

2023 UCI Cycling World Championships socio-economic impact evaluation

Final report

February 2024



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1. Introduction

1.1 Background

In February 2019, the Union Cycliste Internationale (UCI), the world governing body of cycling, announced that the 2023 UCI Cycling World Championships (“2023 UCI Cycling Worlds”) would take place in Glasgow and across Scotland. Staged between 3 and 13 August, the 2023 UCI Cycling Worlds were the inaugural edition of this new combined event and brought together 13 individual UCI World Championships across seven cycling disciplines¹. Unprecedented in scope and scale for cycling, this event was also one of the largest international sporting events hosted in the UK in 2023. Going forward, it will be held every four years in the year preceding the Summer Olympic and Paralympic Games.

The award of the 2023 UCI Cycling Worlds was testament to Glasgow and Scotland’s reputation as a successful host of premier sporting events, both in cycling and more widely: it followed Glasgow’s hosting of the Commonwealth Games in 2014 and the European Championships (a seven-sport event which included cycling) in 2018, as well as major road cycling events, track events at the Sir Chris Hoy Velodrome and BMX Racing competitions at the BMX Centre. The event was delivered in collaboration between the UCI, Scottish Government, Glasgow City Council, UK Sport/The National Lottery, British Cycling, Glasgow Life and VisitScotland with its EventScotland team through 2023 Cycling World Championships Ltd. While Glasgow was the primary host, the event was staged in a pan-Scotland approach, hosted in 10 venues and across 14 Local Authorities.

The significance of the 2023 UCI Cycling Worlds was not just restricted to its unprecedented profile for cycling as a sport. The 2023 UCI Cycling Worlds were also a critical part of the Scottish Government’s aim of making Scotland a cycling nation by inspiring new and existing cyclists to make cycling an activity for life, whether for exercise, sport, transport or fun. This delivers benefits including in health, active travel and sustainability². The 2023 UCI Cycling Worlds also provided an opportunity to showcase Scotland and the UK as a high-quality visitor destination, via the positive experience of international attendees at the event itself as well as its extensive global broadcast reach.

1.2 Context

Given the magnitude of the 2023 UCI Cycling Worlds from both a sporting and societal perspective, the United Kingdom Sports Council (“UK Sport”) and 2023 Cycling World Championships Ltd, also known as the Host, have partnered with EY to produce a study evaluating the socioeconomic benefits delivered by the Championships. The study’s primary focus is on evaluating the socioeconomic benefits of the event to Scotland, but the study also includes an assessment of benefits to Glasgow and the UK. The evaluation has been carried out on three impact areas: social, economic and environmental.

This report, produced after the 2023 UCI Cycling Worlds, sets out the findings of the study. This section documents the objectives of the 2023 UCI Cycling Worlds and how the event intended to deliver social, economic and environmental benefits. The remainder of the report first provides an overview of the event and then sets out the detailed findings of the study, including how the findings were derived and an assessment of whether the 2023 UCI Cycling Worlds were successful in meeting the pre-event objectives.

¹ In total, there are 11 cycling disciplines: road, track, mountain bike, BMX freestyle, BMX racing; indoor cycling; trials; cyclo-cross; gravel; cycling esport and para-cycling. Source: <https://www.uci.org/disciplines/all/2tLnZMo6WrUBpIRXDxyEi7>

² Source: <https://www.cyclist.co.uk/news/glasgow-to-host-first-multi-discipline-uci-worlds-in-2023>

1.3 Objectives of the event and outcome areas

The 2023 UCI Cycling Worlds had four overarching objectives, each underpinned by several sub-objectives. The four overarching objectives are set out in Figure 1 below: operational excellence, engaging new audiences, commercial success and policy delivery. These four objectives were developed with the aim of ensuring the 2023 UCI Cycling Worlds were delivered successfully, would raise engagement and awareness of cycling as a sport, would result in new revenue streams, and finally would also deliver policy goals. These had the collective aim of creating the most value for local businesses, engaging new audiences and championing the power of the bike. These objectives were developed by the Host through a pre-event consultative exercise and derived from the shared vision outlined in the Long Form Agreement with the UCI that the “2023 UCI Cycling World Championships will be a catalyst for behavioural change across Scotland from 2019 to 2027”. Operational, commercial, marketing and policy delivery goals were all considered in the context and the so established objectives shared with the UCI and signed off by the 2023 Cycling World Championships Ltd Board through a collective process.

Figure 1: Overarching objectives of the 2023 UCI Cycling Worlds



To measure whether these objectives were met, a set of key performance indicators (“KPIs”) were developed (c.140) by the Host. These KPIs were intended to capture benefits across multiple channels, broadly categorised into economic, social and sustainability (primarily environmental impacts). Figure 2 illustrates how the objectives were intended to deliver economic, social and sustainability impacts.

Figure 2: Objectives of the Championships drove benefits in several areas



1.4 Social contribution, economic contribution and sustainability

Impacts on the three outcome areas have been reported through the social contribution, economic contribution, and sustainability impact of the 2023 UCI Cycling Worlds. Detail on each of these contributions is set out below, linked back to event objectives.

1. The social contribution

- The 2023 UCI Cycling Worlds aimed to engage new audiences for the sport, as well as be a catalyst for change to deliver long-lasting impacts for society. The Host, Scottish Government, UK Sport, Glasgow, the UCI, and partners aimed to have wide-reaching social benefits in several areas: (i) equality, diversity and inclusion, (ii) health and wellbeing, (iii) sport excellence, (iv) community and (v) lasting impacts.
- These goals were achieved by, among others, promoting inclusiveness and accessibility among audiences; encouraging the use of active travel; establishing the 2023 UCI Cycling Worlds as a world-class sporting event; inspiring a sense of civic pride across Scottish residents and facilitating investment across all local authorities.
- In order to capture the breadth of these benefits effectively and accurately, impact metrics on social contribution were gathered through primary research (i.e., a series of surveys and targeted interviews of relevant stakeholder groups). A summary of impacts measured are as follows³:
 - ▶ **Equality, diversity and inclusion:** demographic diversity and positive sentiment
 - ▶ **Health and wellbeing:** use of active travel, increased awareness of Scotland’s cycling facilities, increased inspiration to do sport and physical activity
 - ▶ **Sport excellence:** athlete ratings, disciplines adhering with UCI organisation guide⁴ and satisfaction levels with sport competition

³ In line with other event-specific evaluation studies conducted by EY, as well as those in the public domain conducted by other organisations, the focus of the social impact assessment is on health, wellbeing and community outcomes, as well as investment into policy impact delivery. This methodology has been selected in lieu of a £ value social return on investment calculation, which tends to be conducted in relation to ongoing participation programmes and hence is not considered suitable for this study.

⁴ Organisation guides for each event are produced by the UCI to facilitate event organisation and to outline the Organising Committee’s rights and obligations.

- ▶ **Community:** education and training of employees and volunteers, investment in venues, equipment and infrastructure and feelings of civic pride in the community
- ▶ **Lasting impacts:** stakeholder activities continuing beyond the 2023 UCI Cycling Worlds

Our findings on the event's social contribution and an assessment of how well the 2023 UCI Cycling Worlds met its objectives in this regard are provided in Section 3.

2. The economic contribution

- A goal of the Championships was to promote Scotland as a tourism destination, advocate cycling to a global audience and build new commercial revenue streams. Around a million spectators attended the Championships, over a third of whom came from outside Scotland. Out of these, 89,000 came from outside the United Kingdom (this refers to total attendance, not unique individuals); people travelled from five continents. Spending by spectators⁵, teams⁶ and media provided a significant boost to local businesses.
- These benefits were measured by four metrics. The first was the broadcast reach of the event, demonstrating the event's effectiveness in engaging a global audience. The other three metrics were seeking to understand the incremental local economic activity because of the 2023 UCI Cycling Worlds, measured by spending, gross value added (GVA) and employment. A summary of the impacts measured is set out below:
 - ▶ **Broadcasting reach:** global and local television audiences and social media engagement.
 - ▶ **Incremental spending:** this is the incremental spending from spectators, media and teams staying in Glasgow, Scotland and the UK because of the event and the spending related to event delivery (i.e., the pre-event, during-event and post-event spend required to successfully deliver the event)
 - ▶ **GVA impacts:** direct, indirect and induced impacts on the monetary value of goods and services in Scotland, Glasgow and the UK arising from the incremental spending
 - ▶ **Employment impacts:** direct, indirect and induced jobs supported in Scotland, Glasgow and the UK because of the incremental spending.

The event's economic contribution and an assessment of how well the 2023 UCI Cycling Worlds met its economic contribution objectives are provided in Section 4.

3. Sustainability

- Sustainability was a core objective in delivering an innovative world-class event that provides a model for the future, with several sustainability interventions put in place to support Scotland's climate ambitions. These included signing the UN Sport for Climate Action Framework, enhancing climate change awareness and sustainability upskilling, encouraging the use of sustainable transport, waste being diverted from landfill, energy use from renewable sources, as well as sustainability standards being a core part of the procurement process.

⁵ This includes spending by non-local and international spectators only.

⁶ This includes spending by all participants and their supporting teams.

- Sustainability data was collected and includes information on the carbon footprint of the Championships, sustainable transport, waste produced at the Championships, energy consumption, and local environments and biodiversity. These findings will be reported as part of a Sustainability Report being prepared by the Host; however, some initial findings from primary research for this study have been summarised in this report, in Section 5.

1.5 Data collection approach

EY has undertaken an extensive and detailed data collection exercise to gather the quantitative and qualitative inputs to measure the event's socio-economic contribution. These reflect the unprecedented and unique nature of the event and the breadth and depth of this study. This data collection exercise, which began in January 2023 and continued until October 2023, included primary and secondary research and extensive engagement with delivery partners and other stakeholders.

The primary research comprised in-person and online surveys of spectators to the Championships, media personnel covering the event, the competing nations and individual entrants participating in the 2023 UCI Cycling Worlds. The surveys comprised an extensive set of questions covering duration of stay, spending patterns, views on Scotland as a tourist destination and sustainability initiatives.

In total, almost 9,500 survey responses were received for the event, with c.8,900 responses to the spectator survey. This was a substantial number of responses, enabling an extremely robust evidence base from which to develop the findings for this study. In addition, 21 stakeholder interviews were carried out through video calls post-event. The stakeholders included those from the Host along with government, sporting, environmental, business, travel and tourism bodies and also businesses and community groups, ensuring that a comprehensive range of views of the event were captured.

The output reports of several other delivery partners have also formed inputs into this report, including an independent EDI Report, the Volunteer Report and Scottish Cycling's Ride the Worlds Report. Further detail can be found in Section 7.4.

This extensive data collection, together with benchmarks from EY's extensive global experience of delivering cycling and sporting event economic impact studies, including in Europe and Australia, has enabled a robust and comprehensive assessment on whether the 2023 UCI Cycling Worlds met their objectives. Detail on the full methodology for the study can be found in Section 7.

2. Overview of the 2023 UCI Cycling World Championships

2.1 The UCI and Host Partners

The 2023 UCI Cycling World Championships brought a number of key organisations together who worked collectively to deliver this significant event. Table 1 provides background information on the UCI and the 2023 UCI Cycling Worlds Host Partners.

Table 1: The UCI and Host Partners

Organisation	Background
<p>The UCI</p> 	<p>The UCI was founded in 1900 in Paris, France and is headquartered in Aigle, Switzerland. The UCI has 203 National Federations, spread across five Continental Confederations.⁷</p> <p>UCI events bring millions of people together each year to celebrate the sporting achievements of both Elite and amateur athletes, attracting spectators and wider audiences from across the globe.⁸</p>
<p>Scottish Government</p> 	<p>The Scottish Government is the devolved government for Scotland and has a range of responsibilities that include the economy, education, health, justice, rural affairs, housing, environment, equal opportunities, consumer advocacy and advice, transport and taxation.</p> <p>Scottish Ministers entered into a Long Form Agreement (LFA) with the UCI for the hosting, management, organisation and promotion of the Championships and have delegated its rights and responsibility under the LFA to 2023 Cycling World Championships Ltd, a new subsidiary of VisitScotland. The aim of the LFA is to provide the most efficient and appropriate model for the first staging of the 2023 Championships.⁹</p> <p>Angus Robertson MSP, Cabinet Secretary for the Constitution, External Affairs, and Culture, has stated:</p> <p><i>“The 2023 UCI World Championships provides a unique opportunity and platform to celebrate the Power of the Bike and promote Scotland globally whilst contributing to key policy areas such as Participation, Tourism, Industry, Sport, Events and Transport.”</i></p>
<p>Glasgow Life and Glasgow City Council</p> 	<p>Glasgow Life is a charity working for the benefit of the people of Glasgow. Its programmes, services and events enable people to experience the life changing benefits of participating in culture and sport at all levels. These range from activities in local communities to large-scale events which present Glasgow internationally.</p> <p>Glasgow Life’s work is designed to promote inclusion, happiness and health, as well as support the city’s visitor economy, in order to enhance Glasgow’s mental, physical and economic wellbeing.¹⁰</p>
<p>UK Sport (The National Lottery)</p> 	<p>UK Sport’s Major Events Programme is projected to invest almost £40million of National Lottery funding through to 2025 to support the bidding and staging of major events on home soil, as well as providing specialist support to organisers. Events are supported not only for their performance impact on British athletes, but also to maximise wider sporting, social, cultural, and economic benefits. In addition, UK Sport also invests major event funding on behalf of Government including £9m into the 2019 UCI World Road Cycling Championships and £15m into the 2021 Rugby League World Cup.</p>
<p>British Cycling</p> 	<p>British Cycling is the national governing body for the sport of cycling in Britain. It governs and develops the sport from grassroots participation through to supporting the riders representing Great Britain on the international stage.¹¹</p>

⁷ Source: UCI.org.

⁸ Source: EY UCI events economic impact report – annual review of 2022.

⁹ Source: Glasgow.gov.uk – 2023 UCI Cycling World Championships – Progress noted.

¹⁰ Source: Peoplemakeglasgow.com.

¹¹ Source: Britishcycling.org.uk.

2.2 UCI World Championships that make up the 2023 UCI Cycling Worlds

As set out in Section 1, the 2023 UCI Cycling Worlds were unprecedented in bringing together 13 individual UCI World Championships for the first time. Detail on these is set out in Table 2 below.

Table 2: Event names and descriptions in 2023 UCI Cycling Worlds

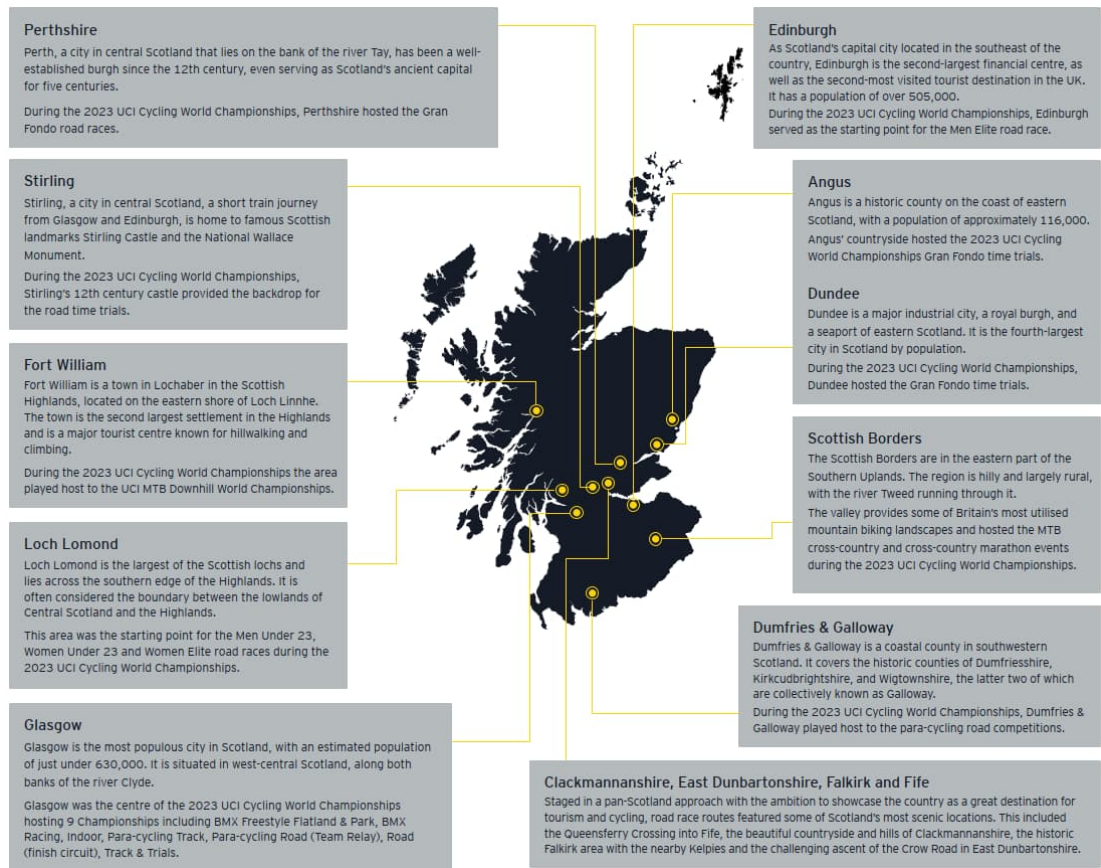
	Event	Description
Olympic event	Road	Individual time trial: a competitive race where riders set off individually at regular intervals. The winner is the rider who records the fastest time. Team time trial mixed relay: a race in which a squad of six riders – three female and three male – race in a relay format. The winner is the team with the fastest total time registered upon completion of their final lap.
	Para-cycling Road	In this event, the conditions and formats are similar to the road events but are specifically for para-cyclists.
	Track	Competitions are held at a velodrome over a week and are divided into sprint and endurance events, for both teams and individuals.
	Para-cycling Track	The conditions and formats are similar to those for track.
	Mountain bike (MTB) Cross-country	Held in the countryside, largely on off-road terrain, and includes the Olympic format, cross-country Olympic (XCO), the shorter cross-country short track (XCC), E-MTB cross-country (E-MTB) and the mixed team relay (XCR).
	MTB Downhill	A high-speed downhill race on harsh terrain, where riders descend one at a time.
	MTB Marathon	Similar to MTB XCO, but the course length spans over 100kms.
Olympic event	BMX Racing	A single lap race with eight riders on a specially designed 350m to 400m track alternating bumps, banked turns and flat sections.
	BMX Freestyle Park	A two-round format where each rider has 60 seconds to perform as many tricks as possible on the park's different modules. Points are scored on originality, variety and degree of difficulty.
	BMX Freestyle Flatland	Combination of freestyling and breakdancing on a flat surface with tricks performed on flat ground to a rhythmic beat. Points scored on creativity of routine and consistency to stay on beat.
	Trials	Riders navigate a course made up of sections of obstacles without putting their foot down or coming into contact with the ground other than with their tyres.
	Indoor Cycling	Artistic cycling: individuals, pairs or teams of four are judged on five-minute programmes comprising a series of tricks set to music. Cycle ball: 2-a-side 14-minute cycle-based ball game with rules similar to football, the exception being riders using their cycle to move the ball around and score.
	Gran Fondo	A mass participation road cycling event including time trials and road races open to the top 25% of riders from qualifying events held worldwide in the previous 12 months.

Source: UCI Cycling World Championships website

2.3 Locations

The 2023 UCI Cycling Worlds took place in 10 venues and across 14 Local Authorities throughout Scotland. Figure 3 sets out each of these host locations of the Championships, the regional context and the events it hosted during the 2023 UCI Cycling Worlds.

Figure 3: Host locations



2.4 Spectator attendance and profile

2.4.1 Attendance by event

The events varied in terms of spectator experience with a mixture of ticketed and non-ticketed events depending on the nature of the discipline – for example, this would range from c.2,000 in the Emirates Arena to watch indoor cycling, to up to 325,000 lining the route of the Men Elite road race. Total cumulative attendance at the 2023 UCI Cycling Worlds was recorded at just over 1 million¹² spectators over the 11 days of the event, c.106k of whom were ticketed. As a comparison, the 2022 Birmingham Commonwealth Games had 1.24 million ticketed spectators¹³ – which is in a broadly similar range (albeit far more formal ticketed attendees), but it is worth noting that the Commonwealth Games comprised 19 sports.

Attendance figures for ticketed events are definitive, whereas attendance figures for non-ticketed events are estimates by the Host using a range of sources to determine the estimate. Table 3 below sets out the total attendance by event and whether the event was ticketed or not.

¹² This includes accredited attendances, Go Live sites, Hospitality, Race the Worlds and the Gala dinner.

¹³ Interim Evaluation of the Birmingham 2022 Commonwealth Games, 2022 Birmingham Organising Committee for the 2022 Commonwealth Games Limited.

Table 3: Attendance by event

Date	Championships hosted	Ticketed event?	Total estimated attendance ¹⁴ (no. of spectators)
Wednesday 2 August	Opening ceremony Para-cycling Track (athletes' friend and family only session)	No	3,062
Thursday 3 August	Track	Yes	8,865
	Para-cycling Track	Yes	
	MTB Downhill	Yes	
Friday 4 August	Track	Yes	44,037
	Para-cycling Track	Yes	
	MTB Downhill	Yes	
	Gran Fondo	No	
Saturday 5 August	Road	No	55,687
	Track	Yes	
	Para-cycling Track	Yes	
	MTB Downhill	Yes	
	BMX Freestyle Park	Yes	
Sunday 6 August	Road	No	356,588
	Track	Yes	
	Para-cycling Track	Yes	
	MTB Marathon	No	
	BMX Racing	Yes	
	BMX Freestyle Park	Yes	
Monday 7 August	Track	Yes	23,028
	Para-cycling Track	Yes	
	BMX Racing	Yes	
	BMX Freestyle Park	Yes	
	Gran Fondo	No	
Tuesday 8 August	Road	No	47,813
	Track	Yes	
	Para-cycling Track	Yes	
	MTB Cross-country	No	
	BMX Racing	Yes	
	BMX Freestyle Flatland	No	
Wednesday 9 August	Road	No	36,853
	Para-cycling Road	No	
	Track	Yes	
	MTB Cross-country	Yes	
	BMX Racing	Yes	
	BMX Freestyle Flatland	No	
	Trials	No	
Thursday 10 August	Road	No	47,599
	Para-cycling Road	No	
	MTB Cross-country	Yes	
	BMX Freestyle Flatland	No	
	Trials	No	
Friday 11 August	Road	No	62,885
	Para-cycling Road	No	
	MTB Cross-country	Yes	
	Trials	No	
	Indoor Cycling	Yes	
Saturday 12 August	Road	No	77,568
	Para-cycling Road	No	
	MTB Cross-country	Yes	
	BMX Racing	Yes	
	Trials	No	
	Indoor Cycling	Yes	

¹⁴ These are total attendance figures – not unique individuals.

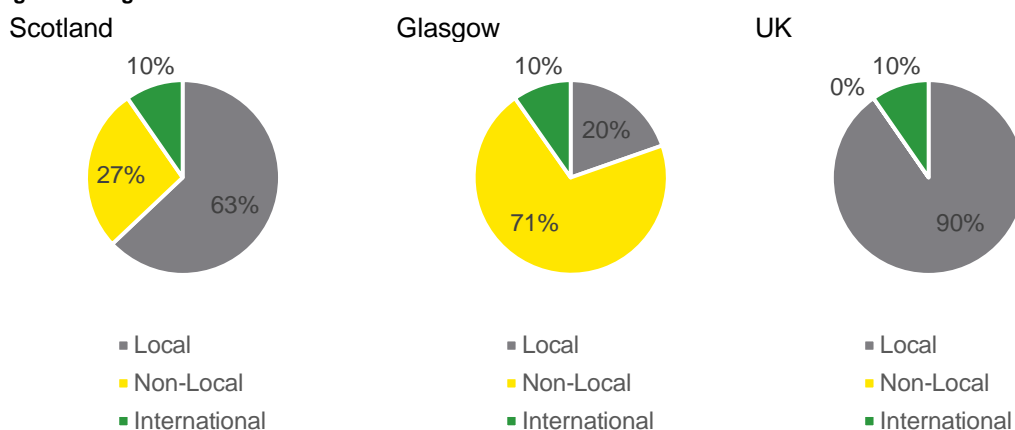
Date	Championships hosted	Ticketed event?	Total estimated attendance ¹⁴ (no. of spectators)
Sunday 13 August	Road	No	149,896
	Para-cycling Road	No	
	BMX Racing	Yes	
	Indoor Cycling	Yes	
Total			913,881 ¹⁵

Source: Host

2.4.2 Origin of attendees

Figure 4 sets out the origin of attendees from the point of view of Glasgow, Scotland and UK visitation. This is based on surveys of spectators carried out during and after the 2023 UCI Cycling Worlds (further detail on the survey methodology is provided in the Appendix).

Figure 4: Origin of attendees



Source: EY analysis

Analysis of spectator surveys suggests that an estimated 338,000 attendees travelled from outside of Scotland from 54 countries, or c.37%. The comparable average from 15 other cycling events that EY has carried out an economic impact study for is 38%, suggesting that inbound visitation at the 2023 UCI Cycling Worlds was similar to recent, comparable UCI events. Of these 338,000 spectators, around 249,000 travelled from elsewhere in the UK, while the remaining 89,000 were international spectators. The majority of international spectators travelled from Europe (58%), with a further 21% from North America and another 12% from Oceania. In terms of countries of residence of spectators, the top five were the USA (16%), France (11%), Germany (9%), Belgium (9%) and Australia (8%). Collectively, these five countries accounted for 53% of international spectators.

In comparison to other UCI events, the 2023 UCI Cycling Worlds total attendance of non-local and international spectators was five times higher than the average of other UCI events hosted in European cities in EY's database of economic impact studies. In addition, the 2023 UCI Cycling Worlds attracted a higher proportion of non-local attendees on average as 71% of attendees were non-locals, compared to a European host city average of 39%. However, these comparisons should be placed in context. The scale of the 2023 UCI Cycling Worlds was also significantly larger than the other events considered in this comparison. However, it does demonstrate the advantages of hosting an event of this scale and the benefits that Glasgow and Scotland have gained as a result.

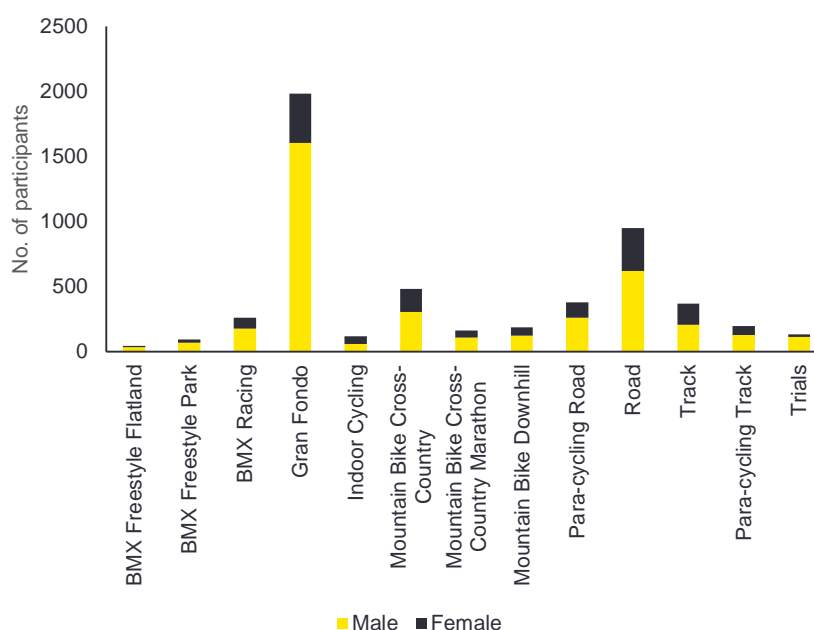
¹⁵ This excludes accredited attendances, Go Live sites, Hospitality, Race the Worlds and the Gala dinner.

The spectator surveys suggest that, on average, spectators attended 3.2 days of the event. The highest attendance was on Sunday 6 August, which coincided with the BMX Freestyle (Glasgow Green), BMX Racing (BMX Centre, Glasgow), MTB Cross-country (Glentress), Para-cycling Track (Sir Chris Hoy Velodrome, Glasgow), Road (Edinburgh start and Glasgow finish), and Track (Sir Chris Hoy Velodrome, Glasgow) events, with over 356,000 spectators that day.

2.5 Participant profile

The 2023 UCI Cycling Worlds saw 7,061 competing athletes take part in total, originating from 131 competing nations from five continents. Overall, 29% of the competing athletes were female and 435 athletes were para-cyclists. Figure 5 shows a breakdown of participants by event and gender. The Road, Gran Fondo and Mountain Bike Cross-country events had the highest number of female athletes, with 889 female athletes participating in these events – c.43% of the total female participants at the 2023 UCI Cycling Worlds.

Figure 5: Participants profile by event and gender



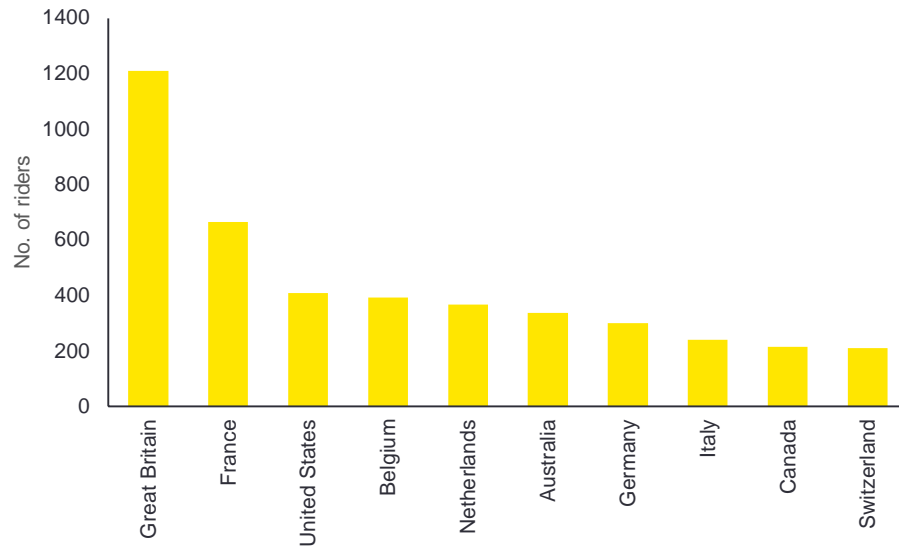
Source: UCI

Gran Fondo was the event with the most participants – with 32% of the total participants pool competing in the event. This was followed by Road, which included 23% of participants. The third most participated event was Mountain Bike Cross-country, comprising 11.4% of participants, closely followed by Para-cycling Road at 10.5%. Notably, with the exception of Gran Fondo, the most popular UCI Cycling Worlds events – particularly BMX Racing, Mountain Bike, Road and Track – are Olympic events. The 2023 Cycling Worlds played a key role as a qualifier for the 2024 Paris Olympic Games and Paralympic Games.

At a national level, athletes from 109 countries participated in the road race, which translates to an 84% representation of all participating nations in the event. This was followed by Gran Fondo and Mountain Bike Cross-country, which saw participation from 64 countries and 61 countries, respectively.

Although there were a total of 131 competing nations, the majority of participants were highly concentrated in a small number of countries: the top 10 countries were responsible for 61% of athletes, with 17% from Great Britain alone. These trends are reflective of Scotland and the UK being the host as well as which countries cycling is most popular in. Figure 6 shows the distribution of athletes in the top 10 countries.

Figure 6: Number of riders from the 10 largest national teams



Source: UCI

The largest proportion of athletes were from European countries, representing 68% of total athletes. 17% of athletes travelled from the Americas and 15% from Oceania (7%), Asia (5%), and Africa (3%).

3. Social contribution

The 2023 UCI Cycling Worlds aimed to engage new audiences for cycling, as well as be a catalyst for change to deliver long-lasting impacts for society (e.g., investment in cycling facilities, long-term health benefits, promoting tourism in Scotland, etc.). These goals were to be achieved by, among others, promoting inclusiveness and accessibility among audiences, encouraging the use of active travel, establishing itself as a world-class sporting event, inspiring a sense of civic pride across Scottish residents, and facilitating investment across all Local Authorities.

This section has captured evidence in relation to the benefits felt by wider society and can be categorised into five outcome areas:

1. Equality, Diversity and Inclusion (EDI) – this includes engaging people from diverse backgrounds and ensuring everyone feels welcomed and valued;
2. Health and wellbeing – this includes any benefits that come from physical activity;
3. Sport excellence – this includes delivering a world-class cycling event;
4. Community – this includes benefits driven by bringing the community together through the power of the bike; and
5. Lasting impacts – those impacts that are felt two, five and ten years post-event.

There have been numerous impacts generated by the 2023 UCI Cycling Worlds under each of these categories, some of whose benefits have been felt already, and some that will have a longer-lasting impact. A summary of impacts is presented in Section 7. The following sub-sections draw out highlighted statistics from our research.

3.1 Equality, Diversity and Inclusion

EDI ambitions appear to have been achieved; 97% of spectators felt the Championships were inclusive and 93% of spectators with long-standing physical or mental impairments, illness or disability felt the event was accessible.

The 2023 UCI Cycling Worlds had several objectives relating to EDI, including ensuring the event was accessible and inclusive for all client groups, and targeting and engaging a more diverse non-core cycling audience. While the vast majority (95%) of spectators were white, this is broadly in line with the demographic profile of Scotland. The latest census data available (2011) found that Scotland's population was 96% white, while Asian, African, Caribbean or Black, Mixed or Other ethnic groups accounted for 4% of the population¹⁶. Despite this, the 2023 UCI Cycling Worlds did appear to attract a gender-diverse new audience. As Figure 7 and Figure 8 illustrate, 16% of spectators were new to cycling (i.e., those who stated they never or rarely watched cycling events before the 2023 UCI Cycling Worlds). Further, 49% of this new audience was female, showing the event's success in increasing the diversity of the cycling fan base. The workforce of the 2023 UCI Cycling Worlds also successfully hit EDI targets, with 10% of volunteers coming from the most deprived areas of Scotland.

¹⁶ <https://www.scotlandscensus.gov.uk/census-results>

Figure 7: How often did spectators watch cycling?

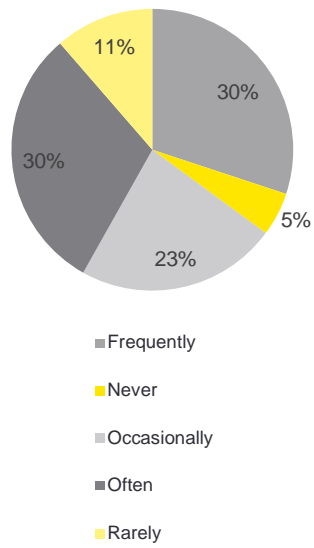


Figure 8: Gender of new audience

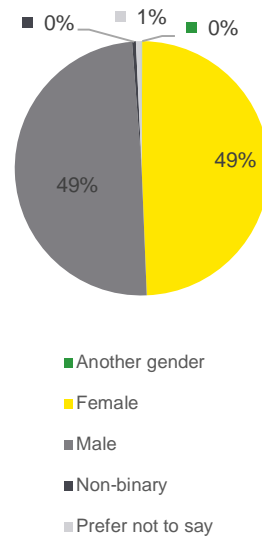


Figure 9: Ethnicity profile of spectators

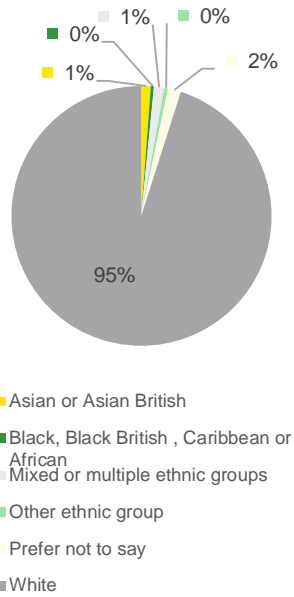


Figure 10: Gender profile of spectators

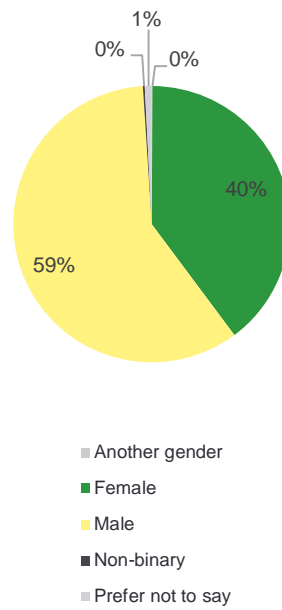
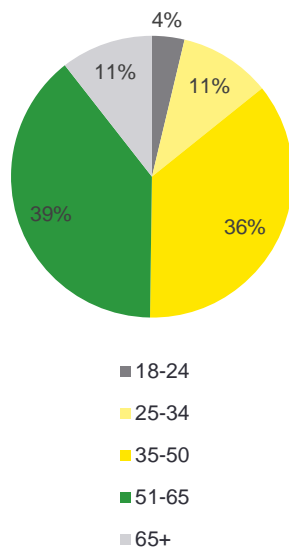


Figure 11: Age profile of spectators¹⁷



Source: EY Analysis

The Host have separately commissioned an independent EDI Report that contains detail on the vision, structure and governance of EDI in relation to the 2023 UCI Cycling Worlds, the impacts, and lessons learned. This is available to view on the [UCI website](#).

3.2 Health and wellbeing

82% of respondents used a form of active travel (i.e., walking, running or cycling) during the 2023 UCI Cycling World Championships, indicating it successfully championed the power of the bike in encouraging the use of active travel.

A major sporting event such as the 2023 UCI Cycling Worlds has the potential to encourage audiences to participate in physical activity, which in turn drives health and well-being benefits. As well as encouraging the use of active travel, another key aim of the event was to inspire local residents to do more sport/physical activity; Figure 12 shows 79% of Scottish spectators were at least somewhat inspired to cycle more; of the spectators who didn't cycle before the event, 55% were inspired to take up cycling at least somewhat. Further, Figure 13 shows 52% of spectators were likely or very likely to increase their use of active travel. This suggests the 2023 UCI Cycling Worlds were successful in advancing one of the key health and well-being initiatives targeted pre-event.

¹⁷ Note, only spectators over the age of 18 participated in the survey

Figure 12: Scottish attendees inspired to cycle more

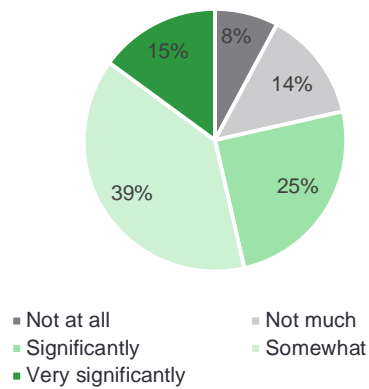
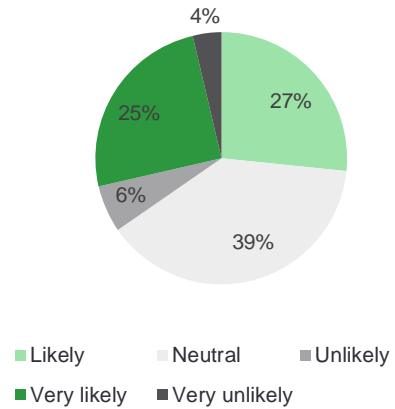


Figure 13: Spectators likely to increase active travel



Source: EY Analysis

3.3 Sport excellence

93% of teams agreed that the 2023 UCI Cycling Worlds was a world-class event, meeting the first overarching objective.

The first overarching objective of the Championships was to deliver an innovative, world-class event that provides a model for the future. This meant combining 13 Championships to create the most prestigious, international showcase of the world’s best cyclists and ensuring fair, authentic competition. Across the Championships there were 220 UCI World Championship titles awarded, as well as 807 medals awarded to athletes. There was 79% satisfaction among individual entrants and 89% among competing nations.

Further, event satisfaction was high among all spectators, with locals slightly more satisfied than non-local and international attendees. 80% of local residents were “very satisfied”, compared to 77% of all 8,886 respondents to the survey. Overall, the 92% of total attendees who were “satisfied” or “very satisfied” is a very strong endorsement of the Championships and Scotland as a host. The findings are shown in more detail in Figure 14 and Figure 15 below.

Figure 14: Event satisfaction among Scottish residents

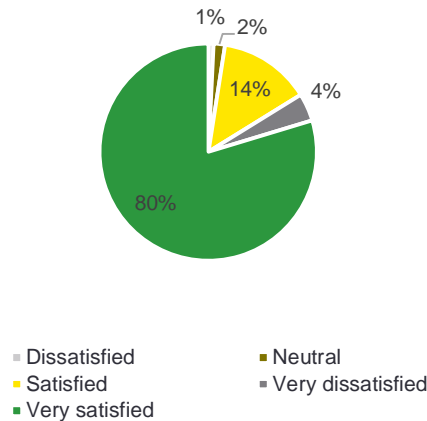
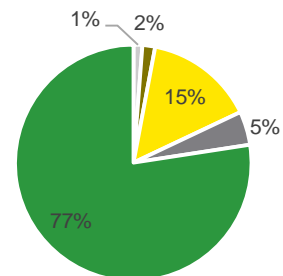


Figure 15: Event satisfaction among non-local and international spectators



Source: EY Analysis

3.4 Community

27% of volunteers wanted to be involved with the 2023 UCI Cycling Worlds to gain new skills; this was achieved with over 11,000 hours of training completed by volunteers.

Hosting a mega sporting event such as the 2023 UCI Cycling Worlds can bring a community together, both in terms of engagement and comradery. In planning the Championships, several objectives were discussed that would drive positive benefits for the local communities. These included delivering a skilled, committed and passionate workforce (achieved as 11,176 hours of training were completed by volunteers) and embedding agreed policy priorities relating to community, activations and investment (to date, over £6 million has been invested in cycling facilities across all 32 local authorities in Scotland¹⁸).

As Figure 16 shows, 77% of Scottish residents agreed they were very significantly proud that Scotland was hosting the 2023 UCI Cycling Worlds, while a further 18% of Scottish residents were significantly proud. In total, this implies 95% of Scottish residents held a positive outlook on Scotland’s host status of the 2023 UCI Cycling Worlds. 4% of residents neither agreed or disagreed and only 1% felt no sense of pride that the event took place in their hometown. These findings are a strong demonstration of the success of the event in generating civic pride for the event. Figure 17 demonstrates the success of the Championships in bringing together the community; 60% of spectators felt the Championships allowed them to develop their social networks, by talking to friends, colleagues and neighbours.

Figure 16: Event pride

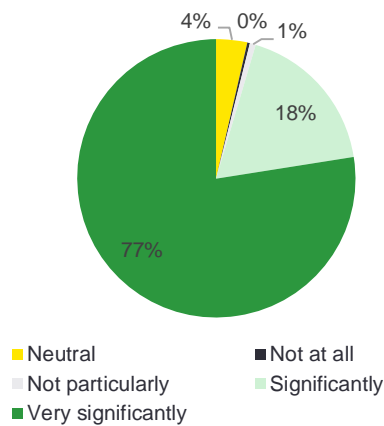
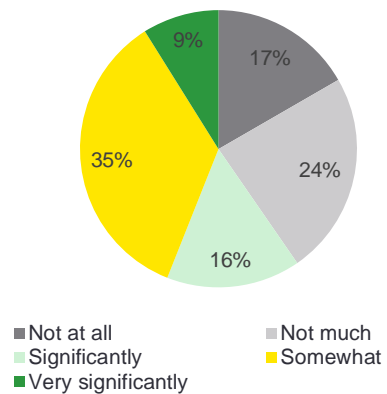


Figure 17: Developing social networks



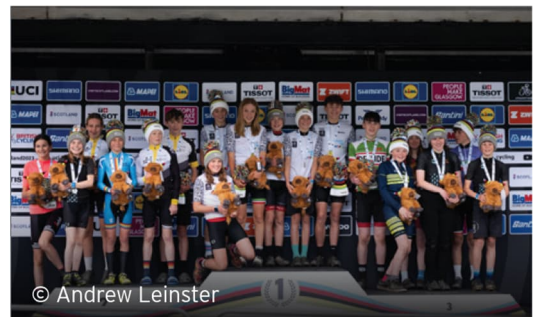
Source: EY Analysis

¹⁸ To help deliver lasting impacts and benefits for communities from the 2023 UCI Cycling Worlds, additional investments were made available. Amongst others, this included the £8m Cycling Facilities Fund and the £1m Community Cycling Fund supporting sustainable cycling projects and events.

The 2023 UCI Cycling Worlds provided an opportunity for delivery partners to enable activations¹⁹ that directly contributed to the local community. Across the 11 days of the Championships, official Activation and Legacy partner, Scottish Cycling, worked in conjunction with all six event delivery partners to deliver 24 activations on site as well as an additional 16 activations in the local areas. An example of the activations is set out as a case study below:

Ride The Worlds, Scottish Cycling

Through a multi-faceted delivery model, Scottish Cycling's Ride the Worlds programme provided young people from across Scotland, and their families, with the opportunity to connect to the 2023 UCI Cycling World Championships, experience the thrill of a World Championship race and have a taste of racing themselves. All with the aim of inspiring and empowering them to start cycling, cycle more, and/or make cycling a sport for life, deliver a long-lasting impact and developing a nation of cyclists.



The Ride the Worlds programme delivered a total of 110 events across Scotland to 4,963 participants. This was against a target of 78 events to 4,000 participants across the four areas of the programme. It engaged new clubs and partners and delivered across multiple disciplines, ensuring participants had easily accessible opportunities to experience different types of cycling and fully realise the power of the bike.

Alongside activations, the Championships supported several charitable initiatives, an example of which is provided below:

World Bicycle Relief

World Bicycle Relief believes in the Power of Bicycles and the life-changing impact they can have to help individuals and communities thrive. So many individuals recognise the role that bicycles have played in their own lives and make the immediate connection to how they can impact the lives of others around the world.

We were delighted to work with the 2023 UCI Cycling World Championship, and with four female World Championship athletes across brands and disciplines, to highlight that whether chasing a World Championship jersey or chasing an education, a bicycle is the throughline! As World Bicycle Relief looks to reaching our 1m bikes distributed milestone, we know that the audience we were able to engage through the Championships will be critical to helping reach this goal.

Overall, the community impacts generated from hosting the Championships were significant and far reaching; several objectives appear to have been achieved.

¹⁹ This refers to the strategies used to create a memorable experience for attendees. This can include anything from interactive installations and engaging social media campaigns to on-site activities and live performances.

3.5 Lasting impacts

91% of spectators are likely to recommend Scotland as a holiday destination to friends, family and colleagues.

The fourth overarching objective of the 2023 UCI Cycling Worlds was to lead the coordination of a “one Scotland” approach and be a catalyst for positive change, indicating impacts that are felt not just immediately after the Championships but two, five, ten years in the future. Given this report has been prepared only four months post event, there is little that can be done to quantify these impacts at this time. However, several findings indicate that impacts may be longer lasting. For example, section 3.2 highlights how the Championships have inspired people to cycle as well as to increase their active travel. The health benefits that are driven by physical activity are long-term, as regular exercise can aid brain health, heart health, cancer prevention, healthy weight, bone strength, and balance and coordination²⁰. Section 4.1 sets out the digital reach of the Championships; combining 13 World Championships into one event has driven a more substantially stronger impact than for previous events when the UCI World Championships have been held separately. Around 200 million hours were watched live on television globally over 11 days of the competition – this was 78% more hours watched than the combined average for a typical year of separate UCI World Championships between 2017 and 2022. This may help raise the profile of cycling more than individual Championships would, attracting an entirely new set of fans to the sport.

Additionally, the Championships successfully promoted Scotland as a tourism destination, as Figure 18 and Figure 19 show. 86% of non-local and international tourists were “likely” or “very likely” to return to Scotland in the future for a holiday as a result of this trip, and 91% were “likely” or “very likely” to recommend Scotland as a holiday destination to friends, family and colleagues. The impacts of this are likely to be seen in the coming years.

Figure 18: Likely to return to Scotland for a holiday

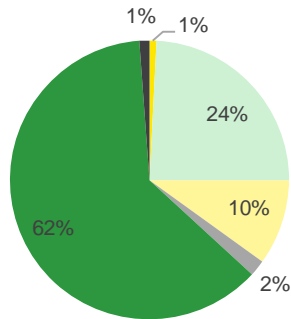
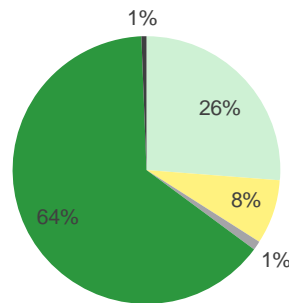


Figure 19: Likely to recommend Scotland as a holiday destination



■ Don't know ■ Likely ■ Neutral
■ Unlikely ■ Very likely ■ Very unlikely

Source: EY Analysis

Further, a national Policy Advisory Group was created for the Championships, bringing together partners to coordinate a long-term national policy framework for cycling. All 21 stakeholders that we interviewed had appreciated the joined-up approach that the event took, and felt that this, or a similar forum, led by the Scottish Government should continue to further capitalise on the success of the Championships. In general, 93% of stakeholders fed back that they intend to continue activities put in place as part of the 2023 UCI Cycling Worlds, particularly in relation to EDI commitments.

²⁰ Centres for Disease Control and Prevention, UK Government

These findings demonstrate the Championships' success in creating opportunities for lasting impacts in the future.

3.6 Disbenefits of the event

For a balanced assessment of an event, it is also important to understand and acknowledge any disbenefits that arose as a consequence of the event. Given the nature of the 2023 UCI Cycling Worlds, these were likely to primarily relate to the disruption caused to local businesses and residents, as transport and road networks were disrupted, as well as from noise pollution, and any clean-up required post-event; this is not dissimilar to the Commonwealth Games held in 2014. Whilst these impacts are not quantified within this study, we note that feedback from stakeholders has indicated there were negative impacts including road closures causing significant upheaval, leading to challenges in engagement from some local communities. The communication of road closures will also have been important. These disruptions seemed particularly significant in Glasgow, where roads were closed from Friday 4 August until Tuesday 8 August, and then again on Saturday 12 August and Sunday 13 August for the road race.

The disbenefits caused by disruption to traffic is common to sporting events, although the disruption caused by the 2023 UCI Cycling Worlds is likely to be more extensive given the duration and location of race routes. However, these disbenefits should also be considered in light of the types of disbenefits observed from other sports, for example football. There, previous events have seen disbenefits such as anti-social behaviour, which carries implications on, for example, policing required and also significantly more post-event clean-up from littering etc..

It is likely that some of the economic activity that was disrupted over the course of the Championships will have been displaced to periods prior or following the Championships, rather than being lost.

4. Economic contribution

The 2023 UCI Cycling Worlds had a number of economic goals, including generating new revenue streams, engaging a global audience and promoting Scotland as a tourism destination. The event had close to a million attendees, over a third of whom travelled from outside Scotland, from five continents. Spending by spectators, teams and media provided a significant boost to local businesses, an example of which is included below.

Case Study: MacDonald Cardrona Hotel, Scottish Borders

The MacDonald Cardrona is a four-star 99 room Hotel, Golf & Spa situated in Peebles, which hosted the Italian team during the Championships, as well as other attendees.

In what ways did your business/organisation benefit from the Championships?

“Our rooms side of the business was full and was beneficial, but our food and beverage element was negatively affected as they did not dine with us”

Do you think other local businesses benefited from the Championships?

“Yes, in general the town seemed to be a lot busier than normal”

Do you have any comments regarding Scottish Borders Council’s role in hosting the Mountain Bike events in Glentress Forest as part of the Championships?

“I think the event was very beneficial for the area and certainly something which can be seen as a positive. Any other Championships would be good for the area”

Further detail can be found in James Law Research Associates’ Economic and Social Impact Evaluation, available on the Scottish Borders Council website.

This section provides detail on the global reach of the event and the GVA and employment it supported in Scotland, Glasgow and the rest of the UK. It provides an insight to the main drivers of these impacts and how the impacts compared with other cycling and sporting events, concluding with a view on how well the event met its economic contribution objectives.

4.1 Global reach of event: broadcasting and social media impacts

In aiming to create the most prestigious, international showcase of the world’s best cyclists, an innovative broadcast strategy was put in place that recognised the changing digital landscape. This included KPIs regarding traditional digital broadcasting methods (i.e., number of views, broadcasting hours covering women’s and para-cycling events, global audiences, etc.), as well as social media coverage (i.e., reach, impressions, number of platforms). This section highlights metrics that evidence how these aims were achieved.

4.1.1 Event broadcast

The 2023 UCI Cycling Worlds were broadcast in 130 countries, totalling around 14,000 hours of programming. Around 200 million hours were watched live on television globally over 11 days of competition – this was 78% more hours watched than the combined average for a typical year of separate Championships between 2017 and 2022. This is evidence that hosting the 13 UCI World Championships under one event title in this un-precedented mega-event was a much more impactful showcase for the sport than the individual Championships.

Dedicated (i.e., live) coverage audience increased by 97% compared to European events between 2017 and 2022. The 2023 UCI Cycling Worlds were watched by one in seven Europeans and there was a peak audience of 1m viewers for the Mountain Bike Downhill on BBC One. The Championships also saw 2.4 million live stream views on the BBC’s digital platform and had 11.9 million views on the BBC in total.²¹

²¹ Source: Source: Nielsen – UCI Cycling World Championships 2023 Full Event Report, October 2023

4.1.2 Social media coverage

The 2023 UCI Cycling Worlds also had a significant impact on social media. In total, the 2023 UCI Cycling World Championships reached 28.6 million people through their own social channels. The event also had 4 million views of the event website, 20.6 million video views, 601 million people reached through mentions on social media. The event had 1,000 items of global press coverage reaching over 1.5 billion people, with an 81% positive sentiment in media coverage. The Championships had 1.9 billion unique impressions of the #glasgowscotland2023 and #powerofthebike tags on social media, and the event also had a 24% net positive sentiment across social media.²²

The UCI's social media channels also saw significant impact, with 245.2 million impressions, 7.2 million engagements, 88.7 million video views and 1.4 million website visits. It's important to note that there is likely to be cross-over between the two social media channels (i.e., one person would visit both the Host and UCI websites), however, it is clear that the combination created a content plan that was complementary and appeared to drive increased social engagement.

The new format of hosting 13 UCI World Championships in one location may have also potentially generated more social media activity around the event. For example, the single event format of the 2022 UCI Road World Championship in Wollongong saw 36.1 million impressions on social media.

This level of social media engagement may help in growing the sport worldwide, as well as creating future benefits for Scotland through the profile it received as the host.

4.2 Tourism and other impacts: GVA and employment

4.2.1 Approach

The GVA and employment impacts from event related spending have been quantified for Scotland, Glasgow and the rest of the UK. The impacts on Scotland are the primary focus of this report. It should be noted that each of the Scotland, Glasgow and UK impacts consider only impacts that are additional to those economies. This means that the Glasgow impacts include spending impacts from spectators from the rest of Scotland, the rest of the UK and international spectators; the Scotland impacts include spending impacts from spectators from the rest of the UK and international spectators and finally the UK impacts include only spending impacts from international spectators.

Figure 20 The below sets out the framework for measuring the GVA and employment impacts. The impacts are captured from four distinct types of spending:

1. **Event delivery** – this is the capital and operational expenditure that helped deliver the 2023 UCI Cycling Worlds.
2. **Spectator spending** – this is spending in the wider economy driven by the number of spectators to the Championships, the origin of spectators and their spending patterns.
3. **Media persons spending** – this is spending in the wider economy driven by the number of media staff that covered the Championships and their spending patterns.
4. **Team's participants spending** – this spending in the wider economy driven by the number of team members at the Championships, the origin of team members and their spending patterns.

For each of these spending types, GVA and employment impacts have been estimated in terms of direct, indirect and induced impacts, measured as follows:

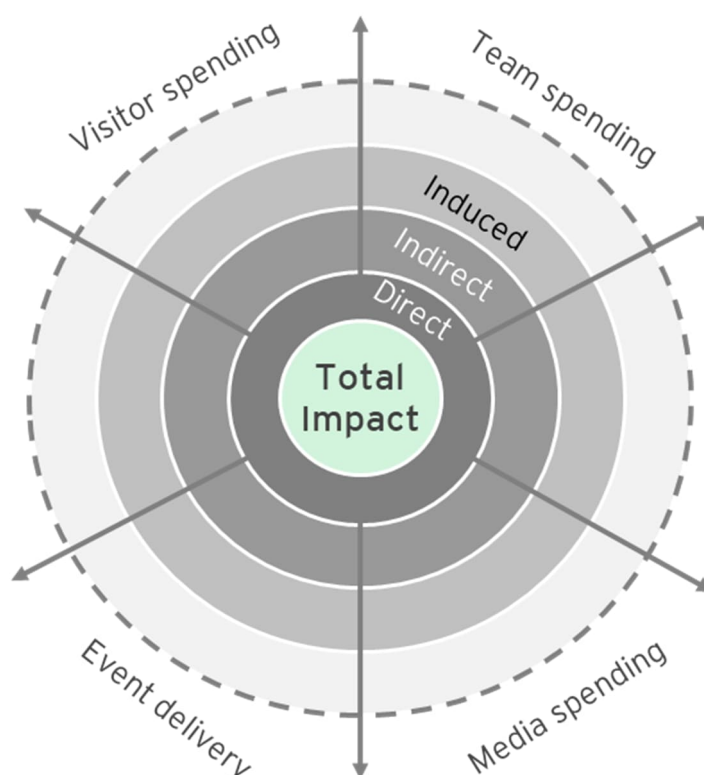
²² Source: Ace Media, Falcon.io, Brandwatch

1. **Direct:** resulting from spending directly related to the Championships in Glasgow, Scotland and rest of UK such as employment at the event and tourism spending
2. **Indirect:** representing the activity supported within relevant local supply chains
3. **Induced:** resulting from the increased employment income, a proportion of which is then spent throughout the economy.

We have an established economic impact assessment (“EIA”) methodology that has been used to calculate the economic impact of the Championships. This has been corroborated with the eventIMPACTS methodology, co-developed by UK Sport.²³ A detailed explanation of our methodology is provided in Appendix 7.1. It is important to note that there are economic disbenefits associated with the delivery of the event, that may well have been non-negligible, and that are not included in this quantified economic impact. These are discussed qualitatively in Section 3.6.

In section 4.2.2, we set out detail on the four drivers of impacts set out above.

Figure 20: Economic impacts by spending type



4.2.2 Drivers of economic impacts

4.2.2.1 Event delivery

Total direct event delivery spend was £5.15 million²⁴. This comprised total international official expenditure; UCI launch spend by industry; investment and event partners activation spend. The majority of spend was incurred in accommodation services, with sports services and amusement and recreation services and advertising and market research services also

²³ Deadweight, displacement and leakage factors have been considered. Further detail is included in Section 7.1.1.

²⁴ Spend originating from government partners is excluded from this analysis.

receiving a significant spending boost. While delivery spend is the smallest source of economic impacts, the spending on local suppliers nonetheless generated an economic benefit to Glasgow, Scotland and the UK.

4.2.2.2 Spectator spend

As set out in section 2.4, spectator surveys suggest that an estimated 338,000 attendees travelled from outside of Scotland, with 249,000 having travelled from elsewhere in the UK and 89,000 having travelled from outside the UK. These travellers generated significant incremental spending – revenues for local businesses, particularly in the accommodation, food and drink, transport, retail and tourism sectors.

Figure 21 and Figure 22 below show the average spend per night by (i) non-local and (ii) international spectators in Glasgow, Scotland and the UK. The results suggest some common trends across both types of spectators: accommodation received the highest spend per person per night from both non-local and international spectators, followed by food and drink and then transport. The average spend by international tourists in these three categories was consistently higher than non-local spectators. This is likely reflective of the nature of tourists traveling from abroad, as they may have combined attending the 2023 UCI Cycling Worlds with plans to experience Scotland and UK as a tourist destination. In contrast, the non-local spectators may have visited mainly for the event. This is reflected in the duration of stay survey averages in Table 4: international spectators stayed consistently longer in Glasgow and Scotland than non-local spectators.

Compared to previous events, spending per night by international tourists in Scotland was lower. Considering economic impacts of a sample of 15 single format cycling world championship events (detailed in Table 14 **Error! Reference source not found.**) in the UK and Europe carried out by EY, the average spending by international tourists per night in Scotland was 17% lower²⁵. However, tourists did stay longer, and in total this resulted in £136m of spending in Glasgow; £220m of spending in Scotland and £127m of spending in the UK. This means that Glasgow, Scotland and UK reaped the benefits of the longer duration of the event and the large number of UCI World Championships that took place simultaneously. In this light, the Championships can be considered successful in generating economic benefit from spectator spend – as well as from the benefits of showcasing Scotland as a tourist destination.

Figure 21: Average non-local spectator spend per person per night (£) at Championships

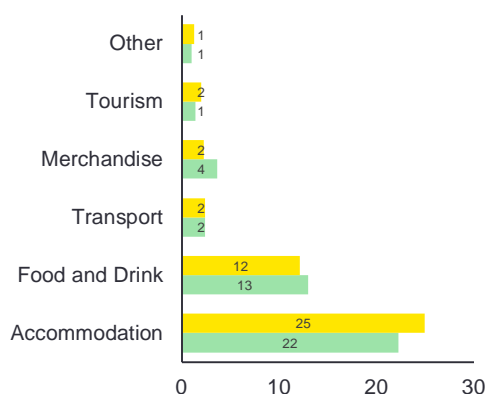
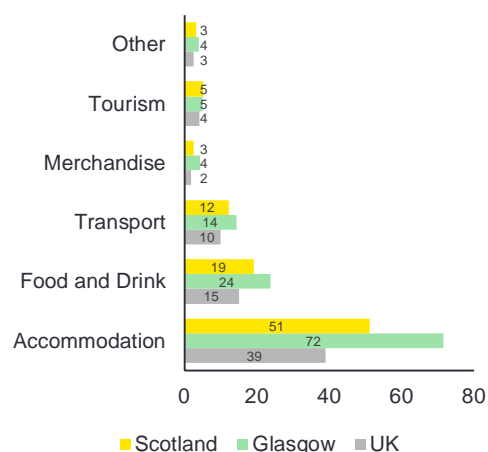


Figure 22: Average international spectator spend per person per night (£) at Championships



Source: EY analysis

²⁵ Anecdotal findings from the survey period suggest that several spectators opted for cheaper accommodation alternatives such as staying elsewhere and commuting into Glasgow as well as camping in the Scottish Highlands, which could partly explain the lower spending by international spectators.

Table 4 summarises the average number of nights stayed in Scotland by tourist type and purpose of visit (i.e. visitors who primarily visited Scotland for the 2023 UCI Cycling Worlds). On average, international spectators are estimated to have spent 48% more nights in Scotland compared to non-local spectators, reflecting time spent in Scotland before and after the event.

Table 4: Average length of stay for spectators at 2023 UCI Cycling Worlds

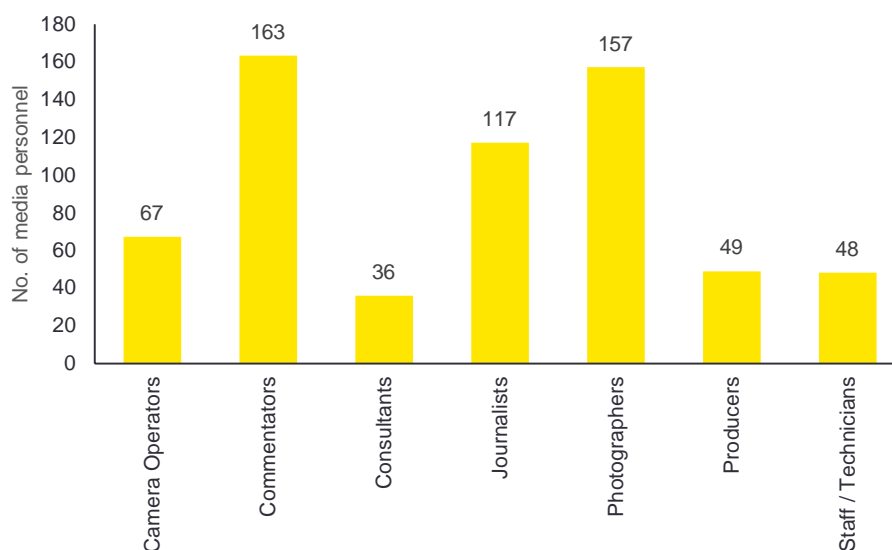
Geographical Unit	Origin	Length of stay (days)
Scotland	Non-local	9.3
	International	13.8
Glasgow	Non-local	3.8
	International	6.6
UK	Non-local	
	International	19.6

Source: EY analysis

4.2.2.3 Media presence and spend

In total, 637 media persons from 31 countries covered the 2023 UCI Cycling Worlds. Over 50% of media persons were commentators and photographers, with journalists forming the next largest contingent of media persons – a full breakdown by type of media person is provided in Figure 23 below.

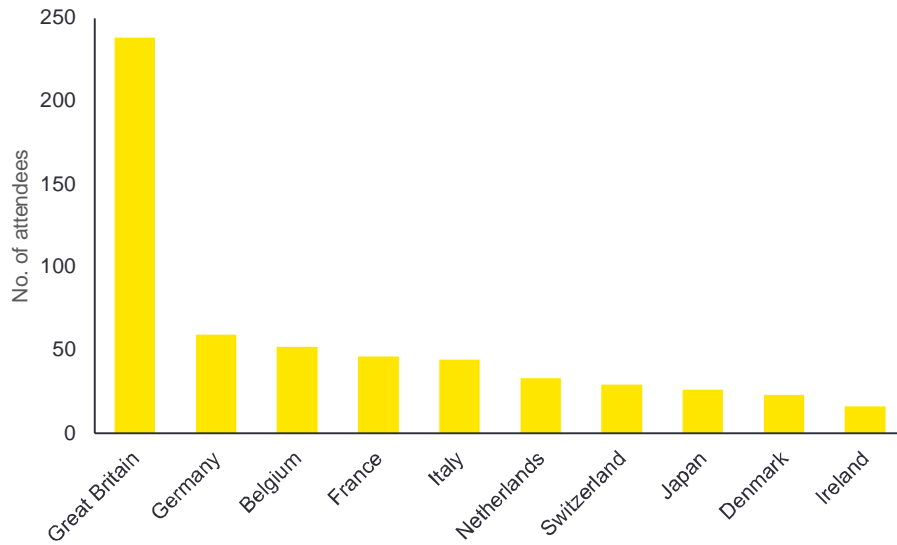
Figure 23: Media attendance at 2023 UCI Cycling Worlds



Source: UCI

Figure 24 provides a different view on media persons by breaking down the contingent by country of origin. Approximately 90% of the media staff were from Europe; with media from United Kingdom (37%), Germany (9%), and Belgium (8%) providing a significant portion of the media persons – likely reflecting both local interest in the event as well as the popularity of cycling in Germany and Belgium.

Figure 24: Media persons by country of origin



Source: UCI

Figure 25: Average non-local media spend per person per night at 2023 UCI Cycling Worlds

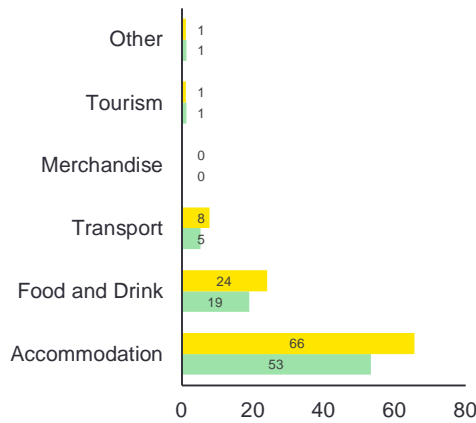


Figure 26: Average international media spend per person per night at 2023 UCI Cycling Worlds



Source: EY analysis

Figure 25 and Figure 26 show the average spend per person per night of media persons by (i) non-local media persons and (ii) international media persons. Note, this does not include any company broadcasting spend, rather it captures the spend from media personnel while in Scotland. Both non-local and international staff consistently spent most on accommodation, food and drink and transport. However, on average, international media staff spent £338 per person per night in Glasgow. This is materially higher than the average spend of £53 per person per night for non-local media persons and may reflect the different types of organisations and available budgets. A similar trend is observed for spending in Scotland.

In total, the incremental spending from visiting media persons, both non-local and international, in Scotland was £1.7m. The corresponding figure from the Glasgow and UK lens was £1.5m and £1.6m respectively. This spending generates economic benefits to a number of sectors, but in particular accommodation given the breakdown of spending.

Table 5 below shows the average duration of stay for non-local and international media persons in Glasgow, Scotland and the UK. The international media persons' length of stay in both Glasgow and Scotland was higher than non-locals, particularly so in Scotland, where international media persons stayed in Scotland for 32% longer than non-locals. This may reflect some additional time spent for leisure compared to non-local media persons.

Table 5: Average length of stay for media persons at 2023 UCI Cycling Worlds

Geographical Unit	Origin	Length of stay (days)
Scotland	Non-local	11.9
	International	15.7
Glasgow	Non-local	7.0
	International	8.6
UK	Non-local	
	International	16.7

Source: EY analysis

4.2.2.4 Teams and individual entrants spend and duration of stay

Figure 27: Average non-local teams spend per person per night (£) at 2023 UCI Cycling Worlds

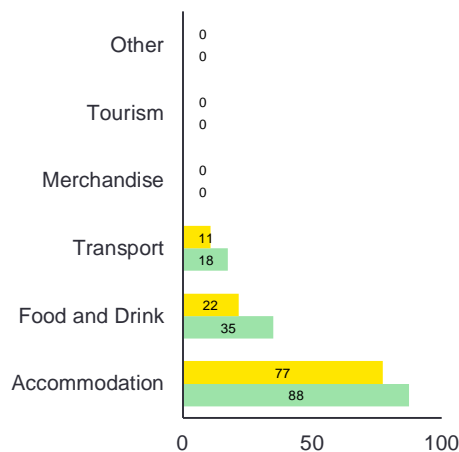
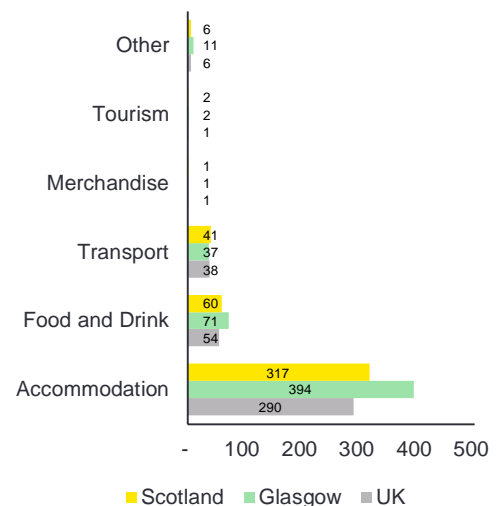


Figure 28: Average international teams spend per person per night (£) at 2023 UCI Cycling Worlds



Source: EY analysis

In total, participants and their supporting teams accounted for c.11,300 attendees. When referring to teams spending throughout this section and report, we refer to spending of all participants and their supporting teams.

Figure 27 and Figure 28 show average spending per night by non-local and international teams. Similar to spectators and media spend, the three highest spending categories for both groups of teams were accommodation, food and drink and transport. However, non-local teams had no self-reported spend in the tourism, merchandise, and other spending categories – spending by international teams in these categories was higher.

In total, analysis of the team spending surveys suggests that incremental team spending in Scotland is estimated to have reached £56.3m and spend incurred by individual entrants totalled £3.3m. In Glasgow, the survey results suggest teams' spending in Glasgow was an estimated £35.3m and individual entrants incurred an estimated £1.6m. The corresponding

figures for the UK lens was an estimated teams spend of £65.3m and a further £3.8m for individual entrants.

The average spend per person from non-local and international teams is estimated to have been £110 and £426 per person per night respectively in the Championships.

Table 6 below shows the average length of stay for teams in the 2023 UCI Cycling Worlds. On average, the length of stay for non-local teams was higher than international teams in both Glasgow and Scotland.

The lengths of stay partially reflect the days spent in Glasgow and Scotland for the events. The nature of 2023 UCI Cycling Worlds, in which multiple individual UCI World Championships were held combined is likely to have lowered the “per-event” cost for teams for expenditure on flights and accommodation, for example, compared to single-event championships – as the expenditure was spread across multiple events.

Table 6: Average length of stay for teams at 2023 UCI Cycling Worlds

Geographical Unit	Origin	Length of stay (days)
Scotland	Non-local	17
	International	15.3
Glasgow	Non-local	10
	International	7.9
UK	Non-local	
	International	20

Source: EY analysis

4.2.3 Total economic impacts by location

As set out in Section 4.2.1, the delivery spend, spectator spend, media spend and teams spend all generate economic impacts for Glasgow, Scotland and the UK. These impacts, quantified in terms of GVA and employment, are driven by the spending estimates reported in section 4.2.2. Table 7 sets out the results, segmented by direct, indirect and induced impacts.

Table 7: Economic impacts by location

	Direct	Indirect	Induced	Total
Scotland				
Output (£)	£225m	£60m	£59m	£344m
GVA (£)	£138m	£31m	£36m	£205m
Employment (FTEs²⁶)	4,307	494	484	5,285
Glasgow				
Output (£)	£141m	£38m	£37m	£216m
GVA (£)	£87m	£15m	£27m	£129m
Employment (FTEs)	2,702	290	321	3,312
UK				
Output (£)	£159m	£112m	£154m	£426m
GVA (£)	£81m	£51m	£82m	£214m
Employment (FTEs)	3,255	1,509	1,114	5,878

²⁶ In order to enable a comparison to other sectors or to events that take place over different timescales, employment figures are reported as Full Time Equivalent (“FTE”) jobs.

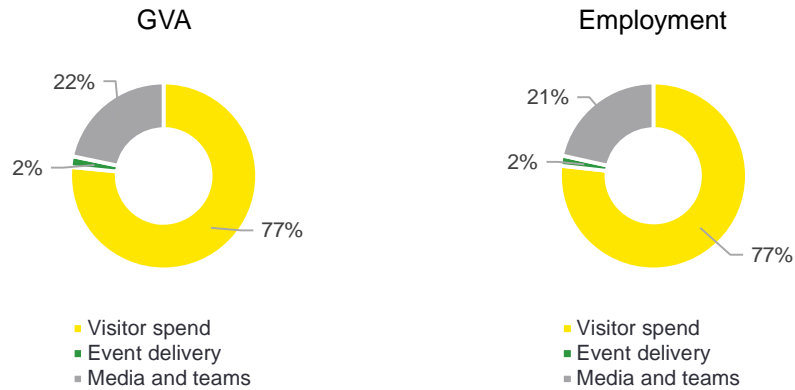
Source: EY analysis. Totals may not sum due to rounding.

For each location, the direct, indirect and induced impacts show the relative distribution of impacts generated directly by the event (i.e., the sectors that receive the first round of spending from both a delivery and attendee perspective), the impacts indirectly supported on local supply chains and finally the impacts generated from direct and indirect employee spending (induced impacts). The indirect and induced impacts also show the strength of the multiplier effect from supplier and employee related spending.

The impact on the UK – in both GVA and employment terms – is highest because of the duration of stay in the UK as a whole by international spectators is higher than both Scotland and Glasgow. However, focusing on Scotland, the 2023 UCI Cycling Worlds generated £344m of incremental spend across direct, indirect and induced impacts, which resulted in £205m of additional value add to Scotland-based businesses and supported the equivalent of 5,285 full-time jobs. The majority of these impacts were direct – showing the benefits to the sectors (such as accommodation) that received the first round of spending from attendees and suppliers benefiting from delivery of the event.

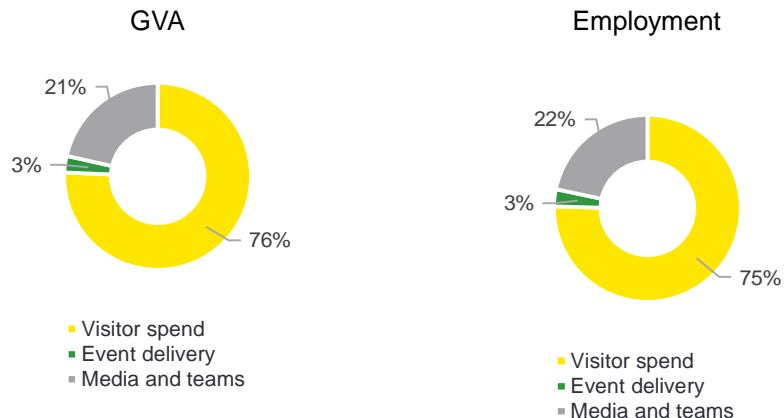
However, indirect and induced impacts were also substantial, comprising c.33% of the total GVA impact on Scotland and c.19% of the total employment impact. The variance in GVA and employment impacts reflects the varying labour productivities on the supply chain and in the sectors impacted by employee spending.

Figure 29: Breakdown of GVA and employment impacts in Scotland by spending type



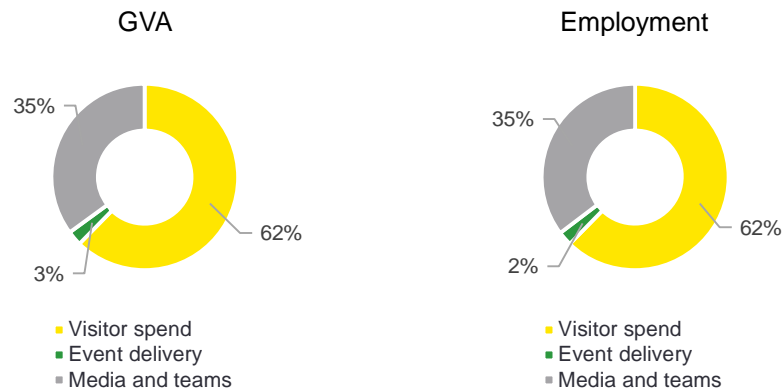
Source: EY analysis

Figure 30: Breakdown of GVA and employment impacts in Glasgow by spending type



Source: EY analysis

Figure 31: Breakdown of GVA and employment impacts in UK by spending type



Source: EY analysis

Figure 29, Figure 30 and Figure 31 show the GVA and employment impacts in Scotland, Glasgow and UK by spending type. A vast majority of the GVA and employment impacts in all three lenses are driven by spectator spend, followed by media and teams. Event delivery accounts for a small portion of the GVA and employment impacts, ranging between 2-3% in all cases. In comparison to a sample of 15 UCI events in EY's database of economic impact studies, spectator spend was a larger source of GVA at the 2023 UCI Cycling Worlds. In contrast, the share of media spend to GVA at the Championships was similar to other UCI events and share of event delivery was lower than the average of 8%. This is likely because the increased event delivery costs relative to a single championship event is likely to be disproportionately less than the increase in spectator impacts. These trends are also seen in employment impacts.

Furthermore, the GVA per spectator in Scotland for 2023 UCI Cycling Worlds is an estimated £224. The comparable average GVA per spectator from a sample of 15 European hosted UCI events was an estimated £156. This implies the Championships generated an approximately 44% higher economic footprint per spectator than previous events²⁷, indicating the event was successful in generating a significant economic contribution.

²⁷ The varying scale of events in different locations means these figures are not a like-for-like comparison. These comparisons are to provide additional context only.

5. Sustainability

Delivering an event of the scale of the 2023 UCI Cycling Worlds inevitably drives environmental impacts. To try and mitigate these, sustainability was a core objective in delivering an innovative, world-class event providing a model for the future. A Sustainability Framework was put in place, outlining core values and guiding principles mapped against the pillars of People, Place and Planet in alignment with and to drive progress towards the United Nations Sustainable Development Goals. Several sustainability interventions were put in place to support Scotland's climate ambitions. These included signing the UN Sport for Climate Action Framework, enhancing climate change awareness and sustainability upskilling, encouraging the use of sustainable transport, waste being diverted from landfill, energy use from renewable sources, as well as sustainability standards being a core part of the procurement process.

A separate Sustainability Report is being produced by 2023 Cycling World Championships Ltd at the time of writing and is expected to be available in Spring 2024.

The Sustainability Report, prepared using data from the host, event delivery partners and other external sources, will include information on sustainability, such as:

1. Sustainable travel;
2. Carbon footprint of the Championships;
3. Waste produced at the Championships;
4. Energy consumption;
5. Local environments and biodiversity; and
6. Cycling participation.

Below we have provided some findings from the primary research carried out for the study:

1. 86% of stakeholders, including those from government, sporting bodies, and environmental bodies, felt the 2023 UCI Cycling Worlds were delivered in an environmentally responsible way.
2. Active travel (i.e., walking, running or cycling) was highly encouraged during the Championships as a method of sustainable travel. 82% of respondents used a form of active travel during the 2023 UCI Cycling Worlds and over half of respondents stated they were likely to increase their use of active travel.
3. As a global event, carbon-intensive methods of travel were unavoidable. However, 35% of competing teams have used or intend to use a means of offsetting their carbon footprint in relation to their travel to the Championships.

While the Sustainability Report will provide further detail, these findings give early indication that the sustainability interventions put in place in delivering the Championships had a positive impact

6. Concluding remarks

In conclusion, considering the three focus areas of this evaluation of socioeconomic benefits of the 2023 UCI Cycling World Championships – social contribution, economic impact and sustainability – the event can be deemed to be very successful in delivering against each of these impact areas. Testament to this success is that:

- **Social:**
 - 95% of Scottish spectators felt proud to host the Championships.
 - 97% of attendees found the Championships inclusive.
 - Over £6m invested across all 32 local authorities to date.
 - 93% of teams felt this was a world-class event.

- **Economic:**
 - Around 200 million hours were watched live on television globally over 11 days of competition – this was 78% more hours watched than the combined average for a typical year of separate Championships between 2017 and 2022.
 - An estimated 338,000 attendees travelled from outside of Scotland, with 249,000 having travelled from elsewhere in the UK and 89,000 having travelled from outside the UK.
 - The 2023 UCI Cycling Worlds generated £344m of incremental spend across direct, indirect and induced impacts, which resulted in £205m of additional value add to Scotland-based businesses and supported the equivalent of 5,285 full-time jobs.

- **Sustainability:**
 - 35% of competing teams have used or intend to use a means of offsetting their carbon footprint in relation to their travel to the Championships.
 - 82% of visitors used a form of active travel during the 2023 UCI Cycling Worlds.
 - 86% of stakeholders, including those from government, sporting bodies, and environmental bodies, felt the 2023 UCI Cycling Worlds were delivered in an environmentally responsible way.

7. Appendix

7.1 Methodology

7.1.1 Economic impact methodology

The economic impacts associated with the Championships are broadly broken down into three categories:

1. Event delivery – supported by the operations of organising the Championships.
2. Spectator spending – supported by the expenditure of spectators on travelling to attend the event, and spending money on food, beverages, merchandise and accommodation.
3. Media and Teams – supported by the expenditure of media personnel and competing nations and individual entrants on attending the Championships, both professionally and personally.

Within each of these sub-categories, direct, indirect and induced impacts have been estimated.

Direct economic impacts

The spending impacts in Glasgow, elsewhere in Scotland, and elsewhere in the UK are based on the data collected during the primary research.

Gross direct impacts

The total expenditure that takes place as a result of the 2023 UCI Cycling Worlds indicates the gross direct output impact. This is then adjusted for additionality²⁸ to arrive at a net direct output impact, as described below.

Net direct impacts

For spectators, media and teams, gross direct impacts are adjusted for additionality to arrive at net direct impacts: only the spending of residents outside the Glasgow city region is included in the impact estimate for Glasgow. Similarly, only the spending of residents from outside Scotland is included in the impact estimate for Scotland, and only residents from outside the UK is included in the impact estimate for the UK.

Once the spending impacts 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.

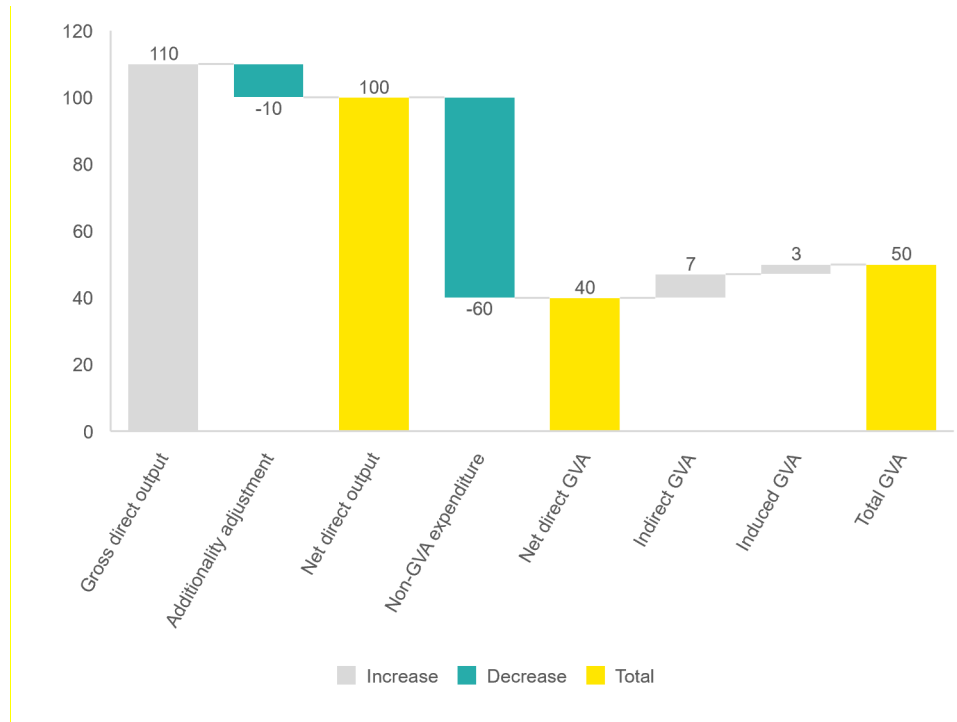
These effects show the total impact on the region's economy for each £1 output in the sector. These were calculated based on the structure of the regional economy, after accounting for leakages such as imports from abroad and from elsewhere in the UK.

²⁸ Additionality adjustments seek to reduce economic impacts to capture only that activity that would not have taken place had the event not taken place. Adjusting for additionality entails removing expenditure by individuals that would have been present in the geographical area in any case, were it not for the event. This includes residents of the geographical area (e.g. Glasgow residents when evaluating the net economic impact on Glasgow), as well as those that have travelled to the area primarily for a reason other than to attend the event.

This follows the input-output framework pioneered by Wassily Leontief and is based on UK national accounts data collated by the Organisation for Economic Cooperation and Development.

Figure 32 provides an illustration of the steps taken to calculate total GVA.

Figure 32: Illustrative calculation of total GVA impacts



Source: EY analysis

Further considerations

The approach taken to economic impact measurement is effective in understanding the key drivers behind the economic impact of the Championships, and in isolating impacts that occur as a result of the 2023 UCI Cycling Worlds from those which may well have occurred regardless.

There are a number of further considerations relevant to our approach that should be noted, 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. This has not been quantified as part of this study.
- **Additionality:** as far as possible, this study seeks to include only those economic impacts which are additional to Glasgow, Scotland and the UK. This is done by clearly setting out in the spectator survey if attending the Championships was the primary reason for their visit that day. If the corresponding answer was no, then that individual was discounted from the spend analysis as it is assumed they would have incurred that expenditure anyway. As a result, only the impacts of expenditure from outside Glasgow/Scotland/UK are included within the overall impacts (in order to exclude 'deadweight' expenditure that would have occurred regardless of hosting the Championships from calculations).²⁹ To the extent that

²⁹ eventIMPACTS economic toolkit

events actively discourage visitors to Glasgow/Scotland/UK, this may reduce the impacts from those stated within this report. However, these impacts are likely to be minimal.

7.1.2 Social impact methodology

Social contribution has been measured by data gathered through primary and secondary research. The primary research methodology is set out in Section 7.3, and secondary research in Section 7.4.

7.1.3 Sustainability impact methodology

The sustainability impact will be measured by data gathered through primary and secondary research. This is explained in full in Sections 7.3 and 7.4.

7.2 Detailed economic impact results

The full set of economic impact results are as follows:

Table 8: Detailed economic impact results

		Scotland	Glasgow	UK
Gross output	Gross output ³⁰ (£m)	344	216	426
Direct	Employment	4,307	2,702	3,255
	GVA (£m)	138	87	81
	Output (£m)	225	141	159
Indirect	Employment	494	290	1,509
	GVA (£m)	31	15	51
	Output (£m)	60	38	112
Induced	Employment	484	159	1,114
	GVA (£m)	36	27	82
	Output (£m)	59	37	154

Source: EY analysis

7.3 Primary Research

Extensive primary research was conducted to build up an understanding of the economic activity supported by each Championship event, including the spending pattern of spectators and the activities undertaken during their stay. This involved conducting survey interviews of five groups of people during the course of the Championships:

1. Spectators
2. Teams
3. Individual entrants
4. Media
5. Stakeholders

³⁰ Gross output is analogous to the total revenue generated by an economic activity. GVA shows the value added by the activity after deducting intermediate costs (i.e., the costs used up in the production process) and is the preferred measure of reporting economic impacts.

There was a very large number of respondents, giving us a significant sample size. These are set out in Table 9.

Table 9: Summary of survey approaches

	Spectators	Teams	Individual entrants	Media	Stakeholders
Number of respondents	8,886	56	448	67	21
Selection approach	Face-to-face and online survey	Online survey issued to all	Online survey issued to all	Online survey issued to all	Video call interview or questionnaire via email
Total population	913,881	129 national teams plus 3 additional competing groups	1,980	637	45

Source: EY analysis

7.3.1 Spectators

Questions posed to spectators were dependent on where respondents are from, and where they had visited. This is illustrated in Table 10. The 'spectator type' indicates where respondents are from (Glasgow, Elsewhere in Scotland, Elsewhere in the UK, International) and whether they spent any time in Glasgow during the Championships (Yes or No).

Table 10: Spectator survey questions by spectator type

Questions covered by the survey	Spectator type						
	Glasgow	Elsewhere Scotland Yes	Elsewhere Scotland No	Elsewhere UK Yes	Elsewhere UK No	International Yes	International No
Demographics (including age, gender, ethnicity, etc.)	✓	✓	✓	✓	✓	✓	✓
Reason for visit	✗	✓	✗	✓	✓	✓	✓
Length of stay Scotland	✗	✗	✗	✓	✓	✓	✓
Length of stay Glasgow	✗	✓	✗	✓	✗	✓	✗
Spending patterns by category Scotland	✗	✗	✗	✓	✓	✓	✓
Spending patterns by category Glasgow	✗	✓	✗	✓	✗	✓	✗
Likelihood to return to Scotland in future and recommend to friends as a holiday destination	✗	✗	✗	✓	✓	✓	✓

Questions covered by the survey	Spectator type						
	Glasgow	Elsewhere Scotland Yes	Elsewhere Scotland No	Elsewhere UK Yes	Elsewhere UK No	International Yes	International No
Sustainability: Primary travel method (overall and on the day)/active travel use/offsetting	✓	✓	✓	✓	✓	✓	✓
Whether the respondent is an existing fan of cycling	✓	✓	✓	✓	✓	✓	✓
Whether the Championships have increased awareness of Scotland's cycling facilities	✓	✓	✓	✗	✗	✗	✗
Whether the respondent has been inspired to do more exercise, specifically cycling	✓	✓	✓	✗	✗	✗	✗
Perception of the Championships	✓	✓	✓	✓	✓	✓	✓

7.3.2 Teams

An online survey was sent to the representatives of the National Federations competing at the Championships. The questions covered:

1. Nation and number of people in the team
2. How many nights the team spent in Glasgow, elsewhere in Scotland, and elsewhere in the UK, including any additional nights before or after the Championships
3. How much the team spent in Glasgow, elsewhere in Scotland, and elsewhere in the UK. The spend categories include:
 - Accommodation
 - Food and drink
 - Transport
 - Tourism activities
 - Event merchandise
 - Other
4. Estimate of the additional personal spend of race team members while in Glasgow, elsewhere in Scotland and elsewhere in the UK
5. To what extent the team thought the 2023 UCI Cycling Worlds were a world-class event

6. Whether the team was satisfied with the 2023 UCI Cycling Worlds
7. The main benefits and challenges the team faced from the Championships combining 13 events into one
8. Whether the team had used, or planned to use, any means of offsetting their carbon footprint in relation to travel to the Championships

7.3.3 Individual entrants

An online survey was sent to the participants of individual entrant events (i.e., Gran Fondo and BMX Challenge). The questions covered included:

1. Where the respondent currently lives (Glasgow, elsewhere in Scotland, elsewhere in the UK, or outside the UK)
2. How many nights they spent in Glasgow, elsewhere in Scotland and elsewhere in the UK; including additional nights before or after the Championships
3. How much the respondent spent in Glasgow, elsewhere in Scotland, and elsewhere in the UK. The spend categories include:
 - o Accommodation
 - o Food and drink
 - o Transport
 - o Tourism activities
 - o Event merchandise
 - o Other
4. Number of people spend amounts cover
5. Whether the respondent is likely to return to Scotland in the future for a holiday, or recommend Scotland as a holiday destination
6. The primary method of travel taken to get to the Championships
7. Whether the Championships has increased the respondent's awareness of Scotland's cycling facilities
8. Whether the respondent felt proud that the Championships took place in Scotland (applicable for Scottish respondents only)
9. How satisfied the respondent was with the 2023 UCI Cycling Worlds
10. Questions to understand the demographic profile of the respondent, including gender, ethnicity and if the respondent has any long-standing physical or mental impairments, illness or disability, expected to last 12 months or more

7.3.4 Media personnel

An online survey was sent to all media personnel who attended the Championships. The questions covered included:

1. Where the respondent currently lives (Glasgow, elsewhere in Scotland, elsewhere in the UK, or outside the UK)

2. How many nights they spent in Glasgow, elsewhere in Scotland and elsewhere in the UK; including additional nights before or after the Championships
3. How much the respondent spent in Glasgow, elsewhere in Scotland, and elsewhere in the UK. The spend categories include:
 - o Accommodation
 - o Food and drink
 - o Transport
 - o Tourism activities
 - o Event merchandise
 - o Other
4. Number of people the spend amounts cover
5. How many features/articles the respondent will be producing

7.3.5 Stakeholders

The data gathered from stakeholders is summarised in Table 11.

Table 11: Stakeholder questions by stakeholder type

Questions covered during conversation or within questionnaire	Stakeholder type							
	Government	Sporting body	Environmental body	Business and enterprise body	Travel body	Tourism body	Businesses	Community groups
What, if any, were your aims for the Championships? To what extent were those achieved?	✓	✓	✓	✓	✓	✓	✓	✓
Are there any activities or practises that you have started as a result of the Championships that you intend to continue beyond the Championships?	✓	✓	✓	✓	✓	✓	✓	✓
One of the visions of the Championships relates to achieving policy outcomes through to 2027. As a result of the Championships, have you made any new or enhanced policy or investment commitments to cycling?	✓	✓	✓	✓	✓	✓	✗	✗
To what extent did the Championships help, or hinder,	✗	✗	✗	✗	✗	✗	✓	✓

	Stakeholder type							
Questions covered during conversation or within questionnaire	Government	Sporting body	Environmental body	Business and enterprise body	Travel body	Tourism body	Businesses	Community groups
your usual course of business?								
Have the Championships helped to increase cycling and other active travel in Scotland?	✓	✓	✓	✗	✓	✗	✗	✗
Have the Championships helped to improve awareness and perceptions of cycling in Scotland?	✓	✓	✓	✗	✗	✗	✗	✓
Have the Championships helped to increase the uptake of sport more generally in Scotland?	✓	✓	✗	✗	✗	✗	✗	✓
To what extent do you believe that the Championships will provide a long-term boost to tourism in Scotland?	✓	✗	✗	✗	✗	✓	✗	✗
To what extent do you believe that the Championships has benefitted business and commerce in Scotland?	✓	✗	✗	✓	✗	✗	✓	✗
To what extent do you believe that the Championships was delivered in an environmentally responsible way?	✓	✓	✓	✗	✗	✗	✗	✗
To what extent do you feel that the Championships have been a convening force within cycling? E.g., supporting a more joined-up approach across tourism, travel, sport etc.	✓	✓	✗	✗	✓	✓	✗	✗
A National Policy Advisory Group has been created for the Championships. Do you feel that this - or a similar forum - should	✓	✓	✓	✓	✓	✓	✓	✓

Questions covered during conversation or within questionnaire	Stakeholder type							
	Government	Sporting body	Environmental body	Business and enterprise body	Travel body	Tourism body	Businesses	Community groups
continue after the Championships, and if so, what would you like to see this group achieve?								
To what extent do you feel that the Championships will have positive long-term, policy impacts?	✓	✓	✓	✓	✓	✓	✓	✓
If Scotland were to host a similar event in the future, what would you like to see delivered differently?	✓	✓	✓	✓	✓	✓	✓	✓
Overall, do you see the Championships as a success?	✓	✓	✓	✓	✓	✓	✓	✓

7.4 Secondary Research

The output reports of several other delivery partners have also formed inputs into this evaluation report. These reports and partners are set out in Table 12.

Table 12: Delivery partner reports

Report	Produced by	Dependency
EDI Report	Mor Diversity, commissioned by 2023 Cycling World Championships Ltd,	Provision of key EDI statistics
Sustainability Report	2023 Cycling World Championships Ltd.	Provision of key environmental metrics
Volunteer Report	Glasgow Life	Outline of benefits delivered to volunteers
Ride the Worlds Report	Scottish Cycling	Activations case study
Commercial Highlights Report	2023 Cycling World Championships Ltd.	Operational expenditure data used as an input in the economic impact modelling Sales data used as an input in the economic impact modelling
Procurement Report	2023 Cycling World Championships Ltd.	Geographic location of operational expenditure data as an input in the economic impact modelling
Digital Report	2023 Cycling World Championships Ltd. and UCI	Digital engagement statistics
TV Monitoring Report	Nielsen, commissioned by UCI	Broadcast statistics

7.5 Summary of social impact metrics

Table 13 below shows a summary of social impact metrics under each of the five areas.

Table 13: Social impact metrics

Outcome area	Impact metrics	Results
Equality, Diversity and Inclusion	<ul style="list-style-type: none"> Demographic diversity of participants (e.g., with regards to gender, age, ethnicity, socio-economic status, disability) Demographic diversity of attendees, employees and volunteers Positive sentiment of the Championships by new audiences 	<ul style="list-style-type: none"> 40% of spectators were female 10% of volunteers came from the most deprived areas of Scotland 97% of attendees found the Championships inclusive 93% of attendees who had long-standing physical or mental impairments, illness or disability felt the Championships were accessible 94% of new audiences were satisfied or very satisfied with the Championships
Health and wellbeing	<ul style="list-style-type: none"> Use of active travel to events during the Championships Increase in awareness of Scotland's cycling facilities Percentage of residents feeling inspired to do more sport or physical activity 	<ul style="list-style-type: none"> 82% of spectators used active travel during the Championships 52% of spectators are likely or very likely to increase their use of active travel as a result of the 2023 Championships 91% of spectators said the Championships improved their awareness of Scotland's cycling facilities 79% of Scottish spectators felt inspired to cycle more
Sport Excellence	<ul style="list-style-type: none"> Athlete rating of the Championships for fairness Disciplines run according to UCI Organisation Guide Satisfaction levels with sport competition 	<ul style="list-style-type: none"> 93% of teams felt this was a world-class event All disciplines run according to UCI Organisation Guide 79% satisfaction among individual entrants (satisfied and very satisfied) and 89% among competing nations
Community	<ul style="list-style-type: none"> Education and training of employees and volunteers Investment in venues, equipment and infrastructure Feelings of civic pride in the community 	<ul style="list-style-type: none"> 27% of volunteers wanted to be involved to gain new skills / for personal development 11,176 hours of training completed by volunteers At time of writing (January 2024), over £6m invested across all 32 local authorities in Scotland³¹ 95% of Scottish spectators felt proud to host the Championships 60% of spectators said the Championships somewhat, significantly, or very significantly helped them to develop their social network
Lasting impacts	<ul style="list-style-type: none"> Stakeholder activities that will continue beyond the Championships Promoting Scotland as a tourist destination 	<ul style="list-style-type: none"> 93% of stakeholders intend to continue activities that they started in relation to the Championships 86% of spectators are likely or very likely to return to Scotland in the future for a holiday

³¹ To help deliver lasting impacts and benefits for communities from the 2023 UCI Cycling Worlds, additional investments were made available. Amongst others, this included the £8m Cycling Facilities Fund and the £1m Community Cycling Fund supporting sustainable cycling projects and events.

Outcome area	Impact metrics	Results
		<ul style="list-style-type: none"> 91% of spectators are likely to recommend Scotland as a holiday destination to friends, family and colleagues

Source: EY analysis

7.6 Sample of UCI comparison events

Table 14 below shows the list of UCI events used for comparison with the 2023 UCI Cycling Worlds.

Table 14: UCI sample events

Year	Host City	Championship Event
2017	Bergen	Road
2018	Innsbruck	Road
2018	Varese	Gran Fondo
2018	Lenzeheide	Mountain Bike
2018	Apeldoorn	Track
2019	Pruszkow	Track
2019	Bogense	Cyclo-cross
2019	Zolder	BMX
2019	Val di Sole	Mountain Bike
2019	Yorkshire	Road
2020	Dubendorf	Cyclo-cross
2020	Berlin	Track
2021	Val di Sole	Mountain Bike
2021	Flanders	Road
2022	SQY	Track

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