



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

Findings Report

October 12, 2023





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Adapted Sport: Economic Impact Study

GOAL

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

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



Adapted Sport: Economic Impact Study

CONTEXT & METHOD

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

- + Surveys were emailed to **256 contacts representing 189 organizations**.
- + Fieldwork was conducted between August 15 – September 25, 2023.
- + **44 organizations'** economic profiles are represented in the following report, including **partial and complete survey responses**. (22 completes, 22 partials)



CHALLENGES

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

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





How do we interpret this data?

The benchmark study is an ongoing project that provides a benchmark of the economic impact of the adapted sport movement in the U.S. The first study was done in 2020, reflecting activity from 2019. This year's study reflects activity from 2022.

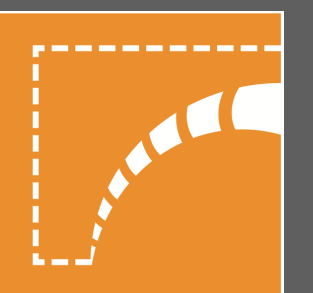
- + While the data collected is not comprehensive of all organizations, it sheds light on directional trends of the adapted sport industry and is a sampling.
- + This data is representative of the participating organizations and is not an exact projection of the total market.
- + Partial survey responses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



Respondent Profile

Organization type

Organizational role



Role in the Organization

Respondent roles skewed more heavily toward executive leadership roles this year compared to previous years.

“Something else” roles include, for example:

*Director of Strategic Partnerships
Para High Performance Director
Staff
Coach*

12
%

Portion of board members who identify as having a disability.

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

Respondent Role	2023	2022	2020
Executive Director	28%	23%	40%
Program Manager	16%	17%	7%
Program Director	25%	13%	18%
Executive/Leadership Team	28%	11%	12%
Board Member	13%	9%	9%
Founder	9%	9%	21%
Development/Fundraising	3%	8%	5%
Something else	16%	9%	21%

[n=52, 2023]

[n=36, 2022]

[n=55, 2020]



Number of Employees

Approximately how many full-time, part-time and/or contract employees did your company have in 2022?

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

Like last year, responding organizations this year note that a majority of their employees are Full-time employees.

An average of 17% of all staff identify as having a disability.

Number of Employees	%	% who identify as having a disability
Full-time	49%	17%
Part-time	42%	15%
Contractors	9%	29%

[n=32]



Organization Types

A majority of organizations are nonprofits, some partnering with other categories.

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

Organization Type	2023	2022	2020
Nonprofit	91%	64%	82%
Municipal/County Parks & Recreation	0%	10%	9%
NGB	12%	10%	5%
Program within a university	9%	5%	5%
Program within a healthcare system/rehab hospital	3%	5%	2%
Other (please specify)	6%	7%	7%

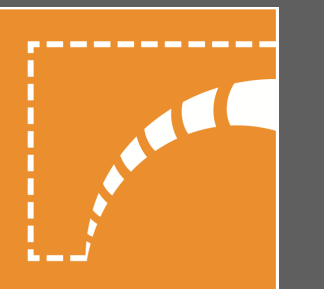
[n=40, 2023]
 [n=42, 2022]
 [n=55, 2020]



Organization Financial Profile

Revenue estimates

Projections



Adapted Sport Organization Revenue 2022

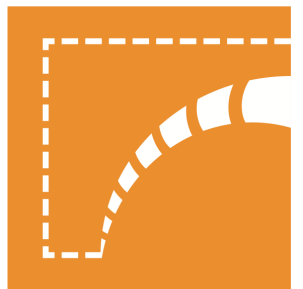
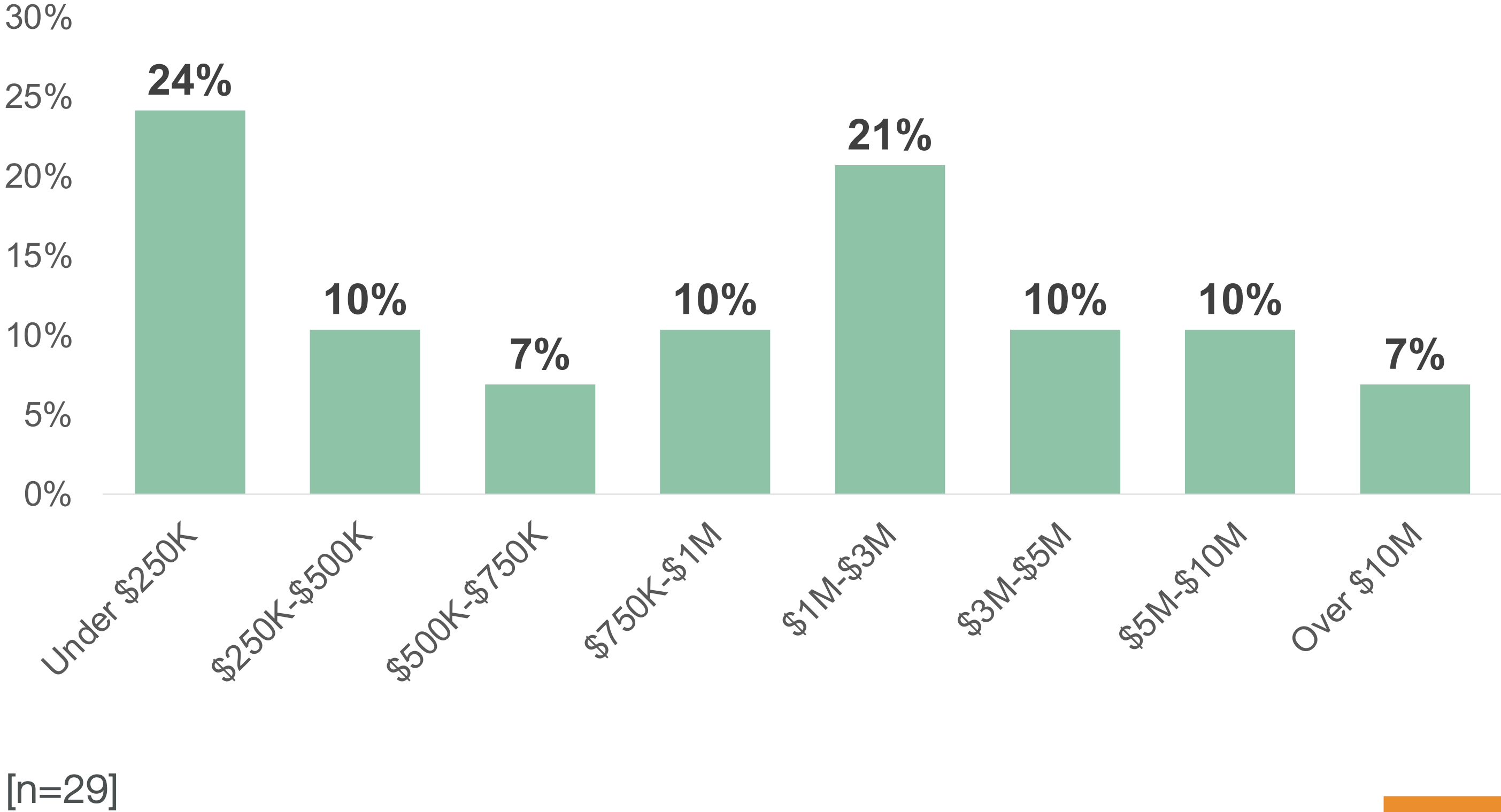
Which of the following categories includes your organization's revenue for calendar year 2022 (or fiscal equivalent)?

This year, 24% of responding organizations in this survey operate at under \$250K in annual revenue.

Just over half (52%) operate at less than \$1M in annual revenue.

Just under half (48%) operate at more than \$1M in annual revenue. Last year, one-third of respondents operated at this revenue level.

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



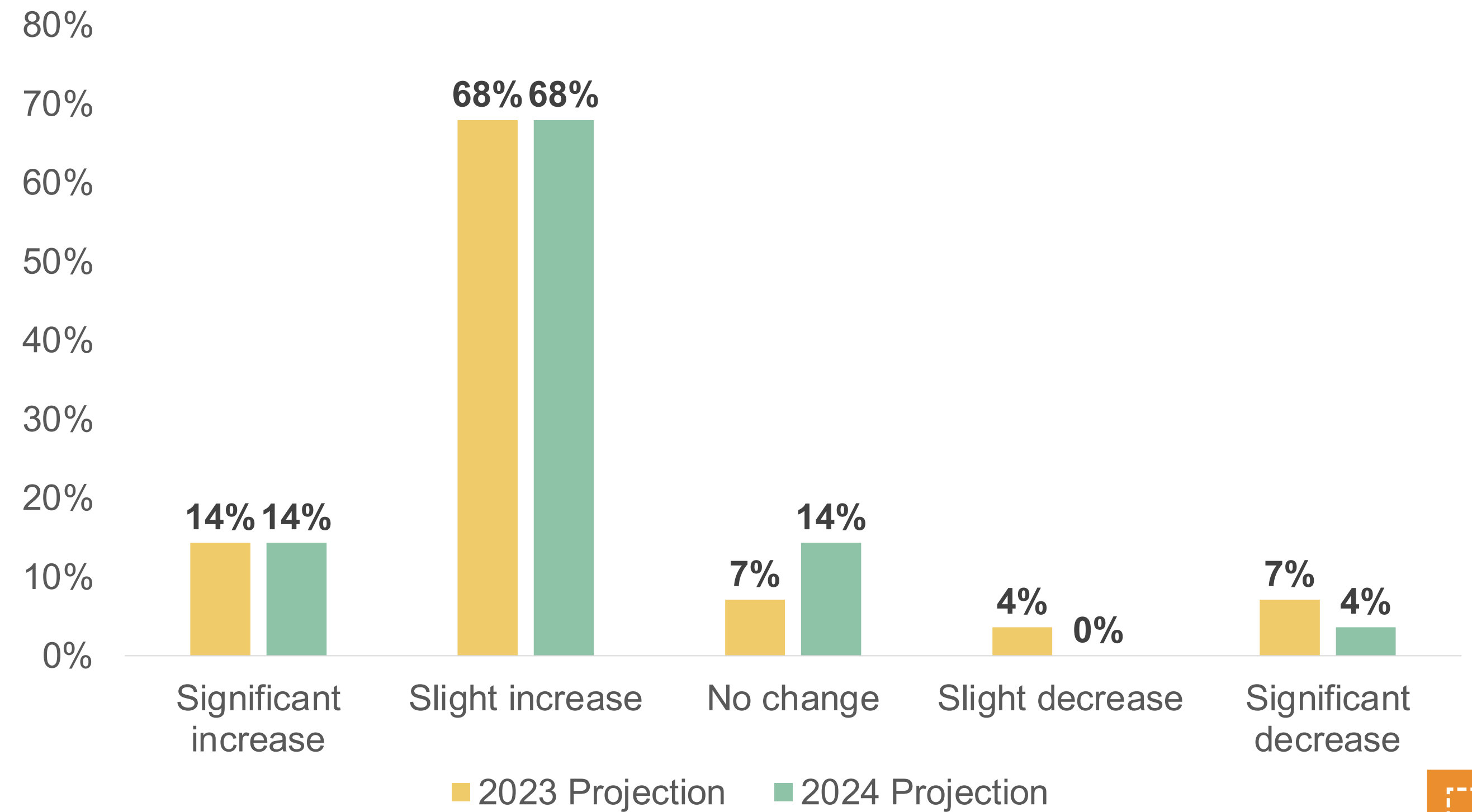
Revenue Projections in 2023 and 2024

With fieldwork conducted more than halfway through 2023, leadership anticipates the year's revenue to be increased over 2022.

Forecasts for 2024 are also optimistic, with respondents predicting slight to significant increases in revenue in the upcoming year.

Organizations are continuing to recover from COVID shutdowns.

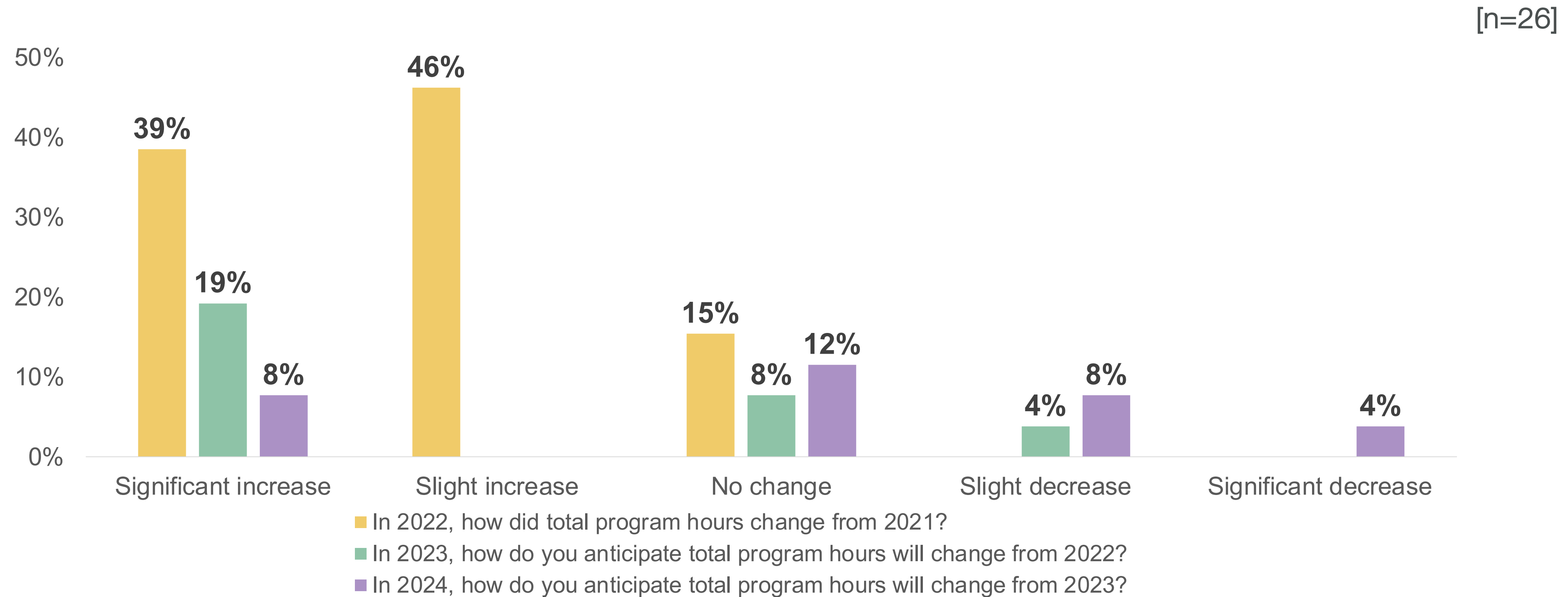
In 2023/Looking ahead to 2024, what do you anticipate will be the change in revenue results versus 2021/2022 (total contributions, program revenue, etc.)...?



[n=28]



Program Hour Projections 2023 and 2024



Similar to revenue trends, leadership predicts increased hours for the 2023 year, and forecasts a mix of changes in 2024.

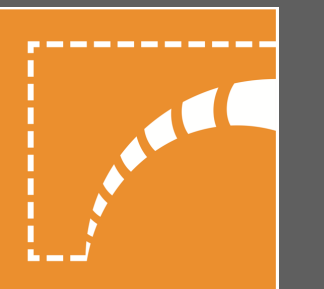


Event Profile

Event profile – number, length, type

Participants, spectators, athletes

Staff, volunteers



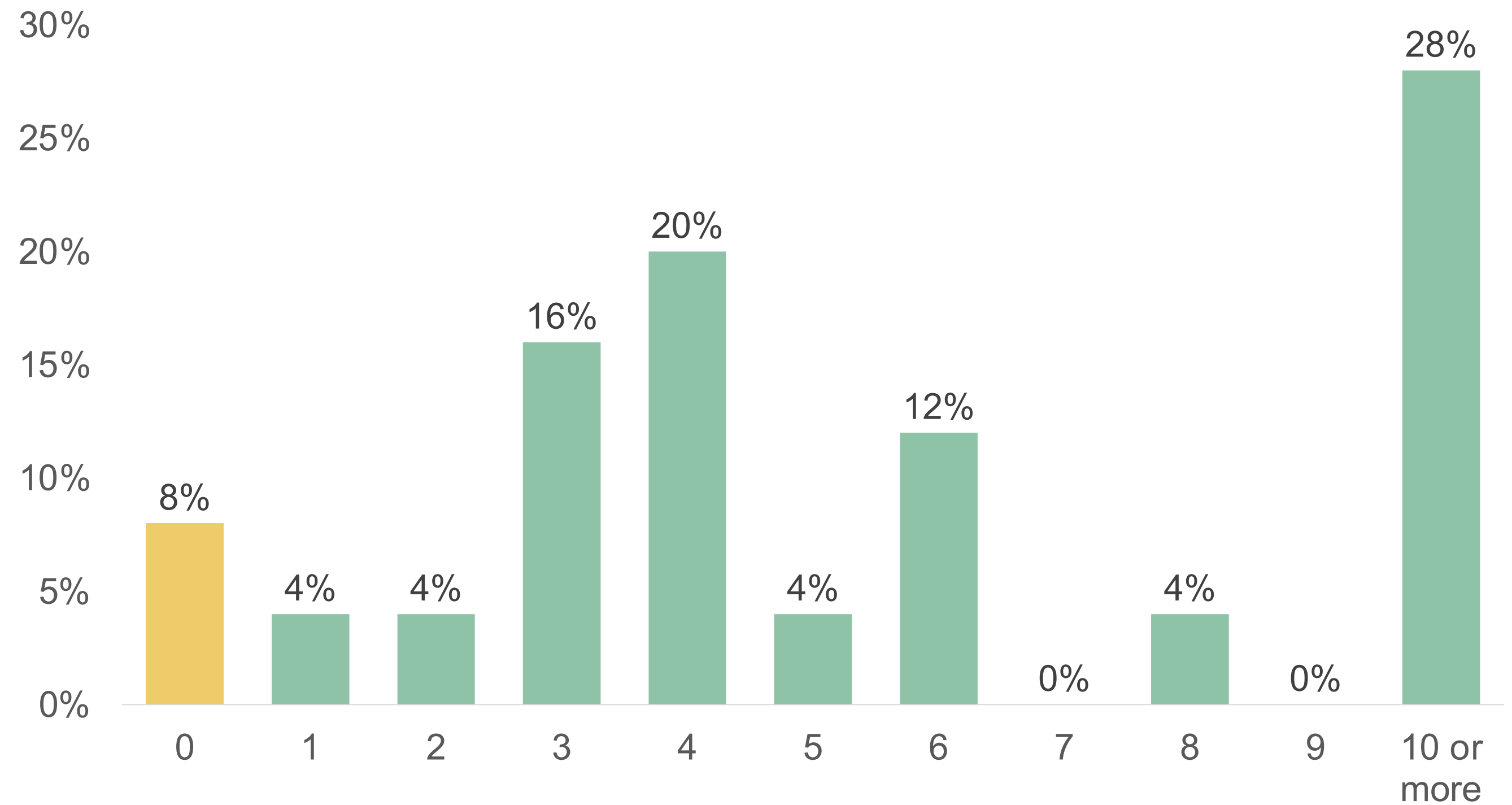
Number of Events

Total Estimated Events: 136

A greater number of responding organizations had 10 or more events this year over last year (28% vs. 17%).

Fewer organizations had 0 events this year compared to last year (8% vs. 13%).

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



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

[n=24]

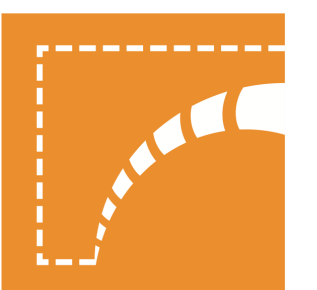
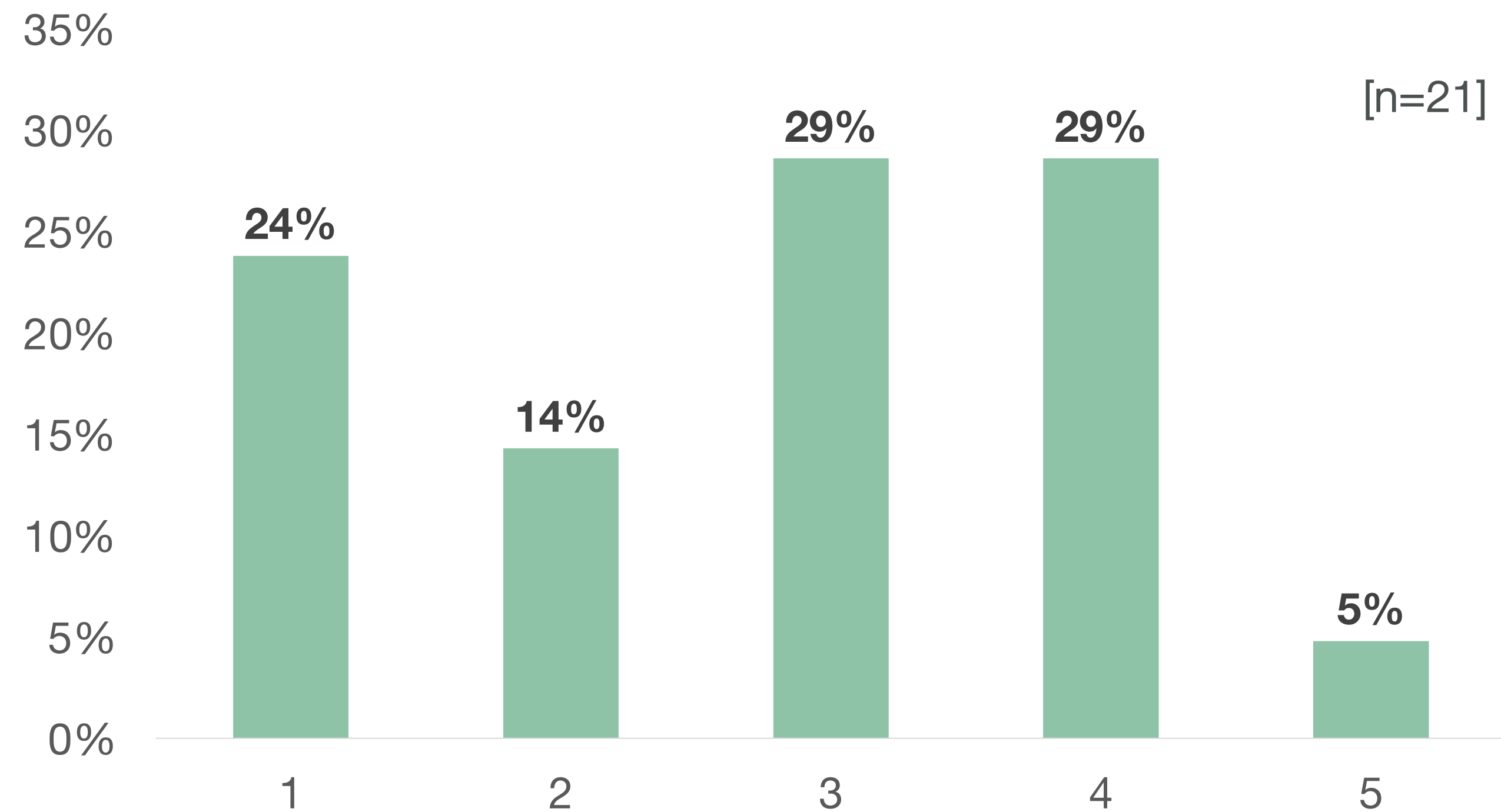


Events – Length

Total Estimated Days of Events: 282

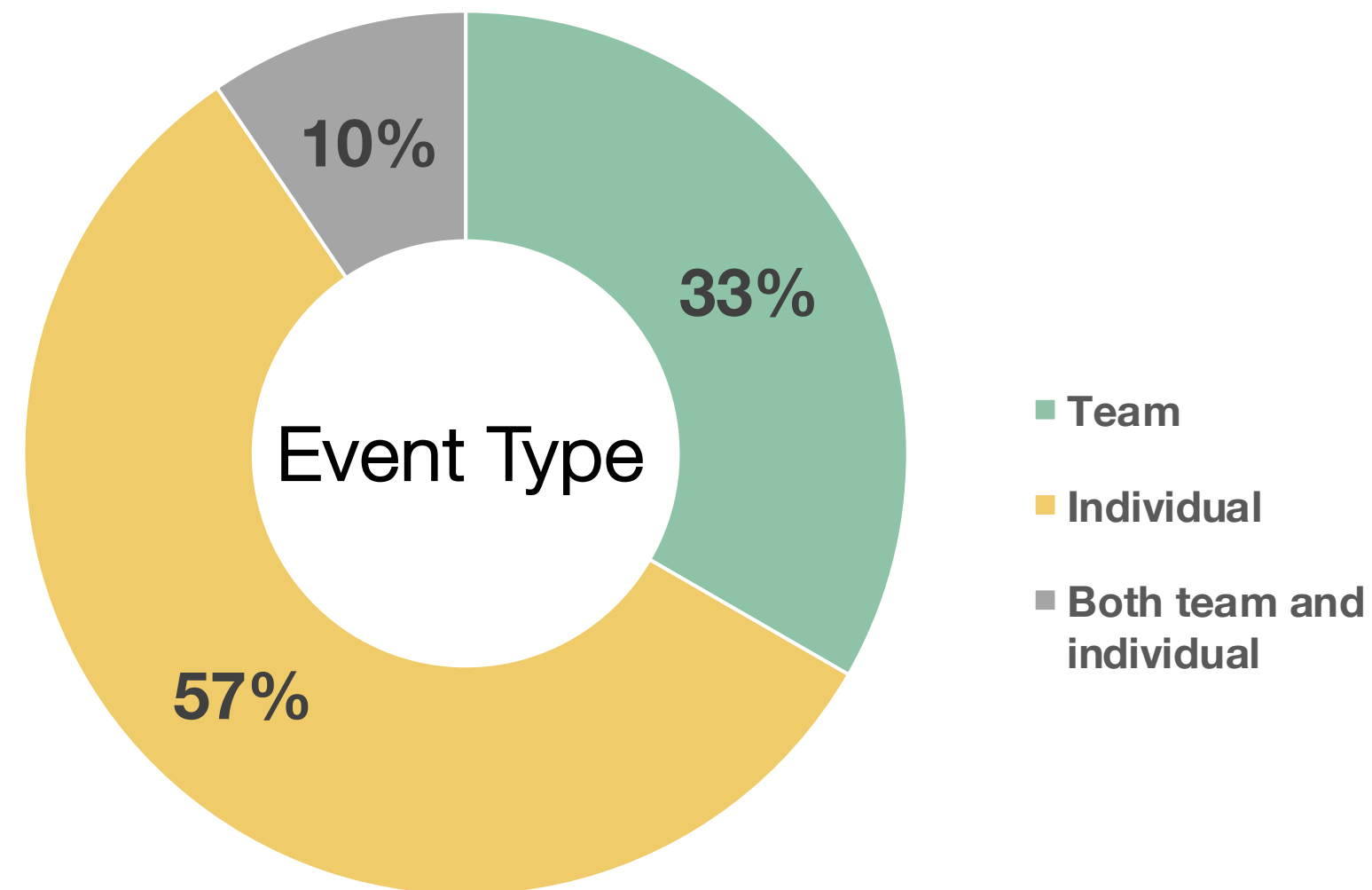
Event duration is spread out fairly evenly between 1, 3, and 4-day events.

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



Events – Participants

Total Estimated Event Participants: 36,665 participants

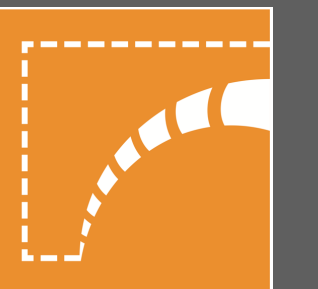


Event Participants	
Athletes, Coaches	11,360
Event administrators (e.g., referees/officials, event workers, volunteers)	5,424
Spectators	19,881
Total Participants	36,665

Total participants are calculated based on organization responses. Estimates based on athletes per team are included, with additional participants as listed above from 25 organizations.



Para Events Economic Impact



Para Events Economic Impact – 2023

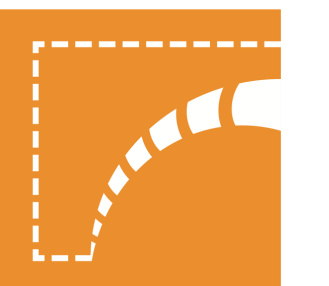
Para Events Economic Impact: \$10,761,061*

Organizations completing the survey account for approximately 20% of the total number of adapted sport organizations in the U.S. market.

Economic Impact is calculated using 2019 EI survey data from Sports & Events Tourism Association or SportsETA.

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

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



Para Events Total Economic Impact – 2023

Para Events Total Economic Impact: \$139,151,651

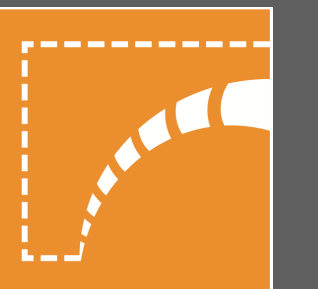
Calculations and total economic impact estimates were made for the adapted sport community based on the completed surveys.

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

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



Key Learnings





Market Landscape Report

Key Learnings



We have to take the lead in understanding our market value to host destinations and our industry's role in Economic Impact.




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

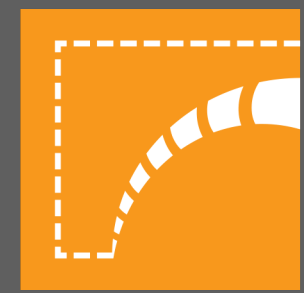


The overall goal being to create a better infrastructure for our athletes and events while increasing disability awareness and community-wide inclusion through sport.





Q & A



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