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Welcome to the second edition of the Global Sports Impact (GSI) Report 2016, our annual review of the impact of sport over the last 18 months.

In 2015 the Global Sports Impact Project focused on the development of the GSI Event Studies Programme and the second phase of the GSI Experts programme.

Event hosting in 2015 in some ways mirrored event hosting in 2014, with Europe being the dominant host continent. However, the proportion of events it hosted was significantly reduced, while North America and Oceania significantly increased their proportions.

Thirty-eight nations hosted the 83 events studied in 2015 in 119 cities. The GSI Report 2016 identifies and analyses the top host cities and nations in 2015.

One impact that wasn’t explored in much detail in the first edition of the GSI Report was the area of governance. But it was sports’ off-field activities that grabbed the world’s attention in 2015 and 2016.

The social impact of sport is of increasing concern and importance to host cities and governments. In a recent survey of major international sports destinations Sportcal found that it is also increasingly important to hosts.

But very few sports governing bodies measure the social impact of their events. There is little or no agreement on what the standard measure of social impact should be and while educational programmes support many events or some forms of social engagement, very few of these are recorded and measured.

Volunteering is probably the only measure that is reasonably well recorded by event owners, and even then the true figure is often not accurately recorded.

2016 represents the culmination of another Olympic cycle with the Olympic Games in Rio de Janeiro.

But what legacy did the last Olympic cycle provide for London and Sochi, the hosts of the summer and winter Olympic Games in 2012 and 2014, respectively?

Our industry experts explore some of the key legacy impacts of these two Olympic Games and what we are likely to see from the Olympic Games in Rio in 2016.

The final chapter of the report, Event Analysis, presents up to 39 data analysis points on each of the major events of 2015, analysing the relative impacts that are created by each event.

For 2015 the GSI Report was the area of governance.

But it was sports’ off-field activities that grabbed the world’s attention in 2015 and which were the most prominent.

Over 70,000 athletes participated in the 83 major events in 2015. 59.4% were male and 40.6% were female. The Sporting Impact section explores where these athletes were from, what percentage of member nations were represented in these events, which events were the most gender-equal and what sport needs to do to promote gender equality better. Our industry experts look at the growth of women’s sport, the progress it made in 2015 and what steps federations took to try and engage in the IOC’s Agenda 2020 reform programme and make their sports more gender-equal.

Cumulative audience has been a popular measure to express media coverage over the last decade or so, but very few people really believe these figures, as apparently ridiculous claims about the number of people who have watched a sporting event are made. In fact, the cumulative figure has become so unreliable that the GSI Project has decided not to use it as a means of showing the media impact of sport. In this year’s report we explore, through our industry experts, some of the alternative ways in which we can express media impact.

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The Global Sports Impact (GSI) Project

What is the GSI Project?

We believe that sport is undervalued and that the true impact of sport is not fully understood and thus rarely captured.

How much do we really understand about the impact that sport has on our daily lives and how do we measure and quantify these impacts? Only through a comprehensive understanding of the actual impact can we truly appreciate the real value of sport and the benefits it brings to host cities and nations.

There is currently no internationally recognised method of analysing the benefits of sport, and in particular the benefits of hosting major sporting events. Every sport federation, event organiser or government agency uses its own different methodology. Few of these methodologies are comprehensive in nature and they frequently miss the true, holistic impact of sport.

There is no commonly accepted international standard that allows the analysis and comparison of major sporting events.

The GSI Project has three principal goals:

• To create some standard ways in which these impacts can be identified, measured and analysed, so providing to sport, and all its stakeholders, a new, comprehensive and objective picture of the full potential of sports events.

• To build a community to exchange knowledge and insights and to create a unique forum to promote discussion around the positive and negative impacts of sport.

• To provide a suite of products that can help stakeholders capture, analyse and present the true impact of their events using the standard methodologies and frameworks that have been created by the GSI Project.

The GSI Project was started in November 2011 with the support of UK Sport and Singapore Sports Council and a group of over 200 experts from around the world, representing many different sectors including:

• Academics
• Architects
• Cities
• Consultants
• Federations and Associations
• Tourism Agencies
• Event Agencies
• National Olympic Committees

These experts and stakeholders helped develop the first phase of the GSI Project which produced the first implementation of the GSI methodologies and ratings system and guided the creation of a suite of products to help stakeholders capture the true impact of sports events.

The second phase of the GSI Project was started in January 2015 and focused on three aspects:

1. The development of the GSI Events Studies programme
2. The second phase of the GSI Experts Programme
3. The publication of the first Global Sports Impact Report

The development of the GSI Events Studies Programme focused on working with a group of international federations that had either hosted international events in 2014, and wanted a post-event report, or that were hosting events in 2015.

Four international federations participated in the GSI Event Studies programme in 2015:

• International Hockey Federation (FIH)
• World Archery Federation (WA)
• World Taekwondo Federation (WTF)
• World Air Sports Federation (FAI)

The second phase of the GSI Experts Programme was organised by the University of Victoria in Australia which engaged over 200 industry experts in a series of Delphi studies, a systematic, interactive forecasting method, to understand in more detail what are the key pillars, drivers and indicators that formulate the GSI model.

Experts were allocated to groups according to their particular knowledge, experience and interest. They completed an online survey, which asked a series of questions.

These surveys aimed to answer two key questions:

1. What are the main elements of impact – the clusters or the pillars – to be considered when measuring the impact of sports events; and what are the key indicators that should be used to measure the impacts against these elements?

2. What is the relative importance of these elements and how does that relativity change according to the varying scale and types of event? Should, for example, a mega event be assessed differently from a world championship, or should a ticketed event be measured differently from a non-ticketed event?

The responses and results were analysed and a more enhanced prototype model was created for scoring and rating events; this will enhance the development of the GSI Events Rating system.

It was clear from the responses that the development effort should focus around the top five or six pillars that emerged – Economic; Media; Sporting; Social; Brand; Environment.

Event Hosting and Bidding

Event Hosting

Thirty-eight nations hosted the 83 events studied by the GSI Report in 2015, across 119 cities.

Event hosting in 2015 in some ways mirrored event hosting in 2014, with Europe being the dominant host continent. However, the proportion of events it hosted was significantly reduced, while North America and Oceania increased their percentages quite considerably.

The year before an Olympic Games is always a big year for world championships as many of the events are used as qualifying events for the Olympic Games and thus are better attended than non-Olympic qualifying events.

If we look at the example of attendance at the World Archery Championships, a biennial event, there is a clear spike in athlete and nation attendance in the years in which it precedes the summer Olympics.

This means a bonus for host cities that are hosting Olympic qualifying events, as they will attract more participants and consequently more media coverage and more exposure.

This factor is important in assessing the value of an event, as identified by the GSI Events Study conducted on the World Archery Championships in Copenhagen, Denmark. The study found that the participants in the championships generated around $3 million before a single ticket was sold for the event.

For host cities looking to attract major sporting events this provides a valuable source of revenue and makes the smaller world championship events more attractive from an economic and tourism perspective, particularly in the pre-Olympic year.

In 2015 much controversy centred around bidding for major events, and in particular around the major sporting events.

Three cities pulled out of bidding for the winter Olympic Games (Stockholm, Sweden; Krakow, Poland; and Oslo, Norway) because of unfavourable public referenda that were seen as a backlash against a widely-reported public expenditure overrun at the 2014 winter Olympic Games in Sochi.

The Sochi games cost a reported $51 billion, making them the most expensive Olympic Games project ever, albeit organisers insisted that the figure (which they disputed) included the infrastructure costs of creating a new winter sports resort that would continue to serve the region and country for decades to come. Nevertheless, the figure tagged the winter Olympics as a highly unattractive use of public money.

The consequence of these withdrawals was that only two contenders were left in the race for the winter Olympics in 2022, the eventual winner Beijing in China, and Almaty in Kazakhstan. Almaty and Kazakhstan experienced a serious financial crisis after the event was awarded, resulting in some bid suppliers not being paid for their services.

Without explaining the wider benefits of hosting the winter Olympics, it is hard to see how the IOC will attract more cities to bid for the games in future.

Indeed, the situation might not be all that different for the race to host the (summer) Olympic Games in 2024. With the election of a new mayor of Rome in June 2016, the likelihood of Rome dropping out of the race appeared to increase. If this were to happen then just three potential bid cities would be left: Budapest, Los Angeles and Paris.

As the Global Sports Nations Index shows, Russia has been very active in bidding for and hosting major sporting events in the last few years. Russia, however, faced with doping scandals and funding issues, has said that it is stepping back from hosting major sporting events. This, along with other countries reviewing their bidding budgets, has resulted in many federations re-evaluating their bidding procedures and attempting to make their bid processes more transparent and informed.
Governance of Sport

Sport hit the headlines in 2015, not so much for what happened on the field but for what happened off it. Never has the governance of sport been so much in the spotlight, and never have so many questions been asked of sport’s leadership.

Two of the largest sports in the world, soccer and athletics, were faced with unprecedented scrutiny as national authorities and investigative journalists uncovered layers of corruption within their organisations.

In Fifa’s case the problems directly related to members of the executive committee of soccer’s world governing body and to allegations that they had illicitly profited from media rights deals, mainly in South America.

In athletics the problems centred around the discovery of systemic state-supported doping in Russia, leading to the suspension of ARAF, the Russian athletics federation. To add to the problems, it was alleged that Lamine Diack, the former president of the IAAF, and his son, Papa Massata Diack, were involved in the extortion of money from athletes who had failed drugs tests. This set a new bar in the corruption allegations against the governing bodies of sport, implying that they had knowingly allowed drug cheats to participate in major championships and win medals, ultimately affecting the outcome of results in their sport.

But governance issues affected not only soccer and athletics. SportAccord, the organisation set up to represent all international sports federations threatened to implode after its erstwhile president Marius Vizer launched a damning attack on the IOC and its president, Thomas Bach.

Meanwhile, an increase in cases of match-fixing threatened the integrity of a variety of sports, led by soccer and tennis.

What is “good governance”? How do we compare the governance of a variety of organisations, from national to international, small to large. How should we create an index to compare Fifa with a federation like the World Flying Disc Federation; and do we need to?

How can sport govern itself and at the same time maintain its credibility, given the corruption that has been witnessed in 2015 and 2016? Abuse of power is clearly prevalent in sport but just how bad is it? Soccer and athletics have been in the spotlight, but as the net widens how many other sports lack a transparent governance model?

We asked some of the leading experts in the area of sports governance what sport needs to do to regain its global credibility, and how it should address some of these fundamental issues so that sport can continue to be self-regulating.

FIFA

Infantino aiming to lead reformed FIFA into less turbulent era

Fifa earmarked 2016 as a year of renewal after a scandal-plagued 12 months in which various senior executives were banned and/or subjected to criminal investigation, further tarnishing the reputation of soccer’s international governing body, and impacting on the bottom line.

The federation now has a new president, in Gianni Infantino, who has pledged to restore its image and standing, but he faces a tough task to right the wrongs of the previous administration, and has already come in for criticism over his handling of the reform process that coincided with his accession and now faces his own investigation by the Fifa ethics committee.

The tone for 2015 was set in May when, on the eve of the Fifa Congress in Zurich, seven senior figures were arrested at a hotel in the Swiss city after being indicted, together with various other officials and corporate executives, in a US Department of Justice investigation into corruption in soccer in the Americas.

At the same time, the Swiss Office of the Attorney General launched an investigation into the controversial bidding process for the 2018 and 2022 World Cups, which were awarded to Russia and Qatar respectively.

These developments cast a cloud over Sepp Blatter’s re-election for a fifth term as Fifa president, and within days the veteran Swiss official had announced his intention to step down once new reforms were enacted.

Events were taken out of Blatter’s hands, and the crisis at Fifa deepened, when, in September, he was provisionally suspended together with Uefa president Michel Platini over a contentious SFr2-million ($2.05-million) transaction between the pair in 2011.

The pair were subsequently banned from all soccer for eight years, and the bans have been upheld, albeit reduced, in appeals since.

Infantino succeeded the disgraced Blatter in February 2016 on the same day that the Fifa Congress passed a package of reforms intended to prevent a repeat of the scandals of recent years, and there are hopes that the change of leadership and statutes will revive public faith in Fifa and attract potential new commercial partners that may have been deterred by the recent scandals.

However, the low esteem in which the federation has come to be held and the clashes Infantino has already had with other Fifa officials in his early days in office suggest it will not be an easy road to redemption.

Infantino has since faced his own investigation by the Fifa ethics committees and it is clear that Fifa’s governance issues are far from over.
Economic Impact

Economic Impact is the most common methodology adopted by a wide range of stakeholders looking to quantify the impact of major sporting events. In most countries where governments financially support the hosting of major sporting events some form of economic impact model has been developed to justify and measure the investment made in sport.

These models vary in character but are largely developed around the estimated number of spectators visiting an event from outside the local region, and the amount those visitors spend on travel, accommodation, food and entertainment.

What has become clear from the analysis undertaken through the Global Sports Impact project is that there is no overall consensus on what this economic impact model should contain and how the data is obtained. There are general rules of thumb but an impact figure gathered in, for example, the Netherlands can vary significantly from a figure gathered in, say, Canada.

Similarly, figures produced by one consultancy on a major event in one country may vary significantly from a study undertaken by a different consultancy on a different event in a different country.

The job of understanding the global impact of sport becomes very difficult if figures from one event cannot be compared with those from another event. Even within a single country there can be significant variations in the estimated economic impact of a sporting event from different organisations.

In the first of our fact files, on Rugby World Cup 2015 hosted in England, the tournament was found to have generated an economic impact of over $3.6 billion (£2.3 billion) in a report published by professional services company EY in May 2016, making it the most successful Rugby World Cup ever in economic terms.

The EY study showed that the 2015 world cup attracted 406,000 international visitors from 151 countries, staying for an average of 14 days and spending a total of $1.5 billion (958 million), or an average of $3,740 (£2,400) per person, while the tournament supported 34,000 jobs or volunteer roles across the UK.

According to the report, foreign visitors spent $420.4 million (£270 million) on accommodation, $362.8 million (£233 million) on leisure activities, $292.7 million (£188 million) on food and drink, $242.9 million (£156 million) on travel and $172.8 million (£111 million) on retail.

Within the UK, the organisation responsible for attracting major sporting events, UK Sport, has developed its own methodology for measuring the impact of sporting events. This methodology, called EventImpact, has been developed in partnership with several key event groups within the UK to provide a standard model that all event organisers can use.

The model is freely available online and, with the key data to hand, it is possible to use the resource to calculate an economic impact figure for an event.

The economic impact element of EventImpact is based largely around attendance and offers three levels of assessment: basic, intermediate and advanced. Using the online calculator and some of the estimated figures from the EY report, it produces a vastly different calculation from the EY report.

Using the same number of spectators, 2,477,805, an average length of stay of 14 days and a daily spend on accommodation of $74 (48£) and $192 (£123) on other items, the calculator produces a figure of just $1.1 billion (£686 million) of Direct Economic Impact. This figure also includes spend by participants, or ‘attendees’ as UK Sport refers to them, which include competitors, officials, volunteers, media, organisers, etc.

This figure represents two-thirds of the figure EY calculates for visitor spend and a mere 30% of the overall figure quoted by EY of $3.6 billion (£2.3 billion).

There is a simple explanation for the variation. The UK Sport figure aims to identify the direct, tangible impact of an event that can be related to the additional income generated by spectators and ‘attendees’ coming into the country and spending money. It does not aim to identify the intangible benefits nor any multiplier effects that EY is trying to show.

The UK Sport calculation is the more pragmatic figure and is the number that will be used by the government to justify its spend on hosting major sporting events in the UK. It is a more realistic and understandable one than that produced by EY. The EY figure is a big number produced to convey a big impact for the event and notably seems to ignore the cost of hosting the event, including the guarantee provided to World Rugby. It is a figure created in isolation with nothing to compare it to.

The difference between the UK Sport figure and the EY figure highlights one of the fundamental problems that sport faces today. There is no common currency, no standard model that we can use to create a reference point and say this figure compares to this figure and this is what an event is really worth.

Canada is another country that has developed its own economic impact model that is used to estimate the impact of each event and to ensure future government support of events in Canada. The most commonly used of all these models is the Canadian Sport Tourism Alliance’s Sports Tourism Economic Assessment Model (STEAM).

The CSTA model was used to produce an assessment of the Fifa Women’s World Cup 2015 in preference to using an external consultancy company, and the figure produced was a direct economic impact of $396.9 million (C$493.6 million) for the event with $200.3 million (C$249.1 million) of GDP and $78 million (C$97 million) of additional taxes.

The Fifa Women’s World Cup, which was hosted across six cities, attracted a record-breaking attendance of 1,353,506. Of these 174,000 visitors made an overnight visit while 84,000 made one or more day trips. Over 96,000 spectators came from USA, forming the largest contingent of overseas visitors.

Our third fact file shows that the ICC Cricket World Cup 2015 attracted over a million spectators and almost 600,000 unique visitors, of which 145,000 were from overseas, generating an economic impact of $854.8 million (A$1.1 billion).

What is interesting about this overall economic impact figure of $854.8 million is that it includes all types of expenditures, local, interstate and international, whereas many economic impact studies only focus on ‘out-of-town’ visitors. The figure for visitors’ expenditure (i.e. not including local expenditure) is $664.3 million (A$855 million), which could be a more realistic assessment of economic impact.

Our fourth fact file is the UCI Road World Cycling Championships 2015, which were estimated to have attracted over 645,000 spectators, albeit the fact that it was a non-ticketed event means that estimating the number of spectators is a very inexact science. According to the analysis conducted by CHMRU, a US-based data analysis company, 12% of these spectators were from overseas, 31% from other states and 13% from Virginia, but from outside the host city of Richmond. Forty-four per cent were local spectators.

The most commonly used of all these models is the Canadian Sport Tourism Alliance’s Sports Tourism Economic Assessment Model (STEAM).
Sports tourism is one of the fastest-growing sectors of sport, according to the World Tourism Organisation (UNWTO); but very little is known about this sector of the sports industry and there seems to be around the UNWTO’s figures.

Analysis by Sportcal through the GSI Event Studies programme, however, has shown that an estimated $3 billion of direct economic impact was generated by the 83 world championships and multisport games studied in 2015 through overseas tourism, a significant level of which was created before a single ticket was sold.

Based on research conducted by Sportcal, the 83 events generated over 1.7 million bed nights and $437 million of direct economic impact from the event participants and media alone.

Similarly, very little data is gathered by the governing bodies on the number of overseas visitors attending a world championships or multisport games. Of the studies where overseas visitors numbers were identified, numbers and proportions varied considerably. But what is clear from the analysis is that very few governing bodies are focused on attracting overseas visitors to their events.

Using the data gathered on spectator attendance at the 83 GSI events studied in 2015 and modelling on the examples available for that period of time, Sportcal has estimated that more than 13 million bed nights were created in 2015 by over 2 million overseas visitors, generating a direct economic impact of $2.6 billion for the host economies.

Combining these two figures together gives an estimated direct economic impact of over $3 billion and this is without a focus on attracting overseas tourists, this figure could be increased significantly.
The 2015 GSI Report raised the issue of audience reach or cumulative audience and its use by events in communicating their media exposure and value. As commented in the 2015 report this figure is often misleading and does not necessarily reflect the true media exposure of an event.

The EBU’s Media Intelligence Service is addressing some of the issues around the measurement of audience data and is encouraging its members and partners to adopt a more transparent and meaningful way of measuring media coverage.

**Media Impact**

The measuring of media impact has traditionally been focused on the volume of people watching a sporting event and expressed as a cumulative or volume figure. The bigger the audience figure, the more impactful the event.

The problem with the cumulative audience figure is that it has been growing and growing for many years now to a point that very few people really believe it, and no one really understands what it contains and what it really means. Cumulative can include live audiences, highlights viewers and even news coverage, all of which creates a very mixed message.

In the last 18 months we have seen events like the FINA World Championships in Kazan, Russia in August 2015 report a global audience of 6.8 billion for the event. What does this figure mean and how do we interpret it?

In this section of the GSI Report we explore exactly what all these media figures mean and the Media Intelligence Service of the European Broadcasting Union (EBU) explains how some of these figures are derived and what could potentially be used as a meaningful standard for the media industry instead of cumulative exposures.

Measuring media impact is not just a challenge around how the types of methodologies are used but also around what the data is for. The media exposure of sport will be very different to the media exposure of a host city or nation. Valuing media exposure using traditional calculations like AVE (Advertising Value Equivalent) may work for some stakeholders, but not all.

Different stakeholders require different methodologies and approaches, yet all require an international standard they can follow.

**Audience data: Understanding the basics, avoiding the pitfalls**

By the Media Intelligence Service of the European Broadcasting Union (EBU)

TV audience measurement is generally recognised as very robust and trustworthy. In each country there is usually one official source, which produces audited results that are used by all relevant stakeholders. These are also the figures that are used in the sports industry. However, when reported on a global level, sports audience data is sometimes aggregated in a way that can cause misinterpretations, which in turn may lead to the data being mistrusted. This, surely, is a worrying situation that can discredit sports audience communications in general.

As one of the main players in the sports rights business, the EBU is committed to acting responsibly in order to better understand and interpret the data. This short overview is meant to be used as a reference tool. Illustrated by simplified visual examples, it summarises the main characteristics of three standard audience metrics (average audience, reach and market share), explains the shortcomings of the commonly used “cumulative audience”, and proposes “hours viewed” as an alternative to assessing total viewing volume.

**Average audience** is the average number of viewers watching in any one minute.

In example 1:

- The average audience of programme A is 2
- The average audience of programme B is 3
- The average audience across programme A and programme B is 2.3

Average audience can be expressed in number of people or % of the population. In example 2, the average audience of the sports match is 10% (two out of 20 individuals).

When averaged, programmes should ideally be comparable in terms of scheduling (channel and time slot), in order to achieve relevant results.
The social media accounts of the top 65 sports governing bodies and events ranked by Sportcal's GSI Social Media Index have increased by almost 59% in the last 12 months. The index tracks the social media reach of sport, and of the organisations and events that made up the 2016 Index, there were more than 571 million followers and subscribers, compared with 360 million in 2015.

In terms of year-on-year follower growth, Instagram, the photo-sharing platform, achieved the biggest rise, up 200% to 62,031,224. Facebook remained the largest platform, with 365 million (365,387,271) page likes, but of the three main social media platforms, it recorded the smallest annual growth, a still impressive 43%. Twitter recorded 144.5 million (144,558,813) followers, to remain in second place in terms of both numbers and growth.

YouTube continued the upward trend with 44.1% growth to 20 million (20,249,656) subscribers in the same period of time. It should be noted that the 2016 GSI Social Media Index has expanded the number of organisations and events it analyses. This wider dataset helps to create a fuller picture of social media volume.

International and national sports organisations are increasingly using social media to communicate and grow fan engagement. Social media is primarily a communication tool for these organisations but as social media expands its reach and engagement, commercial opportunities are emerging.

Social media is enabling sports organisations to reach a wider, younger, fan base. Marketing strategies focus on growing a larger fan following in order to increase brand exposure and thus provide sponsors with increased visibility and engagement and generate stronger media interest.

<table>
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<th>Platform</th>
<th>2016</th>
<th>2015</th>
<th>GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>365,387,271</td>
<td>255,443,740</td>
<td>43.0%</td>
</tr>
<tr>
<td>Twitter</td>
<td>144,558,813</td>
<td>84,320,052</td>
<td>71.4%</td>
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<tr>
<td>Instagram</td>
<td>62,031,224</td>
<td>20,671,369</td>
<td>200.1%</td>
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<tr>
<td>Total</td>
<td>571,977,308</td>
<td>360,435,161</td>
<td>58.7%</td>
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</table>

Source: Sportcal Research
Sponsorship Impact

A turbulent year for sponsors

From unwelcome headlines that engulfed the governing bodies of major sports to events that broke commercial and viewership records, 2015 was a mixed year for sponsorship and sponsors in general.

Brands associated with troubled organisations, such as Fifa and the IAAF, chose different approaches to deal with the problem. Initially some stood by loyalty oblivious to the passionate ravings of fans and unwilling to jeopardise their sought-after positions as partners. However, public pressure, through social media and other mediums, ensured that sponsors and brands were forced to address the moral capital of their partners like never before.

The prevalence of corruption that came to light in 2015 could have had an adverse effect for sports sponsorship. Who wants to invest hundreds of millions of pounds into a sport only to be rewarded with a tainted property that fans and consumers no longer trust? After public outcry, sponsors have exerted pressure on their partners to enact reforms. Sponsors will also benefit from reforms aimed at rebuilding trust and creating a new era of openness with major world sport governing bodies.

While it can be debated how much influence major sponsors can exert on the upper echelons of sport governance, brands are not shying away from the unique and powerful platform sport sponsorships provide.

Following news of the doping and bribing scandal that emboldened the IAAF earlier this year, Nestle announced it was terminating its sponsorship of the beleaguered federation with immediate effect. While this move was derided by IAAF President Lord Coe, it was indicative of sponsors wanting to protect their own brand image. Adidas made similar rumblings and made it clear that it was tracking the progress of the IAAF in dealing with the scandal before making a final judgement.

To date, adidas remains a sponsor of the federation.

Fifa faced a much more difficult struggle with retaining its roster of sponsors once news of its own corruption scandal broke. Second tier partners such as Continental and Johnson & Johnson allowed their contracts to expire, claiming that the scandal had no impact on decision-making. However, top tier sponsors Emirates and Sony, who provide Fifa with millions in funding every year, announced they would be terminating their sponsorship due directly to the negative publicity.

Despite some turbulence in 2015, sport sponsorship continues to make headway and is becoming an increasingly integral part of many marketing strategies. But how do brands ensure their sponsorships are successful? For some, sponsorship remains a simple branding exercise. However, for brands who want to make the most of their position, having an impact through activation is paramount in order to create a lasting and strong connection with the property in question and fans in general.

In 2015 there were two events that set new benchmarks for their respective sports: the Fifa Women’s World Cup hosted in Canada and the Rugby World Cup in England.

But how did sponsors pursue their activation strategies to maximise the potential of their relationships? What can be learnt from different strategies? What did sponsors do to integrate themselves with the events and is there a clear demarcation between activation for male events and female events?

The tournament was attended by the most fans ever for a Fifa event outside of the Men’s World Cup (1.35 million).

It was viewed by the largest audience ever for a Women’s World Cup and generated record TV audiences in England, Japan and the US.

In the US, there was a higher peak audience for the Women’s World Cup Final than the MLB World Series and NBA Finals, with 25.2 million viewers tuning in for the showdown between the USA and Japan.

FIFA Women’s World Cup 2015

The Fifa Women’s World Cup 2015 hosted in Canada was the most successful women’s football tournament of all time and a huge missed opportunity for sponsors.

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2015 was a big year for sport and a big year for the number of competing athletes. Nearly 70,000 athletes (69,703) competed in the selected 83 events studied by the GSI Report. Of these just under 60% (59.4%) were male and just over 40% (40.6%) were female. The IOC’s Agenda 2020 has a long way to go before there is gender equality in world championships and multisport games.

Inequality seemingly applies not just to the number of male to female competitors but also within the disciplines that women and men compete in.

In tennis, for example, during the major Grand Slam events the men contest five-set matches while the women contest three-set matches. Novak Djokovic created a major storm over women’s pay in March 2016 when he suggested that male players should earn more than the women as they generate more income and play more matches. Within days he had to retract his statement after his comments created a major backlash that included some of his fellow male competitors. Tennis is one of the few sports where there is relative equality.

In cycling the retired Olympic champions Nicole Cooke and Victoria Pendleton came out in support of British cyclist Jess Varnish’s claims of a culture of sexism in British cycling, resulting in the suspension and subsequent resignation of British Cycling’s chief coach, Shane Sutton, in April 2016.

This is exemplified by the fact that there are significant differences in the distances over which men and women compete. In the track cycling team sprint event the women compete over 500 metres while the men compete over 750 metres.

Cooke went on to question why there wasn’t a single woman in a leadership position within British Cycling and a similar question could be asked of the international body, the UCI.

But many people felt that 2015 represented a watershed moment for women’s sport and in particular women’s soccer.

The Fifa Women’s World Cup attracted a huge global audience, with TV coverage on major channels throughout the world. The event also recorded a record-breaking attendance of 1,353,506 to watch a record number of players (552) from 24 nations competing over the 30 days of competition.

The winning team at the competition, USA, occupies a strong enough position in the sport that they felt empowered to threaten to go on strike ahead of the Rio Olympics over wage discrimination.

Five players from the women’s team filed a complaint in March 2016 against the U.S. Soccer Federation after the women’s national team made $2 million for winning the Women’s World Cup while the men’s team had made $9 million for losing in the round of 16 in the men’s World Cup in 2014.

The men’s team won one match, drew one and lost two, reaching the round of 16 before losing to Belgium. The women’s team beat Japan 5-2 in a thrilling final, in a truly globally-covered final, and won six matches and drew one during the course of the tournament.

A judge ruled in June 2016 that the U.S. women’s team could not strike ahead of the Olympic Games based on a no-strike clause in a collective agreement between the federation and the U.S. Women’s National Soccer Team Players Association, which expired in 2012 and was renewed on a memorandum of understanding in 2013 with terms lasting until 2016.

While the ruling meant the players could not strike, it didn’t mean that the players were not entitled to equal pay for equal work.

Our industry experts look at the impact the Fifa Women’s World Cup had on women’s sport in Canada and how some governing bodies are trying to rise to the challenge of the IOC’s Agenda 2020 programme and increase equality within their sports.
The social impact of sports events is arguably one of the most difficult to measure and thus frequently ignored, and yet it is often presented as a justification for hosting sports events.

Encouraging people to participate in sport, to get active and engaged, is frequently given as reasons to host major sporting events, in particular the Olympic Games.

While there is anecdotal evidence that sports events encourage people to be more active, there is very little concrete proof that this is the case. Yet increasingly governments are having to deal with growing levels of obesity, and sport is viewed as one of the potential solutions to this problem.

Throughout the GSI Project and the GSI Event Studies programme we have seen examples of social impact being achieved through hosting sports events. School education programmes, developed around major sporting events, do take place but very little is documented and there is almost no post-event analysis to see if these programmes have been effective or successful.

Social impact should be a much higher priority for all host cities or successful. Without a clear methodology for assessing social impact that are felt through hosting sports events are often lost. Event organisers seldom have the inclination or ability to record these impacts, due to the lack of recognised methods to record and share these experiences and transfer the learnings and knowledge to future hosts.

There are many examples of significant social impacts being generated by sport yet rarely do these impacts make it past local media outlets and governing bodies are largely oblivious to them, resulting in their inability to express social benefits from hosting their events.

The GSI Event Study of the World Archery Championships in Copenhagen showed that the event was supported by 202 volunteers, most of who were either from local archery clubs or from the national volunteering programme that has been established to provide an experienced and knowledgeable volunteer base to all events hosted in Denmark.

It is these types of nation or city-based volunteering programmes that have a significant social impact within a host country and the establishment of these programmes is definitely accelerated by the hosting of major sporting events. One of the positives coming out of the Sochi Winter Olympics was the establishment of a volunteering programme in Russia that had never existed before those games.

But volunteering is only one aspect of social impact, and others like social engagement and public perception are key elements that need to be recorded and measured.

Public perception has become an increasingly important factor in deciding whether cities are prepared to host major sporting events. We have seen the impact that public perception has on the decision to host such events like the recent polls in Germany for two successive Olympic bids, the Winter Games in 2022 and Summer Games in 2024, where the public voted against bidding for both events.

Sweden, Norway, Switzerland and USA have all seen similar votes go against bidding for major Olympic events. Public perception is opposed to mega events like the Olympic Games because the focus is on the economic cost, not the social benefit.

The social benefit of these events has not been properly assessed and therefore if positive impacts have been created they have not been captured and therefore some of the more intangible benefits have been ignored.

Failure to improve the capture of the social impacts of sport will result in the continuation of the general public perceiving that sport does not deliver real benefits.

Many reports refer to the economic impact of events and rarely focus on the social aspects, leaving this area vastly under-researched and misunderstood.

With a lack of knowledge and understanding on the subject, cities and governments are unable to highlight the social impacts that sports events can produce for its citizens.

Narrative and insight (both positive and negative) relating to the social impacts that are felt through hosting sports events are often lost. Event organisers seldom have the inclination or ability to record these impacts, due to the lack of recognised methods to record and share these experiences and transfer the learnings and knowledge to future hosts.

Agenda 2020 highlights some key themes relating to the social impact of sport in recommendations 22 and 23:

- Community engagement
- Education
- Volunteering

**Recommendation 22**

Spread Olympic values-based education

1. The IOC to strengthen its partnerships with UNESCO to include sport and its values in school curricula worldwide.
2. The IOC to devise an electronic platform to share Olympic values-based education programmes of different NOCs and other organisations
3. The IOC to identify and support initiatives that can help spread the Olympic values.

**Recommendation 23**

Engage with communities

1. Create a virtual hub for athletes
2. Create a virtual Club for volunteers
3. Engage with the general public
4. Engage with youth

In this chapter, the themes of community engagement, youth engagement and education are analysed using examples from the Artistic Gymnastics World Championships which took place in Glasgow, United Kingdom, the World Archery Championships in Copenhagen, Denmark, and the Special Olympics Summer World Games which took place in Los Angeles, USA.

The theme of volunteering is analysed in full across all world championships and multisport games to have taken place in 2015.
Legacy and Sustainability

Legacy, or the latest buzzword ‘sustainability’, has been a constant source of debate since the 1970s when Montreal was virtually bankrupted by the Olympic Games and became the benchmark by which all other major sporting events were judged.

As part of the GSI Project, Sportcal is developing a framework to understand the basic elements of legacy and to provide a consistent methodology for assessing the impact of major sporting events like the FIFA World Cup or the Olympic Games.

But what do we really understand about ‘legacy’, what precisely does it mean and do major sporting events really leave a lasting ‘legacy’?

To address the first of these questions we asked Dr Eleni Theodoraki, a leading academic authority on legacy from Edinburgh Napier University to provide us with her definition of legacy, how sustainability came into the sporting lexicon and whether these ‘mega’ events truly do leave a benefit for their host nations.

The term legacy is used in the context of mega sport event (MSE) impacts to indicate the long-term effects of event preparations and hosting. Legacy can be deemed positive, negative or mixed, depending on whose opinion is considered, when and under what conditions.

MSE comes into being at the bid stage. If awarded hosting rights the country/city then embarks on the build-up period which involves major urban development projects. Shortly before the start of the event organisers physically move into the venues for the event phase. Then, after the event, at the wind-up stage, organising committees dissolve and any facilities contracted for the event revert to their owners (e.g. stadia, housing), or are sold.

Event impacts happen at all stages of the events lifecycle. They are multi-dimensional, multi-temporal and multi-spatial. Dimensions range from economic to social, political, environmental, and physical. They can be felt before, during and after the event, locally, regionally, nationally and even globally. Likewise, groups of people can be affected in different ways. For example, property price increases might be positive to house owners but not to those wishing to get on the property ladder. Furthermore, money invested by the government for urban development related to the event in the build-up period can give employment to many people, but if the country has high national debt this extra expenditure might mean higher taxes and fewer services further down the timeline.

The concept of sustainability is a related term that has entered the lexicon of MSE hosting as host governments have to address critics of the negative environmental impacts of the event, in the form of related carbon and greenhouse effect gas emissions, to name but a few. Sustainable development is development that meets the needs of the people today without compromising the chances of future generations in meeting their needs (Brundtland Commission, 1987). It is fundamentally about avoiding depletion of resources (environmental, human, financial, physical and cultural) or damaging fragile habitats.

Accepting the climate change threat, it is impossible to claim that modern MSE like the Olympic Games or the World Cup are sustainable under the Brundtland Commission definition. This is a claim also made by the Commission for a Sustainable London 2012, where I served as commissioner and which added that the only way the event can be sustainable is if it inspires changes in behaviour that balance the negative impacts (Commission for a Sustainable London 2012, 2013).

On the topic of sustainability, it is important to consider appropriateness of the governance model and whether those that initiated the bid and those in charge of planning it were planning for legacy requirements of their city/community many years down the line at the legacy stage, or whether they were planning for games-time requirements of the event owners/
Event Analysis

The event analysis pages showcase data from the 83 multisport games and world championships featured in this report, complete with each event’s GSI Event Rating, and its GSI Event Ranking out of all events in 2015.

Up to 39 individual data points are presented for each of the 83 major events of 2015, allowing us to analyse and compare the relative impacts that are created by each event, and include tourism impact insight from Sportcal’s exclusive bed nights analysis.

GSI Event Rating

The GSI Event Rating Breakdown details the proportion of the event’s GSI Event Rating attributed to economic, sporting, media and social impacts. Where limited data was available for an event, this breakdown might score zero for those impacts.

Each GSI Event Rating was calculated using data which was made available up to 30 April 2016.

As a result of rounding up or down, the GSI Event Rating Breakdowns may not total in some cases.

Bed nights

Bed nights detailed in the event analysis are for ‘participants and media’, comprising athletes, officials (team and technical), and accredited media only. The calculations were formed using the methodology detailed in the Sports Tourism chapter.

The calculations give an insight into the number of bed nights each event generates, before a single ticket is sold, or before overseas spectators are counted.

Sportcal’s participant and media bed nights methodology does not take into account whether accommodation was paid for by visitors or by organisers/hosts.

TV coverage

Sportcal’s analysis of TV broadcasters and TV nations is for live, delayed and highlights broadcast only.

Some event pages detail extended TV coverage, which also includes news and magazine programming.

Not all international federations and/or local organising committees measure media data to this extent and therefore only data which was made available has been included in this report.

Estimated data

Data points marked with an asterisk (*) have been estimated using a combination of factors including international federation and local organising committee estimates, previous event data and official event communication materials.
Event Analysis

FAI World Air Games
Dubai 2015

Sport
Air Sports

Organiser
Emirates Aerosports Federation
City, Nation
Dubai, UAE

Event Frequency
Irregular

Statistics

ECONOMIC
Total Attendance 7,360
Ticketed Attendance 3,482
Non-Ticketed Attendance 3,878
Venues 6

BED NIGHTS
Visitor type Estimated bed nights
Athletes 5,800
Officials - Team 3,400
Officials - Technical 0
Accredited Media 400
Total 13,700

SPORTING
Competitors - Total 951
Men / Women
Overseas / Domestic
Continental Reach 3
Competing Nations 52

OFFICIALS
Team 43
Technical 231

MEDIA
TV Continental Reach 115
TV Nations 4
Broadcasters 42
Extended TV Coverage: Nations 200
Extended TV Coverage: Broadcasters 217
Accredited Media 150

SOCIAL
Volunteers 231

Competing Nations By Continent

ECONOMIC
61%
SPORTING
17%
MEDIA
7%
SOCIAL
15%

Statistics

GSI Event Rating Breakdown

2015 GSI Overall Ranking
48th out of 83 events
GSI Event Rating 2015
905 pts

Event Analysis

World Archery Championships 2015

Sport
Archery

Organiser
Danish Archery Federation, Sport Event Denmark, Wonderful Copenhagen
City, Nation
Copenhagen, Denmark

Event Frequency
Biennial

Statistics

ECONOMIC
Total Attendance 7,360
Ticketed Attendance 3,482
Non-Ticketed Attendance 3,878
Venues 2

BED NIGHTS
Visitor type Estimated bed nights
Athletes 5,800
Officials - Team 3,400
Officials - Technical 0
Accredited Media 400
Total 13,700

SPORTING
Competitors - Total 951
Men / Women
Overseas / Domestic
Continental Reach 3
Competing Nations 52

OFFICIALS
Team 43
Technical 231

MEDIA
TV Continental Reach 115
TV Nations 4
Broadcasters 42
Extended TV Coverage: Nations 200
Extended TV Coverage: Broadcasters 217
Accredited Media 150

SOCIAL
Volunteers 231

Competing Nations By Continent

ECONOMIC
61%
SPORTING
17%
MEDIA
7%
SOCIAL
15%

Statistics

2013 GSI Overall Ranking
57th out of 83 events
GSI Event Rating 2015
707 pts

EDITIONS
First Edition 1997
Number of Editions 4

CONTINENTAL REACH
Africa 0
Asia 0
Europe 0
North America 0
Oceania 0
South America 0

Event Hosting

Post/Future Editions

2001
Seville, Spain
2009
Turin, Italy
2015
Dubai, UAE
2019
TBA
2023
TBA

2011
Turin, Italy
2013
Antalya, Turkey
2015
Copenhagen, Denmark
2017
Mexico City, Mexico
2019
s-Hertogenbosch, Netherlands
### World championships and multisport games (GSI events)

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<th>EVENT/COMPETITION</th>
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<tbody>
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<td>FAI World Air Games Dubai 2015</td>
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<td>Athletics</td>
<td>IAAF 41st World Cross Country Championships 2015</td>
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<td>Athletics</td>
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<td>Beach soccer</td>
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<td>47th World Biathlon Championships 2015</td>
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<td>Bobsleigh</td>
<td>BMW FIBT Bob &amp; Skeleton World Championships 2015</td>
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<td>AIBA World Boxing Championships 2015</td>
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<td>Cycling - BMX</td>
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<td>Cycling - mountain bike</td>
<td>UCI Mountain Bike and Trials World Championships 2015</td>
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<td>FISA World Rowing Championships 2015</td>
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### World championships and multisport games (GSI events) (continued)

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## Major Cups, Leagues, Series and Tours

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## Events

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