



IFM Sports Marketing Surveys

quality research for management action

**The 2010 Ryder Cup
The Celtic Manor Resort
Newport, Wales**

**Economic Impact Assessment
March 2011**



Table of Contents

<u>1. Introduction</u>	1
<u>2. Executive Summary</u>	2
2.1. Background	2
2.2. The Economic Impact of The 2010 Ryder Cup	4
2.3. The Research Programme	6
2.4. The 2010 Ryder Cup	8
2.4.1. Spectators	8
2.4.2. Hospitality	10
2.4.3. Volunteers	11
2.4.4. Contractors & Infrastructure	11
2.5. Factors Affecting the Economic Impact	12
<u>3. Scope, Expenditure Groups & Methodology of the Study</u>	13
3.1. Scope of The 2010 Ryder Cup EIA	13
3.2. Expenditure Groups	15
3.3. Methodology	16
3.3.1. Data Collection	16
3.3.2. Factors included within the Economic Impact Calculations	17
3.3.3. Economic Impact Calculation Outputs	23
3.3.4. Gross Expenditure and Direct Economic Impact	24
<u>4. Detailed Expenditure Analysis</u>	26
4.1. Introduction	26
4.2. Overall Economic Impact Estimates	27
4.3. Spectator Expenditure	30
4.3.1. Spectator Profile	30
4.3.2. Spectator Market Sizing and Segmentation	32
4.3.3. On-Site Expenditure at The 2010 Ryder Cup	36
4.3.4. Local Travel Expenditure During The 2010 Ryder Cup	38
4.3.5. Off-Site Expenditure During The 2010 Ryder Cup	40
4.3.6. Extended Stay Expenditure Pre- or Post-Ryder Cup	43
4.3.7. Total Spectator Expenditure	45

The 2010 Ryder Cup – Economic Impact Assessment

4.4.	Hospitality Expenditure	47
4.4.1.	Corporate Hospitality Market Sizing & Segmentation	47
4.4.2.	Corporate Hospitality Expenditure & Economic Impact	50
4.5.	Volunteer Expenditure	53
4.5.1.	Volunteer Profile	53
4.5.2.	Volunteer Market Segmentation and Sizing	55
4.5.3.	On-Site Volunteer Expenditure at The 2010 Ryder Cup	57
4.5.4.	Local Transport Expenditure During The 2010 Ryder Cup	59
4.5.5.	Off-Site Expenditure During The 2010 Ryder Cup	60
4.5.6.	Extended Stay Expenditure Pre- or Post-Ryder Cup	62
4.5.7.	Total Volunteer Expenditure	64
4.6.	Contractors Expenditure	67
4.7.	Media Expenditure	68
4.8.	Expenditure by Players & Entourage	69
5.	<u>Wider Effect of Hosting The Ryder Cup</u>	70
5.1.	Introduction	70
5.2.	Impact on the Profile and Perception of Wales	71
5.3.	Legacy for Tourism, Golf, Sports & Events	72

List of Tables

Table 1 - Summary of Economic Impact for The 2010 Ryder Cup	4
Table 2 - Direct Economic Impact of The 2010 Ryder Cup	5
Table 3 - Merchandise Vendor Origin	22
Table 4 - Estimated Leakage of Car Hire Expenditure	22
Table 5 - Wales - Breakdown of Direct Economic Impact	27
Table 6 - South East Wales - Breakdown of Direct Economic Impact	28
Table 7 - Newport - Breakdown of Direct Economic Impact	28
Table 8 - UK - Breakdown of Direct Economic Impact	29
Table 9 - Share of Ryder Cup Tickets Sold by Day and by Market	33
Table 10 - Ryder Cup Attendance by Day and Market	33
Table 11 - Ryder Cup Attendance, LOS and Market Size by Segment	35
Table 12 - Gross Spectator On-Site Expenditure	36
Table 13 - Direct Economic Impact of Spectators' On-Site Spend	36
Table 14 - Total Economic Impact of Spectators' On-Site Spend	37
Table 15 - Gross Spectator Expenditure on Local Transportation	38
Table 16 - Direct Economic Impact of Spectators' Local Transportation	39
Table 17 - Total Economic Impact of Spectators' Local Transportation	39
Table 18 - Gross Off-Site Spectator Expenditure	40
Table 19 - Direct Economic Impact of Spectator's Off-Site Spend	41
Table 20 - Total Economic Impact of Spectators' Off-Site Spend	42
Table 21 - Gross Spectator Expenditure Extended Stay	43
Table 22 - Direct Economic Impact of Extended Stays	44
Table 23 - Total Economic Impact of Spectators' Extended Stays	45
Table 24 - Summary of Spectators' Gross Expenditure	45
Table 25 - Summary of Spectators' Direct Economic Impact	46
Table 26 - Summary of Spectators' Total Economic Impact	46
Table 27 - Corporate Guests Admissions & Attendance by Pavilion	48
Table 28 - Corporate Guests by Pavilion and Region of Origin	48
Table 29 - Corporate Staff Admissions & Attendance by Pavilion	49
Table 30 - Corporate Staff by Pavilion and Region of Origin	49
Table 31 - Gross Corporate Hospitality Expenditure	50
Table 32 - Direct Economic Impact of Corporate Hospitality	51
Table 33 - Total Economic Impact of Corporate Hospitality	52
Table 34 - Ryder Cup Volunteers by Source Market	55
Table 35 - Volunteer Market Sizing and Segmentation	56
Table 36 - Gross Volunteer Expenditure On-Site	57
Table 37 - Direct Economic Impact of Volunteers' On-Site Spend	57
Table 38 - Total Economic Impact of Volunteers' On-Site Spend	58

The 2010 Ryder Cup – Economic Impact Assessment

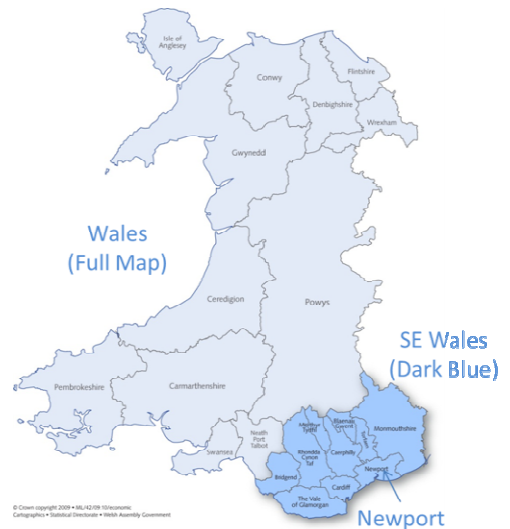
Table 39 - Gross Volunteer Expenditure on Local Transportation.....	59
Table 40 - Direct Economic Impact of Volunteers' Local Transportation	59
Table 41 - Total Economic Impact of Volunteers' Local Transportation.....	60
Table 42 - Gross Off-Site Volunteer Expenditure.....	60
Table 43 - Direct Economic Impact of Volunteers' Off-Site Spend	61
Table 44 - Total Economic Impact of Volunteers' Off-Site Spend.....	62
Table 45 - Gross Volunteer Expenditure on Extended Stays	63
Table 46 - Direct Economic Impact of Volunteers' Extended Stays.....	63
Table 47 - Total Economic Impact of Extended Stays	64
Table 48 - Summary of Volunteers' Gross Expenditure	65
Table 49 - Summary of Volunteers' Direct Economic Impact	65
Table 50 - Summary of Volunteers' Total Economic Impact.....	66
Table 51 - Summary of Contractor Spend & Impact	68

1. Introduction

Ryder Cup Europe LLP commissioned IFM Sports Marketing Surveys to conduct an Economic Impact Assessment (EIA) of The Ryder Cup, staged at The Celtic Manor Resort in Newport from Tuesday 28th September to Sunday 3rd October 2010. Due to inclement weather, the event was extended to Monday 4th October.

The report focuses on the economic impact of the standard duration of The Ryder Cup. This ensures comparability with previous Ryder Cup EIAs, with separate estimates provided on the economic impact of visitors lengthening their stay in response to the inclement weather to watch the additional Monday's play.

Generally, EIAs provide economic impact assessments for the local and national economy. A typical specification would have included a local impact assessment for Newport City Council area (where The Celtic Manor Resort is located) and a national impact assessment for Wales. However, due to the unique economic geography of the region surrounding The Celtic Manor Resort, a more comprehensive set of catchments for which economic impact calculations were provided – Newport Local Authority, South East Wales and Wales.



The 2010 Ryder Cup was attended by significant numbers of overseas spectators (18% of spectators came from outside the UK), corporate guests (18% from overseas) and volunteers (10% from outside the UK). While the expenditure of these overseas attendees has, of course, been included in our economic impact assessments relating to Newport, South East Wales and Wales overall, this expenditure also represents income to the UK as a whole and has therefore been identified as a separate stream in the presentation of our data.

2. Executive Summary

2.1. Background

The Ryder Cup is a biennial golf competition between teams from Europe and the United States. The competition is jointly administered by the PGA of America and Ryder Cup Europe LLP, and is contested every two years, the venue alternating between courses in the United States and Europe.

The 2010 Ryder Cup was hosted in the first week of October by The Celtic Manor Resort on a course, the Twenty Ten, specifically designed and built to host The Ryder Cup using the natural contours of the Usk Valley. The Celtic Manor Resort is located within the Newport City Council area in Wales. The event began with practice on Tuesday 28th September with the matches starting on Friday 1st October. The weather proved to be too wet to complete the matches in the allotted timeframe and hence the event was extended to Monday 4th October when Europe overcame The United States by the smallest of margins – 14½ to 13½.

It was recognised from the outset that for Wales to maximise the economic benefits of hosting The 2010 Ryder Cup there were key influencing factors that needed to be addressed. Therefore, more than five years before the event, research was undertaken to provide initial economic impact return estimates and to focus attention on how to increase return. When The Ryder Cup was held in Ireland in 2006 an economic impact assessment was undertaken specific to the Dublin and Irish marketplace and the information from this was used to update estimates for the return to Wales, taking into consideration the very different locations of the host venues i.e. The Celtic Manor Resort is located close to the English border which would inevitably give rise to a loss of revenue to Wales. That initial piece of work, conducted in very different economic times, estimated the likely economic impact to Wales of event week 2010 could be £73m.

This pre planning process highlighted the requirement for an in-depth study of The 2010 Ryder Cup to provide a robust and detailed economic impact analysis to give results for:

- Newport – the host city and county for the event
- South East Wales – the local area (Monmouthshire, Torfaen, Newport, Blaenau Gwent, Caerphilly, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, Bridgend & The Vale of Glamorgan)
- Wales – the host country for the event
- UK (spectator, hospitality and volunteer impact only - excluding contractor expenditure)

The 2010 Ryder Cup – Economic Impact Assessment

Ryder Cup Europe LLP, who own the rights to, and stages the Ryder Cup when it is in Europe, worked closely with a range of interested parties (see below) to extend the remit to measure not only the economic return, but also the wider benefits of hosting the event. Hence, a full programme was designed to meet the needs of all the stakeholders:

- Ryder Cup Europe LLP – the event organiser
- Ryder Cup Wales 2010 Ltd – set up in 2003 to deliver on the Welsh Assembly Government commitments set out in Wales’ successful bid for The 2010 Ryder Cup
- The Celtic Manor Resort – the host venue for The 2010 Ryder Cup
- Newport City Council – the host local council for the event
- EventScotland – the hosts for the next European staging of the event at Gleneagles, Scotland in 2014
- UK Sport – responsible for investing public money in high performance sport in the UK and for coordinating the bidding for, and staging of, major sports events.

2.2. The Economic Impact of The 2010 Ryder Cup

The Total Economic Impact¹ for Wales of the 2010 Ryder Cup event held from 28th September to 3rd October (excluding the additional Monday's play) was £82.4million, including South East Wales drawing an impact of £74.6million, and Newport £28.3million.

The Direct Economic Impact² for Wales was £53.9m, while South East Wales saw an impact of £48.7m, and Newport £18.5m; these figures discount the adjustments made through the application of multipliers which capture the 'secondary impacts' of additional spending within the Welsh economy.

Spectator expenditure comprised almost 70% of the Direct Economic Impact on Wales with contractors (either Welsh based, using Welsh based products / services, or staying in Wales) the second most significant sector, contributing 17% of the value.

Hospitality return was lower than previous years mostly due to the shift in economic conditions. Over 170 companies hosted guests but there were more smaller local companies taking individual tables on a daily basis than in previous years, which reduced off-site expenditure. Volunteers helping at the event made a significant contribution of almost £1.3million.

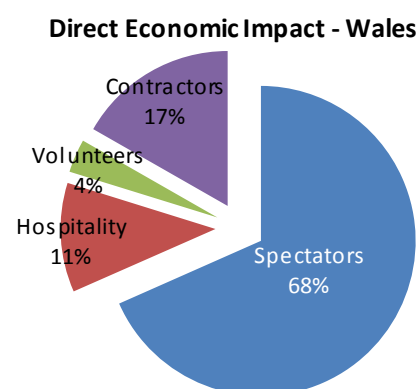


Table 1 – Summary of Economic Impact for The 2010 Ryder Cup

	Total Economic Impact *	Direct Economic Impact
Wales	£82.4 million	£53.9 million
South East Wales	£74.6 million	£48.7 million
Newport	£28.3 million	£18.5 million
UK	n/a	£28.0 million[†]

*Using Welsh based multipliers

[†]Excluding contractor expenditure

¹ Derived from the Direct Economic Impact plus the impact created by the suppliers of the sectors of the economy that service The Ryder Cup, and by local employees in the industries positively affected by The Ryder Cup from purchasing domestically produced goods.

² The immediate net change in economic activity in the sectors of the economy that service The Ryder Cup (e.g. accommodation, restaurants, car hire etc.) in terms of output or employment - including expenditure by people or firms from outside the catchment areas of Newport and Wales and payments made to companies within the catchment areas, but excluding secondary impacts as in ¹ above.

The 2010 Ryder Cup – Economic Impact Assessment

Table 2 - Direct Economic Impact of The 2010 Ryder Cup

Expenditure Group	Newport	South East Wales	Wales	UK
Spectators	£12.3m	£35.0m	£37.2m	£25.5m
Hospitality	£2.5m	£5.8m	£6.2m	£1.8m
Volunteers	£0.6m	£1.2m	£1.3m	£0.7m
Contractors	£3.0m	£6.7m	£9.1m	n/a
Total:	£18.5m*	£48.7m	£53.9m	£28.0m[†]
<i>Base: Tuesday 28th September to Sunday 3^d October</i>				
<i>Sources: The Ryder Cup Europe LLP/IFM Sports Marketing Surveys</i>				

*Note rounding of figures [†]Excluding contractor expenditure

The extension of play to Monday gave rise to a marginal increase in return, mostly in terms of off-site expenditure for accommodation. We estimate the additional Monday revenue to be in excess of £1million for spectators, hospitality, volunteers and infrastructure spend. NB. This estimated figure has NOT been included within this economic impact study.

2.3. The Research Programme

The 2010 Ryder Cup research programme began 12 months in advance to understand the complex nature of data and information which could be made available and to ensure that all stakeholders' requirements were met. The scope of the study was for the duration of the event itself. Full use was made of existing surveys, published data and the provision was made for those involved to provide detailed inventories of income and expenditure. Where data could not be collected in these ways, tailored surveys were undertaken amongst the target markets to gain the data required.

The attribution of data to the separate economies of Newport, South East Wales, Wales and the UK was helped enormously by the ticket application and allocation process. Due to the demand for Ryder Cup tickets and the need for security, Ryder Cup Europe LLP used an electronic ticket ballot system which provided detailed breakdowns by postcode for the ticket buyers.

The study focused on the host nation of Wales but there was a requirement to measure the return from a UK perspective from spectators, hospitality and volunteers. Hence, the analysis of attendees broadened further to distinguish between Wales, Rest of the UK and overseas residential profiles.

The full research programme combined its resources to provide information for the economic impact analysis as well as the areas required in analysing the benefits of hosting The Ryder Cup:

For the Economic Impact Survey directly:

Spectators	1,252 at event face to face interviews with the spectators who were responsible for paying most of the bills within their group. Quotas were set by day and by residential profile (from the ticketing database).
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Hospitality	Email and telephone follow up calls after the event with the 170 event organisers resulting in 42 surveys matched to company type, day and location for analysis.
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Volunteers	On-line email survey issued to the 1,600 volunteers with 262 responses weighted to match residential profiles.
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Contractors	Detailed information was provided by Ryder Cup Europe LLP and its contractors on expenditure by region on all areas of infrastructure, staging, media, management and players/entourage for the event.
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The 2010 Ryder Cup – Economic Impact Assessment

For additional event benefit analysis:

Spectators	A post event email survey via a Ryder Cup Europe LLP newsletter providing 2,872 responses weighted to match residential profiles.
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Local Golf Clubs	50 email and telephone surveys amongst golf courses in Wales and English borders undertaken post event.
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Local Businesses	401 telephone and face to face interviews with local businesses, during and after the event, in Wales and the English borders covering accommodation, restaurants, tourism, retail and services.
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Local Wales Residents	Questions added post event to a Wales Residents omnibus resulting in 1,012 interviews.
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GB National Population Tracker	Questions were added from March to December 2010 to a GB Omnibus to provide 3,138 interviews with monthly analysis.
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Visit Wales Golf Tourism Monitor	This study has been undertaken over a number of years measuring rounds played at golf courses in Wales with additional in-depth interviews with golf tourists.
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Media Analysis	The analysis of brand exposure on TV and in on-line print articles for The Ryder Cup, Visit Wales, Celtic Manor Resort and Newport City Council.
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Occupancy Data	The provision of hotel occupancy data from 2004 to 2010 for Cardiff and Newport.
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M4 Congestion Analysis	A specific report regarding congestion of the M4 during The Ryder Cup.
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The implementation of surveys and collation of data was undertaken by IFM Sports Marketing Surveys Ltd, and an independent economist with experience of sports and specifically golf events undertook the analysis for the economic impact study. The intention was that the method used for undertaking the economic impact assessment should be broadly in line with that of the eventIMPACTS toolkit developed by UK Sport in association with a consortium of partners who have an interest in supporting major public events in the UK. The 2010 Ryder Cup Economic Impact Assessment benefited from a comprehensive set of data and a very accurate measurement model which segmented the attendee profiles in line with different spending patterns to provide a more accurate assessment than average attendee data.

The primary objective was to provide Direct Economic Impact data. However, to enable comparisons to be made with other event studies where multipliers had been applied, use was made of multipliers specific to Wales, to provide Total Economic Impact figures.

2.4. The 2010 Ryder Cup

2.4.1. Spectators

Despite the poor weather there was an almost capacity attendance throughout the event. Based on ticket sales and scanning at points of entry onto the course, it was estimated that almost 250,000 visits were made by spectators to the Ryder Cup from the first Tuesday of practice (28th September) to the extended final days' play on Monday 4th October 2010.

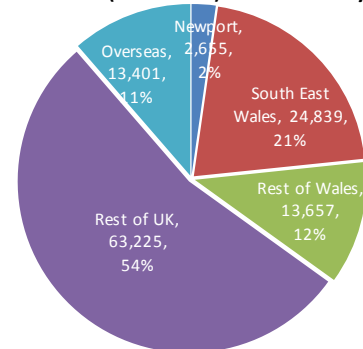
73% of spectators who were interviewed at the event, described The 2010 Ryder Cup as "exciting". Spectators commented that the event was "well organised" and "prestigious".

Many spectators attended for multiple days and it is estimated that ~118,000 individuals attended The 2010 Ryder Cup with a cross section of those from Wales, the Rest of the UK and overseas.

74% of Welsh residents interviewed strongly agreed that Wales as a host nation for The 2010 Ryder Cup "gave them pride in their country".

The average number of days attended was 2.3 with a clear trend for overseas visitors to stay longer (average 3.3 days) and to come in larger groups. Over a third of spectators lived in Wales; over half were from elsewhere in the UK; and more than 10% were overseas visitors.

Numbers of Visitors (individuals) to The 2010 Ryder Cup



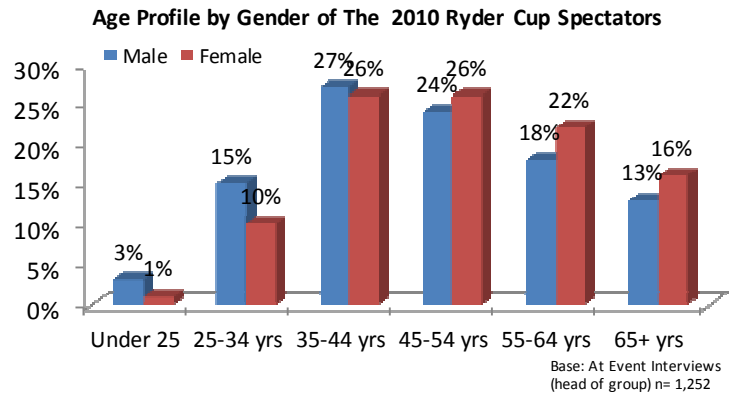
69% of overseas visitors interviewed agreed that the staging of The 2010 Ryder Cup in Wales had made them more likely to return to Wales for a short break or holiday.

Golf events attract keen golfers who admire the players and aspire to play the same course. The 2010 Ryder Cup was no exception with 89% of spectators currently playing golf and a further 6% having played the game previously. A combination of the general golfer profile and an event on weekdays and weekends provided an eclectic mix of individuals in professional/senior management or who were retired, choosing to come with spouses, friends, family or fellow golf club members.

77% of local golf club representatives interviewed after the event felt that golf tourism would increase in the long term in Wales as a result of the hosting of The 2010 Ryder Cup.

The 2010 Ryder Cup – Economic Impact Assessment

Reflecting the UK golfing population generally, the majority of spectators (79%) were male. A wide cross section of ages attended with female spectators tending to have a slightly older profile than the men.



81% of spectators interviewed had seen Welsh language on signage or heard Welsh spoken at The 2010 Ryder Cup.

The vast majority (80%) of spectators reached The Celtic Manor Resort by car, using the park and ride facilities which were rated highly. The congestion expected on the M4 around the event did not materialise due to early planning, signposting and routing to the relevant parking facilities. Over three quarters of car drivers were satisfied with the traffic flow to the event and the signage to the park and ride. A congestion study undertaken by the Welsh Assembly Government concluded congestion costs had been limited to £100,000-£200,000. Overseas visitors mostly arrived in the UK by plane then made use of hire cars or the train.

At the course, spectators made good use of the tented village for food and beverages and for merchandise purchases. There was an overall good feeling with the welcome received and the facilities provided – 86% were satisfied with the welcome received reflecting the staffing and volunteer structure at the event. The big screens added to the experience to allow the spectators to watch play from all around the course with almost 80% satisfied with the number of screens – these played an important part in the competition with the European Captain, Colin Montgomerie, requesting these to show “blue” to build a positive environment for the home players and spectators.

57% of spectators interviewed had stayed or played at The Celtic Manor Resort before attending The 2010 Ryder Cup.

All spectators had to purchase their tickets before the event and hence had planned their trip to The Ryder Cup well in advance with half staying overnight or extending their stay after the event. Most spectators stayed local to the venue in Newport or SE Wales although a small proportion opted to stay in England. Nearly all, 97%, of overseas visitors who were generally staying for longer, stayed overnight – two thirds opting to stay in Wales. Most stayed in commercially operated accommodation typically 3* hotels, guest houses or bed and breakfast establishments, with the overseas spectators more likely than domestic spectators to opt for the higher end (4 or 5*) hotels, most likely booked through a package.

71% of non-Newport residents, who attended The 2010 Ryder Cup and were interviewed, agreed that their visit to the event had enhanced their image of Newport as a visitor.

The 2010 Ryder Cup – Economic Impact Assessment

2.4.2. Hospitality

The 2010 Ryder Cup offered five different locations to host guests around the course, with different formats and packages:

1. The Past Captains Club with a lounge and restaurant on two tiers overlooking the 18th green;
2. The Harlech Pavilion on three tiers also overlooking the 18th fairway, and playing host to the majority of the event partners, governing bodies, and providing meeting rooms;
3. The Caerffili Pavilion on two tiers overlooking the 17th green mostly hosting partners and suppliers;
4. The Conwy Club, a two tier restaurant complex catering mostly for Celtic Manor Resort members;
5. The Kidwelly Pavilion on two floors, housing the Presidents Club, Celtic Manor Resort guests and hospitality guests from individual companies.

Partners of the event and the European Tour were provided with hospitality as part of their sponsorship rights inventory with other companies buying their packages separately. Sales of hospitality packages are not included within the economic impact survey as these monies go direct to Ryder Cup Europe LLP which is not based in Wales. However, any expenditure by the contractors in Wales for set up, staffing or catering suppliers was accounted for within the contractor element of the economic impact assessment.

The economic climate forestalled sales of hospitality and in the run up to the event different options were provided to attract smaller companies to attend taking tables of 10 guests for one day or more. This ensured a full hospitality programme but impacted on the overall economic impact return, as the smaller companies were more likely to be local and therefore had limited requirements for off-site accommodation.

Overall 172 companies were represented at The 2010 Ryder Cup with 15,441 guest days. The average attendance was 1.4 days across all hospitality areas, resulting in a total of almost 11,500 individual guests attending. Event organisers (excluding catering staff) also brought 512 of their own staff to look after the guests and stayed for longer (2.4 days average).

The vast majority of the economic return from hospitality, both guests and staff, came from off-site activities – accommodation, food and beverage and additional events.

2.4.3. Volunteers

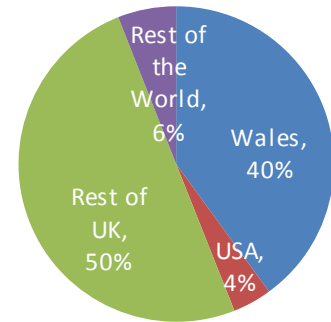
A total of 1,600 volunteers were recruited from Wales (40%), the rest of the UK (50%) and overseas (10%). The majority (87%) were male with 80% aged over 45 years, reflecting a third being retired. Those working were mostly in professional or senior management positions and all were current (98%) or lapsed (2%) golfers.

Most of the volunteers were marshals on or around the course with a fifth having leadership roles. Almost 90% had volunteered before at some form of sporting event, with 29% having marshalled at a previous Ryder Cup.

These volunteers gave a significant amount of their time, with most staying for 8 days of which 7 days were at the event itself. Those from Wales were less likely to need accommodation but overall 55% of volunteers did stay overnight, the majority in commercial bed & breakfasts/guesthouses.

Volunteers are a very important element of The Ryder Cup and the management of them is crucial. Those at The 2010 Ryder Cup at Celtic Manor felt that they were well trained (62%), given good instructions (67%) and their efforts were appreciated (68%). This experience has impacted on their lives with many wanting to volunteer again for The Ryder Cup (79%) and two thirds looking to help out at other sporting events.

Residential Profile of Volunteers



2.4.4. Contractors & Infrastructure

A complex mix of services is involved in staging the Ryder Cup event, as well as the requirement for media to report, management to organise, and the players to entertain. For The 2010 Ryder Cup the emphasis was to use as many Welsh based suppliers, products and services as possible within the business realms of cost efficiencies.

The emergency services were all Welsh based using the Welsh Ambulance Service, Gwent police and local supply of fire extinguishers and medics. In terms of the staging of the event, as much as possible was sourced from Welsh based companies and local staff for the set-up of the car parks, buses, barriers, cleaning, signage, traffic management, waste disposal, telecoms, printing, stands and marquees etc.

The leading contracted catering company for hospitality and public areas made concerted efforts to use local sources for both produce and temporary staff.

The University of Wales, Newport lies within the Newport City Council boundaries and was contracted to house the majority of TV staff with other media estimated to use almost 5,000 bed nights locally around the course. The management team all stayed within the Newport area in the run up to and during the event to add to the local economy, with the players and their entourage being hosted at The Celtic Manor Resort itself.

2.5. Factors Affecting the Economic Impact

The full research programme established that there were key factors affecting the Direct Economic Impact for Wales and the relevant regions and the relevant expenditure has been excluded from the study:

- The location of The Celtic Manor Resort on the border with England meant that:
 - Many of those attending from / based in England were able to make daily visits rather than stay overnight.
 - Loss of potential income to Wales came through:
 - Accommodation being used in England – e.g. Bristol, Bath, Gloucester
 - Contractors, although sourcing as much as possible in Wales, being able to cost efficiently transport products and services from England into Wales
 - Hospitality groups using hotels in England and hosting additional evening events outside of Wales.
 - The economic conditions did affect overall attitude to attendance, length of stay and extended stays both for the public and the corporate sectors.

Wales and Ireland as the most recent hosts of the European staging of The Ryder Cup had very different locations and hence there are differences in what has been included or excluded from each of the economic impact studies undertaken:

- In 2006 the location within Ireland ensured more of the staging was sourced in Ireland with transportation costs limiting the ability to import the infrastructure required to set up the event. In Ireland in 2006 almost €30m (£20.3m at 2006 exchange rates) was included for these staging costs, in Wales in 2010 less than a quarter of this amount could be locally sourced.
- The Twenty Ten Course at Celtic Manor was specifically built to stage The 2010 Ryder Cup with the direct costs of building the course, clubhouse, bridges and bus parks estimated to be in the region of £20million, of which 90% was sourced in Wales. This figure has NOT been included within this economic impact study. However, in 2006, figures were included for the course alterations, clubhouse refurbishment and additional staffing required to update The K Club of some €5.6m (less €1million business interruptions) = £3.8m (less £0.7m business interruptions at 2006 exchange rates).
- To support The 2010 Ryder Cup the Welsh Government brought forward spending in the area for Newport and transport locations. Newport itself received advanced funding of ~£3.8m and this has not been included in the report as it was funding due to occur in the future. In 2006, Kildare County Council and Tourism Authorities invested with grants to help the event run smoothly. It was taken that these would not have happened if The 2006 Ryder Cup had not been taking place and hence a further €12.8m of public sector investment was included within the report.

3. Scope, Expenditure Groups & Methodology of the Study

3.1. Scope of The 2010 Ryder Cup EIA

An economic impact assessment is a tool that measures the effects of expenditure and employment generated by investment in a specific industry or event. There are three key elements of an economic impact assessment, which include direct, indirect and induced impacts. **The 'Total Economic Impact' is comprised of the total of these three elements. As the present study will include all three, these are each summarised below:**

1) Direct Economic Impact: includes all 'new money' brought into the economy due to the staging of The Ryder cup at The Celtic Manor Resort, which could include foreign visitor expenditure within the catchment, new contracts won by local businesses or hospitality spend by companies entertaining guests at The Ryder Cup. This figure is calculated via detailed surveys of the expenditure of the various 'Expenditure Groups' detailed later in this section.

2) Indirect Economic Impact: is one of two 'ripple effects' caused by 'new money' entering the economy and is comprised of the increase in orders placed by companies experiencing an increase in demand due the staging of The Ryder Cup. For example, an increase in demand by visitors for hotel accommodation will result in an increase in the hotel placing additional orders for food, etc. This figure is calculated via applying 'multipliers' derived from macroeconomic modelling to the Direct Economic Impact figures referenced above. Higher multipliers indicate a higher density of inter-firm networks such that any money entering the economy will circulate more extensively prior to exiting via leakage.

3) Induced Economic Impact: is the second 'ripple effect' caused by 'new money' entering the economy and is comprised of the increase in consumer demand resulting from residents earning additional wages via over-time or temporary contracts associated with the staging of The Ryder Cup. For example, hotels may pay their staff to work over-time during The Ryder Cup to cope with the increase in occupancy, such that they then spend this increase in income

The 2010 Ryder Cup – Economic Impact Assessment

elsewhere within the economy, further stimulating demand elsewhere. This figure is also calculated via applying 'multipliers' to the Direct Economic Impact.

To our knowledge, the Welsh Assembly Government do not provide any official multipliers, we have utilised those produced by the Welsh Economic Research Unit at Cardiff University.¹ In the absence of official multipliers, we believe these to provide us with a reasonable basis for calculating the total economic impact for the Ryder Cup on Wales (plus South East Wales and Newport).

Whilst the direct, indirect and induced impacts are each separately calculated within the economic impact model which forms the basis of this report, only the direct and total figures are reported, in the interest of simplicity.

To reiterate, the total economic impact estimate includes ONLY the sum of the direct, indirect and induced impact figures as referenced and defined above.

It must be noted that there were significant wider effects and benefits to Wales in hosting The Ryder Cup which do not form part of the economic impact assessment. However, they have been measured and are included separately in this report and include:

- Media exposure for Celtic Manor Resort, Newport and Wales
- Golf tourism from 2002-2010 to the region as a direct result of The Ryder Cup
- Advanced investment in infrastructure e.g. Newport railway station, required to host the event, and on-site at The Celtic Manor Resort.

¹ Jones, Calvin, Jane Bryan and Annette Roberts. "The Input-Output Tables for Wales, 2007", Welsh Economy Research Unit, July 2010 (www.cf.ac.uk/carbs/research/groups/weru/IO_2007_Final_30_6.pdf).

3.2. Expenditure Groups

In order to calculate these impacts, IFM Sports Marketing Surveys gathered data from a number of sources, predominantly from primary research with spectators, event volunteers, hospitality organisers and local businesses and from information provided by Ryder Cup Europe LLP, Ryder Cup Wales and partners

- a) **Spectators:** 1,252 face to face interviews were conducted with spectators at the event with quotas set on country of residence to achieve representative samples for the EIA. The analysis included weightings, based on postcode analysis of ticket sales, to ensure that the sample was representative of the regions being analysed for the EIS – Newport, SE Wales, Wales, UK and Overseas.
- b) Information on the **hospitality** sold at The Ryder Cup was provided by Ryder Cup Europe LLP and supplemented via interviews (telephone and email) with companies hosting guests.
- c) **Volunteers:** 254 interviews were conducted with volunteers through a post event email survey and again weightings were set based on postcode analysis for the volunteers to ensure the analysis was representative of Wales regions and country of residence.
- d) The **contractor** information sourced through Ryder Cup Europe LLP covered a wider range of topics with a focus of data supplied for Wales income and expenditure only. Information within this expenditure group includes the following and covers only those areas in use or required during the event itself (not set up or break down):
 - Emergency Services – ambulance, fire, first aid and policing
 - Infrastructure – cleaning, barriers, track ways, signage, park and ride, security, traffic management, marquees, waste disposal, telecoms, printing
 - Catering & Suppliers – public and hospitality areas
 - Management & Players – staging teams, players & entourage (all stayed at Celtic Manor Resort)
 - Media – TV contractors were hosted in the local Caerleon University with other media estimating almost 5,000 bed nights during the event.

These contractors' impact on the local economy includes both personal and corporate expenditure by permanent staff as well as the hiring of temps, volunteers, subsistence payments and other expenditures. The location of the contractors' office was another key consideration, as contracts won by local companies provided additional stimulus to the economy. The data includes not only contractor fees but also any additional off-site spend on accommodation and subsistence.

3.3. Methodology

The underlying factor throughout the project was one of collation of the most accurate data and the need to be able to analyse by the three regions of Newport, South East Wales and Wales. In addition for spectators, hospitality and volunteers there was a need to include data for outside of Wales.

Guidelines from eventIMPACTS, the event measurement tool from UK Sport, were used during the project.

3.3.1. Data Collection

Data was collected from each of the expenditure groups as outlined in the previous section. This data was then imported into a complex model:

- **Spectators & Volunteers:** The respondent data was fed into the model on a line by line basis in order to allow segmentation of individual profiles which would influence the economic impact, for example:
 - Residential profile – using postcode analysis to show the residential region of the spectator – Newport, SE Wales, Wales, Rest of UK, overseas.
 - Primary visit – those who were in Wales primarily for the Ryder Cup. Casual visits were minimal for this study as ticket sales were in advance.
 - Overnight stays in commercial accommodation – profiled by region, number in group, packages, prices per night per person, number of nights.
 - Extended stays in commercial accommodation – profile as overnight stays for the event itself.
 - Transport to the event, number in group, on-site spend etc.

Market sizing was applied to each of these groups based on data provided by Ryder Cup Europe LLP from the ticketing database.

The 2010 Ryder Cup – Economic Impact Assessment

- **Hospitality:** Hospitality sales were excluded from the analysis as revenues went directly to Ryder Cup Europe LLP which is not based in Wales. The focus was for additional off-site spend made by event organisers, their guests and staff. The responses from the event organisers were combined with detailed figures from Ryder Cup Europe LLP on the size and nature of the hospitality packages purchased to enable weightings to be applied. The data was analysed separately for guests and staff (non-catering) to establish:
 - Residential profiles – Newport, SE Wales, Wales, Rest of UK and Overseas
 - Accommodation – location, overnight stays, number of nights and cost per night
 - Additional spend – additional events and food and beverage spend.
- **Contractors:** A full list of contractors and services was provided with the location of the contractors and their spend clearly identified by the relevant regions – Newport, South East Wales, Wales, Rest of the UK and Overseas. The full details of spend from these contractors was sourced from Ryder Cup Europe LLP, Ryder Cup Wales 2010 Ltd, Newport City Council and the contractors themselves. This covered all sectors including emergency services, infrastructure/staging, catering & suppliers, management & players and the media.

3.3.2. Factors included within the Economic Impact Calculations

The following factors were taken into consideration when calculating the economic impact for The 2010 Ryder Cup.

3.3.2.1. Catchment Area

Whereas there are generally only two catchments assessed within most EIA's, the present economic impact assessment of The 2010 Ryder Cup includes an assessment of four catchment areas – Newport, South East Wales, Wales and the United Kingdom (excluding contractors).

For the catchment area of Newport, it was assumed that all expenditure generated by visitors to The 2010 Ryder Cup who stayed outside Newport, was made outside this region on the days when they were not attending the event. Likewise, it was assumed that all gross expenditure made by visitors staying within Newport on those days was actually spent inside the region. In addition, it was assumed that if the spectator was not staying overnight in Newport, all gross expenditure on evening meals and transport was made elsewhere in Wales.

The 2010 Ryder Cup – Economic Impact Assessment

The same principles apply to the catchment areas of Wales, South East Wales and the UK, such that the gross expenditure associated with these catchments will differ - even before netting out expenditure based on their place of residence - this being either inside or outside the catchment in question.

3.3.2.2.Visitor Segmentation & Market Sizing

For the purposes of this report, visitors to The 2010 Ryder Cup have been segmented into five groups:

- **Newport:** All attendees of The 2010 Ryder Cup who live within Newport
- **Rest of South East Wales:** All attendees of The 2010 Ryder Cup who reside within regions of South East Wales other than Newport
- **Rest of Wales:** All attendees of The 2010 Ryder Cup who reside within regions of Wales other than South East Wales
- **Rest of the UK:** All attendees of The 2010 Ryder Cup who reside within the rest of the UK
- **Overseas Visitors:** All attendees of The 2010 Ryder Cup who reside outside the UK.

Whilst the economic impact is reported for the whole of Newport, South East Wales, Wales and the UK, the visitors are segmented in this manner because the economic impact for any of the economic regions excludes the economic impact of monies spent by residents of that region - the assumption being that their expenditure would likely have been made within their region of residence even in the absence of the staging of The 2010 Ryder Cup in Newport.

3.3.2.3.Economic Assumptions

Calculating the gross expenditure of visitors requires multiplying the number of attendees by the mean spend per individual admission for each of the visitor groups. The gross expenditure is converted to a net expenditure (Direct Economic Impact) figure by removing the expenditure of any visitors residing within the economic region in question, ensuring no double-counting of expenditure, removing the expenditure of 'Time Switchers' assessing event additionality and visitor displacement and removing this expenditure according to the assumptions detailed below.

3.3.2.4. Substitution

It is assumed that if demand for the output of one industry is transferred to another, then it is unlikely to stimulate an economy. All expenditure made by local residents has been excluded from the incremental economic impact of The 2010 Ryder Cup as it is probable that this expenditure would still have been spent within the catchment area even if The Celtic Manor Resort were not the venue for The 2010 Ryder Cup.

In theory, the only exception to this rule is the wages earned by people who live within the catchment areas employed by contractors who are based outside the catchment area. The wages of people employed by local companies at The 2010 Ryder Cup who live within the catchment area are not included, as the expenditure is counted as that of the contractor (i.e. with double-counting occurring if the value of the contract is counted in addition to the wages of staff working to fulfil the contract. See 'Double-Counting' below).

The economic impact assessment for The 2010 Ryder Cup is particularly conservative with regards to wages paid by contractors to any local staff. All such wages have been excluded from the study to prevent any possibility of double-counting and ensuring accounting for any substitution effects. The employment effects of the economic impact of The 2010 Ryder Cup will be separately estimated via employment multipliers, with the impact of increased income to local residents (i.e. induced impact) being estimated via the Type II multipliers.

3.3.2.5. "Time-switching" and "Casuals"

Some visitors to The 2010 Ryder Cup from outside the catchment area may have rearranged an existing (or proposed) trip to Newport to coincide with the event.

In this report, visitors who said that they would have visited Wales between Tuesday 28th September and Sunday 3rd October, irrespective of the staging of The 2010 Ryder Cup were considered "Time-Switchers" and their expenditure was excluded. If these respondents said that they had extended their stay to attend The Ryder Cup and remain on-site longer than they would have if The 2010 Ryder Cup had not been hosted in Newport, the expenditure for the extra days was considered. Those respondents who said they rearranged a planned trip to Wales to coincide with The Ryder Cup were also considered "Time-Switchers".

The 2010 Ryder Cup – Economic Impact Assessment

“Casuals” are generally characterised by visitors spontaneously deciding to attend The Ryder Cup whilst on holiday, such that they were already present as tourists in the local market regardless of the staging of the event. Alternately, they can also be tourists pre-booking a holiday with a view to attending The Ryder Cup during a holiday which may have as its main purpose visiting other tourist attractions in the local area that have as much or greater attraction than the sporting event in question - such that The Ryder Cup was a secondary consideration in booking the holiday.

As tickets for The 2010 Ryder Cup needed to be pre-booked, there was no spontaneous attendance at the event by tourists who were in Wales for other reasons. All attendance at The 2010 Ryder Cup was planned and purposeful, minimising the incidence of casuals. As Wales is an emerging tourist destination, with The 2010 Ryder Cup putting Newport on the map in terms of golf tourism, there were very few visitors to Newport surveyed whose visit to Newport was motivated by reasons other than attending The Ryder Cup. This type of dual-purpose holiday partially motivated by the sporting event is more common in more well established tourist markets where other attractions compete with the sporting event for visitors' attention. In Newport, The 2010 Ryder Cup clearly dominated all other considerations in terms of driving visits to the local area for the vast majority of visitors.

3.3.2.6. “Double-Counting”

Some data has been provided by more than one source, but it has only been included in the expenditure of one of the impact groups to ensure that the economic impact has not been overestimated.

For example, spectators surveyed on-site purchased tickets to attend The 2010 Ryder Cup. However, this ticketing revenue was subsequently spent by the organiser to pay contractors. The value of the contracts has been included in the economic impact assessment, as per the location of the contractor receiving each contract. However, if we were to count the ticket revenues in the spectator survey and these revenues when subsequently spent by the organiser to host the event, this would involve double-counting. Therefore spectator's expenditure on tickets has been excluded from the calculations to avoid double-counting.

The 2010 Ryder Cup – Economic Impact Assessment

All other instances of double-counting have been identified and removed from the calculations. Wages paid to staff working for contractors of The 2010 Ryder Cup have likewise been excluded along with any expenditure by worker receiving such salaries. However, expenditure by volunteers working on-site has been counted, given that they have spent their own, personal funds in travelling to The 2010 Ryder Cup and assisting with the staging of the event.

3.3.2.7. Displacement

Displacement expenditure is potential expenditure that is withdrawn from the catchment area because The 2010 Ryder Cup was staged in Newport. An example would be tourists who decided not to visit Newport because The 2010 Ryder Cup was taking place, possibly due to costs such as traffic congestion or increased prices for hotel rooms.

An effect such as this is difficult to measure without conducting a much wider study to determine how many people decided not to go to Wales on holiday because of The 2010 Ryder Cup. For the purposes of this study, it is assumed that The 2010 Ryder Cup had no displacement effects. Whilst it is beyond the scope of this study to quantify them accurately, due to the size and scale of the event relative to the host economy, they are also likely to be negligible.

3.3.2.8. Leakage

In order to be particularly conservative in our estimates, we have endeavoured to determine whether monies spent by non-local visitors remain within the local economy or whether these funds quickly exit the economy to foreign owners, etc. Whilst it is not practical to account for the ownership structure of publicly listed companies every time a visitor purchases a soft drink made by a multinational firm, it has in certain instances been possible to make accurate and reasonable assumptions regarding the leakage of expenditure out of the local market.

The 2010 Ryder Cup – Economic Impact Assessment

For example, leakage of expenditure with on-site merchants has been estimated via surveys with these vendors to establish where their operations are normally based. On-site visitor expenditure with merchants who are typically based outside the local market was netted out of the economic impact calculations as per the table below:

Table 3 - Merchandise Vendor Origin

Economic Region	On-Site Vendors Surveyed	Market Mix of Vendors Surveyed
	(#)	(%)
Newport	0	0.0
Rest of South East Wales	1	5.9
Rest of Wales	3	17.6
Rest of UK	14	82.4
Total	17	100%

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Likewise, it was assumed that expenditure on car hire would generally be made at the airport of arrival with visitors using a variety of airports to travel to The 2010 Ryder Cup, none of which are located within Newport. However, it is entirely possible that some visitors travelled to Newport by train only to discover that it would be more cost-effective to hire a car locally than to rely upon taxis - such that there may also be some hire cars booked within the local market.

Whilst no survey data was collected regarding the location of booking one's hire car, the following assumptions have been made as to the share of car hire expenditure to be included within the net impact calculations, after accounting for leakage of this expenditure out of the catchment, as shown below:

Table 4 - Estimated Leakage of Car Hire Expenditure

Economic Region	Leakage	Net Car Hire Spend
	(%)	(%)
Newport	75.0	25.0
South East Wales	50.0	50.0
Wales	25.0	75.0
UK	0.0	100.0

Source: IFM Sports Marketing Surveys

It is not practical to fully account for all leakage of expenditure out of the local market via surveys of either visitors or the firms with whom they purchase goods and services during the course of their visit.

The 2010 Ryder Cup – Economic Impact Assessment

As the extent of leakage versus re-circulation of expenditure within the economy cannot be fully accounted for via survey research alone, we are relying upon input-output tables to provide a more robust view on the extent that monies will circulate within the economy depending upon the sector within which the monies are spent - with some sectors being characterised by more extensive inter-linkages within the host economy than others.

3.3.3. Economic Impact Calculation Outputs

The main three figures shown within this report are:

- 1) Gross Expenditure:** In the interests of transparency, reliability and verifiability, we have provided the gross expenditure for The Ryder Cup in our detailed findings only to show the base for the direct and total calculations.
- 2) Direct Economic Impact:** includes all 'new money' brought into the economy due to the staging of The Ryder cup at The Celtic Manor Resort, which could include foreign visitor expenditure within the catchment, new contracts won by local businesses or hospitality spend by companies entertaining guests at The Ryder Cup.
- 3) Total Economic Impact:** This figure is derived from the Direct Economic Impact **plus** the impact created by the suppliers of the sectors of the economy that service The Ryder Cup (indirect), **plus** the impact created by local employees in the industries positively affected by The Ryder Cup from purchasing domestically produced goods (induced).

These figures are shown in the context of:

- **Newport**
- **South East Wales**
- **Wales**
- **UK (where appropriate)**

3.3.4. Gross Expenditure and Direct Economic Impact

The gross expenditure acts as an indicator for the overall scale of expenditure surrounding The 2010 Ryder Cup. The gross expenditure associated with an event does not differentiate between expenditures made by local residents and businesses and the expenditures made by visitors to the catchment area, businesses based outside the catchment area and public bodies. However, the direct economic impact illustrates the economic benefits for the economy of the catchment area that occur with the staging of The 2010 Ryder Cup. Therefore, only the direct economic impacts should be considered while making strategic or investment decisions.

However, the gross expenditure associated with an event does differentiate between where the expenditure occurred. Where visitors to The 2010 Ryder Cup are staying in accommodation in England, their expenditure is associated with The 2010 Ryder Cup, but does not form part of the gross expenditure attributable to Wales. This gross 2010 Ryder Cup expenditure is attributable to England. Therefore, the gross expenditure is useful as an indicator not only of how much money is being spent in conjunction with the staging of The Ryder Cup but also of where this money is being spent.

The direct economic impact of the event represents an injection into the local economy by differentiating between expenditure that can be attributed to the staging of The 2010 Ryder Cup in Newport and expenditure that would likely have occurred within the catchment at some point during the year, irrespective of the event. The majority of expenditure by local residents and by tourists, who would have visited Newport without The 2010 Ryder Cup taking place, is not included because it is assumed that this would have occurred anyway. Thus, the Direct economic impact provides a reliable measure of how much 'new money' is being brought into the economy as a result of The 2010 Ryder Cup, which is why only Direct Economic Impact figures are relevant to strategic or investment decisions.

The expenditure of local residents or persons residing within the economic region for which the economic impact is being assessed is never included in the net impact calculations as this money would likely have been spent elsewhere within the economy regardless of the staging of The 2010 Ryder Cup.

The 2010 Ryder Cup – Economic Impact Assessment

The only case in which we have included some of the expenditure of non-locals who would have visited the location even if The Ryder 2010 Cup had not been hosted locally is the expenditure from people who have extended their visit to the local area in response to the staging of The Ryder Cup (i.e. 'Time-Switchers') and those whose visit to and expenditure in the local area is partially motivated by The 2010 Ryder Cup (i.e. 'Casuals'). This and other economic assumptions are reviewed in more detail above.

3.3.4.1. Total Economic Impact

Total Economic Impact requires the measurement of indirect and induced impacts once the Direct Economic Impact has been calculated. Derivation of these impacts can take several forms including the use of input-output tables, computable general equilibrium analysis or proportional multiplier analysis. The most common (and simple) type of analysis uses input-output tables, which model the inter-industry transactions of an economy.

As the economic impact assessment for The 2010 Ryder Cup spans multiple economies, the present study utilises Welsh multipliers developed by the Wales Economy Research Unit for all Newport, South East Wales and Wales economic impacts.

4. Detailed Expenditure Analysis

4.1. Introduction

This section analyses the expenditure and economic impact from each expenditure group.

As the present report assesses the economic impact of The 2010 Ryder Cup of four catchment areas - twice as many catchments as are generally included in an EIA, there is a large volume of numbers to present and interpret. Where possible, we have endeavoured to simultaneously present the economic impact of all four regions.

It is anticipated that each reader will have an interest in the economic impact on a particular region and it is hoped that all readers will be able to follow the course of the analysis from detailed tables through to the summary and conclusion with equal fluidity, providing equal coverage within the report to all catchment areas in question.

The analysis therefore begins with a more granular view of gross expenditure, after which the Direct Economic Impact will be presented, followed by the multiplier effects and the total impact. Each section concludes with a summary of the expenditure and economic impact of each expenditure group, across all types of expenditure.

NB: "Netted out" is a frequently used phrase within this report which describes the allocation of expenditure to each of the regions to accurately show the Direct Economic Impact.

4.2. Overall Economic Impact Estimates

The tables below summarise the Direct Economic Impact for each of the regions, with the following sections showing detailed analysis of how these figures have been derived from the different expenditure group:

Table 5 - Wales - Breakdown of Direct Economic Impact

Wales		Direct Economic Impact				
VISITORS		Spectator	Hospitality	Volunteers	Total	Visitor %
On-Site	Food & Drink	£4.963m	-	£0.220m	£5.18m	11.6%
	Merchandise	£1.195m	-	£0.119m	£1.31m	3.0%
	Other	£0.565m	-	£0.044m	£0.61m	1.4%
Travel	Car Hire & Taxis	£0.686m	-	£0.029m	£0.72m	1.6%
Off-Site	Accommodation	£22.092m	£3.580m	£0.502m	£26.17m	58.4%
	Other	£6.684m	£2.644m	£0.356m	£9.68m	21.6%
Extended Stay	Accommodation,	£0.732m	-	£0.027m	£0.76m	1.7%
	Food & Drink					
	Tourism	£0.065m	-	£0.001m	£0.07m	0.2%
	Golf Fees	£0.073m	-	£0.006m	£0.08m	0.2%
	Other	£0.177m	-	£0.006m	£0.18m	0.4%
TOTAL VISITORS		£37.2m	£6.2m	£1.3m	£44.8m*	100%*
CONTRACTORS					£9.1m	
DIRECT ECONOMIC IMPACT:					£53.9m	

*Note rounding of figures

The 2010 Ryder Cup – Economic Impact Assessment

Table 6 - South East Wales - Breakdown of Direct Economic Impact

SE Wales	Direct Economic Impact					
VISITORS		Spectator	Hospitality	Volunteers	Total	Visitor %
On-Site	Food & Drink	£5.544m	-	£0.231m	£5.8m	13.8%
	Merchandise	£0.421m	-	£0.042m	£0.5m	1.2%
	Other	£0.703m	-	£0.045m	£0.8m	1.9%
Travel	Car Hire & Taxis	£0.488m	-	£0.012m	£0.5m	1.2%
Off-Site	Accommodation	£20.738m	£3.735m	£0.478m	£25.0m	59.5%
	Other	£6.302m	£2.071m	£0.371m	£8.7m	20.7%
Extended Stay	Accommodation,	£0.553m	-	£0.024m	£0.6m	1.4%
	Food & Drink					
	Tourism	£0.065m	-	£0.001m	£0.07m	0.2%
	Golf Fees	£0.025m	-	£0.006m	£0.03m	<0.1%
	Other	£0.131m	-	£0.004m	£0.14m	0.3%
TOTAL VISITORS		£35.0m	£5.8m	£1.2m	£42m*	100%*
CONTRACTORS					£6.7m	
DIRECT ECONOMIC IMPACT:					£48.7m	

*Note rounding of figures

Table 7 - Newport - Breakdown of Direct Economic Impact

Newport	Direct Economic Impact					
VISITORS		Spectator	Hospitality	Volunteers	Total	Visitor %
On-Site	Food & Drink	£6.828m	-	£0.325m	£7.2m	46.5%
	Merchandise	-	-	-	-	
	Other	£0.736m	-	£0.049m	£0.8m	5.2%
Travel	Car Hire & Taxis	£0.138m	-	£0.003m	£0.1m	0.7%
Off-Site	Accommodation	£2.917m	£1.723m	£0.135m	£4.8m	31%
	Other	£1.519m	£0.820m	£0.119m	£2.5m	16.1%
Extended Stay	Accommodation,	£0.074m	-	£0.008m	£0.08m	0.5%
	Food & Drink					
	Tourism	£0.040m	-	-	£0.04m	0.3%
	Golf Fees	-	-	£0.001m	£0.001m	<0.1%
	Other	£0.011m	-	£0.001m	£0.01m	<0.1%
TOTAL VISITORS		£12.3m	£2.5m	£0.6m	£15.5m*	100%*
CONTRACTORS					£3.0m	
DIRECT ECONOMIC IMPACT:					£18.5m	

The 2010 Ryder Cup – Economic Impact Assessment

Table 8 - UK - Breakdown of Direct Economic Impact

UK	Direct Economic Impact					
VISITORS		Spectator	Hospitality	Volunteers	Total	Visitor %
On-Site	Food & Drink	£1.454m	-	£0.046m	£1.5m	5.4%
	Merchandise	£2.728m	-	£0.149m	£2.877m	10.3%
	Other	£0.174m	-	£0.006m	£0.18m	0.6%
Travel	Car Hire & Taxis	£0.676m	-	£0.036m	£0.712m	2.6%
Off-Site	Accommodation	£14.568m	£0.942m	£0.245m	£15.755m	56.5%
	Other	£4.279m	£0.816m	£0.118m	£5.213m	18.7%
Extended Stay	Accommodation,	£1.233m	-	£0.063m	£1.296m	4.6%
	Food & Drink					
	Tourism	£0.042m	-	£0.007m	£0.049m	0.2%
	Golf Fees	£0.110m	-	<£0.001m	£0.110m	0.4%
	Other	£0.190m	-	£0.008m	£0.198m	0.7%
TOTAL VISITORS		£25.5m	£1.8m	£0.7m	£28.0m*	100%*
CONTRACTORS					n/a	
DIRECT ECONOMIC IMPACT:					£28.0m	

*Note rounding of figures

4.3. Spectator Expenditure

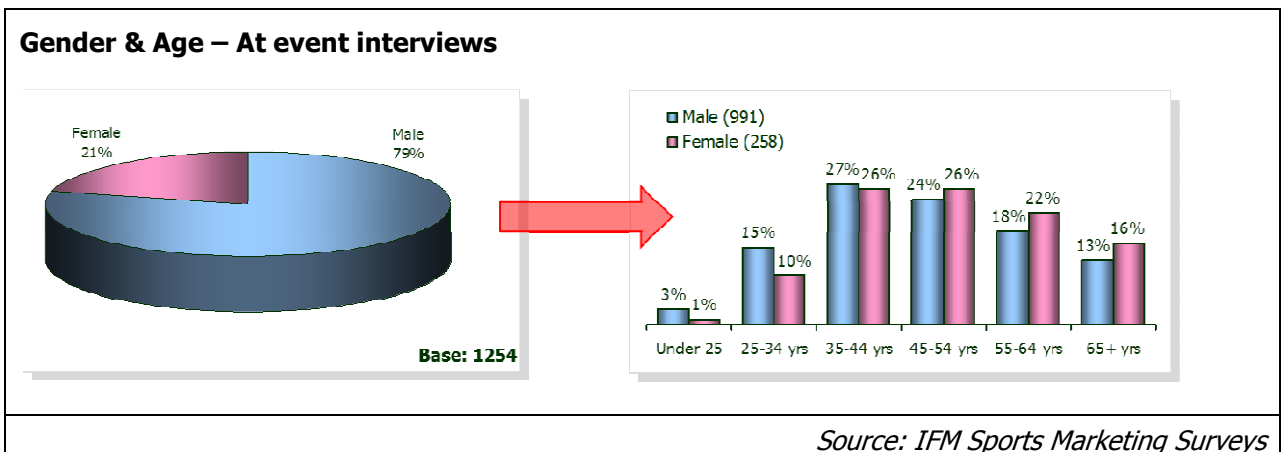
The expenditure of spectators forms an important part of the economic impact of a golf event. It is also the most highly variable component, given that the number and value of the contracts required to stage the event will be fairly consistent from year to year.

Whilst the volume of visitors in attendance depends on the sales and marketing effort and economic conditions, the economic impact of these visitors depends on the market mix of visitors from various countries as well as the amount spent on-site by visitors from each. After briefly reviewing the profile of visitors to The 2010 Ryder Cup, we explore the segmentation of these visitors by source market and the size of each segment of the market for spectators. As with previous economic impact studies for The 2010 Ryder Cup, ticketing expenditure has been excluded as tickets are purchased well in advance and all revenues are paid to Ryder Cup Europe LLP which is based in England.

4.3.1. Spectator Profile

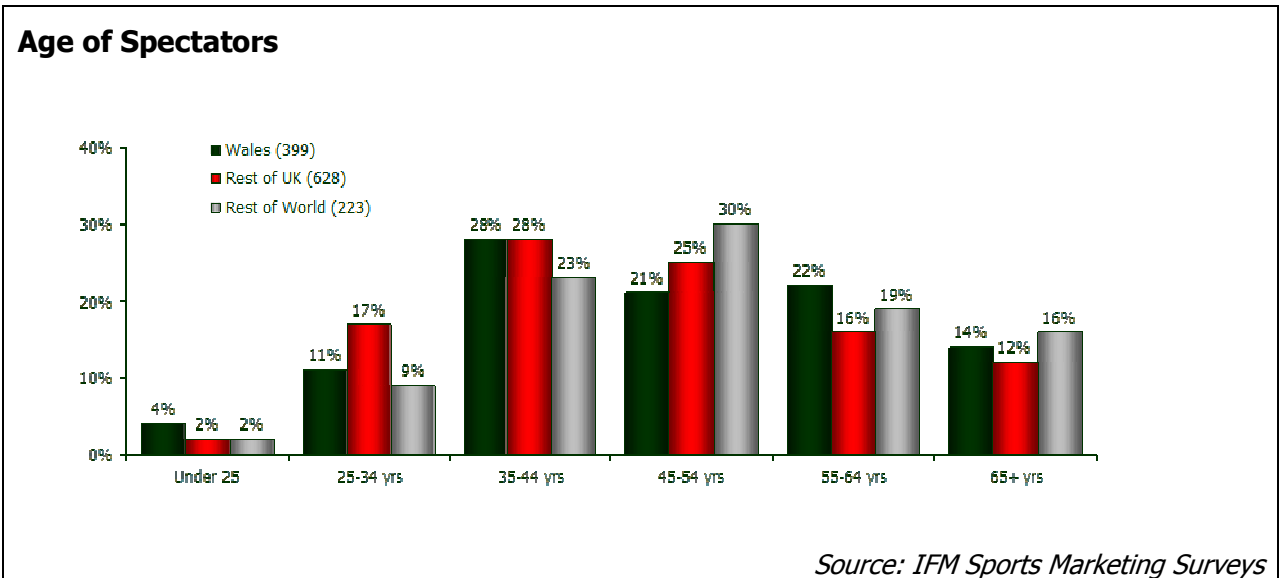
Based on the 1,252 valid expenditure surveys undertaken on-site, face-to-face between Tuesday 28th September and Sunday 3rd October, profiling information below corresponds to the spectators being interviewed during the event and focus on the head of group who was able to provide the monetary information required for the economic impact study.

As shown below, the vast majority of spectator respondents at The 2010 Ryder Cup were male (79%), with higher proportions of females within the older age groups:

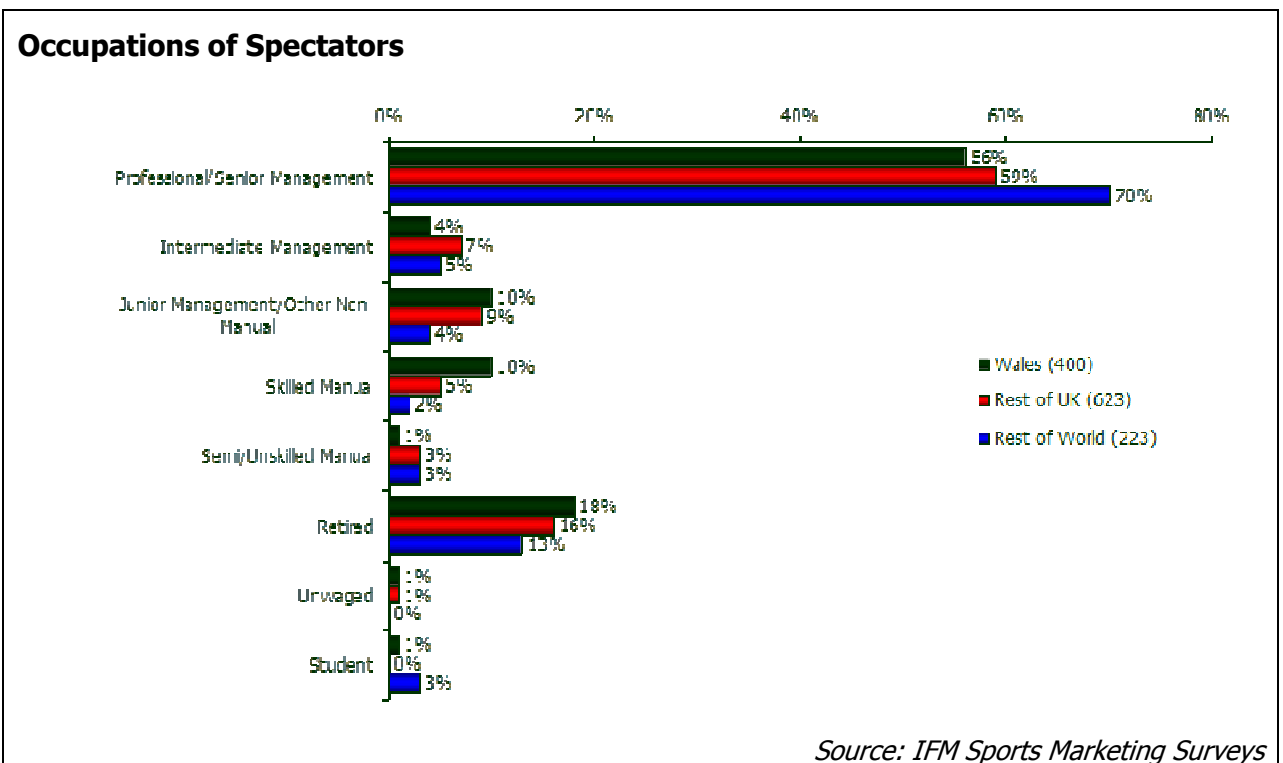


The 2010 Ryder Cup – Economic Impact Assessment

As shown, the majority of respondents are of a mid-career to pre-retirement age, from aged 35 to 64 years of age, with overseas respondents typically being older than UK and Welsh visitors.



The chart below confirms our expectations in that a far higher proportion of overseas visitors are professionals or currently hold senior management positions within their respective firms.



The 2010 Ryder Cup – Economic Impact Assessment

These top-level findings support our approach that the level of expenditure and consumption habits of the spectators at The 2010 Ryder Cup differ by source market, in that the overseas visitors will generally be older and of a higher socioeconomic class. This is in no way a reflection of the demographic profile of overseas versus UK markets but simply a reflection of the increased time and money required to attend such an international sporting event.

Based on extensive experience conducting economic impact assessments at international sporting events, our methodology anticipates and accounts for the differing expenditure levels and consumption habits of the various segments of The 2010 Ryder Cup spectator market. The following section presents our sizing and segmentation of the spectator market, which provides the foundation for the remainder of the spectator expenditure and economic impact assessment.

4.3.2. Spectator Market Sizing and Segmentation

The number of visitors attending and the number of admissions to The 2010 Ryder Cup (or any multi-day event) will provide two different figures. The figures differ because visitors may attend on more than one day, and each time they enter the event they are counted as one admission. Therefore if one person attends on four days, he or she will be counted as four admissions.

The 2010 Ryder Cup had a most effective system for collecting spectator information via requiring spectators to pre-register their attendance at the event, with their identity being recorded on their tickets via bar codes which were scanned upon entry. Even more importantly, the market from which the spectator had travelled to attend the event was also captured within the ticket booking system, such that the organiser was able to provide highly reliable data on the proportion of tickets sold to visitors from each market, as shown overleaf in Table 8.

The 2010 Ryder Cup – Economic Impact Assessment

Table 9 - Share of Ryder Cup Tickets Sold by Day and by Market

Economic Region	Tue	Wed	Thu	Fri	Sat	Sun	Mon*	Total
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Newport	4.4	3.1	3.5	1.6	1.7	1.9	1.9	2.5
South East Wales	27.5	24.6	27.6	16.5	12.5	17.5	17.5	19.9
Rest of Wales	14.3	11.8	10.7	6.7	6.1	7.1	7.1	8.8
Rest of UK	40.1	47.7	37.6	55.7	60.6	54.2	54.2	50.8
USA	3.4	3.2	5.2	4.9	4.8	4.8	4.8	4.5
Rest of World	10.3	9.6	15.5	14.6	14.3	14.5	14.5	13.6
Daily Totals:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Ryder Cup Europe LLP

*Ticket sales for Monday replicated the Sunday figures, as only those with Sunday tickets were allowed to return for Monday's play. The report focuses only on Tuesday to Sunday admissions.

The ratios of tickets sold by day and by market were applied to organiser data indicating that a total of 244,000 tickets were sold for The 2010 Ryder Cup. After re-balancing the data received, we estimated the total number of tickets sold by market and by day as shown below in Table 10:

Table 10 - Ryder Cup Attendance by Day and Market

Economic Region	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Total
Newport	1,182	903	1,248	599	749	671	653	6,005
South East Wales	7,418	7,142	9,934	6,260	5,365	6,300	6,125	48,544
Rest of Wales	3,860	3,430	3,854	2,544	2,642	2,556	2,485	21,371
Rest of UK	10,828	13,827	13,521	21,182	26,040	19,525	18,983	123,906
Overseas	3,712	3,697	7,443	7,415	8,204	6,948	6,755	44,174
Daily Totals:	27,000	29,000	36,000	38,000	43,000	36,000	35,000	244,000

Source: Ryder Cup Europe LLP

The 2010 Ryder Cup – Economic Impact Assessment

At The 2010 Ryder Cup, over 1,252 visitors were approached to determine their place of residence and eligibility for the research. This did include 42 from Newport but it must be noted that any expenditure by Newport residents does not count towards the economic impact. This ratio of Newport residents surveyed is broadly in line with the proportion of tickets sold to Newport residents, as reported by the organiser (2.5%) - which is to be expected within reliable random sampling.

Within most economic impact assessments conducted at major sporting events, the organisers - and by extension the analysts - do not have access to such detailed data on the market mix of attendance. However, this is the key driver of the entire economic impact assessment. It is therefore a high tribute to the organiser of The 2010 Ryder Cup that this key data which is fundamental to the estimation of the economic impact was collected via their ticketing systems and also made available to IFM Sports Marketing Surveys for the purposes of this study.

The economic impact model for this analysis uses survey-based estimates of the length of stay per segment of the market to convert the officially-reported ticket sales data to an attendance estimate. The total number of tickets sold to each segment of the market, as reported by respondents surveyed from each segment, is divided by the number of respondents per segment to yield average length of stay estimates. We then use the survey-based LOS (Length of Stay) estimate to work backwards from official ticket sales to an estimated number of unique attendees.

As shown in Table 11 overleaf, the 1,252 interviews conducted on-site have been segmented via the same regional criteria as the ticketing data from The Ryder Cup, with our survey data being used to estimate calculate the number of tickets per segment purchased by our respondents (i.e. 'Sampled Ticket Sales'). The average length of stay (LOS) was then calculated by dividing the total number of days that the respondents of each segment stayed at The 2010 Ryder Cup by the number of visitors surveyed per segment.

The 2010 Ryder Cup – Economic Impact Assessment

Table 11 - Ryder Cup Attendance, LOS and Market Size by Segment

Economic Region	Visitors Surveyed	Sampled Ticket Sales	Length of Stay	Total Ticket Sales	Total Attendance	Initial Data Weight
	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(Factor)</i>
Newport	42	95	2.3	6,005	2,655	63.2
South East Wales	219	428	2.0	48,544	24,839	113.4
Rest of Wales	108	169	1.6	21,371	13,657	126.5
Rest of UK	522	1,023	2.0	123,906	63,225	121.1
Overseas	361	1,190	3.3	44,174	13,401	37.1
Grand Total	1,252	2,905	2.3	244,000	117,777	94.1

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

In line with industry trends, the spectators travelling from abroad (3.3 days) tended to stay at The Ryder Cup for a longer period of time than spectators from within the UK (1.6 to 2.3 days), which provides a top-level validation for the survey-based LOS estimates.

Based on our estimated LOS per segment of the market, we estimate that there were 117,777 unique visitors to The 2010 Ryder Cup. The 13,401 international visitors drive the economic impact for the UK. The expenditure of international and 'Rest of UK' visitors both contribute to the economic impact for Wales, etc.

To re-iterate, the ratio of visitors from the various economic regions and the corresponding volumes represents the key driver of the spectator expenditure within the economic impact assessment. The 'Initial Data Weight' displayed in the last column of Table 11 above is the number of unique visitors to The Ryder Cup represented by each of the respondents surveyed (calculated as 'Total Attendance' / 'Visitors Surveyed'). This factor is used to 'gross up' the surveyed expenditure data to the total population of visitors to The 2010 Ryder Cup.

As this process of grossing up expenditure data occurs line by line, for each respondent, the model captures the variations in expenditure patterns within each segment of the market as well as for differently sized parties. As the 'Initial Data Weight' is intended for grossing up expenditure of each respondent to the total number of visitors to The Ryder Cup, additional adjustments are undertaken to the data weight where the respondent has undertaken expenditure on behalf of his or her party, such as in the case of hotel accommodation used by the entire group.

The 2010 Ryder Cup – Economic Impact Assessment

4.3.3. On-Site Expenditure at The 2010 Ryder Cup

As shown below in Table 12, the majority of the gross expenditure made by spectators on days when they attended The Ryder Cup was on merchandise.

Table 12 - Gross Spectator On-Site Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink	7,021	7,021	7,021	7,021
Programme ¹	800	800	800	800
Merchandise ²	8,412	8,412	8,412	8,412
Other	743	743	743	743
Total	16,975	16,975	16,975	16,975

Note: All spend included, regardless of accommodation location

¹ Programme sales all go to Ryder Cup Europe Ltd, local printing costs in contractor calculations

² Merchandise sales netted out as per ratio of vendors from within catchment

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The on-site gross expenditure is the same for all regions assessed because the expenditure all occurred on-site, within all of the catchments being assessed. However, as shown below in Table 13, the net expenditure per catchment differs substantially, as on-site expenditure by non-UK residents is netted out of the UK Direct Economic Impact shown below.

Table 13 - Direct Economic Impact of Spectators' On-Site Spend

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink	6,828	5,544	4,963	1,454
Programme ¹	-	-	-	-
Merchandise ²	-	421	1,195	2,728
Other	736	703	565	174
Total	7,565	6,669	6,722	4,356

Note: All spend included, regardless of accommodation location

¹ Programme sales all go to Ryder Cup Europe LLP, local printing costs in contractor calculations.

² Merchandise sales netted out as per ratio of vendors from within catchment

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

The merchandise vendors comprised businesses that operated on-site with the permission of the organiser. Their revenues were derived solely from the sale of goods and services on-site. So that there is no double-counting between the on-site spectator expenditure and the contractor analysis, the merchandise expenditure has been netted out as per the ratio of vendors from each catchment area. The programme expenditure has all been netted out to avoid double-counting as this revenue goes to the organiser, who then spends it via contracts, whose value has already been accounted within the economic impact model.

As shown below in Table 14, the **Total Economic Impact** of spectators' on-site expenditure on days when they were attending The Ryder Cup was £11.6 million for Newport and £10.3 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 14 - Total Economic Impact of Spectators' On-Site Spend

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink	10,516	8,538	7,643
Programme ¹	-	-	-
Merchandise ²	-	631	1,792
Other	1,112	1,062	853
Total	11,627	10,232	10,287

Note: All spend included, regardless of accommodation location

¹ Programme sales all go to Ryder Cup Europe LLP, local printing costs in contractor calculations

² Merchandise sales netted out as per ratio of vendors from within catchment

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.3.4. Local Travel Expenditure During The 2010 Ryder Cup

The data collection on transport expenditure excluded the cost of any public transport utilised in arriving in Newport due to concerns that this revenue might benefit the London-based headquarters rather than the Welsh or Newport destinations. Likewise, any ticket purchased would likely be a round-trip ticket, with the expenditure occurring within the visitors' place of residence or origin. The only exception in which public transport cost could have been included would be the case of a foreign visitor flying into a London airport and taking a train to Newport. In this case, the expenditure would have benefited the UK economy but not that of Wales.

In any case, our methodology has been conservative in excluding such types of expenditure. However, leakage would generally be removed from the Direct Economic Impact calculation but included in the gross calculation. Therefore, the gross travel expenditure presented below in Table 15 is an under-estimate.

Table 15 - Gross Spectator Expenditure on Local Transportation

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	205.2	528.9	566.9	732.0
Taxi	86.2	223.6	265.4	570.8
Total	291.4	752.5	832.3	1,032.8

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

Table 16 provides the Direct Economic Impact of local transportation. Car hire cost has been calculated as a one-off cost, with a share of expenditure netted out as per assumptions of the car hire cost generally being incurred at the airport of arrival, which may or may not be within the catchment in question.

Table 16 - Direct Economic Impact of Spectators' Local Transportation

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	51.3	264.5	425.2	504.9
Taxi	86.2	223.6	260.3	170.9
Total	137.5	488.1	685.5	675.8

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

As shown below, the **Total Economic Impact** of spectators' expenditure on local travel during The 2010 Ryder Cup was £0.2 million for Newport and £1.0 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 17 - Total Economic Impact of Spectators' Local Transportation

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	78.5	404.6	650.5
Taxi	131.9	342.1	398.3
Total	210.3	746.7	1,048.8

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

4.3.5. Off-Site Expenditure During The 2010 Ryder Cup

The most significant spectator impact generated on days when spectators were attending The 2010 Ryder Cup was from off-site expenditure, which included items such as hotel accommodation and Ryder Cup travel packages. These packages were estimated as one-off costs whereas the remaining off-site expenditure represented daily costs.

Off-site expenditure is estimated separately from on-site expenditure and local transport because this expenditure may or may not occur within the Newport market. All gross expenditure has been allocated to the catchment within which the accommodation was booked.

As shown, only a small proportion of off-site spectator expenditure entered the Newport market, at £4.4 million compared to £39.6 million of total off-site expenditure being made throughout the UK due to the staging of The 2010 Ryder Cup. Wales received £29.3 million of this gross expenditure, indicating that over £10.3 million was lost to the Wales market as a result of these attendees staying in accommodation in England rather than Wales.

Table 18 - Gross Off-Site Spectator Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Main Costs</u>				
Package Price ¹	1,594.5	15,312.7	16,537.7	21,739.0
Accommodation	1,322.4	5,425.5	5,823.7	8,134.3
Sub-Total:	2,916.9	20,738.1	22,361.4	29,873.4
<u>Additional Costs</u>				
Meals & Drinks	998.9	4,504.4	4,947.1	7,338.3
Groceries	114.7	221.9	232.4	249.4
Retail	260.1	1,098.3	1,200.8	1,505.0
Tourist	132.6	346.7	354.7	450.6
Other	20.0	151.2	154.4	164.6
Sub-Total:	1,526.4	6,322.5	6,889.4	9,707.9
Total:	4,443.4	27,060.7	29,250.8	39,581.3

Note: Expenditure attributed to primary accommodation location

¹ One-off purchase, not calculated per day and excluding ticket prices

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

After accommodation, meals and drinks constituted the second largest contribution to spectators' off-site expenditure.

The 2010 Ryder Cup – Economic Impact Assessment

Upon accounting for the origin of visitors to The 2010 Ryder Cup, the net impact of the off-site expenditure decreases substantially. As shown in Table 19, the Direct Economic Impact of off-site expenditure ranges from £4.4 million in Newport to £28.8 million for Wales. Because a substantial share of visitors to The 2010 Ryder Cup were from the rest of the UK, the net economic impact of the off-site expenditure declines substantially when the expenditure of UK visitors is netted out - falling to £18.9 million.

Table 19 - Direct Economic Impact of Spectator's Off-Site Spend

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Main Costs</u>				
Package Price ¹	1,594.5	15,312.7	16,348.0	10,897.4
Accommodation	1,322.4	5,425.5	5,743.9	3,670.6
Sub-Total:	2,916.9	20,738.1	22,091.9	14,567.9
<u>Additional Costs</u>				
Meals & Drinks	991.5	4,488.2	4,769.8	2,620.4
Groceries	114.7	220.8	216.1	131.4
Retail	260.1	1,095.5	1,191.7	1,040.0
Tourist	132.6	346.7	354.7	372.6
Other	19.5	150.7	151.4	115.0
Sub-Total:	1,518.5	6,302.0	6,683.6	4,279.4
Total:	4,435.4	27,040.1	28,775.4	18,847.4

Note: Expenditure attributed to primary accommodation location

¹ One-off purchase, not calculated per day

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 20 - Total Economic Impact of Spectators' Off-Site Spend

Type of Expenditure	Newport <i>(GBP '000s)</i>	South East Wales <i>(GBP '000s)</i>	Wales <i>(GBP '000s)</i>
<u>Main Costs</u>			
Package Price ¹	2,439.6	23,428.4	25,012.4
Accommodation	2,036.5	8,355.2	8,845.6
Sub-Total:	4,476.1	31,783.6	33,858.0
<u>Additional Costs</u>			
Meals & Drinks	1,526.9	6,911.9	7,345.5
Groceries	172.1	331.2	324.1
Retail	390.1	1,643.3	1,787.5
Tourist	202.9	530.5	542.7
Other	29.5	227.6	228.6
Sub-Total:	2,321.6	9,644.4	10,228.3
Total:	6,797.7	41,428.0	44,086.3

Note: Expenditure attributed to primary accommodation location

¹ One-off purchase, not calculated per day

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

As shown above in Table 20, the **Total Economic Impact** of spectators' off-site spend during The 2010 Ryder Cup was £6.8 million for Newport and £44.1 million for Wales, after accounting for the indirect and induced effects.

4.3.6. Extended Stay Expenditure Pre- or Post-Ryder Cup

After attending The 2010 Ryder Cup, a substantial share of visitors went on to enjoy a holiday elsewhere in Wales, making best use of the opportunity to see other local attractions. Whilst some visitors stayed on in the Newport area, most took up accommodation in another area of Wales or England where there would be new sights to visit.

The extended stay expenditure was allocated to the visitors' new place of accommodation. As shown below in Table 21, £125,600 of additional expenditure was yielded by Newport during post-event holidays. This gross expenditure was substantially higher for the UK at £2.2 million, which may reflect the visitors' higher awareness of UK-based attractions or the practicality of returning towards England-based airports for the remainder of the holiday. However, it is heartening to note that Wales captured £1.0 million of additional holiday expenditure, even with The Celtic Manor Resort being so close to the England border, which in itself would facilitate leakage of post-event holidays out of the local market.

Table 21 - Gross Spectator Expenditure Extended Stay

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	47.0	336.3	438.9	1,140.3
Meals & Drinks	27.4	217.0	293.1	642.9
Groceries	8.5	64.3	80.7	83.0
Retail	2.2	60.1	89.8	168.4
Tourism	40.4	64.6	64.6	86.4
Golf Fees	-	24.7	72.6	110.3
Other	-	6.7	6.7	14.1
Total:	125.6	773.7	1,046.3	2,245.4

Note: Expenditure attributed to the location of accommodation pre- or post-Ryder Cup

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

As shown below, the spectators continuing their holidays elsewhere in Wales after the end of The Ryder Cup were generally not from Wales, such that the Direct Economic Impact of this spend is precisely equal to the gross expenditure. Indeed, one would expect Welsh residents visiting The Ryder Cup to return home after the event rather than undertake any further holidays within their own country.

Table 22 - Direct Economic Impact of Extended Stays

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	47.0	336.3	438.9	737.4
Meals & Drinks	27.4	217.0	293.1	495.8
Groceries	8.5	64.3	80.7	30.9
Retail	2.2	60.1	89.8	145.4
Tourism	40.4	64.6	64.6	42.4
Golf Fees	-	24.7	72.6	110.3
Other	-	6.7	6.7	14.1
Total:	125.6	773.7	1,046.3	1,576.3

Note: Expenditure attributed to primary accommodation location

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

However, there were substantial UK residents whose extended stays were netted out of the Direct Economic Impact calculation, such that the impact of spectators' extended stays on the UK declined from £2.2 million gross to £1.6 million net.

As shown overleaf, the **Total Economic Impact** of spectators' expenditure on extended stays during The 2010 Ryder Cup was £192,600 for Newport and £1.6 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

The 2010 Ryder Cup – Economic Impact Assessment

Table 23 - Total Economic Impact of Spectators' Extended Stays

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	72.4	517.9	675.8
Meals & Drinks	42.2	334.1	451.3
Groceries	12.7	96.5	121.0
Retail	3.3	90.2	134.7
Tourism	61.9	98.8	98.8
Golf Fees	-	37.9	111.1
Other	-	10.1	10.1
Total:	192.6	1,185.4	1,602.9

Note: Expenditure attributed to primary accommodation location

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

It is interesting to note that over half of the golf expenditure on green fees spent by Ryder Cup visitors after the event was spent within Wales. It would seem that The 2010 Ryder Cup has increased visitors' appetite for Welsh golf. Approximately £111,100 was spent by Ryder Cup visitors on green fees at Welsh golf courses shortly following the event.

4.3.7. Total Spectator Expenditure

As shown the gross spectator expenditure associated with the staging of The 2010 Ryder Cup was £59.8 million within the UK, with £48.1 million of this money being spent within Wales.

Table 24 - Summary of Spectators' Gross Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	16,975.4	16,975.4	16,975.4	16,975.4
Local Transportation	291.4	752.5	832.3	1,032.8
Off-Site Spend	4,443.4	27,060.7	29,250.8	39,581.3
Extended Stays	125.6	773.7	1,046.3	2,245.4
Total:	21,835.7	45,562.3	48,104.8	59,834.9

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

After netting out expenditure by local residents, the Direct Economic Impact of spectator expenditure declines to £25.5 million for the UK and £37.2 million for Wales, as shown below. This represents a substantial economic impact, with this economic impact being highly concentrated within South East Wales which absorbed £35.0 million of this expenditure. Therefore only £2.2 million of Direct Economic Impact benefited the rest of Wales, which is to be expected based on the location of the event.

Table 25 - Summary of Spectators' Direct Economic Impact

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	7,564.7	6,668.5	6,722.1	4,355.6
Local Transportation	137.5	488.1	685.5	675.8
Off-Site Spend	4,435.4	27,040.1	28,775.4	18,847.4
Extended Stays	125.6	773.7	1,046.3	1,576.3
Total:	12,263.2	34,970.4	37,229.3	25,455.1

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The **Total Economic Impact** of spectators' expenditure during The 2010 Ryder Cup was £18.8 million for Newport and £57.0 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 26 - Summary of Spectators' Total Economic Impact

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	11,627.5	10,231.6	10,287.3
Local Transportation	210.3	746.7	1,048.8
Off-Site Spend	6,797.7	41,428.0	44,086.3
Extended Stays	192.6	1,185.4	1,602.9
Total:	18,828.1	53,591.7	57,025.3

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.4. Hospitality Expenditure

The expenditure of corporate guests has been calculated separately to that of spectators because their spending patterns differ significantly.

No corporate guests were interviewed at the event, but surveys were issued to hospitality organisers post event to ascertain detailed and accurate organisation spend and estimates for guest and host expenditure at event and off site including accommodation. 172 hospitality surveys were administered, with 42 surveys being completed by purchasers of Ryder Cup corporate hospitality.

4.4.1. Corporate Hospitality Market Sizing & Segmentation

Corporate hospitality expenditure includes both corporate staff present at The 2010 Ryder Cup in order to host their guests as well as the guests being hosted. Each of these markets were separately sized and segmented in order to provide a solid foundation for the estimation of economic impact of corporate expenditure.

Figures provided by Ryder Cup Europe LLP show that over the six days of The Ryder Cup there were 16,695 admissions into the corporate pavilions, with 15,441 of these being comprised of corporate guests. Based on survey data estimating the average length of stay (LOS) of corporate guests being 1.4 days, we have estimated that there were approximately 11,390 unique corporate guests in attendance at The 2010 Ryder Cup.

The 2010 Ryder Cup – Economic Impact Assessment

Table 27 - Corporate Guests Admissions & Attendance by Pavilion

Location	Total Guest & Staff Days	Total Guest Only Days	Average LOS	Total Guests
	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>
Past Captains	2,130	1,770	1.7	1,055
Harlech Pavilion	7,263	7,108	1.2	6,130
Caerffili Pavilion	2,040	1,818	1.5	1,202
Conwy Club	1,854	1,587	1.3	1,185
Kidwelly Pavilion	3,408	3,158	1.7	1,821
Total:	16,695	15,441	1.4	11,393

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Based on survey data, we have estimated the share of guests in each pavilion by their market of origin. This data in turn allows us to calculate the net and gross economic impact, filtering out expenditure as appropriate. The estimated size of each segment of The 2010 Ryder Cup's corporate market are presented below.

Table 28 - Corporate Guests by Pavilion and Region of Origin

Location	Newport	Rest of South East Wales	Rest of Wales	Rest of UK	Overseas	Total Guests
	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>
Past Captains	11	63	-	695	286	1,055
Harlech Pavilion	-	28	310	4,710	1,081	6,130
Caerffili Pavilion	-	49	45	935	173	1,202
Conwy Club	96	-	-	909	181	1,185
Kidwelly Pavilion	-	-	15	1,438	367	1,821
Total:	107	140	370	8,687	2,088	11,392

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The same analysis was undertaken with regards to corporate staff hosting guests at The 2010 Ryder Cup, with their average length of stay estimated via survey research in order to calculate the unique number of corporate staff in attendance. We have estimated that the 1,254 staff

The 2010 Ryder Cup – Economic Impact Assessment

admissions reported by The Ryder Cup comprise 512 unique staff attending an average of 2.4 days, with length of stay and attendance varying by pavilion.

Table 29 - Corporate Staff Admissions & Attendance by Pavilion

Location	Staff Admissions	Average LOS	Total Staff Attendance
	(#)	(#)	(#)
Past Captains	360	3.0	119
Harlech Pavilion	155	3.8	40
Caerffili Pavilion	222	1.6	136
Conwy Club	267	1.9	141
Kidwelly Pavilion	250	3.3	76
Total	1,254	2.4	512

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Likewise, we have used survey data to estimate the market of origin of the corporate staff. The importance of running these estimates separately for corporate staff and guests cannot be under-estimated, given that the corporate staff will have different corporate addresses and may be from separate catchment areas.

Below we have provided our estimated breakdown of the market of origin of the corporate staff within each pavilion. Interestingly, our survey indicates that whilst there were corporate staff present from South East Wales, there were negligible numbers of staff present from the rest of Wales. The region boasting the most corporate staff was the rest of the UK.

Table 30 - Corporate Staff by Pavilion and Region of Origin

Location	Newport	Rest of SE Wales	Rest of Wales	Rest of UK	Overseas	Total Staff
	(#)	(#)	(#)	(#)	(#)	(#)
Past Captains	-	20	-	60	40	119
Harlech Pavilion	-	4	-	31	4	40
Caerffili Pavilion	-	23	-	91	23	136
Conwy Club	-	16	-	125	-	141
Kidwelly Pavilion	10	10	-	25	30	75
Total:	10	73	-	332	97	512

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The remaining corporate hospitality estimations will proceed on the basis of the above market segmentation and sizing. However, as the dataset of corporate expenditure is much smaller

The 2010 Ryder Cup – Economic Impact Assessment

than either the spectator or volunteer survey, the analysis will proceed on the basis of average expenditures, netting out expenditure based on the ratio of guests or staff from each source market.

It must be noted that organisers were not able to provide details of any extended stays made by guests and therefore this is not included in the analysis.

4.4.2. Corporate Hospitality Expenditure & Economic Impact

The corporate hospitality expenditure associated with The 2010 Ryder Cup ranged from £2.5 million at Newport to £9.6 million for the UK. The gross expenditure is allocated by market according to the location of the accommodation used for the hospitality. It would appear that many of the companies purchasing hospitality at The 2010 Ryder Cup are from the UK and have opted for accommodation on the English side of the border, which would explain why the gross expenditure in the UK is nearly double that of South East Wales.

Table 31 - Gross Corporate Hospitality Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Guests				
Accommodation	1,663.7	3,596.8	3,596.8	4,822.1
F&B Spend*	224.3	796.8	796.8	1,211.2
Sub-Total:	1,888.0	4,393.6	4,393.6	6,033.3
Staff				
Accommodation	60.5	223.8	223.8	368.0
F&B Spend	14.4	59.1	59.1	106.7
Sub-Total:	74.9	282.9	282.9	474.6
Additional Events	587.2	1,267.1	1,947.1	3,090.6
Total:	2,550.1	5,943.6	6,623.6	9,598.6

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

*Food & Beverage

Whilst the substantial cross-border expenditure is of benefit to England, there is scope for considering how to minimise cross-border expenditure in the future, should the objective in hosting international sporting events be to drive economic impact for the host economy. However, when we net out the corporate hospitality expenditure of those firms that are from the UK, we find that the UK Direct Economic Impact falls well below that of Wales.

The 2010 Ryder Cup – Economic Impact Assessment

Table 32 - Direct Economic Impact of Corporate Hospitality

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Guests				
Accommodation	1,663.1	3,544.9	3,390.3	864.4
F&B Spend	223.9	781.2	752.2	226.5
Sub-Total:	1,887.1	4,326.0	4,142.5	1,090.9
Staff				
Accommodation	60.3	190.1	190.1	77.7
F&B Spend	14.0	49.9	49.9	22.7
Sub-Total:	74.3	240.0	240.0	100.4
Additional Events	581.7	1,239.7	1,841.6	566.5
Total:	2,543.1	5,805.7	6,224.2	1,757.8

F&B = Food & Beverage

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The Direct Economic Impact of Ryder Cup hospitality on the UK economy falls from £9.6 million to £1.8 million after netting out the impact of UK corporate expenditure. Whilst the Wales Direct Economic Impact, at £6.2 million, now compares more favourably with that of the UK, it would have been possible to drive the Welsh Direct Economic Impact of the corporate expenditure far higher had the UK firms purchasing hospitality all used accommodation within Wales.

The 2010 Ryder Cup – Economic Impact Assessment

The **Total Economic Impact** of corporate hospitality at The 2010 Ryder Cup expenditure was £3.9 million for Newport and £9.6 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 33 - Total Economic Impact of Corporate Hospitality

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Guests</u>			
Accommodation	2,561.2	5,459.1	5,221.1
F&B Spend	344.9	1,203.0	1,158.4
Sub-Total:	2,906.1	6,662.1	6,379.5
<u>Staff</u>			
Accommodation	92.8	292.8	292.8
F&B Spend	21.6	76.8	76.8
Sub-Total:	114.4	369.6	369.6
Additional Events	895.8	1,909.1	2,836.1
Total:	3,916.3	8,940.8	9,585.3

F&B = Food & Beverage

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.5. Volunteer Expenditure

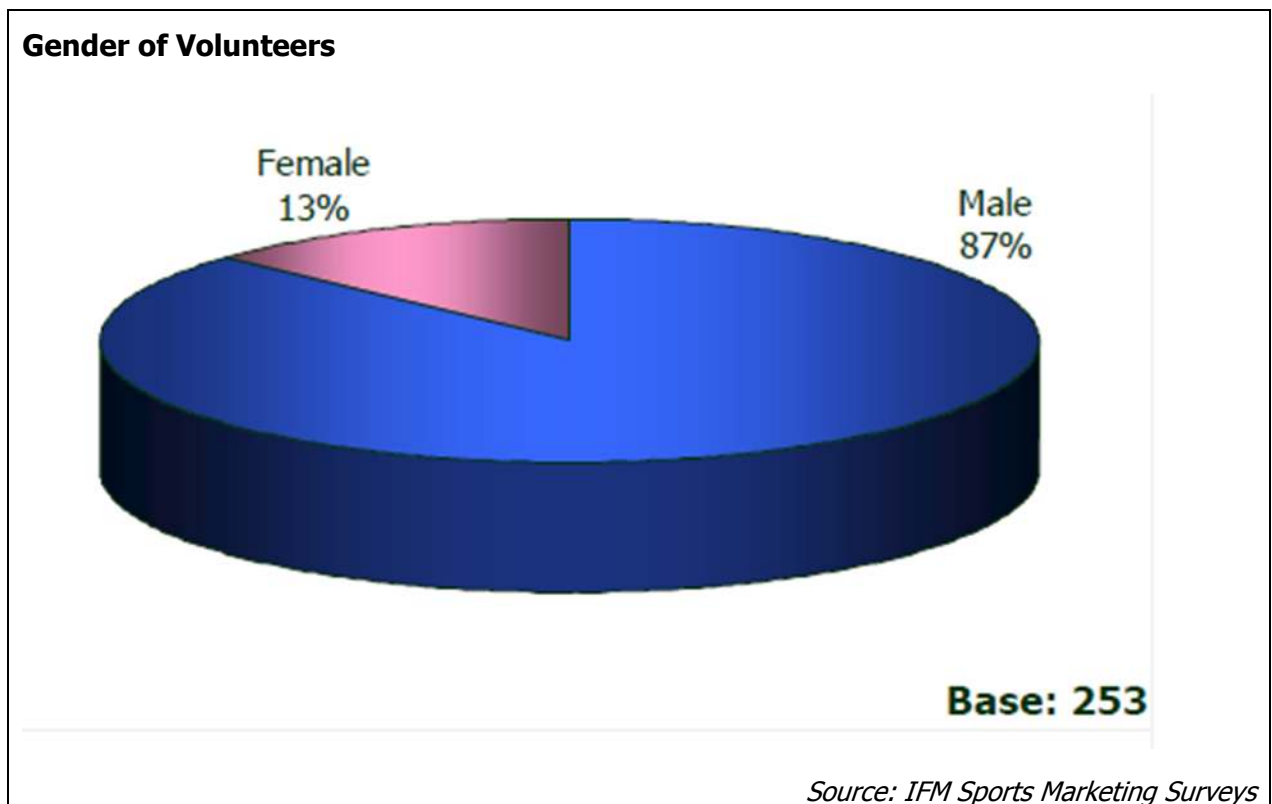
With c1600 volunteers working at The 2010 Ryder Cup, expenditure of this sub-group also had an important economic impact within the catchment areas.

Volunteers were not approached at The Ryder Cup as they were working so data was gathered through an online post-event survey distributed by Ryder Cup Europe LLP and returned to IFM Sports Marketing Surveys. Over 254 surveys were completed online by Ryder Cup volunteers.

4.5.1. Volunteer Profile

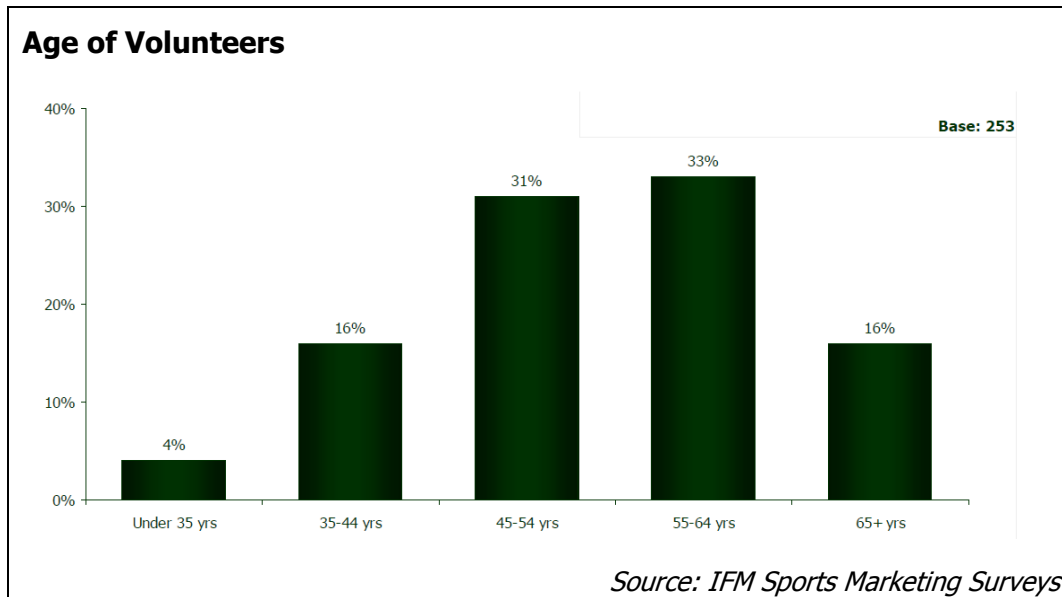
In addition to the expenditure questions, volunteers were also asked several other questions including information about their age, occupation and household income to assist in segmenting this important source of expenditure.

As was the case within the spectator expenditure group, the majority (87%) of the volunteer respondents were male.

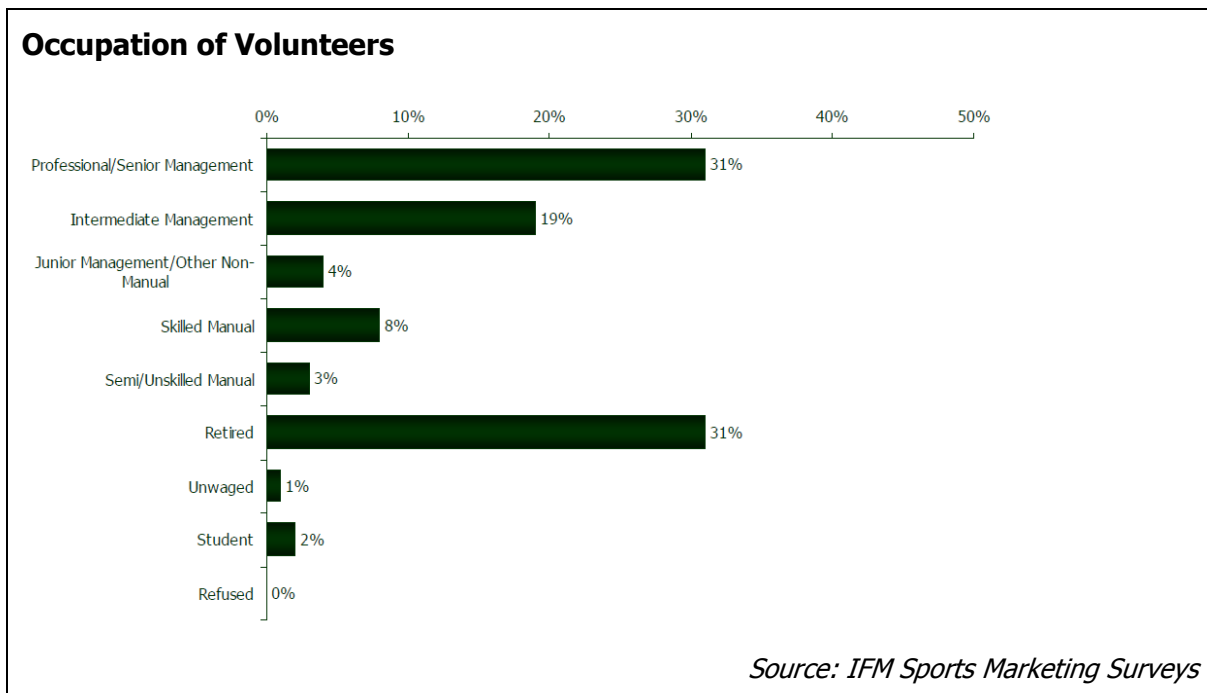


The 2010 Ryder Cup – Economic Impact Assessment

As shown below, nearly two-thirds of the volunteer respondents were between age 45 and 64, being in the peak of their respective careers or approaching retirement.



The chart below illustrates the high socio-economic standing of the volunteers surveyed, with 31% working in professional or senior management positions.



This data serves to validate the expenditure claimed by the volunteers in the survey, though the spending power of retired volunteers is unclear without further clarification of their pre-retirement career. It is useful to note that a further 19% of the volunteers surveyed hold

The 2010 Ryder Cup – Economic Impact Assessment

intermediate management positions, such that half of the volunteers surveyed are of a fairly senior position.

4.5.2. Volunteer Market Segmentation and Sizing

Whilst the attendance at international sporting events is often reported in terms of tickets sold, the number of volunteers has been tracked by unique accreditations. Whilst volunteers generally remained on-site for various days, each volunteer was counted only once within the data provided by the organisers for the purpose of this analysis.

There were 1,600 volunteers assisting with the staging of The 2010 Ryder Cup. Whilst few of these volunteers were from Newport, nearly one third were from South East Wales and half from the rest of the UK.

Table 34 - Ryder Cup Volunteers by Source Market

Economic Region	Market Mix	Volunteer Volumes
	<i>(%)</i>	<i>(#)</i>
Newport	5.0	80
Rest of South East Wales	30.0	480
Rest of Wales	5.0	80
Rest of UK	50.0	800
Europe	5.0	80
USA	5.0	80
Total:	100.0	1600

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Because expenditure from volunteers living within a particular catchment area do not count towards its economic impact, the ratio of volunteers from each catchment area is a key driver of the economic impact assessment. As is also the case within our spectator economic impact model, the volunteer model segments volunteers based on their market of origin, then applies 'data weights' to 'scale up' the volunteers accordingly.

The 2010 Ryder Cup – Economic Impact Assessment

As shown in Table 35, only 6 volunteers from Newport were surveyed. These volunteers represent the total of 80 volunteers from Newport assisting in the staging of The 2010 Ryder Cup. Therefore, each of the Newport volunteers surveyed count for 13.3 volunteers (80/6). The expenditure of Newport volunteers is therefore 'grossed up' by a factor of 13.3 in calculating their contribution to the gross expenditure at The Ryder Cup.

Table 35 - Volunteer Market Sizing and Segmentation

Row Labels	Volunteers Surveyed	Days On-Site	Length of Stay	Attendance	Initial Data Weight
	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(#)</i>	<i>(Factor)</i>
Newport	6	39	6.5	80	13.333
Southeast Wales	44	287	6.5	480	10.909
Rest of Wales	25	176	7.0	80	3.200
Rest of UK	148	1,002	6.8	800	5.405
International	31	197	6.4	160	5.161
Grand Total:	254	1,701	6.7	1,600	6.299

Sources: The Ryder Cup LLC and IFM Sports Marketing Surveys

Again, this approach is far more accurate and robust than the approach often taken in economic impact assessments of simply multiplying the average expenditure by the number of visitors because the expenditure patterns within each segment of the market will differ, with international volunteers likely having a greater amount of disposable income to facilitate their travel to Wales to participate in the staging of The Ryder Cup.

Likewise, this line-by-line model which separately estimates each respondent's contribution to the total economic impact allows for more precise filtering of expenditure by source market, location of accommodation, etc.

4.5.3. On-Site Volunteer Expenditure at The 2010 Ryder Cup

Interestingly, the majority of the valid expenditure made by volunteers on days when they attended The Ryder Cup was on Merchandise. There was no difference between the gross expenditure of volunteers by economic region. This is because all on-site spend was attributed to the Newport market and by extension was also attributed to the larger economic regions in which Newport is located.

Table 36 - Gross Volunteer Expenditure On-Site

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink	341.8	341.8	341.8	341.8
Programme ¹	30.8	30.8	30.8	30.8
Merchandise ²	1,040.8	1,040.8	1,040.8	1,040.8
Other	51.1	51.1	51.1	51.1
Total	1,464.5	1,464.5	1,464.5	1,464.5

Note: All spend included regardless of accommodation location.

¹ Programme sales all go to Ryder Cup Europe LLP, local printing costs in contractor calculations.

² Merchandise sales netted out as per ratio of vendors from within catchment.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Upon accounting for the ratio of volunteers from the respective economic regions for which an economic impact is being assessed, there emerges substantial variation in economic impact by region.

Table 37 - Direct Economic Impact of Volunteers' On-Site Spend

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink	325.3	230.7	219.6	45.9
Programme ¹	-	-	-	-
Merchandise ²		42.2	118.7	149.1
Other	49.4	45.3	44.0	6.4
Total:	374.7	318.3	382.2	201.4

Note: All spend included regardless of accommodation location.

¹ Programme sales all go to Ryder Cup Europe LLP, local printing costs in contractor calculations.

² Merchandise sales netted out as per ratio of vendors from within catchment.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

The expenditure on programmes is netted out completely as these monies go directly to the organiser, who spends them on contracts in order to host the event. As we are already accounting for the value of contracts, the programme revenues are excluded in order to avoid double-counting. Likewise, the expenditure on merchandise is reduced substantially in line with the proportion of merchandise vendors from the various catchments. Where merchandise vendors are based within the local catchment, their sales revenues benefit the local economy. In cases where the vendors are based outside of the catchment, volunteer expenditure on merchandise constitutes leakage and does not benefit the economy.

The **Total Economic Impact** of volunteers' on-site expenditure during The 2010 Ryder Cup was £0.6 million for Newport and £0.5 million for SE Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 38 - Total Economic Impact of Volunteers' On-Site Spend

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Food & Drink Programme ¹	501.0	355.3	338.2
Merchandise ²	-	-	-
Other	74.5	63.4	178.0
	68.4	66.4	66.4
Total	575.6	487.1	582.6

Note: All spend included regardless of accommodation location

¹ Programme sales all go to Ryder Cup Europe LLP, local printing costs in contractor calculations

² Merchandise sales netted out as per ratio of vendors from within catchment

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.5.4. Local Transport Expenditure During The 2010 Ryder Cup

Car hire comprised the largest component of volunteers' local travel expenditure. Car hire was estimated as being a one-off, rather than a daily purchase, with taxis being estimated based on average daily cost.

Table 39 - Gross Volunteer Expenditure on Local Transportation

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	9.3	17.8	19.4	26.7
Taxi	0.5	3.0	9.2	9.2
Total	9.8	20.8	28.6	35.9

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

All gross local transport expenditure has been allocated according to the location of the volunteers' accommodation, which is why there is a dramatic variance in gross expenditure by economic region - with £35,900 of expenditure within the UK and only £9,800 of expenditure within Newport itself.

After accounting for the place of residence of the volunteers, the economic impact of local transportation by region varies even more widely, with the impact on Newport coming in at only £2,900 whilst the UK figure remaining virtually unchanged.

Table 40 - Direct Economic Impact of Volunteers' Local Transportation

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	2.3	8.9	14.5	26.7
Taxi	0.5	3.0	9.2	9.2
Total	2.9	11.9	23.7	35.9

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The **Total Economic Impact** of volunteers' local transportation expenditure during The 2010 Ryder Cup was £4,400 for Newport and £36,300 for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

The 2010 Ryder Cup – Economic Impact Assessment

Table 41 - Total Economic Impact of Volunteers' Local Transportation

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Car Hire ¹	3.6	13.6	22.2
Taxi	0.8	4.6	14.1
Total	4.4	18.2	36.3

¹ Note: One-off purchase, not daily.

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Relative to other types of expenditure, the total economic impact of volunteers' local transport is fairly insignificant, but is included in the present model for sake of consistency.

4.5.5. Off-Site Expenditure During The 2010 Ryder Cup

The most significant economic impact generated by volunteers was via their off-site expenditure, which includes elements such as hotel accommodation. The aggregate gross off-site expenditure of volunteers ranged from a total of £255,400 for Newport to £1.0 million for the UK as a whole.

Table 42 - Gross Off-Site Volunteer Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Main Costs</u>				
Package Price ¹	83.9	315.6	344.3	389.3
Accommodation	51.3	167.3	179.7	210.6
Sub-Total:	135.2	482.9	523.9	599.9
<u>Additional Costs</u>				
Meals & Drinks	53.5	194.1	198.7	224.0
Groceries	21.8	50.1	51.5	57.1
Retail	13.1	48.6	52.8	58.5
Tourism	10.3	51.7	52.2	55.9
Other	21.4	30.3	30.3	32.3
Sub-Total:	120.2	374.7	385.4	427.6
Total:	255.4	857.6	909.3	1,027.5

Note: Attributed to primary accommodation location

¹ One-off purchase, not calculated per day

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

Many of the volunteers sourced accommodation outside of Wales. Volunteers may have been more price-sensitive than spectators in that they secure free admission via contributing their time to the staging of the event.

The Direct Economic Impact of the volunteers' aggregate off-site expenditure ranges from £253,800 for Newport to £858,100 for Wales. The net economic impact of the volunteers' off-site expenditure on the UK declines dramatically to £363,000 because many of the volunteers reside within the UK, such that their expenditure is netted out of the economic impact estimate.

Table 43 - Direct Economic Impact of Volunteers' Off-Site Spend

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Main Costs</u>				
Package Price ¹	83.9	311.9	331.2	170.6
Accommodation	51.3	166.5	171.2	74.2
Sub-Total:	135.2	478.4	502.4	244.8
<u>Additional Costs</u>				
Meals & Drinks	53.1	191.8	184.9	53.1
Groceries	21.7	49.9	45.8	10.8
Retail	12.4	47.0	47.7	24.0
Tourist	10.1	51.5	49.2	25.0
Other	21.4	30.3	28.1	5.2
Sub-Total:	118.6	370.5	355.7	118.2
Total:	253.8	848.9	858.1	363.0

Note: Attributed to primary accommodation location

¹ One-off purchase, not calculated per day

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The **Total Economic Impact** of volunteers' off-site expenditure during The 2010 Ryder Cup was £388,000 for Newport and £1.3 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

The 2010 Ryder Cup – Economic Impact Assessment

Table 44 - Total Economic Impact of Volunteers' Off-Site Spend

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
<u>Main Costs</u>			
Package Price ¹	128.4	477.2	506.8
Accommodation	79.0	256.5	263.6
Sub-Total:	207.4	733.7	770.4
<u>Additional Costs</u>			
Meals & Drinks	81.8	295.3	284.7
Groceries	32.5	74.9	68.7
Retail	18.5	70.5	71.6
Tourist	15.4	78.8	75.2
Other	32.3	45.7	42.4
Sub-Total:	180.6	565.2	542.7
Total:	388.0	1,298.9	1,313.1

Note: Attributed to primary accommodation location

1 One-off purchase, not calculated per day

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Relative to the economic impact of the spectators' off-site expenditure, the volunteers' expenditure is of a modest scale. However, it has been included in the present economic impact assessment in the interests of providing a comprehensive and consistent estimation.

4.5.6. Extended Stay Expenditure Pre- or Post-Ryder Cup

There was modest expenditure by volunteers on holidays before or after The 2010 Ryder Cup, with this aggregate expenditure ranging from £10,000 in Newport to £109,000 across the UK. The variation in gross expenditure is due to the aggregate expenditure being allocated as per the location of the accommodation booked for the remainder of the volunteers' holiday in the UK.

Most of the volunteers continued their holiday elsewhere in the UK affording the opportunity to take in new sights. It is interesting to note that over one third of the post-event holiday expenditure was incurred within Wales.

The 2010 Ryder Cup – Economic Impact Assessment

Table 45 - Gross Volunteer Expenditure on Extended Stays

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	3.8	11.0	12.8	61.0
Meals & Drinks	4.5	13.2	15.1	22.9
Groceries	0.6	2.0	2.2	3.3
Retail	0.6	1.4	3.3	7.6
Tourism	-	1.0	1.0	6.6
Golf Fees	0.5	6.1	6.3	7.0
Other	-	0.4	0.7	0.7
Total:	10.0	35.2	41.4	109.0

Note: Expenditure attributed to the location of accommodation pre- or post-Ryder Cup

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Nearly all of the volunteers extending their holiday in Wales beyond the end of The 2010 Ryder Cup were residents of the rest of the UK or were from abroad. It is to be expected that Welsh volunteers would most likely return to their homes following the event rather than undertake any further overnight holidays within their own country.

Table 46 - Direct Economic Impact of Volunteers' Extended Stays

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	3.8	11.0	12.8	52.4
Meals & Drinks	4.5	13.2	14.2	10.7
Groceries	0.6	2.0	2.2	1.4
Retail	0.6	1.4	3.3	6.2
Tourism	-	1.0	1.0	6.6
Golf Fees	0.5	6.1	6.3	0.2
Other	-	0.4	0.4	-
Total:	10.0	35.2	40.2	77.6

Note: Expenditure attributed to the location of accommodation pre- or post-Ryder Cup

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

However, substantial pre or post-event holiday expenditure of volunteers has been netted out of the UK Direct Economic Impact, as nearly 90% of the volunteers were from the UK, such that any holidays that they may have taken following the event did not constitute new money being brought into the UK. However, the 10% of volunteers who were from abroad contributed an estimated £77,600 in Direct expenditure from their post-event holiday activities.

The 2010 Ryder Cup – Economic Impact Assessment

The **Total Economic Impact** of volunteers' extended stay expenditure was £15,400 for Newport and £61,600 for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 47 - Total Economic Impact of Extended Stays

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Accommodation	5.9	17.0	19.7
Meals & Drinks	6.9	20.3	21.8
Groceries	0.9	3.0	3.3
Retail	0.9	2.1	5.0
Tourism	-	1.6	1.6
Golf Fees	0.7	9.3	9.6
Other	-	0.6	0.6
Total:	15.4	53.9	61.6

Note: Expenditure attributed to the location of accommodation pre- or post-Ryder Cup

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.5.7. Total Volunteer Expenditure

The volunteers at The 2010 Ryder Cup not only contribute freely of their time to the staging of the event, but often come from outside of the local catchment area, spending their own funds on accommodation, etc, contributing an important, if quantitatively smaller amount than the spectators.

The gross expenditure associated with the volunteers visit to The 2010 Ryder Cup ranges from £2.1 million for Newport to £3.4 million for the whole of the UK. The on-site volunteer expenditure actually accounts for a larger aggregate expenditure than off-site, which seems counter-intuitive given the high cost of accommodation during international sporting events.

The 2010 Ryder Cup – Economic Impact Assessment

Table 48 - Summary of Volunteers' Gross Expenditure

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	1,464.5	1,464.5	1,464.5	1,464.5
Local Transportation	397.0	778.0	781.2	822.6
Off-Site Spend	255.4	857.6	909.3	1,027.5
Extended Stays	10.0	35.2	41.4	109.0
Total:	2,126.9	3,135.3	3,196.4	3,423.6

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

However, upon closer inspection, this pattern in the data is most sensible. Of the 254 volunteers surveyed, 83 did not make use of any overnight accommodation, driving from their residences on a daily basis to perform their duties at the event. Another 66 volunteers stayed with friends or relatives, thus avoiding any accommodation costs. Those that did make use of accommodation may have sought more distant and affordable accommodation. Rather than spending funds on accommodation, the volunteers preferred to purchase memorabilia to commemorate their being part of the staging of an international sporting event.

The Direct Economic Impact of the volunteers' expenditure ranges from £0.6 million for Newport to £1.3 million for Wales, with the impact declining sharply for the UK given the low proportion of volunteers coming from abroad.

Table 49 - Summary of Volunteers' Direct Economic Impact

Type of Expenditure	Newport	South East Wales	Wales	UK
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	374.7	318.3	382.2	201.4
Local Transportation	2.8	11.9	23.7	35.9
Off-Site Spend	253.8	848.9	858.1	363.0
Extended Stays	10.0	35.2	40.2	77.6
Total:	641.3	1,214.3	1,304.2	677.9

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

The 2010 Ryder Cup – Economic Impact Assessment

The **Total Economic Impact** of volunteers' Ryder Cup expenditure was £1.0 million for Newport and £2.0 million for Wales, after accounting for the indirect and induced effects. No Total Economic Impact figures are provided for the UK as comparative multipliers are not available.

Table 50 - Summary of Volunteers' Total Economic Impact

Type of Expenditure	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
On-Site Spend	575.6	487.1	582.6
Local Transportation	4.4	18.2	36.3
Off-Site Spend	388.0	1,298.9	1,313.1
Extended Stays	15.4	53.9	61.6
Total:	983.4	1,858.1	1,993.6

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

4.6. Contractors Expenditure

Ryder Cup Europe LLP provided a list of contractors (as well as their own organisational spend) involved in supplying goods and services that contributed to the smooth organisation and running of The 2010 Ryder Cup.

For firms based within the catchment area, the economic impact generated is equal to the value of the contract they held with Ryder Cup Europe LLP. For those outside the catchment area, only the proportion of the value of the contract that was spent inside the catchment area can be deemed a net economic impact. However, the wages of those employees who live within the catchment area but work for companies based outside the catchment area also contribute towards the economic impact.

The present economic impact assessment did not include any surveys of contractor employees to determine the extent of wages that were paid into the catchment area by contractors based on the outside. Therefore, the present EIA is erring on the conservative side in this regard.

Ryder Cup Europe LLP has provided detailed information on the value of all Welsh contracts which will contribute to the Welsh economic impact, we were not required to assess the full UK contractor spend, hence our analysis does not include UK based impact.

Likewise, the gross expenditure estimates provided below will be under-estimates because the value of contracts awarded to UK firms would still contribute to the gross expenditure in Newport because the contractors all undertook their work at the Celtic Manor in Newport.

The areas included within this “contractors section” include:

- Emergency Services – ambulance, fire, first aid and policing
- Infrastructure – cleaning, barriers, track ways, signage, park and ride, security, traffic management, marquees, waste disposal, telecoms, printing
- Catering & Suppliers – public and hospitality areas
- Management & Players – staging teams, players & entourage (all stayed at Celtic Manor Resort)
- Media – TV contractors were hosted in the local Wales University, Caerleon Campus with other media estimating almost 5,000 bed nights during the event.

The 2010 Ryder Cup – Economic Impact Assessment

Using data provided by Ryder Cup Europe LLP it has been possible to identify the organisational spend allocated within the catchment areas. As shown below, IFM Sports Marketing Surveys estimates that the total impacts generated by the contractors are £4.6 million for Newport and £13.8 million for Wales.

Table 51 - Summary of Contractor Spend & Impact

Impact Type	Newport	South East Wales	Wales
	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>	<i>(GBP '000s)</i>
Gross:	9,743.3	9,743.3	9,743.3
Direct:	3,035.0	6,732.5	9,112.9
Total Economic:	4,582.8	10,166.0	13,760.4

Sources: Ryder Cup Europe LLP/IFM Sports Marketing Surveys

Note: data for UK and overseas contractor spend was not supplied.

4.7. Media Expenditure

Data concerning media attendance and expenditure is often estimated via survey research. However, for The 2010 Ryder Cup EIA, the media expenditure has been included has been provided by The European Tour detailing country of residence, number of days in attendance, location of accommodation, average price per night and estimated daily off-site expenditure.

The majority of TV media were provided with room and board nearby at the University of Wales Caerleon Campus, which was contracted to provide these services. Therefore, the media expenditure is included within this sole contract. In addition data was provided for the non-TV based media on bed nights in relevant accommodation.

The online items of expenditure that the media may incur that is not included within this contract value would be food and beverage in the evenings as well as any entertainment or souvenirs. However, this would then be personal expenditure rather than corporate and likely to be of a more modest magnitude.

4.8. Expenditure by Players & Entourage

Data concerning player expenditure was provided by Ryder Cup Europe LLP, as per the contracts awarded for provision of secure accommodation and facilities for the players and their entourage. With both teams and associated entourages staying at The Celtic Manor Resort all accommodation spend is attributed to Newport.

As is the case with all contractor data, it is confidential to Ryder Cup Europe and is not being disclosed at an identifiable level within the economic impact assessment.

5. Wider Effect of Hosting The Ryder Cup

5.1. Introduction

This report has calculated the economic impact for hosting the event itself to the host economies specified. However, there are additional tangible and intangible benefits to hosting a major event such as The Ryder Cup which have not been included in this report.

Using the studies for EIA measurement as well as from other surveys and published sources these additional benefits have been evaluated with separate reports provided to the key stakeholders. The sources for this data and information includes:

- Spectator Surveys – on-site and post follow up event – undertaken by IFM Sports Marketing Surveys
- Hospitality Organiser Surveys – undertaken by IFM Sports Marketing Surveys
- Volunteer Surveys – undertaken by IFM Sports Marketing Surveys
- Local Business Surveys – undertaken by Strategic Marketing with additional interviews with local services by IFM Sports Marketing Surveys
- Wales Residents – undertaken by Beaufort Research for the project
- Local Golf Clubs – undertaken by IFM Sports Marketing Surveys
- GB Public Tracker – undertaken by Visit Wales as part of their on-going tracking
- Visit Wales Golf Tourism Tracker – undertaken by Sports Marketing Surveys Inc. on behalf of Visit Wales
- TV Media Return – undertaken by Repucom on behalf of Ryder Cup Europe LLP
- Print Media Return for Newport – undertaken by Four Communications on behalf of Newport City Council
- Occupancy for Major Hotels – sourced from STR Global
- Congestion Analysis for the M4 – undertaken by Welsh Assembly Government

Extracts from these studies are used to illustrate the additional benefits of hosting The Ryder Cup for Wales and its regions.

5.2. Impact on the Profile and Perception of Wales

The 2010 Ryder Cup welcomed almost 80,000 non-Welsh visitors in the form of spectators, hospitality guests and volunteers. In addition contractors were urged to source as much Welsh based product as possible offering the opportunity to expand their portfolio of suppliers.

At the event, 30% of spectators visited the 2010 Wales stand and received information on Wales. 57% of spectators were very satisfied with the Welsh welcome they received at the event and 81% had heard some Welsh language spoken or seen some on signage. Those spectators who chose to stay in Wales had very high satisfaction with the welcome they received (85% satisfaction) and 88% were satisfied with the quality of accommodation that they stayed in in Wales.

- The welcome received by spectators and volunteers reflected the nature of the accommodation they used – mostly local bed and breakfasts/guest houses and smaller hotels in Newport and South East Wales. The smaller serviced sector increased their occupancy levels from 69% to 78% for the duration of the event.
- Hospitality guests were more likely to stay in the higher end hotels in the Newport and Cardiff areas. Occupancy data for the Thursday to Saturday is traditionally 75-90% and this did not change, however, the Sunday average occupancy at the same time of year rose from 41% to 76%. It was also apparent from comparison of year on year revenues that these higher end hotels had increased their rates during The Ryder Cup to achieve a three- fold increase in return.

The event also gave rise to pride to local residents in hosting the event – 62% of local residents said that The Ryder Cup had directly increased the pride they had in their country and 68% felt that the event would help bring more major events to the country. It was felt that local residents would be impacted substantially by the traffic congestion during The Ryder Cup. However, indicative analysis by the Welsh Assembly Government concluded that the estimated congestion cost from the M4 in Wales for the event was likely to be relatively small – between £0.1-0.2million. Some residents, particularly in Newport, had felt some effect with 23% less likely to have gone into Newport and 27% saying that they changed their route to work/shopping or to visit friends during the event, this could have led to some displacement.

Newport was clearly recognised as the host region raising its profile, with 60% of spectators having seen signage linking the venue to Newport. Impressions of being at the event and

The 2010 Ryder Cup – Economic Impact Assessment

staying locally gave rise to almost a third of non-Newport based spectators saying that The Ryder Cup had enhanced their image of Newport as a visitor destination.

The Ryder Cup was broadcast globally and offered unique opportunities for Wales, Newport and The Celtic Manor Resort to showcase their locations. In Great Britain awareness of Wales hosting The Ryder Cup increased from 35% in March 2010 to 61% in October and retained a 50% level to the end of the year. Through TV, almost 70,000 mentions/visuals of Celtic Manor Resort, Visit Wales and Newport were made during international TV broadcasts providing US\$9.6m (£5.9m) media value. Newport itself received articles with the majority in key publications and involving interviews with key Ryder Cup personnel.

5.3. Legacy for Tourism, Golf, Sports & Events

An immediate impact from the event was that 26% of spectators and over 10% of volunteers extended their stay in Wales to incorporate tourism. In the mid to longer term, 59% of non-Welsh spectators (and 65% of non-Welsh volunteers) said that the event had made them more likely to return to Wales for a short break or holiday.

The tourism effect was also welcomed by local residents, where two thirds felt that The Ryder Cup had showcased Wales as a tourist destination and 19% of local businesses believed that the event would result in increased tourism for Wales.

Golf events have a unique place in legacy impact. Attendees at golf events, and The Ryder Cup is no exception, are most likely to play the game and want to return to play the course where they have watched the top players. Of the non-Welsh spectators at the event 61% said that they were now more likely to play golf in Wales (63% of non-Welsh volunteers also saying this). Local residents also believed that the event showcased Wales as a golf destination (77%).

There was some immediate return for the local courses with 22% of courses in the surrounding area seeing an increase in local enquiries to take up or return to golf as well as increased revenues from attendees extending their stay through green fee revenue.

The Visit Wales Golf Tourism Monitor in 2010 reported *that "The Economic Impact of golf tourism to Wales in 2010 was £41.9million, up 21% from 2009 (£34.7m) and 82% from when we started the Monitor in 2004 (£23.0m); this 2010 figure includes expenditure of golf tourists*

The 2010 Ryder Cup – Economic Impact Assessment

who came to watch The 2010 Ryder Cup. In total over the seven years that the Monitor has been run there has been a cumulative expenditure of £203,300,000 and 1,154,000 golf visits.”

Attitudes towards golf in general were also very positive. 95% of spectators were current or lapsed golfers but 43% said that The Ryder Cup had made them more likely to take up or play more. It also expanded to increase the numbers playing with 41% stating that they would encourage family to play take up or play golf. Volunteers were no exception with 28% inspired to take part in more sport due to their involvement with the event.

The experience of attending the event as a spectator also inspired 60% of spectators to attend more sporting events generally.

The volunteers who helped out at the event also saw benefits with 39% saying that the event had contributed to their personal development, 32% felt part of a wider community and 28% said that it had helped their self-confidence and self-esteem. It had also increased their commitment to be a volunteer at future events – 77% wanting to help at the next Ryder Cup, 60% at other sports events and 36% at non-sports events.

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