2019 UCI CYCLO-CROSS WORLD CHAMPIONSHIPS - Bogense, Denmark

Impact report, April 2019

Final report
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The 2019 UCI Cyclo-cross World Championships (‘the Event’) brought one of the flagship events of world cycling to Bogense, Denmark. The investment in this Event brought thousands of visitors to Bogense, alongside competitors from 24 nations, media and officials, while showcasing both Bogense and Denmark to an international audience.

In addition to providing one of the sport’s great spectacles, the Event drove economic and broader impacts within Bogense, and Denmark more broadly. This impact report presents the findings of EY’s analysis of the impact of the UCI Cyclo-cross World Championships, focusing on the following key areas:

► Visitors to Bogense
► Media and teams
► The economic contribution of the UCI Cyclo-cross World Championships
► Event engagement

This impact report provides an assessment of the impact of the Event, based on a combination of primary and secondary information.
The main findings of this report are as follows:

► 10,100 unique spectators attended the UCI Cyclo-cross World Championships, contributing to total Event attendance of 15,000 over two days

► 7,600 unique attendees - 76% of the total - were visitors from outside of Bogense and the surrounding region

► In total, visiting spectators to Bogense spent €2.7m during their stay, directly benefitting a range of sectors

► 296 media personnel travelled to Bogense, while over 280 riders from 24 nations were present

► In total these visiting media and teams spent over €0.7m in Bogense over the course of the Event

► The activity supported by these additional expenditures generated by the Event provided a €3.6m boost to the economy of Bogense and the surrounding region, in terms of the contribution made to regional Gross Value Added (GVA)

► This is equivalent to supporting the annual employment of 84 people within Bogense and the surrounding region

► Attendees rated the Event highly, with 94% of attendees reporting being ‘satisfied’ or ‘very satisfied’ with the Event

► The Event had a positive impact on encouraging future visitors to Bogense and the surrounding region, with 83% of visitors from areas of Denmark outside of Bogense suggesting they would be likely or very likely to return for a holiday

► The overall Event reach across Facebook, Twitter and Instagram exceeded 3.6m impressions

Executive Summary: Key findings

10,100 Unique spectators attended the Event

7,600 Visitors from outside of Bogense and the surrounding region

€3.6m GVA boost to Bogense and the surrounding region

3.6m Social media reach and impressions
Introduction

This report presents an assessment of the impact of the UCI Cyclo-cross World Championships, based on a combination of primary survey evidence and secondary information.

There are four main channels of impact that flow from the UCI Cyclo-cross World Championships:

► **Visitors to Bogense** – supported by people travelling to Bogense for the purposes of the Event

► **Media and teams** – supported by the presence of media covering the Event in addition to the racing teams and their support staff

► **Event engagement** – the relationships developed with visitors and broadcast audiences that may drive future benefits to Bogense

► **Event delivery** – supported by the investment and operations of Event organisers, sponsors and partners

This report presents findings related to the analysis of each of these channels of impact to present an overview of the Event, and the contribution made to the regional economy.
1. Visitors to Bogense
Total attendance at the Event was 15,000, including 10,100 unique individuals

- Attendance at the Event was recorded at 15,000 over the two days.
- Spectator surveys suggest that on average spectators attended 1.5 days of the Event.
- This suggests that 10,100 unique visitors attended the Event in Bogense.

### 2019 UCI Cyclo-Cross World Championships attendance figures

<table>
<thead>
<tr>
<th>Date</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sat 2nd Feb</td>
<td>6,000</td>
</tr>
<tr>
<td>Sun 3rd Feb</td>
<td>9,000</td>
</tr>
<tr>
<td>Total</td>
<td>15,000</td>
</tr>
</tbody>
</table>

*Source: UCI*
Visitor surveys suggest that over 7,600 attendees were estimated to have travelled from outside of Bogense and the surrounding region.

Of those, over 2,400 came from other regions in Denmark, while 5,200 travelled from abroad.

The majority of international visitors came from within Europe (92%).

The top four origins were European countries: Belgium, the Netherlands, Germany and the UK, with the USA making up the top five. These countries collectively accounted for 79% of international visitors surveyed.

A small number of international attendees came from Australia (1%).

**Origin of international visitors by continent**

**Origin of international visitors by country (%)**

*Source: EY Sweeney; EY analysis
*Note: Detailed origin information is indicative only
In total, visitors to Bogense spent €2.7m during their stay, directly benefitting a range of sectors.

- A key driver of the economic impact of the Event was the spending of visitors during their stay.
- Visitors spent €1.2m on accommodation in Bogense and the surrounding region, making this their largest item of spending.
- This spending was supported by international visitors, who typically stayed for a longer period of time (3 nights) compared to non-local visitors (1.5 nights).
- Visitors spent a further €0.9m on food and drink, €0.4m on transport, and €0.2m on other items including merchandise and tourism.

<table>
<thead>
<tr>
<th>Average number of nights stayed by tourist type and purpose of visit</th>
<th>Length Of Stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-local</td>
<td>1.5</td>
</tr>
<tr>
<td>International</td>
<td>3.0</td>
</tr>
</tbody>
</table>

| Source: EY analysis |

<table>
<thead>
<tr>
<th>Summary of spend per person per night</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length Of Stay</td>
</tr>
<tr>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Non-local</td>
</tr>
<tr>
<td>International</td>
</tr>
</tbody>
</table>

| Source: EY analysis |

*Figures do not sum to total due to rounding.*
Overall, visitors' accommodation spending alone brought €1.2m into the Bogense economy.

- Of those who chose to stay overnight, the majority stayed at a hotel or motel or with family or friends.
- The majority of international visitors stayed in a motel or hotel, compared to just 17% of non-local visitors.
- The split of accommodation type varies significantly for non-local visitors, with 45% staying in an alternative type of accommodation to traditional ones (such as hotels). Nearly all of the rest of non-local visitors were split evenly across private homes of family/friends, Airbnbs or equivalent, and motels or hotels.
- Youth hostels and backpackers were the least popular form of accommodation, with only 1% of non-local visitors and less than 1% of international visitors taking this option.

**Breakdown of accommodation types for non-local and international visitors, percentage of total**

- A private home of family or friends: 16% (Non-Local), 17% (International)
- A private home through Airbnb or equivalent: 16% (Non-Local), 17% (International)
- Bogense Hallerne (converted school gym): 3% (Non-Local), 0% (International)
- Motel or Hotel: 17% (Non-Local), 54% (International)
- Serviced apartment: 2% (Non-Local), 10% (International)
- Some other form of accommodation: 45% (Non-Local)
- Trailer Park / Caravan Park: 2% (Non-Local), 13% (International)
- Youth Hostel or Backpackers: <1% (Non-Local), 1% (International)

*Source: EY analysis*
2. Media and teams
296 media personnel covered the Event, spending €0.2m in the region

- 296 media staff covered the UCI Cyclo-cross World Championships.
- Radio and television broadcasters comprised the majority of media personnel at the Championships, at 59%.
- The remaining 41% were made up of other media personnel.

**Media attendance**

- Radio and TV: 59%
- Other media: 41%

**Source:** UCI; EY Analysis
Riders from 24 nations were present at the UCI Cyclo-cross World Championships

- 280 riders from 24 nations travelled to Bogense to compete in the UCI Cyclo-cross World Championships.
- 73% of team members came from the 10 nations providing the most individuals.
- The single largest contingent came from the Netherlands, with 30 members, while two nations (Austria and Iceland) were represented by just a single member.
In total, race teams’ spending in Bogense reached €0.5m

Team spending was largely concentrated on accommodation, which also included a significant element of food and drink as part of combined accommodation packages.

At €178 per person per night, team spending exceeded visitor spending but was less than that of media spending.

Average number of nights stayed and group size

<table>
<thead>
<tr>
<th></th>
<th>Length Of Stay (nights)</th>
<th>Group size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teams</td>
<td>4.2</td>
<td>25.4</td>
</tr>
</tbody>
</table>

*this will likely include food and drink as part of agreed packages

Source: EY Sweeney; UCI

Average spend per team member per night, by category (€)

- Accommodation*: €122
- Food and Drink: €30
- Transport: €18
- Cycling products (e.g. tyres, tubes): €6
- Other: €2

*Per team per night

€4,520

Source: EY Sweeney; EY analysis

€178

Source: EY Sweeney; UCI
3. The economic contribution of the UCI Cyclo-cross World Championships
Measuring the economic impact of the UCI Cyclo-cross World Championships

This report considers three stages of economic impact:

► **Direct**: resulting from spending directly related to the Event, such as employment at the Event and tourism spending;

► **Indirect**: representing the activity supported within relevant supply chains

► **Induced**: resulting from the increased employment income, a proportion of which is then spent throughout the economy

These impacts are generated by the activities associated with the Event itself, the four main categories of which are shown on the chart opposite.

The economic analysis within this section focuses on the impacts of visitors, Event delivery, media and teams, in Bogense and the surrounding region which is defined are the island of Funen. Fan engagement impacts are considered within the final section of this report.

The impacts of visitors, media and teams upon Bogense and the surrounding region are based on the spending patterns described previously within this report. This includes only the spending of those groups and individuals who are not residents of the region, and who travelled to the region specifically for the Event. Event delivery impacts include local spending of sponsors, partners and delivery related activity, excluding activity funded by government.

These levels of spending are then entered into EY’s economic impact model, which estimates the economic activity directly supported by the additional spending brought into the regional economy, and the broader activity stimulated throughout supply chains and through the employment incomes generated.
The Event delivered €3.6m of additional value to the Bogense and regional economy

- The incremental value to the Bogense and regional economy is estimated to be €3.6m, as measured by its Gross Value Added (GVA) contribution.*

- This total impact included €1.6m of direct GVA, supported by visitor spending and that of media and teams in Bogense.

- This direct impact generated a further €1.0m indirectly through the demand created down businesses’ supply chains.

- A further €0.9m of induced GVA was then supported through employment income that is generated as a result of these direct and indirect impacts.

- Visitors underpinned 72% of the GVA impact through their spending during their stay in the region.

- The remaining GVA impact was split between the spend of media and teams (19%) and Event delivery (9%).

*GVA is a measure of economic activity typically used to measure activities taking place below the national level, such as state/region, industry/sector, or individual business or events. GVA can be viewed as the incremental contribution to Gross Domestic Product.
The impacts from the Event supported 84 jobs

- The economic activity generated by the UCI Cyclo-cross World Championships supported employment equivalent to 84 full time jobs within Bogense and the surrounding region.*

- Direct impacts accounted for 53 of these jobs, while indirect and induced impacts supported 31.

- 64% of the employment impact was driven by visitors and their spending during their stay in Bogense.

- The remaining employment impact was supported by the spending of media and teams (18%) and Event delivery (18%).

- A greater proportion of the employment impacts are supported by Event delivery activities since these activities and their supply chains are relatively more employment intensive.

* Employment impacts are presented in terms of annual employment equivalents. The employment supported in the period surrounding the UCI Cyclo-cross World Championships would therefore be somewhat larger.
Overall, 94% of attendees were satisfied or very satisfied with the UCI Cyclo-cross World Championships

- Overall, visitors rated the Event highly, with local and local attendees rating it slightly more favourably than those from overseas.
- 58% of international visitors were very satisfied with the Event, compared to 64% of all respondents to the survey.
- Overall, just 1% of those surveyed were dissatisfied or very dissatisfied, in what appears to be a strong endorsement of the Event and Bogense as a host.
- This is a similar profile to the UCI World Championships held across disciplines in Norway (Bergen), the Netherlands (Apeldoorn), and Switzerland (Lenzerheide) over the past two years, each of which also achieved satisfaction ratings in the mid-nineties and dissatisfaction ratings of 1% or fewer.

**Event rating - International Visitors**

Overall how satisfied were you with your experience at the 2019 UCI Cyclo-Cross World Championships?

- Very satisfied: 1%
- Satisfied: 32%
- Neutral: 58%
- Dissatisfied: 0%
- Very dissatisfied: 9%

**Event rating - Bogense Residents**

Overall how satisfied were you with your experience at the 2019 UCI Cyclo-Cross World Championships?

- Very satisfied: 69%
- Satisfied: 27%
- Neutral: 3%
- Dissatisfied: 0%
- Very dissatisfied: 1%

*Numbers do not sum due to rounding

Source: EY Sweeney; EY analysis
83% of non-local visitors are “likely” or “very likely” to return to the region for a holiday

<table>
<thead>
<tr>
<th>Bogense as a holiday destination - Non-local visitors</th>
<th>Bogense as a holiday destination - International visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>As a result of this trip to Bogense for the 2019 UCI Cyclo-Cross World Championships, how likely are you to return for a holiday?</td>
<td>As a result of this trip to Bogense for the 2019 UCI Cyclo-Cross World Championships, how likely are you to return for a holiday?</td>
</tr>
<tr>
<td>![Pie chart showing the responses of non-local visitors]</td>
<td>![Pie chart showing the responses of international visitors]</td>
</tr>
<tr>
<td>- Very likely: 53%</td>
<td>- Very likely: 45%</td>
</tr>
<tr>
<td>- Likely: 30%</td>
<td>- Likely: 21%</td>
</tr>
<tr>
<td>- Neutral: 8%</td>
<td>- Neutral: 15%</td>
</tr>
<tr>
<td>- Unlikely: 4%</td>
<td>- Unlikely: 11%</td>
</tr>
<tr>
<td>- Very unlikely: 5%</td>
<td>- Very unlikely: 6%</td>
</tr>
<tr>
<td>- Don’t know: 0%</td>
<td>- Don’t know: 2%</td>
</tr>
</tbody>
</table>

- Non-local visitors were very positive about Bogense’s potential as a holiday destination, with 83% of those surveyed saying that they would be likely or very likely to return.

- International visitors were also positive, but to a lesser extent; 66% of people said that they would be likely or very likely to return to Bogense for a holiday.

- 53% of non-local visitors stated that they would be very likely to return for a holiday, compared to just 21% of international visitors.

- Similarly, 13% of non-local visitors stated that they would be unlikely or very unlikely to return, with the figure rising to 17% for those from outside Denmark.

Source: EY Sweeney; EY analysis
The Event was broadcast in 76 countries, with a cumulative audience of 51 million

- The UCI Cyclo-cross World Championships were broadcast to substantial audiences across the globe (51 million). The cumulative audience increased by 26% compared to the prior year’s UCI Cyclo-cross World Championships.
- The vast majority of hours viewed – 84% – was through dedicated coverage, which comprises live, near-live, repeated and highlights broadcasts. The remaining 16% was secondary coverage, which comprises general sports programme coverage, news, and other media with limited sporting content.
- 76 countries had coverage of the Event; this represented a decrease of 39% on the prior year’s event.
- The cumulative audience in Denmark was 5 million, 10% of the worldwide figure.
Social media coverage reached significant audiences over the course of the Event

<table>
<thead>
<tr>
<th>Website</th>
<th>Twitter</th>
<th>Instagram</th>
<th>Facebook</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>82,000 unique users during the week of the Event (-34% compared to prior year)</td>
<td>1.8m Twitter impressions (+11%)</td>
<td>2,300 posts featuring #Bogense2019 (+0.7%)</td>
<td>1,300 net new page likes during the Event (-2.9%)</td>
<td>285,000 views</td>
</tr>
<tr>
<td>390,000 page views during the week of the Event (-27%)</td>
<td>136,000 impressions made by the most viewed Tweet about the UCI Cyclo-cross World Championships (+44%)</td>
<td>12 posts (best post with 465,000 impressions and 17,400 likes)</td>
<td>170,000 fans reached by the most successful post</td>
<td>3,570 net new subscribers during the week of the Event</td>
</tr>
<tr>
<td>128,000 sessions (-35%)</td>
<td>12,000 Tweets including #Bogense2019</td>
<td>1.2m total impressions</td>
<td>621,000 total reach, 503,000 of which organic (non-paid)</td>
<td>49% average percentage viewed (highlights)</td>
</tr>
<tr>
<td>Traffic was primarily from France, the UK and the USA</td>
<td>400 net new followers during the week of the Event</td>
<td>3,400 net new followers during the week of the Event (+153%)</td>
<td>1.3m video views (UCI Cyclocross page)</td>
<td>Live events: 219,000 views across all events, including 82,000 for Men U23</td>
</tr>
<tr>
<td></td>
<td>321,000 video views (+78%)</td>
<td>Instagram live Videos up to twice per day during the Event</td>
<td></td>
<td>Highlights: 66,000 views across all events, including 23,000 for Women Elite</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Teaser video: 33,000 views</td>
</tr>
</tbody>
</table>

Source: UCI Communications Report
Annex A: Survey methodology

Extensive primary research was conducted to estimate the number of visitors travelling to Bogense over the course of the UCI Cyclo-cross World Championships, their spending patterns and activities undertaken during their stay. This involved conducting survey interviews of three groups of people during the course of the Event:

- Spectators
- Teams
- Media

The questions covered areas such as:

- Origin of respondent
- Size of their party
- Length of stay in Bogense
- Spending by category while in Bogense
- Experience of Championships
- Activities undertaken

For spectator surveys, researchers made efforts to approach potential interviewees at random to gain a representative picture of the origin of spectators. An online survey was also issued in order to collect additional information.

For teams and media a similar weighting approach was taken using official accreditation information.

<table>
<thead>
<tr>
<th>Number of respondents</th>
<th>Attendees</th>
<th>Team</th>
<th>Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>498 (face to face)</td>
<td>19</td>
<td></td>
<td>81</td>
</tr>
<tr>
<td>Selection approach</td>
<td>Face to face randomly at entry points</td>
<td>Online survey issued to all</td>
<td>Online survey issued to all</td>
</tr>
<tr>
<td>Total population</td>
<td>15,000 (est.)</td>
<td>24 nations</td>
<td>296</td>
</tr>
</tbody>
</table>
Annex B: Impact measurement methodology

Overview
► The economic impacts associated with the UCI Cyclo-cross World Championships are broadly broken down into three categories:
  ► Visitor spending
  ► Media and teams
  ► Event Delivery
► Within each of these categories, direct, indirect and induced impacts have been estimated.

Direct spending in Bogense and the surrounding region
► The direct impacts for both visitor spending and media and teams are based on the surveys outlined in Annex A.
► For visitors, only the spending of residents from outside of Bogense and the surrounding region is included, and only where respondents identify the Event as the main purpose of their visit.
► For media and teams, all spending within Bogense and the surrounding region is included, apart from that of local media professionals, since it is assumed that this spending would not occur in Bogense without the Event.
► For Event delivery, the costs incurred in the region by the local organising committee, the UCI and Event sponsors and partners is included as part of the impacts.
► Government funded spending in the region is excluded from the impact analysis, since arguably this spending may have occurred at another time in the absence of the Event – this is a conservative assumption, since it may not necessarily have occurred in the region.

Direct economic impacts
► Once the spending impacts in the region have been estimated, and assigned to specific sectors, industry by industry estimates of direct impacts on employment and GVA are estimated.
► These are based on the ratios of GVA and employment to output in each of the industries for which a direct spending impact has been identified.

Indirect and induced impacts
► Indirect and induced impacts are calculated using EY's economic impact model, which assigns GVA and employment ‘effects' to the direct industry by industry spending.
► These effects show the total impact on the region's economy for each €1 output in the sector. These were calculated based on the structure of the regional economy, after accounting for leakages such as imports from abroad and from elsewhere in Denmark.
► This follows the input-output framework pioneered by Wassily Leontief, and is based on Danish national accounts data collated by the Organisation for Economic Cooperation and Development.
Annex B: Impact measurement methodology

Further considerations

► The approach taken to economic impact measurement is effective in understanding the key drivers behind the economic impact of the Event, and in isolating impacts that occur as a result of the Event from those which may well have occurred regardless.

► Nevertheless, there are a number of factors that could be not be fully captured within the approach to this study given the information available, in particular:

► **Consumer welfare**

Where there is a positive difference between the amount that a consumer is willing to pay for a good or service and the amount actually paid, this results in a positive impact on consumer welfare. An indication of this potentially positive impact is captured through a survey of spectators attitudes, though this does not necessarily capture the views of all Bogense residents. Given the non-ticketed nature of the Event, which allows many spectators to view the Event at no immediate personal cost, the consumer welfare impact may be substantial.

► **Social benefits**

Impacts resulting from increased physical activity and general wellbeing that may derived from increased sports participation supported by the UCI Cyclo-cross World Championships are not considered as part of this study.

► **Economic and social costs**

Disruption, such as to the transport network, which may in turn result in reduced economic activity, are not explicitly captured within this study. However, is it likely that the majority of economic activity that is disrupted over the course of the Event will be displaced to periods prior or following the Event, rather than being lost.

► **Additionality**

As far as possible, this study seeks to include only those economic impacts which are additional to the region. As a result, only the impacts of expenditure from outside of the Bogense region are included within the overall impact. To the extent that the Event has actively discouraged visitors into Bogense, this may reduce the impacts from those stated within this report. However, this impact is expected to be minimal.