough Council. The consultation event was held in order to explain how the tournament would function and the potential impact on local businesses. Businesses used the event to gather information for planning purposes.

The survey sample included hotels, public houses, cafes and restaurants within a few miles of Trent Bridge.

A copy of the business survey questions and full results summary is attached as Annex 4.

5.7.1 Positive Impacts on local businesses

Over half of the businesses surveyed stated that the tournament brought an increase in trade. One interviewee stated that the scale of the increase in turnover was dependent on which teams were playing at Trent Bridge. For example when India and Bangladesh were playing there was little extra business in public houses. However when England or Ireland were playing there was £500-£1,000 in additional revenue compared to a normal day of trading.

Total increased revenue across the tournament ranged from as little as £500 to as much as £3,000. Extra employment attributed to the tournament was a feature in public houses rather than restaurants. This additional employment took the form of increased hours of work for existing staff, with only one interviewee creating a new temporary post for the tournament.

Whilst the impact of the tournament on public houses appears to have been significant, our survey suggested it was less beneficial to restaurants and coffee shops. One of the restaurants surveyed noted only a slight increase in trade, but they also stated that visitors were not spending more per party than local trade. They remarked that this was unusual as their normal experience from Test match and ODI games is that parties visiting for matches at Trent Bridge usually spend more per party than Nottingham residents.

Another respondent noted a slight increase in trade which included Nottingham residents who had not been to Bridgford previously, because they had not been to cricket matches at Trent Bridge before and were used to socialising in the city centre. It is possible that this will be beneficial for both themselves and surrounding businesses over the longer term.

5.7.2 Negative Impacts on local businesses

One clear impact on businesses who took part in the survey was displacement of existing trade. This appears common to both restaurants and public houses. Several commented that local customers stayed away from the tournament. One landlord interviewed believes that this was because regulars thought it would be too busy. In addition it was thought that

locals stayed away during the tournament because parking was taken up by visitors, and that the situation was chaotic and dangerous at times, with cars blocking entrances.

Some businesses stated that expected trade did not materialise and that there seemed to be a tendency for people to go straight home rather than stay for a meal or drinks. Considered alongside displacement of trade from regulars there was a negative impact on profit for some businesses.

It is unclear whether any local displacement effects would have had a negative net impact on the Nottingham economy, since it is possible that local visitors staying away from businesses in the Trent Bridge area instead spent money elsewhere in the city, or delayed expenditures until after the tournament.

5.7.3 Neutral Impacts on local businesses

One hotel located 1 to 2 miles away from Trent Bridge saw no significant benefit from the tournament, with a negligible increase in trade and only one guest staying who was attending matches at Trent Bridge. In addition a coffee house located at the end of Central Avenue said he saw customers reach coffee shops at the end of the street closest to the cricket ground, but they didn't venture any further.

Furthermore as stated above, the local displacement effects noted, with locals seen to be replaced by a modest stream of visitors, who were not spending more per party than their regular trade, meant that many businesses considered that they faced a "zero sum game" with little or no impact on revenue.

5.7.4 The Twenty20 Tournament compared to a Test Match / ODI

There was general consensus among businesses interviewed that the T20 Tournament was not nearly as beneficial for local restaurants and bars than Test Matches or ODIs have been in the past. Many interviewees stated that they felt visitors came into the city and went home straight after the matches. Possible reasons given for this were;

- "The crowd of spectators seemed younger, perhaps they are not used to going out for a meal after a cricket match"
- "The matches finished too late, people are more likely to go out after a Test finishing at 6.30pm than 9.30pm after the Twenty20"
- "The Test Match format makes it more likely that people will stay overnight, so there is no rush to get away. Conversely the Twenty20 seemed to be more like a football crowd on a rampage to get to their cars or the train station"

5.7.5 Other Issues recognised by businesses

A number of other interesting views were offered by businesses.

- One business commented that the focus of Experience Nottingham should be widened so that it includes areas outside of the city centre; they stated that the focus on the city centre downplays the quality of the visitor offer that exists out of town. The surrounding countryside could serve as a more attractive base for visitors, potentially increasing the length of their stay.
- One restaurateur commented that it could have put more effort into marketing itself and perhaps worked more closely with the cricket ground distributing vouchers or something similar and will keep this in mind for future events.
- Several interviewees stated that the tournament raised the profile of Nottingham and visitors would have left with a very positive impression of the city. In addition a great atmosphere was evident during the tournament and the city was 'vibrant and busy.' However, revenue was not as high as expected and increased turnover resulting from

Nottingham Forest matches is far higher than that witnessed from the international matches staged during the tournament.

One landlord felt that overall the tournament was extremely beneficial, not necessarily for his business, but very positive for the image of the city and gave locals a sense of pride that their city was staging a globally significant event.

In recent years Nottingham has suffered from its poor image. Events such as the Twenty20 Tournament help to challenge assumptions about the city and the real value of the tournament may be way beyond any immediate benefit to NCCC or local companies. In general the atmosphere in the city was tremendous. A general comment was that organisers did a very good job with the street decoration and visitors commented that they were impressed with Nottingham and would recommend it, and particularly would recommend West Bridgford which was highlighted as an area with a separate cultural and entertainment offer.

5.7.6 Reflections on Business Survey Findings

The findings of the business survey may at first appear slightly contradictory to our impact assessment analysis, suggesting that the impact on local traders was not high.

However we would suggest that:

1. Expenses outside of the ground were widely dispersed, and so not necessarily likely to have a huge local impact, indeed the largest cost for visiting parties is accommodation. Our sample was mainly made up of public houses and restaurants.
2. More than half of those businesses interviewed reported an increase in turnover during the tournament. It is possible that the increases were higher than those reported to us.
3. The sample of local businesses attended a pre-tournament organised by Rushcliffe Borough Council. It is possible that expectations of high returns from visitors to Nottingham were raised, and the actual returns, although significant, were not as high as may have been expected.

5.8 Benefits for Place Marketing

Visitor perceptions

The ICC World Twenty20 tournament brought almost 100,000 visitors to Nottingham, the majority from outside the East Midlands, and many from overseas. Many of these people had not visited the city or the region previously, and formed their first impressions based on their visit, while others returned to the area after not visiting for many years. Their impressions of Trent Bridge, the City of Nottingham and the East Midlands are likely to play a role in influencing their likelihood of returning in future, or of recommending the area to others.

The spectator survey found that, on balance, the impressions of visitors to the tournament were very positive:

- 47% of respondents expressed a positive opinion of Nottingham and/or Trent Bridge as a result of their visit, with 11% indifferent and only 4% expressing a negative view. A large proportion (37%) offered no view, with many saying that they had come straight to the ground and not seen enough of the city to form any opinion.
- Positive comments about Nottingham referred to a variety of attributes including the urban environment, history, friendly people, shopping and nightlife. Comments include a number of favourable first impressions from spectators who had not previously visited the city, and some from visitors who had previously formed a negative impression of Nottingham from the media.

- The few negative comments mostly referred to traffic, parking, signage and navigation around the city.
- There were also many positive comments about Trent Bridge cricket ground. These focused on its pleasant and friendly environment, accessibility, and the impressive nature of the stadium. Several respondents noted improvements in the ground over the years, and there were some positive comments about the new facilities (including replay screens and seating).
- 60% of UK visitors from outside the region, and 65% of overseas visitors, indicated that they were more likely to return to Nottingham and the East Midlands in future as a result of their visit. The majority of the remainder had not been influenced either way, with very few saying that they would be less likely to return;
- A similar proportion of visitors indicated that they would be more likely to recommend the city and region to others as a result of their visit.

Further details, including many of the individual comments received, are provided in Annex 1.

Media Coverage

The analysis of expenditures presented in this report does not examine, or seek to quantify, the additional value derived from the tournament to various brands exposed as part of the media coverage, i.e. the East Midlands region; City of Nottingham; Trent Bridge as cricketing venue etc. Whilst it is undoubtedly true that some positive impact resulted from the extensive media coverage which resulted from tournament matches held at Trent Bridge, it is outside the scope of this study, and indeed inconsistent with the Sport England / IEF methodologies for establishing economic impact, to do so.

It should be noted though that the media coverage of the tournament matches held at Nottingham was very positive. There are numerous examples of positive coverage relating to Nottingham and Trent Bridge throughout, and subsequent to, the tournament. Quantifying this coverage and seeking to understand the possible impact of the media coverage may add an additional layer of intelligence for *emda* and local authority funders to understand the value of their investment in the redevelopment work at Trent Bridge.

6 EVALUATING THE TRENT BRIDGE REDEVELOPMENT

6.1 Economic Impacts of ICC World Twenty20 and Future Events

From the analysis in the previous section, we estimate that the ICC World Twenty20 tournament brought additional expenditures of £6.4 million to Nottingham. This resulted in a net increase in GVA of at least £4.9 million and employment of 120 job years in the East Midlands region in summer 2009.

There have been additional benefits through the role of the event in promoting the region to a wider audience, which may encourage more people to visit, trade with or invest in the East Midlands in future. The impressions of the estimated 66,000 spectators from outside the region visiting Trent Bridge were found on balance to be very positive. The event also presented Trent Bridge to a global TV audience, raising the profile of Nottingham as a result, though the limited depth and breadth of media coverage of the city means that the increased awareness of the city and region is likely to be superficial.

The measured economic impacts are one-off in nature, although the success in co-hosting the tournament may help Trent Bridge, Nottingham and the East Midlands to position themselves to bid for other international events in future. More directly, the Trent Bridge redevelopment greatly enhances the prospects of Trent Bridge in staging international cricket matches in future.

Evidence of previous international cricket matches suggests that Test Matches can be expected to attract additional sub-regional expenditures of between £1 million and £5 million, and one day internationals expenditure of £0.8 million. Were Trent Bridge to succeed in attracting one Test Match and one One Day International to Nottingham each year, this might be expected to bring expenditures of around £3 million to the city annually. This might be expected to involve additional expenditures of perhaps £2 million annually from outside the East Midlands, enhancing GVA by at least £1.5 million annually.

The total cost of the Trent Bridge redevelopment was £8.2 million, of which *emda* provided £2.5 million and the partner local authorities a further £3.7 million. The figures above suggest that *emda*'s investment has already been repaid in terms of enhanced regional GVA, and that the overall public sector investment of £6.2 million is likely to be matched by equivalent increases in GVA following one or two further Test Matches at Trent Bridge. This analysis assumes a counterfactual scenario in which, had the redevelopment not taken place, there would be no international cricket at Trent Bridge.

6.2 Construction and Related Impacts

NCCC records suggest that, of the £8.2 million cost of the Trent Bridge redevelopment, £7.0 million was spent with suppliers and contractors within the region.

The main building contractor was a local firm, Cleggs. The floodlighting providers, Abacus, based in Sutton in Ashfield, have since gone on to win contracts for Lord's and Oval. The redevelopment project therefore had a catalytic role in positioning them to win additional business outside the region. The Quantity Surveyor and architect services were also provided by local companies.

It is estimated that the temporary impact of the £7.0 million of construction related expenditures was to support 78 job years of work and GVA of £3.5 million directly, and 125 job years of work and GVA of £5.6 million in total. These estimates are based on an

assumed turnover of £90,000 per job year of work, £0.5 GVA per £1 turnover, and a regional multiplier of 1.6 (Table 6.1).

Table 6.1: Estimated Temporary Construction Related Impacts

	Direct effects	Indirect and induced effects	Total impact
Expenditure (£m)	7.0	4.2	11.2
Employment (job years)	78	47	125
GVA (£m)	3.5	2.1	5.6

6.3 Assessment of Additionality

6.3.1 Overview

To evaluate the additional impact of *emda*'s investment in Trent Bridge on the regional economy, the assessment needs to examine different aspects of additionality, with regard to:

- The role of *emda*'s investment in stimulating additional investment at Trent Bridge;
- The role of the Trent Bridge redevelopment in attracting the ICC World Twenty20 tournament to the region;
- The additional net impact of the tournament on the region's economy.

The estimates in Section 5 measure the net economic impact of the tournament on the region, in particular taking account of displacement, economic leakages and multiplier effects.

The additional effects of *emda*'s investment are considered as follows.

6.3.2 Deadweight

Deadweight needs to be examined with regard to:

1. Whether the Trent Bridge redevelopment could have taken place in the absence of funding.
2. Whether the region could have attracted the ICC World Twenty20 tournament without the redevelopment of Trent Bridge.

The second of these questions is easier to answer than the first. It is clear both from ECB standards for international cricket venues and from comments made to us by the ICC regarding the requirements of the World Twenty20 tournament that Trent Bridge would not have been in a position to bid to co-host the tournament, nor indeed any significant international cricket match in future, had the redevelopment not taken place.

The first question is more difficult to assess with certainty. Nottinghamshire CCC stressed to us that they were in no position to fund the redevelopment themselves, without support from *emda* and the local authorities, their bankers confirm that this is the case. This is reflected in the funding package, in which NCC provided £2 million (24% of the investment) and the public sector partners £6.2 million (76%). Without a detailed appraisal of NCCC's finances and discussions with their bankers it is not possible to verify the extent to which they could have funded the development without public sector support. However, we note that both *emda* and the local authorities were convinced of the need for this support at the time.

Further evidence of the scope for NCCC to fund the investment can be gained from assessing the degree to which the project has benefited NCCC relative to the wider region. We estimate that visitors to the tournament from outside Nottingham spent an additional £2.4 million inside the ground and £3.5 million in the wider city. Without measuring the return on investment, this demonstrates that NCCC have achieved significant commercial benefits from the redevelopment, as they would expect to as investors in the project. However, it also demonstrates that the benefits to the wider region exceed those to the cricket club itself.

This assessment strongly suggests (but does not conclusively prove) that the redevelopment could not have been financed without *emda* involvement. It is also clear that the private benefits to NCCC represent a relatively small proportion of the economic returns to the region. The investment therefore demonstrates a clear positive externality effect, indicating a strong market failure rationale for intervention.

6.3.3 **Substitution**

Substitution refers to a situation where a beneficiary substitutes one activity for another in order to benefit from an intervention. As a result there is an internal displacement effect. This is not an issue with regard to the Trent Bridge project, which was formulated by NCCC which then approached *emda* and its partners for funding.

6.3.4 **Displacement**

Displacement refers to a situation where an increase in economic activity is offset by a decline in economic activity elsewhere in the area of interest. It is a key consideration in assessing the economic impact of any event. The analysis therefore considered the extent to which expenditures by visitors to Trent Bridge were likely to be offset by expenditures elsewhere in the region. This is particularly relevant to visitors from within the region, who might have been expected to spend their money elsewhere in the region had they not visited Trent Bridge.

The economic assessment methodology dealt with displacement by including in the regional analysis only estimates of expenditure by visitors from outside the region. This assumes therefore that only expenditures from extra-regional visitors contributes to the net impact of the event and that spending by regional visitors has a 100% displacement effect.

The main displacement effect relates to expenditure by spectators, who were estimated to spend £5.2 million in the region in total, of which £4.5 million is estimated to be additional expenditure originating from outside the region and £0.7 million is considered merely to displace other expenditures in the region. There is therefore an effective displacement ratio of 13% of spectator spending.

6.3.5 **Leakage**

Leakage refers to a situation where some of the beneficiaries of the intervention are outside the target area. This is not the case for the Trent Bridge redevelopment, which is clearly located within the East Midlands region.

As with any event or economic development project, there are economic leakages, in the sense that some of the money spent by participants in the tournament left the region to the benefit of suppliers elsewhere in the UK or overseas. For example, it is likely that much of the food and drink consumed by visitors to the tournament was sourced outside the region. These economic leakages are dealt with in the economic assessment methodology, which has sought at each stage to measure the proportion of expenditures which contribute to regional GVA, rather than leaking from the region in purchases of externally sourced goods and services.

6.3.6 *Economic Multipliers*

The economic analysis above estimates the total economic impact of event related spending, by applying economic multipliers, sourced from a wider data and literature review, to estimate indirect and induced effects.

6.4 *Strategic Added Value*

A key element in *emda's* Corporate Plan 2008-11 is to evaluate the agency's activity in a manner consistent with the BERR national Impact Evaluation Framework. In relation to understanding the Strategic Added Value (SAV) of the agency's activity there is a stated aim to 'articulate, examine and assess *emda's* Strategic Added Value.'

The 2009 'Evaluating the Impact of East Midlands Development Agency' report outlined the positive impact that *emda* activity has had between 1999 and 2007:

Strategic Added Value has become an increasingly important part of the Agency's activities in recent years. The Agency demonstrates strong engagement and leadership. It exerts an important influence on other organisations and levers in substantial resources both directly and through laying the foundation for future activity. The Agency builds effective strategic linkages and innovation is a prominent feature of its work³

Our approach to assessing the strategic added value provided by *emda* follows a methodology developed through a range of project and programme evaluations and is recognised by BERR as fully IEF compliant. We consider the SAV of *emda* involvement in the Trent Bridge redevelopment in three ways: the agency's strategic and catalytic role; its coordination, alignment and partnership; and the influence and awareness raising role of the agency.

In order to understand and evaluate the SAV of *emda* involvement in this particular instance a total of 14 statements regarding SAV were developed and grouped under these three headings (the survey instrument is attached as Annex 3). Senior representatives from Rushcliffe Borough Council, Nottingham City Council, Nottinghamshire County Council and Nottinghamshire County Cricket Club (NCCC) were asked to 'score' the extent to which they agreed or disagreed with these statements⁴, and to explain the reasons behind their decision.

The results of this work are presented below under the three SAV headings. The scores are based on the answers from interviews with the local authorities and NCCC stakeholder interviewees; the small sample is indicative of the relatively small number of stakeholders directly involved in the project.

6.4.1 *Strategic / Catalytic Role*

The *strategic/ catalytic role* of *emda* relates to the agency's ability to identify the needs and opportunities facing the East Midlands and catalyse partners into an appropriate, strategically effective, response.

In general, the view of stakeholders regarding leadership shown by *emda* in the redevelopment of Trent Bridge was very positive; most stakeholders also recognised the role of NCCC as equally significant in ensuring that the delivery coalition for the redevelopment was in place. In particular the role played by both *emda* and NCCC in

³ Ecotec, (2009) *Evaluating the Impact of East Midlands Development Agency. Overall Assessment Report – Executive Summary. pp.ii*

⁴ On a scale of 1 to 5, where 1 is equivalent to 'Strongly Agree', 2 is equivalent to 'Agree', 3 is equivalent to 'Neither Agree nor Disagree', 4 is equivalent to 'Disagree' and 5 is equivalent to 'Strongly Disagree.'

working with local authorities to articulate the benefits of investment for each local authority was frequently referenced.

Table 6.2: Views of sub-regional stakeholders on the Strategic/Catalytic SAV of *emda* in relation to the Trent Bridge Redevelopment

Statement	Average score (where 1 = strongly agree; 5 = strongly disagree)	Additional comments
<i>emda</i> set out a clear vision for promoting economic development in the region through sport	2.0	There was some divergence of opinion regarding <i>emda</i> 's leadership in this area, with some stakeholders arguing that the agency had a clear, well developed strategy and others arguing that the sporting assets of the city could be better exploited, but that the Olympics were acting as a useful catalyst.
<i>emda</i> supported appropriate interventions for delivering this vision	1.8	<i>emda</i> 's support in attracting the Twenty20 Tournament and developing project activity to ensure that the region benefits from the 2012 Olympics were cited as examples of the agency's commitment.
<i>emda</i> levered in additional investment, funding and resources	1.3	All stakeholders recognised the role played by <i>emda</i> , in partnership with NCCC, in driving forward the delivery of the redevelopment work and ensuring all local authorities were signed up to the redevelopment work.
<i>emda</i> contributed to the development of new ideas or approaches	2.7	Most stakeholders felt that <i>emda</i> did not, nor were they required to, shape new ideas or approaches. The rationale and detail of the project were substantially established prior to <i>emda</i> involvement
<i>emda</i> shaped a more strategic way of thinking	2.7	As above. It was felt that NCCC were already thinking strategically regarding securing Test Match, ODI and Twenty20 Tournament cricket events prior to <i>emda</i> involvement.
<i>emda</i> encouraged engagement in regional strategy/policy	1.9	Most stakeholders agreed that <i>emda</i> had engaged them in strategy/policy development, but perhaps NCCC led this activity

6.4.2 Coordination, Alignment and Partnership

In essence coordination, alignment and partnership relates to the way in which the agency effectively influenced the priorities and activities of other actors and agencies addressing similar issues in the region, and the extent to which the agency has influenced available resources to deliver improved outcomes for all organisations.

Most stakeholders felt that *emda* was not a big influence in terms of making substantial changes to the content of the project. This is in part due to the fact that the redevelopment project originated prior to *emda* involvement, and was in direct response to the changing conditions in which Test Match, and other high profile cricket events, are allocated to venues in England and Wales.

However most stakeholders expressed the view that *emda* asserted a positive influence on the redevelopment project where it was appropriate to do so. The main area in which this positive influence was evident was in working with NCCC to agree the funding model for the project. Furthermore involvement from *emda* was key to providing local authority senior decision makers with the confidence to commit funding the redevelopment.

Table 6.3: Views of sub-regional stakeholders on the Coordination, Alignment and Partnership SAV of *emda* in relation to the Trent Bridge Redevelopment

Statement	Average score (where 1 = strongly agree, 5 – strongly disagree)	Additional comments
<i>emda</i> facilitated greater partnership working	2.0	Some stakeholders saw <i>emda</i> as secondary in facilitating delivery of the redevelopment work, with NCCC the main facilitator. This is understandable given NCCC was the main beneficiary. However stakeholders recognised the role of <i>emda</i> in coordinating activity and driving the partnership once it became involved.
<i>emda</i> achieved synergies with other relevant initiatives	2.3	Links were made between the redevelopment work at Trent Bridge and using Trent Bridge as a training camp facility for the 2012 Olympics, but the view of most stakeholders was that the redevelopment work was justified in itself as an intervention with huge payback for the city and region.
<i>emda</i> promoted sharing of regional intelligence	2.3	There was broad agreement on this statement, with the view of most stakeholders that the sharing of intelligence in this project will have beneficial long term effects for future work (the 2012 Olympics and 2018 Football World Cup bid)

One of the key outcomes of the project has been the formation of an effective partnership which has continued to deliver community projects on an ongoing basis. This is discussed further in the section on “legacy impacts” below.

6.4.3 ***Influence and Awareness Raising***

The extent to which agency involvement has influenced the various actors and agencies operating in the interface between sport and economic development has been assessed by testing agreement with the statements set out in Table 5.11.

Stakeholder analysis suggested that *emda* led the delivery of the redevelopment effectively but there was limited influence of other partners. However stakeholder interviews highlighted two main issues:

1. *emda* contributed effectively by assisting NCCC to articulate the implication of not investing in Trent Bridge
2. The leadership and awareness raising demonstrated by NCCC in the early stages of the development was invaluable in securing local authority buy-in to support the redevelopment.

Table 6.4: Views of sub-regional stakeholders on the Influence and Awareness Raising SAV of *emda* in relation to the Trent Bridge Redevelopment

Statement	Average score (where 1 = strongly agree, 5 = strongly disagree)	Additional comments
<i>emda</i> influenced the spend and activities of partners (both public and private)	2.7	Whilst all stakeholders noted the useful role played by <i>emda</i> some of the local authorities asserted that NCCC were the most significant influence on their spend and activity. However <i>emda</i> did play a useful role.
<i>emda</i> enhanced the quality of the project and the activities supported	2.0	The experience of delivering significant capital projects was useful, as was the commitment to ensure a very good BREEAM status for the development.
<i>emda</i> helped to inspire confidence in the prospects for sport to contribute to economic growth in the region	2.3	Some stakeholders noted that this statement was true of all stakeholders who were part of delivering the redevelopment activity.
<i>emda</i> helped to increase the profile and raised awareness of the region	2.7	As above, this statement was probably true of the redevelopment team as a whole.
<i>emda</i> promoted good practice in scaling up beneficial activities	3.5	This element of the SAV analysis was perhaps not as appropriate as other elements. The redevelopment work was not scaled up as a result of <i>emda</i> involvement – but <i>emda</i> funding was recognised as key.

6.5 Legacy Impacts: Beyond Cricket

Although not quantifiable at this stage there are a number of additional legacy benefits that have resulted from both the process and delivered redevelopment work. Not least NCCC believe that as a direct result of the facilities upgrade during the redevelopment, Trent Bridge has been accredited as a 2012 pre-Olympic Games Training Camp venue and the Club is in discussion with Archery GB to host International archery events in 2010 and 2011. Legacy impacts relating to the delivery partnership, visitor perceptions and potential results of the media coverage are discussed below.

6.5.1 An Effective Regional Partnership

What commenced as a group of Public/Private Sector partners coming together to finance the ground redevelopment at Trent Bridge, has developed into a groundbreaking partnership which is not only contributing meaningfully to the Regional Economic Strategy but is also working in ways we had not imagined.

D. Brewer Submission to EM Select Committee

As part of NCCC agreements with the Local Authorities, the Club committed to a series of Community Milestones over a five-year period. Three projects are currently being managed in addition to day-to-day Community activities. These are:

- The **'Say Yes' Campaign** targeting hard to reach and disadvantaged youngsters in the City of Nottingham. The venue was used as the hub for this wide-ranging programme.
- Two **Playing4Success Study Support Centres** in partnership with Nottinghamshire County Council.
- A **Positive Futures Programme** which has been set up in partnership with Rushcliffe Borough Council over a three-year period in Cotgrave. As with 'Say Yes' the youngsters targeted are 'at risk' and the programme is considered to be groundbreaking for a Cricket Club.

7 CONCLUSIONS AND RECOMMENDATIONS

7.1 Economic Impact of the Tournament

As a result of our analysis we have calculated itemised expenditure for different actors during the Twenty20 Tournament. Our analysis has established that:

- The tournament has attracted additional expenditure of £6.4m to the city of Nottingham; of this £2.7m was spent inside Trent Bridge and £3.7m was spent in the city.
- The estimated additional regional expenditure (i.e. spending in the East Midlands from visitors outside the region) is estimated at £5.9m. Of this, £2.3m is spent inside Trent Bridge and £3.6m in the wider region.

The estimated impacts of the tournament on regional employment and GVA are estimated as follows:

- Operation of the event: GVA = £1.3m and Employment = 37 Job Years
- On site catering, hospitality and merchandising: GVA = £1.9m and, Employment = 15 Job Years
- Off site visitor spending: GVA = £1.7m and Employment = 67 Job Years

The total impact is therefore calculated to be £4.9m GVA and Employment of 120 Job Years

In addition to the impact of the World Twenty20 we have recognised and calculated the economic impact of the construction phase of the redevelopment work. We calculate impact as:

- £11.2m expenditure,
- £125 Job Years of employment; and
- £5.6m GVA.

7.2 Net Economic Impact of emda Investment

The hosting of the ICC World Twenty20 tournament at Trent Bridge represents only the first payback on the investment of emda and its public sector partners. The analysis indicates that the impacts provide a strong return on the investments of all the partners involved, and that further positive returns can be expected in future from Test Matches and other cricket internationals.

The analysis estimates the net additional impact of the tournament on the East Midlands economy, taking account of displacement, leakage and economic multiplier effects. At the project level substitution is not considered to be an issue. The extent of deadweight is difficult to measure with certainty, though NCCC, while benefiting financially from the investment, has clearly stated that the project would not have been able to take place without emda's involvement.

The substantial impacts of expenditures outside the ground on the wider East Midlands economy mean that the project demonstrates a strong positive externality effect - the economic returns at regional level significantly exceed those captured by NCCC itself. This represents the key market failure rationale for intervention.

7.3 Strategic Added Value of emda involvement

emda has clearly played a vital role in establishing and developing the delivery coalition involving Nottingham City Council, Rushcliffe Borough Council and Nottinghamshire County

Council. The role played by both *emda* and NCCC in working with local authorities to articulate the benefits of investment for each local authority is an example of strategic leadership from the development agency in order to ensure delivery of activity which has a demonstrable positive impact at both local and regional level.

It is also evident that *emda* was key to providing local authority senior decision makers with the confidence to commit funding the redevelopment. Furthermore this has led to a key outcome from the project; the formation of an effective partnership between local authorities and NCCC, which continues to deliver community projects.

7.4 Recommendations

1. We recommend that future evaluation activity of this type uses the combined UK Sport / IEF methodology in order to ensure that established economic impacts are comparable.
2. Assessing the economic impact of the redevelopment work at Trent Bridge has involved accessing and interrogating a number of data sources and information held by NCCC and the delivery agents of the ICC. This process has been facilitated by NCCC, their ability and willingness to cooperate with the evaluation has added value, and ensured that both the quality of data is high and where assumptions have been made they have been informed by the best information available. We recommend that *emda* seeks to develop and replicate this model of working with partners on evaluation projects.

Given the willingness of NCCC to assist with the economic impact assessment of the redevelopment work we recommend that *emda* considers carrying out an economic impact assessment at a future Test Match, to provide further evidence of the return on investment.

ANNEX 1: SPECTATOR SURVEY, TRENT BRIDGE

Introduction

In order to gather information about visiting patterns and visitor expenditures, GHK completed a survey of spectators at Trent Bridge during the tournament.

The questionnaire was designed to collect the required information in as concise a format as possible, to keep the time taken for each interview to less than five minutes. The questionnaire was piloted at a domestic Twenty20 Cup match at Trent Bridge between Nottinghamshire and Durham on 25 May 2009, enabling us to improve the format and wording of some of the questions.

A copy of the survey questionnaire is given in Annex 2. Fieldwork took place on 5 dates (Table A1).

Table A1: Summary of Fieldwork

Date	Matches	Number of Fieldworkers	Number of Interviews Completed	Number of Spectators Covered	Average Party Size
Monday 8 June 2009, Group Stage	Ireland v Bangladesh, 1.30pm Australia v Sri Lanka, 5.30pm	2	65	312	4.8
Wednesday 10 June 2009, Group Stage	Sri Lanka v West Indies, 1.30pm India v Ireland, 5.30pm	2	63	327	5.2
Thursday 11 June 2009, Super Eights	New Zealand v Ireland, 1.30pm England v South Africa, 5.30pm	3	94	283	3.0
Tuesday 16 June 2009, Super Eights	New Zealand v Sri Lanka, 1.30pm South Africa v India, 5.30pm	3	124	562	4.5
Thursday 18 June 2009, Semi Finals	Women's Semi-Final, New Zealand v	2	86	292	3.4

	India South Africa v Pakistan, 5.30pm				
Total		12	432	1776	4.1

Fieldwork took place on all match-days at Trent Bridge with the exception of Saturday 6 June, when only a single match took place, between India and Bangladesh.

In all, 432 interviews were completed, through a total of 12 person days of fieldwork. Interviews were conducted face-to-face, prior to the day's play, and in the gaps between innings and matches, to minimise disturbance to spectators. We found that spectators were more than willing to be interviewed in this way, with a response rate of more than 99% achieved.

Interviewees were asked questions about the visiting patterns and expenditures of their whole party. As a result, the interviews gathered information about the visits of a total of 1776 spectators, an average party size of 4.1. The figures indicate marked variations in average party size between days, which was influenced by the presence of some very large parties at some matches.

Origin of Visitors

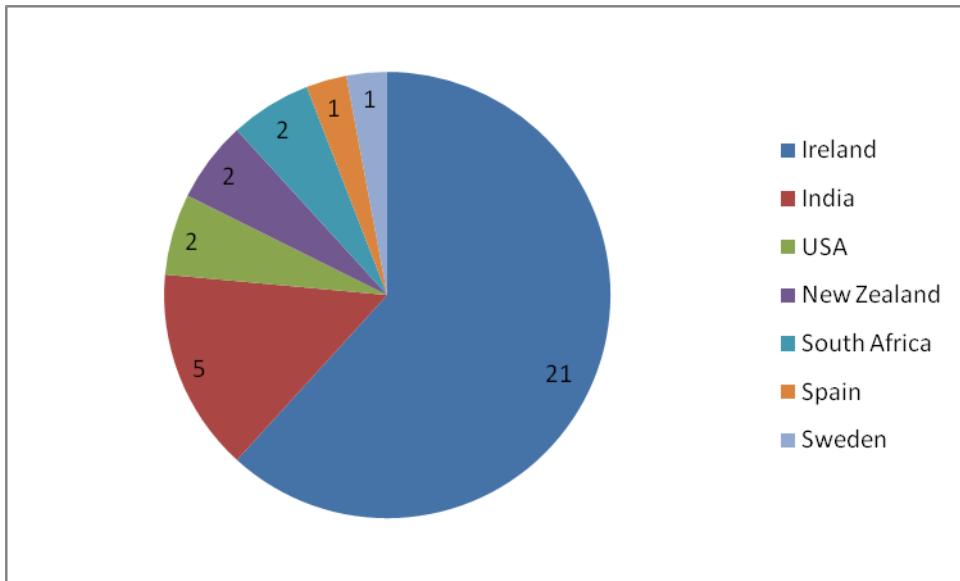
A key determinant of the impact of the event was its ability to attract spectators from outside the East Midlands region. Some 70% of the spectators covered by the survey originated from outside the region, with 7% visiting from overseas and 63% from elsewhere in the UK (Table A2).

Table A2: Origin of Visitors

	No of Parties	No of Spectators	% of Spectators
Nottingham	55	197	11%
East Midlands	106	347	20%
Elsewhere in UK	237	1112	63%
Overseas	34	120	7%
Total	432	1776	100%

Most of the overseas parties interviewed came from Ireland (60%), followed by India (15%), and New Zealand, South Africa and the USA (6% each, Figure A1).

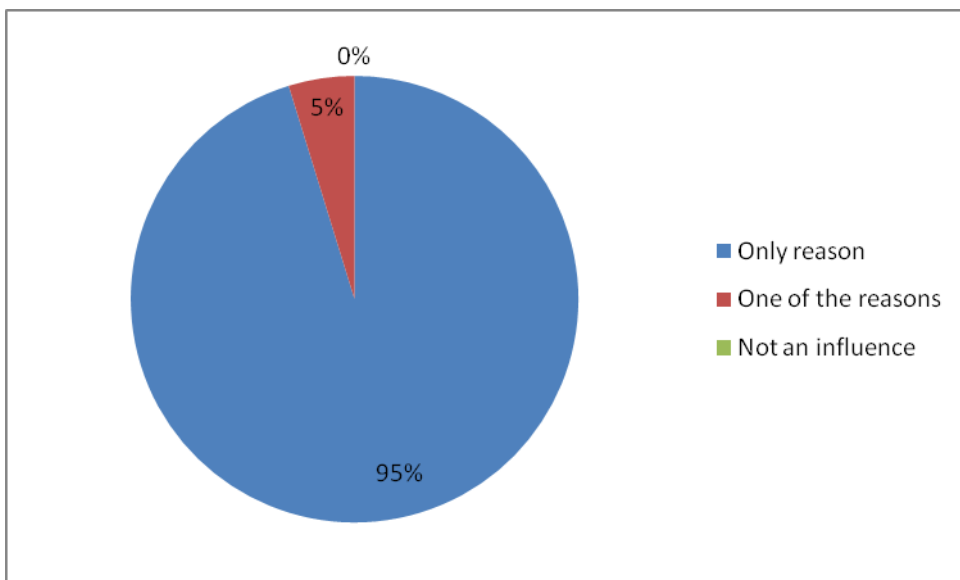
Figure A1: Origin of Overseas Visiting Parties



Motivation for Trip

Visitors from outside Nottingham were asked about the role of the Twenty20 tournament in encouraging them to visit the city. Some 95% indicated that the tournament was the sole reason for their visit to the city, while 5% indicated that it was one of the reasons for visiting Nottingham. No one stated that the tournament was not an influence for their visit (Figure A2).

Figure A2: Influence of T20 Tournament on Decision to Visit Nottingham



Duration of Trip

In the sample as a whole, 77% of respondents were on a day trip from home while 23% were staying away from home. Unsurprisingly, a very large proportion of spectators living in the region were on a day trip to Trent Bridge, while 21% of visitors from other parts of the UK and 100% of those from overseas were staying away from home (Table A3).

Table A3: Proportion of Day Trippers and Staying Visitors, by Origin

Origin of Visitor	Proportion of:	
	Daytrippers	Staying Visitors
Nottingham	100%	0%
East Midlands	97%	3%
Elsewhere in the UK	79%	21%
Overseas	0%	100%
Total	77%	23%

Of those staying away from home, more than three quarters had found accommodation in Nottingham, and a further 11% in the East Midlands (Figure A3). Of the 10% staying outside the region, most were overseas visitors, typically staying in London or Birmingham.

Figure A3: Location of Accommodation for Visitors Staying away from Home

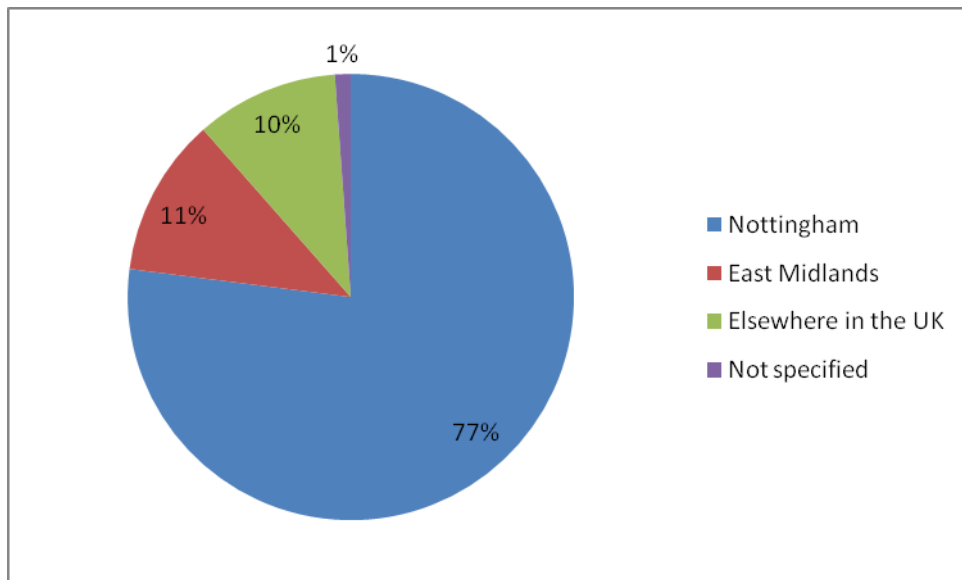


Table A4 gives details of the types of accommodation used by visitors. In all, 68% of visitors staying away from home were using hotel accommodation, with this figure highest, at 78%, for those staying in Nottingham. The majority of visitors staying elsewhere in the East Midlands region were visiting friends and relatives.

Table A4: Type of Accommodation Used

	Nottingham	East Midlands	Elsewhere in UK	All
Hotel	78%	30%	44%	68%
B&B	7%	0%	0%	6%
Self Catering	3%	0%	11%	3%
Camping/caravan	1%	0%	0%	1%
Visiting friends/relatives	10%	70%	44%	22%
Total	100%	100%	100%	100%

Visitors staying away from home were also asked how many nights they were planning to spend in Nottingham, elsewhere in the East Midlands and elsewhere in the UK, during the ICC World Twenty20 tournament. Most visitors to Nottingham were on a short trip of 1-3 nights, with an average duration of 2.2 nights. The average stay in the wider East Midlands was rather higher, at 4.1 nights. Of those staying elsewhere, a large proportion were overseas visitors, and this group had a longer average trip duration of 6.8 nights.

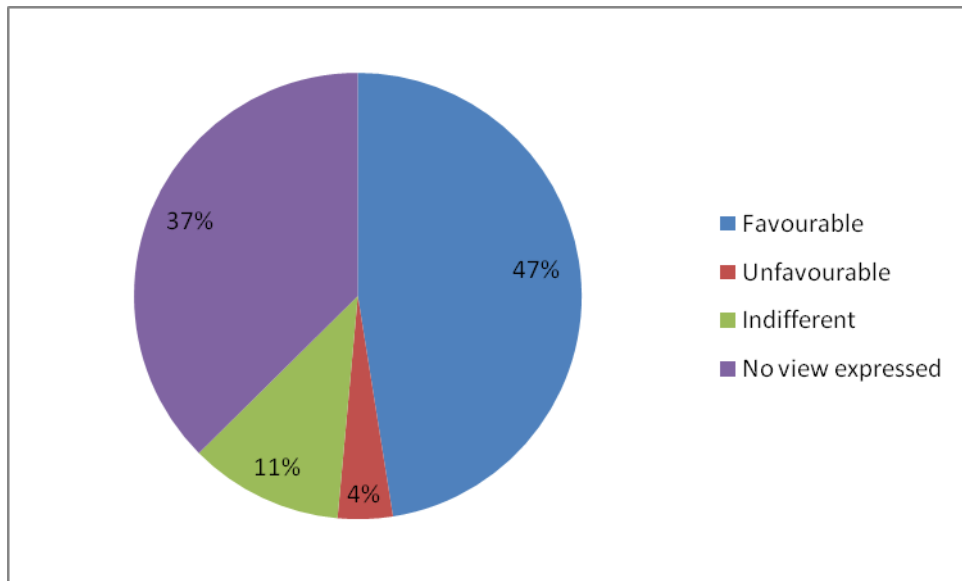
Table A5: Duration of Trip (Nights)

Number of Nights	Number of Parties Staying in:		
	Nottingham	East Midlands	Elsewhere in UK
1	25	2	1
2	15	3	5
3	14	2	0
4	9	0	2
5	1	2	0
6	0	0	0
7	0	1	3
8+	0	1	5
Total Nights	138	45	109
Average per party	2.2	4.1	6.8

Perceptions of Nottingham

Spectators travelling from outside Nottingham were asked whether they had any comments about the city or about the Trent Bridge ground as a result of their visit. A large proportion (37%) offered no view, with many saying that they had come straight to the ground and not seen enough of the city to form any opinion. However, 47% of respondents expressed a positive opinion about Nottingham and/or Trent Bridge, 11% were indifferent and only 4% expressed a negative view.

Figure A4: Summary of Comments on Nottingham and Trent Bridge



Positive comments about the city of Nottingham referred to a variety of attributes including the urban environment, history, friendly people, shopping and nightlife (Box A1). The comments include a number of favourable first impressions from spectators who had not previously visited the city, and some from visitors who had previously formed a negative impression of Nottingham from the media.

Box A1: Positive Comments about Nottingham

- I like it so far, West Bridgford is very nice, good impressions.
- Nice - good cricket ground - town is easy to access and seems well kept
- I come regularly – I like the cricket ground and the city - described as 'rock city'
- I like Nottingham - it's a good day out with lots of things to do like the forest/castle
- The city seems grand
- There is good shopping and things to do e.g. Ice skating
- Media proliferation has given Nottingham a negative impression, but it seems clean and positive now here. Better than expected.
- Seems like a nice place – the cricket ground is good and there is nice scenery/landscape as you enter the region on the train
- Nice river and good pubs
- Friendly people and atmosphere
- I like the town centre and castle - friendly people and a clean city
- I like it - everything is close together - good bars/hotels etc

I like the waterways

I've never been to the city centre but the area looks like a nice rural environment

Good shopping/nightlife

Lovely city - easy to get around and lots of things to visit

Very good - lovely city - clean and friendly

Interesting - a good bus service and I liked the old centre with the lace market (an unspoilt area). People are friendly, tourist information is helpful and it's good value for money compared to Ireland.

Nice area with lots to do – I visited Sherwood Forest and enjoyed it (but thought it closed too early)

Nice - clean city, like the bridge/scenery

Easy to get around - impressed by the City and like the stadium

I walked from the station to the stadium - good atmosphere and I liked the city

I like it - particularly the shopping

Really nice city. Good nightlife.

Very good. Good bus system. Loved Nottingham Castle and Sherwood Forest, Really nice.

Nice, lots of bars.

Easy to drive in and park, quite green

Very green

It's brilliant. I come regularly. It's always lovely. It's much nicer than London.

It's a historic city. It's old school. I like it.

Positive impressions. Nottingham is a great city, better than I expected it to be. People are nice.

Okay, nice city. Good transport system. Friendly.

I'm quite surprised how pretty it is. I might come back to Nottingham for the weekend some time.

I like the city, especially the open/green spaces. The ground is lovely

This is our first visit and so far we are very impressed - the ground is nice and the city centre is impressive

I like the city - the history makes it a particularly interesting place to visit.

I like the city and am enjoying the day out. The parking facilities are good and cheap, however the pay and park is more costly. There seem to be several restaurants conveniently placed outside the ground which is a positive point.

Positive - went to Bolton and Blackpool in the last few days and I've never seen such terrible places - Nottingham is fresh and clean.

The city is brilliant - nice landscape and the atmosphere in the stadium is really good
Nice ground, nice city and good nightlife

There were also many positive comments about Trent Bridge cricket ground (Box A2). These focused on its pleasant and friendly environment, accessibility, and the impressive nature of the stadium. Several respondents noted improvements in the ground over the years, and there were some positive comments about the new facilities (including replay screens and seating).

Box A2: Positive Comments about Trent Bridge Cricket Ground

I would say this is my number one ground, but I've not seen much else yet.

I've only seen the stadium. It's quite impressive

The stadium is fantastic

Like it - cricket stadium is one of favourite grounds and there is plenty to do

Easy access, good parking

I like the whole atmosphere and stadium is easy to get to - everything within easy reach

I like the cricket ground - do not know Nottingham very well

Grand enough. Great ground.

Beautiful, easy to access, good parking

It hasn't affected my opinion. I like the ground. It's like a big village cricket ground. The people of Nottingham are friendly.

The ground is impressive, I've been very impressed.

Not seen much of the region, only the ground. But what I have seen has been great.

It's bigger than I expected. It's good apart from the game meaning nothing

It's alright. We have been before. You can walk all the way around the ground. It's a good day out.

The ground is fantastic. I have a friend from Nottingham. We've come on a few days with different groups of school children. It's a fantastic place to bring them.

It's been my first visit for a long time. There's a good atmosphere. It's a good day out. A good party occasion - I would come back

They have improved the ground. It's brilliant. It's a good night out in the city. You've got to make the most of it.

It's a very good ground. It's nicer than Indian grounds. It's better to watch cricket in the UK.

It's great. I thought it would be bigger. It's intimate.

It's brilliant. We like Nottingham. It's a brilliant stadium. The new stand is excellent.
The ground has improved. It's accessible. It's a friendly ground.
It's changed my opinion. It's very friendly. It's an approachable ground. There is good parking.
Everything's all right. I like the two screens. It has been a pleasant first experience.
It's changed. There is new seating. I am enjoying it.
The stadium is very good with good amenities. In addition the staff are friendly and it is easy to navigate around the ground.
Fabulous ground and the crowd is fun – I have not yet seen the city
Ok - second visit and it's easy to get to with a nice stadium
It's a better ground than Old Trafford - definitely like the ground and its a good location - haven't really had a chance to see the city
The ground is amazing - haven't seen much of the city but the river is gorgeous
Stadium is excellent and compares well to others - the city is fine
Superb venue - very intimate and compares well to others (I come at least once a year to TB). I really like the city and will definitely come again for a family day out

The few negative comments mostly referred to traffic, parking, signage and navigation around the city (Box A3).

Box A3: Negative Comments about Nottingham and Trent Bridge

The traffic situation at Trent Bridge is bad, especially the A52. There are bad parking facilities. I came straight to the ground so have no other impressions.
Signage from city centre to Trent Bridge is very poor
The parking is not great
I wouldn't want to be walking late at night in the city
Expensive parking. Alright city.
We're struggling to find non-student nights out. No one will let us in because we are a group of lads and too old!
Not very impressive - nothing unique
Not as nice as Leicester
Poor parking and traffic
Very sprawly city which makes it different to find your way around. That said I think signage is quite good

No particular comments other than poor traffic situation.

It looks like it isn't a beautiful city but we've not seen much

Negative- rubbish city doesn't look good

I won't tell you what I think of Nottingham – I do not want to offend you!

The ground would benefit from a better shop like Lord's. You need to allow horns and whistles in the ground to create a better atmosphere.

Facilities are light. Restrooms and food service are not up to US standards. Poor directions from stadium. Haven't really seen much of Nottingham so can't comment on that.

There is unnecessary noise in the ground - loud music and tannoy prior to the game.

We're going home after the game - there is too much violence to go out in Nottingham. Please put more bins around the ground. They should allow musical instruments for a better atmosphere.

City not properly advertised online in terms of what to do when we got here. Plenty of information once we got to the city but too late to plan.

Interviewees were asked whether or not they were more or less likely to return to Nottingham or the East Midlands as a result of their trip. The majority of respondents – particularly from outside the region – indicated that they would be more likely to return as a result of their visit. Most others indicated that the visit had not influenced their likelihood of returning, and very few suggested that they would be less likely to come back.

Table A6: Influence of Trip on Likelihood of Returning to Nottingham/East Midlands

Likelihood of returning	Origin of respondent:			
	East Midlands	Elsewhere in UK	Overseas	All
More Likely	45%	60%	65%	56%
Not Affected	54%	39%	35%	43%
Less Likely	1%	1%	0%	1%
Total	100%	100%	100%	100%

When asked about whether their trip would make them more or less likely to recommend the city or region to others, responses were very similar to those for the previous question (Table A7).

Table A7: Influence of Trip on Likelihood of Recommending Nottingham/East Midlands to Others

Likelihood of returning	Origin of respondent:			
	East Midlands	Elsewhere in UK	Overseas	All
More Likely	45%	60%	65%	56%
Not Affected	54%	39%	35%	43%
Less Likely	1%	1%	0%	1%
Total	100%	100%	100%	100%

More Likely	43%	60%	68%	56%
Not Affected	57%	39%	32%	43%
Less Likely	0%	1%	0%	1%
Total	100%	100%	100%	100%

Party Size

The average party size was 4.1, with visitors travelling from outside the region tending to be in a larger party than regional visitors (Table A8). The total number of people travelling with the survey respondents (and therefore covered by the survey) was 1789, of whom 1776 visited Trent Bridge.

Table A8: Numbers of People in Visiting Party

	Number in party	Number watching match	Average party size
Nottingham	197	197	3.6
East Midlands	353	347	3.3
Elsewhere in UK	1119	1112	4.7
Overseas	120	120	3.5
Total	1789	1776	4.1

The results therefore indicated that only a few people travelled to Nottingham with visiting spectators and then did something else other than watching the match. The most popular alternative activity was shopping, with single respondents mentioning that other members of their party were walking by the river or visiting a restaurant.

Expenditures

Respondents were asked which items their parties had purchased inside and outside the ground in the course of their visit, and how much they had spent or expected to spend on these items on the day of the survey.

The survey revealed that 94% of visiting parties were spending at least some money inside the ground, with an average total of £98 per party or £24 per individual, with more than 50% of this expenditure being on drinks.

Table A9: Expenditures inside Trent Bridge

	% of groups purchasing	Average spend per party (all parties)	Average spend per person (all visitors)
Food	68%	£28.37	£6.90

Drinks	84%	£55.22	£13.43
Programmes, souvenirs, merchandise	39%	£14.56	£3.54
Other	0%	£0.00	£0.00
Total	94%	£98.15	£23.87

Table A10 compares the expenditures by different visiting groups according to where they live. In general spending inside the ground by residents of Nottingham and the East Midlands was found to be lower than for those coming from elsewhere in the UK or from overseas.

Table A10: Expenditures inside Trent Bridge, by Origin of Visitor

Item of Expenditure	Origin of visitor:				
	Nottingham	East Midlands	Elsewhere in UK	Overseas	All
Food	£4.53	£5.41	£7.68	£7.88	£6.90
Drink	£9.17	£11.22	£15.11	£11.27	£13.43
Programmes, Merchandise, Souvenirs	£2.18	£2.38	£4.14	£3.63	£3.54
Other	£0.00	£0.00	£0.00	£0.00	£0.00
Total	£15.88	£19.00	£26.93	£22.77	£23.87

Daily expenditures outside the cricket ground were slightly lower, at an average of £92 per party and £22 per spectator. One of the reasons for this is that only just over two thirds of parties spent any money at all outside the ground, with many not lingering in Nottingham before or after the cricket. The largest expenditures were on accommodation, followed by meals and transport (including parking) which on which the largest number of groups had spent money.

Table A11: Daily Expenditures in the Region, outside the Ground

	% of groups purchasing	Average spend per party (all parties)	Average spend per person (all spectators)
Accommodation	14%	£37.55	£9.13
Meals	26%	£27.26	£6.63
Food from shop	7%	£2.19	£0.53
Drinks	14%	£10.16	£2.47

Transport	41%	£12.62	£3.07
Goods	4%	£1.32	£0.32
Other	1%	£0.82	£0.20
All	68%	£91.92	£22.36

Average spending was much higher for visitors outside the region, and especially overseas visitors who spent an average of £77 per person outside the ground on the day of the match. Highest expenditures for overseas visitors were on accommodation and meals.

Table A13: Average Daily Expenditures outside Ground, by Origin of Visitor (£ per spectator)

Item of spend:	Origin of Visitors:				
	Nottingham	East Midlands	Elsewhere in UK	Overseas	All
Accommodation	£0.00	£1.25	£9.26	£45.76	£9.13
Meals	£2.01	£2.07	£8.41	£10.92	£6.63
Food from shop	£0.52	£0.34	£0.44	£2.00	£0.53
Drinks	£2.72	£1.20	£2.19	£8.38	£2.47
Transport	£0.56	£2.15	£3.34	£7.34	£3.07
Goods	£0.53	£0.09	£0.19	£1.83	£0.32
Other	£0.00	£0.26	£0.10	£1.25	£0.20
Total	£6.33	£7.36	£23.93	£77.48	£22.36

Similarly, average daily expenditures outside the ground were much higher for overnight visitors than for day trippers (Table A14).

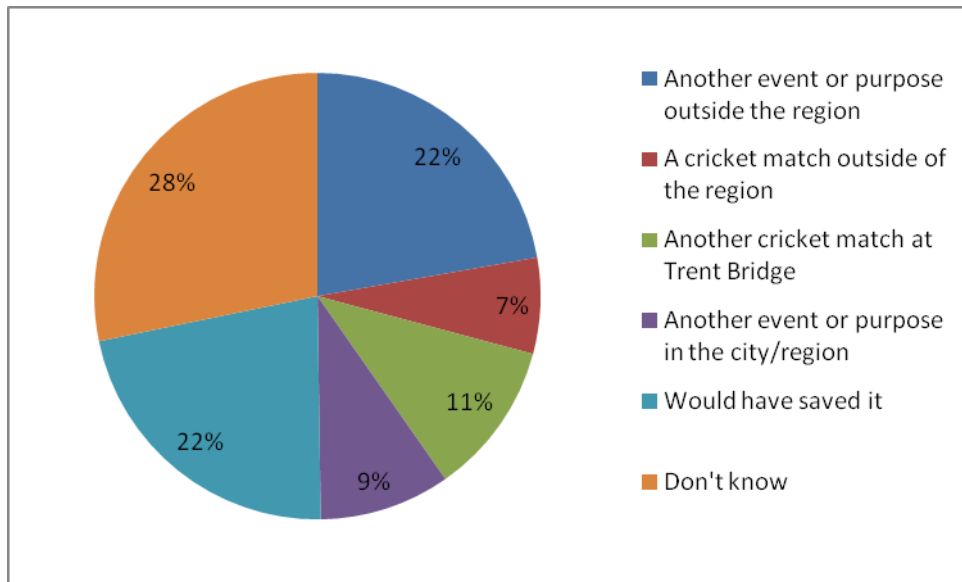
Table A14: Average Daily Expenditures outside Ground for Day-trippers and Overnight Visitors (£ per spectator)

	Day trippers	Overnight visitors	All
Accommodation	£0.00	£39.75	£9.13
Meals	£2.44	£20.67	£6.63
Food from shop	£0.31	£1.27	£0.53
Drinks	£1.57	£5.51	£2.47
Transport	£2.92	£3.58	£3.07

Goods	£0.15	£0.88	£0.32
Other	£0.07	£0.65	£0.20
Total	£7.45	£72.33	£22.36

Respondents were also asked what they thought they might have done with the money they spent if they had not attended the tournament. This question elicited a variety of responses. Some 22% of respondents thought they would have saved the money, indicating that, in the short term at least, the event may have helped to boost aggregate levels of expenditure (and not just the distribution of expenditure).

Figure A5: What Respondents would have done with the Money Spent if they had not attended the T20 Tournament



Number of T20 Matches Attended

Finally, interviewees were asked how many days of play they were attending at different venues during the course of the Twenty 20 tournament as a whole. In all, respondents planned to attend 790 days of play, including the current one, an average of 1.8 per respondent. On average, interviewees planned to attend an extra 0.5 days of play each at Trent Bridge during the tournament, in addition to the day on which they were interviewed (Table A15).

Table A15: Number of ICC World T20 Days Play Attended at Different Venues

	Total days	Average per Respondent
Trent Bridge	650	1.50
Lord's	90	0.21
The Oval	50	0.12

Total	790	1.83
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Assessing attributable visitor spending

Assessing the economic impact of the ICC World Twenty20 tournament requires an estimate of the additional visitor expenditure that the tournament brings into the city of Nottingham and the East Midlands region.

This in turn depends on:

- The numbers and spending of visitors coming from outside Nottingham and the East Midlands, as only these visitors are considered to bring additional spending to the local and regional economies
- The number of nights spent in Nottingham and the East Midlands
- The role of the event in motivating people to visit the region, in particular whether spectators came especially to see the tournament or whether other factors also influenced their visit
- The number of days play attended. Because the analysis estimates trip expenditures for staying visitors, it is important to take account of multiple visits to the ground and to avoid double counting their expenditures.

Total spending can be estimated by combining data on numbers of spectators with estimates of average attributable expenditure. To facilitate assessments of expenditures by visitors from outside the city and region, it is helpful to segment visitor numbers and expenditures according to the origin of visitors (Nottingham, elsewhere in East Midlands, elsewhere in UK, overseas).

The assessment of expenditures within and outside the ground is treated in turn.

Expenditures inside Trent Bridge

Expenditures within the ground can simply be estimated from average expenditures per spectator, which are estimated as follows (Table A16).

Table A16: Estimated Expenditures per Spectator inside Trent Bridge, by Origin

	£/spectator
Nottingham	£15.88
East Midlands	£19.00
Elsewhere in UK	£26.93
Overseas	£22.77
All	£23.87

According to UK Sport methodology and accepted practice in economic impact assessment, only expenditures by spectators from outside Nottingham and the East Midlands should be regarded as bringing additional revenues to these economies.

Care is needed in the analysis to avoid double counting these expenditures with other figures provided by Nottinghamshire CCC, regarding expenditures inside the ground.

Expenditures outside Trent Bridge

The following approach has been taken in assessing the additional expenditure brought by the ICC World Twenty20 event to the Nottingham and East Midlands economies:

- **Total daily spending** in the region, outside the ground, by visiting parties responding to the survey amounts to £39,707. This is an average of £22.36 per individual spectator.
- Allowing for multiple nights spent in the region, **the total regional trip spending** by visiting parties in the sample amounts to £83,127. This is estimated by multiplying daily off-site spending by the number of nights spent in the region.
- The **total attributable trip spending** is estimated at £80,542 for the sample as a whole. This is estimated by including all trip expenditures by interviewees who stated that their visit was solely motivated by the tournament and one third of trip expenditures for those who stated that the tournament was “one of the reasons” for their visit.
- The **total attributable trip spending per match day** was estimated at £54,193 for the sample, by adjusting for respondents who were attending more than one T20 match. This was estimated by dividing the attributable trip spending for those parties staying in the region by the number of days play they had come to see. It is equivalent to an average of £30.51 per spectator.

The resulting estimates of attributable spending per visitor are given in Table A17.

Table A17: Attributable Spend per Spectator Day

	Total Attributable Spend, Sample	£/spectator
Nottingham	£416	£2.11
East Midlands	£2,607	£7.51
Elsewhere in UK	£33,925	£30.51
Overseas	£17,245	£143.71
All	£54,193	£30.51

The estimated attributable average spending per visitor for each group can be combined with estimates of the total number of spectators at the tournament to estimate total additional visitor spending.

ANNEX 2: QUESTIONNAIRE FOR SPECTATOR SURVEY

ICC WORLD TWENTY20 – VISITOR SURVEY

We are conducting a survey of visitors to the ICC World Twenty20 tournament at Trent Bridge, in order to understand the benefits that the tournament has brought to Nottingham and the East Midlands region. Please could you help us by answering a few questions? It should take no more than five minutes of your time.

[If asked the survey has been commissioned by the East Midlands Development Agency with the support of Nottinghamshire County Cricket Club, the England and Wales Cricket Board and the International Cricket Council]

1. Please could you start by telling me where you live?

- Nottingham (City) **[Go to Q10]**
- Elsewhere in East Midlands (Notts, Leics, Derbs, Northants, Lincs).....
Please specify.....
- Elsewhere in UK.... (Please specify).....
- Overseas..... (Please specify).....

2. Was the match.....

- Your only reason for visiting Nottingham today
- One of the reasons for your visit to Nottingham, but not the only reason....
- Not an influence on your visit, because you were planning to be in Nottingham anyway.....

3. Does your visit to Trent Bridge involve?

- A day trip from home **[Go to Q7]**
- An overnight stay.....**[Go to Q4]**

4. Please can you tell me where you stayed/are staying?

- Nottingham.....
- Elsewhere in East Midlands (Notts, Leics, Derbs, Northants, Lincs).....Please specify....
- Elsewhere in UK....Please specify..

5. What type of accommodation are you using?

- Hotel
- B&B
- Self catering
- Camping/caravan
- Visiting friends/relatives
- Other _____

6. Over the course of the ICC World Twenty20 tournament as a whole, please can you tell me how many nights are you planning to spend?

- In Nottingham _____
- In the East Midlands _____
- Elsewhere in the UK.. _____

7. If you come from outside the East Midlands region, do you have any comments about Nottingham or the East Midlands as a result of your visit? i.e. What are your impressions?

8. Has your experience from this visit to Nottingham and the East Midlands made you more or less likely come back to the region? (NB This question is not just about the Trent Bridge cricket ground)

- More likely to return...
- Less likely to return....
- This visit has not affected my likelihood of returning to the region....

9. Has your experience from this visit to Nottingham and the East Midlands made you more or less likely than before to recommend the region to others?

- More likely to recommend...
- Less likely to recommend....
- This visit has not affected my likelihood of recommending the region....

10. How many people are in your party visiting Nottingham today?

11. How many people in your party have come to watch the match today?

If not all of the party are watching the match, what are the others doing?

12. Please can you tell me, which of each of these items your party have bought or plan to buy *in the ground* today, and approximately how much you think you and your party will be spending on each item today?

	Have bought/ Plan to buy	
	√	£
Food		
Drinks		
Programmes, Merchandise, Souvenirs		
Other		
Total spent		

13. Please can you tell me, which of each of these items your party have bought or plan to buy outside the ground today, and approximately how much you think you and your party will be spending on each item today?

	Have bought/ Plan to buy	
	√	£
Accommodation		per night*
Meals		
Food from shop		
Drinks		
Transport/petrol		
Merchandise, Souvenirs		
Other		
Total spent		

*[*Please note that we are interested in the daily cost of accommodation for all staying visitors, whether or not they are paying for accommodation today]*

14. If you had not spent the money you have spent attending the ICC World Twenty20 tournament, where do you think you would have spent it:

- Another cricket match at Trent Bridge _____
- Another event or purpose in the city/region _____
- A cricket match outside of the region _____
- Another event or purpose outside the region _____
- Would have saved it _____
- Don't know _____

15. In all, how many matches are you planning to attend at the Twenty20 tournament:

- At Trent Bridge _____
- At Lord's _____
- At the Oval _____
- In total _____

THANK YOU FOR TAKING PART IN THE SURVEY

ANNEX 3: STRATEGIC ADDED VALUE STAKEHOLDER SURVEY

		Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree	Brief explanation and examples to support the rating (to be drawn from main interview where applicable)
	Strategic / Catalytic Role						
1	... set out a clear vision for promoting economic development in the region through sport	1	2	3	4	5	
2	...supported appropriate interventions for delivering this vision	1	2	3	4	5	
3	...levered in additional investment, funding and resources	1	2	3	4	5	
4	... contributed to the development of new ideas or approaches	1	2	3	4	5	
5	... shaped a more strategic way of thinking	1	2	3	4	5	
6	... encouraged engagement in regional strategy/policy	1	2	3	4	5	
	Coordination , Alignment and Partnership						
7	... facilitated greater partnership working	1	2	3	4	5	
8	...achieved synergies with other relevant initiatives	1	2	3	4	5	
9	...promoted sharing of regional intelligence	1	2	3	4	5	
	Influence and Awareness Raising						
10	...influenced the spend and activities of partners (both public and private)	1	2	3	4	5	

		Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree	Brief explanation and examples to support the rating (<i>to be drawn from main interview where applicable</i>)
11	...enhanced the quality of the project and the activities supported	1	2	3	4	5	
12	... helped to inspire confidence in the prospects for sport to contribute to economic growth in the region	1	2	3	4	5	
13	... helped to increase the profile and raised awareness of the region	1	2	3	4	5	
14	... promoted good practice in scaling up beneficial activities?	1	2	3	4	5	

ANNEX 4: SURVEY OF LOCAL BUSINESSES

Introduction

The purpose of the business survey was to provide an understanding of the types and scale of impact the Twenty20 Tournament had on local businesses. The survey is intended to be used as an illustration of how the tournament affected businesses in close proximity to Trent Bridge. Two key issues were discussed with businesses:

3. What increased employment and profits resulted from the tournament?
4. What other impacts have resulted from the tournament

The survey covered thirteen of the fifteen companies who attended a pre-tournament consultation event at Rushcliffe Borough Council. The consultation event was held in order to explain how the tournament would function and the potential impact on local businesses. Businesses used the event to gather information for planning purposes.

The Sample profile

Table A.18 presents a profile of our survey sample. All companies were interviewed by telephone between 20 July 2009 and 30 July 2009.

Table A.18: Survey Sample

Type of Business	Location	No. of Employees
Hotel	Easthorpe Street	20
Public House	Stratford Road	25
Public House	Gordon House	20
Bar and Restaurant	Bridgford Road	24
Wine Bar	Central Avenue	15
Restaurant	Bridgford Road	4
Public House	Bridgford Road	20
Public House	Pavilion Road	15
Restaurant	Central Avenue	10
Taxi Company	Pavilion Road	10
Restaurant	Bridgford Road	32
Coffee Bar	Central Avenue	5
Coffee Bar	Tudor Square	6

Impacts on local businesses

Positive

Just over half of the businesses surveyed stated that the tournament brought an increase in trade. One interviewee stated that the scale of the increase in turnover was dependent on which teams were playing at Trent Bridge. For example when India and Bangladesh were playing there was no extra business in public houses as generally there is less of a drinking culture amongst their nationalities. However when England or Ireland were playing there was £500-£1,000 in additional revenue compared to a normal day of trading.

Whilst the impact of the tournament on Public Houses appears to have been significant, our survey suggested it was less beneficial to restaurants and coffee shops. One of the restaurants surveyed noted only a slight increase in trade, but they also stated that visitors were not spending more per party than local trade. They remarked that this was unusual as

their normal experience from Test match and ODI games is that parties visiting for matches at Trent Bridge usually spend more per party than Nottingham residents.

Furthermore another noted a slight increase in trade which included Nottingham residents who had not been to Bridgford previously, because they had not been to cricket matches at Trent Bridge before and were used to socialising in the city centre. The business hopes that this will be beneficial for both themselves and surrounding businesses over the longer term.

Negative

One clear impact on businesses who took part in the survey was displacement of existing trade. This appears common to both restaurants and public houses. Several commented that local customers stayed away from the tournament. The landlord believes that this was because regulars thought it would be too busy. In addition it was thought that locals stayed away during the tournament was because parking was taken up by visitors, the situation was chaotic and dangerous at times, with cars blocking entrances.

Some businesses stated that expected trade did not materialise and that there seemed to be a tendency for people to go straight home rather than stay for a meal or drinks. Considered alongside displacement of trade from regulars there was a negative impact on profit for some businesses.

Neutral

One hotel located 1 to 2 miles away from Trent Bridge saw no significant benefit from the tournament, with a negligible increase in trade and only one guest staying who was attending matches at Trent Bridge. In addition a coffee house located at the end of The Central Avenue said he saw customers reach coffee shops that were at the closer end to the cricket ground and they didn't venture any further.

Furthermore as stated above, the fact that locals stayed away from the city centre and were replaced by a modest stream of visitors, who were not spending more per party than their regular trade, meant that it was more or less a zero sum game for most businesses with little or no impact on revenue.

Extra revenue generated

Some businesses were unwilling or unable to supply data relating to the increased revenue which they would attribute to the impact of visitors in Nottingham for the Twenty20 Tournament. Table A.19 below presents the available information.

Table A.19: Estimates of Additional Revenue Attributable to the T20 Tournament

Type of Business	Increased Revenue	Increased Revenue
Hotel	No	N/A
Public House	Yes	£2,500
Public House	No	N/A
Bar and Restaurant	Yes	£3,000
Wine Bar	Yes	£2,000
Restaurant	No	N/A
Public House	Yes	£2,000
Public House	Yes	Don't know*
Restaurant	No	N/A
Taxi Company	Yes	Don't know
Restaurant	Yes	£500
Coffee Bar	Yes	£500
Coffee Bar	No	N/A

* Whilst this interviewee estimated additional revenue to be double the normal weekday, it was considered much less than a ODI or Test Match.

Extra employment

Extra employment attributed to the tournament was a feature in public houses rather than restaurants. This additional employment took the form of increased hours of work for existing staff, with only one interviewee creating a new temporary post for the tournament.

For one Public House extra employment was estimated at 30-40 man hours across the duration of the tournament. One other public house stated that at times they were slightly busier, but it did not necessitate additional employment. For another public house extra employment resulted in 24 extra man hours across the tournament. This extra employment doubled the wage bill for the business for match days.

Another Public House estimated additional employment to be approximately 30 extra hours per week. This was mainly made up of additional hours given to existing staff before games. One additional person was employed on a temporary basis in order to assist with the preparation of food before matches.

A general observation made by a few interviewees was that trade was much lower than expected after matches, meant that additional employment was much lower than they expected it would be in the build up to the tournament.

Scale of economic impact

Some businesses were unwilling or unable to supply data relating to the purchase of additional supplies. Table A.20 below presents the available information.

Table A.20: Purchase of Additional Supplies

Type of Business	Value of Additional Purchases (£)	% of Purchases in East Midlands	% of Purchases outside of the East Midlands
Hotel	None	N/A	N/A
Public House	150	90	10
Public House	0	N/A	N/A
Bar and Restaurant	0	N/A	N/A
Wine Bar	0	N/A	N/A
Restaurant	1,000	100	0
Public House	500	50	50
Public House	750	100	0
Restaurant	0	N/A	N/A
Taxi Company	Don't know	100	0
Restaurant	250	0	100
Coffee Bar	Don't know	0	100
Coffee Bar	0	N/A	N/A

Interestingly, one of the public houses surveyed did not make any additional purchases as a result of the tournament in Nottingham, but they did change their suppliers, stocking Pepsi for the duration of the tournament to fit in with the tournament branding.

It should also be noted that not all of this additional purchase value was positive. One restaurant owner spent approximately £1,000 on supplies in anticipation of extra business which did not materialise. In addition he noted that local bars were reducing the cost of

drinks throughout the tournament, having previously inflated them expecting to make large profits.

The impact of the Twenty20 on Nottingham and the East Midlands

Business perceptions

Some expressed the view that the tournament was an excellent event for the city's image and obviously a bonus for Trent Bridge, but not necessarily good for businesses who were not located in near proximity to the venue. One interviewee located 1 to 2 miles outside of the city centre did not benefit from the tournament and was disappointed that more effort wasn't made to encourage visitors to stay and explore the area.

How was the experience compared to a Test Match / ODI?

There was general consensus that the T20 Tournament was not nearly as beneficial for local restaurants and bars than Test Matches or ODIs have been in the past. Many interviewees stated that they felt visitors came into the city and went home straight after the matches. Possible reasons given for this were;

- "The crowd of spectators seemed younger, perhaps they are not used to going out for a meal after a cricket match"
- "The matches finished too late, people are more likely to go out after a Test finishing at 6.30pm than 9.30pm after the Twenty20"
- "The Test Match format makes it more likely that people will stay overnight, so there is no rush to get away. Conversely the Twenty20 seemed to be more like a football crowd on a rampage to get to their cars or the train station"
-

Any other information / How could impact on your business have been greater?

The focus of Experience Nottingham should be widened so that it includes areas outside of the city centre; the focus on the city centre downplays the quality of the visitor offer that exists out of town. The surrounding countryside could serve as a more attractive base for visitors, potentially increasing the length of their stay. One restaurateur commented that it could have put more effort into marketing itself and perhaps worked more closely with the cricket ground distributing vouchers or something similar and will keep this in mind for future events.

The tournament raised the profile of Nottingham and visitors would have left with a very positive impression of the city. In addition a great atmosphere was evident during the tournament and the city was 'vibrant and busy' However, revenue was not as high as expected and increased turnover resulting from Nottingham Forest matches is far higher than that witnessed from the international matches staged during the tournament.

One landlord felt that overall the tournament was extremely beneficial, not necessarily for his business, but very positive for the image of the city and gave locals a sense of pride that their city was staging a globally significant event.

In recent years Nottingham has suffered from its poor image. Events such as the Twenty20 Tournament help to challenge assumptions about the city and the real value of the tournament may be way beyond any immediate benefit to NCCC or local companies. In general the atmosphere in the city was tremendous. A general comment was that organisers did a very good job with the street decoration and visitors commented that they were impressed with Nottingham and would recommend it, and particularly would

recommend West Bridgford which was highlighted as an area with a separate cultural and entertainment offer.

Reflections on Business Survey Findings

The findings of the business survey may at first appear slightly contradictory to our impact assessment analysis, suggesting that the impact on local traders was not high.

However we would suggest that:

1. Expenses outside of the ground were widely dispersed, and so not necessarily likely to have a huge local impact, indeed the largest cost for visiting parties is accommodation. Our sample was mainly made up of public houses and restaurants.
2. More than half of those businesses interviewed reported an increase in turnover during the tournament. It is possible that the increases were higher than those reported to us.
3. The sample of local businesses attended a pre-tournament organised by Rushcliffe Borough Council. It is possible that expectations of high returns from visitors to Nottingham were raised, and the actual returns, although significant, were not as high as may have been expected.