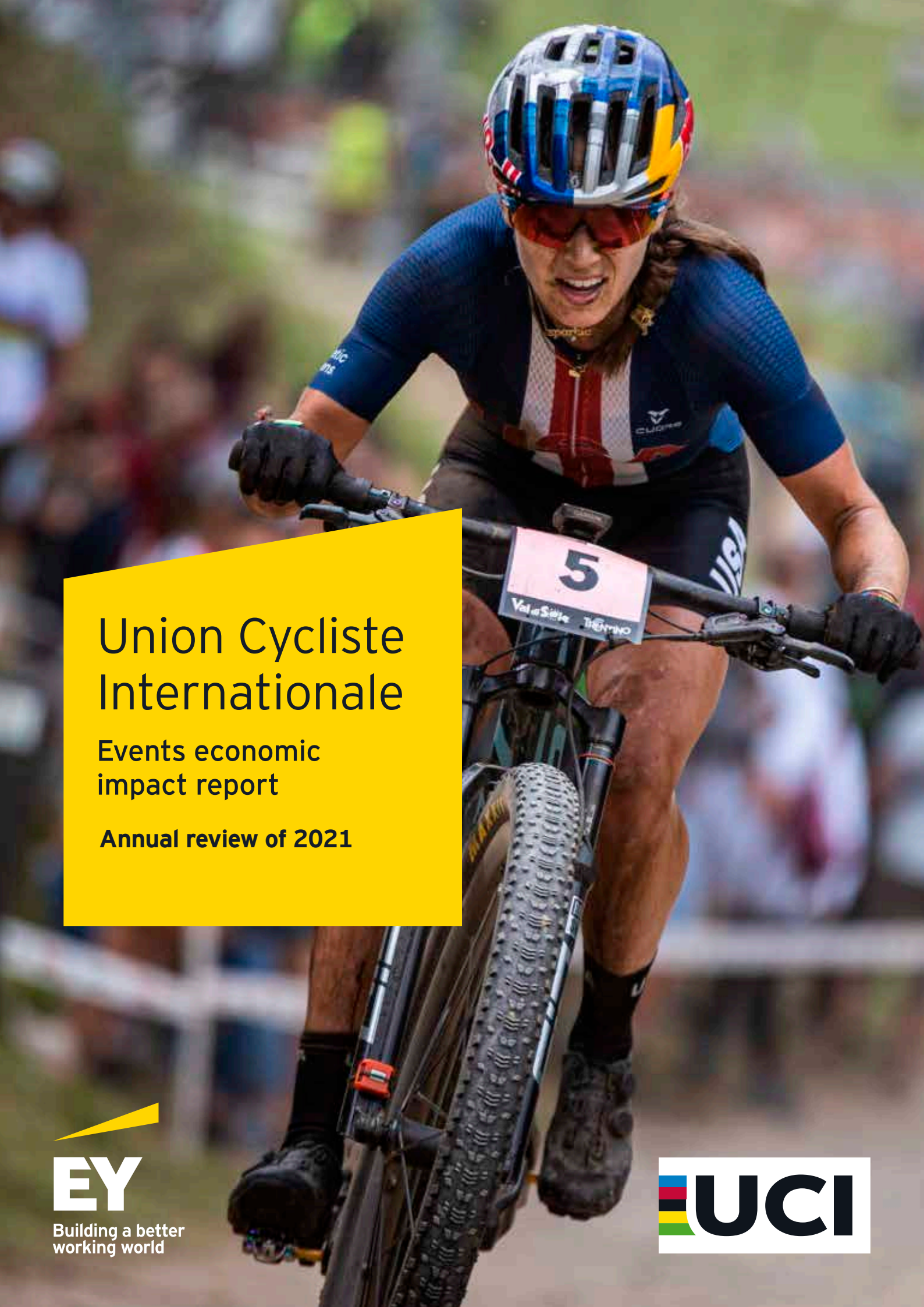

Union Cycliste Internationale

Events economic impact report

Annual review of 2021

EY
Building a better working world

UCI

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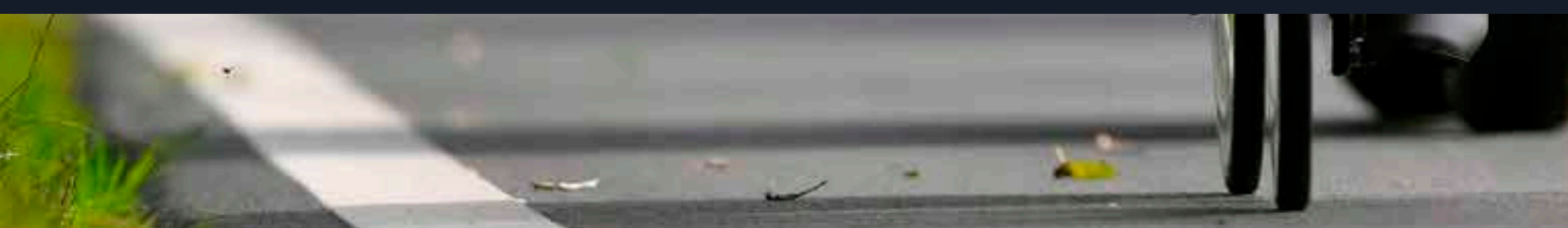


In this report

1. Executive summary 2

2. Flanders (BEL) – UCI Road World Championships 6

3. Val di Sole (ITA) – UCI Mountain Bike World Championships 12

4. Methodology 18

01

Executive summary

In 2021, UCI World Championships and UCI World Cup events were staged in **18 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.

In 2021, cycling event organisers, participants and spectators continued to grapple with the challenges of the Covid-19 pandemic. Travel restrictions, social distancing measures and public health were key considerations throughout the season influencing how and whether events could take place.

Nevertheless, a huge variety of UCI events were staged in 2021, covering all cycling disciplines and ranging from major events such as the UCI Road World Championships, to smaller events such as the UCI Indoor Cycling World Championships. This variety allowed UCI events to again reach a wide and diverse audience, with different levels of operational support and investment required 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.

Selected UCI events from 2021

The map shows the 2021 UCI World Championships. The two events highlighted have been assessed by EY.

Ostend, Belgium
UCI Cyclo-cross
World Championships

Papendal, Netherlands
UCI BMX
World Championships

Flanders Belgium

UCI Road World Championships
19-26 September

The UCI Road World Championships in Flanders attracted over 1mn spectators generating a €27.4mn boost to the local economy.

Unique spectators	1,030,000
International visitors	101,000
GVA impact	€27.4mn
Employment impact	565
Average visitor stay	4.6 nights
Daily spend per visitor	€81

Stuttgart, Germany
UCI Indoor Cycling
World Championships

Montpellier, France
UCI Urban Cycling
World Championships-BMX Freestyle

Roubaix, France
Tissot UCI Track
World Championships

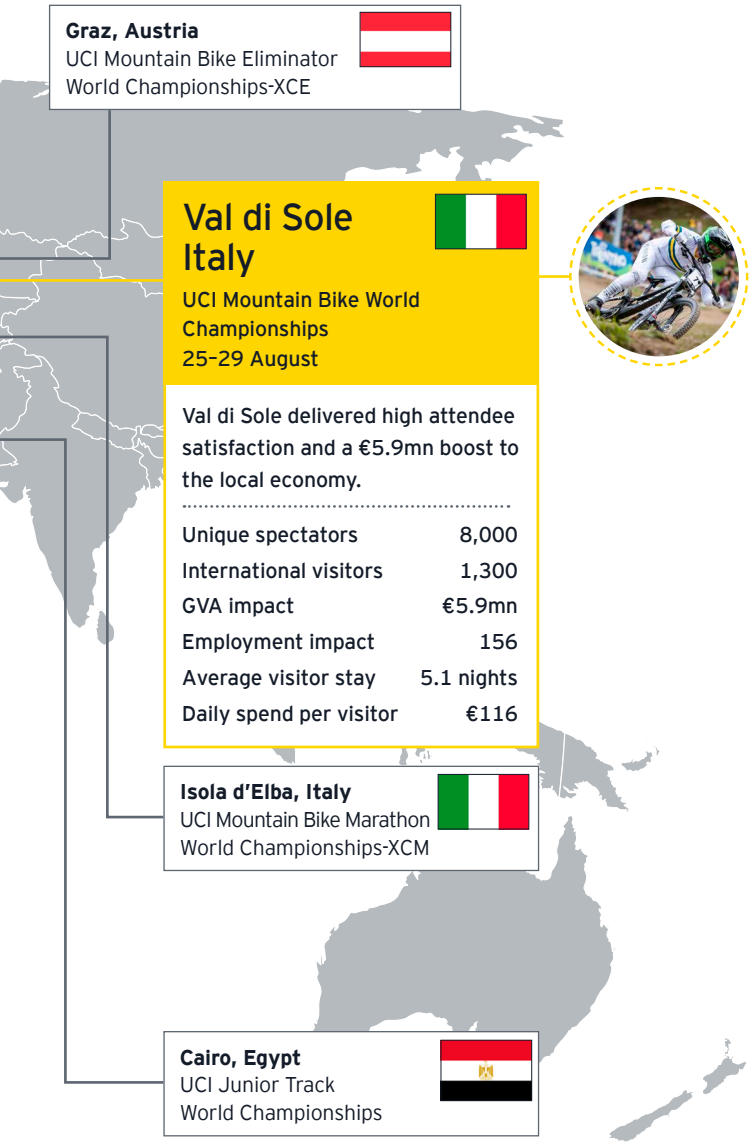
Cascais, Portugal
UCI Para-cycling Road
World Championships

Lisbon, Portugal
Redbull UCI Pump Track
World Championships

Vic, Spain
UCI Urban Cycling World
Championships-Trials

Key

- UCI events covered by EY
- Other UCI events



Graz, Austria
UCI Mountain Bike Eliminator
World Championships-XCE

Val di Sole Italy

UCI Mountain Bike World Championships
25-29 August

Val di Sole delivered high attendee satisfaction and a €5.9mn boost to the local economy.

Unique spectators	8,000
International visitors	1,300
GVA impact	€5.9mn
Employment impact	156
Average visitor stay	5.1 nights
Daily spend per visitor	€116

Isola d'Elba, Italy
UCI Mountain Bike Marathon
World Championships-XCM

Cairo, Egypt
UCI Junior Track
World Championships

71
total events hosted

4,937
people competed in UCI events

Representatives of
113
nations took part in UCI events

€33mn
economic impact generated by two events alone

This report explores the economic impact of UCI World Championships events in 2021. The findings summarised within this report are based on research conducted by EY on behalf of the UCI throughout 2021.

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

Flanders (BEL)

UCI Road World Championships

Over **1,030,000 unique spectators** attended the UCI Road World Championships in Belgium, contributing **€27.4mn** to the local economy

The UCI Road World Championships

The UCI Road World Championships brings the world's best road cyclists together each year to compete on the roads, streets and avenues of the host towns, cities and region. This brings significant challenges in terms of course management, but also provides spectacular locations for riders to compete in.

2021 brought the flagship event of world cycling to the Belgian region of Flanders for the first time since 2002. This was the 10th time that the UCI Road World Championships had been held in Belgium and the seventh time in Flanders. The event also marked 100 years since the first UCI Road World Championships were held, in Copenhagen, Denmark. The UCI Road World Championships brought thousands of visitors to Flanders, alongside competitors from 75 nations, media and officials, whilst showcasing both Flanders and Belgium to an international audience.

Competitors represented 75 nations in total, which took place between Sunday 19 and Sunday 26 September, with racing taking place across Flanders, but focused within four cities in particular: Antwerp, Bruges, Knokke-Heist and Leuven. The largest contingents of riders came from France, Italy and the Netherlands, with 47 competitors from each of these nations.

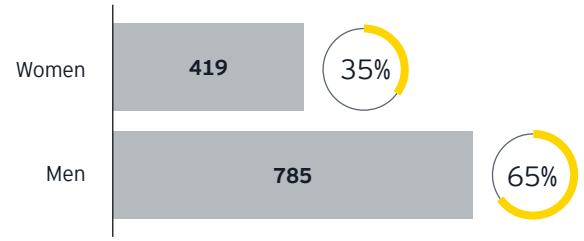
UCI Road World Championships events:

Team Time Trial Mixed Relay – mixed Men and Women

Individual Time Trial – Men and Women Elite, Men and Women Junior and Men Under 23

Road Race – Men and Women Elite, Men and Women Junior and Men Under 23

Participation by gender[1]



1 Some athletes competed in several races

Flanders in Belgium

Flanders is the most populous of Belgium's three major regions, and is home to 6.7mn people. The region is divided into five provinces over 13,600 km^2.

Flanders has a rich cycling history. It is home to the Tour of Flanders, an annual road cycling race held in Belgium each spring. Organised by Flanders Classics, the Tour of Flanders is one of the most important races in world cycling and is a part of the UCI WorldTour and UCI Women's WorldTour. Other classic Flanders cycling events include Dwars door Vlaanderen – à Travers la Flandre and Gent-Wevelgem in Flanders Fields. Flanders is also home to many cycling legends such as such as Eddy Merckx, Johan Museeuw, Tom Boonen and Yvonne Reynders.[3]

The region is committed to organising large sports events and encouraging its population to undertake sporting activities. A study showed that almost 65% of Flanders residents frequently participate in sport.[4]

Flanders has also been host to a variety of sports events, including the World Championship Gymnastics, the Artistic Gymnastics World Championships, European Championship Fencing, the Davis Cup contest between France and Belgium, the Ghent boxing gala and the 1920 Summer Olympics in Antwerp.

Host cities

Knokke-Heist

Knokke-Heist is a coastal city on the North Sea, situated in West Flanders. An accessible city located close to the Dutch border, it has several cycling routes and tourist attractions.

During the UCI Road World Championships, Knokke-Heist served as the starting point for the time trials.

Antwerp

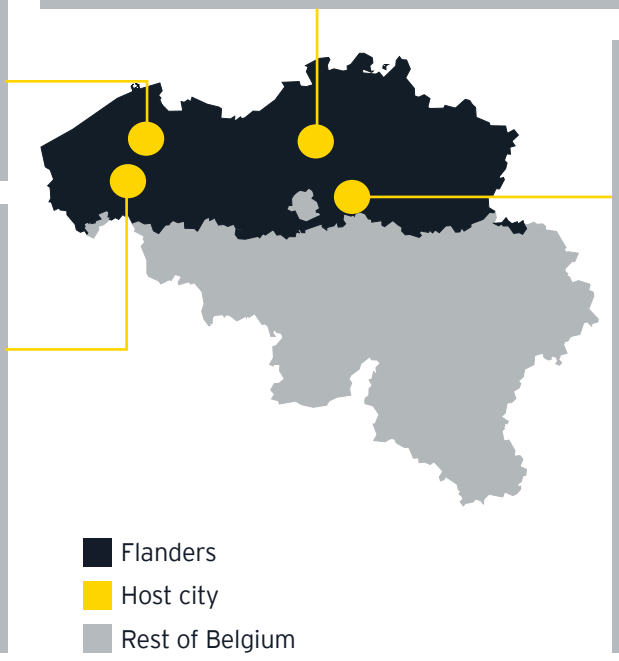
The city Antwerp is situated on the River Scheldt and is the capital of the province of the same name, within Flanders. With a population of over 500,000, it is Belgium's second-largest city after the capital, Brussels.

During the UCI Road World Championships, Antwerp served as the starting point for the for Women Elite, Men Elite and Men Under 23 road races.

Bruges

Bruges is the capital and largest city of the province of West Flanders. A popular tourism destination, its historical city centre is a World Heritage Site of UNESCO.

During the UCI Road World Championships, Bruges served as the finishing point for the time trials.



Leuven

Leuven is the capital and largest city of the province of Flemish Brabant. Leuven sits 25km east of Brussels, and is home to Belgium's largest university.

During the UCI Road World Championships, Leuven was the starting point for men and women junior road races and finishing point for the all road races, which saw it attract more visitors and spectators than any other host city.

2 Population: Size and Growth, Statistics Flanders
3 UCI Road World Championships General Information Bulletin
4 Sport Vlaanderen Gent

Drivers of economic impact

Total attendance over the course of the event was estimated to be 1,520,000 with around 1,030,000 unique spectators, 138,000 of whom travelled from outside of Flanders.[5]

These visitors, in addition to 501 media staff and 1,400 team members, contributed to significant economic activity within Flanders. An additional €27.4mn of economic activity was generated within Flanders, equivalent to supporting 565 jobs.

Visitors drove 86% of the economic impact, through spending during their stay in the region. The spend of operational delivery of the event itself underpinned 11% of the impact, whilst media and teams spending drove 3%.

What made Flanders unique?

The UCI Road World Championships in Flanders saw an unrivalled turnout from local residents, with 87% of all spectators estimated to live in the region. Large crowds gathered in the four host cities and along the routes which led the road races through towns and other cities, demonstrating their cycling passion by turning out in hundreds of thousands to cheer riders on.

Local spectators came away with positive perceptions of the event on the whole: 85% of those surveyed described themselves as either 'satisfied' or 'very satisfied'. Local residents also felt proud that the event was taking place in Flanders, particularly in Knokke-Heist, where 88% of local survey respondents 'agreed' or 'strongly agreed' that they felt proud. The UCI Road World Championships provided a boost to the mood of the local population after a difficult period.

The event also attracted a particularly large number of international visitors, at 101,000. Spending by international visitors made up the vast majority of visitor expenditure (€32mn of the total of €36mn), driving a substantial share of the economic impact generated, and providing an important economic boost to the region – in particular to the tourism and hospitality sectors.

Flanders made a positive impression on international visitors, with 89% suggesting that they would be 'likely' or 'very likely' to return for a future holiday.

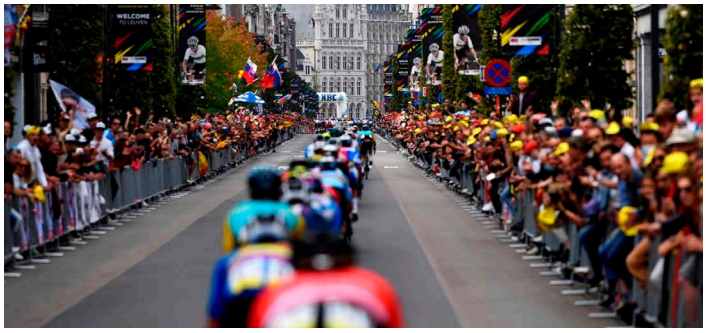
501
media staff covered the event

€250k
total visiting media spend

1,400
members of competing teams

€1.4mn
total visiting team spend

Source: EY analysis



€27.4mn
total GVA impact from the UCI Road World Championships

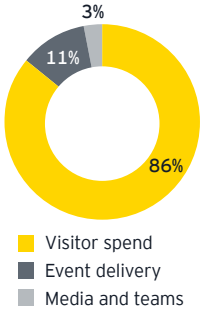
565
total employment impact supported by the UCI Road World Championships

1,520,000
total event attendance

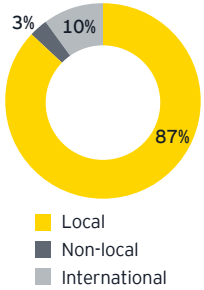
1,030,000
unique spectators

€36mn
total visitor spend

Breakdown of GVA impacts by source



Origin of spectators at the UCI Road World Championships in Flanders

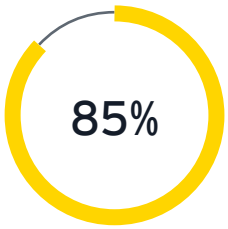


Source: EY analysis

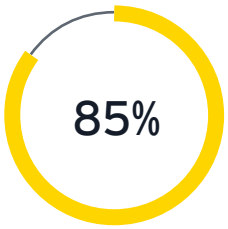
5 Unique visitors, rather than unique spectators, are the main driver of the economic impact. This is because unique spectator figures include residents from within Flanders, whose expenditure throughout the course of the event is not considered additional to the region.

Event engagement

Event engagement levels were very positive, with 85% of all attendees being 'satisfied' or 'very satisfied' with the event. Furthermore, 85% of all visitors were likely to recommend Flanders as a tourist destination to their family, friends and colleagues.



Attendees reporting being 'satisfied' or 'very satisfied' with their experience at the event

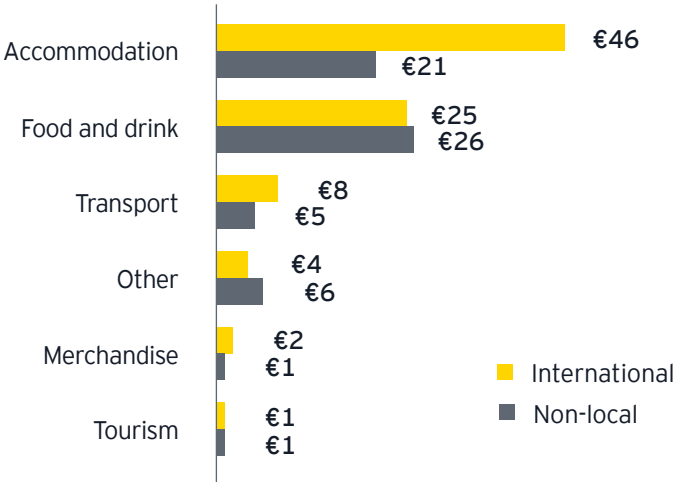


Visitors stating they were likely or very likely to recommend Flanders as a holiday destination

Source: EY analysis

Visitor spending averaged €59 per person per night for non-local attendees and €86 per person per night for international attendees. This suggests that the hospitality industry was a primary beneficiary from the UCI Road World Championships.

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



Source: EY analysis

Average number of nights stayed by tourist origin

Origin	Length of stay (nights)	Daily spending per visitor (€)
Non-local	3.4	59
International	4.9	86

Source: EY analysis

*Figures in the graph do not sum to this total due to rounding

Online engagement with the UCI Road World Championships was also successful, as social media coverage reached wider audiences with 54mn overall reach and impressions.

Facebook

Approximately **54.6mn** total reach

Over **15.4mn** video views

Twitter

Approximately **18.4mn** impressions made

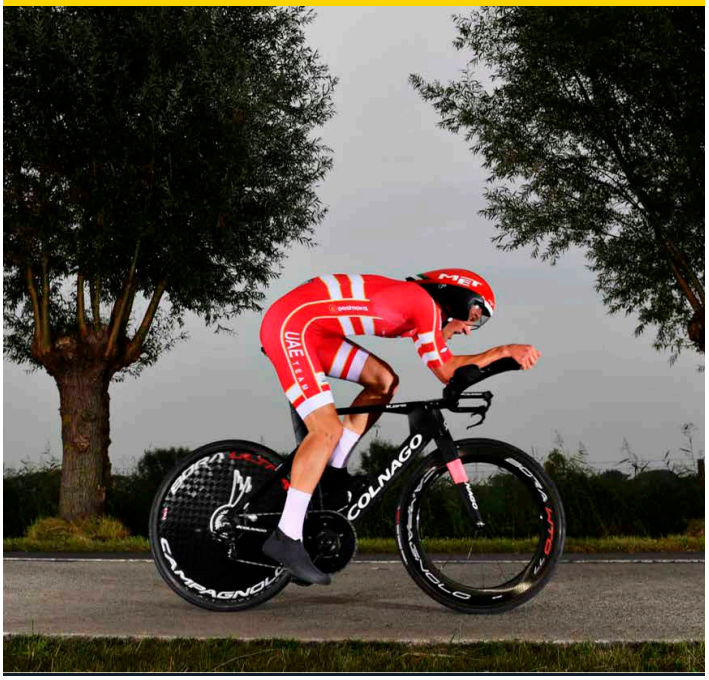
2.8mn video views

Instagram

9.1mn total reach

7.1mn video views

The UCI Road World Championships were broadcast in **113 countries**, with a cumulative audience of **208mn** and **83mn** hours viewed. This is the same number of countries broadcast in as the 2020 UCI Road World Championships, and an increase in both audience (205mn) and hours viewed (73mn).



03

Val di Sole (ITA)

UCI Mountain Bike World Championships

Over **8,000 unique spectators** attended the UCI Mountain Bike World Championships in Italy, contributing **€5.9mn** to the local economy

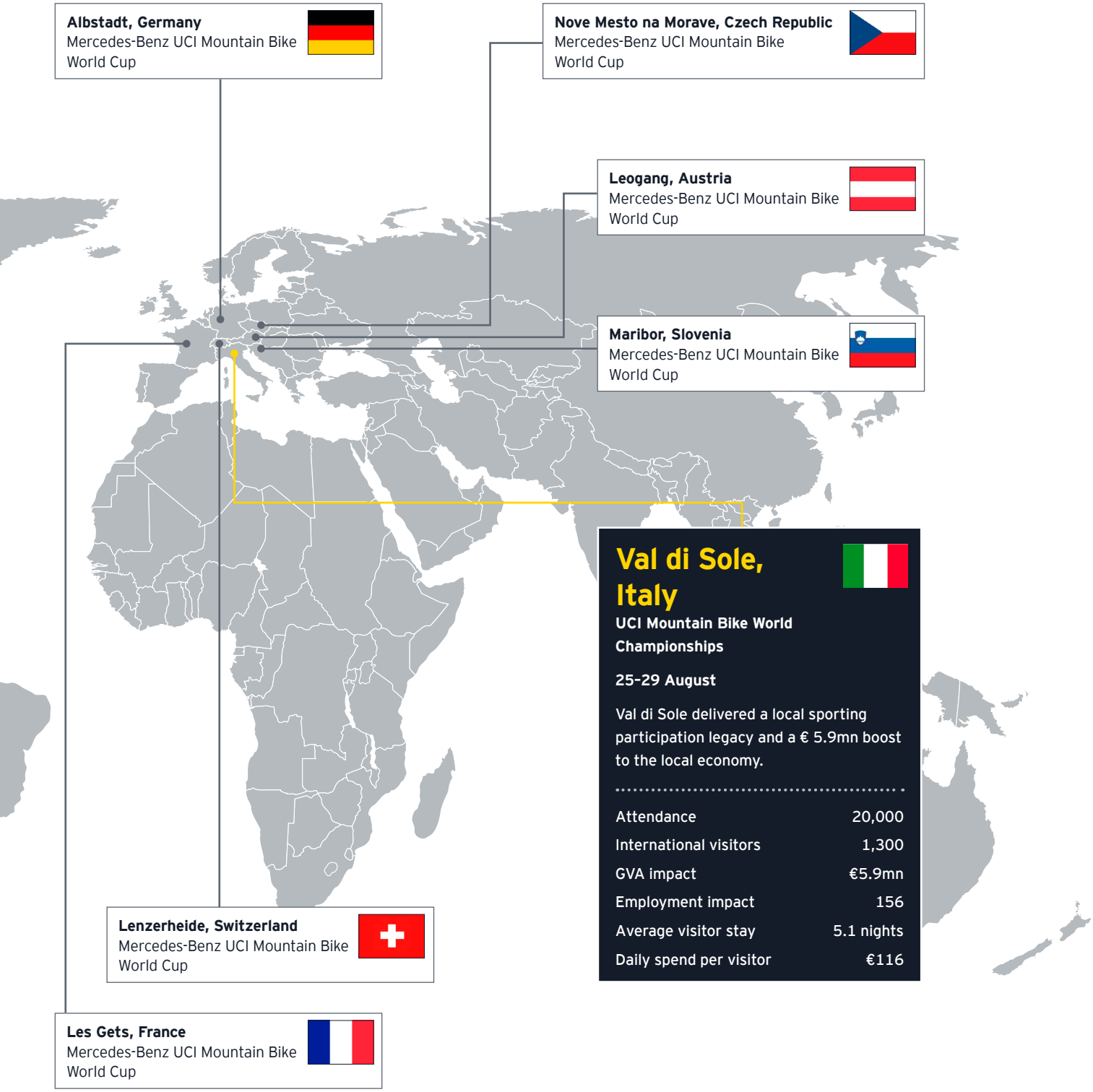
UCI Mountain Bike World Championships and Mercedes-Benz UCI Mountain Bike World Cup

The UCI Mountain Bike World Championships offer the chance for elite mountain bike cyclists represent their nations in cross-country and downhill events each year. The event has been held in 16 different countries, with the first in the United States in 1990.

In 2021, Val di Sole, Italy, hosted the UCI Mountain Bike World Championships for the third time, having previously hosted the UCI Mountain Bike World Championships in 2008 and 2016.

Riders from 56 nations competed in the UCI Mountain Bike World Championships in Val di Sole. The largest contingent of riders came from France, with 70 competitors, followed by Switzerland with 65. Thirteen national teams were represented by a single competitor.

In addition to the UCI Mountain Bike World Championships, the Mercedes-Benz UCI Mountain Bike World Cup takes place each year. This series of events provides professional cyclists with the opportunity to compete for points throughout the season, which then determine each rider's standing within each discipline. In 2021, Mercedes-Benz UCI Mountain Bike World Cup events were held in seven 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
Nove Mesto na Morave, 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
Lenzerheide, Switzerland
Mercedes-Benz UCI Mountain Bike World Cup
Les Gets, France
Mercedes-Benz UCI Mountain Bike World Cup
Val di Sole, Italy
UCI Mountain Bike World Championships
25-29 August
Val di Sole delivered a local sporting participation legacy and a € 5.9mn boost to the local economy.
Attendance 20,000
International visitors 1,300
GVA impact €5.9mn
Employment impact 156
Average visitor stay 5.1 nights
Daily spend per visitor €116

Drivers of economic impact

Total attendance over the course of the event reached 20,000, including 8,000 unique attendees. 7,400 of these were from outside of the region.[6]

Visitor spending averaged €115 per visitor per night for non-local attendees and €120 per visitor per night for international attendees. Combined with the spending of 132 media staff, 1,454 team members and the operational delivery of the Championships, drove €5.9mn of economic activity in Val di Sole and the surrounding region; equivalent to supporting 156 jobs.

Visitors underpinned 69% of the economic impact, through their spending during their stay in the region. The remaining impact was supported by media personnel and teams visitors (20%) and operational delivery of the event itself (11%).

What made Val di Sole unique?

The event in Val di Sole attracted a significant proportion of 'non-local' attendees from areas of Italy outside of Val di Sole, making up 76% of total attendees. The event thereby provided a boost to domestic tourism. Visitors from elsewhere in Italy contributed €3.5mn of the €4.0mn total visitor spend through their demand for accommodation and other goods and services.

Event engagement levels were also very high, with 93% of the attendees being 'satisfied' or 'very satisfied' with the event.

132
media staff covered the event

€105k
total visiting media spend

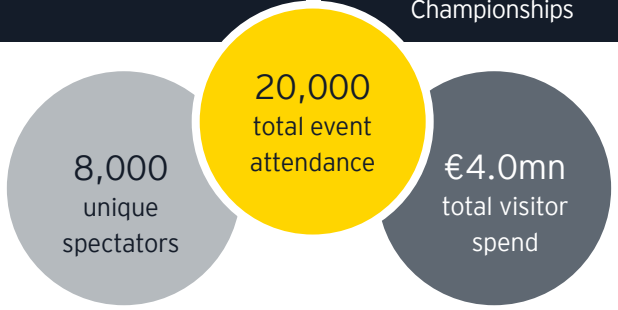
1,454
members of competing teams

€1.1mn
total visiting team spend

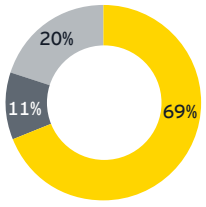
Source: EY analysis

€5.9mn
total GVA impact from the UCI Mountain Bike World Championships

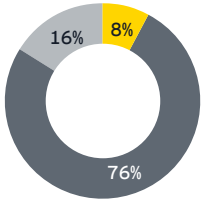
156
total employment impact supported by the UCI Mountain Bike World Championships



Breakdown of GVA impacts by source



Origin of spectators at the UCI Mountain Bike World Championships in Val di Sole

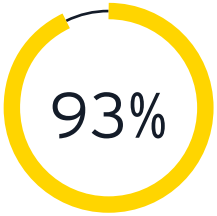


Source: EY analysis

[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 Val di Sole, whose expenditure throughout the course of the event is not considered additional to the region.

Val di Sole saw particularly high levels of satisfaction

Val di Sole residents were either satisfied or very satisfied with the event



Overall visitors were either satisfied or very satisfied with the event

Source: UCI, EY analysis

Overall, the event achieved high satisfaction levels, with non-local and international attendees slightly more satisfied than local attendees. Additionally, 96% of surveyed international visitors to Val di Sole stated that they would be 'likely' or 'very likely' to recommend the region for a holiday destination to their friends and family.

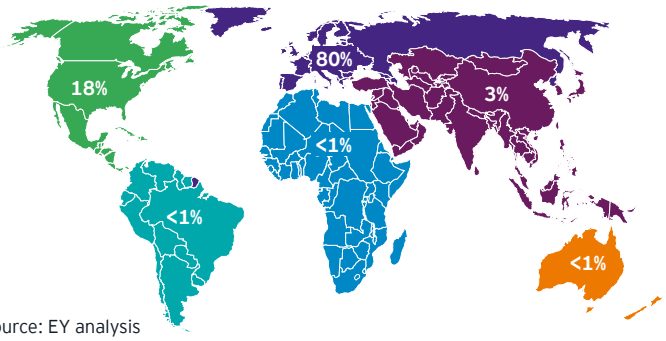
Visitor surveys* suggest that around 7,400 attendees were estimated to have originated from outside of Val di Sole; of those, 1,300 travelled from abroad. The majority of international visitors came from Europe (80%), followed by North America (18%) and Asia (3%).**

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	3.4	120
Non-local visitors	5.4	115

Figures in table may not reconcile with chart due to rounding

Origin of international visitors by continent (%)



Source: EY analysis

Online engagement with the UCI Mountain Bike World Championships was also successful, as social media coverage reached wider audiences.

Facebook

28.5mn total reach

12mn video views

Twitter

3.0mn impressions

400,000 video views

Instagram

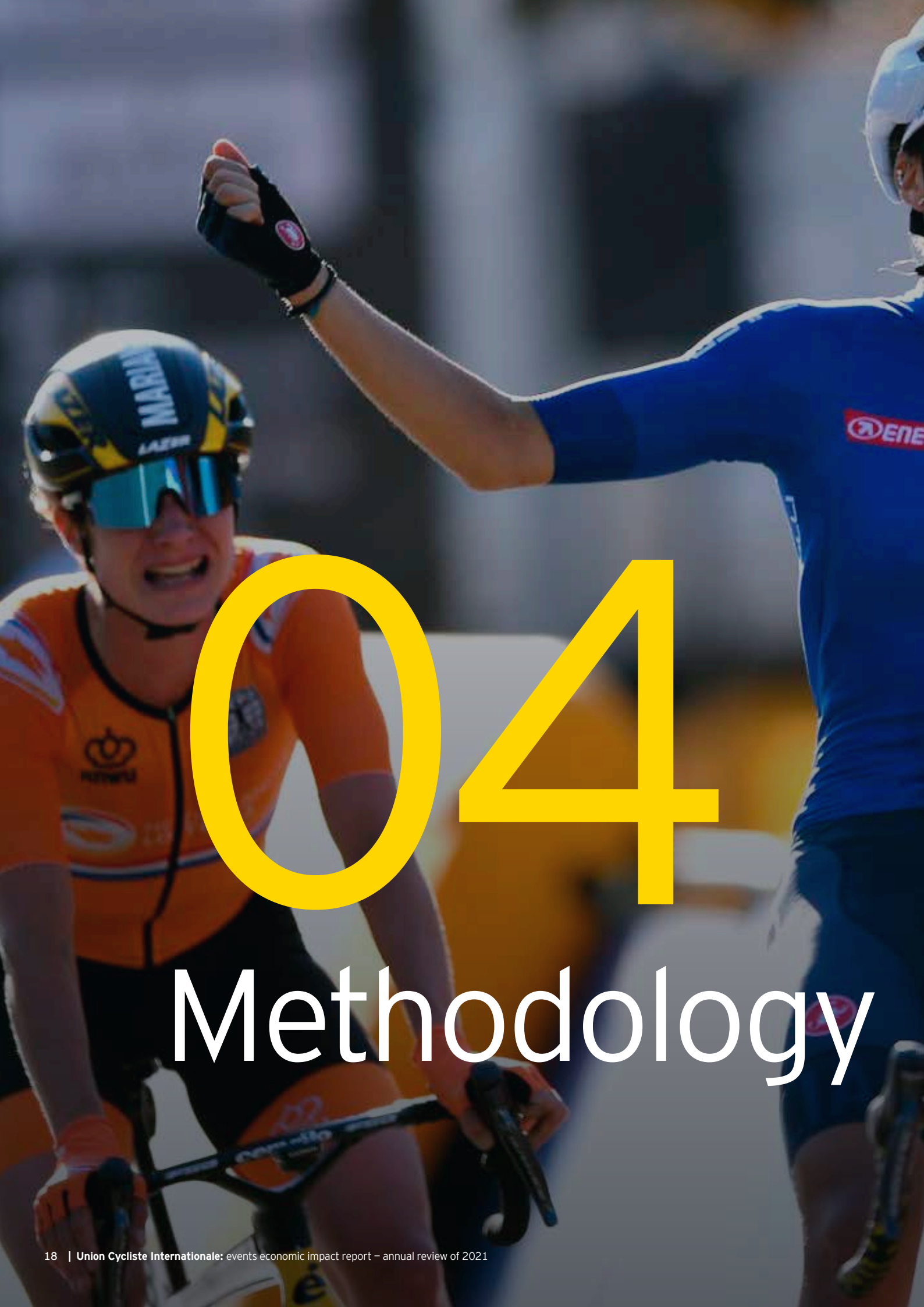
6.8mn total reach

1mn video views

The UCI Mountain Bike World Championships were broadcast in **113 countries**, with a cumulative audience of **15mn** and **4mn** hours viewed. This represented an increased number of countries broadcast in compared to 2020 (112), but a decline in both audience (25mn) and hours viewed (7mn).

* Primary research was conducted to estimate the number of visitors travelling to Val di Sole and Trentino over the course of the event and their spending patterns, as well as activities undertaken during their stay. This involved gathering information from spectators during and after the event, as well as from media personnel and race team members

**Numbers do not sum to total due to rounding



04 Methodology

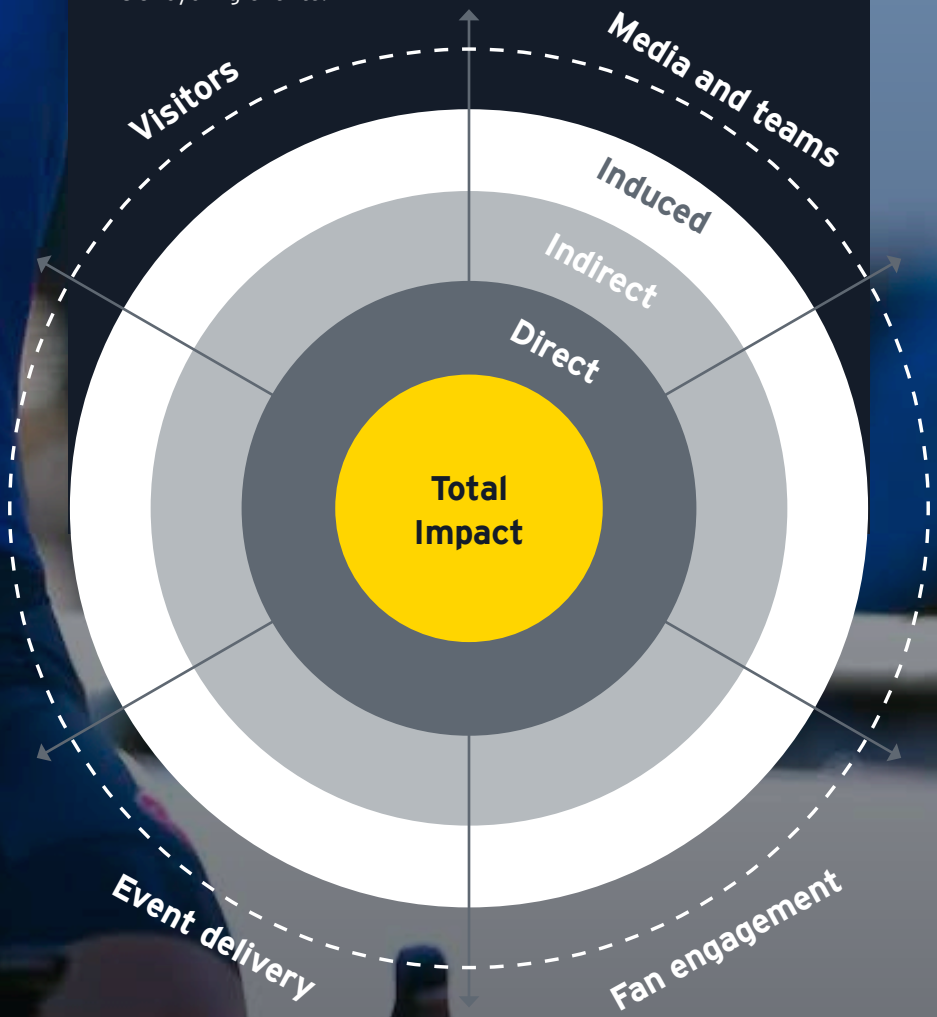
Impact measurement methodology

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.

The remainder of this section provides further details regarding the methodology used to estimate the impacts of UCI cycling events.



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 UCI event, including the spending patterns of visitors and the activities undertaken during their stay. This involved conducting survey interviews and sharing online questionnaires with three groups of people during the course of each 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 be 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 derived from increased sports participation supported by the events are not quantified as part of this study, thought 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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