



Union Cycliste Internationale

Events economic impact report

Annual review of 2020



Building a better
working world



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01

Executive summary



In 2020¹, UCI World Championships and UCI World Cup events were staged in **20 countries**

UCI events bring millions of people together each year to celebrate the sporting achievements of both elite and amateur athletes from across the globe.

The COVID-19 pandemic had a substantial impact on the 2020 event calendar, resulting in some events being cancelled, postponed, or taking place behind closed doors. Despite this, the majority of UCI events were able to go ahead, engaging with global audiences and driving impact.

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

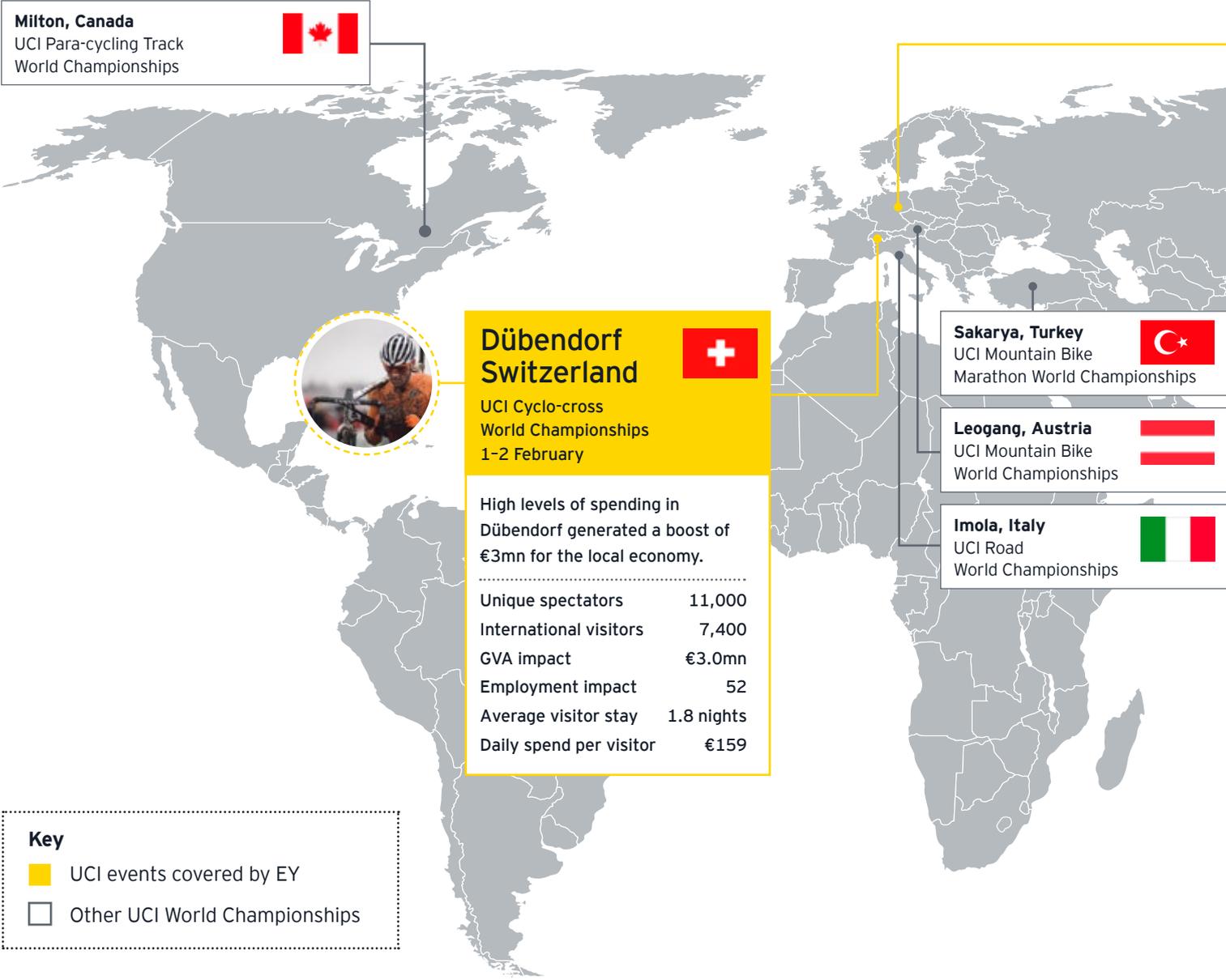
The economic impacts of these events are only one part of the total impact they may generate. Cycling events drive a broad range of impacts beyond economic benefits.

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.

¹ 2020, in this context, refers to the season which finished in the calendar year 2020. For some disciplines, this season began in the calendar year 2019.

Selected UCI events from 2020

The map shows the 2020 UCI World Championships. The two events highlighted have been assessed by EY.



Berlin Germany



UCI Track Cycling World
Championships
26 February–1 March

Berlin delivered high attendee satisfaction and a €2.7mn boost to the local economy.

Unique spectators	5,500
International visitors	3,600
GVA impact	€2.7mn
Employment impact	101
Average visitor stay	4.0 nights
Daily spend per visitor	€96



38
total UCI
events hosted

Over **4,000**
people competed in UCI
World Cups and UCI World
Championships

Representatives of
82
nations took part in
UCI events

€5.7mn
economic impact
generated by two UCI
World Championships alone

This report explores the economic impact of UCI World Championship events in 2020. The findings summarised within this report are based on research conducted by EY on behalf of the UCI throughout 2020.²

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.

² This report focuses on two UCI World Championship events in Europe, both of which took place prior to the COVID-19 pandemic impacting the region. The economic impacts of events after this have not been assessed. Therefore, the €5.7mn of impact generated by events assessed is below figures seen in previous reports, in which a more comprehensive view of UCI World Championships was presented.



02

Dübendorf

UCI Cyclo-cross
World Championships



Over **11,000 unique spectators** attended the championships in Switzerland, contributing **€3mn** to the local economy

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

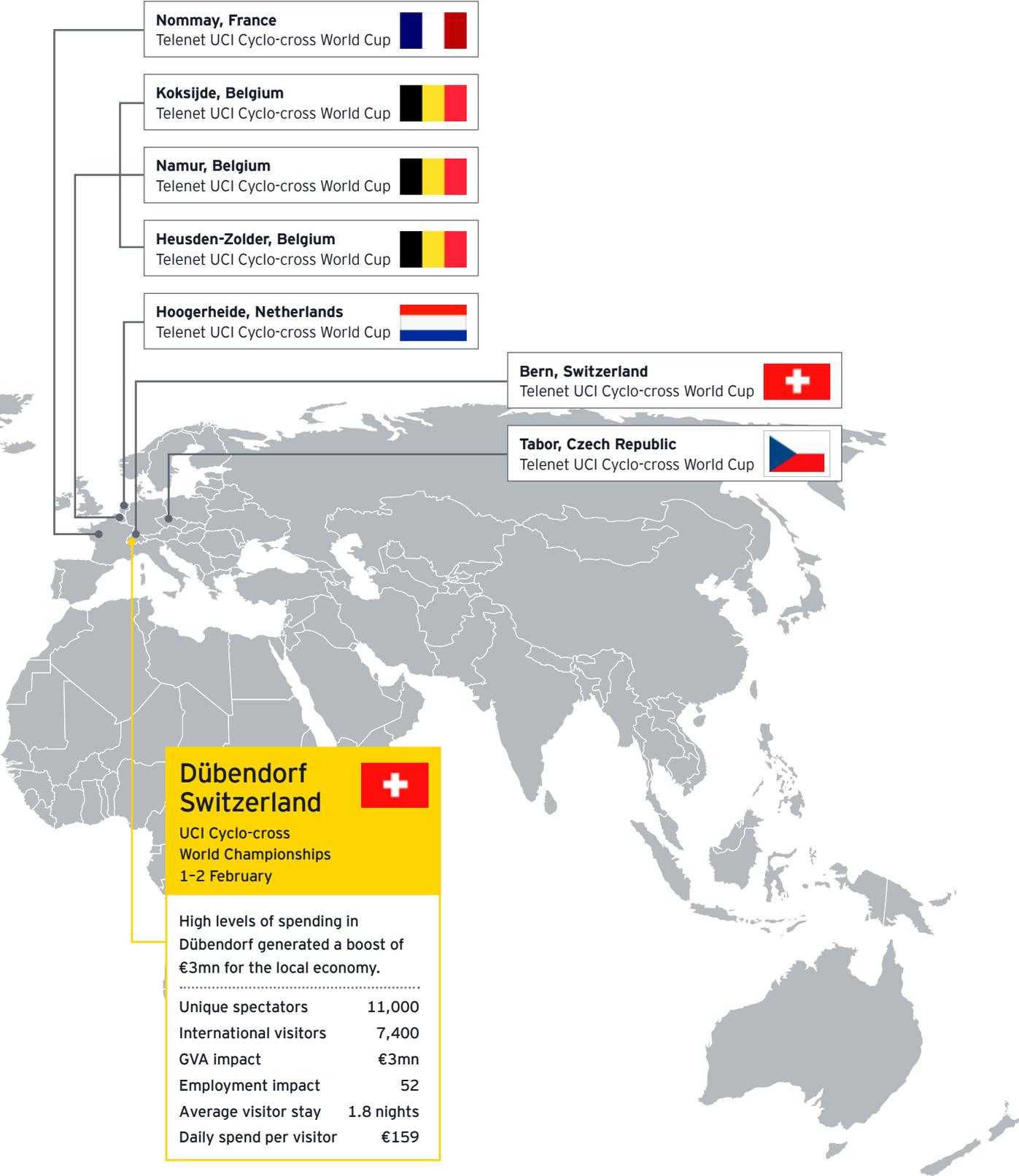
The 2020 UCI Cyclo-cross World Championships brought this major event to Switzerland for the first time in 25 years. Thousands of visitors travelled to Dübendorf in the canton of Zürich, alongside competitors from 24 nations, media and officials, while showcasing both Dübendorf and Zürich to an international audience.

Switzerland has played host to the UCI Cyclo-cross World Cup a total of eight times since 1952, most recently in 1995, in Eschenbach.

Riders from 24 nations travelled to Dübendorf to compete in the UCI Cyclo-cross World Championships, with 268 riders in total. The single largest contingent of riders came from the Netherlands, with 31 competitors, followed by Belgium with 27, while only three nations were represented by a single competitor.

In addition to the UCI Cyclo-Cross Cycling World Championships, the Telenet UCI Cyclo-cross World Cup also takes place each year. This series of competitions provides professional cyclists with the opportunity to compete for points throughout the season, which then determine each rider's ranking within each discipline. During the 2019/20 season, Telenet UCI Cyclo-cross World Cup events were held in Belgium, the Czech Republic, France, the Netherlands, Switzerland, and the United States, with the season culminating with the UCI Cyclo-cross World Championships.





Nommay, France
Telenet UCI Cyclo-cross World Cup



Koksijde, Belgium
Telenet UCI Cyclo-cross World Cup



Namur, Belgium
Telenet UCI Cyclo-cross World Cup



Heusden-Zolder, Belgium
Telenet UCI Cyclo-cross World Cup



Hoogerheide, Netherlands
Telenet UCI Cyclo-cross World Cup



Bern, Switzerland
Telenet UCI Cyclo-cross World Cup



Tabor, Czech Republic
Telenet UCI Cyclo-cross World Cup



**Dübendorf
Switzerland**



UCI Cyclo-cross
World Championships
1-2 February

High levels of spending in
Dübendorf generated a boost of
€3mn for the local economy.

Unique spectators	11,000
International visitors	7,400
GVA impact	€3mn
Employment impact	52
Average visitor stay	1.8 nights
Daily spend per visitor	€159

Drivers of economic impact

Visiting international spectators were the main driver of the economic impacts of the UCI Cyclo-cross World Championships in Dübendorf. In total, attendance was recorded at 18,300 for the two-day event, made up of 11,000 unique spectators.

Two thirds (7,400) of the unique spectators travelled from outside Dübendorf. Over the course of their stay, these international visitors contributed €1.3mn in direct spending into the region, particularly through spend on accommodation and transport, while non-local attendees (domestic visitors from outside Dübendorf) contributed over €900,000 to the region.

The total GVA impact on the Dübendorf region resulting from this expenditure was €3.0mn, equivalent to 52 jobs.

Visitor spending per night, by category



Source: EY analysis

What made Dübendorf unique?

The event in Dübendorf drew in a large proportion of local and domestic attendees, with nearly two thirds from Switzerland, and one in three of the total attendees residing in the local area.

88% of local attendees were satisfied or very satisfied with the event.



€3.0mn

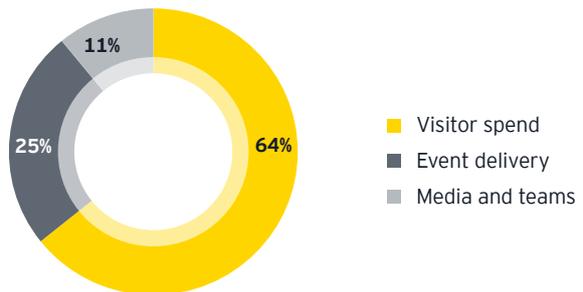
total GVA impact from the UCI Cyclo-cross World Championships

52

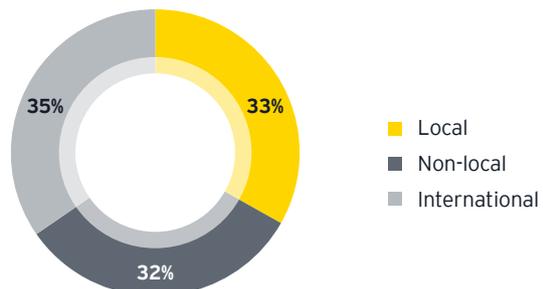
total employment impact supported by the UCI Cyclo-cross World Championships



Breakdown of GVA impacts by source



Origin of visitors



Source: EY analysis

Dübendorf saw high levels of satisfaction



International visitors either satisfied or very satisfied with the event



Dübendorf residents either satisfied or very satisfied with the event

Source: UCI, EY analysis

Satisfaction seen with the Dübendorf event was high for all groups of attendees, with 87% of all attendees satisfied or very satisfied with their experience at the event.

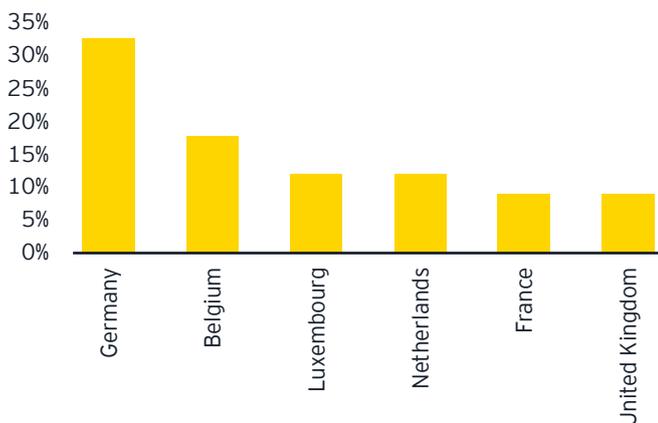
This is a similar profile to the 2019 UCI Cyclo-cross World Championships held in Bogense, Denmark.

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	2.0	153
Non-local visitors	1.7	165

Figures in table may not reconcile with chart due to rounding

Origin of international visitors by country (%)^{3,4}



Source: EY analysis

³ International visitor origin analysis indicative and based on a spectator survey sample.

⁴ Including only countries which account for 5% or more of responses

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

Instagram

- ▶ **5.6mn** impressions
- ▶ **450,000** video views

Twitter

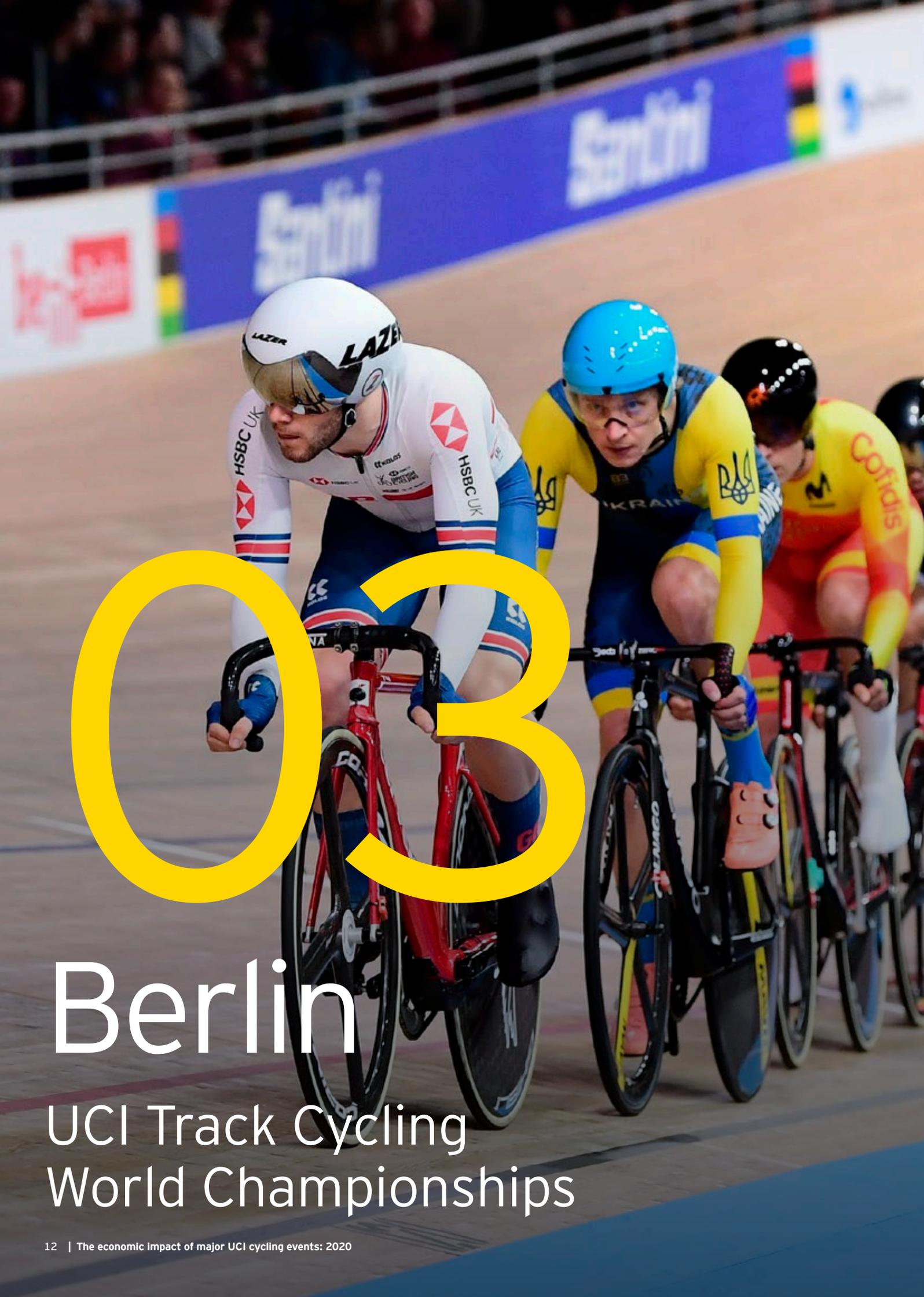
- ▶ **2.0mn** twitter impressions
- ▶ **500,000** video views

Facebook

- ▶ **8.9mn** total reach
- ▶ **3.5mn** video views

The UCI Cyclo-cross World Championships were broadcast in **111** countries, with a cumulative audience of **53mn**, which represent increases on the 2019 UCI Cyclo-cross World Championships (76 countries and 51mn).

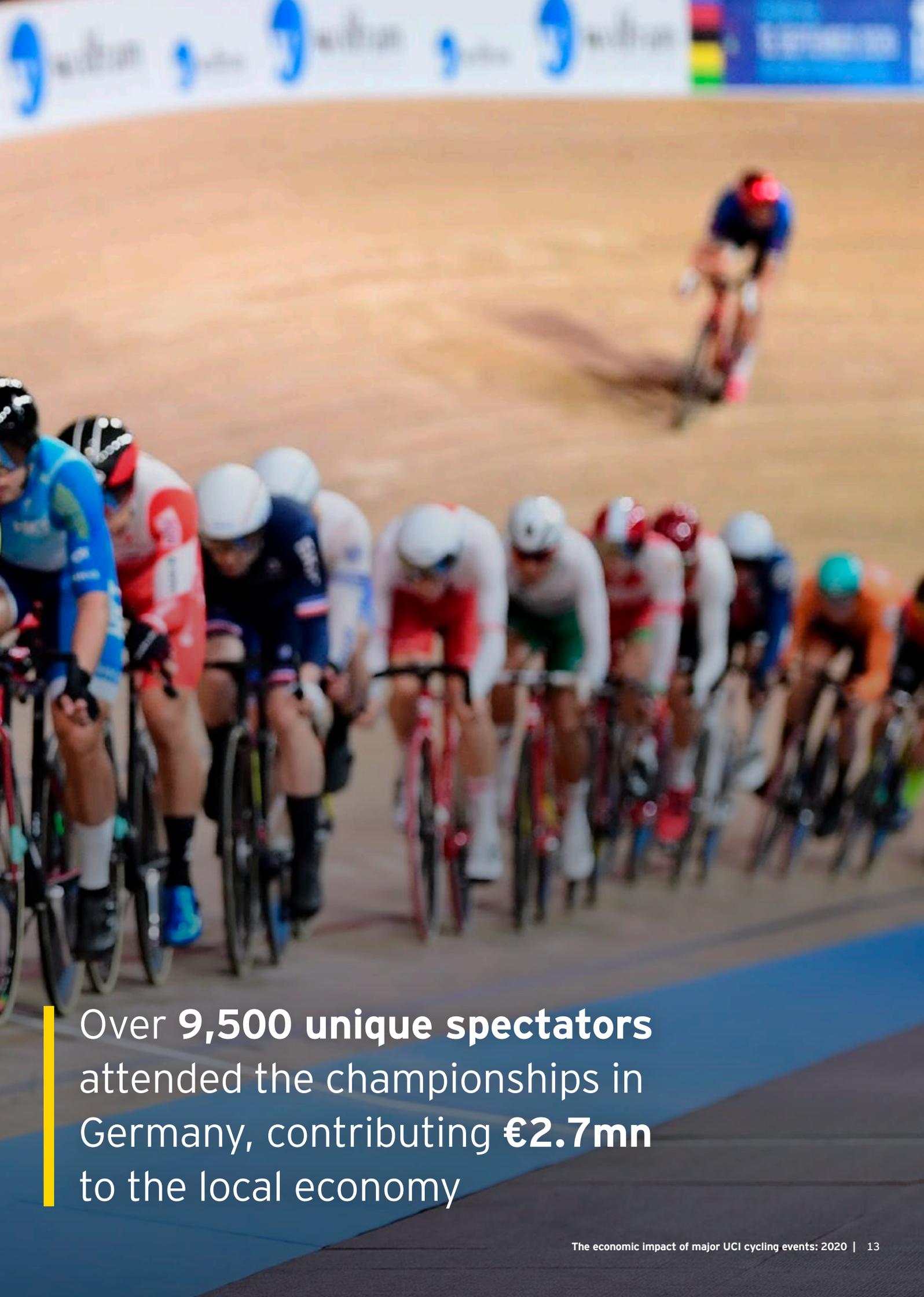




OB

Berlin

UCI Track Cycling World Championships



Over **9,500 unique spectators** attended the championships in Germany, contributing **€2.7mn** to the local economy

UCI Track Cycling World Championships presented by Tissot and Tissot UCI Track Cycling World Cup

The UCI Track Cycling World Championships is an annual event in which the world's elite cyclists compete in track-based disciplines. 2020 brought the event back to Berlin for the first time since 1999, and was the fourteenth time the event has been held in Germany – the first time being in Cologne in 1895.

In total, 45 teams travelled to Berlin to compete in the velodrome, bringing over 1,000 team members, of which 401 were competitors. The largest national contingent of riders came from Germany, with 26, while seven teams travelled with just a single rider.

In addition to the UCI Track Cycling World Championships, the Tissot UCI Track Cycling World Cup also takes place each year. This series of competitions provides professional cyclists with the opportunity to compete for points throughout the season, which then determine each rider's ranking within each discipline. During the 2019/20 season, Tissot UCI Track Cycling World Cup events were held in Australia, Belarus, Canada, Hong Kong, New Zealand, the United Kingdom, with the season culminating with the UCI Track Cycling World Championships.



Milton, Canada
Tissot UCI Track Cycling World Cup 



Key

-  UCI World Championships that EY has covered
-  Other UCI Track Cycling events

Glasgow, Great Britain
Tissot UCI Track Cycling World Cup 

Minsk, Belarus
Tissot UCI Track Cycling World Cup 

Hong Kong
Tissot UCI Track Cycling World Cup 

**Berlin
Germany** 
UCI Track Cycling World
Championships
26 February-1 March

Berlin delivered high levels of
spectator satisfaction and a
€2.7mn boost to the local economy

Attendance	20,000
International visitors	3,600
GVA impact	€2.7mn
Employment impact	101
Average visitor stay	4.0 nights
Daily spend per visitor	€96

Brisbane, Australia
Tissot UCI Track Cycling World Cup 

Cambridge, New Zealand
Tissot UCI Track Cycling World Cup 



Berlin

Berlin is the capital city of Germany and is home to 3.6mn people – around 4.5% of the total population of Germany.⁵

The city of Berlin has a rich sporting history, including hosting the Summer Olympics and the 2006 FIFA World Cup Final.



Velodrom, Berlin

The event was held within the Velodrom, an indoor track cycling and multi-use arena. Opened in 1997, the arena has a track cycling capacity of around 5,000 people.

UCI Track Cycling World Championships events:

Kerin

Madison

Omnium

Points Race

Individual Pursuit

Team Pursuit

Scratch race

Sprint

Team Sprint

Time Trial



⁵ Source: Eurostat



SHIMANO

TISSOT TISSOT TISSOT TISSOT OBwald

BEST PLACE
NEW TEAM

TISSOT
SWISS WATCHES SINCE

LAPS T

Drivers of economic impact

Over the course of the event, total attendance reached 20,000, with 9,500 unique spectators attending the event. Of these spectators, 5,500 were visitors from outside of the region.⁶

Visitor spending, which averaged €96 per visitor per night, combined with the spending of 304 media staff, 1,016 team members and the operational delivery of the Championships, drove €2.7mn of economic activity in Berlin and the region. This was equivalent to supporting 101 jobs.

The spending of media personnel and teams underpinned nearly half (49%) of the economic impact of the event. The remaining impact was supported by visitors (38%) and event delivery (13%).

What made Berlin unique?

- ▶ Substantial domestic engagement: the UCI Track Cycling World Championships attracted a large proportion (82%) of attendees from within Germany.
- ▶ High fan satisfaction: 92% of visitors said they were 'satisfied' or 'very satisfied' with the event.
- ▶ Large attendance: 9,500 unique spectators, by comparison to 5,600 at Apeldoorn in 2018, drove a greater economic impact.

304

media staff covered the event

€240k

total visiting media spend

1,016

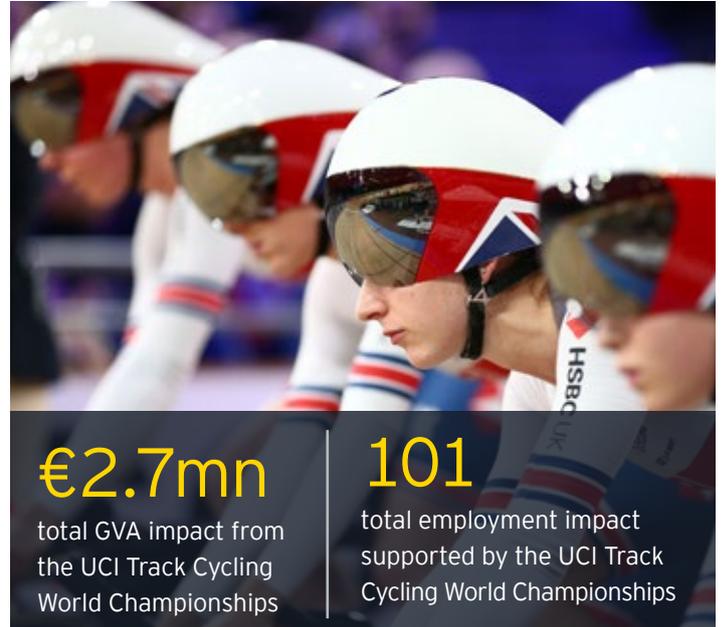
members of competing teams

€1.4mn

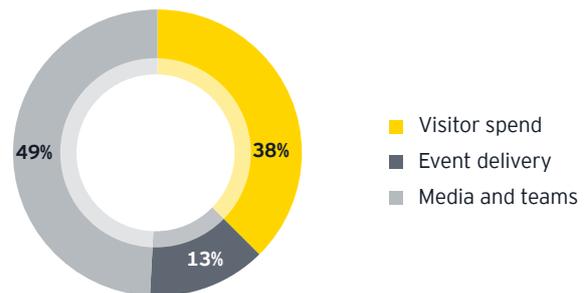
total visiting team spend

Source: EY analysis

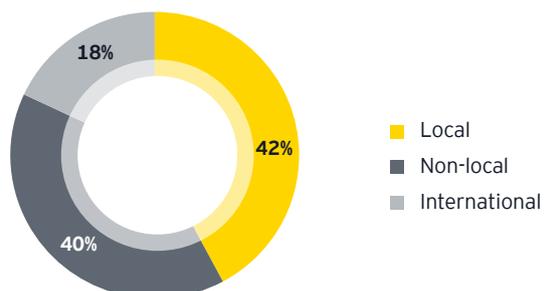
⁶ Unique visitors, rather than unique spectators, are the main driver of the economic impact. This is because unique spectator figures include residents from within Berlin, whose expenditure throughout the course of the event is not considered additional to the region.



Breakdown of GVA impacts by source



Origin of visitors UCI Track Cycling World Championships in Berlin



Source: EY analysis

Berlin saw particularly high levels of satisfaction



International visitors either satisfied or very satisfied with the event



Berlin residents either satisfied or very satisfied with the event

Source: UCI, EY analysis

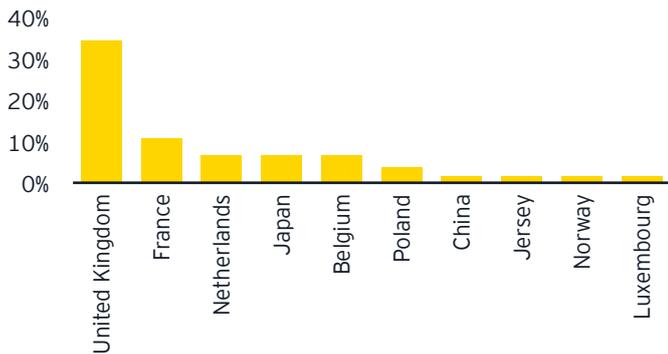
Satisfaction seen with the Berlin event was high for all groups of attendees, with 92% satisfied or very satisfied with their experience at the event.

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	4.6	97
Non-local visitors	1.8	92

Figures in table may not reconcile with chart due to rounding

Origin of international visitors by country (%) ⁷



Source: EY analysis

Online engagement with the UCI Track Cycling World Championship was also successful, as social media coverage reached wider audiences.

Instagram

- ▶ **7.4mn** impressions
- ▶ **600,000** video views

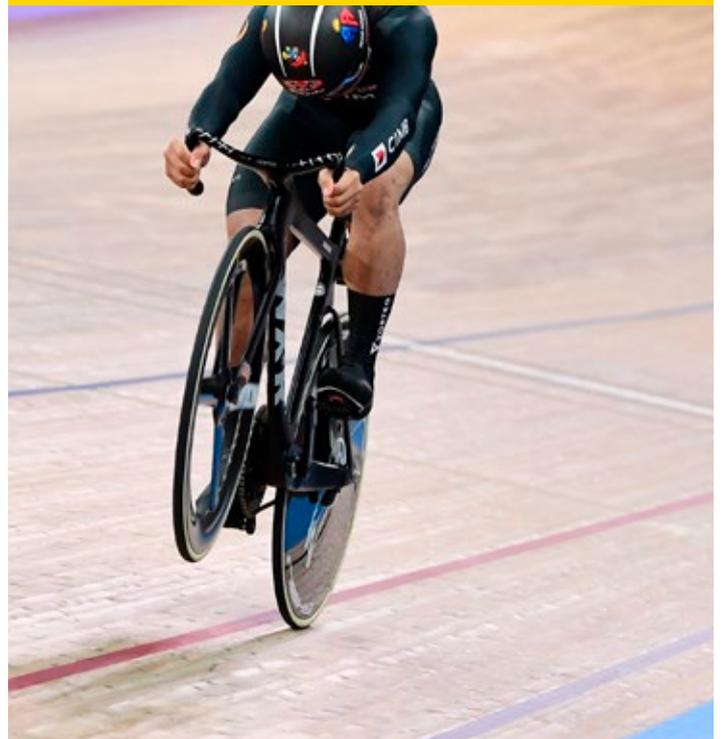
Twitter

- ▶ **3.5mn** twitter impressions
- ▶ **490,000** video views

Facebook

- ▶ **9.9mn** total reach
- ▶ **1.0mn** video views

The UCI Track Cycling World Championships were broadcast in **98** countries, with a cumulative audience of **196mn**. This was a larger audience than the 2018 UCI Cycling World Championships (170mn), albeit in fewer countries (98 in 2018).



⁷ International visitor origin analysis indicative and based on a spectator survey sample



04

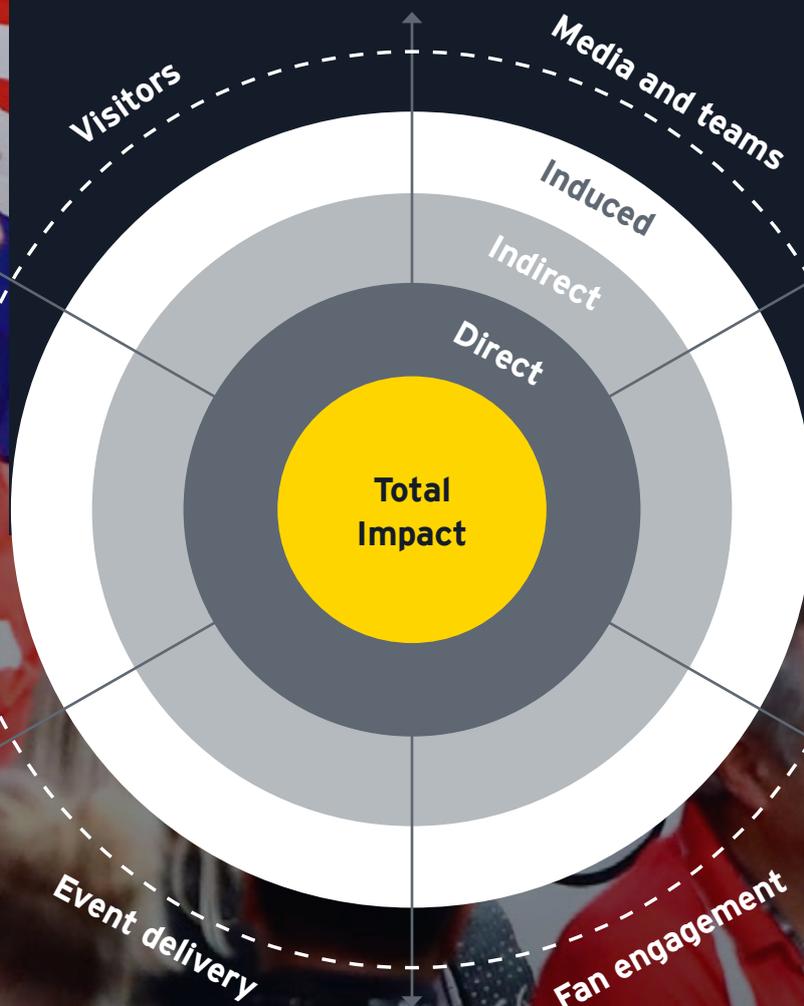
Methodology

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

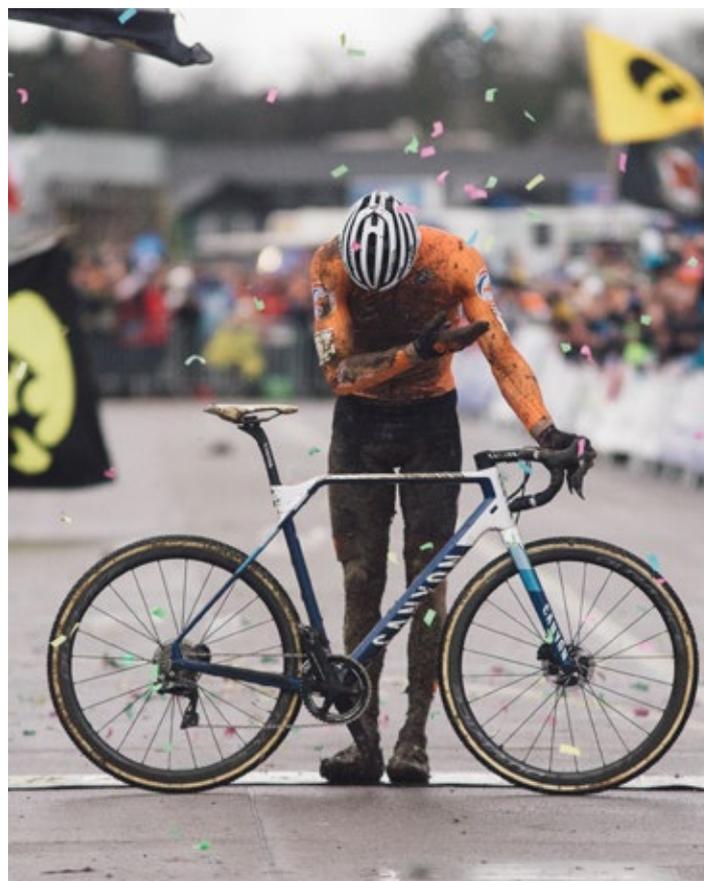
Extensive primary research was conducted to build up an understanding of the economic activity supported by each UCI event, including the spending patterns of visitors and the activities undertaken during their stay. This involved conducting survey interviews of three groups of people during the course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