

“CAN UK SPORTING VENUES USE MARKET SEGMENTATION TO IMPROVE THEIR EFFECTIVENESS AT TARGETING THE CONFERENCE MARKET?”

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ABSTRACT

The following piece of research investigates the use of UK sporting venues for conference activity, and asks whether UK sporting venues can use market segmentation to improve their effectiveness at targeting the conference market. Determining factors in conference site selection of UK sporting venues including the uniqueness, heritage and location of the venue are discussed in great detail. Methodology used includes the examination of three UK sporting venue case studies, and the distribution of questionnaires to both conference staff at UK sporting venues, and to freelance, association and corporate UK conference planners. Results illustrate how some UK sporting venues already employ in-depth market segmentation techniques to identify and target audiences. Content is also offered on considerations for improvements in usage of market segmentation techniques by sporting venues, and the identification of industry trends.

Key Words: market segmentation, sporting venues, uniqueness, heritage.

INTRODUCTION

The ensuing research derived from a combination of the author's own interests in both conference site selection and secondary commercial activities at UK sporting venues, together with limited published research in the given field. The key research rationale included initially investigating existing observations on conference activity at sporting venues, and to supplement this with primary research from both nationwide conference planners, and a selection of UK sporting venues with active conference departments. Increasing coverage of this topic over recent years in industry publications is heightening overall awareness of sporting venues to conference and event planners, and it is forecasted that this trend will continue in months and years to come. Therefore, the potential for growth of such venues is strong.

The Demand for Conference Venues

The national and international conference industry requires the provision of venues in which to hold meetings. Venues offer much more than just meeting space, however, with high levels of customer service and catering sufficient to influence the decision-making of conference planners. McCabe et al. (2000, p.50) specify how: “venues that wish to develop a share of the MICE industry need to provide purpose-built facilities that offer multiple usage, are flexible in their design and have suitable lighting and breakout space.”. Rogers (2003, p.142) stresses that conferences: “should live long in the memories of delegates, not only because of the benefits accruing from what has been shared and learned during the formal programme, but also for the opportunities

they provide for informal networking and doing business, as well as socializing.”. Many authors including McCabe et al. (2000), Buxton (2006, cited in Redford, 2006), and Colston (2006b) agree with Kavanagh (2006, cited in Wills, 2006) in stressing the importance of the overall conference experience: “In order to make any event a success, you need to offer a memorable experience for your clients and guests.”.

Furthermore, the appropriate choice of venue contributes towards the success of the conference, re-enforcing the conference theme or image of the company. Here, Campbell et al. (2003, p.49) emphasize that: “The location of your event can affect – either beneficially or adversely – the number of participants who attend, the extent and nature of the input within the conference, and the overall feel of the event.”.

The Supply of Conference Venues

In competition to the more traditional use of hotels and conference centres, the past decade has seen the emergence of many ‘unusual’ conference venues. Salem (2007, p.49) agrees with Seekings (1999, p.52) in defining unusual conference venues as: “Zoos, aquariums, business centers, mansions, museums, dude ranches, cruise ships, movie theatres, college and university campuses, stadiums, arenas and dining and entertainment venues all provide extraordinary meeting options.”. The strong performance of conference activity at unusual venues is noted by Colston (2007a, p.36): “The MIA Conference Survey 2006 indicated that £500 million was spent annually on non-residential meetings in unusual venues. It also showed that these venues continue to gain market share with corporate organisers, with 26 per cent preferring them.”.

Salem (2007, p.48) further highlights that the move towards the use of unusual venues isn’t just limited to conference activity in the UK: “According to MPI’s *FutureWatch* 2006, an average of 22 percent of North American meeting planners are turning to non-hotel and non-convention center meeting venues to make their events distinctive, engaging and different.”. The same author proceeds to state that notably: “The latest statistics from the Unique Venues database indicates that there are more than 14,000 facilities in North America that offer venues for external meetings and events.” (Salem, 2007, p.49). Rogers (2003, p.48) and Cole (2009) both highlight one of the main pull factors for such venues: “The attraction of unusual venues is they can give an event a special appeal and can make it memorable for years afterwards”.

It is with focus on creating such a memorable delegate experience that sporting venues have capitalised on increasing interest within the events industry. In comparison, many event planners are demanding more from their chosen venue, and the once previously ‘automatic’ choice of a traditional conference hotel or purpose-built conference centre is now replaced with a multitude of potential venues, all able to create that experience to be remembered. This theme is a key consideration throughout the research, and one which is discussed further during interviews with sporting venue events staff.

The Marketing of UK Conference Venues

In addition to collaborating with their destination, a venue may choose to become a member of a marketing consortia or organisation, bringing venues with similar interests and facilities together. Examples of such organisations include *Venuemasters*, established in 2001 for UK academic venues, and *Stadium Experience*, a marketing

consortium established in 2002 for UK football clubs offering conference facilities. Such organisations provide venues with increased market awareness, networking opportunities, and value for money by contributing to joint nationwide marketing activities.

Furthermore, a common marketing tool employed by a conference venue is the use of a venue website. The implementation of a venue website allows detailed information to be made available on both the venue and its conference facilities, together with appropriate photographs and room layouts, providing the conference planner with all key details at their fingertips.

The Role of Market Segmentation

Market segmentation developed as a marketing tool during the 1980s (Fifield, 1998, p.129) and has since been used as a key part of marketing strategy for many organisations. Woodruffe (1995, p.234) offers the explanation that: “The idea behind segmentation is to divide a market into subsets of consumers who share some similar characteristics, thus enabling the organisation to target these subsets, or segments, with a tailored marketing mix.”. McDonald & Dunbar (1998, p.15) further define market segmentation as: “the process of splitting customers, or potential customers, within a market into different groups, or segments, within which customers have the same, or similar requirements satisfied by a distinct marketing mix.”.

Agreeing with the overall importance of market segmentation, many authors including Palmer (1998) and Adcock et al. (2001) follow Kotler & Armstrong (2006, p.47) in identifying how smaller market segments: “can be reached more efficiently and effectively with products and services that match their unique needs.”. When considering the conference industry as a whole, many opportunities exist for market segmentation. These include reviewing the market through corporate or association conference planners, client relationships on a local, national or international level, in addition to the function of the client’s activities, i.e. whether they operate in the medical, financial, insurance or manufacturing sectors of industry. Each segmentation method allows the industry to be divided into more manageable sectors, each providing benefits of contacting clients of a similar nature. Furthermore, both Fifield (1998) and Drummond & Ensor (2005, p.87) describe how clients may also be segmented based on the benefits of the service received: “Benefit segmentation uses the underlying reasons why an individual purchases a particular product or service, rather than trying to identify an individual’s particular personal attributes.”.

The Demand For UK Sporting Venues In The Conference Market

“With sprawling new stadia such as Wembley and the revamped Twickenham, or traditional venues such as Sandown Park or Epsom Racecourse – or even the old charm of Fulham FC’s Craven Cottage – visitors will be getting a taste of something fantastic, which is why sporting venues are such an alluring proposition for event organisers.” (Quinton, 2010, p.40).

The rapid recent development in the supply of sporting venues for the conference market has seen much investment in conference facilities. This investment has resulted in sporting venues becoming more competitive within the conference industry. Examples of such developments in the past twelve months alone include the launch of a

£29m leisure resort at Lingfield Park racecourse with a 116 room hotel and 4 conference suites, the new Aviva Stadium in Dublin which is to host the 2011 UEFA Europa League Final, a £3m expansion of the Ricoh Arena in Coventry with 3 new exhibition halls and a 650-seat indoor auditorium, and a £32m redevelopment of Edgbaston Cricket Ground including a 1,000 seater conference marquee.

Here, Fletcher (2002) agrees with Levy (2001) in noting how: “Massive investment in UK sports venues over the past five years, coupled with a new service-driven approach, has seen the country’s football stadiums, golf courses and racetracks become a hub for hospitality and event business.”. Industry literature has also highlighted how the atmosphere created at sporting venues creates a competitive advantage in the market. This theme has been noted by many authors including Derrick (2002), Buxton (2006, cited in Redford, 2006), and Bushby (2006, cited in Siegle, 2006) who states that: “When you’re at a sporting venue there is a real sense of atmosphere that you simply can’t get from a meeting in a hotel function room.”.

Such developments have attracted many large-scale conferences and events to sporting venues during this period, further highlighting their appeal to the market. These include Lord’s Cricket Ground hosting the 2008 Travel Agents Association of India Congress for 1,000 delegates, Ascot Racecourse co-ordinating the CompTIA EMEA Member Conference for 500 delegates, and the Emirates Stadium (home of Arsenal Football Club) famously hosting the 2008 Anglo-French Summit with Gordon Brown and Nicolas Sarkozy, along with the 2008 and 2009 X Factor auditions covered on national television. A further accolade enhanced the popularity of the Emirates Stadium when it was awarded Business Venue of the Year by Visit London in 2008. For the Football Club itself, the opportunity to host such events is distinctly attractive, as Quainton (2010, p.39) identifies: “As an example, Arsenal has around 28 match days each season, leaving almost 340 days available for events – a huge potential revenue stream for the club.”

There is little doubt that the increasing coverage of the use of sporting venues for conferences and events certainly boosts their overall appeal in the market. Responding to greater interest from planners and organisers, trade press, industry websites, and even academic journals now frequently feature copy on the attractiveness of these venues. In previous years, this was not the case. Early articles began appearing towards the very end of the 1990s and once the new millennium had been welcomed, and perhaps not unconnected with the erection and commercial use of the Millennium Stadium in Cardiff from June 1999, sporting venues started to make their presence felt. As the research will indicate, concentration on specific venue improvements in levels of customer service, catering, and appropriate technology greatly enhanced their overall appeal. The paper will now proceed to discussing research methodology and give content on how research data was compiled.

METHODOLOGY

After considering other forms of research, the author proceeded with semi-structured interviews with a selected number of sporting venue staff, and an emailed questionnaire to larger numbers of conference planners and UK sporting venue staff. Semi-structured interviews enabled discussions to be focused on several key themes, but without limiting additional information on other areas if conversations proceeded in such directions. It was also felt that the use of interviews would generate large amounts of data for subsequent analysis. Questionnaires were chosen as the research tool for other sporting venue conference staff and conference planners, due to their particular suitability for these groups.

The research case studies of Arsenal Football Club, The Belfry Hotel and Country Club, and Pegasus Venues (nationwide UK racecourses) were selected primarily due to prior contact with these sporting venues by the author. Communication with each venue was made by telephone to confirm participation in the research, with each agreeing to take part. One in-depth interview took place in person at each venue in order to obtain the research data, and these were conducted with an Events Manager (Arsenal FC), Business Development Manager (Belfry Hotel and Country Club), and Sales and Marketing Manager (Pegasus Venues). The author ensured that certain specific themes including the perception of venue catering, technology, affordability, accessibility, and the increasing industry role of sporting venues were covered during the interview, if not raised in discussions.

Recipients for sporting venue and conference planner questionnaires were collated from a combination of prior industry contacts, and further internet research. Consideration was given to an equal balance of freelance, association and corporate conference planners, with a wide variety of nationwide sporting venues added from the author's own knowledge.

DATA RESULTS AND ANALYSIS

Findings of Semi-Structured Interviews with Sporting Venue Case Studies

The Use of Market Segmentation at UK Sporting Venues and Selecting Target Audiences

Discussions at the three case study venues indicated both the awareness and importance of the use of market segmentation techniques. These techniques differed in levels of complexity and origin according to the sporting venue. With increasing levels of demand for conference activity at UK sporting venues, the employment of market segmentation methods offers a venue the opportunity to improve its overall commercial effectiveness. Interviews further highlighted how clients at sporting venues vary in size and nature, from small, local companies to regional or national associations through to large multi-national organisations, all enticed by the combination of the venue's uniqueness, flexibility and distinct heritage. Darlaston (2007) noted how at The Belfry Hotel and Country Club, Segmentation Targeting Planning (STP) is undertaken to identify key target markets and clients. It was evident how STP offered the sporting venue the chance to select different market segments, followed by client type, to decide upon appropriate targeting activities. This approach differed to other case study venues,

where less formal approaches to market segmentation were applied. However, both Kenton (2007) and Watts (2007) confirmed that clients from many different industries, and of different sizes, used their sporting venue for conference activity.

The targeting of smaller, local companies by sporting venues was noted by Kenton (2007) at Arsenal Football Club, thus concurring with Anderson (2006, cited in Colston, 2006a) who stated that elsewhere in London at Chelsea Football Club: "We know our market, and the launch of our small meetings package was a direct response to its demand.". On this topic, McCabe et al. (2000) and Colston (2007b) identify the attraction of sporting venues to a wide client base which has been confirmed by the research. The profile of conference delegates at sporting venues was discussed during the interviews. As conference planners select venues which will appeal to both male and female attendees, it is important for the conference products at sporting venues to appeal to both sexes. Kenton (2007) and Watts (2007) both commented on the attraction of Arsenal Football Club and UK racecourses respectively to male and female delegates.

Consideration was also being given at each case study venue to the overwhelming balance of female conference organisers within the UK, and the contributing factors to their site selection decisions. It has been argued by Derrick (2002) that sporting venues: "appeal more to a male market", with Richards (2003) highlighting that some venues have: "made a conscious decision to target female event organisers" to redress the balance. From interview results, it may be concluded that sporting venues are now being seriously considered by conference planners at all levels and for the enjoyment of both sexes.

In addition, Watts (2007) raised a topical point of discussion during interview research in noting that the personal interests of the conference planner often contribute to the final venue selection process. Existing knowledge of sporting venues, whether from personal interests external to work or from word of mouth, has been shown to contribute to overall venue selection. Research by Ariffin & Ishak (2006, p.111) highlighted how: "the novelty preference for meeting destination choice is influenced by the structural pattern of the corporate organization in which the meeting planner works.". Therefore, often the lack of formal guidelines for conference venue selection allows the introduction of the planner's own interests. This may be seen as a little surprising considering the dominance of female UK conference planners, but further emphasizes the strong impact of the profile of sport within modern-day society.

Findings of Questionnaires to Sporting Venue Conference Staff

The importance of an effective and comprehensive sporting venue website emerged from the sample group. This is in agreement with Davidson & Cope (2003) who highlight its increasing usage in modern-day commerce. In addition, research provided many different responses on the issue of effective marketing communications techniques by sporting venues, showing how the use of familiarisation trips, trade shows and personal recommendations are all considered productive. The lack of support towards trade journals and direct marketing campaigns indicates how the conference industry has evolved, with traditional marketing techniques no longer proving the most effective or productive for many UK sporting venues.

A further research question centred around the use of market segmentation techniques by sporting venue staff. It is intriguing to note how the majority of the

sample group are aware of the various segments of the conference industry that their venue attracts, and subsequently differentiate their marketing activities accordingly. Responses to this question highlighted how sporting venues use geographic and industry criteria to segment their customer base, in addition to the nature of the client, i.e. association or corporate. Several responses drew attention to the fact that venue activities were reactive to customer enquiry levels, and dependent upon internal influences by Business Development and Marketing Communications staff. Emphasis was also given to targeted advertising in industry or geographical areas to enhance the penetration of new markets. Research by both McDonald & Dunbar (1998, p.29), and Kotler & Armstrong (2006, p.47), illustrates the advantages offered by using such techniques to better target customers.

The greatest proportion of questionnaire responses came from corporate conference planners. This concurs with research by Lawson (2000, cited in Davidson & Rogers, 2006, p.4) who notes that corporate activity is estimated to: “constitute over 65% of all meetings.” It would further prove intriguing to review whether the increasing percentage of corporate planners using sporting venues (Walsh, 2007, cited in Colston, 2007a, p.34) would remain.

Research investigating how conference planners found new ideas for venues added weight to existing research by Davidson & Cope (2003) in highlighting the importance of the internet. With an increasing amount of sporting venues incorporating a website as part of their marketing communications strategy, it appears that the internet is actively substituting traditional marketing methods including trade journals and direct marketing campaigns, both of which were distinctly absent from research responses. The use of a familiarisation trip to a conference venue also proved popular for conference planners in the sample group, with McCabe et al. (2000) stressing the value of experiencing a venue first hand.

In considering the determining factors for sporting venue site selection, paramount factors of the venue location, its individual uniqueness, and the flexibility of the meeting space became evident. The cost of conference activity at sporting venues proved a key consideration for only a small number of respondents. The prestige associated with a successful sports team and the venue’s added value elements, including a stadium tour, did not receive significant interest from the sample group. These research findings agree with Redford (2006) who emphasizes particular selling points of sporting venues including site location and uniqueness.

DISCUSSION OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

The Significance of Market Segmentation to UK Sporting Venues

In order to conclude whether UK sporting venues can use market segmentation to improve their effectiveness at targeting the conference market, it is first necessary to review several of the key messages derived from the research. Many authors including McCabe et al. (2000) and Colston (2007b) highlight how interest in conference activity at sporting venues originates from a wide client base. These findings have been confirmed from the research, both at case study venues and through questionnaire responses. Primary research indicated how enquiries for conference custom are more likely to be generated from clients in the locality of the UK sporting venue, rather than from further afield. Here, both Darlaston (2007) and Kenton (2007) emphasize the importance of local clients to their respective sporting venues, and the efforts made to maintain these relationships.

It has been shown during the research how UK sporting venues in the sample group are aware of market segmentation techniques, and for over half of the respondents, this actively results in varied marketing communications approaches. Such strategies are summarised by Dibb & Simkin (1996) who note how: “a better understanding of customer needs and wants can lead to more carefully tuned and effective marketing programmes; greater insight into the competitive situation, and more effective resource allocation.”. These findings support research by McDonald & Dunbar (1998) and Birn (2004) who highlight how organisations may sub-divide their customer base as a means of generating competitive advantage. Kotler & Armstrong (2006) further stress the benefits of identifying smaller market segments to allow greater overall commercial penetration through the effective use of marketing resources and by matching individual client needs.

Perhaps the most defined presence of market segmentation techniques currently employed by a UK sporting venue in the sample group was illustrated at The Belfry Hotel and Country Club by Darlaston (2007). The use of Segmentation Targeting Planning (STP) to identify key target markets and clients is an approach which the sporting venue has used to its advantage. With many different conference market audiences, Darlaston (2007) noted how market segments, client type and geographical location were all used by conference staff to determine venue marketing activity. It proved noticeable how this approach was in far greater depth, and generated more discussion, than at other case study sporting venues. Furthermore, the targeting of smaller companies by, and the profile of conference delegates at, UK sporting venues have been reviewed during the research. Firstly, as an active segment of the conference market, Small and Medium-sized Enterprises (SME's), often with less than 250 employees, provide much potential conference custom to sporting venues. In particular, Kenton (2007), agreeing with Anderson (2006, cited in Colston, 2006a), revealed how Arsenal Football Club actively target SME's to generate increased conference interest. This is combined with entertaining larger and more high profile multi-national organisations. Darlaston (2007) and Watts (2007) also expressed an awareness of the importance of SME's to The Belfry Hotel and Country Club and Pegasus Venues respectively.

Secondly, research indicated a distinct lack of concern by sporting venues on the attraction of female delegates to events, who provide a further market segment for

attention. These findings contradict research by Richards (2003) who highlights that some venues have actively: “made a conscious decision to target female event organisers”. From a delegate perspective, the use of sporting venues for conference activity has traditionally been shown to: “appeal more to a male market”, as Derrick (2002) notes. This topic provides a potential area for further research which could prove beneficial to a wide variety of UK sporting venues, particularly given the dominance of female event planners in the industry as a whole, and the importance of their own event interests and experiences. It could be reviewed whether changing perceptions of the conference experience at sporting venues have increased female delegate attendance, and subsequently consider future levels of repeat attendance.

The increasing commercial importance of the internet has also impacted on marketing techniques employed by UK sporting venues. Many venues indicated in questionnaire responses that their own website proved an effective and important form of marketing, one which was frequently accessed by potential clients. Comprehensive website information and the use of online technology allows the conference planner to carry out a ‘virtual tour’ of the location and its conference rooms, together with accessing details of room specifications and transportation access, for example. Such venue marketing has incorporated market segmentation methods, as research highlighted that some sporting venue websites include conference details for commercial clients in one area, and content for individual or family events on separate pages. This helps to distinguish between different venue target audiences. These findings support research by Davidson & Cope (2003) who illustrate the increasing use of internet technology in the conference industry.

The Implementation of Market Segmentation

For UK sporting venues not currently employing market segmentation techniques in conference activity, there are many considerations in the decision making process. Firstly, the constant emergence of new venues to the UK conference market demands greater effectiveness and service performance from existing venues to counter the competition. In order to generate competitive advantage, it is achievable for a UK sporting venue to implement market segmentation techniques by avoiding a constant marketing approach to all, and by utilizing the effective allocation of resources. These findings support research by McDonald & Dunbar (1998, p.29) who stress how market segmentation: “can be used to gain competitive advantage by considering the market in different ways from your competitors.”. Secondly, UK sporting venues must consider whether potential implementation of market segmentation techniques is a practical solution. Issues associated with the co-ordination of activities across several departments may hinder its introduction, for example. When considering this issue, Dibb & Simkin (1996) add how: “although a particular scheme may pinpoint key customer groups more precisely, existing organisational and distribution structures may present implementation difficulties.”. Therefore, despite potential benefits from the use of new techniques, it may be hazardous to assume their straight-forward commercial introduction.

Thirdly, distinct methods of market segmentation require consideration as to how the target audiences will be approached, if such techniques are to be employed by venues. Research has illustrated how some UK sporting venues segment their audience by geographic location, nature of the event, or industry type, for example, in order to maximise market success. It is the use of these focused approaches, and other similar

criteria, which will determine the effectiveness of any new marketing activities. Considering the increasing size and competitiveness of the UK conference market, as noted from research findings, such techniques should be used to the advantage of the individual sporting venue over industry competitors. Without the necessary dedication in this area, the time, money and effort given to market segmentation techniques may easily be wasted.

Key Trends from Research Data

Whilst conducting and analysing the research data, it became evident that several trends existed in the use and marketing of sporting venues. Firstly, the importance of the overall delegate experience was paramount to both the event venue and organiser. Being able to maximise this experience through the use of added value features including stadium tours, scenic meeting rooms, and links to historical achievements was a consideration to be emphasized by sporting venue staff. In addition, the increasing interest from organisers in these venues, often to the detriment of traditional conference hotels and centres, mirrors a wider growing opinion that the dominance of hotels in the industry could well be removed before too long. By investing in the latest technological equipment, through offering improved standards of catering, and benefiting from an increased profile of sport throughout the country as a whole (particularly appropriate at the time of writing with the forthcoming FIFA World Cup in South Africa), sporting venues position themselves well for a strategic attack on industry competition.

Research also indicated that organisers are now using a variety of methods to source venue information. The inclusion of virtual tours on venue websites, attendance at industry exhibitions such as International Confex, and personal time spent by organisers at the venue on site visits are all strategically used by sporting venues to entice the often female event planner. Gaining this high-profile industry stance and competing on terms with other more established venues looks to be a winning formula to be pursued by sporting venues for future periods.

The Future for Sporting Venues

This piece of research has identified the growing appeal of sporting venues as hosts of conferences, meetings and events. Looking forward, it can confidently be predicted that large-scale investments, similar to those already highlighted, will continue at other venues, all looking to gain distinctive financial and commercial benefits. The effective use of marketing strategies, such as attendance at industry exhibitions and adverts in popular trade press, all act to reinforce the availability of sporting venues to the event industry, and attract an increasing percentage of event organisers. In such a competitive marketplace and with an ever-growing supply of alternatives, sporting venues can nurture this industry popularity into longer-term success.

IN CONCLUSION

It may be concluded that UK sporting venues can use market segmentation to improve their effectiveness at targeting the conference market. This market offers many practical, commercial and financial rewards to venues able to attract both frequent and first-time conference custom. The recent popularity of UK sporting venues in the conference market, a trend emphasized by both primary and secondary research, is a clear indicator that their presence is now being fully developed. This subsequently provides a lucrative additional function for the venue on non-match or race days. Contact with sample group sporting venues illustrated how many different approaches may be adopted to target conference custom. Ultimately, it is the intensity of expansion and enhancement of such approaches which will determine overall success, and generate competitive advantage.

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