

Union Cycliste Internationale

Events economic impact report

Annual review of 2022

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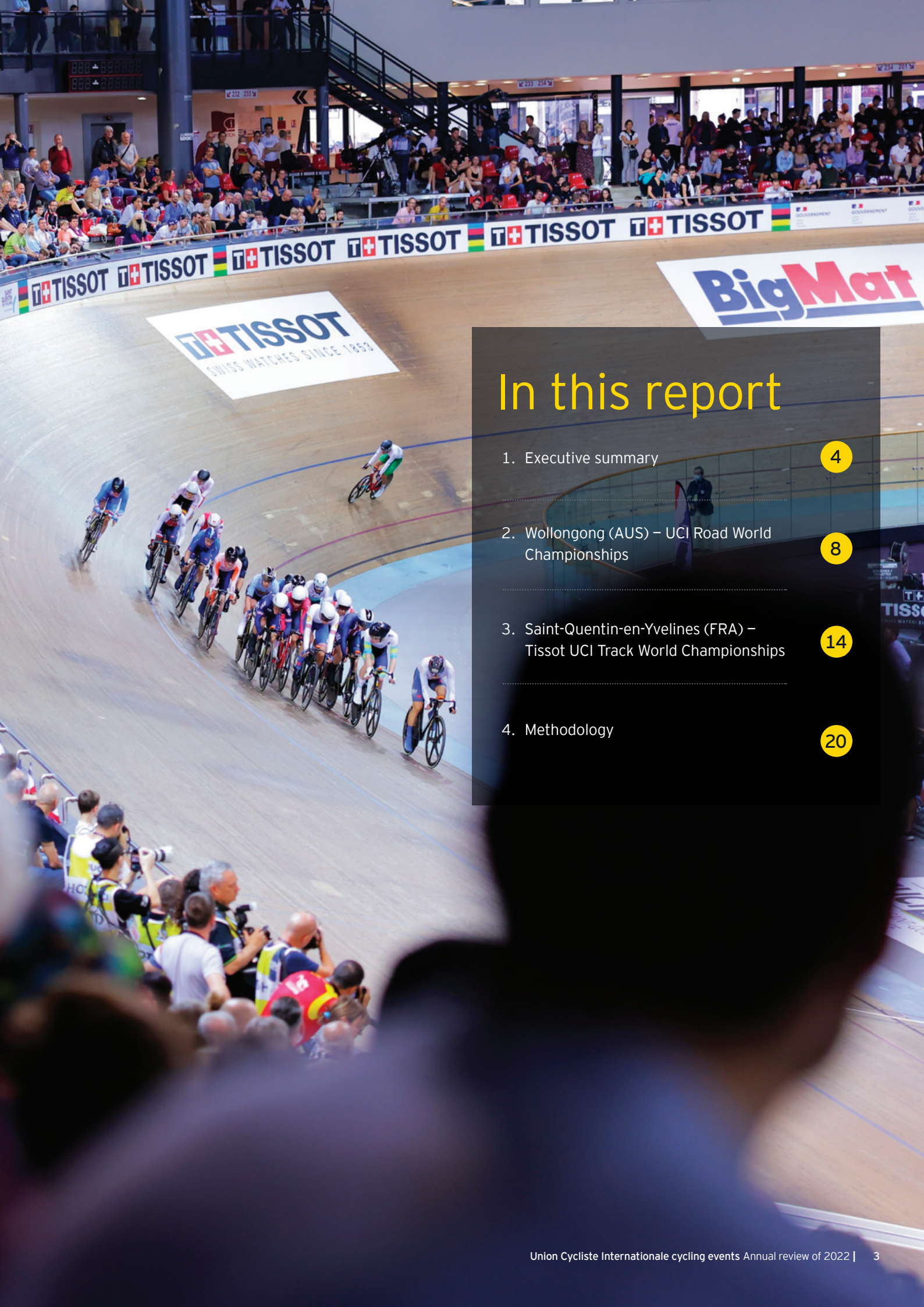
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01

Executive summary



In 2022, UCI events were staged across **26 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.

2022 saw the full removal of travel restrictions across large parts of the world, enabling the UCI World Championships to draw visitors from across the world.

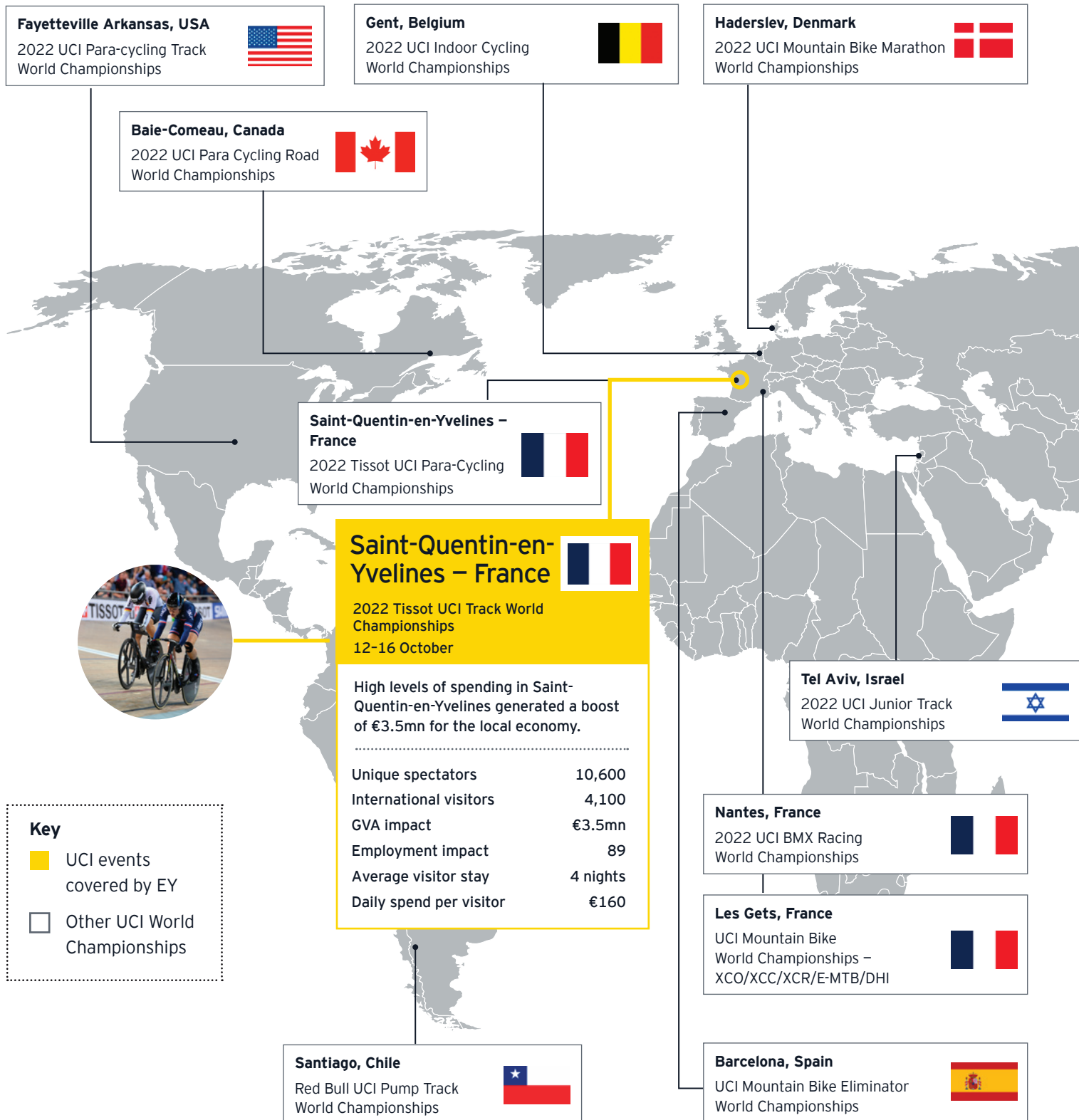
The UCI's schedule included events spanning all five continents, encompassing all cycling disciplines and ranged from events such as the UCI Indoor Cycling World Championships to the UCI Urban Cycling World Championships. This variety allowed UCI events to again reach a wide and diverse audience, with different levels of operational support and investment required to achieve success.

Cycling events drive significant economic and social impacts

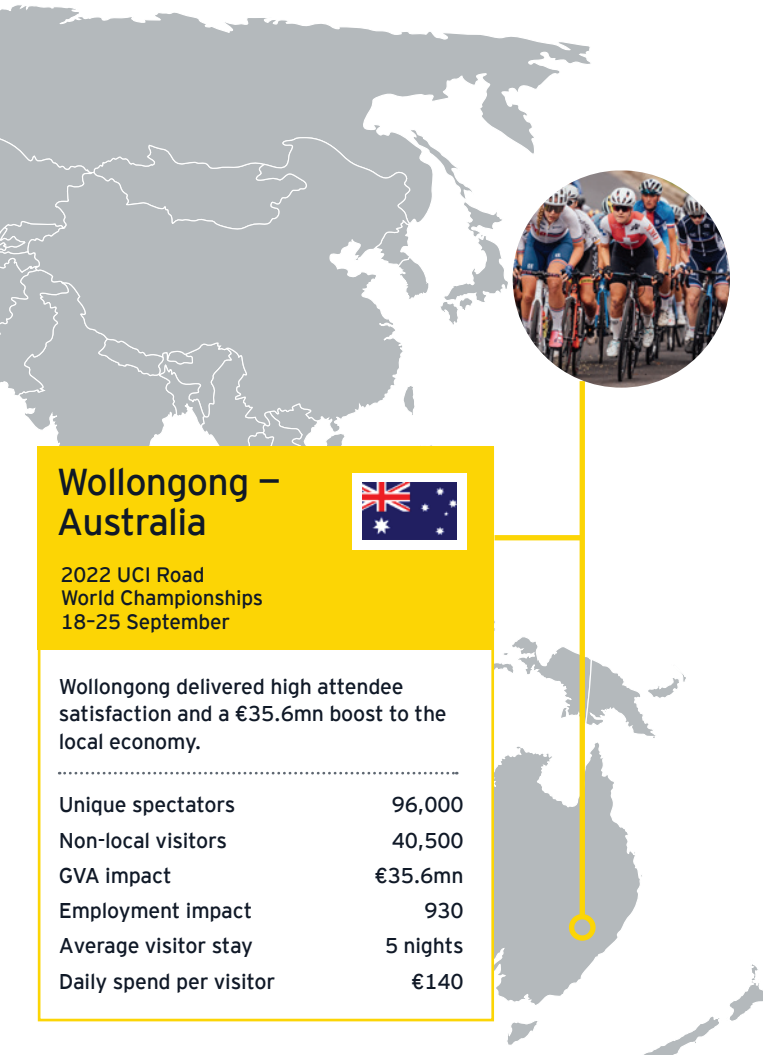
These events provide a platform for the participating athletes and teams to test their abilities and offer the event hosts an opportunity to showcase their region, attracting significant numbers of new visitors and often large numbers of professionals and volunteers to deliver the event.

The UCI delivered 93 events across 26 countries¹

Selected UCI events from 2022



1. The map shows the 2022 UCI World Championships. The economic impact of two events highlighted have been assessed by EY.



93
total events
hosted

5,630
people competed in
UCI events

Representatives of
110
nations took part in
UCI events

€39mn
economic impact
generated by two
events alone

This report explores the economic impact of UCI World Championships events in 2022. The findings summarised within this report are based on research conducted by EY on behalf of the UCI throughout 2022.

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.



2022 ROAD
WORLD CHAMPIONSH



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#WOLLONGONG2022



Wollongong south wales

50

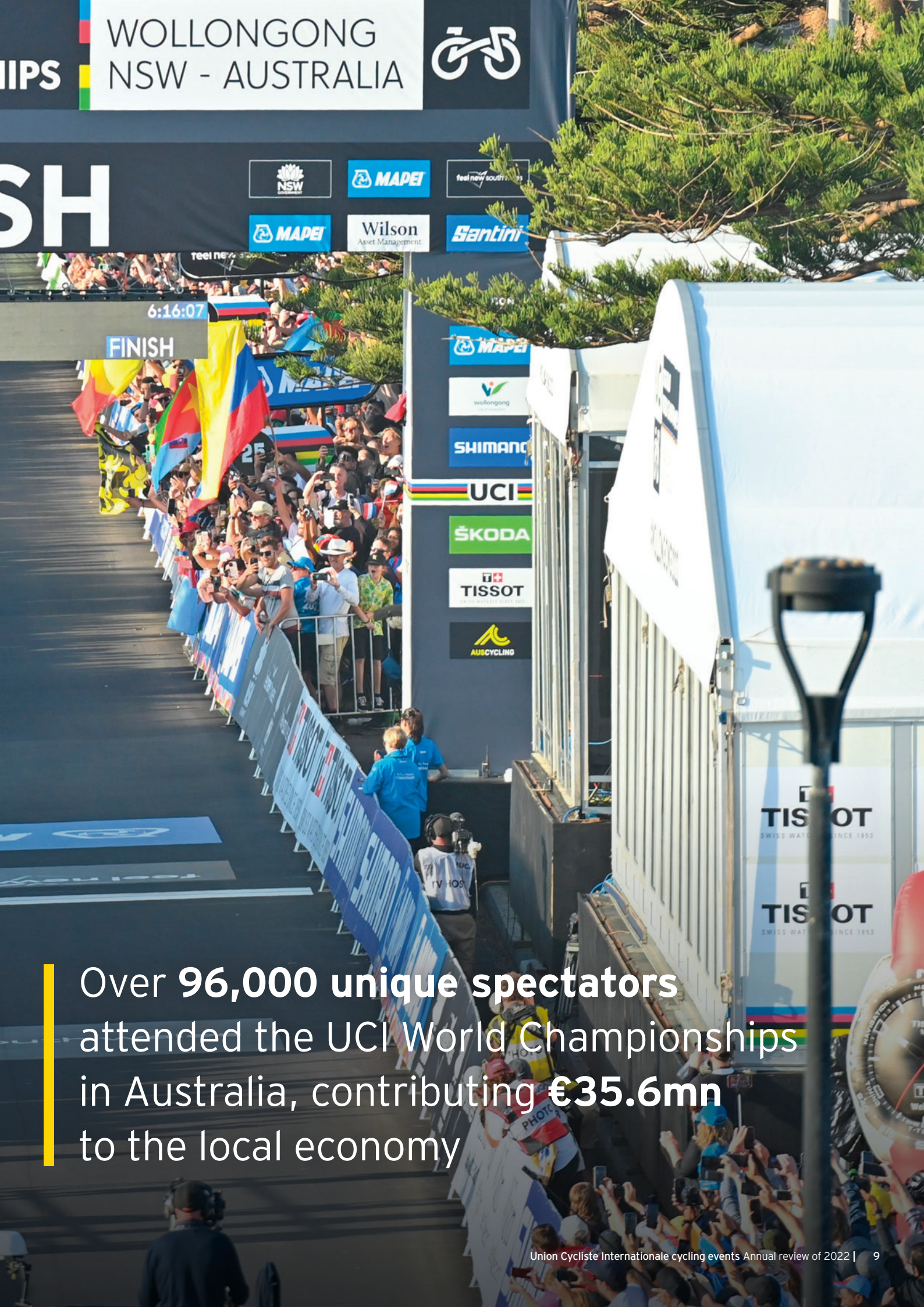


2022

Wollongong
(AUS)

UCI Road World
Championships



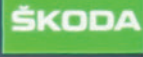


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Over **96,000** unique spectators attended the UCI World Championships in Australia, contributing **€35.6mn** to the local economy

The UCI Road World Championships

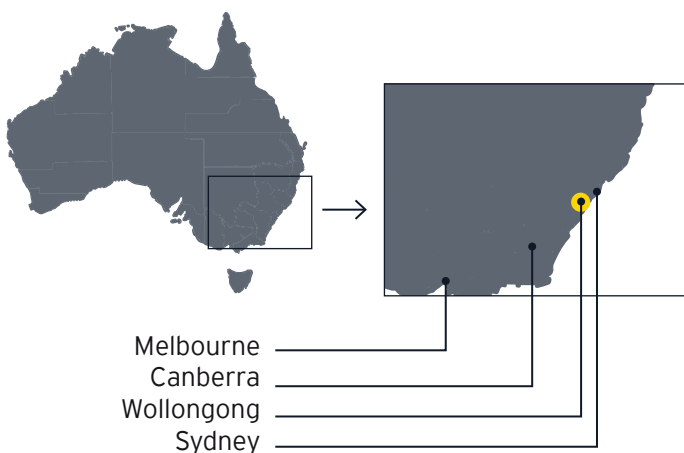
2022 brought the flagship event of road cycling to Wollongong in Australia. Thousands of visitors travelled to Wollongong – just 80km away from Sydney – along with competitors from over 70 nations, media and officials to attend one of the world’s top sporting events showcasing both Wollongong and Australia to an international audience. Annemiek van Vleuten of the Netherlands claimed gold in the Women Elite road race, whilst Belgian Remco Evenepoel secured victory in the Men Elite road race.

These events bring together the best road cycling athletes from around the world to compete in road races, individual time trials and the team time trial mixed relay, 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 celebrating the sport’s unique blend of athleticism and adrenaline. The 2022 edition encompassed a technical time trial course centred on Wollongong, with elevation-heavy road races taking in the coast and challenging climbs.²

Competitors representing 73 nations in total participated in the event, which took place between Sunday 18 and Sunday 25 September. The largest contingents came from Italy (51), Germany and the Netherlands with 47 members each, whilst eleven nations were represented by just a single member.

Wollongong in New South Wales

Wollongong is a city on the New South Wales coast of Australia, about 80km south of Sydney. It’s the 10th largest city in Australia by population, as home to over 300,000 people.

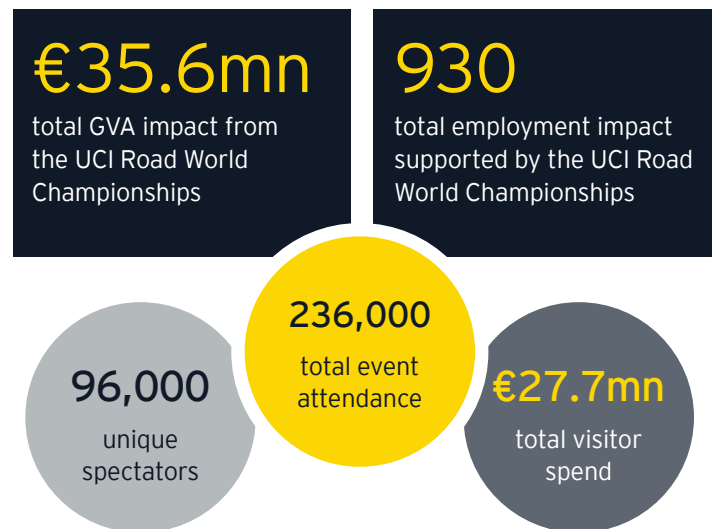


Drivers of economic impact

Total attendance over the course of the event reached 236,000, including 96,000 unique attendees. 41,000 of these were from outside of the region.³

Visitor spending averaged €137 per visitor per night for non-local attendees and €203 per visitor per night for international attendees. Combined with the spending of media visitors and almost 1,000 riders, the UCI Road World Championships generated an impact of €35.6m.

Visitors underpinned 82% of the economic impact, through their spending during their stay in the region. The remaining impact was equally split between event delivery, and visiting media and teams.



What made Wollongong unique?

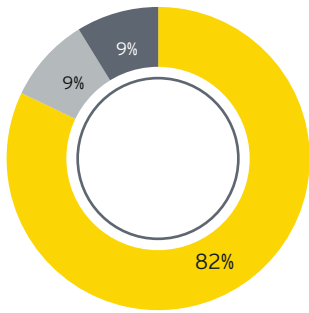
2022 was just the second time that the UCI Road World Championships have been held in Australia, meaning international travellers had (on average) further to travel than in most years. Despite this, 37% of visitors came from overseas, well in excess of the proportions seen at previous UCI Road World Championships in Flanders (Belgium) and Yorkshire (Great Britain).

Visitors to Wollongong spent €140 per night on average, exceeding the expenditure seen at previous events in Flanders, Yorkshire and Innsbruck (Austria).

2. Cyclingnews.com; UCI.org

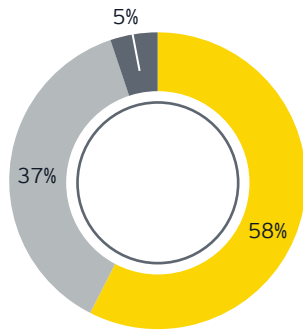
3. Unique visitors, rather than unique spectators, are the main driver of the economic impact. This is because unique spectator figures include residents from within Wollongong, whose expenditure throughout the course of the event is not considered additional to the region.

Breakdown of GVA impacts by source



- Visitor spend
- Event delivery
- Media and teams

UCI Road World Championships in Wollongong origin of spectators at the event



- Local
- Non-local
- International

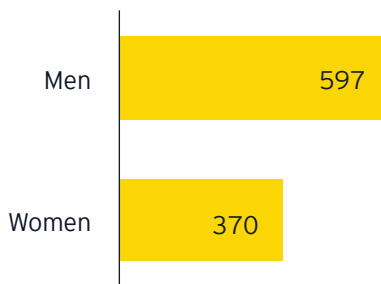
Overall, the event achieved high satisfaction levels, with 97% of attendees satisfied with the event. Both non-local and international visitors were enthusiastic about the event, and this translated into positivity about Wollongong as a holiday destination, with 74% of international and 88% of non-local visitors likely to recommend the region for a holiday.

UCI Road World Championships events:

Road Race – Women Elite, Men Elite, Men U23, Women Junior, Men Junior.

Time Trial – Women Elite, Men Elite, Men U23, Women Junior, Men Junior, Mixed Relay.

Participation by gender



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

Instagram

7.5mn
impressions

17.1mn
video views

Twitter

14.3mn
impressions

3.5mn
video views

Facebook

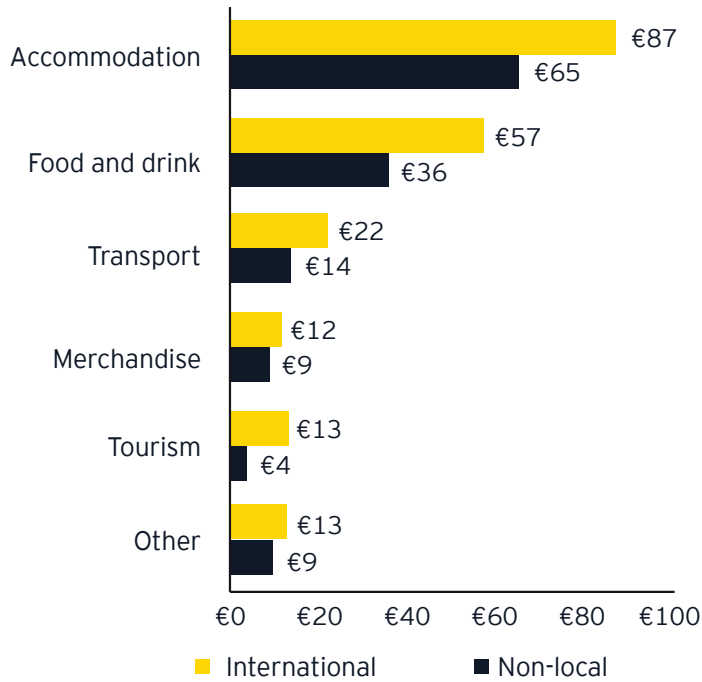
14.3mn
total reach

5.5mn
video views

The UCI Road World Championships were broadcast in **59** countries, with a cumulative audience of **132** million.



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



Visitor spend throughout the event was relatively high, with international visitors staying for an average of 6.2 nights, driven by the often very large distances travelled to the event. While in the country international visitors spent over €200 per person per day. Most of the spend was on accommodation, at over €80 per night, with food and drink the next largest category at almost €60 per day.

Non-local visitors from elsewhere in Australia stayed for less time, 5 days on average, but still spent a reasonably large amount per night.

Average number of nights stayed

Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	6.2	203
Non-local visitors	4.9	137

Figures in table may not reconcile with chart due to rounding.







A background image showing a cycling race in progress. Several cyclists are visible on the track, wearing various colored jerseys (yellow, blue, white, green). A large crowd of spectators is visible in the stands behind the track. The image is slightly blurred to convey motion.

03

Saint-Quentin-en-Yvelines (FRA)

Tissot UCI Track
World Championships

Attendance of 11,000 unique spectators at the event, and a total audience of **145m** people, contributing **€3.5mn** to the local economy

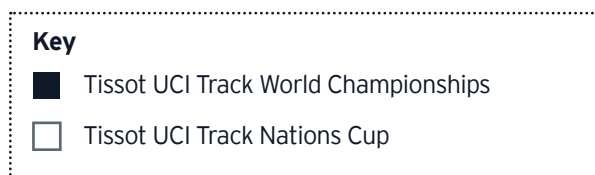
Tissot UCI Track World Championships and Tissot UCI Track Nations Cup

The Tissot UCI Track World Championships is an annual event in which the world's elite cyclists compete in track races. The event has been held in 16 different countries.

The 2022 event was the 17th time the UCI Track World Championships had been held in France, more than any other country. It was the second year in a row for France to host the Championships.

Riders from 50 nations competed in the Tissot UCI Track World Championships in Saint-Quentin-en-Yvelines. The largest contingent of riders came from Italy, with 24 competitors, followed by Germany with 21. 14 national teams were represented by a single competitor.

In addition to the Tissot UCI Track World Championships, the Tissot UCI Track Nations 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 ranking within each speciality. In 2022 the three rounds were held in three different countries: Colombia, Canada and Great Britain.



Glasgow, Great Britain
2022 Tissot UCI Track Nations Cup



**Saint-
Quentin-en-
Yvelines-
France**



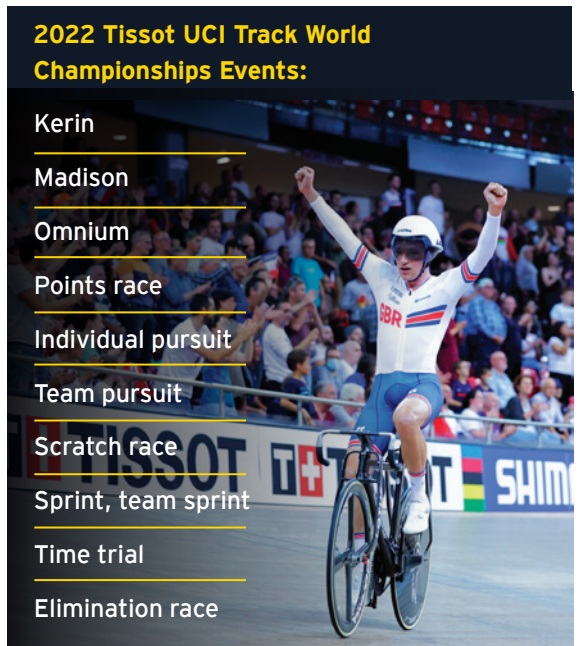
2022 Tissot UCI Track World Championships
12-16 October

High levels of spending in Saint-Quentin-en-Yvelines generated a boost of €3.5mn for the local economy.

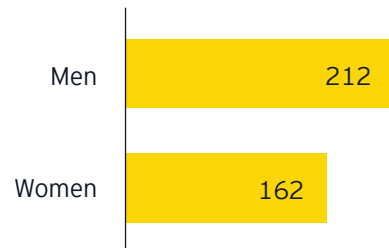
Unique spectators	10,600
International visitors	4,100
GVA impact	€3.5mn
Employment impact	89
Average visitor stay	4 nights
Daily spend per visitor	€153

2022 Tissot UCI Track World Championships Events:

- Kerin
- Madison
- Omnium
- Points race
- Individual pursuit
- Team pursuit
- Scratch race
- Sprint, team sprint
- Time trial
- Elimination race



Participation by gender



Saint-Quentin-en-Yvelines

Saint-Quentin-en-Yvelines is a suburban town and a commune in the Yvelines department in the Île-de-France region of France. It is located about 20 km southwest of Paris and covers an area of 25.6 square kilometres. Being one of the five original new towns of Paris, it is home to a population of 228,000 people making it one of the more populous suburban towns in the region.

Drivers of economic impact

Total attendance over the course of the five day event reached 17,000, including 11,000 unique attendees, each spending an average of 1.6 days at the event. Over 4,000 of these were from outside of the region.⁴

Visitor spending averaged €186 per visitor per night for international attendees and €120 per visitor per night for non-local attendees. Combined with the spending of 237 media staff, 757 team members and the operational delivery of the Championships, this drove €3.5mn of economic activity in Saint-Quentin-en-Yvelines and the surrounding region; equivalent to supporting 89 jobs.

Visitors underpinned 40% of the economic impact, through their spending during their stay in the region. The remaining impact was supported by media personnel and teams visitors (48%) and operational delivery of the event itself (12%).

What made Saint-Quentin-en-Yvelines unique?

The event in Saint-Quentin-en-Yvelines – the first Tissot UCI Track World Championships to be free of Covid restrictions since 2019 – drew in a significant number of visitors over its five day duration, with visitor spend totalling €3.7mn. This was notably higher than the visitor spend observed in previous UCI Track World Championships held in Berlin, Germany, in 2020 (€1.3mn) and Apeldoorn, the Netherlands, in 2019 (€0.9mn).

The event was also particularly popular domestically, with 91% of attendees being locals or non-locals, a higher percentage than past UCI Track World Championships in Berlin and Apeldoorn.

237

media staff covered the event

€212k

total visiting media spend

757

members of competing teams

€1.8mn

total visiting team spend

Source: EY analysis



€3.5mn

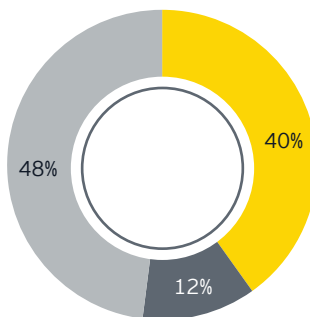
total GVA impact from the Tissot UCI Track World Championships

89

total employment impact supported by the Tissot UCI Track World Championships

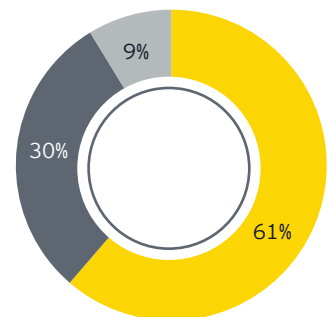


Breakdown of GVA impacts by source



Visitor spend
Event delivery
Media and teams

Tissot UCI Track World Championships in Saint-Quentin-en-Yvelines origin of spectators



Local spectators
Non-local
International

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 Saint-Quentin-en-Yvelines, whose expenditure throughout the course of the event is not considered additional to the region.

Visitor surveys⁵ suggest that around 4,000 attendees were estimated to have originated from outside of Saint-Quentin-en-Yvelines; of those, 900 travelled from abroad. The majority of international visitors came from Europe (80%), followed by North America (15%).⁶

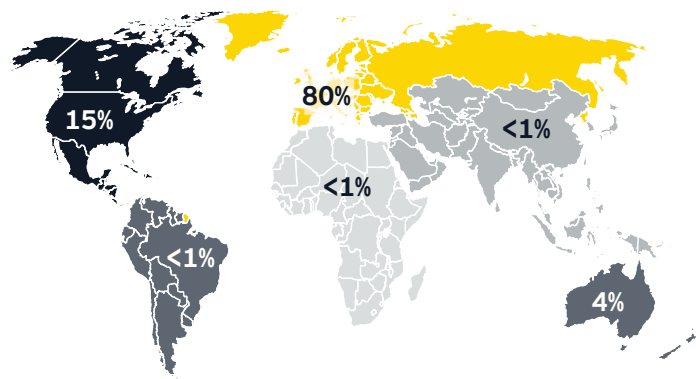
The international visitors were primarily from the surrounding countries of Belgium, the United Kingdom, and the Netherlands. They stayed for almost 5 days on average, twice as long as visitors from other areas of France.

Average number of nights stayed

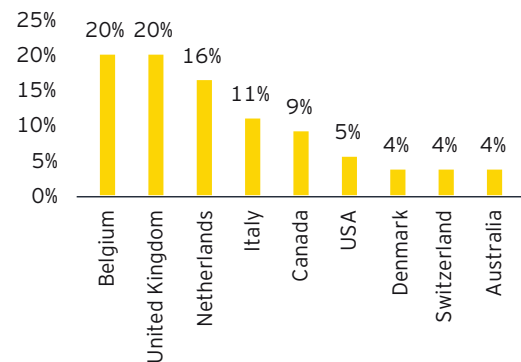
Origin	Length of stay (nights)	Daily spending per visitor (€)
International visitors	4.8	186
Non-local visitors	2.3	120

Figures in table may not reconcile with chart due to rounding.

Origin of international visitors by continent (%)⁷



Origin of international visitors by country (%)



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

Instagram

5.8mn
impressions

5.3mn
video views

Twitter

3.7mn
impressions

1.0mn
video views

Facebook

7.8mn
total reach

2.4mn
video views



5. Primary research was conducted to estimate the number of visitors travelling to Saint-Quentin-en-Yvelines 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.

6. Numbers do not sum to total due to rounding.

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

A blurred background image of a cycling track. In the foreground, three cyclists in blue and white USA team kits are riding on the track. The background shows a large, blurred crowd of spectators in the stands, and the track's lighting and structure are also blurred, creating a sense of motion.

04

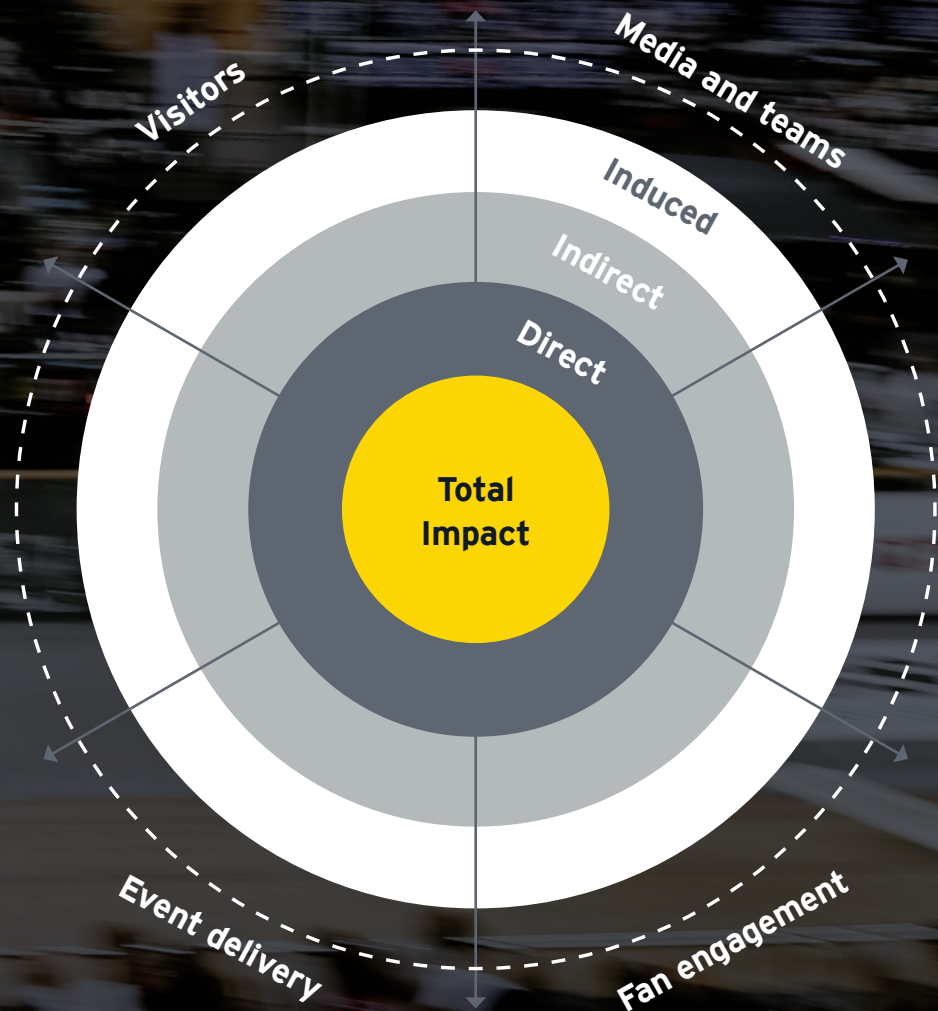
Methodology

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 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.
- ▶ Due to the lack of detailed data availability for Abu Dhabi and the UAE, data has been drawn from Saudi Arabian national accounts collated by the Organisation for Economic Cooperation and Development as a proxy for the national UAE economy, and from Kuwaiti National Accounts published by their Central Statistical Bureau as a proxy for the local Abu Dhabi economy.

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 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, 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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ED None



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