



Union Cycliste Internationale cycling events

Powering local economies

Annual review of 2019





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01

Executive summary



In 2019, UCI World Championships and UCI World Cup events were staged in **23 countries**

UCI events bring millions of people together each year to celebrate the sporting achievements of both elite and amateur athletes, attracting spectators and wider audiences from across the globe. There is a huge variety of UCI events covering all cycling disciplines, ranging from major events such as the UCI Road World Championships, to smaller events such as the UCI Indoor Cycling World Championships. This variety means different UCI events appeal to a wide and diverse audience and require different levels of operational support and investment in order to achieve success.

Cycling events drive significant economic and social impacts

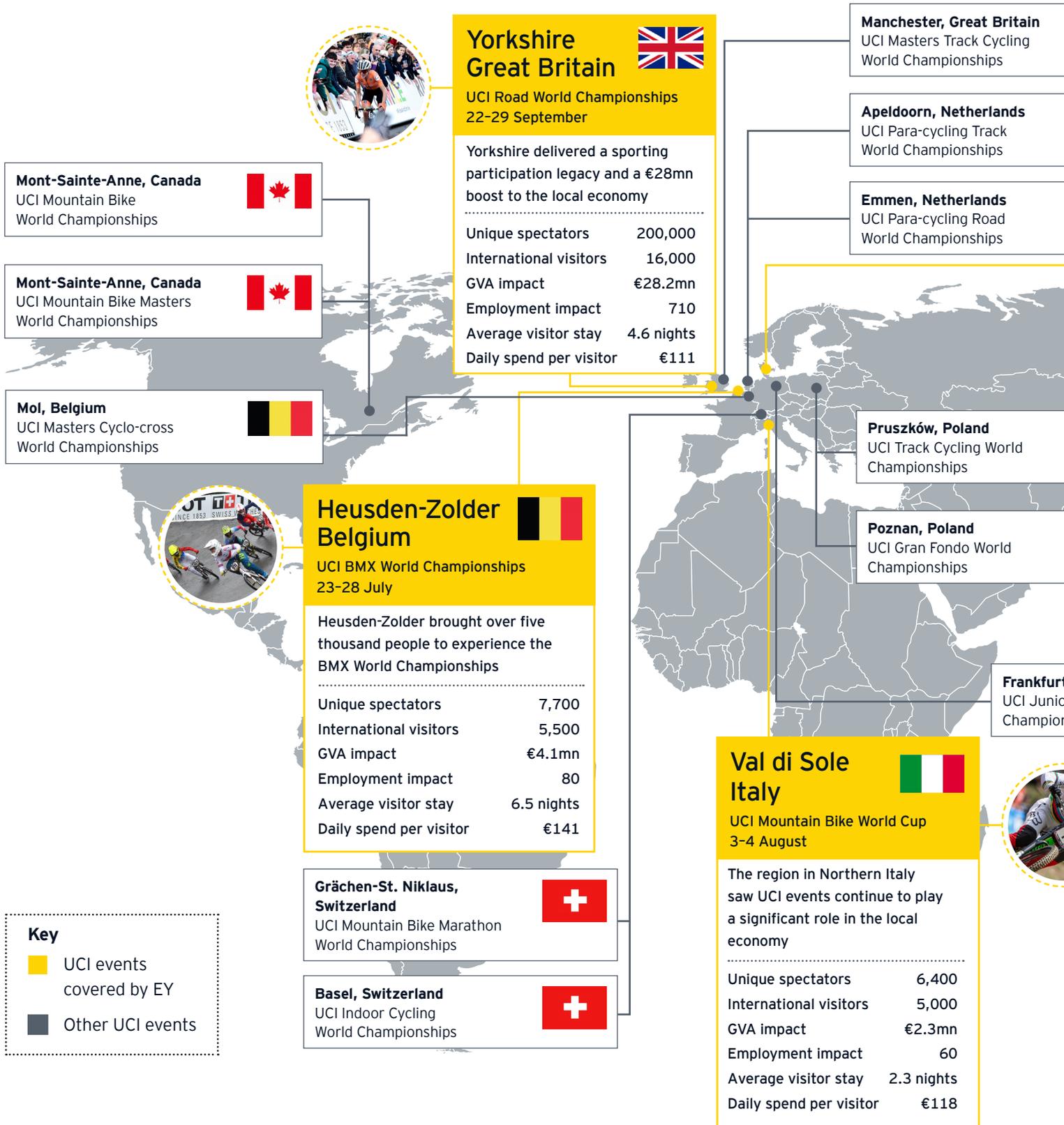
These events provide a platform for the participating athletes and teams to test their abilities and offer the event hosts an opportunity to showcase their region, attracting significant numbers of new visitors and often large numbers of professionals and volunteers to deliver the event.

The economic impacts of these events are only one part of the total impact they may generate. Cycling events drive a broad range of impacts beyond economic benefits.

These include branding opportunities events offer to host regions, physical and mental health benefits that arise through participation, boosts to civic pride and community cohesion from hosting a successful event, and knowledge developed through the event-hosting experience.

Selected UCI events from 2019

The map shows the 2019 UCI World Championships and a selected UCI World Cup event. The four events highlighted have been assessed by EY.





**Bogense
Denmark** 

UCI Cyclo-cross World Championships
2-3 February

High levels of spending in Bogense generated a boost of over €3mn for the local economy

Unique spectators	10,100
International visitors	5,200
GVA impact	€3.6mn
Employment impact	85
Average visitor stay	2.5 nights
Daily spend per visitor	€140




Chengdu, China 

UCI Urban Cycling World Championships



Berlin, Germany 

UCI Track Cycling World Championships



78
total events
hosted

Over **7,000**
people competed in
UCI events

Representatives of
99
nations took part in
UCI events

€38.2mn
economic impact
generated by four
events alone

This report explores the economic impact of UCI World Championship events and a UCI Mountain Bike World Cup event in 2019. The findings summarised within this report are based on research conducted by EY on behalf of the UCI throughout 2019.

In particular, this report focuses on four main channels that drive economic impact:

- ▶ **Visitors:** who spend money on local goods and services, boosting the host economy
- ▶ **Media and teams:** who spend time in the host region while competing and covering the event
- ▶ **Event delivery:** including the spending of event partners, and other activity required to stage the event
- ▶ **Event engagement:** the sporting, personal, tourism and business connections made through the event and how they drive future economic activity

The report provides detail on each of the events, while the appendix summarises the economic impact methodology. Two impact measures in particular are used within this report:

- ▶ **Gross Value Added (GVA):** a measure of economic activity typically used to measure activities taking place below the national level, such as state/region, industry/sector, or individual business or event. GVA can be viewed as the incremental contribution to Gross Domestic Product.
- ▶ **Employment:** employment impacts are presented in terms of annual employment equivalents. The employment supported in the period immediately surrounding the event may therefore be larger.

02

Yorkshire (GBR)

UCI Road World Championships



A group of cyclists is riding on a road through a wooded area. The cyclists are wearing various colored jerseys and helmets. The lead cyclist is wearing a black jersey with 'AUSTRALIA' and 'BMC' visible. The background shows dense green trees and foliage. A yellow vertical bar is on the left side of the page.

200,000 unique spectators attended the event, with **67,000** from outside Yorkshire, delivering a **€28mn** boost to the Yorkshire economy

The UCI Road World Championships

2019 brought the flagship event of world cycling to Yorkshire in the United Kingdom. The investment into this event brought thousands of visitors to Yorkshire, alongside competitors from 67 nations, media and officials, while showcasing both Yorkshire and the United Kingdom to an international audience.

These events bring the world’s best road cyclists together each year to compete on the roads, streets and avenues of the host towns, cities and regions. This format brings unique course management challenges, but also presents competitors with the opportunity to compete in spectacular locations.

In total, 67 nations were represented in Yorkshire, competing in often challenging weather conditions between Sunday, 22 September and Sunday, 29 September. The single largest contingents of riders came from France and Italy (39 and 38 respectively), while Great Britain entered the third-highest number of riders (37).¹

UCI Road World Championships events

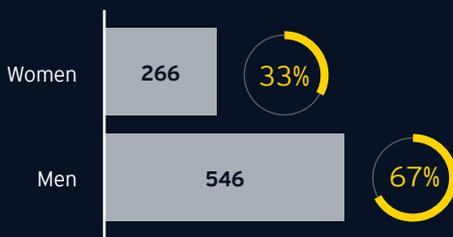
Individual Time Trial

- ▶ Men’s and Women’s Elite
- ▶ Men’s and Women’s Junior
- ▶ Men’s Under 23

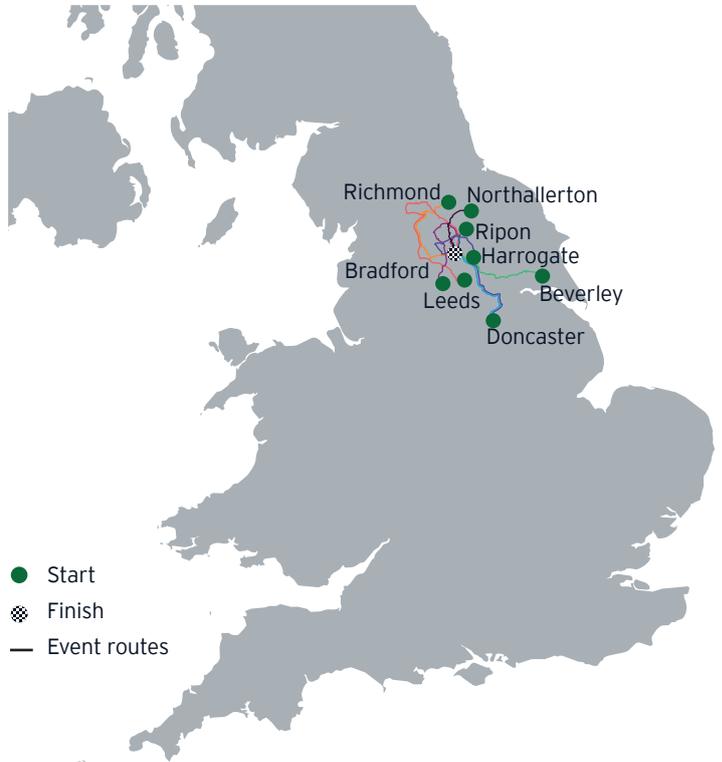
Road Race

- ▶ Men’s and Women’s Elite
- ▶ Men’s and Women’s Junior
- ▶ Men’s Under 23

Participation by gender



Yorkshire in Northern England



Yorkshire and Harrogate

Yorkshire is the largest historic county in the United Kingdom with a population of over 5.3m.² The region is divided into four modern-day counties: North Yorkshire, West Yorkshire, South Yorkshire, and the East Riding of Yorkshire; each of which played host to different events throughout the Championships.

Harrogate, the focal point for the Championships and home to 72,000 people, is one of the most visited towns in the United Kingdom.³

The region has a recent history of cycling events, hosting the Grande Depart of the Tour de France in 2014 over a period of two days, as well as the Tour de Yorkshire, running annually since 2015.⁴

It has a proud sporting history, noted as the official origin of club football and home to a successful Cricket team and to a large number of Olympic medallists including holders of seven gold medals in London 2012.

¹ Some athletes competed in several races

² Source: 2018 population estimates, Eurostat via Oxford Economics

³ Source: Visit England

⁴ Source: Welcome to Yorkshire



Drivers of economic impact

Total attendance over the course of the event was estimated at 712,000 spectators, with over 200,000 unique spectators, 67,000 of which had travelled from outside of Yorkshire.⁴

These visitors, along with 849 media staff and 2,100 team members, helped to drive substantial economic activity within the region. As a result of the event an additional €28.2mn of economic activity was generated within Harrogate and the wider county of Yorkshire, equivalent to supporting 710 jobs.

In Harrogate the event generated €20.1mn in economic activity, supporting 610 jobs.

Visitors underpinned 80% of the economic impact, through their spending during their stay in the region. The remaining impact was supported by the spend of media and teams (14%) and the operational delivery of the event itself (6%).



€28.2mn

total GVA impact from the UCI Road World Championships

710

total employment supported by the UCI Road World Championships

712,000

total attendance

200,000

unique spectators

€28.9mn

total visitor spend

What made Yorkshire unique?

Yorkshire is popular tourist destination both for international visitors and those from within the United Kingdom. This is due to both its rich history and Roman heritage, as well as its national parks, which are well known for the beauty of their natural landscapes. Despite record levels of rainfall, the 2019 UCI Road World Championships attracted significant visitor numbers, with 16,000 international visitors and over 50,000 visitors from elsewhere in the United Kingdom, despite record levels of rainfall during the event.

Spending by non-local visitors made up the vast majority of visitor expenditure (€21.1mn of €28.9mn), driving a substantial share of the economic impact generated.

849

media staff covered the event

€600k

total visiting media spend

2,100

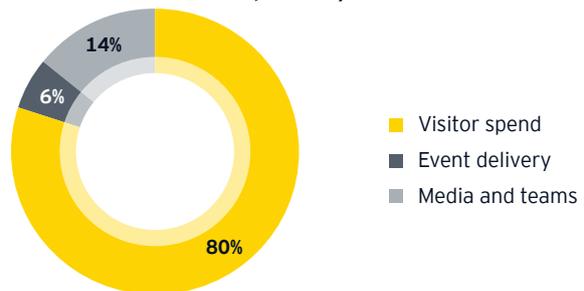
members of competing teams

€3.1mn

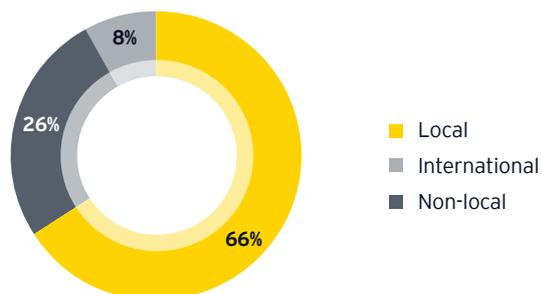
total visiting team spend

Source: EY analysis

Breakdown of GVA impacts by source



Origin of visitors to the UCI Road World Championships in Yorkshire



Source: EY analysis

⁴ Unique visitors, rather than unique spectators, are the main driver of the economic impact. This is because unique spectator figures include residents from within Yorkshire, whose expenditure throughout the course of the event is not considered additional to the region. EY used independent crowd size estimates conducted by Yorkshire 2019 and Steer Group as points of reference to ascertain measures of the numbers of unique and total attendance on each day of the event.

The event had a positive social impact on local spectators

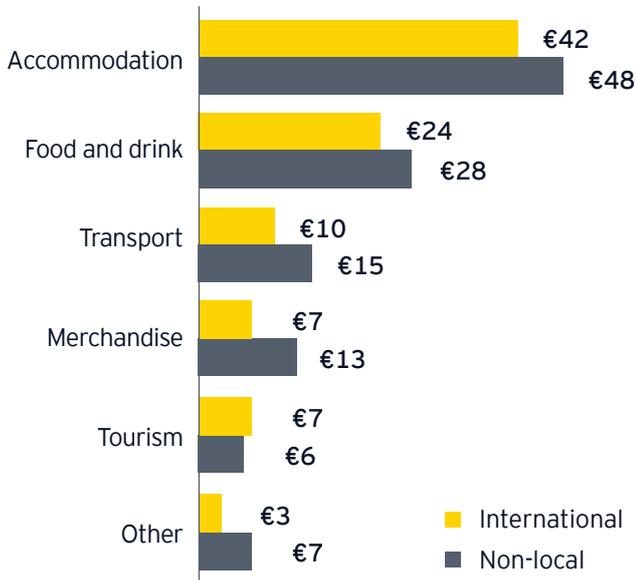
Local residents were one of the key groups impacted by this event. Interviews with these spectators showed that they found themselves encouraged to do more physical activity (79%), while 80% felt proud that the event was being hosted in Yorkshire.

While levels of satisfaction among locals was high – 82% were satisfied or very satisfied with the event – it was not viewed as overwhelmingly positive; 8% reported being very dissatisfied. Similarly, some local businesses noted a reduction in business traffic, while others closed for the duration of the event.

However, reviews from visitors were very positive, with 86% of international visitors willing to recommend the location for a holiday.

International and non-local visitor spending includes only those spectators that either travelled to Yorkshire specifically for the Event, or extended their stay for it.

Average visitor spend per person per night, by category (€)



Average number of nights stayed by tourist origin

Origin	Length of stay (nights)	Daily spending per visitor (€)
International	6.1	92
Non-local	4.1	117

Figures in table may not reconcile with chart due to rounding

Source: EY analysis

Local visitors are those who live within the region of the event, while non-local visitors are from the same country, but a different region.

Online engagement with the UCI Road World Championships was also successful, with a high number of views and interactions across digital media.

Instagram

- ▶ Approximately **2mn** video views
- ▶ **17mn** impressions

Twitter

- ▶ **938k** impressions made by the top three posts about the Road World Championships
- ▶ **3.6mn** video views

Facebook

- ▶ **11,000** new fans during the event
- ▶ **2.8mn** video views, with **3mn** minutes of watch time

The UCI Road World Championships were broadcast in **118** countries, with a cumulative audience of **329mn**.

Gross value added

Additional economic activity is quantified by gross value added (GVA). GVA – defined as the value added from production – is broadly equivalent to wages + profits. Therefore, for every £1 spent by a visitor, only a portion of this will translate directly into GVA (direct economic impacts), with the rest going towards suppliers' costs. Further GVA impacts are then generated indirectly where there are benefits further down the supply chain, or where wage income is re-spent locally.



A photograph of a BMX rider in an orange and black outfit performing a trick on a dirt track. In the background, a large crowd of spectators is seated in bleachers, and a banner for 'TOYO TIRES' is visible. A large yellow 'OCB' logo is overlaid on the top left of the image.

OCB

Heusden-Zolder (BEL)

UCI BMX World Championships

Over **7,000 spectators** attended the event, contributing over **€4mn** to the local economy

The UCI BMX World Championships, UCI BMX Supercross World Cup and the UCI BMX World Challenge

The UCI BMX World Championships is the key event in the BMX calendar. The winner of the event is crowned the UCI BMX World Champion.

The event is conducted alongside a series of UCI BMX Supercross World Cup races throughout the year, taking place in Europe, North America and South America.

The UCI BMX World Challenge takes place just prior to the UCI BMX World Championships. It is a competition for amateur BMX riders, bringing participants of all ages to the Championship events. The additional spectators brought to the event by the UCI BMX World Challenge will have had a direct effect on increasing the economic impact in Heusden-Zolder.

7,000 unique spectators attended the UCI BMX World Championships in Heusden-Zolder, Belgium over a period of five days.

There were 236 riders at the event, with representatives from 37 nations. The single largest contingent of riders came from France, with 21. Eight nations were represented by a single member.



Manchester, United Kingdom
 UCI BMX Supercross World Cup



Papendal, Netherlands
 UCI BMX Supercross World Cup



**Heusden-Zolder
 Belgium**

UCI BMX World Championships
 23-28 July

Heusden-Zolder brought over five thousand people to experience the BMX World Championships

Unique spectators	7,700
International visitors	5,500
GVA impact	€4.1mn
Employment impact	80
Average visitor stay	6.5 nights
Daily spend per visitor	€141



St-Quentin-en Yvelines, France
 UCI BMX Supercross World Cup



Key

- UCI events that EY has covered
- Other UCI events

Heusden-Zolder

Heusden-Zolder is a municipality located in the Belgian province of Limburg in the region of Flanders. It has a population of just over 30,000.⁵

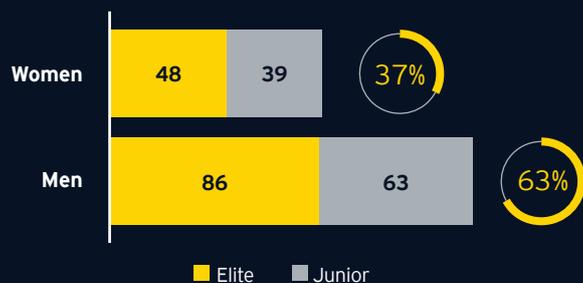
The area has consistently hosted rounds of both the UCI BMX World Cup and the Telenet UCI Cyclo-Cross World Cup each year for the past decade.⁶



UCI BMX World Championships events:

- ▶ Men's and Women's Elite
- ▶ Men's and Women's Junior

Participation by gender



⁵ Source: Eurostat

⁶ Source: UCI





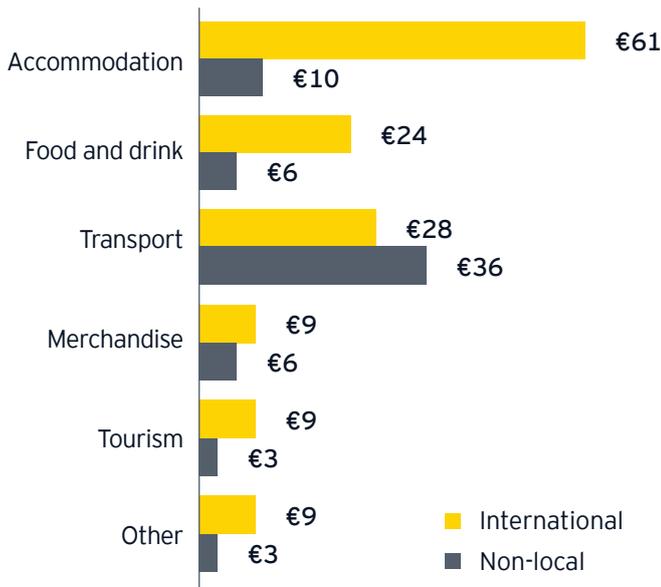
Drivers of economic impact

Visiting spectators were the main driver of the economic impacts of the UCI BMX World Championships in Heusden-Zolder. In total, attendance was recorded at 30,000 over the five-day event, made up of 7,000 unique attendees who on average attended 4 days of the event.

Over the course of their stay, 5,500 international visitors contributed €5.2mn in direct spending into the region, particularly through spend on accommodation and transport.

The total GVA impact on the Heusden-Zolder region resulting from this expenditure was €4.1mn, equivalent to 80 jobs.

Visitor spending per night, by category

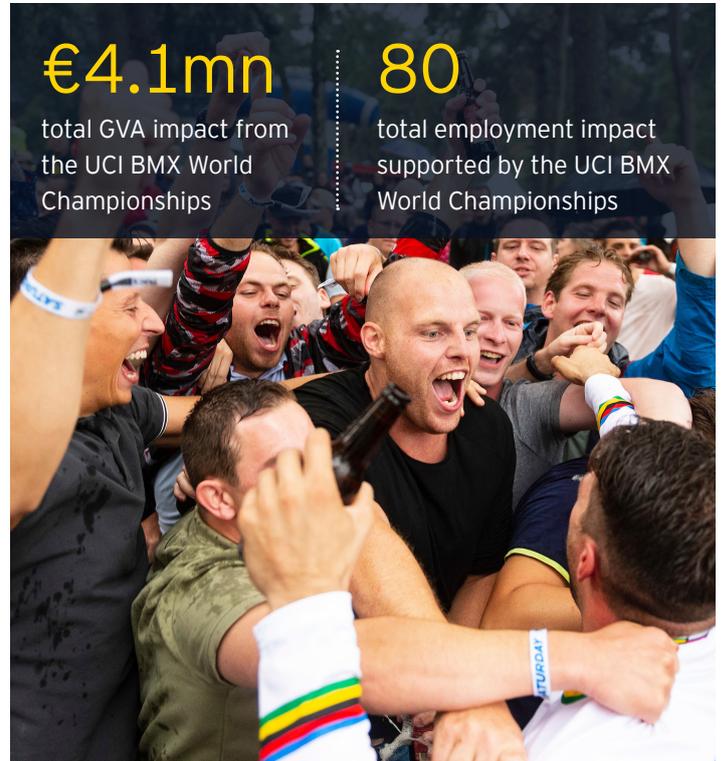


Source: EY analysis

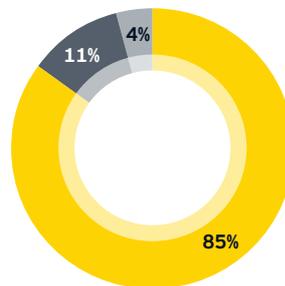
What made Heusden-Zolder unique?

Heusden-Zolder was unique in that international visitors stayed for an average of 6.7 nights, a relatively long duration in comparison to similar events, and significantly longer than non-local attendees. Their spending was also high, averaging €141 per person per night.

This meant that much of the spending associated with the event was additional to the region, which drove a high level of economic impact, particularly relative to the scale of the event itself.



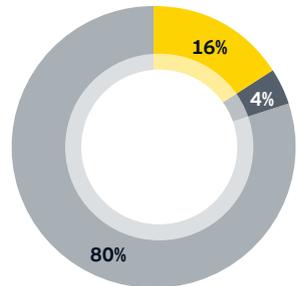
Breakdown of GVA impacts by source



- Visitor spend
- Event delivery
- Media and teams

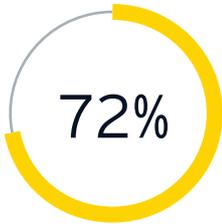
Source: EY analysis

Origin of visitors



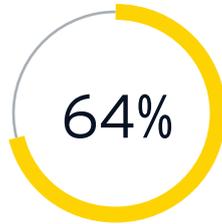
- Local
- International
- Non-local

High levels of satisfaction among international and local visitors



International visitors stating they were satisfied or very satisfied with the event

Source: UCI, EY analysis



Local visitors stating they were satisfied or very satisfied with the event

The event received relatively high satisfaction levels, particularly among visiting international attendees. Most of the international visitors were from European countries, including Belgium, France, the United Kingdom and Germany.

While local residents were generally satisfied with the event, 17% were dissatisfied or very dissatisfied.

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
Teams	6.3	48
International visitors	6.7	141
Non-local visitors	2.9	66

Figures in table may not reconcile with chart due to rounding

Source: EY analysis

Online engagement with the UCI BMX World Championship event was also successful, reaching one million people through Facebook alone.

Instagram

- ▶ **67k** unique accounts reached
- ▶ **11,700** likes

Twitter

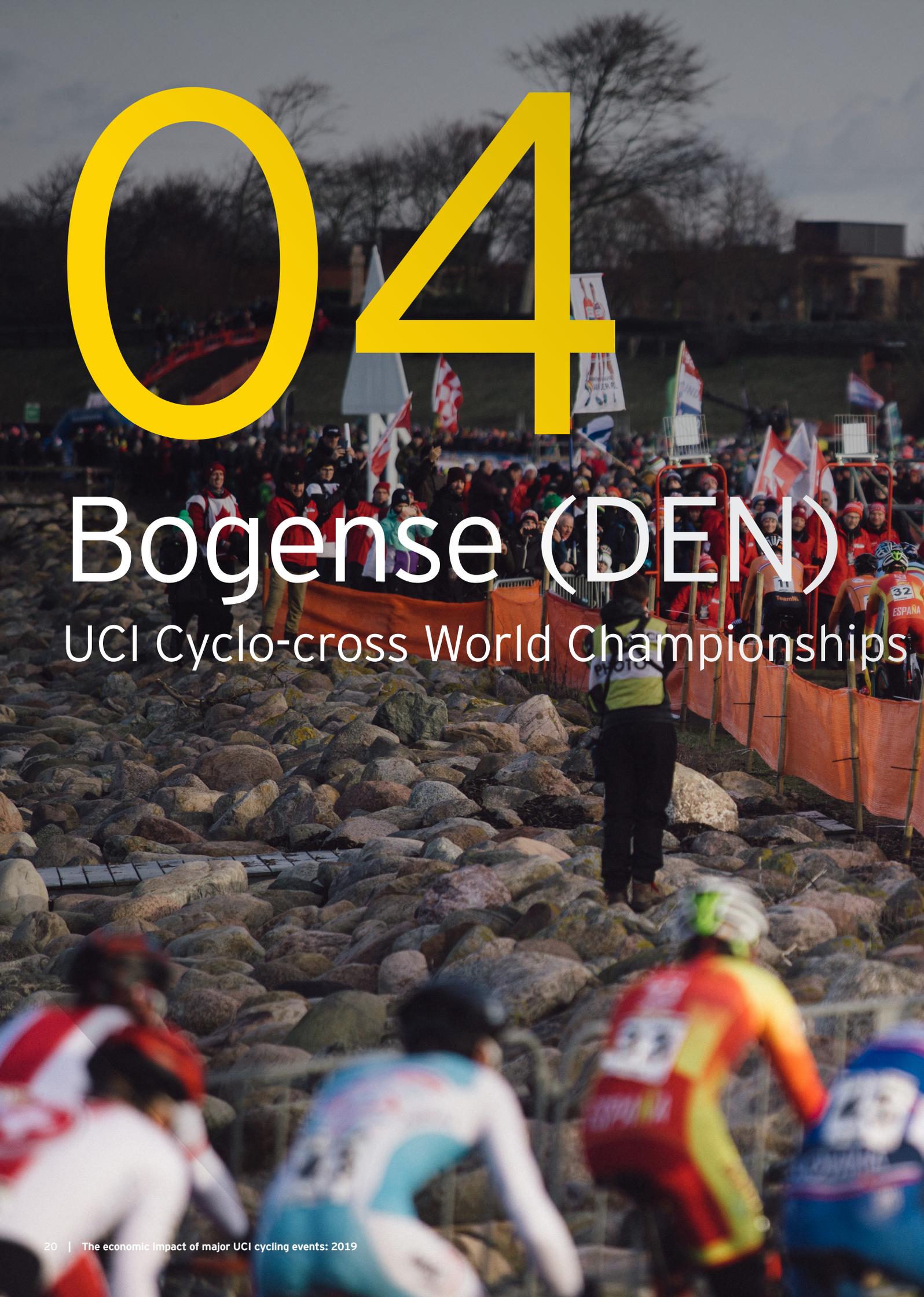
- ▶ **387k** twitter impressions
- ▶ **61,900** video views

Facebook

- ▶ **443k** video views
- ▶ **1mn** cumulative reach

The UCI BMX World Championship event was broadcast in **110** countries, with a cumulative audience of **13mn**.





04

Bogense (DEN)

UCI Cyclo-cross World Championships

A large crowd of spectators and cyclists is gathered at a cycling event. In the foreground, several cyclists are visible, wearing colorful jerseys and helmets. The background is filled with people, some standing and some sitting, watching the event. There are banners and flags visible, including one for 'SUPPORTERS CLUB' and another for 'WORLD & MATHEU'. A sign for 'WC' is also visible. The overall atmosphere is one of a major sporting event.

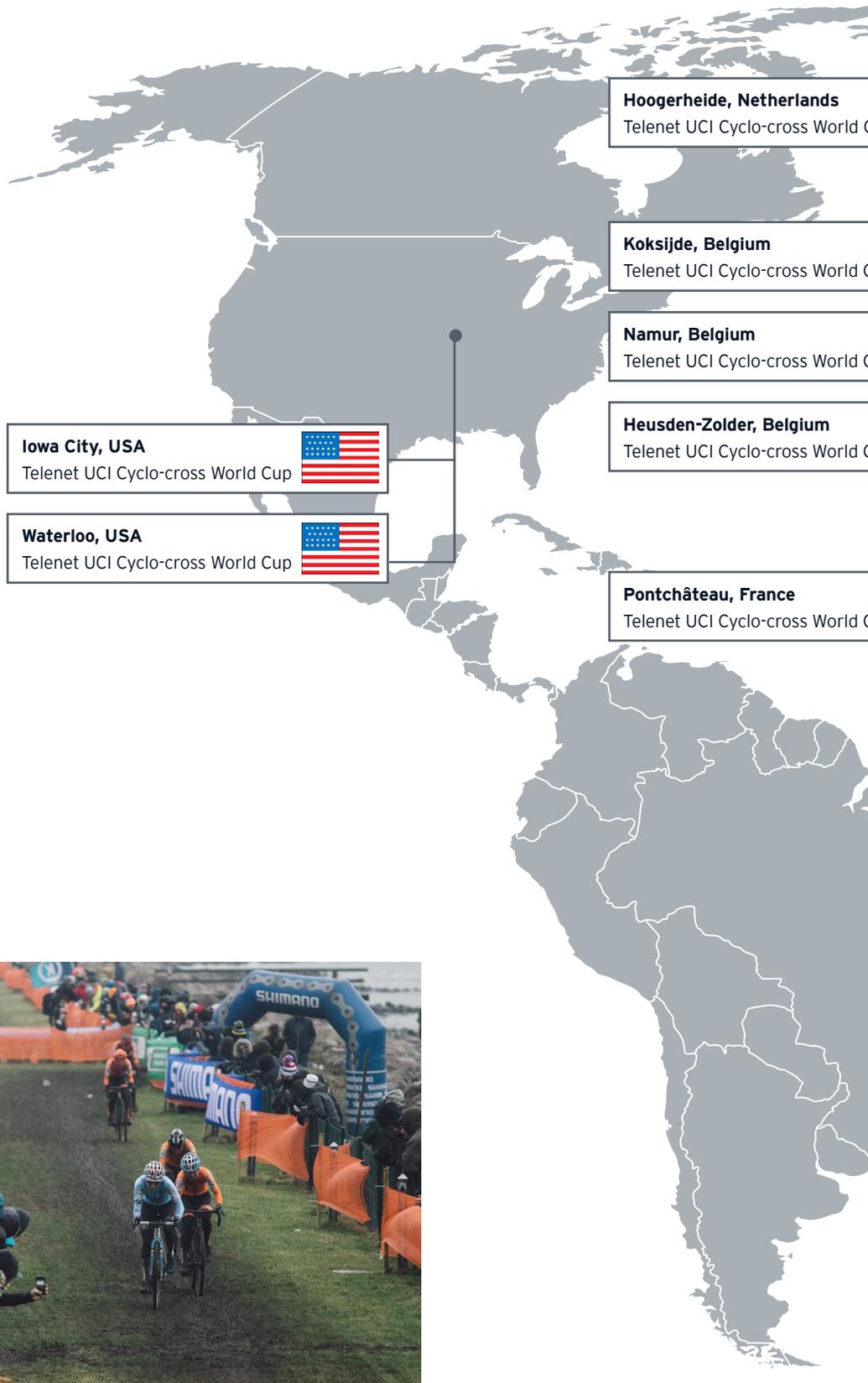
Over **10,000** unique spectators attended the championships in Denmark, contributing **€3.6mn** to the local economy

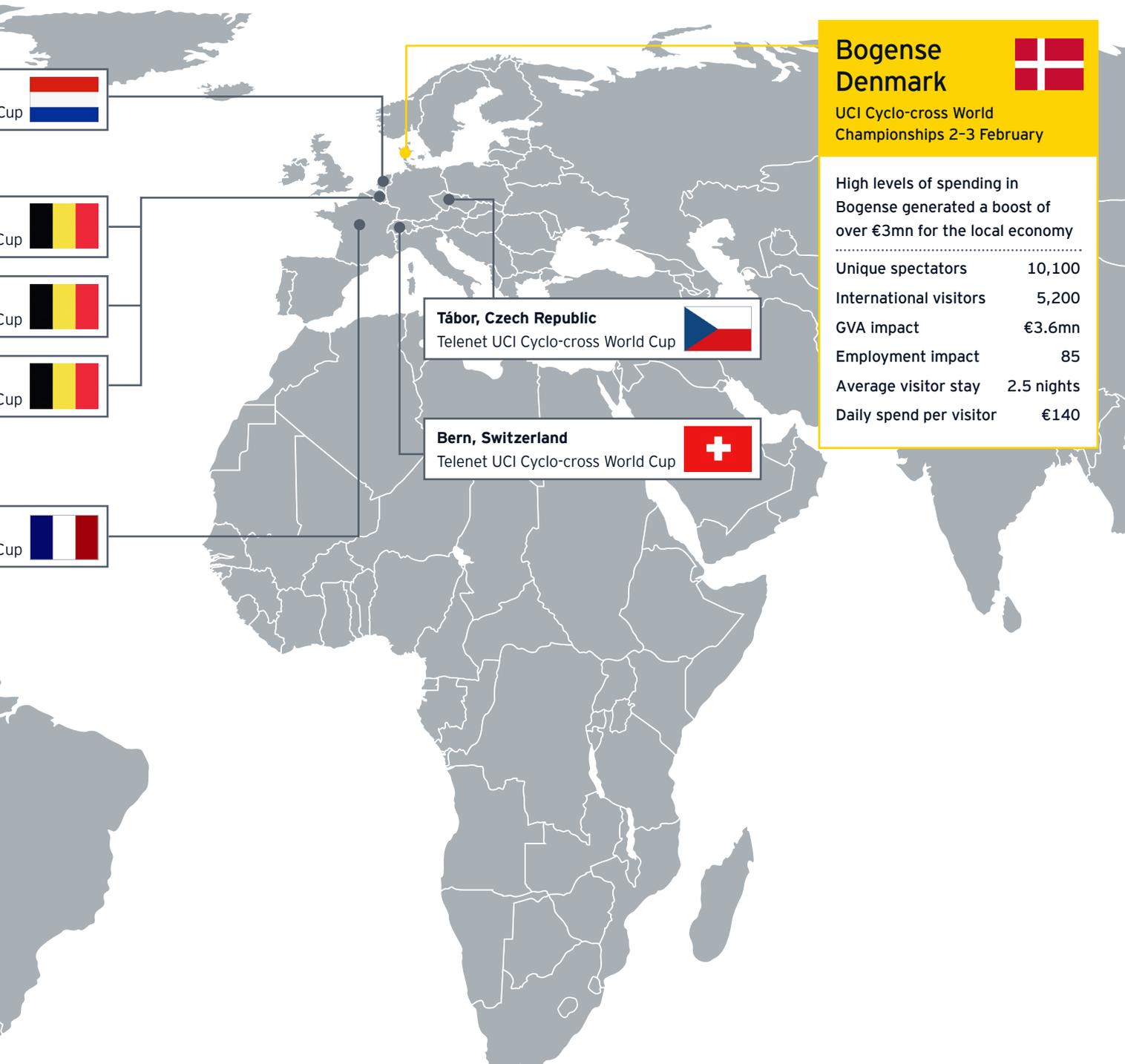
UCI Cyclo-cross World Championships and the Telenet UCI Cyclo-cross World Cup

The 2019 UCI Cyclo-cross World Championships brought this flagship event to Denmark for the first time in over 20 years. Thousands of visitors travelled to Bogense, alongside competitors from 24 nations, media and officials, while showcasing both Bogense and Denmark to an international audience.

Bogense had previously played host to a round of the Telenet UCI Cyclo-cross World Cup in the 2017-2018 season, with this being the second time the UCI World Championships have been held in Denmark, with the last time in 1998.

Riders from 24 nations travelled to Bogense to compete in the UCI Cyclo-cross World Championships, with 280 riders in total. The single largest contingent of riders came from the Netherlands, with 30 competitors, followed by Belgium with 27, while only two teams were represented by a single competitor.





**Bogense
Denmark** 

UCI Cyclo-cross World
Championships 2-3 February

High levels of spending in Bogense generated a boost of over €3mn for the local economy

Unique spectators	10,100
International visitors	5,200
GVA impact	€3.6mn
Employment impact	85
Average visitor stay	2.5 nights
Daily spend per visitor	€140

Tábor, Czech Republic 
Telenet UCI Cyclo-cross World Cup

Bern, Switzerland 
Telenet UCI Cyclo-cross World Cup

Key

-  UCI events that EY has covered
-  Other UCI events

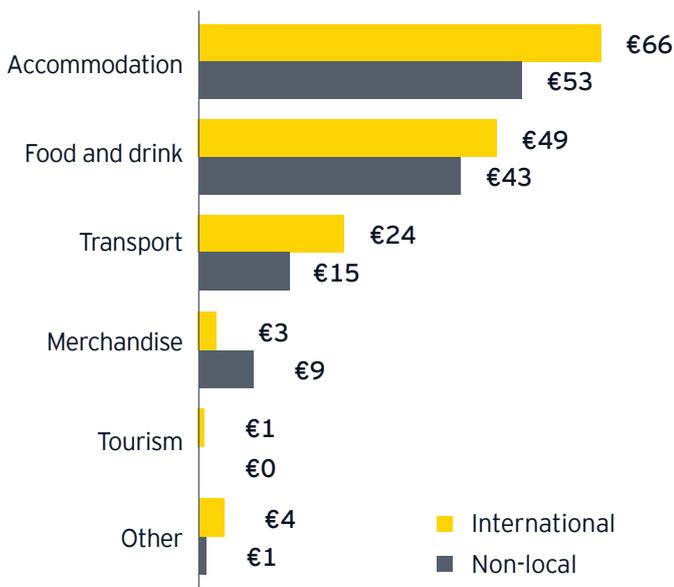
Drivers of economic impact

Visiting international spectators were the main driver of the economic impacts of the UCI Cyclo-cross World Championships in Bogense. In total, attendance was recorded at 15,000 for the two-day event, made up of 10,100 unique attendees.

Over half (5,200) of the unique spectators were international visitors. Over the course of their stay, these international visitors contributed €2.3mn in direct spending into the region, particularly through spend on accommodation and transport, while non-local attendees contributed over €400,000 to the region.

The total GVA impact on the Bogense region resulting from this expenditure was €3.6mn, equivalent to 85 jobs.

Visitor spending per night, by category



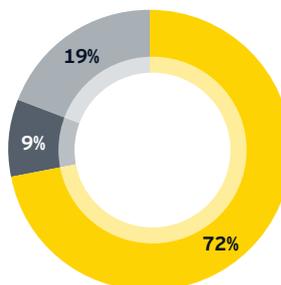
Source: EY analysis

What made Bogense unique?

The event in Bogense drew in a large proportion of international visitors, making up 52% of total attendees. The majority of the international visitors came from within Europe; the top four sources were European countries, Belgium, the Netherlands, Germany, and the United Kingdom.



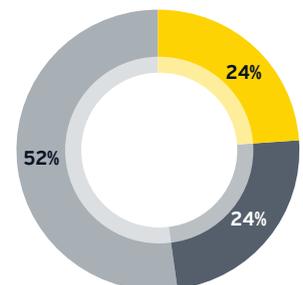
Breakdown of GVA impacts by source



- Visitor spend
- Event delivery
- Media and teams

Source: EY analysis

Origin of visitors



- Local
- International
- Non-local

Bogense saw particularly high levels of satisfaction



International visitors either satisfied or very satisfied with the event



Bogense residents either satisfied or very satisfied with the event

Source: UCI, EY analysis

Satisfaction seen with the Bogense event was high for all groups of attendees, with 94% satisfied or very satisfied with their experience at the event.

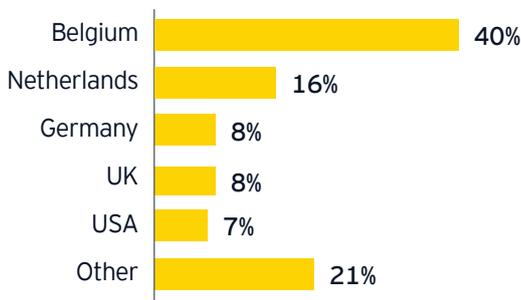
This is a similar profile to the UCI World Championships held across disciplines in Norway (Bergen), the Netherlands (Apeldoorn), and Switzerland (Lenzerheide) over past years, each of which also achieved satisfaction ratings in the mid-nineties and extremely low levels of dissatisfaction, generally of 1% or less.

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	3.0	148
Non-local visitors	1.5	122

Figures in table may not reconcile with chart due to rounding

Origin of international visitors by country (%)



Source: EY analysis

Online engagement with the UCI Cyclo-cross World Championship was also successful, as social media coverage reached wider audiences.

Instagram

- ▶ 1.2mn impressions
- ▶ 3,400 new followers

Twitter

- ▶ 1.8mn twitter impressions
- ▶ 321,000 video views

Facebook

- ▶ 1.3mn video views
- ▶ 621,000 total reach

The UCI Cyclo-cross World Championships were broadcast in **76** countries, with a cumulative audience of **51mn**.



05

Val di Sole (ITA)

Mercedes-Benz UCI
Mountain Bike World Cup



The two-day event brought **6,000 visitors** into Val di Sole, generating **€2.3mn** for the regional economy

UCI Mountain Bike World Championships presented by Mercedes-Benz and Mercedes-Benz UCI Mountain Bike World Cup

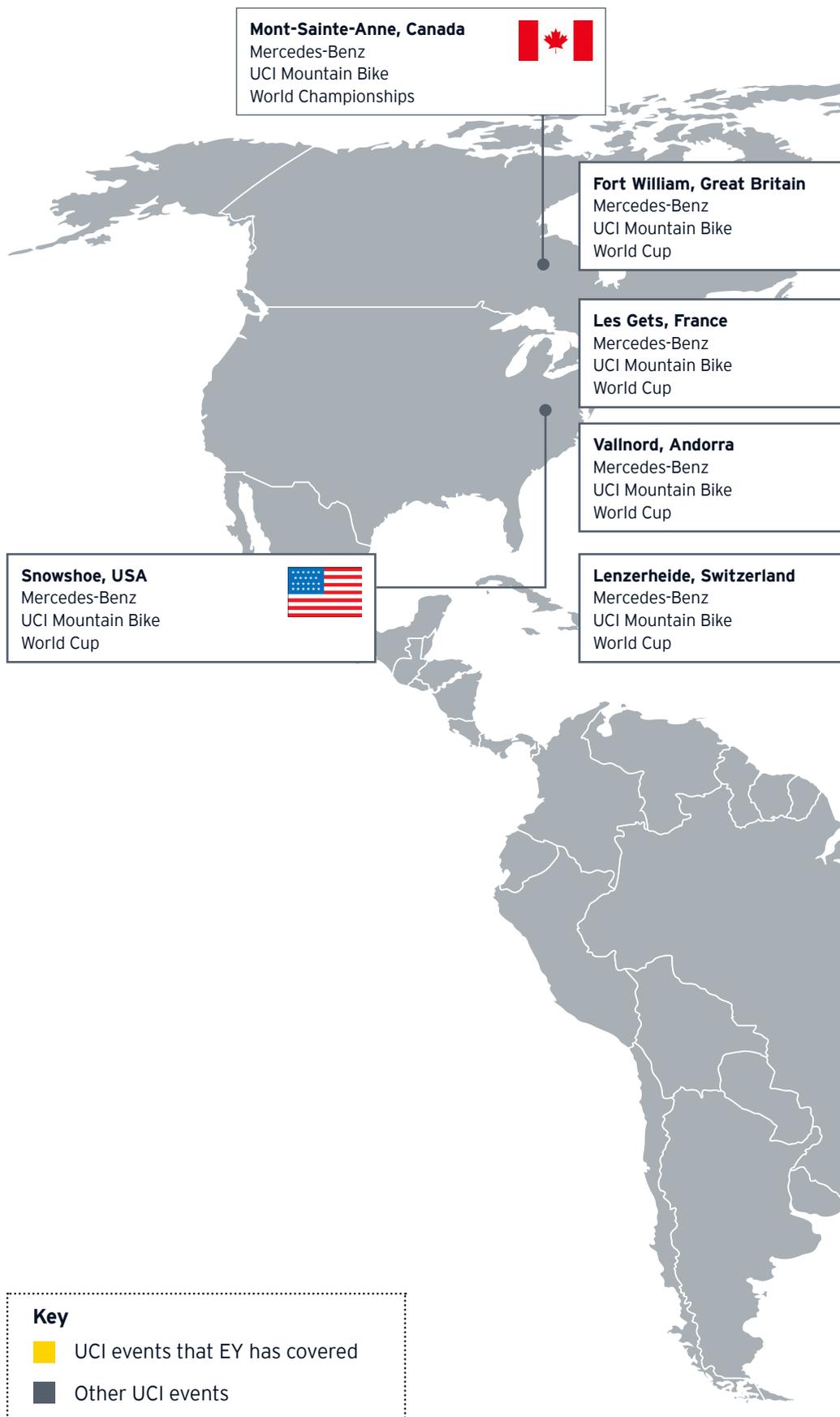
Each year, the world's best mountain bike cyclists represent their nations in cross country and downhill events at UCI Mountain Bike World Cup events. Since the inaugural event in 1990 in the USA, the event has been held in 16 different countries.

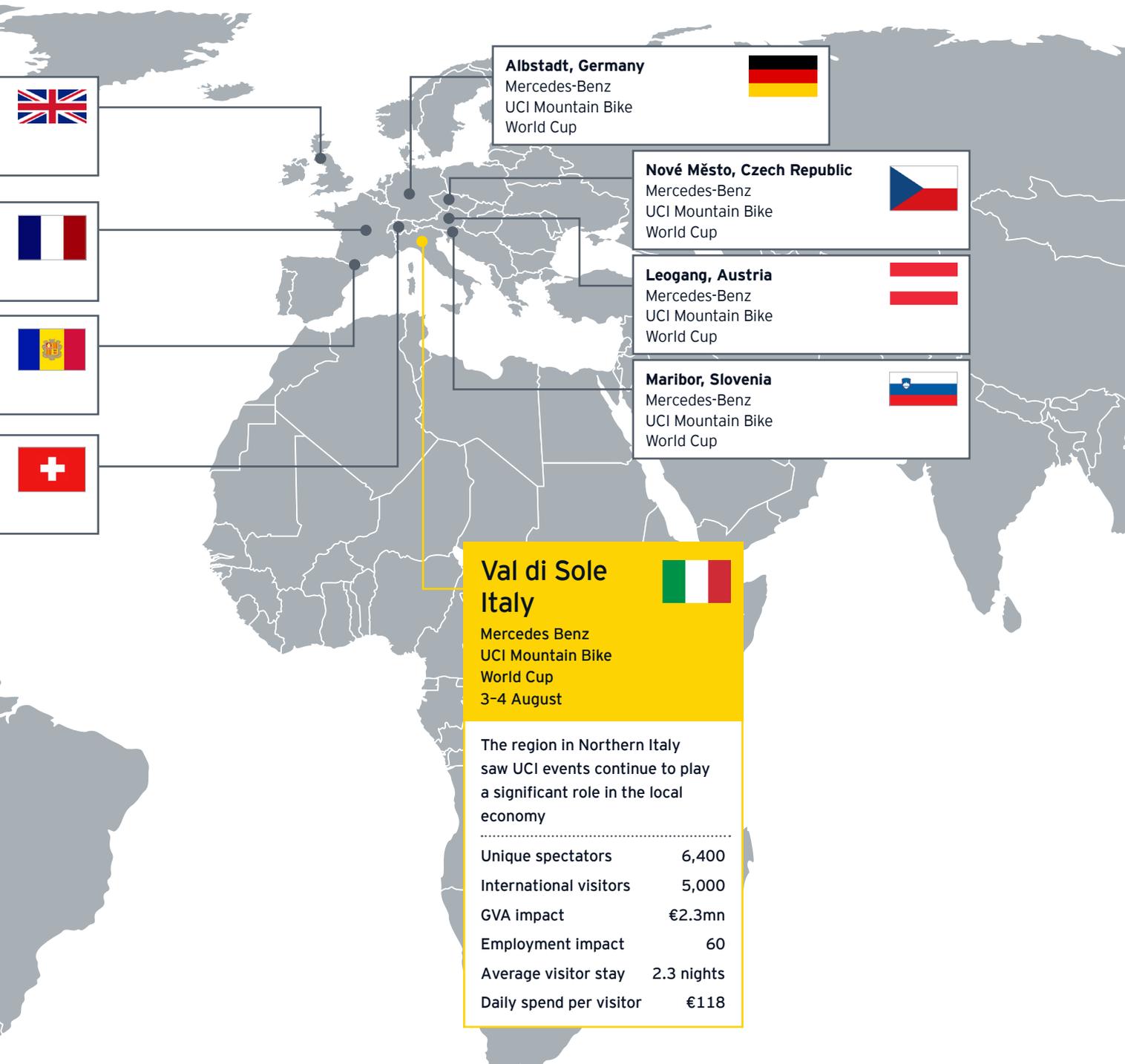
Val di Sole was home to one of the UCI World Cup races for 2019, having twice hosted the UCI Mountain Bike World Championships in 2008 and 2016.

Riders from 42 nations travelled to Val di Sole to compete in the UCI Mountain Bike World Cup, bringing 1,239 team members. The single largest contingent of riders came from France, with 95 competitors followed by Switzerland with 68, while eight national teams were represented by a single competitor.

The UCI Mountain Bike World Cup event in Val di Sole was one of seven downhill and eight cross country events taking place in 2019, in addition to the annual UCI Mountain Bike World Championships presented by Mercedes-Benz taking place in Canada.

The series of events provides professional cyclists with the opportunity to compete for points throughout the season, which then determine each rider's ranking within each discipline. In 2019, Mercedes-Benz UCI Mountain Bike World Cup events were held in 10 different locations across Europe and North America with venues hosting one or both of the downhill and cross-country events.





Albstadt, Germany
 Mercedes-Benz
 UCI Mountain Bike
 World Cup



Nové Město, Czech Republic
 Mercedes-Benz
 UCI Mountain Bike
 World Cup



Leogang, Austria
 Mercedes-Benz
 UCI Mountain Bike
 World Cup



Maribor, Slovenia
 Mercedes-Benz
 UCI Mountain Bike
 World Cup



**Val di Sole
 Italy**
 Mercedes Benz
 UCI Mountain Bike
 World Cup
 3-4 August



The region in Northern Italy saw UCI events continue to play a significant role in the local economy

Unique spectators	6,400
International visitors	5,000
GVA impact	€2.3mn
Employment impact	60
Average visitor stay	2.3 nights
Daily spend per visitor	€118

Val di Sole and the surrounding region

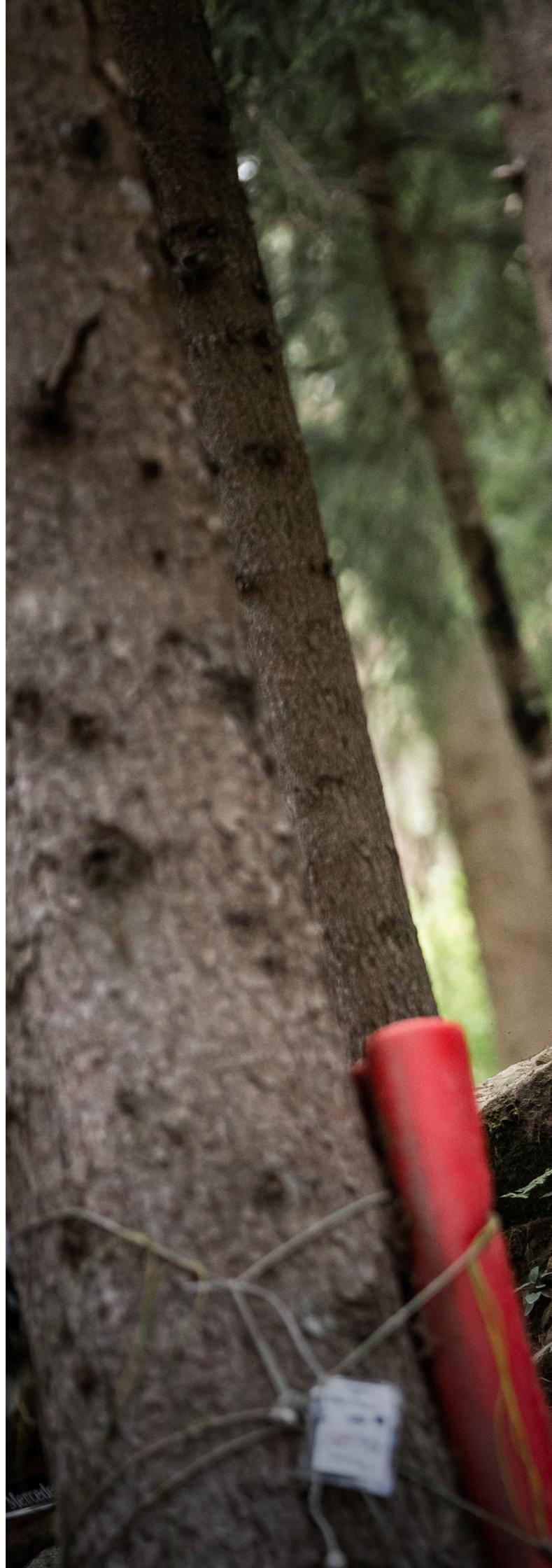
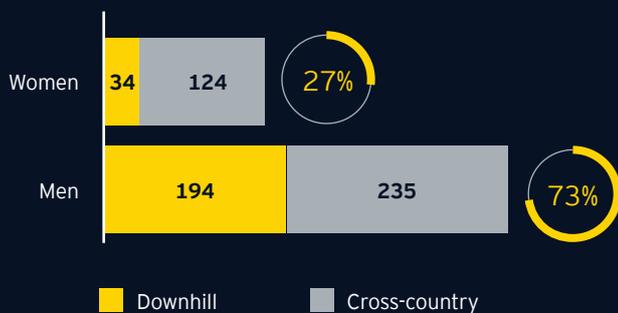
Val di Sole is a valley in the Trentino region of Northern Italy. It is an area well known for its mountain biking trails, with a variety of downhill and cross country courses that make it a suitable venue for UCI World Cup and UCI World Championship events.



UCI Mountain Bike World Cup events:

- ▶ Cross-country – Men's and Women's Elite and Under 23s
- ▶ Downhill – Men's and Women's Elite and Junior

Participation by gender





Drivers of economic impact

Total attendance across all days of the UCI Mountain Bike World Cup in Val di Sole reached 9,000, with 6,400 unique attendees at the event. 78% of these attendees (5,000) travelled from outside of Val di Sole and Trentino. In addition, 180 visiting media staff and 1,239 team members were present throughout the event, supporting a substantial boost to the regional economy.

In total, €2.3mn of economic activity was supported in Val di Sole and the wider Trentino region, equivalent to supporting 60 jobs.

Visitors and their spending contributed to 46% of the economic impact. The remaining impact was supported by the spend of media and teams (34%) and the operational expenditure required to deliver the event (20%).

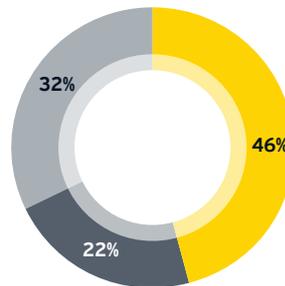
What made Val di Sole unique?

Event engagement levels were very high, with 100% of attendees being satisfied or very satisfied with the event. 88% of international visitors to Val di Sole also viewed it as somewhere they were either likely or very likely to return to in future as a result of their visit for the event.

The UCI Mountain Bike World Cup event attracted a large proportion of attendees (86%) from outside of Val de Sole. Visitors from elsewhere in Italy contributed €860k of the €1.1mn total visitor spend through their demand for accommodation and other goods and services. The longer duration of international visitor stays, at three nights on average, also provided a boost to the local economy.



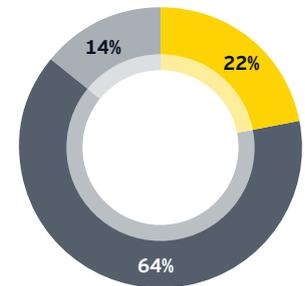
Breakdown of GVA impacts by source



- Visitor spend
- Event delivery
- Media and teams

Source: EY analysis

Origin of visitors to the UCI Mountain Bike World Cup event in Vale di Sole



- Local
- International
- Non-local

Source: EY analysis

190

media staff covered the event

€80k

total visiting media spend

1,239

members of competing teams

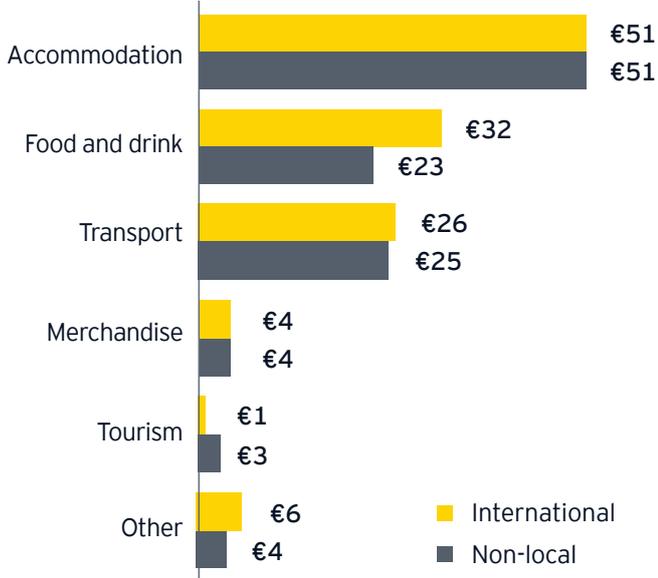
€640k

total visiting team spend

Source: EY analysis

The average visitor spend per person per night indicates that the hospitality industry was a key beneficiary from the UCI Mountain Bike World Cup event.

Average visitor spend per person per night, by category (€)

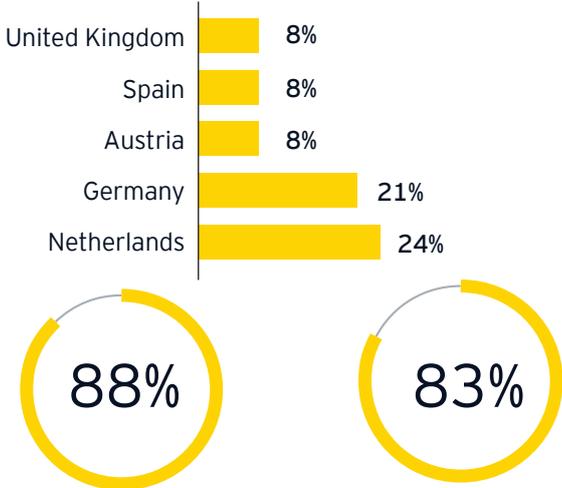


Average number of nights stayed by visitor origin

Origin	Length of stay (nights)	Daily spending per person (€)
International	3.0	110
Non-local	2.1	120

Figures in table may not reconcile with chart due to rounding

Origin of international visitors by country (%)



International visitors that are 'likely' or 'very likely' to return to the region for a holiday

Non-local visitors that are 'likely' or 'very likely' to return to the region for a holiday

Source: EY analysis

EY surveys suggest that there was a relatively large proportion of visitors to the event who would have been in Val di Sole in any case, as it is a popular area with tourists. The expenditure of these visitors is not additional as a result of the event, and is therefore not included in the economic impact calculations.

Online engagement with the UCI Mountain Bike World Cup event was also successful, as social media coverage reached wider audiences across all key channels.

Instagram

- ▶ 24k unique accounts reached
- ▶ 1,250 new followers

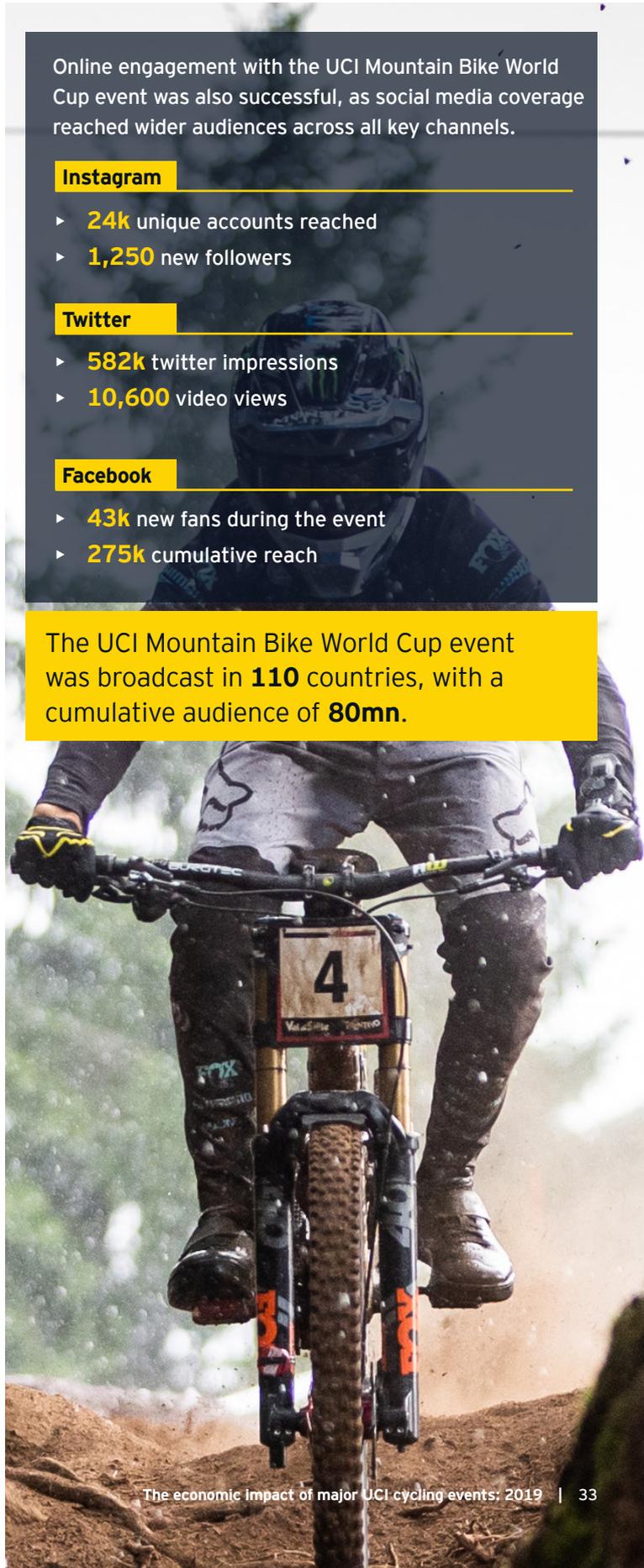
Twitter

- ▶ 582k twitter impressions
- ▶ 10,600 video views

Facebook

- ▶ 43k new fans during the event
- ▶ 275k cumulative reach

The UCI Mountain Bike World Cup event was broadcast in **110** countries, with a cumulative audience of **80mn**.



06

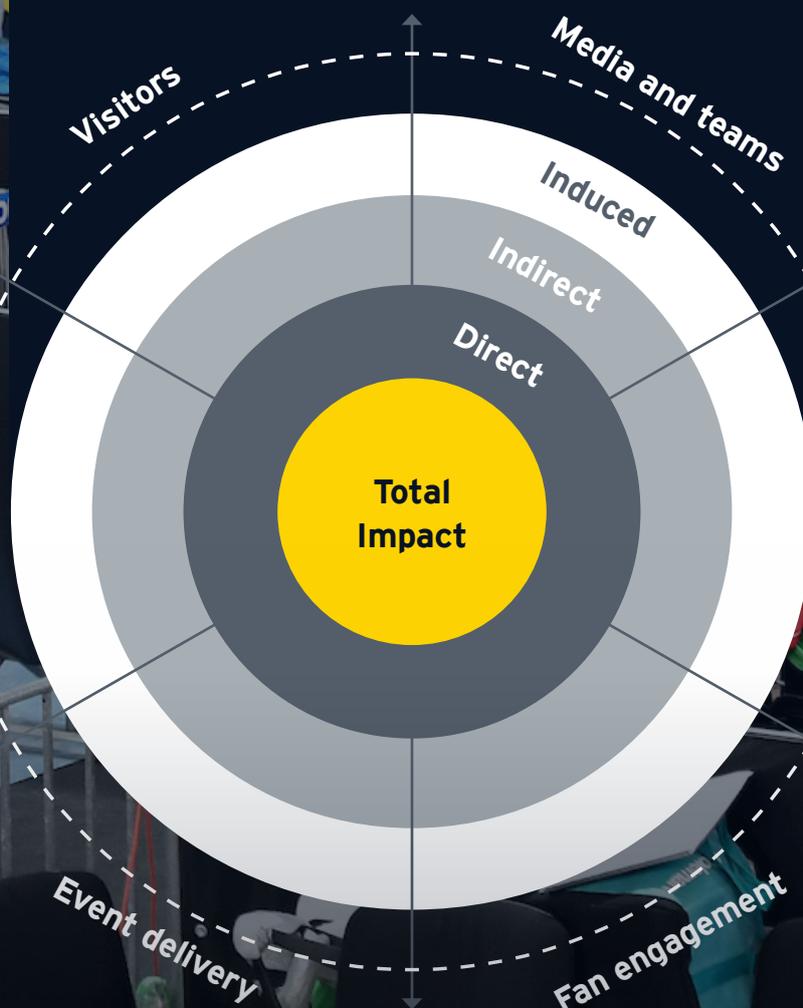
Methodology

Impact measurement methodology

The economic impacts are broken down into three categories:

- ▶ Visitor spending
- ▶ Media and teams
- ▶ Event delivery

Within each of these categories, direct, indirect and induced impacts have been estimated, while event engagement is based on attendee and visitor feedback.



Direct spending in the host city and region

The direct impacts for both visitor spending and media and teams are informed by primary research into visitor, media and team profiles and spending patterns, combined with secondary sources on attendance and accreditations. The impact studies focus only on the impacts of spending that is judged to be additional to the host locality. In particular:

- ▶ Visitor impacts (non-local and international residents) include only the spending of visitors who identify the event as the main purpose of their visit
- ▶ Media and teams' impacts exclude the spending of local media professionals
- ▶ Event delivery impacts include only the costs incurred in the host locality
- ▶ Government-funded spending in the region is excluded from the impact analysis, since this spending may have occurred at another time in the absence of the event

Sources

Primary research methodology

Extensive primary research was conducted to build up an understanding of the economic activity supported by each UCI event, including the spending patterns of visitors and the activities undertaken during their stay. This involved conducting survey interviews of three groups of people during the course of each UCI event:

- ▶ Spectators
- ▶ Teams
- ▶ Media

Survey questions covered areas such as:

- ▶ Origin of respondent
- ▶ Size of their party
- ▶ Length of stay in the host locality
- ▶ Experience of event
- ▶ Activities undertaken

The results of spectator surveys were weighted according to the estimated origins of the total spectator population. Depending on the event, this information was obtained through ticket purchaser information, a larger sample origination survey, and secondary information held by the UCI or the event organisers. For media and teams, appropriate survey weightings were based on official accreditation information.



Secondary research

Additional information from the following sources was also used to inform the impact assessments:

UCI

- ▶ Official accreditation information, to calculate direct spending in the host city and region
- ▶ Information related to broadcasting and social media activity associated with the events, to understand the wider reach

Local organising committees

- ▶ Attendance/ticketing statistics, to calculate direct spending in the host city and region
- ▶ The investment and operational costs to host the events, and the sources of funding

Organisation for Economic Cooperation and Development

- ▶ National and regional economic accounts were used to understand the links between the event and the wider host economies for the purposes of calculating direct, indirect and induced impacts

Direct economic impacts

Once the direct spending impacts in the host locality have been estimated, they are categorised according to their specific sector of the economy. This allows spending figures to be translated into sector-by-sector estimates of direct impacts on employment and Gross Value Added (GVA). These estimates are based on the ratios of GVA and employment to output by sector, taken from local economic accounts.

Indirect and induced impacts

Indirect and induced impacts are calculated using EY's economic impact model, which estimates the GVA and employment 'effects' driven by direct sector spending. These effects show the additional impact on the host locality's economy for each €1 of spending resulting from the event. The effects are driven by the structure of the local economy, including the extent to which the local economy relies upon imports from abroad and from elsewhere in the host country.

This follows the input-output framework pioneered by Wassily Leontief, and is based on national and local economic accounts.

Further considerations

The approach taken to economic impact measurement is effective in understanding the key drivers behind the economic impact of each event. This includes accounting for impacts which may occur without the events having taken place.

A number of factors could not be fully captured within the approach to this study given the information available, in particular:

Consumer welfare

Where there is a positive difference between the amount that a consumer is willing to pay for a good or service and the amount actually paid, this results in a positive impact on consumer welfare. An indication of this potentially positive impact could be captured through the surveys of spectators attitudes, though this does not necessarily capture the views of all local residents.

Social benefits

Impacts resulting from increased physical activity and general wellbeing that may derive from increased sports participation supported by the events are not quantified as part of this study, though there is evidence that major events can drive such impacts.

Economic and social costs

Disruption, such as to the transport network, which may in turn result in reduced economic activity, is not explicitly captured within this study. However, is it likely that the majority of economic activity that is disrupted over the course of the events will be displaced to periods prior or following the events, while the approach to additionality aims to include only impacts that are net additions to the region. Analysis of environmental costs and benefits was outside the scope of the study.

Additionality

As far as possible, this study seeks to include only those economic impacts which are additional to the host regions. As a result, only the impacts of expenditure from outside of the host regions are included within the overall impact. To the extent that the events have actively discouraged visitors into the host region, this may reduce the impacts from those stated within this report.

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