

Economic and Social Impacts
The Tour de France 2014

Impacts of the Tour in York

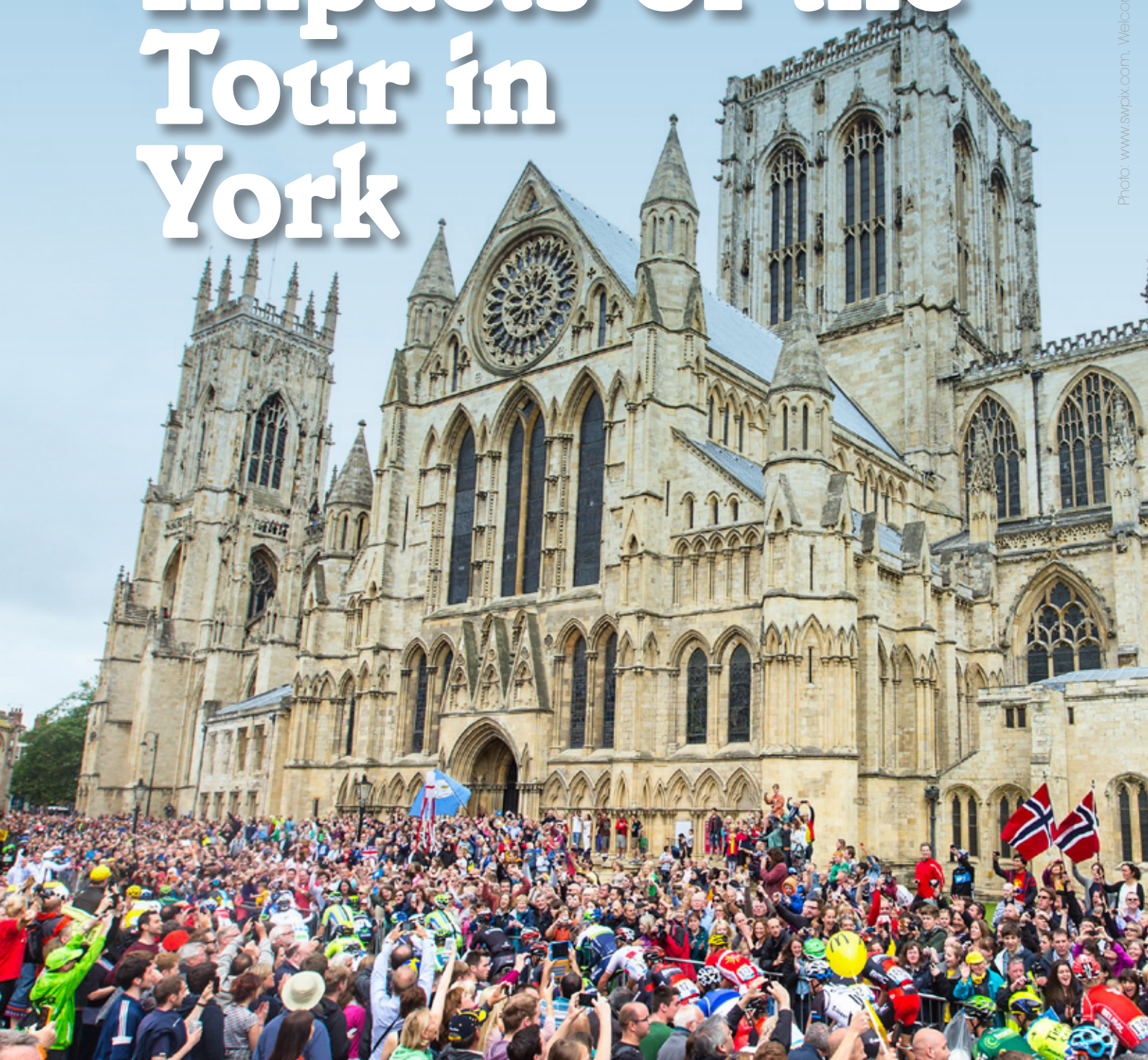


Photo: www.swpix.com, Welcome to Yorkshire

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Introduction:

an occasion like no other

In July 2014, the eyes of the world were on Yorkshire, Cambridge, Essex and London as they staged the first three stages of the 2014 Tour de France. The Tour is the largest annual global sporting event, and the oldest and most iconic cycle race in the world.

An overall report (Three Inspirational days)¹ sets out the findings of a comprehensive research programme to assess the economic and social impact of staging the Yorkshire Grand Départ and the Cambridge to London third stage of the 2014 Tour. The impacts were analysed using a nationally recognised and accepted methodology (eventIMPACTS).

York hosted the start of Stage 2 of the Yorkshire Grand Départ. This report analyses the local impacts of the Tour de France coming to the city. It sets out the impacts on the local economy, together with perceptions from local residents and businesses. It also examines the views of visitors who came to the area for the event. The report includes local photos, case studies and maps. It also examines the local cycling legacy.

Methodology

The study was guided by the nationally recognised, industry standard methodology - [eventIMPACTS](#). This isolates the 'additionality', i.e. the difference, that hosting an event made to the economy. However, due to the size, scale and uniqueness of the event we have also considered a broad range of other information and research.

An independent research agency, SPA Future Thinking, was commissioned to carry out the primary research, which included four surveys:

- A face to face survey of over 4,000 spectators during the event and a follow up three months later. 180 interviews undertaken in York;
- A survey of over 700 businesses across the 3 UK Stages immediately following the event with a

follow-up three months afterwards;

- A survey of 2,200 volunteer Tour Makers;
- A survey of a nationally representative sample of the UK adult (over the age of 16) population.

A more detailed description of the methodology can be found in the Appendix.

The overall impact report

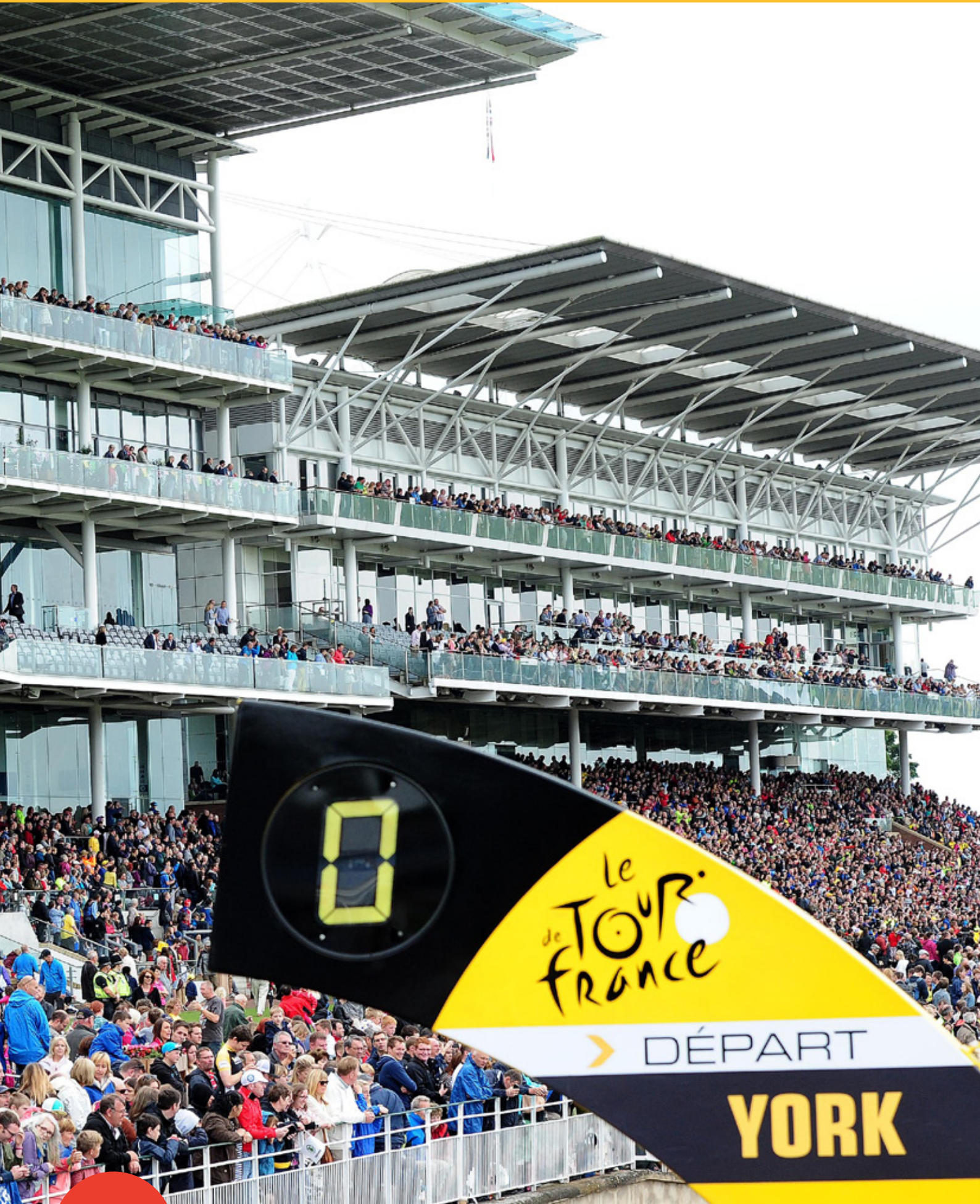
This work was commissioned, on behalf of all of the delivery organisations, by Leeds City Council, Transport for London, UK Sport and TdFHUB2014 Ltd. The majority of the primary research was conducted by SPA Future Thinking.

This local impact report was commissioned by City of York Council



Photo: Leeds City Council

¹ <http://www.leeds.gov.uk/docs/141203%20THREE%20INSPIRATIONAL%20DAYS%20FULL%20FINAL.PDF>



Staging the event: work of the council and partners

A huge amount of preparation went into bidding for, planning and successfully delivering the event. This involved a large number of organisations, over 100 at the last count, who united to deliver the world's biggest annual sporting event. As well as staging the race partners worked to maximise the benefits by having a programme of activity to engage business and residents.

Bidding for the Grand Départ

Early in 2012, a campaign began to bring the Grand Départ to Yorkshire. A formal bid to host the event was submitted to the ASO (the owners of the Tour de France) by Welcome to Yorkshire (the official destination management organisation for Yorkshire) in March 2012, supported by a number of local authorities.

Over the summer of 2012, public awareness grew, and a nine month campaign to show the scale of support to 'Back Le Bid' was built. More than 170,000 people gave their support, including the President of France, Francois Hollande. Alongside the official bid, Welcome to Yorkshire implemented a fully integrated marketing campaign and engaged with members of the public and businesses across all sectors of the economy.

In December 2012, ASO announced their decision to hold three Stages in the UK and details of the routes were announced in January 2013 at the 'La Nuit du Tour', a celebratory evening of bands, children's choirs and fireworks which set the tone for the 18 months ahead.

Stage 2 of the Grand Départ began in York at the York race course. It processed through the city, passing York Minster, before heading out of the centre past Poppleton and towards Harrogate.

Stage 2 route



The Tour route through York



The hard work begins

Once the bid was won a unique partnership came together to plan for and deliver the event:

- ASO (Amaury Sports Organisation) – commercial body, owners of the Tour de France;
- Welcome to Yorkshire – main contract holder;
- Local authorities – event organisers within their own boundaries, including City of York Council; and
- UK Sport – Government sports agency providing route for £10m funding, assurance of programme and event support.

The Government set up TdFHUB2014 Ltd, a not-for-profit organisation to co-ordinate planning and delivery of Stages 1 and 2 of the Tour in Yorkshire and to work with Transport for London on Stage 3 from Cambridge to the capital. It brought all of the key delivery partners together and managed the £10m Government contribution to staging a safe and secure event. Work was organised around a number of themes:

- Venue and route operations
- Safety and security
- Transport and highways
- Communications
- Finance and procurement
- Coordinating local authority delivery

The key to successful delivery and the feel good factor was the integration of services across geographic areas so that it felt like one event over all three days, with services (public and private) working seamlessly together.

As part of the planning Asda worked with Welcome to Yorkshire and TdFHUB2014 Ltd to recruit and train a volunteer army of 8,000 Tour Makers. Tour Makers roles ranged from welcoming international visitors, to supporting the emergency services and being a friendly and reassuring face at the event.

The programme was very successful with the

volunteers more than living up to the 'happy to help' message displayed on their uniforms. They were key to creating the fun, relaxed atmosphere that made the Tour so enjoyable.



Vijay Dayalji (Tour Maker),

"I'd have paid to do it. If I can make one person's day better - because I show a child where the toilets are or whatever it is - I'll be happy, because I'll be part of the legacy of cycling in Yorkshire."

Business engagement

Organisations worked hard to inspire and inform the business community. Work began in 2013 with Grand Départ roadshows run by Welcome to Yorkshire for visitor economy businesses across Yorkshire. These attracted hundreds of participants and led to a rolling programme of workshops organised by local authorities, Welcome to Yorkshire and the Local Enterprise Partnerships.

City of York Council worked with Welcome to Yorkshire to stage the roadshows in York. The Council supported businesses to ensure that not only could businesses take advantage of the opportunities that the race provided, but that any negative impacts were minimised as much as possible.

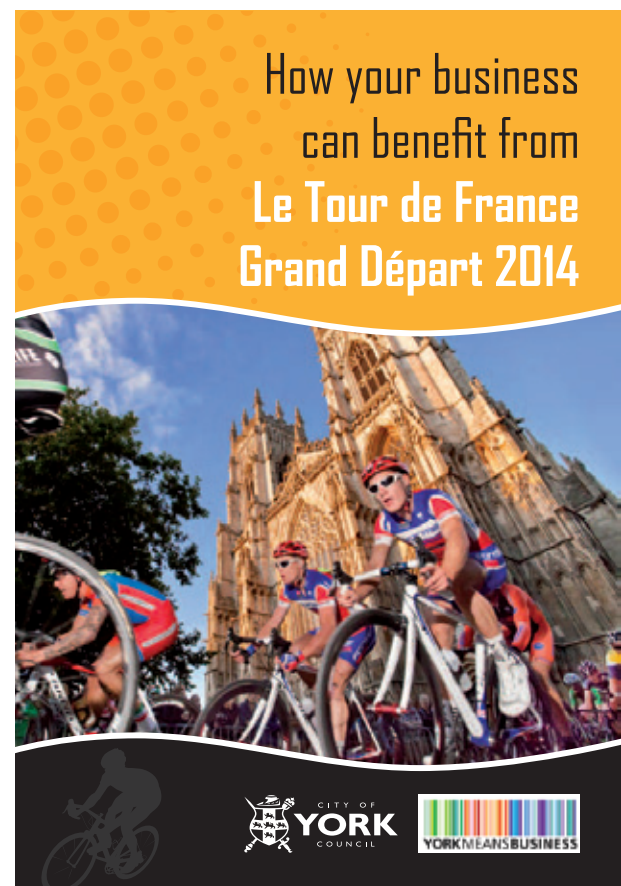
A toolkit for businesses was produced and more than 100,000 were distributed across Yorkshire in the year before the event. There was a clear message to the business community: that they should prepare well in advance and plan how best to benefit from the opportunities presented. City of York Council also produced a local 'How your business can benefit' brochure which provided a complimentary local guide.

Working with the government's export and international trade body UK Trade and Investment (UKTI), Welcome to Yorkshire, Marketing Sheffield and Leeds and Partners, the Yorkshire Grand Départ International Business Festival was organised for the week before the event.

This was the first time a business festival had been organised in conjunction with the Tour, and more than 2,000 participants from 25 different countries were welcomed.

In total, 25 events were held in Leeds, Sheffield and York that explored the heritage and strength of the Yorkshire economy in fields as diverse as sports science, advanced manufacturing, textiles and health informatics. A new business network for

collaboration with China was launched, a game jam competition saw regional talent seeking to create new products themed around cycling and the importance of Yorkshire in the bio-economy was highlighted at an international conference in York.



Celebrating the Grand Départ through culture

Welcome to Yorkshire announced the first Yorkshire Festival, sponsored by Yorkshire Water and the Arts Council. This festival of events ran for the 100 days leading up to the Grand Départ - from 27 March to 4 July. It was designed to showcase the region's finest creative talents on a national and international stage, with a full programme of music, dance, theatre, film, art and sculpture. This was also the first cultural festival to be held alongside the Tour.

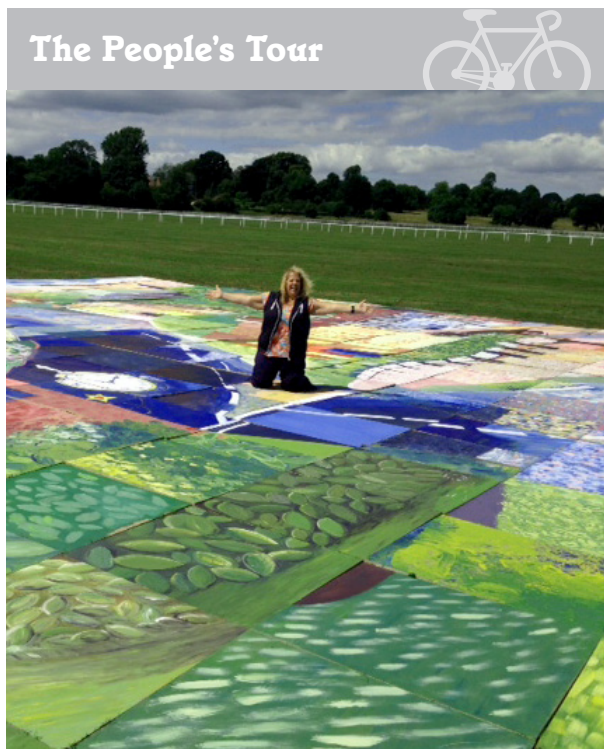
100 days to go . . .

The 100 day countdown was marked at Welcome to Yorkshire's Y14 conference in March 2014, where the first official Grand Départ anthem was launched. That evening, guests attended the 100 Days dinner at Ripon Cathedral where they were given a preview of Yorkshire Festival highlights including poetry and community cinema.

The festival attracted over 800,000 people to 1,400 performances in the 100 days running up to the Grand Départ across Yorkshire, of which a number were in York. Highlights included:

- The Grand Departs - A team of cyclists pulled a grand piano on a PianoPorté up Cragg Vale;
- The Ghost Peloton - a riding team of 50 road racers, stunt cyclists and large-scale projection of dancers all wearing remote-controlled light suits to produce a stunning live choreography; and
- Tour de Brass - free open-air brass-band performances, plus a special Yorkshire Prom by the world-famous Black Dyke Band in York .

Towns and cities along the route, including in York, began to focus on dressing the streets, shop windows, transport hubs and public buildings to make them as welcoming as possible, and to encourage people to think about what they would be doing over the days of the Tour. As July approached, many hundreds of posters, bunting and flags had been distributed



The People's Tour

Road Through York, Community Art Project

Amateur artists from in and around York, including students from adult education, residential homes and schools joined in to re-create an original painting, produced for the project by artist and tutor Karen Winship.

Influenced by the work of David Hockney, the original painting was scaled up and then broken down into 320 metre-squared panels with each panel painted by different people. The finished work was exhibited at York Racecourse on the 6th July as part of the Grand Départ Celebrations.

Claire Douglas, project organiser said, "it was a fabulous project to be a part of. A real community project that created a sense of belonging, a feeling of togetherness and achievement."

and used by businesses. The themes of the Tour's shirt colours – yellow, green and white with red polka dots – become ubiquitous as the host regions were dressed for the show.

The week before

As the race days approached, York, buzzed with activity. Pop-up Grand Départ shops opened in the city, the Tour caravan vehicles began to assemble, and hotels filled with Tour guests.

The city was dressed in the Tour colours and was decorated with bunting. Final preparations were made at York racecourse to accommodate the official start and 28,000 spectators.

A successful opening ceremony to present the teams and riders, hosted at the First Direct Leeds Arena, gave all involved a flavour of the Tour frenzy. The streets were packed as the riders parade travelled from the University of Leeds to the Arena. In the Arena the official Tour song was performed, and the dancers of the Ghost Peloton performed. Singers Alistair Griffin and Kimberley Walsh appeared and Yorkshire band Embrace closed the show to deafening applause. At the same time, 600 bell ringers in 60 churches across Yorkshire rang their bells in celebration, welcoming the world to Yorkshire.

Photo: www.swpix.com. Welcome to Yorkshire



The People's Tour



Orillo Productions

Orillo Productions are a film, television and lifestyle branding company based in York. As a global production company, they work throughout the world and are committed to hosting events that are unique, creative and meet the needs of their target audience.

In 2011 Orillo started holding outdoor cinemas in York, rapidly gaining popularity and catering to those who did not wish to travel as far out as Harewood House and other venues which host similar events. To celebrate the Tour de France, Orillo held a screening of the race in York's Museum Gardens. They teamed up with other local businesses such as PapaKata to provide tents and both Ugot and Filmore & Union for a more alternative food offering. The race itself was screened throughout the day and was followed by an evening showing of the film Jumanji.

With over 700 people attending the event, it was deemed a huge success. Orillo hope to continue to hold unique and creative events in York, building on this hugely successful event.



Our communities: inspired and involved

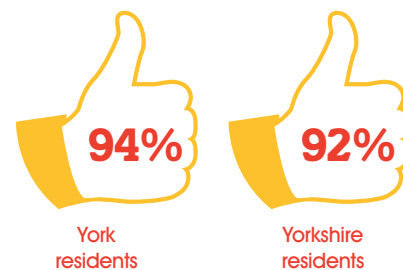
The ethos of the Tour de France is that it is a race that all can enjoy, from those who have cycled hours in advance to stand on the peaks of steep climbs to watch their cycling heroes, to those on deck chairs having a picnic in front of their house.

The people of York, were captured by the romance of the Tour and got involved in ways that nobody could have predicted. Community pride was reflected in the artwork that adorned the route, from knitted bunting to polka dot painted cafés, homemade sculptures to huge land art. Communities worked together to welcome the riders.

Support for the Tour

The survey shows that there was clear and overwhelmingly positive support from local York residents for the event as 94% of residents who watched the stage in the city strongly agreed that the event had been good for the local area, compared to 92% of local residents across Yorkshire who watched Stages 1 and 2.

Figure 1: Hosting the Tour de France has been good for the local area



“I doubt they’ve seen as many people in the stands at York racecourse apart from when the Ebor is run. It looks like the crowds that graced the route on Saturday will be out in force again today. There are thousands watch the riders roll out.”

Photo: York Racecourse



The People's Tour



Marie Curie Cancer Care (Official Charity Partner of the Yorkshire Grand Départ)

Marie Curie organised 300 Grand Départ events in Yorkshire in the month leading up to, and including the Tour, including: cake sales, loom band sales, cycling challenges, having two vehicles in the Tour publicity caravan and a charity bike ride from London to Paris.

On the day of the race, a team of 14 amateur riders, each raising enough money to fund a Marie Curie nurse for a year, cycled the Stage 1 route before the professionals in what was termed the 'Power Peloton'.

In total (monies still being finalised) it is estimated that more than £500,000 will have been raised for Marie Curie from activities directly around Le Tour.

This will fund 25,000 nursing hours for people with all terminal illnesses, allowing nurses to provide patients and their families with free hands-on care and emotional support in their own homes.

“The peloton snakes past York Minster, which has a massive yellow jersey on its roof. Fans are up on walls, traffic lights, hanging out of windows, desperate to get any vantage point. Marcel Kittel with an elaborate kiss to the camera - he has a huge smile on his face, although it may be more of a grimace when he reaches Holme Moss. Terrific scenes again.”

“I think the Tour de France weekend was a great event for York and Yorkshire to be involved in, although the Merchant Adventurer's Hall itself didn't see an influx of visitors during the weekend of the Grand Depart. I suspect the positive coverage may draw people to York later this year and in 2015” Lauren Marshall, Hall Manager, Merchant Adventurers' Hall, York

Bishopthorpe Road Traders Association

The Bishopthorpe Road Traders Association (a group of 60 businesses) was given permission for a stretch of Bishopthorpe Road to remain closed following the race so that a street party could be held, winning them the Best Dressed Street award from Welcome to Yorkshire.

The street party ran from noon until 7pm with a reported 10,000 people attending throughout this time with many of the 50 business and community stalls running out of stock before the day was over.

The usual slogan used by the Association "I love Bishy Road" was changed to "J'Adore Bishy Rue" for the celebrations, and the Association itself sold £3,800 worth of merchandise and over £4,000 in raffle tickets. Profits have been ploughed back into the Association and local community.

The People's Tour



"Overall our revenue was 28% up on the same three days last year and the event was a massive success with everyone getting involved and making it memorable for our visitors and competitors. I was very proud of our City and our region." Samantha Ashby, General Manager, The Queen's Hotel

"Fabulous weekend with such a positive vibe! The hotel was very busy, as expected, but more importantly there is lots of interest in future bookings"

Lionel Chatard, General Manager, Middlethorpe Hall and Spa

"York's always been a cycling city, but it'd be nice to think this would encourage people to take to the roads on cycles."



Spectators: they watched in their millions

Estimating the number of people who watched is challenging at an event like the Tour de France because of its scale and because nobody needs to buy a ticket. Anyone can enjoy the spectacle from the side of the road.

While crowds were monitored during the three days of racing to make sure that people remained safe, a further piece of work was done to estimate how many spectators lined the route across the three days.

Understanding these figures is important to understanding the scale and reach of the event and because it provides the basis for calculating the economic and social impacts. If crowd numbers are over or underestimated, so are the corresponding impacts.

Measuring spectator numbers

A crowd count for an event like this over such a wide area can only ever be an informed estimate but the methodology allowed an educated assessment of numbers to be made in several ways. These numbers were put together to give a full picture over each route and then sense checked with local knowledge and national data to make sure they broadly matched.

The principal method used to identify the total crowd size was through analysis and categorisation of the route. To do this the television footage for the three days was analysed. This allowed us to look at the entirety of the route – so that we counted not only crowds at the busiest parts but also where there were fewer or no people watching. To do this:

- the route was divided into units of 0.5 km;
- these sections were categorised by the types of area and type of viewing point (for example, at King of the Mountains sections);
- using the television footage the crowd was counted at a sample of these sections;
- these crowd counts were used to estimate the

numbers at each type of area and type of viewing point - statistical techniques were used to do this; and

- estimates were then sense checked by the project team using local knowledge and other crowd estimates;

This allowed the team to reach an overall number of spectators for each stage of the race. For the eventIMPACTS methodology it is also important to understand how many people viewed the race from more than one location, or who viewed more than one stage. The spectator survey was used to make this estimation.

Finally a further cross-check was to compare the findings to those of the National Omnibus Survey, which asked people whether they watched the race in person.

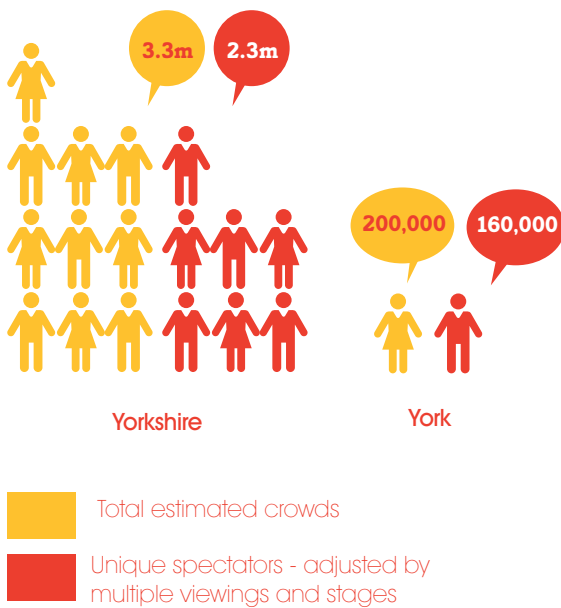
Estimated crowd numbers

This combined research told us that over the two days 3.3 million people lined the route in Yorkshire. Of the 3.3 million people, 1 million people watched from more than one location within one stage, or watched more than one stage, so the total number of 'unique' spectators in Yorkshire was 2.3 million people.

The estimates showed that approximately 200,000 spectators surrounded the route in York, of which 160,000 were unique spectators within the city. Of these, it is known that 28,000 spectators were in York racecourse to see the start

While there is a margin of error, these figures represent as good an estimation of crowd numbers as it is reasonable to make.

Figure 2: Estimated total spectators



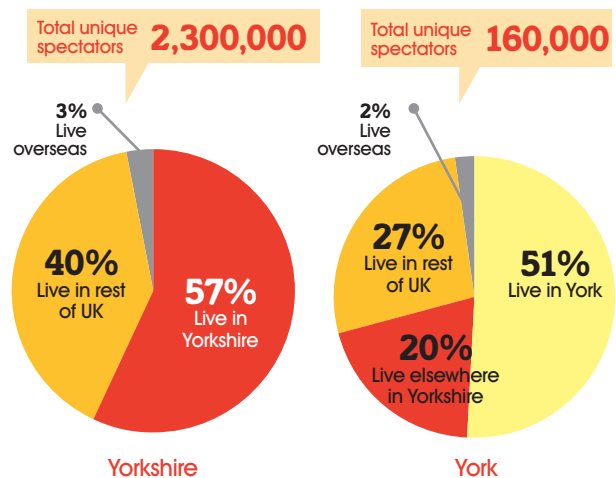
Spectator profile

The attendee survey asked people where they lived, as well as a number of demographic questions. The first of these is important for understanding the economic impact as it is important to understand the proportion of people who were local residents or visitors to the area. It is also important to establish those who did not come out specifically to see the race and were just passing by – ‘casual spectators’.

Results show that large numbers of visitors travelled to watch the event from elsewhere in the UK, as well as from overseas. Approximately 70,000 spectators travelled from outside York to watch the race, including large numbers from outside the UK. These are the numbers on which the visitor spending component of the economic impact calculations are based.

The survey showed that of the 160,000 spectators who watched in York, just under a third were from

Figure 3: Unique spectators by area



elsewhere in the UK, including 2% from overseas. This is shown on Figure 3.

In terms of the demographic profile of spectators, most people were aged between 25 and 65, which shows that interest in the Tour spanned several age groups. The majority of attendees were white and able-bodied, with a smaller proportion of BME and disabled spectators than the UK overall, when compared to data from the Office of National Statistics, although a significant number of people from these groups did attend.

The majority of spectators saw themselves as keen cyclists (defined as those who cycle at least once a week), with less than 30% saying that they did not cycle at all. These proportions were relatively similar across the three stages. This compares to almost two thirds of the UK population overall who never cycle.

A greater proportion of visitors from outside the host regions and particularly from overseas were keen cyclists compared to local residents, showing that cyclists were more likely to make the trip than non-cyclists.

Awareness of the event

According to the National Omnibus Survey, 90% of the sample (the equivalent of 48 million people) was aware that the first three days of the Tour de France taking were taking place in the UK. Publicity was seen by 30% of people (the equivalent of 14.6 million people) in the weeks leading to the event.

The race was watched on television, or on another device, by the equivalent of 18.6 million adults and, as noted earlier, 3.1 million said that they watched the race pass in person. Viewing figures were higher in the areas that hosted the Tour, with one in four of the 93% of Yorkshire and Humberside residents aware of the race.

An average of one million viewers watched ITV's main coverage of day one, with a peak of 2.8 million viewers, while 900,000 more tuned into ITV4. Sunday's York to Sheffield Stage averaged 1.2million viewers on ITV and a further 516,000 on ITV4. According to BARB data the final kilometres of Stage 2 was watched by a peak of 4 million viewers.

Following the Tour online

There was a huge online following of the event over race days and in the period before.

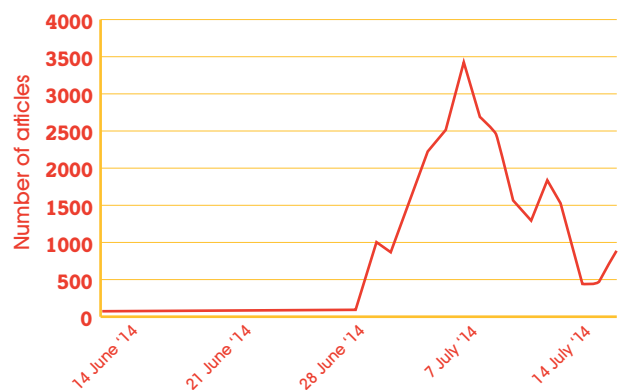
The 'letouryorkshire' website, hosted by Welcome to Yorkshire, was created in December 2012 as the main portal and 'single source of truth' on the Tour de France. As well as the latest news on the riders and teams the website was used by all partners who shared information to be uploaded to help spectators plan their day and know what to expect. For example, local authorities collated advice on how people with disabilities could access the race and METRO (West Yorkshire Passenger Transport Executive) developed an online travel planning system that gave people live travel advice and showed all of the key race points, spectator viewing points and road closures.

Between December 2012 and September 2014, the site received over 5 million visits, including over 3 million unique visits. There were almost 18 million pages viewed.

During the week of the Tour, traffic peaked with almost eight million page views and almost two million visits. These originated from around the world, predominantly from the UK as well as the USA, France, Australia and Germany. The website received thousands of referrals from sites such as the BBC, Facebook and Twitter.

The Twitter feed had 55,000 followers, and grew at around 2,000 new followers a week. During the Tour de France Grand Départ weekend, the terms Yorkshire, Yorkshire Grand Départ and #letouryorkshire all trended on Twitter. The combined reach of @letouryorkshire tweets during the weekend was 23.2 million accounts.

Figure 4: Total volume of coverage, print and online
Source: local monitoring data





From the investment: the economic boost

This section sets out the economic impact of staging the event in York. This aspect is arguably the most complex to calculate, but receives much of the focus as it is considered to be key to judging the success of the event.

This assessment is made at a point in time, having looked only at the period just before, during and after the race. Many of the economic benefits are likely to continue to be realised for years to come, but these are harder to monitor and will need further research in the future.

Measuring economic impact

The eventIMPACTS methodology has been used to calculate the direct economic impact and their guidance defines the economic impacts of an event as "Additional expenditure generated within a defined area, as a direct consequence of staging the event".

Figure 5: Host economies



Different host economies

Using the eventIMPACTS methodology, the process of calculating economic impact involves quantifying the expenditure of people from outside the 'host economy' (essentially any defined geographical area) who are visiting the area specifically for the event. The net expenditure of event organisers within the respective host economies is also included.

Therefore, to calculate economic impact the host economies needed to be defined for the purposes of measuring additional expenditure flowing into them. For this study, the host economies were defined as follows:

- The UK overall – new money coming into the country from overseas visitors and investment;
- The 'host regions' of (i) Yorkshire and (ii) a combined region of Cambridge, Essex and London. This gives an overall figure for the host regions combined as well as separate figures for each and also for London; and
- The other cities in which stages started and finished: Leeds, Harrogate, York, Sheffield and Cambridge

As a result of these different host economy geographies, and therefore individual analysis, the figures must be read separately and do not necessarily sum to the national figures.

The respective host economies are demonstrated in the map opposite. In this report, York is the local host economy area analysed.

The methodology took account of all of the additional expenditure in York, as well as Yorkshire, including from spectators who watched in a number of areas. Each host region and local area is also analysed separately.

Components of economic impact

The additional expenditure generated can be split into two components. These are the direct economic impacts of the Tour, and the wider economic impacts that result from other activities which only happened as a result of the Tour.

The additional expenditure as a result of the Tour de France in York comes from:

- The spending of visitors in the area who specifically came to watch the race. This is the additional revenue as a result of the 70,000 non casual visitors who came to the city to watch the event;
- The attendee survey, which asked questions about:
 - the number of days people planned to spend in the host region;
 - the number of people they were with;
 - the type of accommodation they stayed in;
 - an estimate of the average amount per day their group was likely to spend on restaurants, pubs and takeaway food, public transport, fuel, parking and car hire and other spending.

In addition, the calculation included analysis of:

- organisational spend that was required to stage the event;
- the spending of race teams, the ASO and media from outside the host regions;
- spending of volunteers from outside the host regions;
- the economic impact of Yorkshire Festival;
- additional employment created as a result of the event.

Also factored in was the fact that some resource will 'leak out' of the host regions as a result of people choosing to spend elsewhere, and that some

businesses will have been negatively affected during its staging. However, spending in some of the negatively affected businesses, i.e. those that had to close on the day, may have just been delayed rather than fully lost.

This section considers these issues and presents the overall economic impact, followed by the reported impact on and perspectives of local businesses.

The economic impact

The assessment showed that the event had a significant economic impact and that this is likely to continue. The direct economic impact on all of the 'Host Regions' was £127.9m while for the UK overall (i.e. from overseas visitors, including the teams, overseas media and the ASO) the impact was £33m. The figure was £102.3m for Yorkshire.

The economic impact for York was an estimated £8.3m.

Figure 6 below sets out the detail behind these values. It shows that the main component of impact was from expenditure from visitors from outside Yorkshire, including visitors to the UK from overseas.

Figure 6: Economic impact of the Tour de France

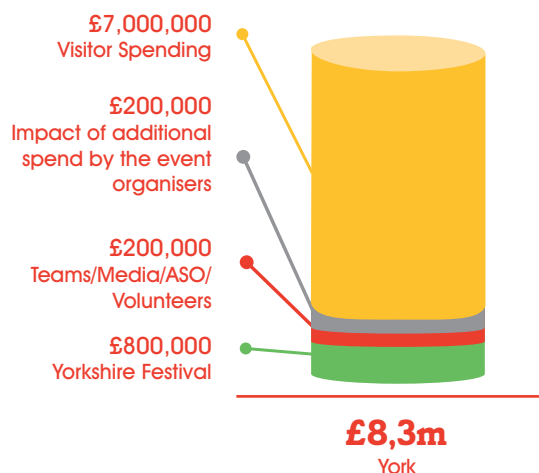
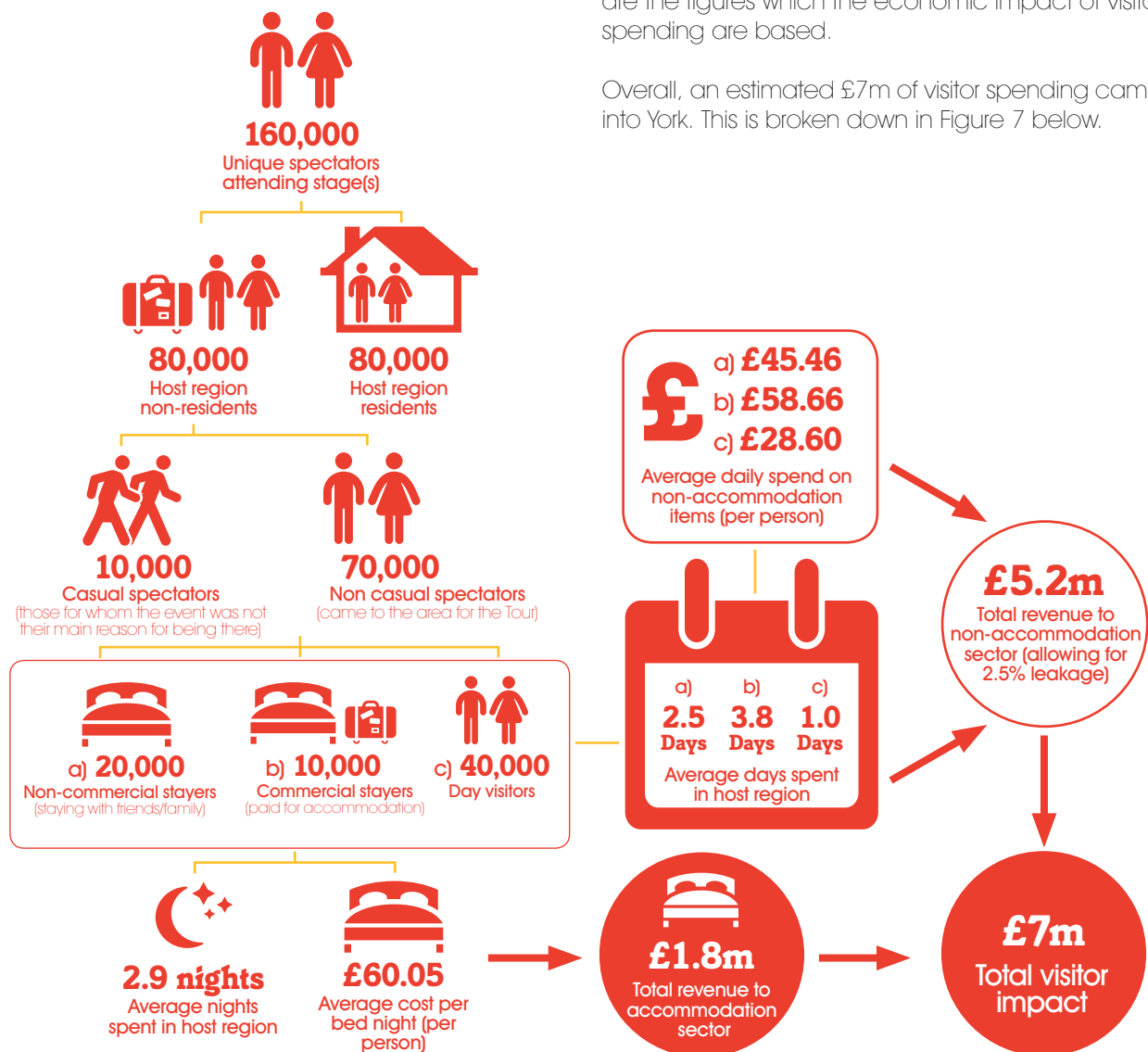


Figure 7: breakdown of regional visitor expenditure for York



Components of economic impact

Visitor spending

The principal component of the economic impact is the expenditure of visitors coming into York to watch the Tour de France.

The spectator survey results showed that 70,000 spectators were non casual visitors to York. These are the figures which the economic impact of visitor spending are based.

Overall, an estimated £7m of visitor spending came into York. This is broken down in Figure 7 below.

Ride25, Yorkshire

Yorkshire-born entrepreneur John Readman and business partner Rob Hamilton set up Ride25 as a result of Yorkshire winning the bid to host the Tour de France. Ride25 is a new flexible way to cycle around the world; split into 25 separate tours, individuals, groups and charities are all invited to take part in as many stages as they wish.

John said: "I always knew there was a strong enthusiasm for cycling in Yorkshire, but still the turnout and the response to the Tour has simply blown me away. It just goes to show the awesome power that cycling can wield – and that Yorkshire's cycling industry can benefit from that."

The People's Tour



Organiser spend

To stage the event local authorities, Welcome to Yorkshire and other partners spent money on planning and a range of infrastructure, such as barriers, toilets, official Grand Départ Spectator Hubs and stewards. Of this combined event budget, £27m was spent in the local economies and will have had an economic impact, although some is likely to have been spent outside the host economies. There was also £10m invested by Government, through UK Sport and managed by TaFHUB2014 Ltd. This was spent testing and exercises for event staff, supporting local authority budgets for infrastructure and the Tour Maker Programme.

Approximately £200,000 of this budget was spent in York.

Spend of 'the entourage' and volunteers

The entourage that accompanies the race is vast. There are the 22 cycling teams and their support staff, the media from elsewhere in the UK and overseas, staff from the ASO (race owners) and the Tour Makers who live outside the host regions. The spending on these all had an impact on the local economies and is counted in the additional economic impacts.

A number of conservative assumptions were made to help to calculate these:

- team spending was based on an average team size of 25 – including riders and support staff. They stayed between 3 and 5 nights in Yorkshire in 4 and 5 star hotels, then a further night in Cambridge and Essex;
- total media from outside the host regions, especially Yorkshire, was estimated at 2,000. They stayed for 2 to 3 nights in 3 and 4 star hotels and bed and breakfasts. The ASO reported that they had never seen as many applications for journalist accreditations;
- the ASO calculated their total bed nights for the entourage as 4,500 for the period of the event, generally 3 star hotels and bed and breakfasts; and
- there were 8,000 Tour Makers. The survey of volunteers established how many lived outside the host regions and their expenditure.

All of this contributed an estimated £200,000 of additional expenditure in York.

Yorkshire Festival

There can be no doubt that the Yorkshire Festival created a buzz in the build-up to the Tour and significantly boosted the visitor economy over of the event. The festival attracted 816,000 people to 2,225 performances, workshops and exhibitions which took place in the 100 days running up to the Grand Départ, a number of which were in York.

An evaluation of the festival was carried out that looked at the overall economic impact. This amounted to a direct contribution of £7,500,000 into Yorkshire. This figure was calculated using the Festival and Event Evaluation Toolkit developed by Create, the support organisation for festivals and events in North Yorkshire, in association with the UK Centre for Events Management at Leeds Beckett University. Of this, an estimated £800,000 was spent in York.

Other Economic Impacts

A range of other expenditure which would have had local economic impact and was not counted in the figures above, to ensure this work is consistent with the eventIMPACTS methodology. These figures tell a broader story about the impact of the event and demonstrate the wider value of the event to the economy. These include:

Yorkshire Grand Départ International Business Festival

The Yorkshire Grand Départ International Business Festival, which ran from 2nd to 4th July, highlighted the businesses of Yorkshire and the UK with a series of events and seminars. It was a Tour de France first and generated a significant amount of business interest in Yorkshire. While the final impact will not be apparent for a few more months, a number of sizeable deals and inward investment inquiries have been registered. If successfully closed, these deals will see the overall economic impact figure for both Yorkshire and the UK increase significantly. Because of the success of this initiative, Utrecht (the 2015 host city for the Grand Départ) are looking at organising a similar business festival.

The People's Tour



Building the Bio-economy

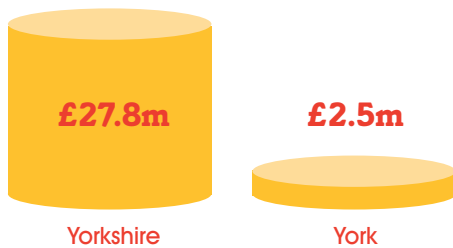
Over the weekend of the Tour de France, partners across York welcomed major industrial biotechnology and agri-tech businesses and investors from across the UK and Europe for an exciting series of events. Companies such as Unilever and GlaxoSmithKline came to discuss opportunities around the Bioeconomy in York and the wider region; with around 70 attending an event at the Ron Cooke Hub on the Friday before the Tour. The highlight of the weekend was a ceremony for the signing of a memorandum of understanding between BioVale (a Bioeconomy cluster for Yorkshire & Humber) and the Northern France based cluster, IAR.

With a high quality delegate list, the events proved very profitable for many involved, with a number of prospective business deals struck over the weekend. Tony Duncan, CEO of Circa Group, an Australian business which has recently expanded to York, said 'It was stunning - and perfect combination of functions...and sport.'

Spending of local residents

While not counted in the additional economic figures, there was clearly an economic footprint from the spending of local residents who attended the event. Assuming the same spending pattern as that for day visitors, the 1.8 million local residents watching the race spent approximately £48m in total. This includes £27.8m in Yorkshire overall. The figure for local resident spending in York was an estimated £2.5m.

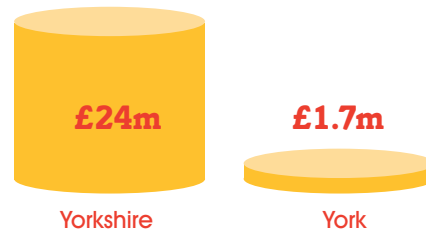
Figure 8: Local resident spectators spending



Future impacts of visiting spectators coming back to the regions

Another key component of the economic impact is the future spending of visitors who will visit again. While not counted in the economic impact figures overall, further visitor expenditure is expected in the future. To demonstrate this, the spectator survey showed that 64% of Yorkshire visitors said that they were very likely to return in the next two years. Assuming the same proportions of day visitors and stayers, as well as overseas visitors recorded at the Tour, this would result in an additional regional impact of £24m in this period. When applied to York, this could result in an additional £2m coming into the city in the coming two years from returning visitors.

Figure 9: Future Impacts of return visits to the host regions



Blossom Street Gallery & Framing,

In the weeks leading up to the Tour de France, Blossom Street Gallery & Framing (an independent art gallery, design shop and framing business) held an exhibition showcasing work by local artists on the theme of 'all things cycling'. The Gallery also encouraged artists to create bespoke Tour de France related merchandise, most of which was exclusively sold there. The exhibition was a huge success, and the merchandise attracted new customers and helped to raise the Gallery's profile. The Gallery has continued to sell and re-stock the Tour de France merchandise as per customers' requests and is planning to hold more themed events.

The People's Tour



Local business perspectives

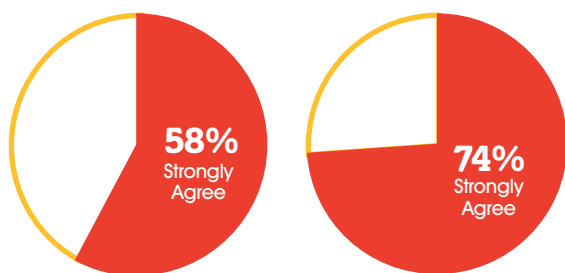
This section presents the perspectives of local businesses and the reported impact of the event on them, based on the findings of the business survey carried out for this research as well as other local surveys. It sets out local business views on hosting the event, followed by the direct commercial impacts as a result of the days of the event and period either side.

This business survey was undertaken across the three UK stages, although it broadly represents local business views in York.

Local business perspectives on hosting the Tour de France

The broad consensus from businesses across the UK host regions was that hosting the UK stages would boost tourism for the future and had enhanced the image of those regions for future marketing and returning visitors. It was recognised however, that some businesses had had to change their usual business operations and there had been some disruption.

Figure 10: Businesses opinions (strongly agree)



This is the kind of event that local authorities should seek to host more of

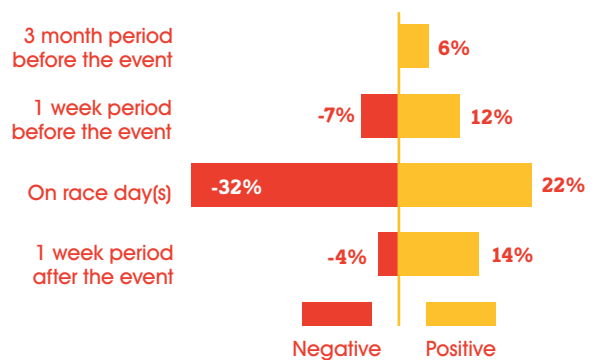
Holding the Tour de France has enhanced the image of the region

Overall, the majority of businesses recognised that an event like the Tour de France was something public authorities should be investing in. In Yorkshire, 58% of businesses strongly agreed while 74% of businesses strongly agreed the image of the region had been enhanced.

Commercial impacts on businesses

While local businesses were broadly supportive of hosting the event, the survey showed that the views of businesses on the impact of the event varied significantly between the pre, during and post-event periods. Views also varied by sector. This is demonstrated in Figure 11 which shows the proportion of local businesses reporting a positive or negative impact over a range of time periods.

Figure 11: % of local businesses that saw a positive or negative impact in sales and attribute this to the Tour de France

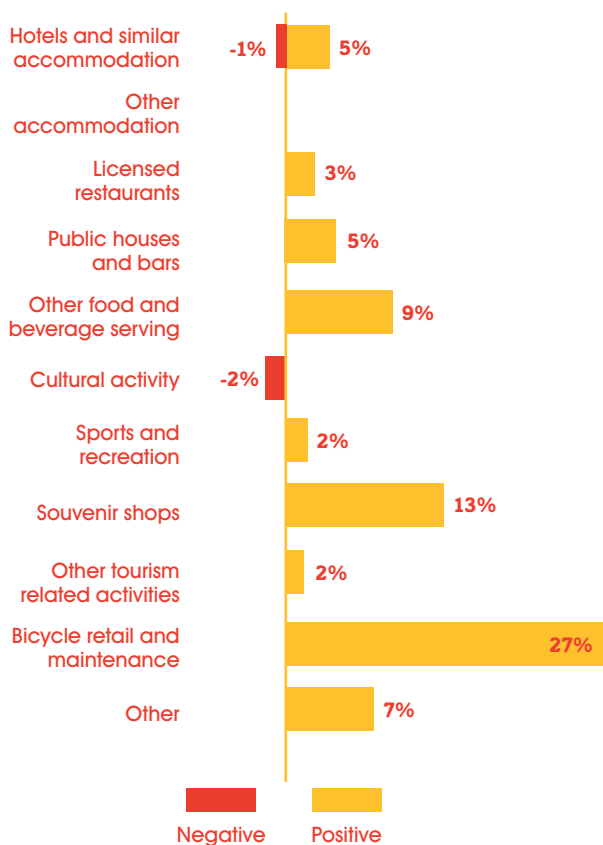


In summary, the survey shows largely positive impacts in the period before and after the event from those who reported them. As may have been expected, most impacts attributable to the event were on the race days themselves and included businesses reporting both positive and negative impacts. Negative impacts included disruption through having to close, or customers being less likely to visit, especially if their premises were away from the Tour route.

Three months before

Only 6% of businesses reported an impact in this period, though they were mostly positive. Figure 12 shows that the main sectors that saw positive impacts in this period were cycling businesses and souvenir shops, together with accommodation and food and drink establishments.

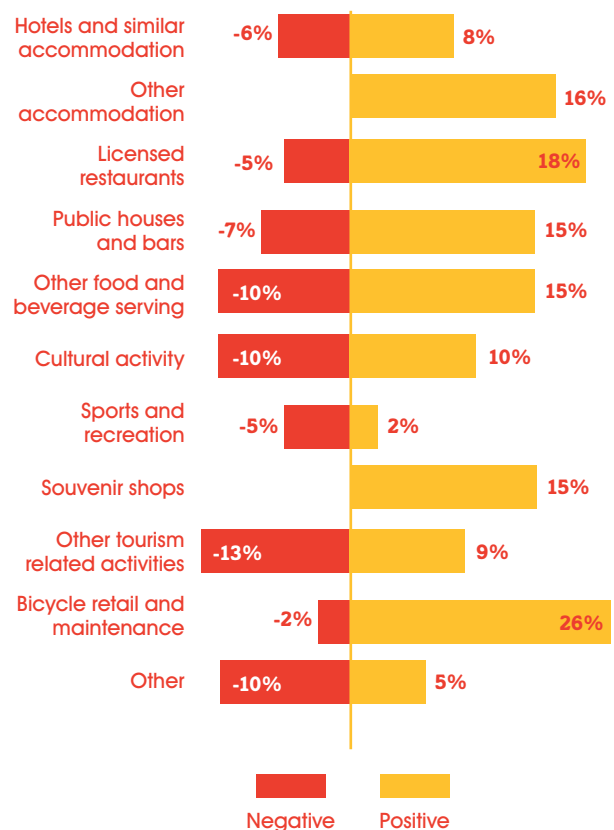
Figure 12: % of local businesses that saw a positive or negative impact in sales and attribute this to the Tour de France (3 months before the event)



The week before the race

Overall, 5% of businesses reported higher than normal sales turnover in the week running up to the hosting of the UK stages. Cycling businesses reported the most positive impacts, followed by pubs, restaurants and accommodation providers. It is notable in this period that negative impacts were also increasingly seen.

Figure 13: Proportion of local businesses by sector who reported higher or lower sales in the week running up to event



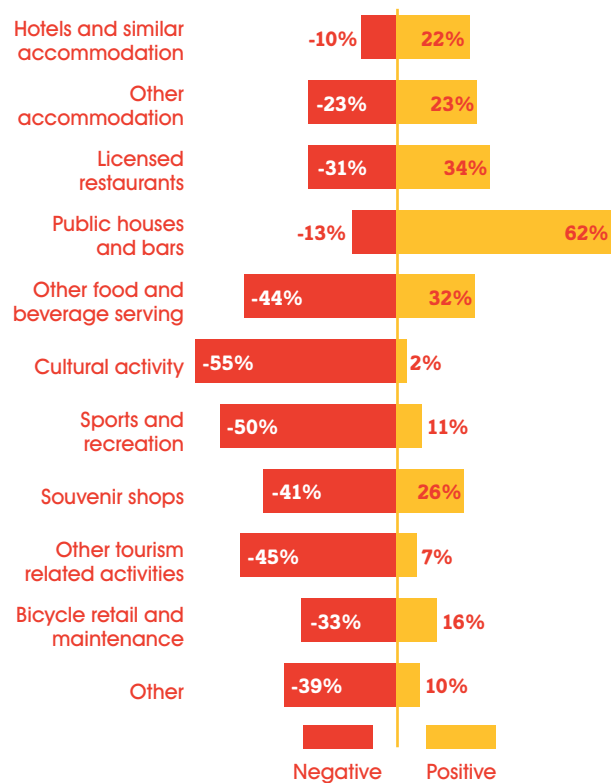
During the race

A significantly higher number of businesses said that the staging of the UK stages had an impact on their normal sales turnover on the race days – the proportion of business expressing a clear opinion on this increased to 54% of the sample.

Given the approach to the sampling of businesses close to each race stage, it was to be expected that many businesses would report a drop in sales on race days – the survey revealed that 10% of businesses reported that sales levels were lower than normal.

The sectoral variation in normal sales levels was at its most pronounced across the UK Stages with hotels, accommodation and bars/restaurants typically indicating that sales were much higher than normal (with most other visitor economy businesses reporting that sales were lower than normal).

Figure 14: Sectoral distribution of sales impact during the UK Stages



Visit York and the Visit York Information Centre (VIC)

Visit York and the Visit York Information Centre (VIC) worked to generate interest in York and Yorkshire for cycle tourism. The VIC opened at 7am on Sunday 6th July, 3 hours earlier than a normal Sunday. In total there were 3,510 customers through the doors, just short of their busiest ever day and a huge 179% higher than the first Sunday in July 2013. The VIC staff sold £24,923 of merchandise in the week beginning 30th June 2014, exceeding their target by 98% and taking £10,000 more than the same week in 2013. The VIC have been told anecdotally that businesses are seeing an increased interest in bookings from France as a result of the TV coverage.

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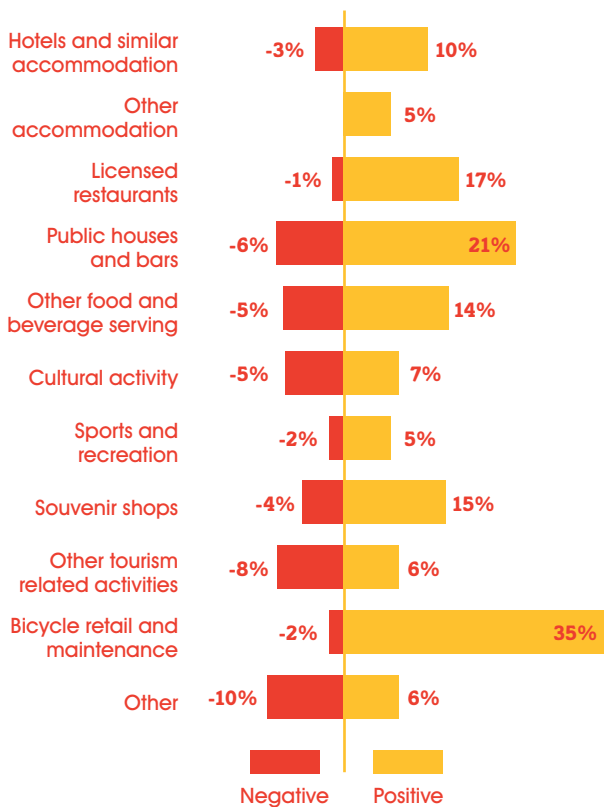


One week after the race

The reported sales patterns one week after the event reveal a different perspective from businesses. They reflect the fact that businesses were better able to digest and set in context the effect of the event in the week before the race on their sales, balanced against any reported drop in sales during the event – so in broad net terms, business views on the impact on sales in the week after the event present a more rounded commercial view.

The sectoral distribution of reported impacts on normal sales turnover levels was more consistent with the pattern seen in the week running up to the event, although the overall impact in some sectors was much higher (cycling businesses were twice as likely to report that their normal sales levels were higher in the week after the event compared with the week before the event).

Figure 15: Sectoral distribution of local business sales impact one week after the event

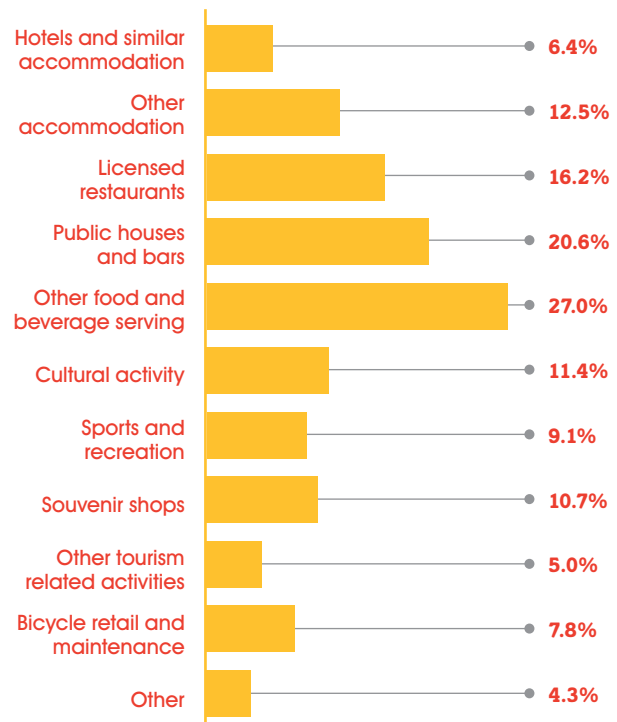


Temporary employment impact:

The survey of businesses also explored the extent to which temporary employment was created in the week before and across the race. The survey revealed that 11% of businesses reported that their employment levels were higher than normal, with 89% of businesses reporting that employment levels were unchanged.

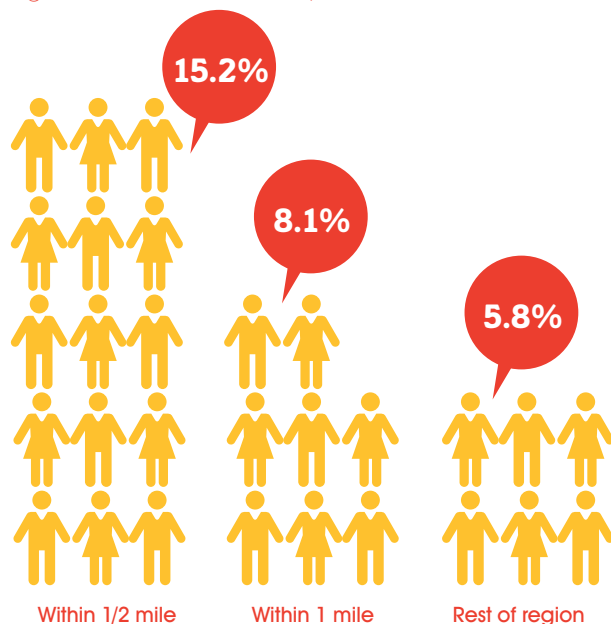
The temporary employment boost was most visible in the hospitality sector where proportionately more businesses in the Yorkshire stages of the race in these sectors reported that employment levels were higher than normal. Figure 16 below summarises the key data by sector.

Figure 16: Temporary employment impact by sector



A key consideration throughout is the proximity to the route, although this may be both a positive and a negative depending on the nature of the business. Figure 17 shows that the majority of the temporary employment was in establishments close to the route and, as set out previously, was primarily about serving food and drink.

Figure 17: Jobs created by distance from the route



Conclusions on economic impacts

This section has set out the economic impacts of hosting the Tour de France in Yorkshire and in York in particular. While these figures are positive, it should be recognised they are conservative estimates undertaken at a particular point in time. Longer term impacts, including those that are less easy to quantify and those that might occur later through future visitors and inward investment as a result of the Tour, are yet to be seen. As a result, the ultimate economic footprint is likely to be significantly higher.

It was clear from both the economic impact data and the business survey that the sectors that benefit most are those most obviously associated with the event including:

- accommodation providers including hotels, bed and breakfasts and campsites;
- restaurants, pubs, shops and local events selling food and drink;
- souvenir and clothing shops, as well as others in the visitor economy;
- cycling shops;
- transport providers; and
- suppliers to event organisers.

While other businesses did less well directly, most reported a fairly neutral position over the period, even if there was disruption on race days. Some businesses clearly had to change their usual business operations but while there were some negative impacts, most believe that the event was good for the host regions overall, and that disruption could be managed. Proximity to the route was positive for visitor economy sectors, though perhaps less positive in other sectors, especially while the event was taking place.

On balance, a clear economic boost was seen as result of the event and the supporting events leading up to it.

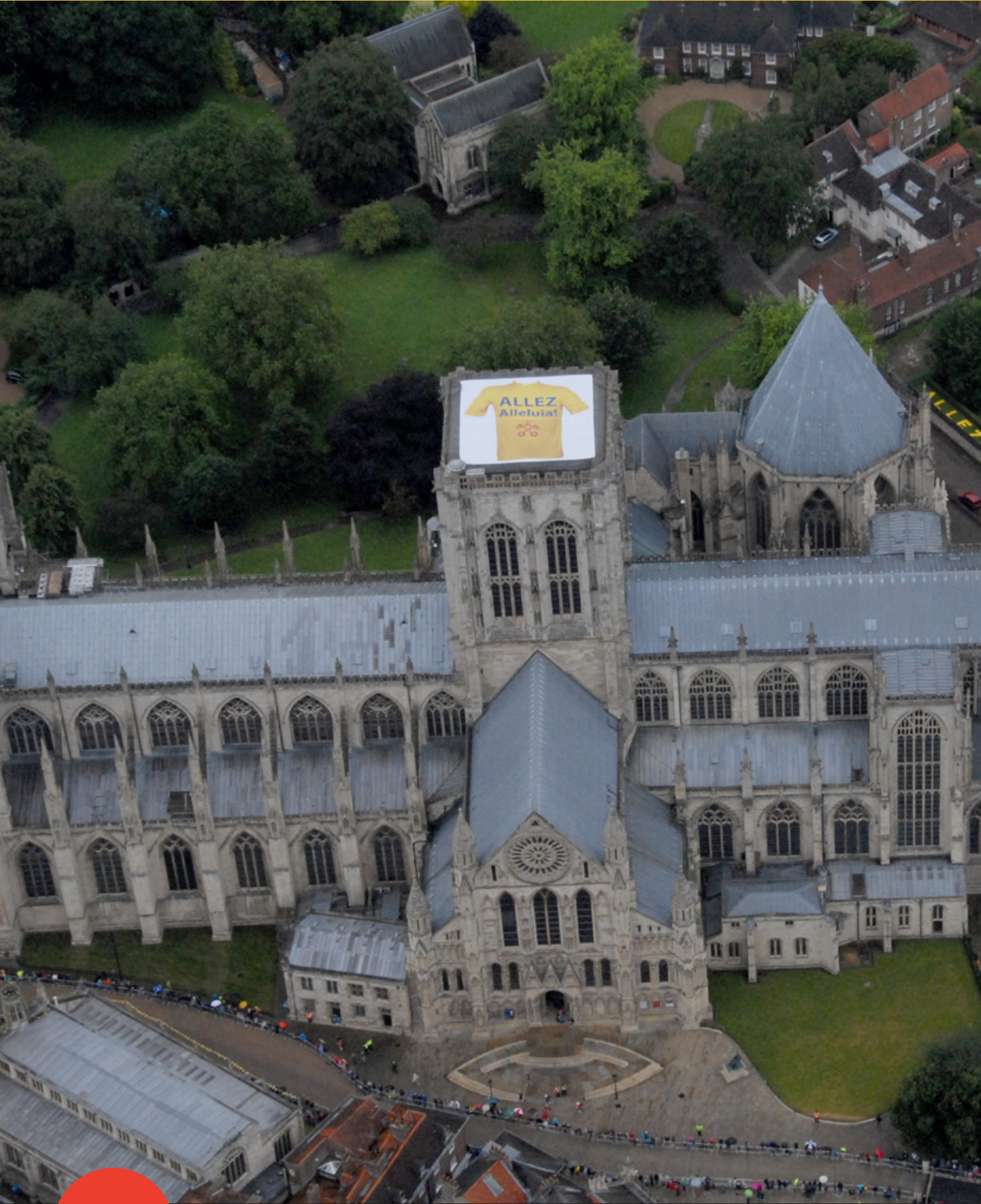
The People's Tour



National Railway Museum

"At the National Railway Museum, we didn't know what to expect from the Tour and over the weekend our visitor numbers were about 25% lower than a normal July weekend. However the Monday to Friday before the Grand Départ exceeded our budget by almost a quarter, our benefit was either side of the weekend."

Tim Neal, Senior Visitor Insight Executive



A sport for all: inspiring more people to ride more often

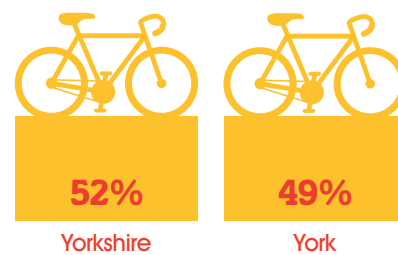
The three UK stages of the Tour de France proved that cycling is for everyone. The Tour inspired people to have a go, from adapted bike sessions to cycling lessons in school and charity bike rides for keen amateurs. Interest and participation in cycling has never been so high. This is particularly positive for York as the Council is the lead local authority for the Cycle Yorkshire initiative.

Inspiring people to cycle and be more active was a key reason for wanting to stage the event and it is clear from the evidence in the surveys that there has been a significant inspirational effect. For example, 63% of spectators felt inspired to take part in sport more often than they normally do as a result of watching the race, especially younger people (aged 16-24), 72% of whom were inspired to get more active. Over 80% of these inspired individuals (1.8 million people) said they felt inspired to cycle more frequently.

Of the UK adult population, 27% said they felt inspired to cycle more (this is equivalent to 14 million people – so some caution is needed here in interpreting this result). The post-event survey shows as many as 30% of spectators have increased their levels of cycling, with all of the associated benefits that this can bring. For those who were already regular cyclists (people who cycle once a week or more) 66% said that watching the race had a positive impact on their intention to cycle more. There was a similar effect on those who cycle less often, as 58% were inspired to cycle more. A quarter of those who had never cycled said they felt encouraged to cycle.

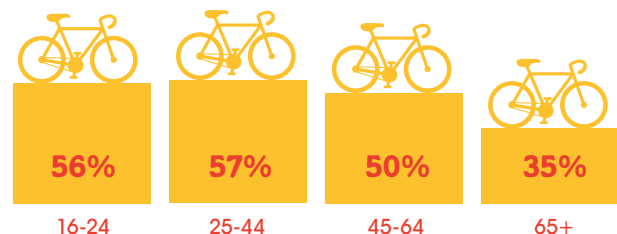
Almost half of spectators in York – more than 80,000 people – said they were inspired to cycle more as a result of the Tour de France.

Figure 18: Inspired to cycle more frequently



Attendance at the Tour had a stronger effect on the younger age group than the older age groups with 56% of 16-24 year olds being inspired to cycle more, compared to, for example, 14% of those aged 65+.

Figure 19: Impact of attendance on inspiration to cycle by age



Post-event take-up of cycling

Three months after the Tour de France, spectators who were happy to be contacted again were asked about their take up of cycling since the event. This showed that 28% of spectators were cycling more often, with 2% of spectators having taken up cycling for the first time since the event. Taking account of the relatively small sample size (n=300), the initial indications are that at least 750,000 spectators have cycled more frequently since the race.

Half of spectators who wanted to cycle more reported that their enthusiasm inspired others to cycle or to cycle more than they did before, particularly their partners, children and friends. People also reported that the event had encouraged them to make cycling related purchases as 11% bought a bike for themselves and 8% had bought a bike for a friend or family member. This reinforces the expectation that there will be ongoing economic benefits from hosting the race, through increased cycling take-up.

Photo: Leeds City Council



Figure 20: Post-event cycling take up amongst spectators

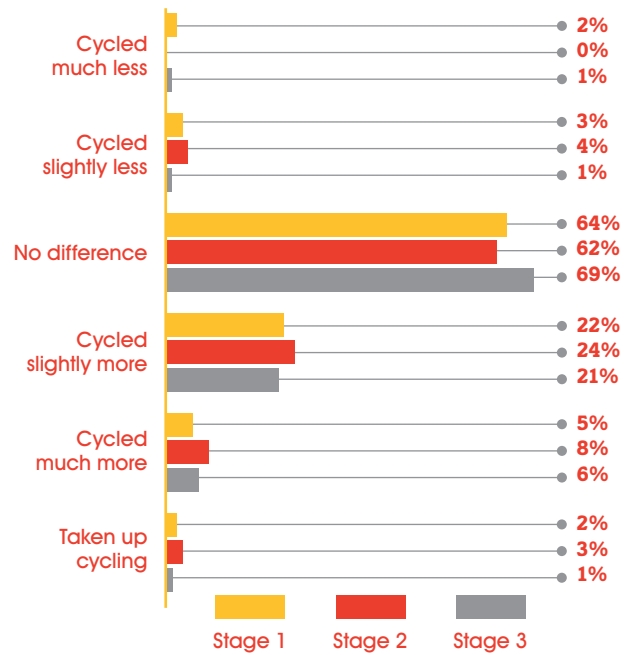


Figure 21: Spectators inspiring others to cycle more



Beyond the Tour – securing a cycling legacy

To secure a lasting cycling legacy from the Tour de France lots of organisations have been working hard to create opportunities to cycle and to improve cycling infrastructure.

In Yorkshire, there will be a Cycle Superhighway, linking Bradford and Leeds. A new velodrome is under construction in York and across Yorkshire the cycle lane network is being improved. In one example, North Yorkshire County Council successfully bid for £1.65m from the Local Sustainable Transport Fund to deliver upgraded cycle parking spaces and crossing improvements.

In addition, the Cycle Yorkshire initiative has brought together and galvanised 21 local authorities, Welcome to Yorkshire, British Cycling and Sustrans to form an agreed strategy to develop cycling and opportunities to get more people cycling more often. York city council was the lead local authority for this initiative. The five core objectives for the next ten years are to:

- get more people cycling – provide adults and children with greater training and access to cycling;

- make choosing cycling easier – work closely with local authorities, businesses and partners to improve cycling infrastructure and facilities to address both real and perceived barriers to cycling;
- more events to see and take part in – broaden the number and awareness of cycling events and opportunities for people of all generations and abilities to get involved;
- greater awareness of cycling and cyclists – create campaigns and events to generate a wider appreciation of the benefits of cycling, travel planning, bike safety, cycle friendly routes and respect between everyone using our roads; and
- a thriving network of cycling businesses and social enterprises – encourage and support all cycling related businesses in the region to provide a dedicated network of experts to sustain Yorkshire’s growing cycling community.

British Cycling (the national governing body for cycling) have also done a lot of work to ensure a lasting legacy of cycling participation as a result of the Tour de France. Their work and investment, in partnership with local authorities and others, has helped to grow the volume and accessibility of cycling opportunities in advance of the event and created the conditions for the anticipated growth in interest.

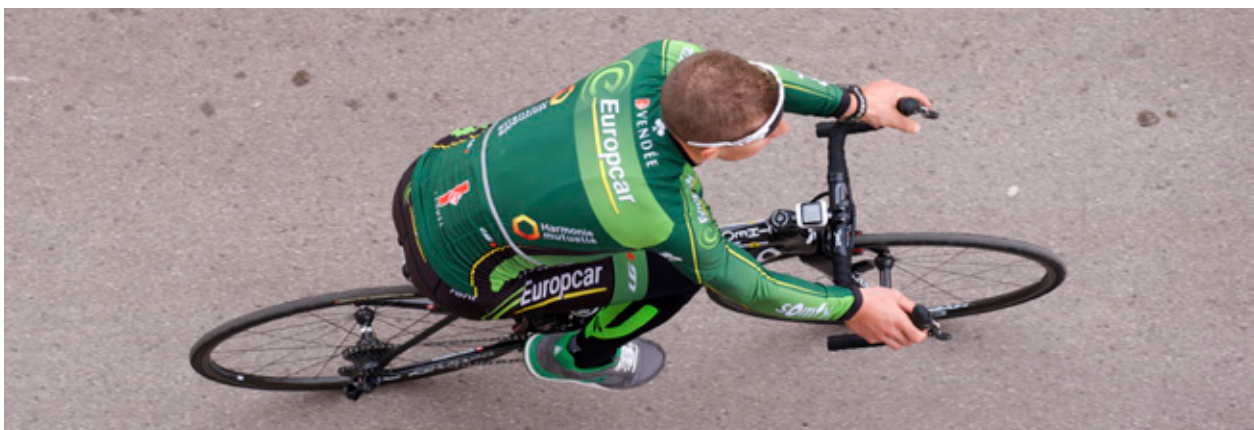


Photo: York Racecourse



Long term legacy: welcoming the world

The legacy of the Tour de France will continue after 2014 and well beyond, not least because the evidence shows that hosting the event successfully raised the profile of York and Yorkshire, and encouraged people to visit in the future.

Likelihood to revisit

Survey findings show that the image of Yorkshire overall, and of York have all been enhanced as a result of hosting the event and can expect increased visitor numbers as a result in future.

Of Stage 1 and 2 spectators from outside Yorkshire, 75% strongly agreed they would be more likely to recommend Yorkshire to friends and family. Of the same group, 72% said their image of Yorkshire had been enhanced and that 66% would be more likely to visit Yorkshire for a short break or holiday.

76% of visitors to York said they were more likely to recommend Yorkshire to family and friends, 68% said they were more likely to visit Yorkshire for a short break or holiday and 59% said their image of Yorkshire had been enhanced. While the questionnaire asked about Yorkshire, the fact that these were spectators in York suggests that the city is likely to see an increase in visitors in future.

Figure 22: More likely to recommend host regions to family and friends

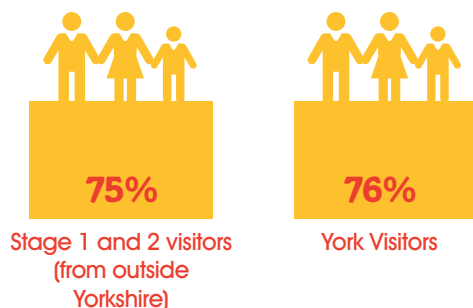


Figure 23: More likely to visit Yorkshire for a short break or holiday

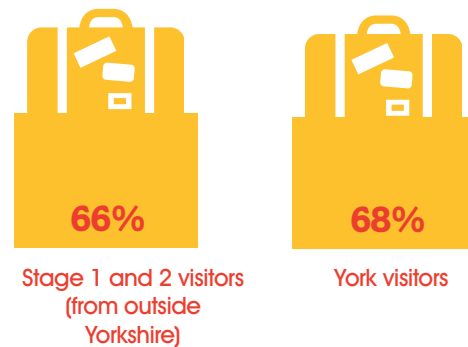
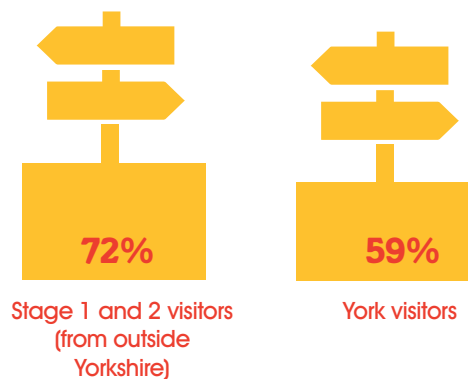
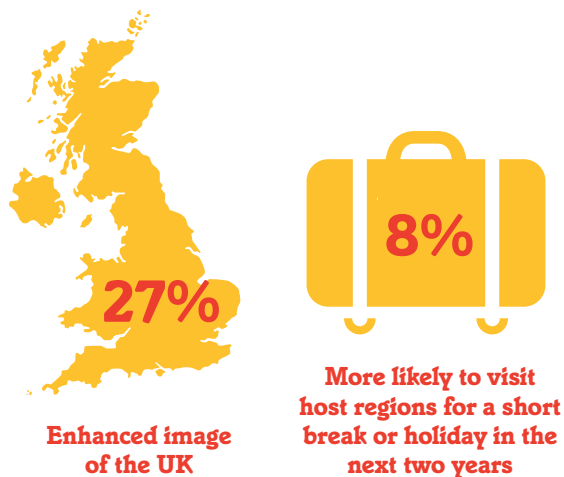


Figure 24: Enhanced my image of the host regions as a tourist destination



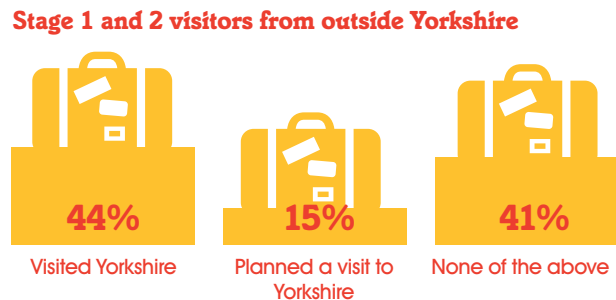
Of the National Omnibus survey respondents, 27% said that they strongly agreed that the image of the UK overall and the areas that hosted the Tour have been enhanced. The equivalent of 4 million people (8% of respondents) said they were more likely to visit these areas.

Figure 25: Enhanced image of the host regions



The spectator follow-up survey suggested that repeat visits are already happening. In the three month period after the event, 44% of non-residents who visited to watch Stages 1 or 2 have visited Yorkshire again in the three month period following the event. This supports the view that the economic boost to the areas that hosted the Tour de France will continue to see the benefits in the future and not just in the short period before, during and after the race.

Figure 26: Visiting spectators revisiting host regions

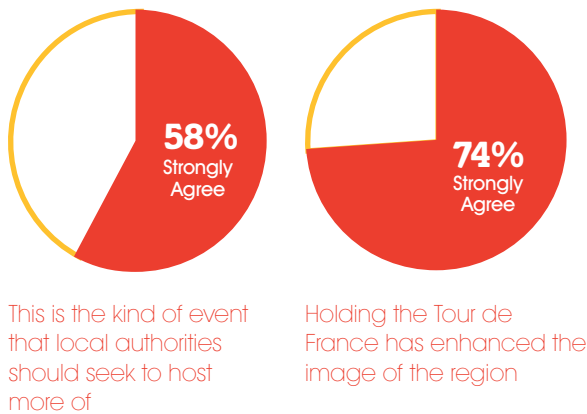


Businesses views on the future impacts of the event

As discussed earlier, while some local businesses were adversely affected, a large proportion agreed that the Tour was a good thing for their respective local areas. Nearly three quarters of businesses in Yorkshire (74%) strongly agreed that the image of the region had been enhanced. The survey showed that Yorkshire businesses were unanimous in thinking that the region had benefitted from hosting the Tour overall.

54% thought tourists would be more likely to visit Yorkshire for a short break or holiday as a result of the Tour de France.

Figure 27: Business perspectives on future impacts of the Tour de France





Appendix:

Methodology

The evaluation framework used in this study was designed to measure the social and economic impacts of the three UK Stages of the Tour de France 2014. We were guided by the nationally recognised, industry standard methodology developed by UK Sport - eventIMPACTS. In line with the eventIMPACTS framework, all the expenditure of attendees who were residents of a defined host region was excluded, as was the expenditure of all 'casual' spectators - i.e. those for whom the event was not their main reason for being in the given area.

Because this was a unique event, on a large scale and with activities specifically designed to increase interest and engagement in the event, we have also looked at other information to help describe its impacts. We know that not all of these can be measured in numbers or pounds and pence – some things are more intangible but still very valuable.

An independent, specialist research agency (SPA Future Thinking) was commissioned to carry out the primary research, which included four surveys (outlined below).

Four surveys

1. A face to face survey of over 4,000 spectators was completed over the three days. Fifty interviewers were positioned along the route each day to ask questions about:
 - Where people live;
 - Whether they were aware the Tour was coming to the UK;
 - Where people watched the race – and whether they planned to watch in more than one location, or on more than one day;
 - How much money people spent on average during their trip (how many nights they stayed, in what accommodation, how much was spent on food and drink for example);
 - How many were in their group;
 - How people travelled to the event;
 - How often people cycled or were physically active
 - Whether the Tour would inspire them to cycle more or be more active; and
 - People were asked about their perception of the local area and whether they would recommend it to friends and family to visit.
2. The 8,000 volunteer Tour Makers were asked a similar series of questions to understand their experiences, spending patterns, perceptions of the local area and other impacts the Tour might have. Around 2,200 Tour Makers responded to this survey.
3. A survey of over 700 businesses across the three UK stages was carried out immediately following the event with a follow-up three months afterwards. Businesses in the visitor economy and cycling sector were targeted, particularly those near the routes, as they were the most likely to have felt an effect from the Tour. Businesses were asked about:
 - any impacts on their turnover both pre-, during and post-event;
 - whether they had done any specific marketing or promotion work associated with the Tour de France;
 - whether they had employed any additional staff specifically because of the Tour;
 - awareness of the Tour taking place;
 - the potential long-term impact to their business and to tourism in their area, the perception of their local area, and if they thought the event would inspire more people to cycle more often;
 - whether local authorities should stage similar events in the future; and
 - to get a balanced picture we also asked specifically

This sample size gave overall confidence intervals of +/- 1.53 for the three stages overall – this means that our results are reliable.

From this, 1,200 spectators who agreed were re-contacted three months after the event to ask whether they had cycled more, so we could see if people's behaviour had changed as a result. Around 300 people completed this follow-up survey.

about any negative, as well as positive impacts.

4. An online survey was undertaken a week after the event with a nationally representative sample of the UK adult (over the age of 16) population. This 'national omnibus survey' of 2,000 people was used to benchmark awareness of the event across the country, the inspiration to increase cycling participation and recognition of the host regions and likelihood to visit. The sample was also asked whether they had watched the race in person, which was used as a cross check of other spectator counts.

Other information sources

A project team then brought this together with 'wider' information. This included:

- a detailed assessment of the spending of the main delivery organisations (local authorities, Transport for London and TdFHUB2014 Ltd) and the impact on local supply chains;
- a detailed set of case studies which were collected to show the range of experiences of the Tour. These included stories from local businesses, schools and community groups that described special activities or events that were put on to celebrate the Tour. The team collected nearly 300 in total, 29 of these are reproduced in this report;
- the evaluation of the Yorkshire Festival conducted by &Co Cultural Marketing;
- information and research from a range of partners, including the local authorities, National Park Authorities, Transport for London, TdFHUB2014 Ltd., METRO, British Cycling and Cycle Yorkshire; and
- trends from social media, such as Facebook and Twitter to shine a light on what people were saying about the Tour – including the riders themselves.

The framework we have used for this study therefore allows us to look at both the economic impacts of the Tour and the social and inspirational impact it had on people.



Photo: York Racecourse



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