ABOUT SPORTCAL

Sportcal is the most comprehensive provider of sports market intelligence worldwide. It is the essential resource for anyone in the business of sport. Sportcal has been at the forefront of sports market news, data, analysis and insight for over 25 years. The product suite includes; News, Calendar, Directory, Media, Sponsorship, Events and Bidding. Sportcal also publishes a bi-monthly magazine, Sportcal Insight, and a range of publications.

Sportcal is also the lead partner of the Global Sports Impact (GSI) project. The GSI project aims to create an internationally accepted methodology for measuring the impact of major sports events across the globe.

Sportcal was founded in the UK in 1991 by Chief Executive Mike Laflin. Mike is one of the leading authorities on global sports market intelligence. He has been involved in sport for over 25 years, working extensively for a wide range of Olympic and non-Olympic sports.
Global Sports Impact Report 2016 / Executive Summary

Sport has a massive global impact and 2015 was no exception to that. Over 80 world championships and multisport games took place in 2015, generating millions of spectators and billions of hours of media coverage. Supported by the major annual events, they have a huge impact on the world’s economy.

But what do we really understand about this impact and how do we accurately explain it to governments, ministries and the general public? There are no consistent standards and methodologies to clearly define the annual impact of sport.

This second edition of the Global Sports Impact (GSI) Report explores the impact of sport in 2015 and 2016, reviewing the major events of 2015 with all the latest developments in 2016, and examines some of the key issues and challenges facing sport in the future.

2015 was another huge year for sport with the Rugby World Cup hosted in England and Wales; the Cricket World Cup taking place in Australia and New Zealand; the Women’s Fifa World Cup in Canada, and world championships in athletics, swimming and many other Olympic and non-Olympic sports. Multisport games included the Universiade in Gwangju, Korea, the Pan American Games in Toronto, Canada and the Special Olympics Summer World Games in Los Angeles, USA.

The GSI Report 2016 studies these major events covering 83 world championships and multisport games hosted in 118 cities and 38 countries.

These events alone generated over 13 million spectators and created a huge economic impact for their host cities. But how much impact did these events really have? According to some reports the Rugby World Cup generated over $3 billion (£2.4 billion) of economic impact. But how do we compare the impact generated by the Rugby World Cup to the impact generated by the African Games in Brazzaville, Congo?

According to analysis by Sportcal these 83 events alone generated a potential net impact of $400 million before a single ticket was sold and an overseas tourism impact well in excess of $2 billion. Our Sports Tourism section explores how sport is driving one of the fastest-growing sectors of tourism and how cities are using sport to drive economic development and tourism.

But economic impact is not the only effect that the GSI Report 2016 looks at. Sport delivers a range of impacts: media; sporting; social and legacy.

The GSI Project aims to develop ways of expressing these impacts and thus enabling a better understanding of the true impact of sport.
Sport has the power to change the world. It has the power to inspire. It has the power to unite people in a way that little else does. It speaks to youth in a language they understand. Sport can create hope where once there was only despair. It is more powerful than government in breaking down racial barriers.

NELSON MANDELA

GSI Report 2016

Contents

1: GLOBAL SPORTS IMPACT PROJECT
The Global Sports Impact Project in 2015 focused on the development of the GSI Event Studies Programme.

Sportcal conducted three GSI Event Studies in 2015:
- World Archery Championships in Copenhagen, Denmark
- WTF World Taekwondo Grand Prix Final in Mexico City, Mexico
- FAI World Air Games in Dubai, UAE

These studies identified the broader impacts major world events have beyond the purely economic, and described how frequently these impacts are underestimated and incorrectly explained.

2: EVENT HOSTING AND BIDDING
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. 38 nations hosted the 83 events studied in 2015 in 118 cities.

The GSI Report analyses which were the top host cities and nations in 2015.

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

Corruption, doping, match-fixing and major governance issues dominated the headlines. Fifa’s president, Sepp Blatter, stepped down amid a storm of corruption claims against his executive committee members and himself. The IAAF, athletics’ world governing body, became consumed in a major doping scandal involving its former president, Lamine Diack, and ‘state-supported’ doping by Russia’s top athletes. ARAF, the Russian athletics federation, was suspended and Russian athletes had to apply for ‘exceptional eligibility’ to compete at the Olympic Games in Rio de Janeiro.

The GSI Report analyses some of these developments, and a group of leading academics and experts in the area of sports governance comments on what sport needs to do to regain its global credibility, while remaining independent and transparent.
4: ECONOMIC IMPACT
The 83 events studied in 2015 for the GSI Report attracted over 13 million spectators and created a huge economic impact for their host cities. But how much impact did these events really have?

In this section of the report we examine five of the major events of 2015 to see what was reported and how these impacts were calculated, and we apply the GSI methodology to compare them.

The events analysed are:
- Rugby World Cup
- ICC Cricket World Cup
- Fifa Women’s World Cup
- UCI Road World Cycling Championships
- World Archery Championships

5: SPORTS TOURISM
According to analysis by Sportcal the 83 events studied generated a potential net impact of $400 million before a single ticket was sold, plus an overseas tourism impact of well in excess of $2 billion.

The Sports Tourism section explores how sport is driving one of the fastest-growing sectors of tourism and how cities are using sport to drive economic development and tourism.

6: MEDIA IMPACT
Billions of people watch billions of hours of sport every year and yet sport still has a problem in expressing its media impact.

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.

7: SOCIAL MEDIA IMPACT
The GSI Report examines the fan bases that have been developed on social media by federations, leagues and events to see which are generating the largest followings.

But the size of the fan base is of limited value. Engagement and tone are of far more value than pure volume. Our industry experts examine various ways in which social media can be measured and offer some far more compelling alternatives for measuring social media value.

8: SPONSORSHIP IMPACT
The corruption and doping issues that broke around sport similarly affected sponsors. Some sponsors cancelled their association with certain sports while others cut back on their activation programmes around major events. This was very noticeable around the Women’s Fifa World Cup in Canada where very few sponsors activated around the event, either because of the political turmoil that had engulfed Fifa or because they simply didn’t see the fit between women’s football and their brands. The Sponsorship Impact section explores how sponsors activated around some of the major events in 2015 and which were the most prominent.

9: SPORTING IMPACT
Over 70,000 athletes participated in the 83 major events studied by the GSI Report 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.
10. SOCIAL IMPACT

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 identified 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.

Over 114,000 volunteers supported 77 of the events studied in the GSI Report with the Pan/Parapan American Games using the highest number of volunteers in 2015.

11. LEGACY IMPACT

Legacy, the word used for many years to describe what impact is left after the event has moved on, has been replaced by a new buzzword: sustainability.

But whatever the term, the important question is: Does sport really deliver a positive impact for the host nation, whether that be economically, socially or otherwise?

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 Rio.

12. EVENT ANALYSIS DATA

Where do each of the 83 world championships and multisport games in 2015 rank, according to GSI’s innovative scoring system?

How many spectators, athletes, officials and media visited each event? And how many bed nights did the event participants create?

The events pages present up to 39 data analysis points on each major event of 2015, analyse the relative impacts that are created by each event, and include tourism impact insight from Sportcal’s exclusive bed nights analysis.
GSI Report 2016

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The Fifa World Cup is the largest international single sport event in the world and takes place every four years. There are 32 competing teams split into eight groups with the top two from each group progressing to the round of 16 knockout stages.

Brazil hosted the event for the second time having previously won the event five times, more than any other nation. Organisers sold in excess of 3 million tickets for the event with substantial numbers of non-ticketed spectators visiting fan zones located throughout various cities in Brazil.