



# Sports ETA

SPORTS EVENTS & TOURISM ASSOCIATION

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## 2019 STATE ASSOCIATION

### *Research Study*

*Study designed and led  
by Jennifer Stoll, PhD*

## PURPOSE

1. Gain a better understanding of state associations and distribute information to better resource Sports ETA members.
2. Distill information related to state associations for enhanced member resourcing, development of Sports ETA sub-group, and increased value proposition.

## RESEARCH QUESTIONS

- 1 | How are state associations structured? ..... 1-2
- 2 | How is your organization funded?  
What is your organization's annual budget? ..... 3-4
- 3 | What are the desired outcomes of state associations? ..... 5
- 4 | What processes do state associations implement to  
achieve these outcomes..... 6
- 5 | What are the internal functions of state associations? ..... 7-8
- 6 | What are the external functions of state associations? ..... 9
- 7 | Who/What are the organization's key stakeholders? ..... 10
- 8 | What do state associations perceive to be their organizations'  
biggest successes and challenges? ..... 11-12

**TOP 6 ANALYSIS TRENDS** ..... 13-15

**DESIRED FUTURE RESOURCING** ..... 16

**Study Method** - Qualitative Interview

**Interview Participants** - 25

**Avg. Interview Length** - 37 min

### Years Of Operation

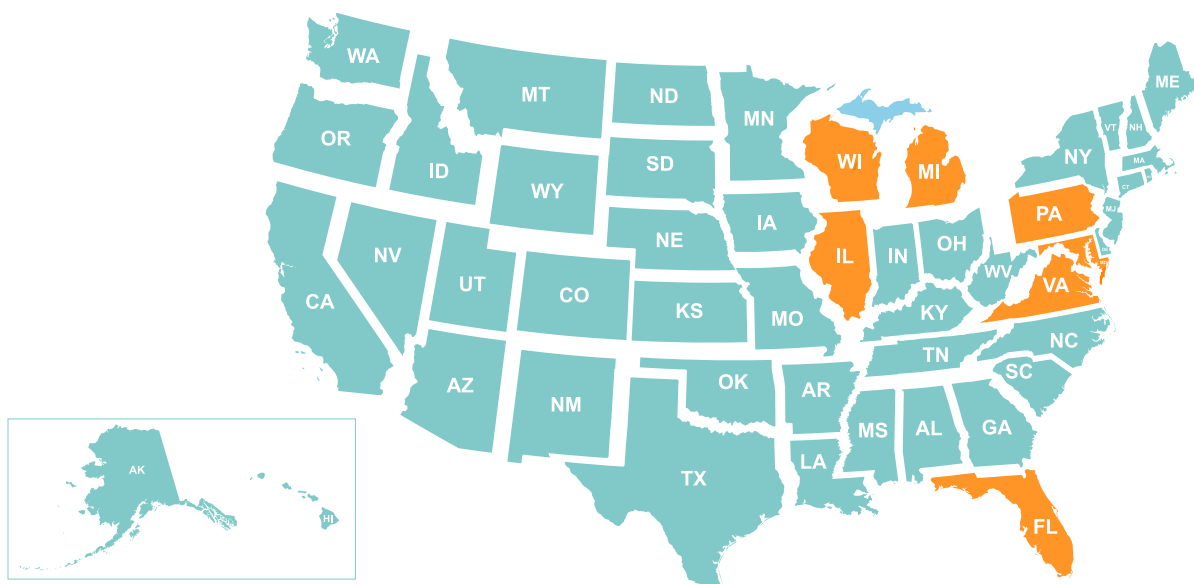
- Majority of organizations (64%) have been in place between 5-15 years (overall avg. was 10.5)
- Three have operated less than 5 years and another two are in the formation process.

# How are state associations structured?

## ORGANIZATIONAL STRUCTURE

- Ten state organizations (40%) operate as non-profits, three others are working towards, or exploring the possibility of gaining non-profit status.
- **Notable Public-Private Partnerships**
  - **Florida Sports Foundation:** Although an independent non-profit, the FSF operates under Enterprise Florida's Sports Development Division. Enterprise Florida is the official Economic Development Organization for the State of Florida.
  - **PA Sports:** They receive \$100,000/year from the state of Pennsylvania budget.
  - **Pure Michigan Sports:** Agreement between the state (Michigan Economic Development Corporation) and the Greater Lansing Sports Authority to operate Pure Michigan Sports and manage the state-owned portion of funding.
  - **Sports Illinois:** Sports Illinois is a niche committee between the Illinois Council of CVBs and the Illinois Dept. of Tourism. The State of Illinois funds 39 CVBs who are certified through the ICCVB.
  - **Sports Virginia:** A consumer marketing program administered by the Virginia Tourism Corporation (a quasi-state agency/state marketing organization).
  - **Sports Wisconsin:** A "three-legged stool" under the Wisconsin Dept. of Tourism, Wisconsin Association of CVBs, and local CVBs. Sports Wisconsin is a committee under WACVB but is primarily funded by the state.
  - **TEAM Maryland:** Essentially a quasi-government agency of the state. The Maryland Sports Commission runs TEAM Maryland from a management/operations perspective. Partners pay to be a part of TEAM Maryland and the state matches (close to dollar-for-dollar).

Ten state organizations **operate as non-profits**, three others are working toward the possibility of gaining non-profit status.



## GOVERNANCE

- Nine state organizations have established bylaws and utilize a board of directors while nine do not utilize either one.
- Three states have board of directors (no bylaws), two have bylaws (no BOD).

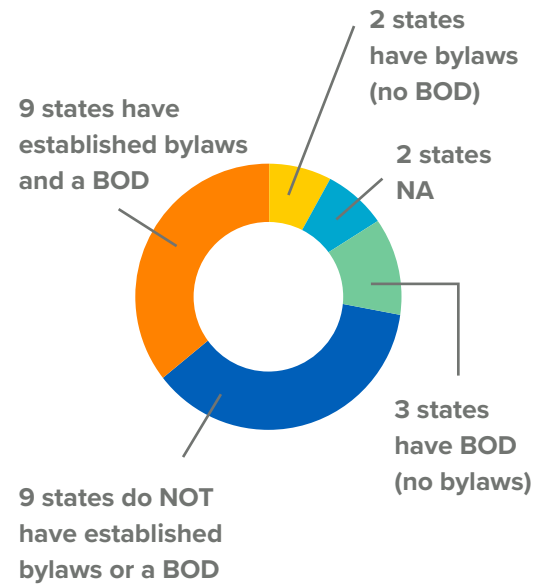
## STAFFING STRUCTURE

- Majority of organizations (60%) do not have a paid staff member (full or part-time).
- Other staff arrangements include: full-time administrative assistant, part-time administrative secretary, 1-2 representatives within a state's Department of Tourism, etc.
- **Notable:**
  - The Florida Sports Foundation currently has 11 full-time staff (with two additional positions posted) in addition to employing interns.

## TITLE OF TOP EXECUTIVE

- President is the most common title (8 organizations), followed by chair/chairman (5).
- Other titles include: coordinator, director, executive director, and partner.
- Four states do not have a designated top executive.

## STATE ASSOCIATION GOVERNANCE



Majority of organizations (60%) **do not have a paid staff member** (full or part-time).



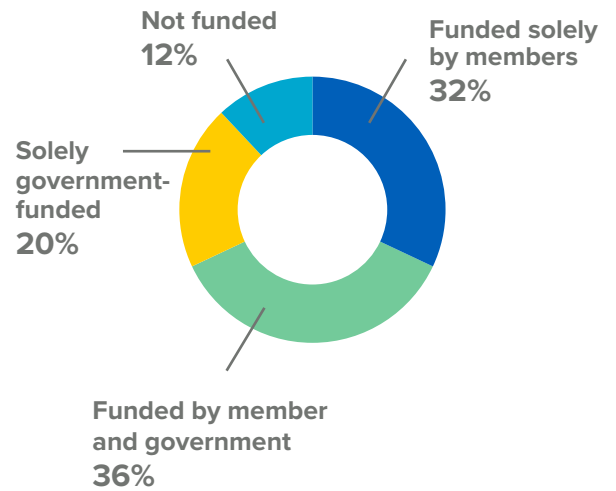
# 2

## How is your organization funded? What is your organization's annual budget?

### ORGANIZATIONAL FUNDING

- Eight state organizations (32%) are funded solely by members.
- Nine state organizations (36%) are combination (member and government).
- Five states (20%) are solely government-funded and another three (12%) are not funded at this time.

### STATE ASSOCIATION FUNDING



### ANNUAL OPERATING BUDGETS

Sports Alabama	AL	—
Florida Sports Foundation	FL	\$6,100,000
Georgia Sports	GA	\$50,000
Team Iowa	IA	\$50,000
Sports Illinois	IL	—
Sports Indiana	IN	\$20,000
Sports Kansas	KS	—
Team Kentucky	KY	\$60,000
Louisiana Assoc. of CVBs	LA	\$12,000 - \$15,000
TEAM Maryland	MD	\$80,000 - \$150,000
Maine Sports Commission	ME	\$130,000
Pure Michigan	MI	\$130,000
Minnesota Sports	MN	—
Show Me Missouri Sports	MO	\$60,000
SportsNC	NC	\$110,500
Sports Nebraska	NE	\$17,000
NY State DED	NY	—
Ohio	OH	—
Oregon Sports Authority	OR	—
PA Sports	PA	\$180,000
South Carolina Sports Alliance	SC	\$57,000
Play Tennessee	TN	—
Texas	TX	—
Virginia Tourism Authority	VA	\$75,000
Sports Wisconsin	WI	—

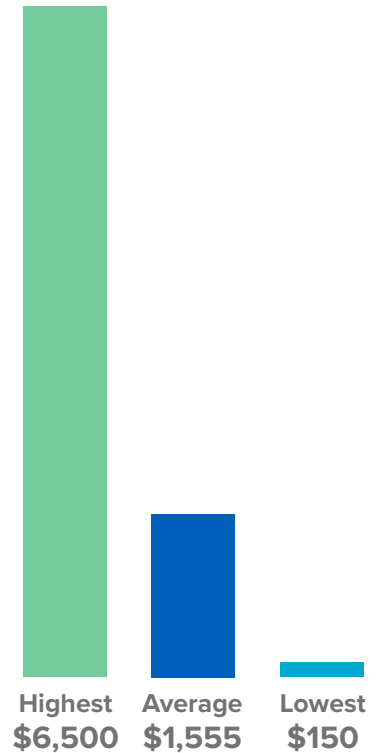


## ANNUAL MEMBER DUES

- Average across all member-funded organizations was \$1,555.
- Highest was \$6,500, lowest was \$150.
- Several variations of tiered memberships exist.
- Multiple states (4) offer full/half memberships.

o **Notable:**

- **Tennessee:** Membership tiers based on total budget
  - Above \$1M: \$2,000
  - \$750k-\$1M: \$1,500
  - \$500k-\$750k: \$1,250
  - \$250k-\$500k: \$1,000
  - \$100k-\$250k: \$750
  - Under \$100k: \$500
  - Affiliate member (tourism-related): \$500
- **North Carolina:** Tiered by type (primary/secondary is used if there are two members in the same location).
  - CVBs/Sports Commissions (\$1,000 primary, \$500 secondary)
  - Universities/Facilities (\$750 primary, \$500 secondary)
  - Parks & Rec (\$500 primary, \$500 secondary)
- **Maryland:** Has a base due of \$3,500 and then allows members to purchase additional items “a la carte” that can raise the cost up to \$9,500.
- **Pennsylvania:** New members pay a \$15,000 initiation fee over the first two years (in addition to regular membership dues).



Annual Member Dues

## BENEFITS OF MEMBERSHIP\*

- Enhanced exposure at national conferences/trade shows was the top response (63%), followed by website/social media presence (56%), assistance (full or partial) for trade show fees (50%), advertising/promotional materials (50%), and shared leads (38%).
- Other benefits mentioned include: organizational meetings, voting rights, participation in sales missions, in-state events, Sports ETA membership, access to support letters for bids, ability to apply for grants, and access to a lobbyist.

*\*Only includes the 16 organizations with membership component.*

**Enhanced exposure at national conferences/trade shows** was the top response (63%) to the benefits of membership

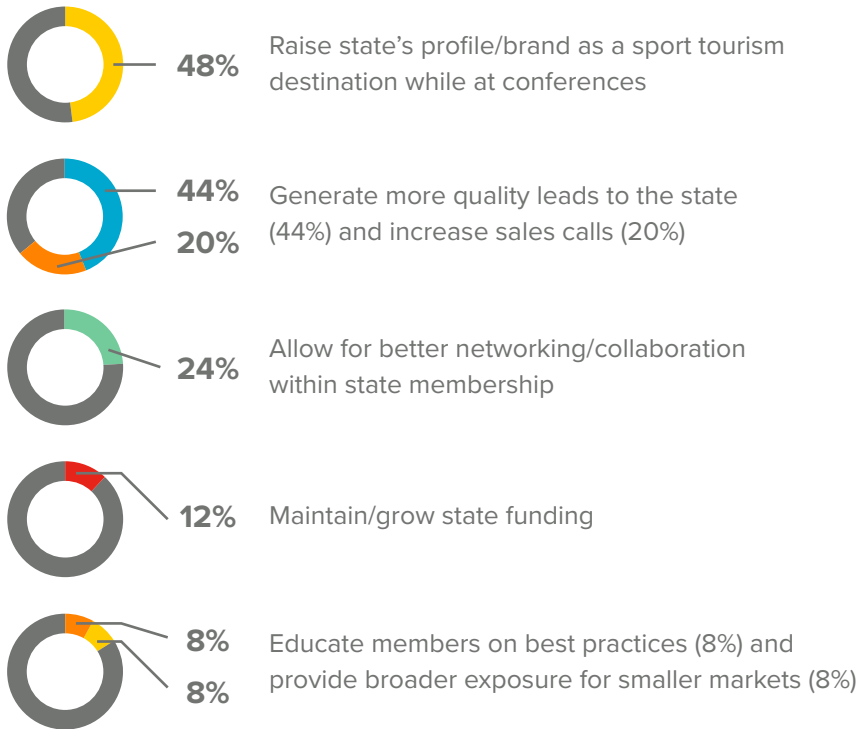


# 3

## What are the desired outcomes of state associations?

### DESIRED OUTCOMES

- In addition to the obvious (bring sports business to the state and increase economic impact), the top responses were:



### Top 2 state association desired outcomes:

- 1) Bring sports business to the state
- 2) Increase economic impact



# 4

## What processes do state associations implement to achieve these outcomes?

### MEASURING SUCCESS

- The most common (44%) measurement of success was standard reports (economic impact, bids received, business booked from appointments at shows, leads generated, website visits/social media hits, number of events hosted in-state, etc.). Approximately half of the state organizations surveyed mentioned this type of measurement and multiple organizations referenced the fact that they submitted reports to their respective state leaders.
- Brand recall at trade shows and increased awareness of destinations within the state was also a common theme.
- Several states specifically mentioned “listening to the members” and even going as far as to distribute a member questionnaire (Alabama) to ensure that members felt they were getting a good ROI by being a part of the organization.
- Two states stressed that keeping members involved (and membership numbers up) was a measurement of success.
- Five states did not have any defined form of measurement.

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# 5

## What are the internal functions of state associations?

### INTERNAL PROCESSES

- Majority of organizations meet as a group (number of times per year varies). A central theme was communication and feedback within the membership as a whole. This often included a focus on sharing leads and comparing industry notes with peers within the organization (friendly competitors). Multiple leaders mentioned “working together to promote the entire state,” not just individual destinations (in-state event is better than no event).

- o **Notable ideas:**

- North Carolina has implemented an “Instagram Takeover,” where member destinations run the organization’s account for a week (promoting their location, trying to focus on weeks when they host major events) and then rotate.
- Minnesota and South Carolina want their members to serve on committees to maximize organizational involvement.
- Alabama attends all state meetings in order to update government leaders on what the organization is doing.

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Multiple leaders mentioned “**working together to promote the entire state,**” not just individual destinations (in-state event is better than no event).

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### GRANT PROGRAM/CO-OP/PR CAMPAIGN

- 68% of state organizations do not have grants, 48% did not mention participation in co-ops, and 60% did not identify a PR campaign.

- o **Grants**

- Organization-based grants: Maryland is the only one
  - **Youth and Amateur Sports Grant Program** (2nd year)
    - o Pool of \$350,000 to help get events new to the marketplace off the ground operationally.
    - Other grants are available for marketing efforts.
- Notable State-based (government) grants:
  - **Florida Sports Foundation’s Specialty License Plates**
    - o The state offers 12 specialty license plates bearing the logos of professional sports teams within the state. A portion of each tag fee is given out in grants by the Florida Sports Foundation to support sporting events across the state and other sports development opportunities. This has become one of the most successful sports-based public-private partnership programs in the nation.
  - **Minnesota**
    - o State bid fee grant program. Set up in a 1/3 match format, up to \$25,000 (Explore MN would reimburse member) to win a bid for an event. State funding for this program used to be \$800,000, but recently cut the amount to \$60,000.
    - o There is also an event operations grant. If you won a bid, the grant would help run the event. Award could be up to \$200,000 (1/3 match format applies).

- **Indiana**

- o Grant program (biennial state funding) that is a reimbursement program.
- o Grant committee (7 members) meets once a month to review applications (which can be submitted on a rolling basis).
- o State funding of \$100,000/year has been pretty constant. Max member request can be \$20,000 (average is \$7,500-\$10,000).
- o Awareness of grant program has gone up in recent years and has become a popular program for members.
- o Do receive a marketing grant from the state (up to \$50,000), but it has not been consistent.

- o **Co-ops**

- The most common co-op mentioned (6 states) was publication-based (typically a partnership with members to produce a state edition of the Sports Planning Guide).
- Trade show partnerships was the preferred type of co-op for two states.

- o **PR Campaigns**

- Only eight states mentioned PR campaigns, with the vast majority being internal efforts (website creation or re-design, publications, etc.) Two states employed outside PR firms.

## WORKING WITH MEMBERS

- Most common methods were meetings (48%), which ranged from one annual meeting/retreat to quarterly meetings. Seven states (28%) referenced the fact that their membership held at least one meeting per year at trade shows/conferences (formal and informal).

- o **Notable:**

- Meeting Location Rotation
  - Several states meet multiple times per year and utilize various destinations around their state. These meetings are also essentially site visits where new and/or existing venues can be toured. In this words of Georgia, this “makes it easier for members to cross-promote each other.”
- Quarterly Newsletter
  - Minnesota members receive a quarterly newsletter that showcases new venues and discusses ideas that might add value to destinations within the state.
- Recruiting Prospective Members
  - Kansas makes an effort to work with smaller communities/CVBs who are looking to get started and try to be a useful resource for them.
  - Kentucky meets with prospective new members at their state’s tourism conference.

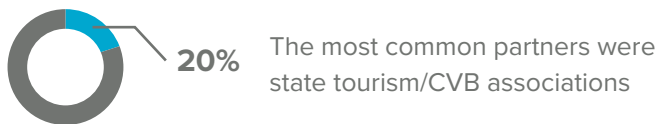
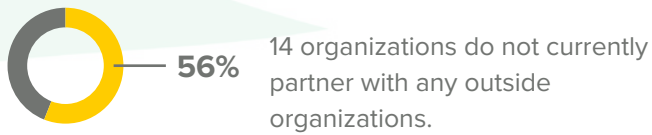
- 32% of organizations mentioned that conference calls were utilized on a regular basis in addition to group emails and sharing information through programs such as google docs.
- Three states shared that they sought to increase member engagement by creating and collaborating with committee groups.



# 6

## What are the external functions of state associations?

### PARTNER ORGANIZATIONS



- Other partner organizations included state tourism departments/economic development corporations, trade shows, Huddle Up Group, and chambers/city officials.

#### o Notable Partnerships:

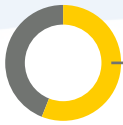
- The Florida Sports Foundation’s board members are associated with MLB, NHL, NBA, NFL, MLS, NASCAR, USOC, NCAA, Disney, Sony (PGA event), Orange Bowl, and the fishing industry. The FSF’s bylaws state that nobody on the BOD can be tied to a CVB, so this opens the door for close partnerships with outside organizations. The FSF also has a great relationship with MLB since spring training (Grapefruit League) is hosted within the state.
- Maryland partners with “Maryland’s Own,” which are event rights holders located within the state. They want them to host events in Maryland before going anywhere else.
- Indiana partners with the NCAA to host educational sessions since the NCAA is headquartered in Indianapolis.



# 7

## Who/What are the organization's key stakeholders?

### KEY STAKEHOLDERS



56% Members (Destinations)



28% State's Tourism Department



24% Directors of CVBs/DMOs



12% State CVB Associations

- Members (destinations) was the most frequent answer (56%), but 24% mentioned directors of CVBs/DMOs. Overall, 80% of organizations referenced this group of stakeholders.
- Seven organizations (28%) felt that their state's tourism department was a key stakeholder in their efforts, followed by state CVB associations (12%).
- Other answers included major arenas/facilities, state governor's office/legislature, high school athletic association, trade shows, Maryland's Own, and the NCAA.

Overall, 80% of organizations referenced **members (destinations) and directors of CVBs/DMOs** as key stakeholders.



# 8

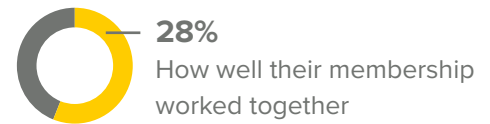
## What do state associations perceive to be their organizations' biggest successes and challenges?

### BIGGEST SUCCESSES

- Keeping with an ongoing trend within this study, the most frequent success (28%) mentioned was how well their membership worked together and collaborated for the good of the state.
- Brand awareness/sponsor recall (24%) was a frequent response, followed by bringing major/signature events to their respective state (20%).
- Four states specifically referenced the fact that their membership base had remained stable or increased in recent years, which signified continuity as an organization.
- Other states took pride in creating their own in-state events, hosting trade shows/symposiums, developing/growing a grant program, seeing ROI from NGB sales missions, hosting NCAA championships, retaining/growing state funding, and simply building a good industry reputation as an organization.

o **Notable:**

- In addition to their highly successful specialty license plate program, Florida's games (Senior and Sunshine State) combine to create the longest-running Olympic-style festival in the nation. Thousands of competitors participate each year, including many non-residents.

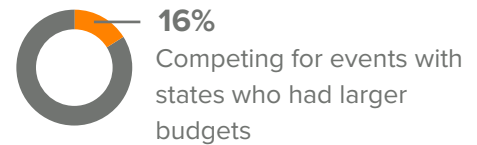
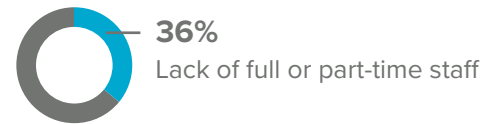
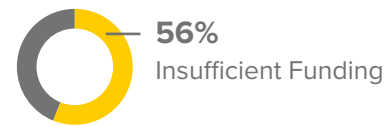


Florida's games (Senior and Sunshine State) combine to create the **longest-running Olympic-style festival in the nation.**



## BIGGEST CHALLENGES

- Not surprisingly, organizations mentioned that insufficient funding (56%) and the lack of full or part-time staff dedicated to running the organization (36%).
- Four states (16%) voiced concerns about competing for events with states who had larger budgets.
- Being tied to state government has some negative effects as multiple states referenced consistency within the government (leadership changes) and how it affected their organization. One state also expressed concern about the scrutiny that comes with being affiliated with the state government.
- Recognition within the state (including recognition from the state tourism office) was also a challenge identified by four states.
- Other organizations noted the struggle to keep both large and small destinations happy and how this tied to overall membership retention/growth. Industry turnover was also an issue for two states since destination leaders or BOD members changed positions fairly often.
- This study seeks to address what two states saw as an ongoing issue: nowhere to turn in order to learn the best practices of other states (model for those seeking to build/grow a state association).



## LEADER IN STATE SPORTS MOVEMENT

- 17 organizations (68%) strongly feel that they are leaders within the sports movement in their respective states. Others are unsure at this point given the fact that they are either (a) just starting to form an organization, (b) reside in a state with multiple sport-related organizations, or (c) lack sufficient recognition to be a driving force at this time.
- 28% of respondents noted that their organization was the only group in the state that focused solely on sports tourism, while three others mentioned that the best sport marketing experts in the state were included in their membership. Three states also said that their state support has gone up because government leaders constantly see/understand what they are doing.





## Top 6 Analysis Trends

*Throughout the 25 interviews, these are the broad trends that emerged most frequently and notably.*

### 1. Cohesive Membership/ High Tide Raises All Boats

- The overwhelming theme in this study is the fact that so many successful state associations repeatedly reference how their membership works together to accomplish goals and collectively bring business to the state.
- Lead sharing was specifically mentioned by the majority of respondents and it was clear that most associations operate with the mindset that all members are “friendly competitors” who are also “on the same team.” They stress the idea that bringing business to the state is the top priority, even if that means helping an in-state peer land an event. Cross-promotion and potentially rotating events has helped several states gain more exposure in the industry. In the words of one interviewee, “we partner together to support each other because we can accomplish so much more as a team than as individuals.”
- Another respondent noted that our association “is like a family and we hear this from our clients.” It was clear throughout the course of this study that collaboration, extensive communication, strong relationships, co-op advertising, booth-sharing, and celebrating the success of peers within the state association was a recipe for sustained industry success.
- It was also nice to see states who make a concerted effort to include all destinations/DMOs/CVBs within their state, no matter their size or budget. One person mentioned a scholarship program for smaller communities, others make sure that smaller cities can travel to trade shows even if they can’t afford it, while others strive to be a resource for destinations wanting to enter the sport tourism industry.
- Finally, several association leaders mentioned the fact that their organization is constantly assessing member ROI in order to ensure that the group is providing value to individual members and helping them be successful at the local level.

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Successful state associations repeatedly reference how **their membership works together to accomplish goals** and collectively bring business to the state.

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## 2. State Support

- 19 of the 25 states (76%) who participated in this study referenced state assistance in some form (directly tied to government agency, received direct funding, received sponsorship dollars, had access to grants, etc.). It is clear that state recognition is vital to the long-term success of state sports tourism associations.
- Although government funding may not always be the most consistent, it does allow states to provide more benefits for their members and keep membership dues low (if the association is a membership organization). State partnerships can also lead to the creation of lucrative programs (ex. Florida Sports Foundation's specialty license plates), provide access to bid letters from government leaders, lead to a permanent line item in the state budget, and increase exposure across the state. When it comes to hosting major events, support from the state government is usually required.
- However, in order to gain the attention of state leaders, state associations have to prove their value. This means that there is a need for state-based economic reports, a large unified presence across the state, lobbying efforts (if possible), and a good reputation within the industry. Also, Florida stresses the importance of being responsible with state appropriations (they consistently receive extremely high marks from the Office of Program Policy Analysis and Government Accountability (OPPAGA) which demonstrates their sound use of government funding).

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**State recognition is vital to the long-term success of state sports tourism associations.**

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## 3. Venturing in uncharted territory

- Important to bear in mind that average length of organizational history is merely 10.5 years, in an industry whose association is only 26 years.
- Much like sport tourism entities in general, there is no one model for structure, funding or otherwise that can fit all state association organizations.
- Rather than suggesting a preferred way to organize, this study instead aims at informing the breadth of ways other states have tackled establishing a state association thus providing a variety of structures, which likely are not all-inclusive.
- Continuing to monitor and evaluate state association trends in the future is necessary to analyze longitudinally and possibly establish what structures and formats are working best.
- This data lends itself to establishing a platform for communication among state association representatives facilitated through Sports ETA (see trend 6)

## 4. Desire for increased resourcing

- Because most (if not all) of these organizations are still in relative infancy, establishing means for successful business (repeatable and sustainable) is paramount.
- State associations are hungry to acquire additional resources including human and financial capital.
- They are balancing the acquisition of resources with their – often times – already pressed budgets and staff capacities of the organizations that make up their membership.
- Significant disparity comes into play between state associations that receive funding from the state-level government and those that do not (see trend 2).
- This resource disparity underscores the need for continued communication relevancy of state associations among state tourism officials and presents an opportunity for Sports ETA to serve in an advocacy capacity in support of these efforts.



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## 5. Increasing partnerships (collaborators vs. stakeholders)

- More than half of state associations do not partner with other organizations.
- There is a significant opportunity to increase both collaborative and stakeholder partnerships to advance the cause of state associations.
- Collaborators include outside organizations the state association works with, such as venue operators, state entities (if not state affiliated), etc.
- Stakeholders include increasing the breadth of members or affiliates who have a vested interest in the activities of the state association. These could be venues, districts, corporate partners, etc.
- Partnerships also presents an opportunity to divvy up workload and lean on the expertise of other organizations, particularly since staff capacity was a common issue.
- State associations could use additional information about how to develop partnerships for state initiatives and where to find potential partners.

## 6. Desire for expanded Sports ETA resourcing

- All the trends and the comments from the interviews point to the fact that state associations are craving additional resourcing and Sports ETA is primed to answer that call.
- These indications point to the need for a sub-association focused on the EARN pillars (education, advocacy, research, and networking) of Sports ETA to this specific audience.

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There is a significant **opportunity to increase both collaborative and stakeholder partnerships** to advance the cause of state associations.

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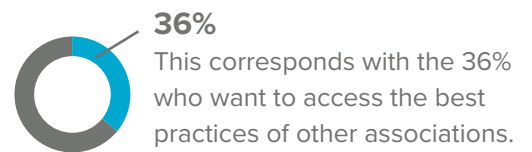
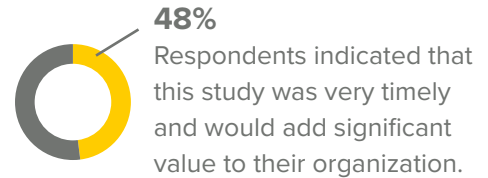


## Desired Future Resourcing

- 48% of respondents indicated that this study was very timely and would add significant value to their organization. This corresponds with the 36% who want to access the best practices of other associations across the nation in order to improve their own organization or help launch a new association.
- Approximately half (48%) of state organizations appreciate the fact that Sports ETA provides state association leaders the opportunity to meet as a group and discuss ideas. They would like for Sports ETA to continue and ideally expand this endeavor.
- Remaining a hub of information (trends, issues, white papers, etc.) as well as an educational asset (certifications, summits, webinars, etc.) is seen as a priority by nine states (36%).
- Finally, four states would like to see more state-based tools becoming available (ex. a statewide ROI formula). Right now, the tools such as the economic calculator only help at the destination/event level.

o **Notable:**

- One respondent expressed a need for leadership training for new organization leaders (leaders of start-up organizations or leaders who have assumed an executive role within an established association).
- Another person would like to see Sports ETA become a centralized point for bids so that finding events would be a streamlined process.



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Four states **would like to see more state-based tools** becoming available (ex. a statewide ROI formula).

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*For questions or comments about this study,  
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