

# TOURIST ECONOMIC IMPACT ANALYSIS AND EVALUATION

UCI Road World Championships 2011 19 - 25 September 2011 in Copenhagen and Rudersdal

SPORT EVENT DENMARK
HOSTING WINNERS



# **Preface**

Denmark is known as a genuine bike country and, the Capital Copenhagen, in particular, as a genuine bike city. 50 % of the inhabitants of Copenhagen take their bike to work all year round. Hence this seems the perfect place to welcome major cycling events and especially the 2011 UCI (Union Cycliste Internationale) Road World Championships.

The 2011 UCI Road World Championships event is part of the Bike City Copenhagen project, which HRH Crown Prince Frederik is protector for. Copenhagen was the first city in the world to be appointed as Bike City by the UCI in 2007. Only Melbourne has also (in August 2011) received this status as well. Between 2008 and 2011, Copenhagen has hosted six major international cycling events, the UCI Road World Championships 2011 being the largest of them.

The municipalities of Copenhagen and Rudersdal, respectively, hosted the 2011 UCI Road World Championships in the period 19<sup>th</sup> to 25<sup>th</sup> September 2011 and welcomed an estimated live audience of 545,000 spectators, 3,000 riders, trainers etc. and almost 800 media representatives during the six days of cycling. Copenhagen, hosted the time trial events as well as the start of the men's elite road race, whilst Rudersdal hosted the individual road races.

Prior to the event, the Steering Committee of the 2011 UCI Road World Championships event assigned representatives of Sport Event Denmark and Wonderful Copenhagen to carry out a comprehensive impact analysis of the event's significance for the Capital Region and Denmark overall.

The purpose and focus areas of the impact analysis have been:

- To determine the Championships' <u>tourism economic spin-offs</u> in the Capital Region of Copenhagen and in Denmark overall, based on the nationally acknowledged macroeconomic model LINE.
- To measure the <u>overall satisfaction levels among spectators and media representatives</u> in terms of hosting of the event. The analyses were based on surveys conducted among spectators and the media by one of Denmark's leading opinion pool agencies, Epinion
- To measure the <u>attitudes among local citizens</u> in the municipalities of Rudersdal and Copenhagen to the Capital Region hosting the Championships. The analyses were based on opinion poll surveys conducted in the municipalities of Copenhagen and Rudersdal by Epinion.
- To provide a quantitative and qualitative assessment of <u>the Danish media coverage</u> of the event as well as a quantitative assessment of <u>the international online media coverage</u> based on the news databases InfoMedia and Meltwater News.
- To provide a quantitative assessment of the <u>TV coverage</u> that the event generated based on IFM's (international sports consultancy) TV analysis.

The results of the different analyses are presented in this report in five chapters. The key findings as well as a short discussion are presented in the Executive Summary.

The surveys among spectators and media representatives as well as the survey among citizens in Copenhagen have been funded by Sport Event Denmark. On top of this, Sport Event Denmark has funded the TV-coverage analysis. VIBE<sup>1</sup>, on the other hand, has funded the survey among citizens in Rudersdal.

The impact analysis is partly supported by the European Regional Development Fund under the European Union, as part of the project "Innovation in the Capital Region's Tourism Effort". Wonderful Copenhagen by Lone Alletorp Callard, Senior Analyst and Sport Event Denmark by Birgitte Schultz, Senior Analytical Advisor have delivered the analytical manpower to carry out the impact analysis report based on the different surveys.





The 2011 UCI Road World Championships

<sup>&</sup>lt;sup>1</sup> VIBE is the capital region's research and knowledge centre for events.

# **Executive summary**

The 2011 UCI Road World Championships were in many respects a great success for the Capital Region of Copenhagen and Denmark; and for Danish cycling sport. The number of spectators exceeded the expected numbers by many thousands and everybody was struck by the professionalism of the Danish organizers, both nationally and internationally. Millions of TV viewers watched the races and pictures of the fantastic countryside and of a capital city, like no other city before, with closed off streets and a race start at the City Hall square. The result; a world championship shown worldwide and at the same time brought directly to enthusiastic local citizens. There is no doubt the TV exposure and extensive press coverage will have positive long term branding effects.

In addition, the 2011 Championships added a financial injection to the tourist sector in the Capital Region and to Denmark overall. The tourism economic turnover generated by the event exceeded the expected estimate by several millions.

Visiting spectators were very satisfied with the event and their stay in the Capital Region of Copenhagen, and an opinion poll among the local population in the Capital Region showed that despite traffic challenges the local citizens in the region supported the hosting of the Championships.

Further conclusions are summarized below:

- A total tourism economic turnover of approximately DKK 232 million (Euro 31.2 million) was generated by the Championships, hereof DKK 176 million (Euro 23.7) from international tourists (76%).
- A total live audience of 545,000 spectators viewed the six days of cycling. Approximately 40% of the spectators where tourists (non-local Danes and international tourists) standing along the routes, cheering for the cyclists. The majority were young <25 years.
- A total of approximately 262,000 individual spectators (locals, non-locals and international spectators) attended the cycling event; hereof 15% were international spectators.
- A total of approximately 118,000 bed nights were generated by the Championships, hereof approximately 24,000 non-local Danish bed nights and 94,000 international bed nights. Of these 118,000 bed nights, approximately 88,000 were commercial bed nights (=75%).
- The derived effects generated by the event amounts to 262 fulltime jobs, and DKK 72 million (Euro 9.7 million) in tax revenue.
- **High satisfaction levels among spectators.** As many as 83% were overall 'very satisfied' or 'satisfied' with the Championships. 84% stated that they were overall 'very satisfied' or 'satisfied' with their stay in the Capital Region.

- **High satisfaction levels among the media representative**. The media representatives were very satisfied with their event stay in terms of six out of seven parameters and moderately satisfied with the 7<sup>th</sup> parameter food and drinks in the media working area.
- **Happy citizens despite**. Citizens in both Copenhagen and Rudersdal were affected by the event but, felt that pre-event public information enabled them to adjust to the situation and did *not* face any unacceptable traffic nuisance during the event
- The local citizens felt proud that such a huge event as the Championships was hosted in the region
  and felt that it is important for the region and Denmark to brand itself by hosting major sports
  events.
- The cumulated audience of the Championships came up to 206 million TV viewers and the total broadcasting time for the Championships was 410 hours and 26 minutes. (This is preliminary results, as the final results were not available at the time of writing).
- Negative Danish press start but ended with a hooray The Danish press transformed from being
  mainly negative prior to the event, with articles focusing on closed street and traffic jam, to being
  overwhelmingly positive by the end of the event.
- The total amount of relevant international online articles amounted to 40,441 articles (09.2010-10.2011) of these, 15,378 articles were published in September 2011. A tentative tone analysis indicated that the international press has been positive towards the event and the Capital Region of Copenhagen

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# **Chapter 1: Tourism economic impact analysis**

#### 1.1 Introduction

This part of the report describes the findings of the tourism economic impact analysis of the 2011 UCI Road World Championships. The purpose of the analysis is to capture and evidence the macroeconomic spin offs of the Danish hosting of the event. The tourism economic impact analysis will partly determine the total amount of additional expenditure generated by visitors from outside the host region, as a direct consequence of staging the Championships, partly measure the derived effects, such as employment, gross value added and increased tax revenue of the increased spending in the host economy (= the Capital Region of Copenhagen) and in Denmark totally.

As described in more in details in <u>section 1.5.1 Limitations</u> the report does not take into account a possible displacement effects or the offset on the derived effects of using volunteers during the event. Further, it should be noted that this analysis only looks at the tourism economic benefits of staging the event. The costs associated with staging of the event are not included.

# 1.2 Summary and conclusions – Impact analysis

In order to calculate the macroeconomic spin offs of the Danish hosting of the Championships a visitor survey was conducted based on a representative sample of spectators and media representatives. The main findings of the tourism economic impact analysis are summarized below:

- A total tourism economic turnover of approximately DKK 232 million (Euro 31.2 million) was generated by the Championships, hereof DKK 176 million (Euro 23.7) from international tourists (international share = 76% of total turnover).
- A total live audience of 545,000 spectators viewed the six days of cycling. Approximately 40% of the spectators where tourists (non-local Danes and international tourists) standing along the routes, cheering for the cyclists. The majority were young (<25 years).
- A total of approximately 262,000 individual spectators (locals, non-locals and international spectators) attended the cycling event; hereof 15% were international spectators.
- A total of approximately 3,000 delegates (riders, trainers etc.) and 768 media representatives attended the event.
- A total of approximately 118,000 bed nights were generated by the Championships, hereof approximately 24,000 non-local Danish bed nights and 94,000 international bed nights. Of these approximately 88,000 were commercial bed nights.
- The Championships generated approximately 262 fulltime jobs, hereof 225 jobs in the Capital Region of Copenhagen.

- A total of DKK 72 million (Euro 9.7 million) in tax revenue was generated by the event, divided between state, regional and municipality taxes with the main part to the state due to taxes and dues (VAT etc.). Of the 72 million DKK (Euro 9.7 million), DKK 53 million (Euro 7.1 million) was generated in the Capital Region of Copenhagen. DKK 7 million (Euro 0.9 million) went directly to the region from income taxes.
- Of the DKK 232 million (Euro 31.2 million) in turnover, **DKK 132 million (Euro 17.8 million) remain** in **Gross Value Added**, (hereof DKK 121 million (Euro 16.3 million) stays in the Region).

# 1.3 Number of visitors, their spending and length of stay

The UCI World Championships 2011 attracted a live audience of estimated 545,000 spectators, who watched the bicycle races and cheered on the riders along the cycle routes in Copenhagen and Rudersdal during the six days long Championships. The total number live audience has been estimated by the organizers of the event in cooperation with the National Police, and was well over the beforehand estimated number of 400,000.

Approximately 60% of the live audience spectators were locals, <u>40% were visiting spectators</u> (non-local and international visitors). Approximately 85,000 were international spectators (15%), whilst approximately 133,000 (25%) where visiting Danes living outside the Capital Region. Of the visiting live audience spectators (non-local and international visitors) approximately 93% stayed in the region <u>primarily due to the event</u> (i.e. their main reason for their stay in the region was the Championships).

Many spectators stayed in the region for several days and watched the cycle races for more than one day. Number of spectators (attendance) is hence not the same as number of individuals (attendees) watching the races. Based on the findings of the spectator survey regarding average length of stay, the number of individuals was calculated to be 98,000 individual non-local spectators, (hereof 60% non-local Danes and 40% international spectators). From a total individual spectator point of view (locals, non-locals and international), the international spectators made out 15%. On top of the individual spectators also 3,000 delegates (cycle riders their trainers and other delegates) attended the Championships, as well as approximately 800 press people.

Table 1 Number of spectators (attendance) and individuals (attendees) - approximately

|                                 | Total   | Locals  | Non-local Danes | International | International<br>ratio (%) |
|---------------------------------|---------|---------|-----------------|---------------|----------------------------|
| Spectators (attendance)         | 545,000 | 327,000 | 133,000         | 85,000        | 15%                        |
| Individuals (attendee)          | 262,000 | 164,000 | 59,000*         | 39,000*       | 15%                        |
| Individuals non-local attendees | 98,000  | -       | 59,000*         | 39,000*       | 40%                        |

<sup>\*</sup>deducted visiting spectators staying in the Capital Region but not primarily due to the event (app. 7%)

Table 2 Number of delegates (riders, trainers etc.) and media representatives (attendees)

|                                   | Total | Danes   | International |
|-----------------------------------|-------|---------|---------------|
| Delegates (riders, trainers etc.) | 3,000 | App. 80 | App. 2,920    |
| Media                             | 768   | 275     | 493           |

The Championships generated a total of approximately 118,000 bed nights, hereof approximately 24,000 non-local Danish bed nights and 93,000 International bed nights. Approximately 24% was non commercial bed nights (i.e. visitors staying with friend and relatives).

Table 3 Number of bed nights from non-local visitors (attendees)

|                                  | Danish bed nights | International bed night | Total bed nights |
|----------------------------------|-------------------|-------------------------|------------------|
| Spectators                       | 22,000            | 67,000                  | 89,000           |
| Delegates (riders, trainer etc.) | 640               | 23,360                  | 24,000           |
| Media                            | 1,547             | 3,451                   | 4,998            |
| Total                            | 24,487            | 93,511                  | 117,961          |

The spectators as well as the media staying overnight had a fairly high average daily spending, taking the average length of stay into consideration. Average daily spending includes consumption spent on accommodation, meals etc. In general, international spectators had a higher average daily spending than non-local Danish spectators. Among other things because they choose commercial accommodation to a higher extent than their Danish counterparts.

Average daily spending was for non-local Danish spectators 1,080 DKK (145 Euro) with an average length of stay of 3.5 nights. For international spectators the average daily spending was 1,781 DKK (239 Euro) with an average length of stay of 3.9 nights. Compared to other event impact studies this is within average, but at the high end. Delegates (riders, trainers etc.) are estimated to have spent on average the same amount as spectators on a daily basis although their spending pattern may have been different. Delegates stayed on average 8 nights in the region. The findings from the Media Survey for the press people showed a similar consumption pattern as delegates, with an average daily spending of 1,451 DKK (195 Euro) and an average stay of 7 nights.

Spectators <u>not</u> staying overnight had on average a daily spending of 274 DKK (37 Euro) for non-local Danish spectators, and 376 DKK (51 Euro) for international spectators, which is within average of other event impact studies.

Table 4 Average daily spending and length of stay for non-local visitors staying overnight (DKK)

|                                  | Danish (non-loca | al) visitors        | International visitors |                     |
|----------------------------------|------------------|---------------------|------------------------|---------------------|
|                                  | Ave. daily spend | Ave. length of stay | Ave. daily spend       | Ave. length of stay |
|                                  | (DKK)            | (nights)            | (DKK)                  | (nights)            |
| Spectators (attendees)           | 1,080            | 3.5                 | 1,781                  | 3,9                 |
| Delegates (riders, trainer etc.) | 1,080            | 8                   | 1,781                  | 8                   |
| Media                            | 1,451            | 7                   | 1,451                  | 7                   |

### 1.4 Tourism economic turnover and impacts

The total tourism economic turnover generated by hosting the Championships has been calculated at approximately <u>DKK 232 million</u> (Euro 31.2 million). When calculating the total turnover, only income from non-local Danish visitors and international visitors who are in the Region primarily due to the event are included. Hence the study does not include spending from locals (i.e. people living in the Capital Region of

Copenhagen) viewing the cycle races. Besides, income from non-local Danish visitors only benefits the regional economy whilst solitarily income from International visitors contributes to the economic benefits for the country as a whole.

Using the Event Impact model "Tourism Economic Impact Measurement of Sport, Cultural and Business Events, 2011", which is based on the input output model LINE (see section regarding methodology), the derived effects, such as employment, gross value added and increased tax revenue, of the increased income in the host economy and in Denmark as a whole has been calculated.

**Table 5 Total tourism economic impacts** 

| Total tourism economic impacts                                      | Findings                              |  |
|---|---------------------------------------|--|
| Total tourism turnover  | 231.9 million DKK (31.2 million Euro) |  |
| - Hereof turnover from international visitors                       | 175.7 million DKK (23.7 million Euro) |  |
| - Share of international turnover                                   | 76%_                                  |  |
| Employment effect   | 262 full time jobs                    |  |
| - Hereof in the Capital Region of Copenhagen                        | 225 full time jobs                    |  |
| Gross Value Added   | 131.8 million DKK (17.8 million Euro) |  |
| - Hereof in the Capital Region of Copenhagen                        | 120.6 million DKK (16.3 million Euro) |  |
| Total tax revenue   | 72.0 million DKK (9.7 million Euro)   |  |
| - Hereof generated in the Capital Region of Copenhagen              | 53.3 million DKK (7.1 million Euro)   |  |
| - Hereof in the Capital Region of Copenhagen from income tax solely | 7.0 million DKK (0.9 million Euro)    |  |

The Championships have resulted in the creation of approximately 262 fulltime jobs, 225 being in the Capital Region of Copenhagen. Of the DKK 232 million in turnover DKK 132 million (Euro 17.8 million) remain in Gross Value Added, hereof DKK 121 million (Euro 16.3 million) stay in the Capital Region. Furthermore, the additional spending generated DKK 72 million (Euro 9.7 million) in tax revenue, divided between state, regional and municipality taxes; however, with the state being the main beneficiary. Of the DKK 72 million (Euro 9.7 million), DKK 53 million (Euro 7.1 million) was generated in the Capital Region of Copenhagen – DKK 7 million (Euro 0.9 million) went directly to the Capital Region due to income taxes.

To some extent, however, the derived effects will be offset by the use of volunteers when hosting the Championships. Voluntary work will reduce the estimated employment effects and hence part of the tax revenue coming from income taxes.

# 1.5 Methodology – Impact Analysis

#### 1.5.1 Limitations

The model used to calculate the total tourism turnover and derived effects does not take into account the displacement effect (crowding out effect)<sup>2</sup>, which hosting the Championships might have had on other tourists during the event period. Due to an extensive increase in accommodation capacity in recent years in Copenhagen it is assumed that the displacement effect has been limited. Consultation with the Danish Hotel and Restaurant Association (HORESTA) sector confirms this. Nevertheless, accommodation facilities were fully or close to fully booked in the week of the event and it cannot be completely ruled out that some sort of displacement might have occurred.

To some extent, the derived effects will be offset by the use of volunteers when hosting the Championships. The report does, however, not take this aspect into account in its results. It should, on the other hand, be noted that, as the amount of volunteers at the Championships was as many as approximately 700 people, their efforts (and subsequent development of human skills) represented a substantial value not only to the organizers but also to the society. In fact, the value of their efforts has been estimated at almost DKK 10 million DKK equivalents to Euro 1.3 million. (Note this is a broad estimate based on the following calculations: 700 volunteers x 7 days x 10 hours per day x 200 DKK per hour).

Finally, it should be noted that this analysis only looks at the tourism economic benefits of staging the event. The costs associated with staging of the event are not included. In other words, cash inflows and outflows to establish the net outcome, are not measured, as it would be in a cost benefit analysis.

#### 1.5.2 Spectator survey

A spectator survey was conducted among a representative sample of spectators attending the Championships. In all, 349 face-to-face interviews were conducted on Wednesday 19<sup>th</sup> and Sunday 25<sup>th</sup> September – the two biggest and most popular event days in terms of number of spectators. A screening was conducted prior to the actual interviews to establish the split between locals and non-locals and the split between visitors being in the region *primarily due to the event* and visitors being in the region, but not primarily due to the event. Hence only foreign spectators and non-local Danish spectators (i.e. Danes living outside the Capital Region of Copenhagen), who were in the capital region *primarily due to the event*, were interviewed. Spectators were asked about their spending, satisfactions levels, length of stay etc. Data collections were carried out by one of Denmark's leading opinion poll agencies, Epinion.

## 1.5.3 Calculation of number of individual visitors (attendees)

The total number of spectators attending the Championships over the six days the event took place was estimated by the organizers of the event together with the Danish police at approximately 545,000 spectators (attendances) in total, distributed as follows:

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<sup>&</sup>lt;sup>2</sup> Displacement effects in terms of events can happen when a large scale event like the Championships occurs at the expense of other forms of tourism i.e. ordinary leisure or business tourism to the region, either because visitors decide to stay away due to the event taking place, or because accommodations are fully booked. This type of situation, where tourism activities simply substitutes one form of expenditure and economic activity for another, is known as the *displacement effect*.

Monday 19<sup>th</sup> September: 30,000 Tuesday 20<sup>th</sup> September: 25,000 Wednesday 21<sup>st</sup> September: 100,000

Friday 23<sup>rd</sup> September: 60,000 Saturday 24<sup>th</sup> September: 80,000 Sunday 25<sup>th</sup> September: 250,000

The two biggest event days were no doubt Wednesday 21<sup>st</sup> and Sunday 25<sup>th</sup> were the Time trial Elite Men and Road race Elite Men, respectively, took place.

In order to find the number of non-local Danish spectators and international spectators, local spectators were deducted from the total number of spectators. The split between local and non-locals set to 60%

were based on experiences from similar impact studies of sport events, e.g. Challenge Copenhagen 2010 (triathlon) in Copenhagen (furthermore see box 'Deviation from the sample'). A further deduction was made based on the results from the sample of spectators whose stay in the region was not primarily due to the event – i.e. spectators who happen to be in the region anyway. Deducting locals and spectators not in the region primarily due to the event took the number of spectators (attendance) to approximately 203,000.

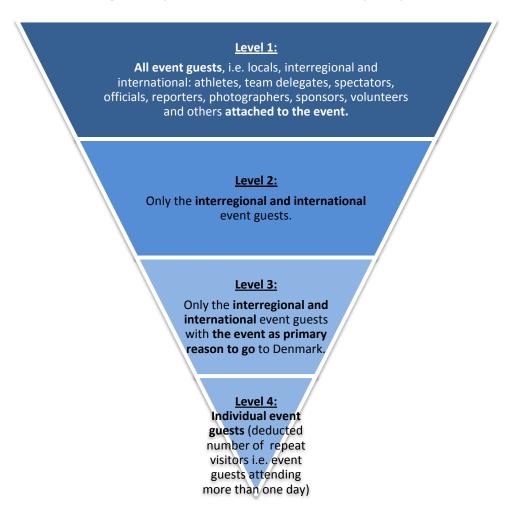
Based on findings from the sample regarding length of stay, further calculations were conducted to establish the number of <u>individuals</u> (attendees) by deducting number of overnight <u>repeat visitors</u> (i.e. spectators attending more than one day) among the 203,000 spectators. One day Danish and one day International visitors were estimated to have attended the event respectively two days and one and a quarter days on average, based on findings from other similar studies of events and indications from the organizers of the event.

#### Deviation from the sample

It has in two instances been necessary to deviate from the results from the sample. This concerns the split between locals and non-locals and the split between international spectators with or without overnight stays. In both instances the split has reduced the effects of the event. This is done due to a weakness in the sample, which has resulted in a unrealistic high number of international bed night generated by the event, compared to the actual official bed night statistics for the period. These downgrades were done after consulting the Hotel and Restaurant Association, HORESTA.

Based on the above assumptions and findings from the sample, the total number of attendees was established to be approximately 102,000 individual non-local and international spectators (including the 768 media representatives and the 3,000 riders and other delegates). See also Figure 1 below 'Scope funnel'.

Figure 1 'Scope funnel' - 2011 UCI Road World Championships



# 1.5.4 Calculation of the tourism economic turnover and impacts

The tourism economic turnover is limited to income from foreign visitors and non-local Danes. Our calculation is based on the number of spectators (attendees), media representatives and delegates (riders and trainers etc.), their length of stay and spending. Details about the delegates as well as number of media representatives were obtained by the organizers. The media representatives' length of stay and spending were obtained from the media survey. The number of spectators (attendees) was calculated as described above and their length of stay and spending were based on the sample.

When calculating the macro economic impacts the "Tourism Economic Impact Measurement of Sports-., Cultural- and Business Events, 2011" guidelines and model has been used. This model is based on the socio-economic input-output model, LINE, which is operated jointly by VisitDenmark, Danish Enterprise and Construction Authority and The National Labour Market Authority.

# **Chapter 2: Spectator survey**

# 2.1 Introduction and methodology

Chapter two of the report contains the results of the spectator survey. The spectator survey was conducted among a representative sample of spectators attending the Championships. In all, 349 face-to-face interviews of <u>non-local and international visitors</u> were conducted on Wednesday 19<sup>th</sup> and Sunday 25<sup>th</sup> September – the two biggest event days in terms of spectators. Local spectators (spectators living in the Capital Region of Copenhagen) were not included in the survey. Spectators were asked about their spending, satisfaction levels, length of stay, motivations etc. Data collections were carried out by one of Denmark's leading opinion poll agencies, Epinion. For further information on methodology see section 1.5.2 in chapter 1.

# 2.2 Summary and conclusions – Spectator survey

Overall non-local and international spectators were satisfied with the Championships and their stay in the Capital Region of Copenhagen: The main conclusions are summarized below:

- Profile of the spectator. The typical visiting UCI Road World Championships 2011 guest was a 39 year old man, staying on average 3.5 days in a hotel in Copenhagen, and spending on average between 1.080 DKK (145 Euro) and 1.781 DKK (239 Euro)
- **Most Danish spectators.** Overall, most spectators by far came from Denmark. After deducting local spectators, Denmark was still the biggest source markets, followed by Norway and Sweden.
- TV/Radio was the main source of information. Most spectators heard and gained information about the event via TV/Radio' (43%), followed closely by 'newspapers' (39%). 'Friends and/or family' (38%) were the third most used source for knowledge and information.
- Cycling the prime motivation for attending the event .The majority (76%) of all spectators stated their interest in cycling as the prime motivator for attending the event. The majority of spectators are furthermore (leisure) cyclists themselves (65%).
- Side events are not of great significance. Almost half of the spectators were aware of the side events and activities taking place in Copenhagen and Rudersdal, but they are not of great significance to their overall experience and evaluation of the event.
- **High satisfaction levels among spectators.** Generally the spectators were overall very satisfied with the hosting of the Championships. As many as 83% were overall 'very satisfied' or 'satisfied' with the Championships. Spectators were particular please with the atmosphere during the event.
- The Capital Region is perceived as an attractive destination. And an important factor in the spectators' decision to attend the event. 73% of the spectators (both non-local Danish and

International) stated that Copenhagen being the host destination had influenced them 'to a <u>very high or high degree'</u> in their decision making process.

• The Capital Region was a good host. The Capital Region succeeded in being a good host for the majority of the spectators. 84% stated that they were overall 'very satisfied' or 'satisfied' with their stay in the Capital Region of those who answered the question.

# 2.3 Profile of spectator

#### The Championships were most appealing to younger men

Notably but perhaps not surprisingly, more men (69%) than women (31%) attended the Championships. In terms of age it seems that the Championships were particularly appealing to the younger segment 28% were between 15 and 25 years old, but also the age group between 46 and 55 years was greatly represented with 21%, followed by the age group 56+ years with 19%. The average age was approximately 39 years.

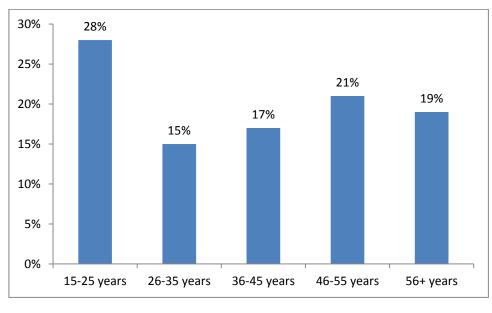


Figure 2 Age distribution of visiting spectators

N= 349

## The Championships had great international appeal

This was reflected in the nationality distribution of spectators attending the event:

- Norway was not surprisingly the biggest international source market. Many Norwegians traveled to
  Denmark to show their support to the Norwegians cyclists Thor Hushovd and Edvald Boasson
  Hagen, resulting in 17% of all visiting spectators being from Norway.
- Sweden was the second biggest international market, followed by Belgium 5.2% and Finland 2.3%.

• The gold winner and Champion Mark Cavendish's home country, the UK, represented 1.1% of all visiting spectators.

The Championships were, however, also very appealing to both local people – approximately 60% of the spectators came from the Capital Region – and visiting Danes living outside the Capital Region. 61% of the visiting spectators came from Denmark. In total of all the 545.000 spectators approximately 83% (more than five persons out of six) of all spectators came from Denmark (local plus non-local Danes).

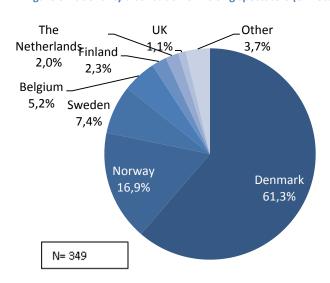


Figure 3 Nationality distribution of visiting spectators (ex. local spectators)

## Spectators had a fairly high average spending and length of stay

As stated in table 4 *Chapter 1 Tourism Economic impact analysis,* spectators staying overnight had a fairly high average daily spending:

- Average daily spending for non local Danish spectators was 1.080 DKK (145 Euro), and they stayed on average 3.5 nights.
- Average daily spending for international spectators was 1.781 DKK (239 Euro) with an average length of stay of 3.9 nights.
- Average daily spending for spectators not staying overnight was 274 DKK (37 Euro) for non-local Danish spectators, and 376 DKK (51 Euro) for international spectators.
- Average length of stay overall for all visiting spectators was 3.8 nights

30% 25% 20% 26% 15% 19% 10% 10% Avg. 3.8 days 8% 5% 5% 5% 2% 3% 1% 1% 3% 3% 2% 0% 1 2 3 4 5 6 7 8 9 10 11 Days N= 156 ■ Domestic bed nights Foreign bed nights

Figure 4 Average length of stay

### More than half of expenditures go to accommodation and restaurants

Restaurants, cafes etc. was the most important spending component, taking up as much as 40% of the total spending among all visiting spectators (including one-day visitors). The accommodation sector received 24%, which is fairly low compared to other similar studies. This is partly due to a large amount of spectators staying in private accommodation (24%) but also due to a large part (66%) of all visiting spectators being one-day visitors. 16% of total spending was spent on shopping, followed by transport (7%) and attractions/sightseeing (4% respectively). Looking <u>only</u> at spectators staying overnight, their average spending on accommodation accounted for 36% of their total spending.

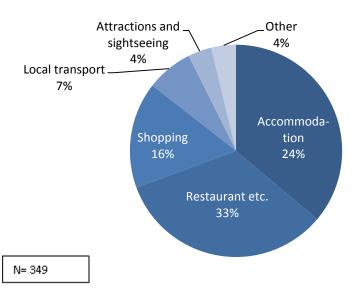


Figure 5 Spending by type of consumption

The 2011 UCI Road World Championships

#### Copenhagen was the preferred location for overnight stay

The majority of visiting spectators (82%) stayed overnight in <u>Copenhagen</u>, whilst 10% stayed in North Zealand, followed by 6% specifically in Rudersdal.

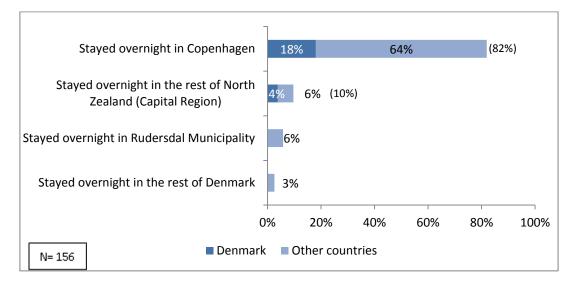


Figure 6 Location of accommodation

## Hotels were overall the preferred choice of accommodation

More than half (52%) stayed in a hotel, the second most used form of accommodation was 'staying with friends and relatives' (19%). Almost one in five stayed with 'friends and relatives'. Particularly international spectators stayed in hotels or other forms of commercial accommodation (89% of all international spectators), whilst mainly Danish non-local spectators stayed with 'friend and relatives' (47% of all visiting non-local Danish spectators).

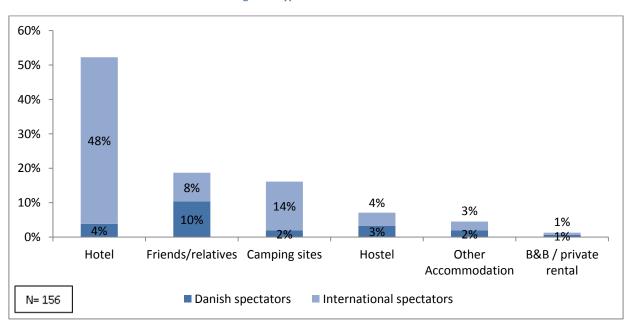


Figure 7 Type of accommodation

# 2.4 Inspiration and motivation

#### Most spectators heard and gained information about the event via TV/Radio

The event was heavily represented in the media both prior, during and after the event (see also the Media Analysis Chapter 5), hence, not surprisingly 'TV/Radio' (43%) was the prime source for knowledge and information gathering about the event, followed closely by 'newspapers' (39%). 'Friends and/or family' (38%) were the third most used source for knowledge and information gathering about the event.

11% of all spectators stated 'Social media' as a prime source of information. Almost as many (10%) stated that they *like* UCI Road Championships on Facebook, of these 21% stated that Facebook had contributed to them being at the event today. 10% of spectators equals 9,800 individual spectators, hence 9,800 individuals should be *likers* on Facebook - this is, however, slightly over the actual number of 'Facebook likers' which is 7,500 individuals.

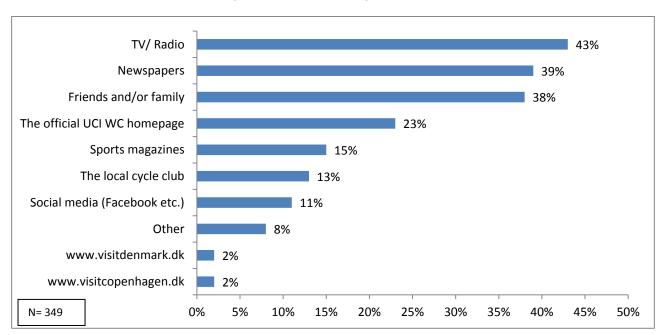


Figure 8 Sources of knowledge information

#### Great interest in cycling was the prime motivation for attending the event

The majority (76%) of all spectators stated their interest in cycling as the prime motivator for attending the event. The high interest in cycling as a prime motivator is more or less the same whether you are a Danish spectator (74%) or an international spectator (78%). However, there were some nationality based differences among the prime motivation factors:

- Not surprisingly, more Danish spectators (64%) stated that they did not want to miss out on the opportunity to attend this big event compared to International spectators (43%).
- Considerably more International spectators (42%) are a member of a cycling club compared to the Danish spectators (14%). Presumably this is because the longer you travel to attend the event, the higher the interest and hence likelihood of being a member of a cycling club.

• 20% of International spectators knew someone who participated in the races compared to 8% of Danish spectators.

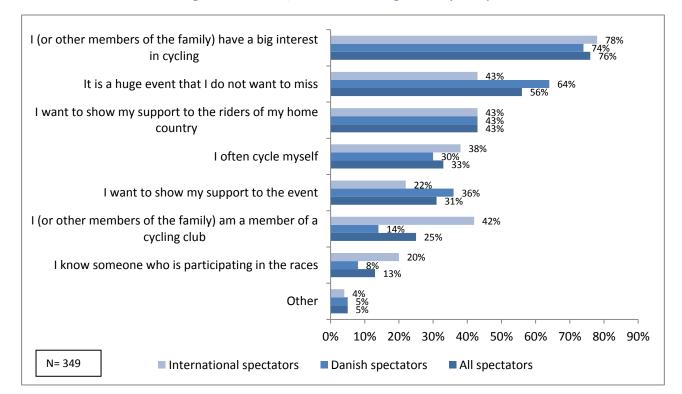


Figure 9 Motivations/reasons for attending the Championships

## Eating at restaurant etc. and going shopping were popular activities during the visit to the region

In total 41% of all visiting spectators only attended the cycling races and did no other activities, whilst in the region. Of these the majority were Danish one-day visiting spectators. Of the remaining, however, the main activity, besides attending the event, was going to restaurants etc. (75%), followed by shopping (43%). (Note one activity does not exclude the other).

In general, international spectators were more "active" than Danish spectators, apart from visiting 'friends and family' where the Danish spectators outnumbered the international spectators.

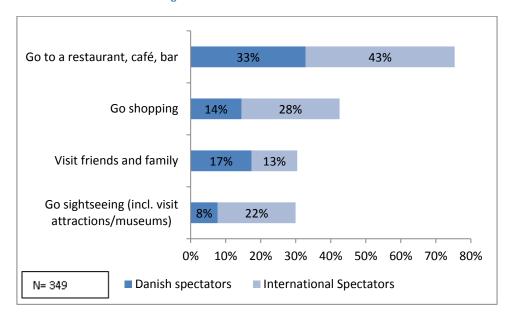


Figure 10 Activities on the destination

# 2.5 Cycling behavior among spectators

#### The majority of spectators are cyclists themselves

Approximately two out of three spectators (non-locals and international spectators) use their bike on a daily basis either to go to work and/or as a form of exercise. However, there are some nationality based differences, which emphasize the Danes' tradition for using bikes as a means of transport:

- 43% of the visiting Danish spectators use their bicycle to work/shopping, compared to 21% of the International spectators. (Note: this is not including locals findings from other studies show that more than 50% of Copenhageners use their bike to work all year round).
- 33% of the Danish spectators use their bike as a form of exercise, compared to 28% International spectators
- Almost every 4th spectators are a member of a cycling club, however, only 13% of the Danish spectators but 41% of the International spectators.

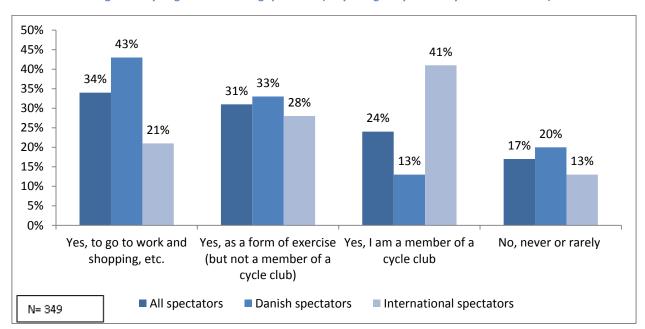


Figure 11 Cycling behavior among spectators (Do you regularly exercise yourself on a bike?)

17% of the spectators stated that they never or rarely exercise themselves on a bicycle, of these 56% stated that they previously used cycling as a form of exercise. As a reason to why they were no longer using cycling as a form of exercise, 29% stated "found other forms of exercise", followed by "too inconvenient" and "I am getting too old". No one stated "due to the weather".

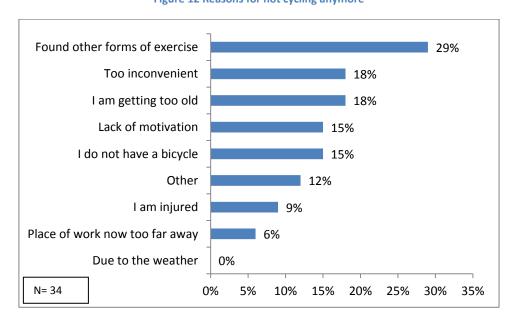


Figure 12 Reasons for not cycling anymore

# 2.6 Significance of side events

#### The Championships are the primary attraction - side events are of somewhat less importance

Almost half of the spectators are aware of the side events and activities taking place in connection to the Championships, but they don't seem to be of great significance to their overall experience of the event. Nevertheless, there are signs that the side events are important to some.

- In total 43% of spectators are aware of the side activities taking place in Copenhagen and Rudersdal in addition to the Championships. 55% are not aware of the side events and 2% don't know.
- The awareness is greater among the Danish spectators (non-locals) (46%) than among the foreign spectators (38%).
- A greater proportion, however, of the foreign spectators who knows about the side events (27%) are planning to attend the side events compared to the Danish spectators who knows about the side events (18%).
- 32% of all spectators found it 'very important' or 'important' to their overall experience that side events are offered alongside the main event. Slightly more (35%), however, found it unimportant or not important at all. 25% stated 'neither/nor'. There were no significant nationality based indifferences.

Compared to other similar sport events both the level of awareness and level of attendance is somewhat lower. In the case of the Challenge Copenhagen triathlon competition held in Copenhagen in 2010, 82% of the Danish spectators and 90% of the international spectators were aware of the side events attached to this event. And of the Danish and international spectators 39% and 32% respectively attended the side events. Other studies show similar or even higher levels of awareness and attendance in side events e.g. World Championships in wrestling, held in Herning in 2009.

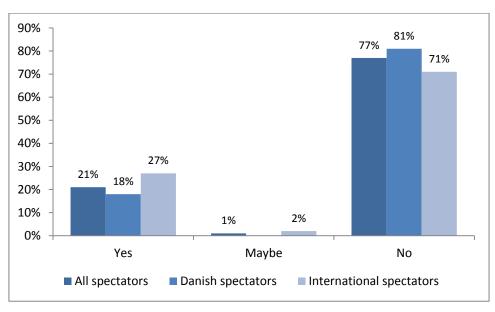


Figure 13 Intentions to participate in the side events

N= 150

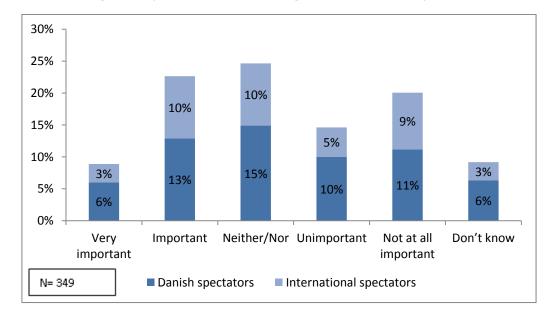


Figure 14 Importance of side events being offered to the overall experience

### 2.7 Evaluation of the event

### Very high satisfaction levels with the Championships

Generally the spectators are overall very satisfied with the hosting of the Championships. As many as 83% were overall 'very satisfied' or 'satisfied' with the Championships. There were no significant nationality based indifferences in the answers, although the Danish spectators were slightly more dissatisfied (14% very dissatisfied) compared to the international spectators (10% very dissatisfied/dissatisfied).

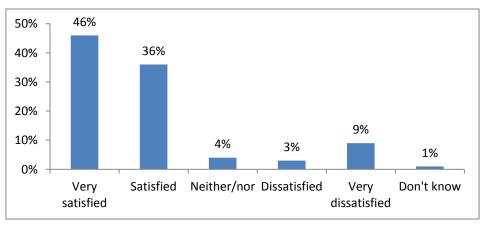


Figure 15 Overall satisfaction levels among spectators with the Championships

N= 349

In the figure below, the level of satisfaction is shown with regards to a number of activities or services offered in connection to the Championships. It is the percentage of spectators being 'very satisfied' or satisfied' that is displayed in the figure. Below some highlights from the results

- The actual atmosphere scores the highest with as many as 79% of all spectators being 'very satisfied' or 'satisfied with the atmosphere at the Championships.
- 75% of respondents were 'very satisfied' or 'satisfied' with the signage in general and accessibility to the races, which is a very high score compared to Sport Event Denmark's earlier impact studies
- Safety along the routes also scored fairly high with 73% of respondents being happy with this service.
- In the other end of the scale, it seems that the respondents are least satisfied with the side events and activities taking place in connection to the Championships. Only 27% of respondents are 'Very satisfied' or 'satisfied' with the side events in Rudersdal. However, this does not mean that a large percentage are unsatisfied, but merely because a large percentage (64%) has stated 'neither /nor' whilst only 9% is 'very unsatisfied' or 'unsatisfied'. This is also partly the case in terms of the bicycle festival in Copenhagen, where 33% said 'neither/nor' and 14% said 'very unsatisfied' or 'unsatisfied'.
- However, in terms of hot spots along the routes (big screens) as many as 42% were 'very unsatisfied' or 'unsatisfied'. Also information regarding the races has a fairly large proportion (23%) of unsatisfied spectators.
- In general, it seems that Danish spectators are more satisfied than the International spectators. This is the case in 8 out of 12 of the products/services listed. This contrary to the overall satisfaction level where the Danish spectators were slightly more dissatisfied.

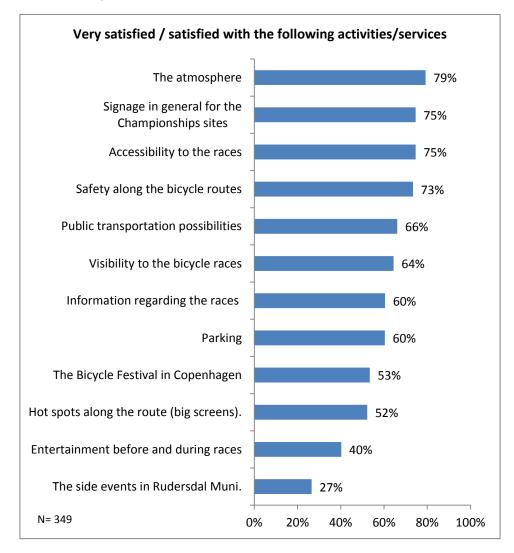


Figure 16 Satisfaction levels with a number of activities and services

# 2.8 Perception of the Capital Region of Copenhagen

# Copenhagen as main 'reason to go'

Despite the facts that the prime motivator for coming to the Championships as stated earlier is the spectators' interest in cycling, the Capital Region also is an attractive destination for the non-local spectators and an important factor in their decision to attend the event.

- Half of the spectators stated that it had influenced them 'to a very high degree' that the event took
  place in the Capital Region of Copenhagen. A further 24% stated it had influenced them to 'a high
  degree', and 12% to 'some degree'.
- There were no significant nationality based differences. The Capital Region as a host destination played a positive role for both Danish (non-locals) and international spectators. However, it must be assumed that the Danish (non-local) spectators partly found it appealing, that the event was held in the Capital region, due to ease of assess.

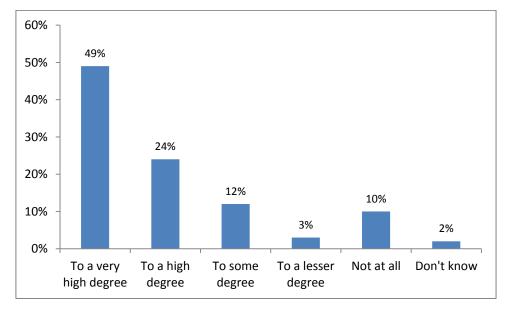


Figure 17 The host destinations' influence on the decision to attend the event

N= 150

#### The Capital Region and Copenhagen satisfied the majority of spectators

The Capital Region succeeded in being a good host for the majority of the spectators. Satisfaction levels with the host destination were just as high as the satisfaction levels with the Championships.

- 84% stated that they were overall 'very satisfied' or 'satisfied' with their stay in the Capital Region.
- Danish spectators were more satisfied than the international spectators. 89% Danish spectators stated that they were 'very satisfied' or 'satisfied' compared to 77% of the international spectators.
- A rather large group of in total 22% stated either 'not relevant' or 'don't know'. It was particular among the Danish spectators (20%) that the 'not relevant' respondents were found. Likewise it was particular among the international spectators that the 'don't know' group was found. Note: in the table below 'don't know' and 'not relevant' has been deducted)
- It is believed that the spectators that stated either 'not relevant' or 'don't know', must have assumed that they had to have stayed overnight to be able to answer the question. Or they did not feel that they had spent enough time in or had enough knowledge about the destination to answer the question.

50% 43% 45% 41% 40% 35% 30% 25% 20% 15% 8% 10% 4% 3% 5% 0% Satisfied Neither/nor Dissatisfied Very dissatisfied Very satisfied

Figure 18 Overall satisfaction levels with the host region (deducted 'don't' know' and 'not relevant')

N= 272

# **Chapter 3: Media segment survey**

#### 3.1 Introduction

Traditionally, the UCI Road World Championships attract a huge number of press people, which was also the case in Denmark 2011.

As many as 768 media people visited Denmark, many of them journalists and photographers from influential sports media, experienced in covering UCI Road World Championships and cycling events of this calibre. Of the 768 individuals, 275 were from Denmark and almost 500 from abroad (=64%).

The medias voice and the message they spread about Denmark is important to react to if Denmark want to maintain its position as one of the world's leading sports events destinations; especially as the competition Denmark is up against in the market is becoming more and more fierce.

The media analysis addresses issues such as:

- Which nations do the media come from? And if the media come from abroad, have they been in Denmark before?
- Do they stay overnight in Denmark, and if so, where and for how long? And how much money do
  they spend on accommodation, food and drinks, shopping etc.? Do they go shopping and /or
  sightseeing?
- Do they have other journalistic tasks than reporting from the bike races?
- Which channels do they use to keep updated on the event?
- Can they name any of the official partners/sponsors of the event?
- How do they evaluate the Danish hosting (compared to other previous hosts)?
- Which three words would they use to describe Denmark/the Danes <u>before</u> their visit? And which three words would they use to describe Denmark/the Danes after their visit?
- Would they have preferred to have the questionnaire of this survey on mobile/e-mail?

# 3.2 Summary and conclusions – Media segment survey

The media representative at the UCI Road World Championships 2011 in Denmark were very satisfied with their event stay in terms of six out of seven parameters and moderately satisfied with the 7<sup>th</sup> parameter – food and drinks in the media working area.

Only 10% of the media representatives had other journalistic tasks than reporting from the races, but conversely the majority of them would go shopping and/or sightseeing (or had already gone) during their event stay.

The media people primarily stayed in hotels in Copenhagen, 7 days and nights on average, and their daily expenditure was almost 1,500 DK (=200 Euro).

The most frequently used information channels for the media to keep updated on the event were: <a href="https://www.copenhagen2011.dk">www.copenhagen2011.dk</a>, colleagues, and UCI's website.

The unaided sponsor recall is rather high; 8 of 10 media people are able to name one or more of the official partners/sponsors of the event (unaided); 1.8 on average.

The stay in the Capital Region has to a certain extent changed the way the international media would describe Denmark and the Danes in three words. Before the event the predominant words would be: beer, friendly and expensive, whereas post-event they were: biking nation, friendly, nice buildings/green.

Only 10% of the media would have preferred the questionnaire on their mobile.

# 3.3 Methodology – Media Segment Survey

During the event, 42 media representatives from 12 nations were interviewed face-to-face in the two press centres; one in the City Hall in Copenhagen and one in the Virum Hallen in Rudersdal. This is a small sample with the statistically uncertainties involved in cases of such a limited sample, but still it gives the reader a hint about the characteristics of the media segment at this prestigious cycling event.

The interviews in Copenhagen were conducted on 21<sup>st</sup> September and the interviews in Rudersdal on 25<sup>th</sup> September 2011. Twenty media representatives were interviewed in Copenhagen and 22 in Rudersdal.

The questionnaire was developed by Sport Event Denmark and Wonderful Copenhagen in English and included 27 questions in English.

The interviews were conducted by one of Denmark's leading opinion poll agencies, Epinion.

# 3.4 Key finding of the media segment survey

#### Profile of the media representatives:

- 12 nations are represented in the sample; the predominant part from Switzerland
- 36 of the 42 media people in the sample are international (86%)
- 6 of the 42 media people in the sample are from Denmark (14%), 3 from Copenhagen (locals)
- 3 out of 4 international media people have been in Denmark before
- 95% of the media people from outside the host region stay overnight in Denmark

#### Behaviour on the destination

- The media people from outside the host region spend on average 1,451 DKK (Euro 193) per day
- The media people from outside the host region, staying overnight in Denmark, stay on average in 1.05 different places
- The media people from outside the host region, staying overnight in Denmark, stay mostly in Copenhagen

- The media people from outside the host region, staying overnight in Denmark, stay on average 7 days and nights in Denmark
- Only 10% of the media people have other journalistic tasks than reporting from the races
- Each reporter use 4.55 information channels on average to keep updated on the event
- The predominant information channels are: <a href="www.copenhagen2011.dk">www.copenhagen2011.dk</a>, colleagues, and UCI's website
- More than half of the media people (52%) go shopping and/or sightseeing during their event stay and 10% consider to
- Shopping in Copenhagen is the most common leisure activity during their event stay

#### **Evaluation of event**

- The technical set-up of the two press centres is the parameter that the media people are the most satisfied with (out of seven parameters); as many as 9 out of 10 are quite or very satisfied with the technical set-up.
- The food and drinks in the media working area is the parameter that the media people are the least satisfied with (out of seven parameters); Well over half of the media people are satisfied with the food and drinks they get.

#### **Perception of Denmark**

- Before their stay in the Capital Region, the international media people would primarily use these three words to describe Denmark/the Danes: beer, friendly, expensive
- After their stay in the Capital Region, the international media people would primarily use these three words to describe Denmark/the Danes: biking nation, friendly, nice buildings/green

#### **Knowledge of sponsors**

• 8 of 10 media people are able to name one or more of the official partners/sponsors of the event (unaided); 1.8 on average

# **Chapter 4: Local populations survey**

#### 4.1 Introduction

Hosting major international sports events such as the 2011UCI Road World Championships in Denmark calls for a great deal of public funding.

As it is the local tax payers who indirectly contribute to the public investments, it is important to justify the funding to the local community by drawing their eyes to the many positive spin-offs of hosting major international sports events other than the macro-economic spin-offs.

This is what this part of the report is all about.

By addressing the issues below, the attitude of the local population is uncovered, not only to this UCI event, but also to major international sports events in Denmark in general, and event organisers are thus able to respond to this in the future.

To be more specific this chapter 4 of the report addresses these issues from a local citizen point of view:

- Knowledge of, attendance at and backing to the event
- Knowledge of and participation in the side-events
- Any nuisance due to the event, especially in terms of traffic congestion etc.
- Level of indulgence despite any (traffic) nuisance due to the event
- Satisfaction with the level of pre-event information from the organisers
- Any experienced positive implications of the event
- Level of pride in the hosting of the event
- Consensus (or not) about the positive spin-offs of hosting major international sports events

The data is cross-tabulated on:

- Age
- Gender
- Place of residence (zip code)

enabling the reader to see if a certain segment has other attitudes and preferences than the average citizen of the local community. See "Cross tabulation – main findings".

# 4.2 Summary and conclusion – Local population survey

In the run-up to the event, the project faced some criticism from the population and in the national media, especially in the two host municipalities, Copenhagen and Rudersdal. The profitability of hosting the event was questioned, and negative attitudes were expressed towards the inconvenience that the staging was likely to cause to the local community.

However, once the event had begun, the sentiment gradually turned to the better and eventually the event was permeated with great excitement.

The findings of the survey prove that the majority of the local citizens of both Copenhagen and Rudersdal:

- Fully knew about the event and were somehow affected by it
- Did not face any unacceptable traffic nuisance during the event
- Did not feel any unacceptable disturbance in their everyday life due to the event
- Did face only minor traffic nuisance during the event
- Felt that pre-event public information enabled them to adjust to the situation
- Felt that, taking into consideration the size of the event, the traffic nuisance was to live with
- Would like to attend (or had already attended) one or more of the races live
- Had heard about the additional side-events
- Would not take part in the side-events themselves
- Felt the event revitalised the city/region and would not be without it
- Felt the event was well-organised and professional
- Felt it was great that the event was staged in the Capital Region of Copenhagen
- Felt it is a plus for Denmark's international reputation to stage major sports events
- Felt it is important for the region to brand itself by hosting major sports events
- Felt it is important for Denmark to brand itself by hosting major sports events
- Felt proud that such a huge event as the Championships was hosted in the region

#### Main differences found between the sample in Copenhagen and Rudersdal, respectively:

- The respondents in Copenhagen have a younger profile than the respondents in Rudersdal
- Considerably more citizens in Rudersdal were somehow affected by the event
- Considerably more citizens in Rudersdal attended some of the races
- More citizens in Rudersdal felt the event was a nuisance to them, but at the same time they felt, just as much as the Copenhageners, that they could live with it, taking into consideration, the size of the event
- Considerably more citizens in Rudersdal felt that the pre-event information about the event and its consequences for the local community enabled them to adjust to the situation
- Considerably more citizens in Rudersdal felt that the event was well-organised
- Considerably fewer citizens in Rudersdal felt that the event was unprofessional
- Considerably more citizens in Rudersdal felt proud that the event was staged in the region
- Considerably more citizens in Rudersdal knew about the side-events
- Slightly fewer citizens in Rudersdal participated (or intended to participate) in the side-events
- Overall, the Copenhageners were positive and not affected by the attitude of the national media
- The citizens from Rudersdal were influenced by the attitude of the national media, but generally they are positive

# 4.3 Methodology – Local population survey

Between 20<sup>th</sup> and 29<sup>th</sup> September 2011 one of Denmark's leading opinion poll agencies, Epinion, collected 1,294 online responses totally from citizens in the Municipality of Copenhagen and the Municipality of

Rudersdal, respectively. The answers were collected among respondents in Epinion's online "Danmarks Panel". The respondents are representative for the 2 municipalities.

Specifically, 684 responses from Municipality of Copenhagen were collected and 610 from the Municipality of Rudersdal.

The questionnaire was developed or carried out by Sport Event Denmark and Wonderful Copenhagen in Danish and included 18 questions.

# 4.4 Survey of the local population in Copenhagen

## 4.4.1 Profile of local citizens in the Copenhagen sample (684):

### Age and gender

- 38% male, 62% female respondents
- Average age: 44
- The majority of respondents are >55 years
- 9% of the respondents are between 15-25 years
- 19% of the respondents are between 26-35 years
- 24% of the respondents are between 36-45 years
- 18% of the respondents are between 46-55 years
- 29% of the respondents are >55 years

# Place of residence

- Inner Copenhagen (zip codes 1000-1999) 17%
- Outer Copenhagen 83%

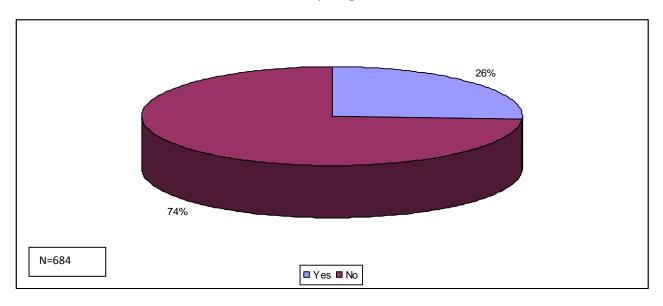
#### 4.4.2 Knowledge of and attendance at the event – Copenhagen

All respondents knew that the event would be staged/had been staged in Copenhagen between 19 and 25 September 2011.

Almost half of the local citizens (45%) were somehow affected by the event.

Every fourth of the local citizens in Copenhagen attended or had intentions to attend one or more of the races in the World Championships, ref. figure 19.

Figure 19 Have you attended (or do you intend to attend) any of the competitions/races at the 2011 UCI Road World Champions
- Copenhagen



#### 4.4.3 Attitudes towards traffic issues during the event - Copenhagen

It is not possible to stage such a huge event in a capital without inconveniencing the local population, which the organisers were fully aware of.

In order to meet some of the complaints that the organisers knew would be made by the local population they diverted the citizens to other means of transport than car well in advance and, in Rudersdal, arranged for alternative parking opportunities for the many inhabitants along the route.

As can be seen from figure 20, the organisers succeeded in getting away with the rerouting of the traffic thanks to among other things public information well in advance of the event.

In general, the nuisance in terms of traffic has been acceptable in 55% 10% 8% 8% the light of the size of this huge event Public information enabled me to adjust to the situation 39% 24% 15% 12% The nuisance due to the event in terms of traffic was limited 38% 25% 11% 7% 17% The event was an unacceptable nuisance to me in terms of traffic 5% 8% 11% 61% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% N=684 ■ I fully agree ■ I partly agree ■ Neutral ■ I partly disagree ■ I fully disagree

Figure 20 Level of agreement to pre-fixed statements about (traffic) nuisance

#### 4.4.4 Attitude towards the event - Copenhagen

As can be seen from figure 21, the attitude towards the event was very positive. 6 out of 10 local citizens fully or partly agree to the below pre-fixed positive statements about the event and also 6 out of 10 disagree with the only negative statement.

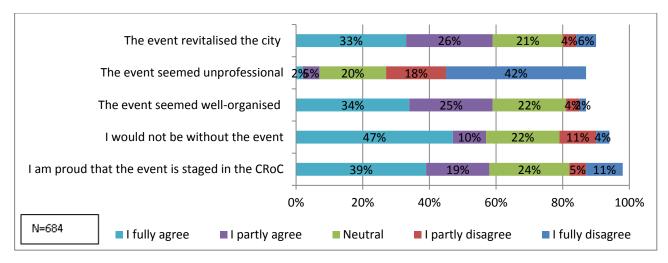


Figure 21 Level of agreement to pre-fixed statements about the event itself

As can be seen from the figure below, well over 6 out of 10 Copenhageners knew about the side-events.

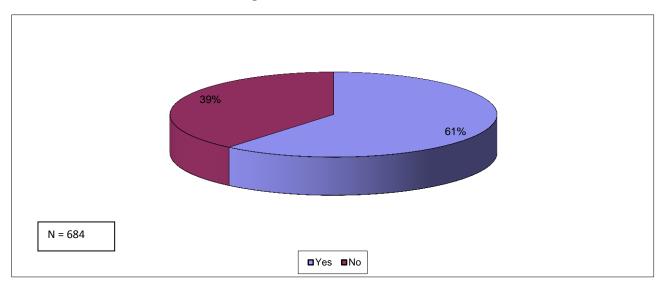


Figure 22 Awareness of side events

As can be seen from the figure below, every fifth of the Copenhageners, who knew about the side-events, participated (or had intentions to participate) in the side-events.

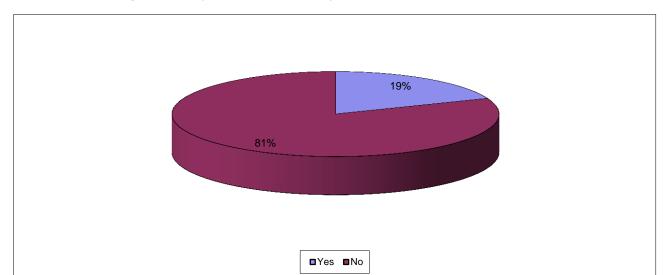


Figure 23 Participation in side-events (only the ones who knew about the side events)

# 4.4.5 Attitude towards hosting major sports events in Denmark – Copenhagen

As can be seen from figure 6, the overall attitude is extremely positive. 8 out of 10 citizens in Copenhagen either fully agree or partly agree to the pre-fixed statements that it is a plus for Denmark's reputation and important for both the host region and Denmark as such to brand themselves through the staging of major sports events.

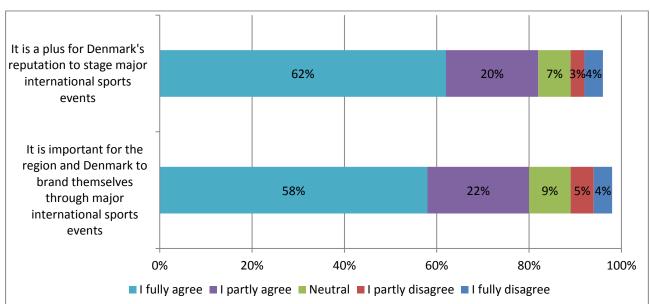


Figure 24 Level of agreement to pre-fixed statements about major sports events in Denmark, in general

N = 684

# 4.5 Survey of the local population in Rudersdal

#### 4.5.1 Profile of local citizens in the Rudersdal sample (610):

The figures in brackets below are the figures from the Copenhagen sample.

#### Age and gender

- 39% male (38%), 61% female respondents (62%)
- Average age: 50 (44)
- The great majority of respondents are >55 years
- 5% of the respondents are between 15-25 years (9%)
- 5% of the respondents are between 26-35 years (19%)
- 18% of the respondents are between 36-45 years (24%)
- 20% of the respondents are between 46-55 years (18%)
- 51% of the respondents are >55 years (29%)

#### Place of residence

- Holte (Finish at Geels Bakke, Holte), zip code 2840, 30%
- Other parts of Rudersdal 70%

#### 4.5.2 Knowledge of and attendance at the event – Rudersdal

All respondents knew that the event would be staged/had been staged in Rudersdal between 19 and 25 September 2011.

Almost 2 out of 3 local citizens were somehow affected by the event (64%).

Every second of the local citizens in Rudersdal attended or had intentions to attend one or more of the races in the World Championships, ref. figure 26.

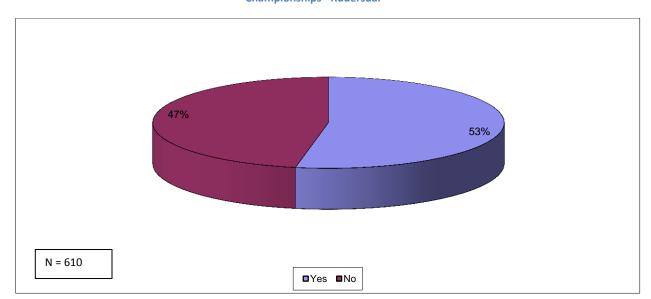


Figure 25 Have you attended (or do you intend to attend) any of the competitions/races at the 2011 UCI Road World Championships - Rudersdal

#### 4.5.3 Attitudes towards traffic issues during the event – Rudersdal

It is not possible to stage such a huge event in a capital without bothering the local population, which the organisers were fully aware of.

In order to meet some of the complaints that the organisers knew would be made by the local population they diverted the citizens to other means of transport than car well in advance and, in Rudersdal, arranged for alternative parking opportunities for the many inhabitants along the route.

As can be seen from figure 27, the organisers succeeded in getting away with the rerouting of the traffic thanks to among other things public information well in advance of the event.

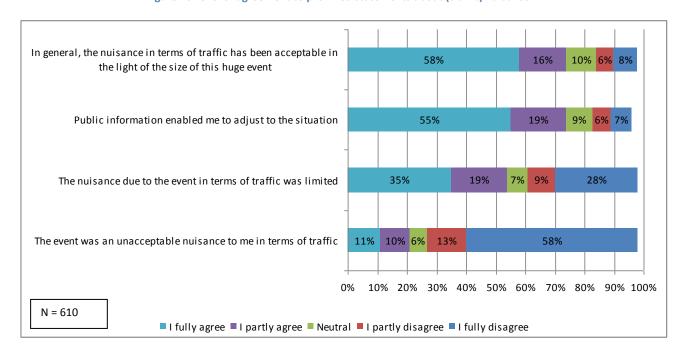


Figure 26 Level of agreement to pre-fixed statements about (traffic) nuisance

#### 4.5.4 Attitude towards the event – Rudersdal

As can be seen from figure 27, the attitude towards the event was very positive. More than 6 out of 10 local citizens fully or partly agree to the below pre-fixed positive statements about the event and 2 out of 3 disagree with the only negative statement.

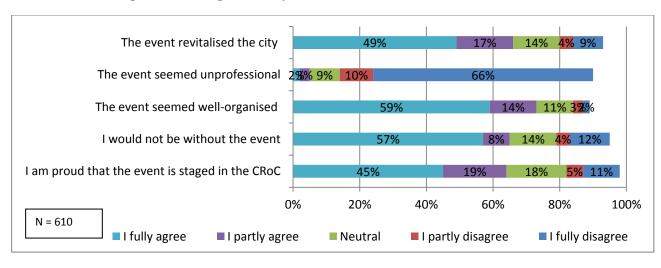


Figure 27 Level of agreement to pre-fixed statements about the event itself

As can be seen from the figure below, as many as almost 9 out of 10 local citizens in Rudersdal knew about the side-events.

12% 88%

■Yes ■No

Figure 28 Awareness of side-events

As can be seen from the figure below, every seventh local citizen in Rudersdal, who knew about the sideevents, participated or had intentions to participant in the side-events.

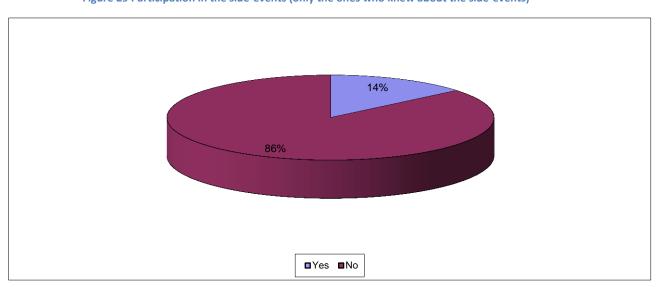


Figure 29 Participation in the side-events (only the ones who knew about the side-events)

# 4.5.5 Attitude towards hosting major sports events in Denmark – Rudersdal

As can be seen from the figure below, similar to the results of Copenhagen, the overall attitude is extremely positive. 8 out of 10 citizens in Rudersdal either fully agree or partly agree to the pre-fixed statements that it is a plus for Denmark's reputation and important for both the host region and Denmark as such to brand themselves through the staging of major sports events.

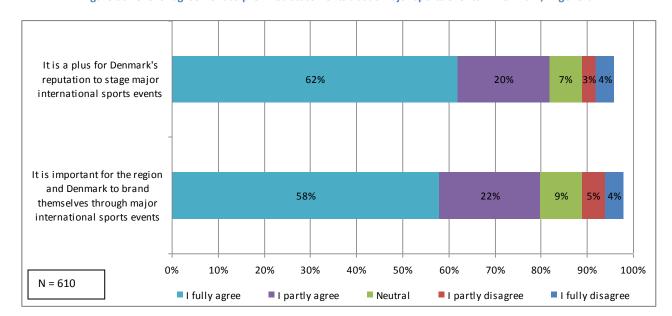


Figure 30 Level of agreement to pre-fixed statements about major sports events in Denmark, in general

As stated in the Main Conclusion – Local population survey" the project faced some criticism in the population and in the media, domestically, especially in the two host municipalities, Copenhagen and Rudersdal. The profitability of the hosting of the event was questioned, and negative attitudes were expressed towards the inconvenience that the staging was likely to cause to the local community.

To see if the local citizens, in general, were actually influenced by the negative pre-event attitude expressed in some media, a post-event comparison was made between the attitudes of the local citizens during the event period according to the sample and the media coverage in the same period.

Overall, the Copenhageners were positive and not influenced by the media as it appears from the figure 32, but it seems to be that the citizens from Rudersdal were influenced by the media, through still they were generally positive, as it appears from figure 33.

Figure 31 Positive/Negative Danish press coverage vs. local citizens' satisfaction levels during and just after the event

(1 and 2 = positive, 0 = neutral, -1 and -2 = negative)

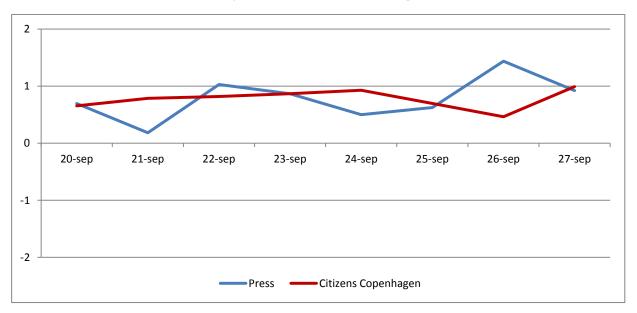
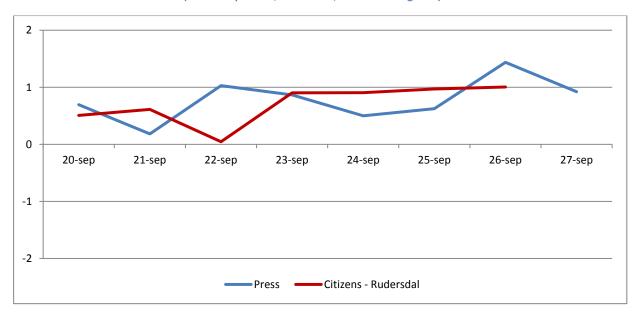


Figure 32 Positive/Negative Danish press coverage vs. local citizens' satisfaction levels during and just after the event

(1 and 2 = positive, 0 = neutral, -1 and -2 = negative)



# 4.6 Cross tabulations - main findings

In the sections below are summarized the main finding from cross tabulating the results with *age, gender* and place of residence (zip code).

#### 4.6.1 Main differences between local citizens by age

There are several differences between the age groups of the two samples. Apart from one aspect of the event in Rudersdal ("the event vitalized the region"), the youngest segment(s) are most unaware of the event, but most disturbed by it, and more neutral to its positive spin-offs. Conversely, the age group 36-45 years is the most positive towards the staging of the event in their region and towards major international sports events in Denmark/The Capital Region of Copenhagen, in general.

- The youngest two segments (15-25 years) and (26-35 years) were more unaware of the event than the other age groups
- The youngest segment (15-25 years) felt to a higher degree than the other age groups that the event was an unacceptable traffic nuisance
- The youngest two segments (15-25 years) and (26-35 years) felt to a less degree than the other age groups that pre-event public information enabled them to adjust to the situation
- The segment (36-45 years) felt to a higher degree than the other age groups that the traffic nuisance was to live with taking into consideration the size of the event
- The middle aged segment (45-55 years) attended (or had intentions to attend) one or more races live to a higher degree that the other age groups whereas the youngest segment (15-25 years) had the poorest intentions to
- The oldest segment (56+) tends to take part in the side-events to a less degree than the other age groups
- In Rudersdal, the youngest segment (15-25 years) felt to a higher degree than the other age groups that the event vitalised the city/region, whereas
- In Copenhagen, the oldest segment (56+) felt to a higher degree than the other age groups that the event vitalised the city/region
- The youngest segment (15-25 years) felt to a higher degree than the other age groups that they were somehow affected by the event
- Compared to the other age groups, the youngest two segments (15-25 years) and (26-35 years) felt to a less degree that the event was well-organised
- Compared to the more mature age groups, the youngest two segments (15-25 years) and (26-35 years) felt to a higher degree that the event caused an unacceptable disturbance in their everyday life
- The segment (36-45 years) said to a higher degree than the other age groups that they would not be without the event and also that they are very positive towards the hosting of the event in the Capital Region of Copenhagen
- The segment (36-45 years) feels to a higher degree than the other age groups that it is important for the Capital Region of Copenhagen and for Denmark to brand itself by hosting major sports events. Also this segment is more proud that that such a huge event as the UCI RWC was hosted in the Capital Region of Copenhagen
- In Rudersdal, the oldest segment (56+) do not feel to the same degree as the other age groups that is a plus for Denmark's international reputation to stage major sports events

#### 4.6.2 Main differences between local citizens by gender:

There are only a few differences caused by gender in the two samples. Apart from one aspect of the event in Rudersdal ("the event vitalised the region"), men are more engaged in the event and more positive towards the hosting of the event in their region

- More men than women attended (or had intentions to attend) one or more races live
- Slightly more men than women attended (or had intentions to attend) one or more of the sideevents in connection to the Championships
- More women than men in Rudersdal felt that the event vitalised the city/region
- More men than women in Copenhagen fully agreed that the event was well-organised
- More men than women in Copenhagen would not be without it (women more neutral)
- More men than women are very positive towards the hosting of the event in their region

#### 4.6.3 Main differences between local citizens by place of residence (zip code):

There are a few differences in attitude and behaviour between the citizens in the areas that are most influenced by the staging of the event. This goes for both samples, but especially for the Rudersdal sample. Not surprisingly, the citizens in the areas that are most influenced by the staging of the event were more bothered by the traffic congestion and rerouting etc. of the event than the other citizens in the region, which - especially in Rudersdal - seemed to (negatively) influence the level of satisfaction with the event and pride in hosting the Championships in their region

In Rudersdal, local citizens from Virum (zip code 2830) showed a different attitude and behaviour in some areas:

- They experienced the trouble due to the event as worse than the citizens in the other cities of the host region and that the event was a disturbance in their everyday life
- They felt to a less degree than the citizens in the other cities of the host region that they would not have been without it
- They are positive, but less positive than the citizens in the other cities of the host region that the Championships are held in their region
- They agree, but to a less degree than the citizens in the other cities of the host region that it is a plus for Denmark's international reputation to stage major sports events
- However, they agree to the same extent as citizens in the other cities of the host region that it is
  important for Denmark and for the Capital Region of Copenhagen to brand themselves by hosting
  major sports events
- As to the Road World Championships 2011 itself they are less proud than the citizens in the other cities of the host region that the event is hosted in their region
- Together with the citizens from Holte (zip code 2840) they, however, attended the Championships live to a higher extent than the other local citizens.

In Copenhagen, local citizens from the areas most troubled by the derouting of traffic etc. (=Inner Copenhagen) showed a slightly different attitude and behaviour in a couple of areas:

- They felt to a higher degree than the citizens in the other cities of the host region that the event was a disturbance in their everyday life
- They felt to a slightly less degree than the citizens in the other cities of the host region that, taking into consideration the size of the event, the traffic nuisance was to live with

# **Chapter 5 Media coverage analyses**

This part of the report looks at the overall media coverage of the Championships. The section includes a TV analysis (Section 5.1) based on an analysis carried out by IFM on behalf of UCI and two press analyses; one of the Danish press (section 5.2) and one of the international online press (section 5.3), both carried out by Wonderful Copenhagen.

# 5.1 TV analysis – key findings

A TV analysis of the Championships was carried out by IFM and the following findings are based on this analysis. The IFM analysis can be required in its total length by contacting Wonderful Copenhagen.

The TV analysis includes preliminary results<sup>3</sup> as not all results were collected at the time of writing this Evaluation Report. The period monitored was from 19<sup>th</sup> September to 28<sup>th</sup> September 2011 plus selected subsequence coverage. The key findings are summarized below and in table 6:

- The total broadcasting time for the Championships was 410 hours and 26 minutes.
- The accumulated audience of the Championships came up to 206 million TV viewers, most of
  them attracted by German news magazines (42.3 million). It should be noted that big countries like
  for instance China, the USA, South America and New Zealand who participated with a number of
  talented riders. Had these countries been included, the TV exposure would no doubt have been
  higher in all areas.
- The highest audience rating for a live broadcast was measured on *France 3* during the men's final road race competition (0.70 million).
- The most valuable live broadcasts in total were aired by Eurosport Pan Europe with an *IFM Event index* <sup>4</sup> of 46 points (coverage of 31 hours, audience 3.8 million).
- The most extensive coverage was for the Pan Asian Eurosport-feed (71 hours and 30 minutes), including live broadcastings of both the female, male and junior competitions.
- The IFM Event Index reached 163,295 points. Three countries with comparable low TV-viewers in total generated remarkable media values: *Belgium, The Netherlands and Denmark together generated almost a third of the total index value*. Looking at Belgium and the Netherlands, these high media values (19,437 and 14,495 point respectively) can very well be counted as an indicators for the traditional significance of road cycling in the Benelux-markets.

<sup>&</sup>lt;sup>3</sup>According to IFM analysis a list of TV coverage from the European Broadcasting Union is not included in the TV coverage analysis. A higher number of TV viewers are expected to be reached with the inclusion of this list; however, at the time of writing this list was not accessible.

<sup>&</sup>lt;sup>4</sup> The IFM index expresses the media value by combining broadcasting time and cumulated audience on a program-by-program basis.

Table 6 TV exposure - key findings

| TV Exposure   |                                   |                               |   |                                    |                                |                                 |
|---|-----------------------------------|-------------------------------|---|------------------------------------|--------------------------------|---------------------------------|
| Number of<br>Countries<br>reporting of the<br>event | Broadcasting<br>Time<br>(h:mm:ss) | Actual Playing Time (h:mm:ss) | Share of Actual<br>Playing time on<br>Broadcasting Time | Cumulated<br>Audience<br>(million) | IFM Event<br>Index<br>(points) | Number<br>of Live<br>broadcasts |
| 14  | 410:26:02                         | 389:37:25                     | 94,9%   | 205,56                             | 163,259                        | 104                             |

#### **5.1.1 Countries and regions monitored**

The following countries in alphabetic order were included in the report: Australia, Austria, Belgium, Denmark, France, Germany, Italy, The Netherlands, Pan Asia, Pan Europe, South Africa, Spain, Switzerland, UK as well as some global feeds e.g. Gillette World Sports. See appendix 1 for an overview of the countries monitored and the overall results.

It should be noted that big countries like for instance China, the USA, South America and New Zealand who participated with a number of talented riders. Had these countries been included, the TV exposure would no doubt have been higher in all areas.

#### 5.1.2 Trend analysis

TV exposure of the UCI Road World Championships was monitored by IFM previous years as well and a trend analysis based on the period 2007 – 2011 is illustrated in the graph and table below. As can be seen from the graph 'Broadcasting Time' of the Championships in Copenhagen were the highest in the period monitored only exceed by the Championships in Geelong in Australia last year. In terms of 'Accumulated Audience', however, the 2011 Championships' accumulated audience was higher.

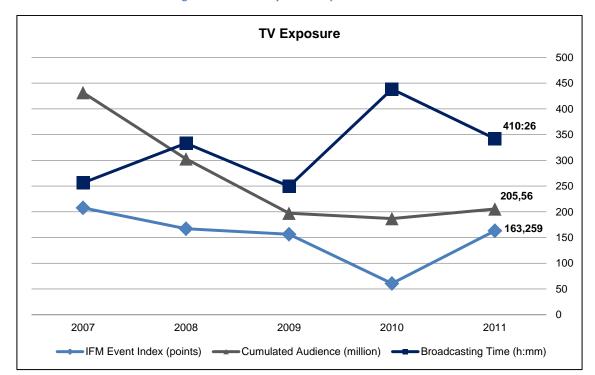


Figure 33 Trend analysis - TV exposure 2007 - 2011

| Season | IFM Event Index<br>(points) | Broadcasting Time<br>(h:mm:ss) | Cumulated Audience<br>(million) |
|--------|-----------------------------|--------------------------------|---------------------------------|
| 2007   | 207,747                     | 307:37:48                      | 431,60                          |
| 2008   | 167,100                     | 399:46:39                      | 302,94                          |
| 2009   | 156,418                     | 299:30:58                      | 197,21                          |
| 2010   | 60,671                      | 526:05:46                      | 186,84                          |
| 2011   | 163,259                     | 410:26:02                      | 205,56                          |

Base: 2011 UCI Road World Championships / Monitoring period: September 19 - 28, 2011 + selected subsequent coverage / monitored countries: Austria, Australia, Belgium, Denmark, France, Germany, Italy, Netherlands, South Africa, Spain, Switzerland, UK, Pan Asia, Pan Europe / source audiences: Eurodata TV / national institutes per country.

# 5.3 Danish media (print and online) analysis

#### 5.3.1 Introduction

The support of the Danish media was crucial to the event in order to secure a public acceptance in spite of the local traffic challenges, the mega event would cause in the heart of the Danish capital.

This part measures the national press coverage of the Championships, where the Danish press transformed from being mainly negative prior to the event to being overwhelmingly positive by the end of the event.

The report is based on quantitative analysis of printed and online articles in the largest Danish media organisations. A Power Point based presentation of the analysis has, furthermore, been developed. This press analysis presentation which is in Danish, is not included in this report, but can be obtained by contacting Wonderful Copenhagen.

#### 5.3.2 Summary and conclusions – Danish media

- Negative press start: In the week leading up the 2011 UCI Road World Championships, the picture presented by the Danish media was predominantly one of a capital whose streets were closed and gridlocked with traffic jams and chaos. When the starting pistol was fired on Monday 19<sup>th</sup> September, newspaper headlines continued to focus on traffic problems, with headlines such as, 'Traffic Chaos Hits Copenhagen', and 'World Road Racing Championships Close Copenhagen'.
- **Positive change:** By the Championships' second day, the tone had begun to change; newspaper headlines continued to have a critical tone, however, the main body of the articles was more often neutral or positive. Various participants, sportsmen, representatives of the local council and politicians were asked their opinion and, despite the traffic problems, they were mainly positive.
- **Hooray:** When the Championships moved to the streets of Rudersdal, the press coverage changed and the event was heralded with headlines such as, 'Hooray For The World Championships', and 'Denmark Takes The World By Storm'.

#### 5.3.3 Methodology – Danish media analysis

A search in Infomedia A/S, the leading Danish provider of media intelligence database, using the words: 'World Cycling Championships\*' resulted in a total of 914 articles for the period 1<sup>st</sup> August to 1<sup>st</sup> October 2011. In addition to that the analysis also covers 105 articles for the period 1<sup>st</sup> June to 31<sup>st</sup> July 2011 as seen in appendix 2. All the articles were screened based on an assessment of their relevance in terms of themes covered and stakeholders quoted. 438 articles were discarded due to lack of relevance. The remaining 476 articles were analyzed in depth, by categorizing them according to:

- Name and type (print/web) of media
- Themes ( main- and sub-themes)
- Stakeholder and sources named and quoted.
- Evaluation of content (positive, neutral or negative approach to the World Championships).

The analysis, furthermore, included a qualitative analysis of 11 of the largest Danish media organisations' coverage of the Championships. These included; Politiken, Berlingske, Jyllands-Posten, Ekstra Bladet, Urban, Metro Express, 24 timer, BT and Børsen, together with DR.dk and TV2.dk. Some examples of online articles are shown in appendix 3.

#### 5.3.4 Main findings of the Danish media analysis

The main findings of the analysis of the Danish press coverage of the World Championships are listed below:

#### • Negative World Championships start

Both prior to, and at the start of the event, the Danish press focused on the negative aspect of traffic chaos, and the concern that Copenhagen's ongoing Metro construction and road works would give an unfortunate impression of the capital to the many hundreds of millions of overseas TV-viewers. Towards the end, and in the days after the World Championships, however, the press coverage altered and became overwhelming positive. The focus shifted to the fact that the Championships had been a major success, a win for Denmark which could help to attract even larger events in the future.



Figure 34 Press coverage - tone (negative/positive) (N=914)

A sample of 914 articles were analysed and rated from +2 to -2, where +2 is very positive and -2 is very negative.

#### • Local citizens were positive

The somewhat chilly start on the part of the press apparently had little effect on the locals' attitudes to the Championships, who were, as stated in chapter 4, mainly positive and unaffected by the media throughout the event. The locals were mostly positive throughout the event both in Copenhagen and Rudersdal, according to the Population survey (described in chapter 4). The news criteria of the media's usual always includes conflicts and negative angels of a story, which somehow can explain that the negative press coverage didn't had any great effect on the local's attitude.

#### • Solid Danish coverage

The Danish media covered the Championships intensively before, during and after the event. In the period from 1<sup>st</sup> August to 1<sup>st</sup> October alone the event generated <u>914 articles</u> in 11 of the largest Danish print- and web media. The media coverage was especially intensive from 12<sup>th</sup> to 19<sup>th</sup> October with approximately 30 articles per day, and again from 19<sup>th</sup> to 25<sup>th</sup> October, with about <u>50</u> articles per day.

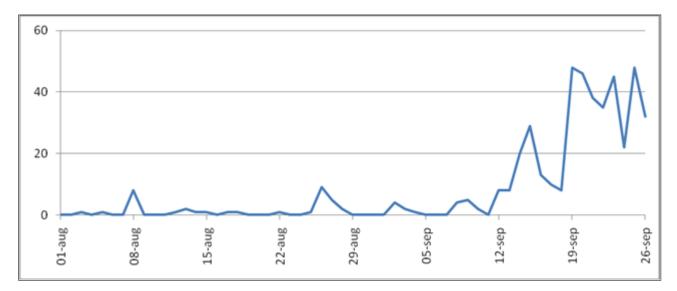


Figure 35 Number of articles per day from 1st August to 26th September (N=914)

#### • Multiple coverage

The media focused on a long list of different themes during its coverage of the Championships. The largest single theme was the event itself. The second largest was the traffic problem during the event, followed by the cycling festival, and the championships as a catalyst for tourism and the tourism economy. It was striking that traffic was the dominant theme prior to the event, while towards the end of the race it had completely disappeared.

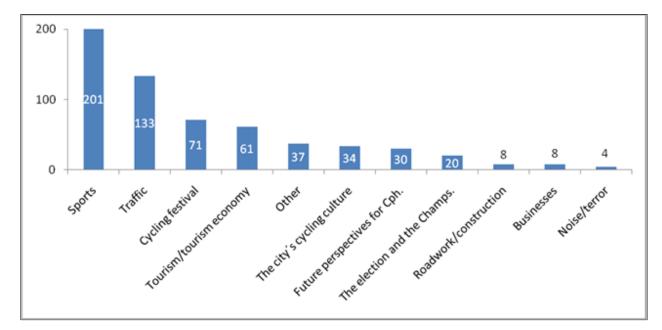


Figure 36 Most popular themes/topics (no. of articles)

#### • Many different stakeholders & spokesmen

Coverage of the Championships was characterized by many differing opinions from different partners. Together with Copenhagen Municipal Council, the Danish Cycling Federation was the most often cited source. Others were Sport Event Denmark; the Danish Cyclist Federation; the Municipality of Rudersdal; and Wonderful Copenhagen.

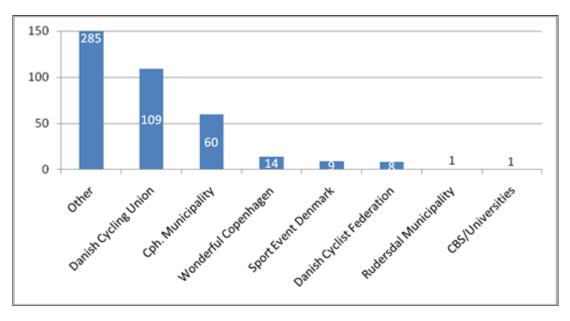


Figure 37 Stakeholders & spokesmen in the press (no. of articles)

#### • Politiken the most diligent newspaper

The newspaper Politiken had by far the most extensive coverage of the race, with 131 articles. Politiken was thus the media outlet with the greatest coverage of the Championships as a sporting event, and can therefore, according to this analysis, be considered Denmark's largest cycling newspaper. Surprising perhaps as Politiken is not normally considered a 'sporting newspaper'. Ekstra Bladet came in second place, with 60 articles. Web media overall wrote considerably more about the Championships than print media, both prior to and towards the end of the event.

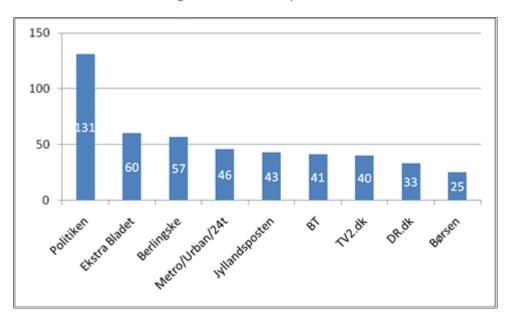


Figure 38 No. of articles per media

# • Børsen the most positive newspaper

Another interesting feature of the results is that the free newspapers, Urban, Metro Express and 24 Hours, were notably more negative in their coverage of the World Championships compared to paid-for newspapers and web media, although they ended up being the most positive once the event had finished. Børsen (the national financial newspaper) was the most positive media overall in its coverage of the Championships.

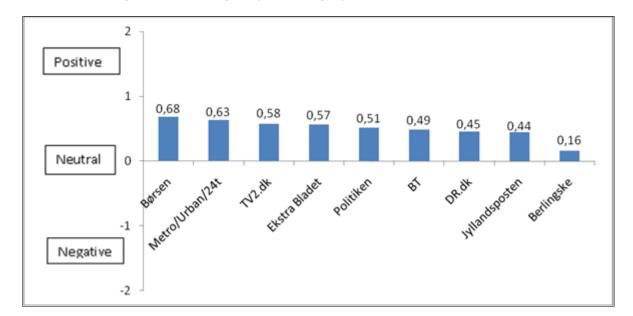


Figure 39 Positive /negative press coverage by media before end under the event

#### 5.3.5 The Danish media coverage: How it developed

Several citizens and stakeholders commented that they did not receive enough information about the Championships prior to event. In fact, it came as a surprise to many that the event was even taking place. If information about the event had succeeded in being communicated at an earlier state, some of the negative press coverage might have been avoided. The mainstream media did not see the World Championships as a great, unifying event in Denmark, but only as a sporting event, and were reluctant to cover it before it began. Furthermore, there was no real precedent coverage of an event of this scale. Denmark had never previously hosted a comparable event and hence the media were unfocussed in its coverage. Moreover, in the meantime, a general election was announced, which naturally drew the media's attention away from the event.

Nevertheless the media were in fact already writing about the Championships as early as June and July 2011. A search on Infomedia showed that 105 articles concerning the event were published between 1<sup>st</sup> June to 31st July 2011. In October 2010 there was already some minor coverage about the Championships 2011. Furthermore, TV2's coverage of the Tour de France July 2011 also extensively trailed the forthcoming World Championships in Copenhagen.

On the 28<sup>th</sup> of June, UCI Bike City Copenhagen arranged a big media event where the press was invited with their bikes to ride the UCI Road World Championships route along with the Lord Mayor of Copenhagen, Frank Jensen, and a number of the Danish UCI Road World racers.

Local citizens were, hence, given an ample chance to be informed about the race in good time before it started. However, considering that the advance publicity immediately prior to the event was almost exclusively in the sports media and sports sections, the message might not have been as broadly published as was needed.

# 5.4 International online press analysis

#### 5.4.1 Introduction

This part of the report measures the international press coverage of the UCI Road World Championships 2011 and the parallel proactive cultural press activities, telling the story about Copenhagen as a bike city and Denmark as a green bike country in the international press. The Championships are part of the Bike City Copenhagen project and hence part of a long term strategy to promote Copenhagen as a bike city

The purpose of the analysis is to capture and indicate the world wide public relations spin offs of the event, and thereby its direct international marketing value and indirect cultural value.

The report is based on a quantitative analysis of online articles in media from around the world extracted from primarily Meltwater News' international online statistics.

#### 5.4.2 Summary and conclusions – International online press analysis

The main objective of the communication plan were 1) To inform and facilitate the international sports press, 2) To attract audience to the World Road Race Championship, and 3) To enhance Denmark's international brand and to keep Copenhagen on top of mind as "a green, innovative and cool city".

- More than 40,441 international online articles on biking in Copenhagen within a year: The total amount of relevant online articles within both sports coverage and cultural cycling coverage (09.2010-10.2011) was 40,441 articles. Out of these, 15,378 articles were published in September '11, when the event took place in Copenhagen. The search indicates that the search tool might have difficulties finding articles in the Chinese and Arabic characters.
- The press coverage was most important in Europe: The distribution of online articles shows that Europe is the best represented region with 73.19 % of the coverage, while North America takes 14.29 % and Australia 5.45 %.
- The positive storytelling about the green bike city reached the world: The analysis shows that the cultural cycling press has reached a broader audience worldwide than the sports of cycling press, probably due to the proactive press activities.
- Yahoo and Procycling were important online channels but the big news media in the world covered the story as well: There were a wide spread of news media covering the Bike City project. Yahoo! News seemed to be especially interesting, spreading the message worldwide in 763 articles by 45 different sections or countries. Top of the cycling media was ProCycling who published 332 Copenhagen related articles in the chosen period.
- The tone of coverage was generally positive: A tentative tone analysis of the articles found in the period, on the sports coverage and the total Copenhagen cycling coverage respectively, indicated that both kinds of articles were positive towards the event and the city of Copenhagen.

- Travel magazines and nearby markets had satisfactory coverage on the bike city: Travel
  magazines were a focus point in the PR activities since an important goal was to attract audience
  and show tourists a reason to go to Copenhagen. Likewise the nearby markets: Sweden, Norway,
  and Germany, which were handled with satisfying results. Norway was the most interested market
  because of their popular racers participating in the event.
- International journalists were happy with the event: During the event the communication
  partners supported the hosting of about 500 accredited international journalists in the press
  centre. Statements from international journalists indicated that the journalists could be good
  future ambassadors for Denmark.
- Copenhagen biked against the world climate changes: A superior political strategic goal of the
  whole event and the PR activities was to show the world that Copenhagen is a frontrunner on the
  mission to make people go by bike instead of by car as an important factor in the fight against the
  world climate changes. The communications around the Bike City activities have helped to reach
  this goal (see example below).



#### 5.4.3 Methodology and limitations

The international press analysis is primarily based on search results from the international online search tool Meltwater News. No television, radio or printed media are taken into account in this part of the report. A few selected print media are used as visual examples; however these are not included in the shown statistics.

Within the statistics are counted Danish online articles which are <u>not</u> included in the analysis on the printed Danish press and TV2.dk and dr.dk online.

Furthermore, it should be noted that all graphs and numbers in this analysis are based on selected keywords used in Meltwater News. The key words are chosen and translated into a number of languages to track international articles regarding either the UCI Road World Championships 2011 UCI and/or articles regarding Copenhagen as an accentuated bike city.

Activities on social media are <u>not</u> included in the online press analysis. The analyses operates with a time period of up to 14 months – from the reveal of the event's taking place in Copenhagen in September 2010 until one month after the event; ultimo October 2011. Certain graphs zoom into September 2011.

The 'Meltwater Tone' analysis tool used in the report is a brand new online tool used on a test basis, and its results should only be seen as indicative.

Examples of international articles are shown in the appendix 4.

#### **5.4.4 Targeted press effort**

It was crucial that the UCI World Road Race Championships 2011, being the biggest sporting event Denmark had ever hosted, received significant press coverage. This could help attract a bigger audience, show secure public acceptance in spite of the local traffic critics, and create a maximum of international attention to the qualities of Denmark as a cycling nation, Denmark as a professional sports events destination and of Copenhagen as a green metropolis.

A target oriented communication strategy was set to mobilize the large international public and, at the same time, ensured continuity and synergy in the Bike City communication.

A group of partners worked side by side on the international press effort, these being:

- Wonderful Copenhagen
- Sport Event Denmark
- The Danish Cycling Union
- Visit Denmark
- The Danish Cyclist's Federation
- The Municipality of Copenhagen
- The Municipality of Rudersdal

The aim was to obtain the greatest possible effect and spreading of "the cycling city championship" taking place in Copenhagen/Rudersdal. Besides these official partners, the Danish Foreign Ministry, a number of Danish embassies, projects such as Copenhagenize and Baisikelia, and others made invaluable contributions to the international press work.

The main targets of the proactive press effort were:

- 1. To inform and facilitate the international sports press before, during and after the event.
- 2. To attract audience to the Championships via the international media to create "a reason to go" for tourists and people interested in cycling among well-defined target groups in the nearby markets and on focus markets.

3. To promote Denmark's international brand and to keep Copenhagen on top of mind as a "green, innovative and cool city" by announcements from the continuous communication platform for the Copenhagen cycle year, which, through PR, was presented on focus markets as well as in a large number of selected international day and life style media.

A number of press releases and newsletters with inspirational biking stories were distributed worldwide, and were followed up by phoning on selected focus markets and media. A number of international press visits in Copenhagen took place before and during the sports event, the existence of which was brought to the attention of everyone visiting Copenhagen.

In addition, the Danish communication partners serviced and facilitated the about 500 international journalists visiting Copenhagen during the World Championships to make them feel well hosted and to inspire them to tell other positive stories about Copenhagen and Danish culture during their stay.

# 5.4.5 The spread and penetration of UCI Bike City related press

In September 2010, the UCI Road World Championships took place in Geelong, Australia. Here, Copenhagen was announced as the 2011 Road World Championships. Copenhagen announced that it was planning to close down the streets in the heart of the city in order for the bikes to take over the streets during the championships. After this launch, most people in the cycling circles knew that the world championships were to take place in Copenhagen. However, it was not until after the three big annual cycling events had taken place: The Giro d'Italia, La Tour de France and La Vuelta that the international sports press started writing about Copenhagen. Particularly the last of the three cycling event launched the World Championships in Copenhagen as the next important destination in the international sports press.

The coverage of the cycling sport was supplemented by a proactive international PR effort regarding the 'green city of bikes'. The diagram below shows the spread of online articles on the event and on the cultural stories on Bike City.

The total amount of relevant online articles in the search (9.2010-10.2011) was 40,441 articles, of these 15,378 articles were published in September '11, where the event took place.





Explosion of bikes in Copenhagen

Cycling enthusiasts from around the world are looking thrill of the Road Race World Championship in Copenh September. And the citizens of Copenhagen are preparaduantage of three car free days in the center of the D where a big street festival is organized by the crew beh Roskilde Festival.



In Copenhagen cycling is chic

It's easy to bike and look good at the same time. The from the renowned blog 'Cyde Chic' which started in a 2006. Today the blog reports from 25 major cities all the heart of Cyde Chic is still in Copenhagen.

» Read more about Cycle Chic



Bike City for more than a century

The Danish cycle-culture is as old as the bicycle itself. have used bicycles to transport themselves to work sin-Back then, commuting by bike was the fastest, easiest environmentally friendly way to move around the city



#### A real cycling embassy

In 2009, a group of leading cycling advocates and experts joir to address the environmental, climate, and health challenges world. The outcome was the Cycling Embassy of Denmark, a comprehensive network of commercial, public, and civil society organizations, working together to promote cycling, communic solutions and know-how, and encourage cycling all over the wo



Lots of press material on UCI Road World Champions Copenhagen is commonly known to be a biking city where your stilettos, businessmen in suits and politicians going to work, all matter the weather and the time of the year Find all you need championship and Copenhagen here, including video and phote » Find all the text, video and pictures you need

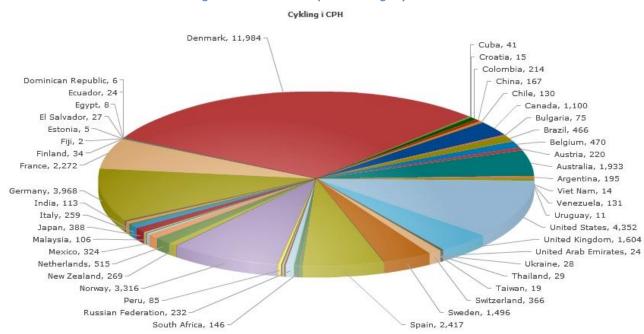


Figure 40 Distribution of press coverage by countries

The total amount in the search of all online media articles related to Copenhagen and bike and/or UCI cycling in more than 50 different languages in the period of September 2010 to October 2011 was 40,441 articles.

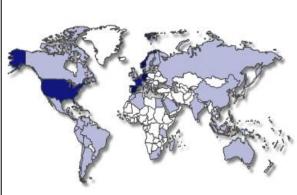
#### Coverage of sports and bike culture

Some countries such as Italy, France and Spain were relatively more interested in the cycling event in advance because of their traditions within this sport, or because the country had important racers with chances to win, such as Norway and Australia.

Looking into the content of the articles, it showed that articles published in these specific countries had a high proportion of sports articles compared to the rest of the countries. On the maps of the world below, the left map shows a search on online sports articles, while the right map illustrates a search in both sport and bike cultural articles. The color on the maps shows that the cultural cycling press has come to a broader audience than the sport of cycling press. It is likely that this is due to the proactive press activities.



Press coverage of the UCI Road World Championships 2011 (only sports). On the maps, the countries with the proportionately most articles have the darkest blue color



Total Bicycle press coverage (sports and cycling culture). The shown period is September 2010 to October 2011, where the total amount of all relevant articles was 40,441.

#### Medias with special interest

The graph below shows 20 selected media with a significant coverage of the Championships and/or the cycling city, selected with a geographic spread. A large number of sports media have more hits than what is shown on the graph below and yet are not included in this. For example ProCykling had in the chosen period published 332 articles mentioning cycling in Copenhagen and other cycling magazines had equivalent numbers of articles from Copenhagen.

Looking at the numbers behind the graphs, it shows that Yahoo! was an especially good media to spread the message, since Yahoo News and a number of country specific Yahoo sites altogether published 763 related articles by 45 different countries or sections (e.g. Yahoo Travel). The analysis also shows articles with background in telegrams from Reuters and AP. Reuters was present in Copenhagen at the event.

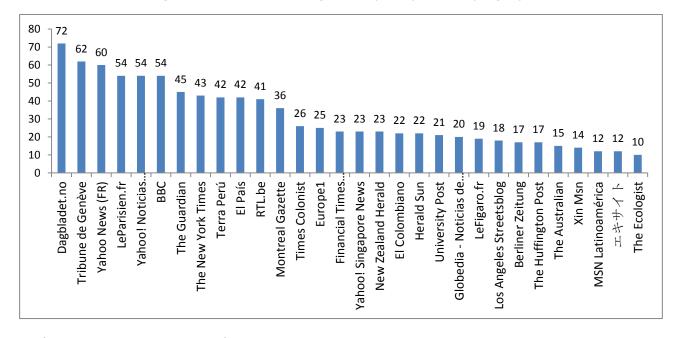


Figure 41 Selected media covering the Championships and the Cycling City

The figure above shows the amount of articles published in 30 selected media, illustrating the broad international press interest in the search period (9.2010-10.2011)

#### Tone of coverage

A vast majority of the international press coverage was positive. A tentative tone analysis of the articles found in the period on respectively the sports coverage and the total coverage - including sports and cultural cycling press - indicates that both kinds of articles were positive towards the event and the city of Copenhagen.

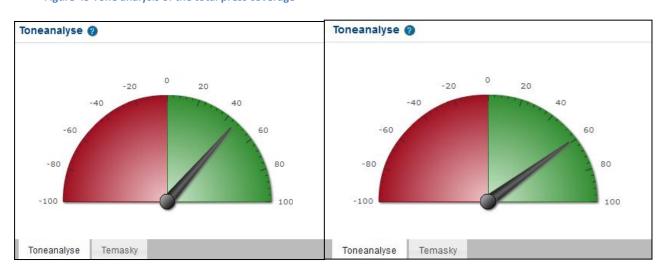


Figure 43 Tone analysis of the total press coverage

Figure 42 Tone Analysis of the sport press

The 'Meltwater Tone' measures the balance of positive/neutral/ negative words in the articles. The analysis tool is a new tool used on a test basis, and it' results should only be seen as indicative. Green is the positive side.

The sports press rates a little bit better that the cultural cycling press. This may be due to the news criteria that encourage news reporters treating the bicycle culture not only to write about the positive sides but also to dig into the structural stories behind the bicycle city.

An example is the article *In the City of Cyclists, Pedestrian Feel the Squeeze* in the New York Times, August 2011, based on the reporters interview with the Chairman of the Danish Pedestrian Confederation on an assumed battle for street space between cyclists, pedestrians and motorists - an unknown problem in Denmark, but the angle for an international article.

Compared to this, the sports press primarily writes about the sports results, the winners and the developments in the field. The sports press often focuses on their own national stars and results e.g. the article below, where *Le Monde* carries one of the upcoming French hopes on the stage in tribute.





#### 5.4.6 Focus on selected markets and activities

#### Long-haul markets

The figure below illustrates the distribution of all online articles (including Danish online articles) in the world regions. It shows that Europe is the best represented region with 73.2 % of the coverage, while North America takes 14.3% and Australia 5.5%.

Central and South America, Asia, Africa and the middle East were *not* focus markets and share the remaining only 7% of the press coverage. This is not surprising since the closest markets usually are the most interested, however, it could also indicate that the online search for articles has not been efficient enough. It proved difficult to find articles written in languages with different letter system that the western European. It was possible, however, to find articles from some of the big Chinese media and from Al Jazeera and the National from the Emirates (mostly articles written in English though).

Denmark, being the hosting nation, was represented with 11,984 articles of the total 40,441 articles, which is more than 29% of the total. Deducting these articles from the total number of articles would make the

distribution of international press coverage more significant in other parts of the world than Europe, e.g. North America would be represented with almost 19% of the total coverage in the chosen period, and only about half of the international online press coverage would be European.

Cykling i CPH

Central America, 0.41%

Australia/Oceania, 5.45%

Asia, 2.34%

Asia Pacific, 0.3%

Africa, 0.58%

South America, 3.16%

North America, 14.29%

Figure 44 Distribution of article in the world regions

See examples in appendix 4.

#### **Travel magazines**

Travel magazines were a focus in the proactive press activities since an important goal was to attract audience and show tourists a reason to go to Copenhagen. That's why, on every press trips going to Copenhagen for up to one year before the cycling event, the journalists had the cycling city theme brought to their attention. Also in terms of meetings and conventions, the storytelling about cycling Copenhagen was proactively being brought into their specific media.

For example, during the Championship a press trip with travel journalists from France, Germany, Italy, Spain and USA was arranged in Copenhagen, where the hosted journalists were given inspiration on the cycling theme and also attended the actual races.

See examples of articles from specific press trip in appendix 4.

#### **Nearby markets**

A part of the PR effort focused on creating press coverage in the nearby markets: Sweden, Norway, and Germany, from where one can easily and comfortably take a quick trip to the cycling party in Copenhagen.

The press interest and coverage was very diverse in the three countries. The graph below shows the penetration of Copenhagen cycling city press coverage in the three countries in September 2011.

Germany had the biggest amount of online articles but also has the most inhabitants – 81.3 million - and thus number of media, to Norway's almost 4.9 million inhabitants and Sweden's 9.3 million.

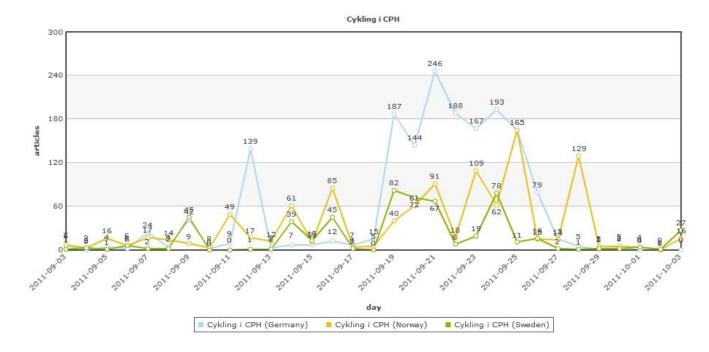


Figure 45 Press coverage in nearby markets (no. of articles)

The figure shows the amount of cycling Copenhagen related articles on a daily basis in September 2011 in respectively Germany (blue line), Norway (yellow line) and Sweden (green line). The Championships took place in Copenhagen from Monday 19<sup>th</sup> to the finals of the Road Race on Sunday 25<sup>th</sup>.

Particularly Norway was interested in the UCI World Road Race Championships beforehand because of the high profile Norwegian racers in the field. Hence the Norwegian media covered the Championships strongly both before and during the event, telling stories about the Norwegians going to Copenhagen together with service information on where to stay and what to do. Unfortunately the Norwegian favorite was injured, which sent him out of the race, and Norway didn't bring home any prizes.

During the proactive press effort up to the event, neither Germany nor Sweden seemed to find cycling especially interesting, for which reason it was necessary to communicate alternative messages to these countries. Since especially the south of Sweden and the north of Germany were close potential spectator markets for this event, a huge effort was put in the PR activities to these markets, telling stories about other things than the sports event, e.g. three days with a car-free centre city, the city bike festival etc. See examples in appendix 4.

#### **5.4.7** The hosting of international journalists

Prior to the Championships, all visiting international journalists received special information about the bike city and the Championships. During the event the communication partners supported the hosting of the about 500 accredited international journalists in the press centers.

As an extra gesture the international journalists received "The Sound of Copenhagen" as a red UCI championship ringing bell, as well as they were offered free guided bike trips around Copenhagen city.

#### Reviews from the international journalists

During interviews with international journalists it became clear that these could be good future ambassadors for Denmark. Among other statements they said:

"This event is a great opportunity for Denmark because one of the functions in cycling is showing the city and the country where the race takes place. The whole world is following the championship these days, and that's fantastic because Copenhagen is the most beautiful city in the world"

Philip Brunel, star reporter for L'Equipe, France

"A fantastic thing about Copenhagen is how beautiful the city is. A championship right in the heart of the city is a great opportunity to show it to the whole world. It is a good idea to let the racers ride right through Amalienborg, and I noticed that a couple of the racers mentioned at the press conference that they really appreciated that (..) I find it very important to show how many people in Copenhagen who cycle. Copenhagen is a role model for the rest of the world when it comes to cycling. It is fantastic that we can spread the word that you can use the bicycle no matter whether you bring your children to school or you take part in the championship. We are all one big cycle family."

- Laura Robinson, Pedal Magazine, Canada

"It is a fantastic idea having the time trials in the center of Copenhagen. I have never seen such a large audience and such a good atmosphere at a time trials. Not even Madrid or Verona can compare to this. It was fascinating to experience that everything in Copenhagen is about bicycles. It is very different from Germany. People in Copenhagen are crazy about their bicycles."

- Andreas Kublik, Tour Road cycling magazine, Germany

The 2011 UCI Road Race Champion, Mark Cavendish, tweeted from Copenhagen to his fans around the world on the day of the finals:



- Mark Cavendish on Twitter

# **Appendix 1: TV exposure by country**

# highest media impact created by Pan Europe and Italy

| Country      | Number of TV Channels | Number of Programs | Broadcasting Time<br>(h:mm:ss) | Actual Playing Time<br>(h:mm:ss) | Cumulated Audience<br>(millions) | IFM Event Index<br>(points) |
|--------------|-----------------------|--------------------|--------------------------------|----------------------------------|----------------------------------|-----------------------------|
| Australia    | 2                     | 2                  | 3:50:00                        | 3:45:29                          | 0,07                             | 0,483                       |
| Austria      | 1                     | 2                  | 0:00:31                        | 0:00:31                          | 1,65                             | 0,026                       |
| Belgium      | 6                     | 57                 | 30:29:52                       | 25:57:27                         | 16,29                            | 19,437                      |
| China        | no coverage           |                    |                                |                                  |                                  |                             |
| Denmark      | 3                     | 70                 | 37:52:09                       | 36:21:55                         | 19,04                            | 14,460                      |
| France       | 4                     | 17                 | 0:56:59                        | 0:48:02                          | 27,72                            | 2,674                       |
| Germany      | 11                    | 41                 | 0:58:35                        | 0:41:46                          | 49,13                            | 3,026                       |
| Italy        | 8                     | 61                 | 64:23:49                       | 61:27:09                         | 23,07                            | 32,973                      |
| Japan        | no coverage           |                    |                                |                                  |                                  |                             |
| Netherlands  | 3                     | 68                 | 14:08:43                       | 12:27:36                         | 21,55                            | 14,495                      |
| Pan Asia     | 1                     | 27                 | 71:30:00                       | 69:10:36                         | 0,29                             | 3,033                       |
| Pan Europe   | 3                     | 385                | 53:48:22                       | 51:30:43                         | 12,41                            | 54,099                      |
| South Africa | 4                     | 20                 | 55:20:00                       | 53:25:14                         | 0,20                             | 2,415                       |
| Spain        | 2                     | 34                 | 37:06:32                       | 35:37:43                         | 7,66                             | 6,998                       |
| Switzerland  | 7                     | 108                | 37:16:23                       | 36:00:50                         | 3,74                             | 1,506                       |
| UK           | 4                     | 21                 | 2:44:07                        | 2:22:24                          | 22,74                            | 7,634                       |
| total        | 59                    | 913                | 410:26:02                      | 389:37:25                        | 205,56                           | 163,259                     |

# **Appendix 2: Hits from Infomedia**

#### Hits from Infomedia for the period August-September 2011

Assessing Infomedia hits for the period 1 August-3 October 2011 by searching for 'World Championships Cycling\*'. The search was made on all types of articles. The search was made in each of the following media, after which the articles were read and sorted. The articles not related to the World Championships and which had a low relevance for the analysis were removed.

Articles total: 500 articles

| National daily newspaper | No. of <u>relevant</u> articles | No. of articles (hits) in total |
|--------------------------|---------------------------------|---------------------------------|
| Politiken                | 66                              | 74                              |
| Politiken.dk             | 82                              | 120                             |
| Berlingske               | 35                              | 66                              |
| Berlingske.dk            | 22                              | 25                              |
| Jyllandsposten           | 27                              | 71                              |
| JP.dk                    | 17                              | 22                              |
| Ekstrabladet             | 14                              | 38                              |
| Ekstrabladet.dk          | 49                              | 97                              |
| B.T.                     | 26                              | 69                              |
| B.T.dk                   | 15                              | 17                              |
| Børsen                   | 3                               | 5                               |
| Børsen.dk                | 22                              | 60                              |
| Metro/Urban/24t          | 24                              | 59                              |
| Metro/Urban/24t.dk       | 25                              | 54                              |
| DR.dk                    | 33                              | 91                              |
| TV2.dk                   | 40                              | 105                             |

#### Hits from Infomedia for the period June-July 2011

Infomedia hits for the period 1 June-31 July 2011 with a search under: 'World Championships cycling\*'. All types of articles were searched. The search was made on each of the following media outlets. Then, the articles were skimmed and those which were not World Championships-related, were removed and the rest were printed from the Infomedia site.

Articles total: 44

| National daily newspaper | No. of <u>relevant</u> articles | No. of articles (hits) in total |
|--------------------------|---------------------------------|---------------------------------|
| Politikken               | 8                               | 19                              |
| Berlingske               | 11                              | 15                              |
| Jyllandsposten           | 5                               | 19                              |
| Ekstrabladet             | 4                               | 9                               |
| B.T.                     | 6                               | 8                               |
| Børsen                   | 2                               | 3                               |
| Metro KBH/Urban/24t KBH  | 8                               | 9                               |

# Web sources – Daily newspapers and news sites

| National daily newspaper and news sites | No. of <u>relevant</u> articles | No. of articles (hits) in total |
|---|---------------------------------|---------------------------------|
| Politikken.dk                           | 8                               | 17                              |
| Berlingske.dk                           | 7                               | 7                               |
| Jyllandsposten.dk                       | 1                               | 4                               |
| Ekstrabladet.dk                         | 10                              | 16                              |
| B.T.dk                                  |                                 | 0                               |
| Børsen.dk                               | 7                               | 12                              |
| Metro/Urban/24t.dk                      | 8                               | 12                              |
| DR.dk                                   | 12                              | 17                              |
| TV2.dk/ News/finance/sport              | 8                               | 16                              |

Web source articles total: 61

In total, daily newspapers and web sources combined for the period 1 June-31 July = 105 articles

# **Appendix 3: Danish Press coverage (examples of online article)**

#### Note: the articles below are in Danish

#### Politikken.dk 19/9



#### Berlingske 20/9



http://politiken.dk/debat/ledere/ECE1400730/fantastisk-vm-i-koebenhavn/ 22/9



#### http://politiken.dk/sport/cykling/ECE1403846/traet-worre--vi-har-flyttet-vm-op-paa-et-nyt-niveau 25/9



## D 25/9 http://nyhederne.tv2.dk/article.php/id-44042893:politiet-begejstret-over-cykelvm.html?cbox2



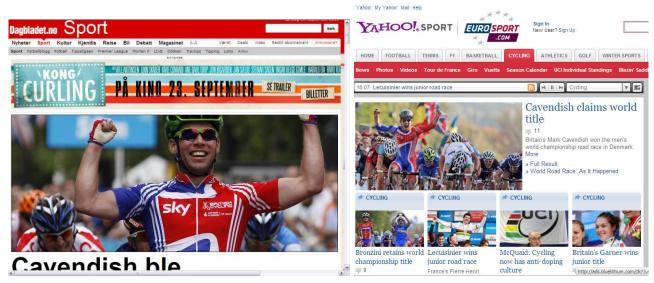
#### http://politiken.dk/ 26/9



The 2011 UCI Road World Championships

# **Appendix 4: International online press report (examples)**

## **Examples of sports articles**





**Examples of articles from distant markets** (Chinese media and Al Jazeera and the National from the Emirates):





#### **Examples of articles in Travel magazines:**



## **Examples of articles generated from press trips:**



## **Examples of articles from nearby markets:**

#### **Examples from Norway:**



#### Examples from Germany:

# Mortimer

Das Reisemagazin zu Ihren Diensten







#### Examples from Sweden:





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