

## *It's how you play the game*

Matching a region's priorities with the right mega—or not so mega—event

April 2014



*The appeal of marquee sports mega-events such as the Olympics and football's FIFA World Cup™ is undeniable. Cities the world over jockey to host these high-profile events, undeterred by the substantial costs, extensive planning, and inflexible timelines.*

What motivates the fierce competition to host these events? Are the risks worth the rewards? In fact, these marquee global events do possess inherently singular features that are not easily replicated:

- Their attendant deadlines mandate discipline and commitment.
- They offer rare opportunities for positioning in the spotlight of intense media attention.
- They necessitate collaboration between the various levels of government.
- They require the public and private sectors to cooperate.
- They mobilize national pride toward a common goal.
- They celebrate human achievement.<sup>1</sup>

However, not every city or region is ready or able to host a marquee mega-event. Smaller cities and regions may not have the resources, the infrastructure, or the capacity. Hosting the Olympics, for example, requires more than 30 competition venues and 90 training sites as well as housing for some 15,000 athletes, not to mention 40,000 hotel rooms as well as transportation, logistics, telecommunications, and entertainment facilities.<sup>2</sup>

### ***Assess long-term priorities***

Instead, cities and regions are better served by assessing their long-term priorities for development and then bidding on the events that best correlate with those priorities. Smaller scale events—mega in their own right—range from the Commonwealth Games and the Rugby World Cup to the Universiade (World University Games) and Formula One™ racing.

Hosting one of these smaller scale events fulfills similar objectives by converging public, private, and community support around the event; establishing clear deadlines that galvanize action; serving as a springboard for new infrastructure that will last well into the future; and shining the spotlight of national or international attention on a host city or region.

Proprietary PwC analysis indicates that evaluating a city's or region's assets and priorities is the first step toward determining which type of event it is best suited to host. We have created a framework (see page 2) that allows cities and regions to assess their strengths and weaknesses, then match their objectives for long-term development with the criteria required to host a particular event.

### ***Hierarchy of city needs***

PwC analysis illustrates that this kind of assessment can be compared to Maslow's hierarchy of needs, a theory introduced by psychologist Abraham Maslow in 1943 which posits that human beings must first fulfill basic physiological needs such as food and water before they move on to higher levels of self-actualization encompassing morality and creativity.

In our analysis, a similar type of hierarchy applies to cities and their needs. A city must first fulfill basic requirements for its residents before moving up the hierarchy. For more on this analysis, see page 2. In the realm of mega-events, cities are best served by focusing on the event that best fulfills their objectives, depending on where they are on the development continuum.

The United Nations cites five fundamental factors essential to a prosperous city: productivity, infrastructure development, quality of life, equity and social inclusion, and environmental sustainability.<sup>3</sup>

To capture attention on the world stage, PwC research has found that a city or region should excel in four essential dimensions: quality services to residents and businesses, sustainable development, visionary leadership, and consistency of image. Cities and regions already poised to achieve transformation in these dimensions are best suited to use an event such as the Olympics to accelerate that transformation.

Rio de Janeiro offers an excellent example of the transformation resulting from the vast preparation required to host a mega-event, ranging from security to transportation to urban regeneration. In the case of Brazil, that's two mega-events almost back-to-back, with football's 2014 FIFA World Cup™ followed by the Summer Olympics in 2016.

While rapid development, massive investment, and media spotlight can sometimes highlight issues that cause concern for organizing committees, ultimately, mega-events can be a force for positive change when they are organized effectively.

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# Playing to win

How does a city or region decide which event to host?

Matching regional priorities with the right event

Overall readiness	Venue/s	Legacy	Supporting infrastructure	Intellectual capital
				
<p><i>What are the city's or region's top 3 to 5 <b>objectives</b> in hosting this event?</i></p> <p><i>What are the top 3 to 5 main <b>advantages</b> this particular city or region has to offer as a host city, region, or country?</i></p> <p><i>Why is <b>now</b> a good time to embark on this initiative?</i></p> <p><i>What <b>metrics</b> will city or regional officials use to measure success?</i></p>	<p>Does the city or region possess the venues and facilities required to host a sports event of scale, be it the Olympics, the Commonwealth Games or the Universiade?</p> <ul style="list-style-type: none"> <li>• If not, would city and state (and in some cases national government) officials be willing to invest in such an undertaking?</li> <li>• How best could financing be handled?</li> <li>• What role would public-private partnerships play in this undertaking?</li> <li>• How likely would the business community be to support this initiative? What incentives would they need to get on board?</li> <li>• How likely would the local and regional communities be to support such an initiative? What kind of public opinion effort would it take to get them on board?</li> </ul>	<p>What type of legacy is the city or region seeking from this event?</p> <ul style="list-style-type: none"> <li>• If raising the national or international profile of the city or region is the objective, how will this event achieve that objective?</li> <li>• What kind of long-term development goals is the city or region seeking to accomplish with this event?</li> <li>• How best can the city or region plan ahead to ensure that the facilities and supporting infrastructure can be used beyond the event?</li> <li>• What modifications will have to be made to the stadia, housing facilities, and other infrastructure to ensure that they can successfully evolve from event-based to long-term use?</li> <li>• What legacy of sports is the city or region seeking to deliver to the community from this event?</li> <li>• What legacy of intellectual capital can the city or region leverage for future events from having planned, financed, built infrastructure for, and hosted this event?</li> <li>• What metrics will the city or region use to measure the success of its legacy?</li> </ul>	<p>Does the city or region possess the supporting infrastructure—transportation, temporary housing, utilities, sanitation, telecommunications—required to host an event of the scale under consideration?</p> <ul style="list-style-type: none"> <li>• If not, would city and state (and in some cases national government) officials be willing to invest in making the required improvements?</li> <li>• How closely would these improvements reflect the city's or region's long-term development plan?</li> <li>• How best could the event serve as a catalyst for accelerating the city's or region's longterm plan that's already in place?</li> <li>• How likely would the business community be to support the construction of supporting infrastructure? What role would public-private partnerships play in this undertaking?</li> <li>• How likely would the local and regional communities be to support such infrastructure improvements? What kind of public opinion effort would it take to get them on board?</li> </ul>	<p>Does the city or region possess the intellectual capital to plan, finance, build for, and host an event of this scale?</p> <ul style="list-style-type: none"> <li>• Has the city or region attempted to host an event of this scale before?</li> <li>• If that bid was successful, what can be duplicated from that effort?</li> <li>• If not, what lessons can that attempt offer?</li> <li>• What kind of external advisors would the city or region need to call upon to plan, finance, build, and host an event of this scale?</li> </ul>

Source: PwC analysis

### **Barcelona provides seminal template**

The historical role of a mega-event in urban transformation—accompanied by an enduring boost in property values—is well documented, back to Rome in 1960, which developed a new water supply system, new hotels, improved transportation, and urban landscaping for the Olympics.<sup>4</sup>

Barcelona continues to provide the seminal template for how a city was able to redefine itself within the space of a generation. According to Stephen Essex, associate professor at the UK's University of Plymouth who researches infrastructure implications of the Olympic Games, the 1992 Olympics “simply speeded up the renewal that had already been planned to take place over 50 years” in keeping with the region's 1976 General Metropolitan Plan of Barcelona.<sup>5</sup>

Essex says organizers had already “mobilized public support through neighborhood projects that had established a consensus for change.” Meanwhile, existing facilities with planned upgrades served as many of the main Olympic venues. And public sector support was substantial, Essex says, impelled by the end of the Franco period as well as an upsurge in regional identity.<sup>6</sup>

Infrastructure projects, which accounted for 83 percent of the total budget for the Barcelona Olympics, transformed urban innovation in the city.<sup>7</sup> In turn, that urban innovation led to corporate innovation, and further along the spectrum, to social innovation as laid out in PwC's urban infrastructure evolution on page 11.

### **World-class transformation**

For the 1964 Olympics, Tokyo spent 3.6 percent of its Gross National Product on urban renovation, including harbor expansion, housing, sanitation, tourist facilities, and a massive transportation network.<sup>8,9</sup>

That transportation network included eight new expressways, 45 miles of subway, 8 miles of monorail, and a

*The historical role of a mega-event in urban transformation — accompanied by an enduring boost in property values — is well documented.*

300-mile Shinkansen high-speed train—sometimes referred to as a bullet train—connecting Tokyo, Kyoto, and Osaka.<sup>10</sup>

In fact, more than 95 percent of the Olympic budget contributed to this long-term development, transforming the city into a modern, prosperous metropolis after the war.<sup>11</sup> Today, Tokyo ranks among the world's top 5 cities for the quality of and access to its transportation and infrastructure, according to PwC's *Cities of Opportunity*, a survey of world-class cities.<sup>12</sup>

Conversely, in 1976, Montreal spent only 13 percent of its budget—originally estimated at \$310 million but with a final tab of close to \$1.5 billion that took some 30 years to pay off—on long-term, non-venue related development.<sup>13</sup>



## Early, ongoing, diligent planning results in Olympic legacy for East London

A reinvigorated East London—a previously economically underdeveloped area of the city—is part of the legacy of the 2012 Olympic and Paralympic Games. Almost £12 billion worth of construction activity related to the Games began in 2005 and will continue until 2017, part of the long-term vision for the revitalization of East London.<sup>1</sup>

The Games serve to crystallize London's position as an established global destination for finance, culture, tourism, and trade, while showcasing what would become one of the biggest new city center parks in Europe, post-Games—Queen Elizabeth Olympic Park—on an accelerated timeline that might otherwise have taken several decades.<sup>2,3</sup>

In fact, London began its legacy planning from the very beginning: the bid phase. Planning for the legacy that far ahead is one of the most substantial changes in approach to the concept and reality of legacy within the modern Games.<sup>4</sup>

### Legacy is not a given

A very real acknowledgement now exists that legacy doesn't just accrue to a host city or region automatically post-Games. It should be part of the process during the original bid, post-selection, implementation, and post-Games for a host city or region to realize the actual potential of the legacy, as illustrated on the following page.

Oxford Economics and the Lloyds Banking Group estimate that London's 2012 Olympics and Paralympics will contribute more than £16.5 billion in revenue to the UK GDP over a 12-year duration.<sup>5</sup> The organizing committee for the London Games employed 7,000 staff and 100,000 contractors. And some 70,000 volunteers were essential to the success of the Games.<sup>6</sup>

In the wake of the intellectual capital accumulated during their work on London's 2012 Olympic and Paralympic Games, UK companies won £120 million of contracts from Brazil's 2014 FIFA World Cup™ and the Rio 2016 Olympic and Paralympic Games as well as more than 60 contracts for the Sochi 2014 Olympic and Paralympic Winter Games and Russia's 2018 FIFA World Cup™ within a year after hosting the Games.<sup>7</sup>

### Thriving population center

Post-Games, the site of the 560-acre Olympic Park was charged with ambitious goals: Evolve from a venue where several million domestic and overseas visitors attended a major global event to become—concurrently—a local amenity, a London-wide attraction, and a national landmark.<sup>8</sup> It was partially reopened to the public in mid-2013; the rest of the park is scheduled to reopen in mid- 2014.

With more than 10 substantial transportation links, five new neighborhoods, a new retail shopping area, and extensive commercial development—some of which is still under completion—Stratford, the site

of Queen Elizabeth Olympic Park, is poised to become a thriving new population center.<sup>9</sup>

In a post-Games report, the UK's National Audit Office concluded, “By any reasonable measure, the Games were a success and the big picture is that they have delivered value for money.”<sup>10</sup>

A review conducted by the Organization for Economic Cooperation and Development ahead of the London Games found that:

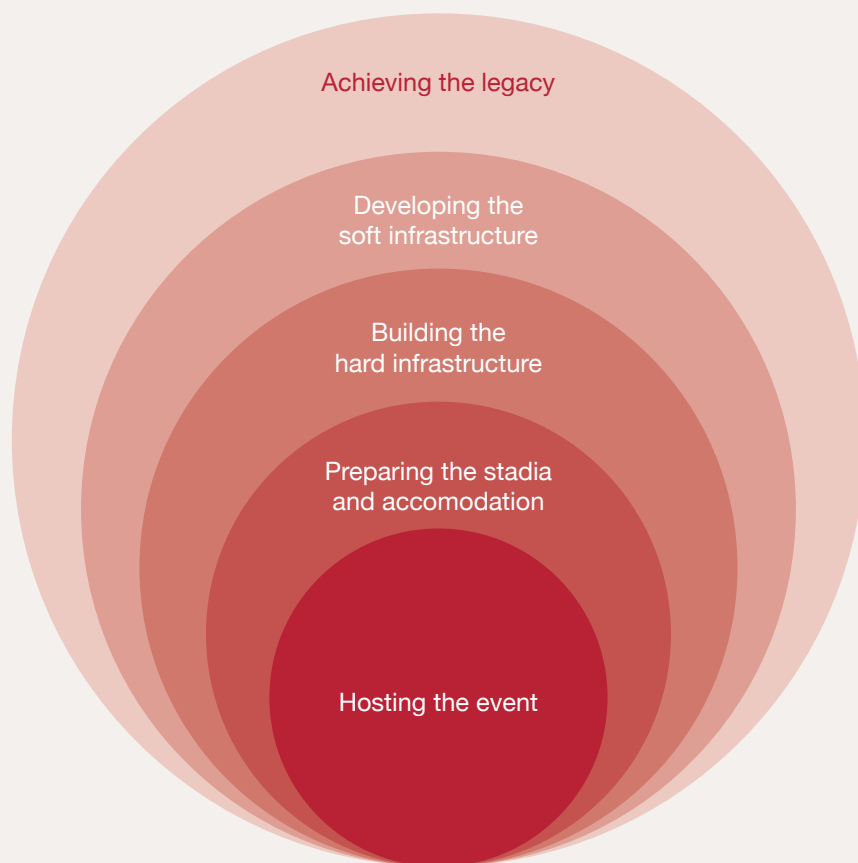
- The wider benefits of hosting the Games begin ahead of the actual event and can last for years to come in phases.
- Some of the benefits and wider legacy will only occur if the event itself is perceived to have been a success, which requires building confidence and momentum well ahead of the Games to secure the wider legacy and attract external investment.
- Legacy is not an automatic benefit of the Games; investment in a legacy—both before and after the Games—is essential to secure it.
- Dedicated legacy arrangements, separate from the needs of hosting the Games, are central to achieving an optimal legacy.
- The legacy will manifest differently in various locations, with distinctive processes for each. The processes

for land and property markets in inner East London will be separate from labor market development and strengthening of supply chains over a more diffused area. Meanwhile, other legacy processes will focus on positioning activities for London and its wider surrounding areas.<sup>11</sup>

London Mayor Boris Johnson, who a few years before the Games was unconvinced about their potential to spur the development of East London, agreed. He said after they ended in August 2012, "We can secure a transport, housing, infrastructure, sporting, cultural, and social legacy

from these Games and turn these Games to gold for decades to come."<sup>12,13</sup>

### Legacy planning permeates every phase



Source: PwC analysis

1. Oxford Economics and Lloyds Banking Group, *The Economic Impact of the London 2012 Olympic and Paralympic Games*, July 2012.
2. Jon Coaffee, "Urban Regeneration and Renewal," *Olympic Cities: City Agendas, Planning, and the World's Games, 1896-2012*, edited by John R. Gold and Margaret M. Gold, 2007.
3. Cathy Newman, "Olympic Games: Legacy or Money Pit?," *National Geographic*, February 21, 2014.
4. Becca Leopkey and Milena M. Parent, "Olympic Games Legacy: From General Benefits to Sustainable Long-Term Legacy," *The International Journal of the History of Sport*, April 2012.
5. Oxford Economics and Lloyds Banking Group, *The Economic Impact of the London 2012 Olympic and Paralympic Games*, July 2012.
6. "The Joy of the Nudge Olympics," *The Economist*, August 11, 2012.
7. HM Government and Mayor of London, *Inspired by 2012: The Legacy From the London 2012 Olympic and Paralympic Games*, July 2013.
8. Owen Gibson, "London's 2012 Legacy," *The Guardian*, February 11, 2013.
9. Shaun McCarthy and Emma Synnott, "Regeneration and the Role of the London 2012 Olympic and Paralympic Games," *Journal of Urban Regeneration and Renewal*, 2012.
10. National Audit Office (UK), *The London 2012 Olympic Games and Paralympic Games: Post-Games Review*, September 2012.
11. Organization for Economic Cooperation and Development, *Local Development Benefits from Staging Global Events: Achieving the Local Development Legacy from 2012*, 2010.
12. Allister Hayman, "Johnson Unconvinced by 2012 Renewal Legacy," *Regeneration & Renewal*, June 20, 2008.
13. "Boris Johnson: London's Olympic Legacy 'Must Harness Team GB Momentum,'" *Telegraph*, August 9, 2012.



### ***Long-term vision for development***

These examples illustrate that successful development and redevelopment related to mega-events can only occur when linked to a long-term vision that considers each project and the attendant land use, then mobilizes resources accordingly.<sup>14</sup>

Thomas Bach, president of the International Olympic Committee, said the committee is going to ask candidate cities to spell out how the Games correspond with each city's long-term development and sustainability plans and define the context of their social and cultural milieus, thus allowing for more creativity and diversity from candidate cities.<sup>15</sup>

Cities and regions have increasingly begun to recognize that legacy design and planning should be major components of their bidding and hosting process: They must align the scope and dimensions of the event with their own long-term development plans. Only then can they identify which long-term goals the event itself can accelerate progress toward.<sup>16</sup>

Goals such as international prestige: In a measure of a city's position as a "global gateway" to connections and attraction beyond its own local borders, Beijing—in third place—trumped New York, which is hampered by poor airport to central business district access, according to PwC's *Cities of Opportunity*.<sup>17</sup>



Some 4.7 billion viewers worldwide, the largest global audience to date, tuned in to some portion of the Olympics when Beijing hosted in 2008.<sup>18</sup> The event served to cement China's position as a global powerhouse capable of hosting a top-tier mega-event.

### ***A time to shine***

Today, emerging market mega-event hosts have been known to leverage the event to draw attention on the world stage—sometimes described as a “coming-out” party. They view mega-events as an opportunity to showcase their economic development

Much of China's \$42 billion Olympic budget for the 2008 Summer Olympics can be attributed to infrastructure spending on a new airport with vastly improved capacity, mass transit that expanded access from a two-line subway into the world's largest network, and other citywide improvements. Until the Olympics, Beijing's urban infrastructure significantly lagged comparable cities in advanced economies.<sup>21</sup>

### ***Accelerating economic growth***

According to the World Economic Forum, every dollar spent on public infrastructure results in an increase in GDP between 5

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## ***The 2008 Olympics and Paralympics served to cement China's position as a global powerhouse capable of hosting a top-tier mega-event.***

successes to the world as well as to attract future economic growth.<sup>19</sup>

As China did with the Summer Olympics and Paralympics in 2008, South Africa with football's 2010 FIFA World Cup™, India with the 2010 Commonwealth Games, Russia with the Sochi 2014 Olympic and Paralympic Winter Games, and Brazil with football's 2014 FIFA World Cup™ followed by the Summer Olympics in 2016.

The unrelenting deadlines in place for mega-events allow emerging markets to accelerate their long-term development by a decade or more, bringing with that acceleration the accompanying economic growth: Beijing ranked highest on a 2012 list of 27 global cities in a measure of economic clout beyond its own borders, according to PwC's *Cities of Opportunity*.<sup>20</sup>

cents and 25 cents.<sup>22</sup> Conversely, deficient infrastructure can raise the costs of doing business in urban areas and reduce productivity by as much as 40 percent.<sup>23</sup>

Kazan, Russia, host of the 2013 World Summer Universiade, compressed an entire decade of development—new roads, rail, airport terminal, and telecommunications infrastructure—into a few years for the city and the wider region.

Economic growth is among the reasons Russia is embarking on a new era of regional and global mega-events: After staging the 2012 Asia-Pacific Economic Conference, 2013 Universiade, and the Sochi 2014 Olympic and Paralympic Winter Games, the country also will host football's 2018 FIFA World Cup™ and several other global and regional sporting events—in aquatics, Formula One™ racing, ice hockey, and athletics.







## Universiade: Powerful accelerator for Kazan

Kazan, the eighth most populous city in Russia and the capital of the Republic of Tatarstan, hosted the 2013 Summer Universiade, an International multisport event organized for university athletes by the International University Sports Federation (FISU).

Home to some 200,000 university students from 67 countries, Kazan was always a natural candidate for the Universiade. Undeterred by its first losing bid for the 2011 Universiade, Kazan bid again in 2008 for the 2013 Universiade—and won this time.

National support from Russian Prime Minister Dmitry Medvedev helped win Kazan's bid. Said FISU Vice President Stefan Bergh, "It's very important that Kazan's bid to host the 2013 Summer Universiade is supported by the Prime Minister and by Tatarstan's leaders. In fact, the whole country is behind Kazan. I have a very positive impression of your city."<sup>1</sup>

Kazan hosted 13,000 athletes from 165 countries for the Universiade, drawing more than 150,000 visitors. Some 20,000 Russian and international volunteers supported the organization and execution of the Universiade. Many of them had gained experience from working at previous Universiades.

### Lessons from Kazan to Sochi

Kazan served as a learning experience for the Sochi 2014 Olympic and Paralympic Winter Games as officials have assessed what has worked well in Kazan and what didn't: everything from visas to transportation for visiting athletes to marketing.

Kazan will also host the Swimming Federation World Championships in 2015. Meanwhile, it is one of 10 Russian cities that will host football's 2018 FIFA World Cup™. To prepare for all these events, Kazan mounted a massive infrastructure initiative.

Overall, infrastructure spending is expected to account for 7 percent of Russia's growing GDP until 2018 as the national, regional, and local governments upgrade facilities and transportation for the Sochi 2014 Olympic and Paralympic Winter Games and 2018 World Cup Football™.<sup>2</sup>

### Powerful accelerator

Vladimir Leonov, former Head of the Executive Directorate for Kazan 2013, said the Universiade compressed an entire decade of development into a few years for the city of Kazan and the wider region, necessitating a variety of new road, rail, and telecommunications infrastructure within a very short timeframe. A new business-class terminal is now part of the airport complex, with another terminal slated for completion in time for the 2018 World Cup. Eventually, the upgraded airport will serve some 3 million passengers annually. A new rail-line connects the airport to the city center while high-speed rail now links Kazan to Moscow, some 450 miles west.

"Most of the facilities being built for the Universiade were already called for under the city's and region's long-term development strategy," Leonov said. "However, the Universiade has become a powerful accelerator for the overall development of the city and Tatarstan as a whole."

**13K**  
*athletes from 165 countries*

**150K**  
*visitors*

**20K**  
*Russian and international volunteers*

Leonov added, "A key component of Tatarstan's development strategy is to transform Kazan into a major hub for sports: Russia's 'sports capital.' Thanks to the accelerated pace at which sports facilities were built for the Universiade, Tatarstan already has what it takes to host major international sporting events, which can only help facilitate economic growth and an inflow of new investment."

1. Kazan 2013 Executive Directorate, Media Department.
2. Thomas Grove, "Russia's \$50 Billion Olympic Gamble," *Reuters News*, February 20, 2013.

Accelerated economic growth is also forecast for South Africa, host of football's 2010 FIFA World Cup™, which drew more than 100,000 visitors to the country and mobilized extensive road, airport, and rail upgrades—including South Africa's first new airfield in almost 100 years and a 50-mile high-speed rail line linking Johannesburg to Pretoria.<sup>24, 25</sup>

In preparation for its marquee World Cup bid, South Africa gleaned valuable intellectual capital lessons from two decades of hosting several smaller scale events in the 1990s and 2000s.

*The unrelenting deadlines in place for mega-events allow emerging markets to accelerate their long-term development by a decade or more.*

As with most successful mega-event hosts, South Africa's experience proves that capturing and replicating the lessons learned from each event is pivotal to success in the future.

### ***Learning by doing***

Previous events South Africa hosted include the 1995 Rugby World Cup, 1996 African Nations Cup (Soccer), 1996 World Cup of Golf, 1998 World Cup of Athletics, 2003 Cricket World Cup, The 2003 Presidents Cup (Golf), 2005–2008 Women's World Cup of Golf, 2006 Paralympic Swimming World Championships, 2007 World Twenty 20 Championships (Cricket), and 2009 FIFA Federations Cup™.<sup>26, 27</sup>

When a city or region successfully hosts a smaller scale event, that experience can serve as a springboard

to attract future events of a higher profile because that city or region is not an unknown quantity anymore.

### ***Permanent boost in trade***

In fact, the very act of bidding on a sports mega-event signals a region's intent to move toward a more open trade policy, which results in a *permanent* boost in trade, according to economists Mark Spiegel of the Federal Reserve Bank of San Francisco and Andrew Rose of the University of California, Berkeley. In a June 2011 report that analyzed 196 regions' economic performance between 1950 and 2006, Spiegel and Rose found that hosting a mega-event like the Olympics or FIFA World Cup™ permanently boosts trade by more than 20 percent. Moreover, even a losing bid triggers a similar effect on trade.<sup>28</sup>

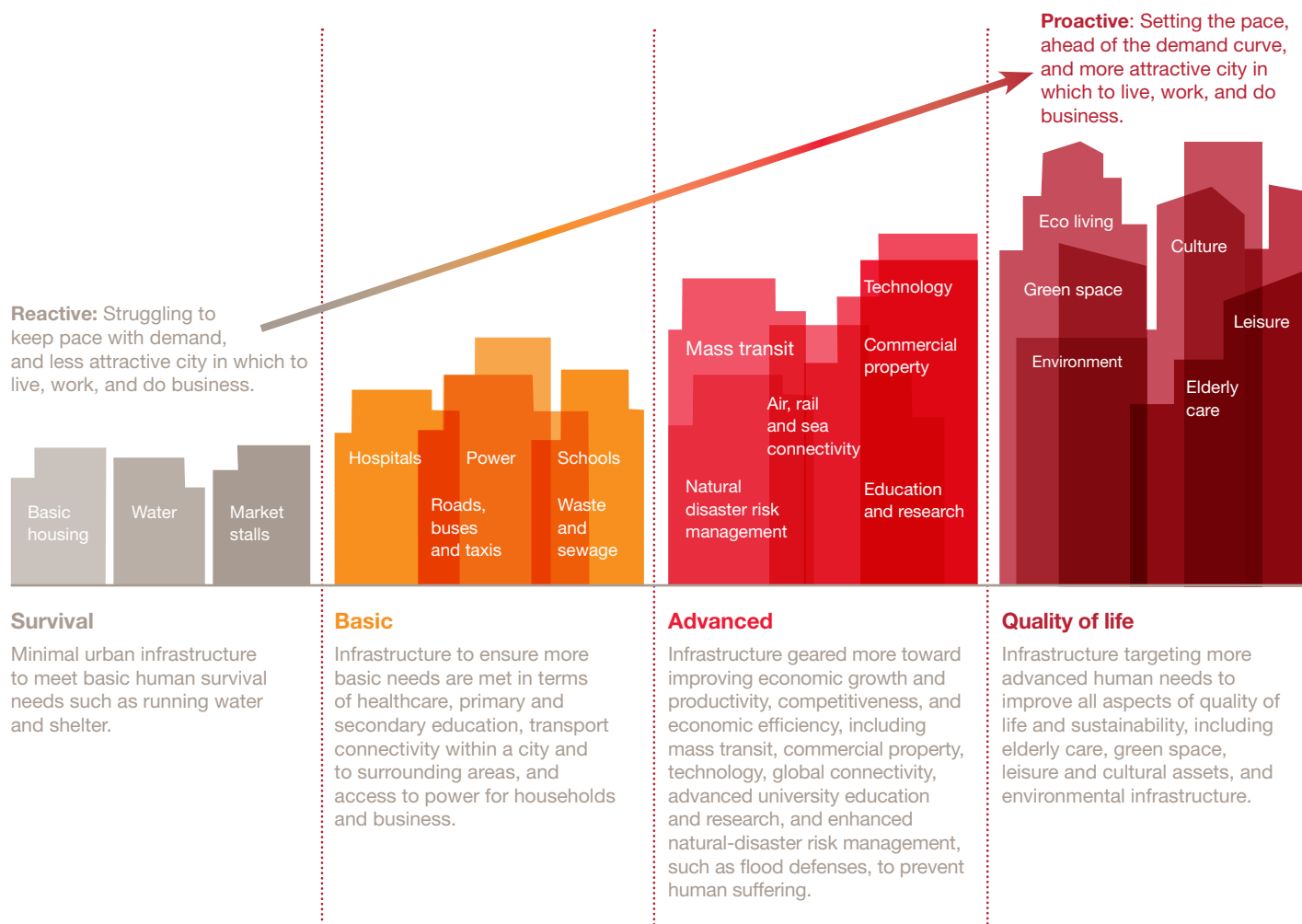
And serves as a fulcrum for development, as illustrated by New York City's bid for the 2012 Summer Olympics. Although London won that bid, New York embarked on a massive urban regeneration initiative initially spurred by its bid for the Games. New York's long-term plan focused on developing seven areas of the city via mass transit improvements, affordable housing, parks, recreational facilities, and commercial real estate—regardless of whether or not the city actually won its bid.<sup>29</sup>

The bid process provided the city with a framework to shape the future. Planning for the Olympics regenerated neighborhoods throughout New York City while serving as the impetus for new public and private investment in previously underused industrial corridors that had fallen into disrepair.



## Four-stage urban infrastructure evolution

Advancing along the infrastructure evolution necessitates long-term planning



Source: PwC, *Cities of Opportunity: Building the Future*, November 2013.

## A sleek win for San Francisco: The America's Cup

While the winner of each America's Cup decides the venue of the next international sailing contest, typically held every three to five years, the venues selected also have to prove they can host the event.

In the case of San Francisco—where the Bay is considered one of the world's best sailing venues, by all accounts—the city also had in place, or created, the requisite infrastructure for the event, the participants, and the fans. And the San Francisco Bay provided a natural stadium for spectators, framed in part by the Golden Gate Bridge.

The series of races in the summer of 2013 generated more than \$550 million in economic impact for the Bay Area, according to the Bay Area Council Economic Institute, a not-for-profit organization that conducts research and analysis for government and business in the region.

Other forms of legacy from the 34th America's Cup include accelerated infrastructure development, new standards for sustainability, and the experience to host other high-profile events going forward.<sup>1</sup>

### Global audience

The race drew more than 700,000 spectators, created close to 4,000 new jobs, generated \$6.7 million in tax revenues, and featured San Francisco in global television coverage to audiences in more than 200 countries.<sup>2</sup>

"It's definitely a platform to leverage the city's standing on the international stage," said Kyri McClellan, CEO of the America's Cup Organizing Committee, a not-for-profit group charged with fund-raising for the event. She added, "The planning and preparation to deliver community and legacy benefits has given city officials and leaders a level of expertise that will allow San Francisco to bid on other high-profile events like the Super Bowl and the Olympics in the future."

More realistic expectations will also prevail in bidding on and hosting future events as city and regional officials incorporate lessons learned from financial, infrastructure, and logistical challenges in hosting the America's Cup. Notably, in mid-2013, the Bay Area was selected to host Super Bowl L in 2016 (the 50th Super Bowl).

Preparations to host the America's Cup began in San Francisco almost two years before the races. Mark Buell, chairman of the America's Cup Organizing Committee, said bringing the race closer to shore—for the first time in the event's 162-year history so fans could see the action up close—presented several logistical challenges, which organizers worked to overcome. "San Francisco has never organized a Bay Area-wide event like this before," Buell said.

Stephen Barclay, CEO of the America's Cup Event Authority, which runs the event, concurred. He said bringing the

event to "within touching distance" of fans on shore has changed the dynamic of fan interaction.

### Hear them roar

"America's Cup sailing has never delivered an in-stadium experience for fans," he said, explaining that it has always been held three miles offshore in open water. But that made it difficult for fans to follow the races. Buell added, "Now the fans can get up close and personal with the action while the sailors can hear the roar of the fans."

According to the Office of the Mayor in San Francisco, the key legacies from having hosted the America's Cup include:

- **Transit**

The San Francisco Metropolitan Transportation Agency (SFMTA) successfully adapted to varying levels of spectator demand for transit during the America's Cup regattas. The SFMTA has since established an ongoing special events team to make moment-by-moment decisions on how best to deploy resources for large—and often concurrent—events in San Francisco.

- **Sustainability**

The Port of San Francisco adopted a zero-waste event policy in advance of the America's Cup, including banning single-service plastic bottles from waterfront events. This policy will ensure zero waste for all future events on port property.

*San Francisco has never organized a Bay Area-wide event like this before.*

—Mark Buell, Chairman, America's Cup Organizing Committee

In addition, the Port installed new shore-side power facilities at its dry-dock industrial complex to offset event-related air emissions, an ongoing benefit to residents of waterfront neighborhoods.

- **Legacy infrastructure**

Several public-access waterfront projects—completed in advance of the races—will benefit the community in the decades ahead. These projects include improvements at Fisherman's Wharf, Pier 43 Park, Piers 19 and 23, Marina Green, and Brannan Street Wharf. Pier 27, which served as one of the main spectator venues for the event, now serves as the city's cruise-ship terminal.

- **International standing**

The races were broadcast globally, raising the profile of San Francisco and confirming the city's reputation as an exciting travel and tourism destination.

In the wake of the success of the 2013 race, the City of San Francisco has already submitted its bid to host the 35th America's Cup, likely to be held in 2017.

1. Bay Area Council Economic Institute, *The Economic Impact of the 34th America's Cup in San Francisco*, December 2013.
2. Ibid.

The initiative required a coordinated effort by numerous civic and community groups, public and private organizations, and municipal agencies.<sup>30</sup>

Robert Baade, a professor of economics and business at Lake Forest College in the US, says coalescing community support around a mega-event is key because it can result in disparate political elements joining forces to support and implement infrastructure development, which would not occur in the absence of that mega-event.<sup>31</sup>

the continuum can help a city appraise its own long-term development goals and desired state of quality of life—then help match those goals with the appropriate mega—or not so—mega event.

As economies develop from low to middle to upper income, they move up the spectrum. At the far end of the spectrum, some struggle to keep pace with demand for amenities essential to human existence such as shelter and water supply.

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*Cities are using mega-events as a springboard to develop wider social agendas in keeping with a superior quality of life.*

### ***Unrelenting timeline***

New York City already had a comprehensive development plan in place; the city then used its Olympic bid process as a catalyst for development, one with an unrelenting timeline. Even after London won the Olympics bid in 2005, New York City continued to push ahead with urban regeneration, much of which will be completed within the next decade.<sup>32</sup>

Any serious bid for a mega-event forces a city to assess its own long-term goals and plan strategically for its future.<sup>33</sup> As Manchester did. Located in the second most populous region in the UK, after the Greater London area, Manchester hosted the Commonwealth Games in 2002. In doing so, the city was able to revitalize several economically disadvantaged neighborhoods and expand entry-level employment for the populations in those neighborhoods.<sup>34</sup>

In advance of a bid, a city can assess where it falls on PwC's quality of life continuum, depicted on page 11. Ranging from basic survival on one end to a superior quality of life on the other,

As income increases, basic infrastructure spending includes both individual and social needs from sanitation, hospitals, and clinics, to schools, power transmission, and rudimentary transportation. At higher income levels, increased spending encompasses sectors that lead to a modern city in its most sophisticated and comprehensive form.<sup>35</sup>

### ***Multiplier effect***

As wealth increases, a country is able to spend more on infrastructure. Not every country makes infrastructure spending a priority. However, those that do have benefited from the multiplier effect of infrastructure spending, which serves to further increase economic growth between 5 and 25 percent.<sup>36</sup>

The advanced stage of development encompasses advanced education and research; technology; mass transit, air, rail, and sea connectivity; commercial property such as offices and business parks; and natural-disaster infrastructure such as flood defenses.



## Short-term deadlines deliver long-term projects in Brazil

By 2020, Brazil's burgeoning middle class of households with annual incomes between \$10,000 and \$30,000 will have topped 35 million, according to research firm Oxford Economics. Political, social, and economic advances over the past decades have consolidated Brazil's image as a democracy free of economic instability that is making all the right moves toward reducing historically high levels of income inequality.<sup>1</sup>

Now, Brazil seeks to burnish its image on the world stage with marquee mega-events like football's 2014 FIFA World Cup™ and the 2016 Olympics and Paralympics in Rio de Janeiro, both mega-events that signal its economic standing as the gateway into South America. The 2016 Olympics and Paralympics in Rio represent the first ever Olympic Games held in South America.

An experienced pro at organizing large-scale public events, Rio hosted the Military World Games in 2011, a multisport event for military athletes organized by the International Military Sports Council (CISM). In 2012, the city hosted Rio+20, the United Nations Conference on Sustainable Development. And the 2013 Carnival, which attracted more than 6 million people to Rio, up from 2 million in 2004, was hailed as a well-organized, well-run event.<sup>2</sup>

More recently, the transformation in Rio de Janeiro, resulting from the vast preparation required to host a mega-event, ranges from security to transportation to urban regeneration. As the city moves up the urban

infrastructure evolution (see page 11), its residents are beginning to expect other services, as evidenced by public protests in mid-2013 over demands the government address social problems.

Overall, Brazil is attempting rapid development in several categories of the infrastructure evolution, which can be daunting. To bridge the gap in financing, public officials are collaborating with the private sector.

### Massive investment

In fact, several hundred public and private infrastructure projects are already underway: Partnerships with the private sector account for 70 percent of the budget for the Olympics. And the country has slated close to \$1 trillion in energy, housing, and transportation infrastructure investment over the next decade as part of the government's Growth Acceleration Program of Investment. Latin America's largest economy, Brazil attracted \$65 billion in foreign direct investment (FDI) inflows in 2012, the world's third largest share after China and the US.<sup>3</sup>

A \$3.5 billion regional airport infrastructure program, announced by the Brazilian government in December 2012, calls for more than 130 new regional airports in previously unserved parts of the country. The objective: to ensure that more than 96 percent of the country lives within 100km of an airport.<sup>4</sup>

Officials point out that the wider infrastructure investment in roads, rail, ports, airports, hotels, telecommunications, energy, and security will serve the country well

into the future. Sérgio Cabral, governor of the state of Rio de Janeiro, says, "Rio will become a different city and state" because of the events, which will leave a "permanent legacy."

### Cohesive legacy

A legacy hastened by the rigid timelines that accompany mega-events, necessitating close cooperation between federal, state, and local government to structure a cohesive economic, physical, and social legacy.<sup>5</sup> Rio will make "close to 40 years' worth of investments during just five years" in preparation for the World Cup and the Olympics, according to Rio de Janeiro Mayor Eduardo Paes.

He says the Olympics and World Cup offer the "perfect opportunity for radical change that the city has been longing for and is in need of." The investments Rio is making encompass the regeneration of Brazil's favelas, or shanty towns, as well as bus rapid transit, and the port zone revitalization, all of which will benefit the economically disadvantaged. "My biggest concern," says Paes, "is to leave a legacy for Rio, a heritage of improved quality of life."

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Urban organization is highly developed, forward-looking, and clearly committed to a planning process that fosters continuing economic development and sustainable growth.<sup>37</sup>

The natural outcome of that planning process leads to the final stage of economic growth in which a region is globally recognized for its superior quality of life. Culture, leisure, green space, a deep respect for the environment, and ecologically viable living, as well as a strong system of elder care, all converge to define urban quality of life in the 21st century.<sup>38</sup>

### **Wider social agenda**

Today, many cities and regions are casting a wider net beyond economic return to target health, education, employment, community cohesion, housing needs, security, and sustainability for their residents.<sup>39</sup>

They are using mega-events as a springboard to develop wider social

agendas in keeping with a superior quality of life. Toronto, for example, host of the 2015 Pan American Games, has already set in motion a legacy for the event that encompasses community inclusion and improvement.<sup>40</sup>

Similarly, Qatar's Vision 2030, an ambitious plan encompassing economic, human, social, and environmental development is already interwoven into the legacy of the 2022 FIFA World Cup™, which Qatar will host.

The peninsula nation in the Middle East was lauded in 2012 by Hans Rosling—a medical doctor and statistician who researches global economic development, agriculture, poverty, and health—for its “extraordinary modernization.”<sup>41</sup> Ranked the most competitive economy in the Middle East and 13th out of 148 countries worldwide analyzed by the World Economic Forum, Qatar aims to metamorphose from its reliance on oil and gas to an innovative, knowledge-based economy.<sup>42,43</sup>

The country will spend more than \$200 billion on infrastructure projects between 2013 and 2018. Qatar had already begun repositioning itself as a sports and entertainment hub in the Middle East by hosting the 2006 Asian Games as well as both the Pan Arab Games and the Asian Football Confederation's Asian Cup in 2011.<sup>44</sup>

### **Talent dimension**

However, legacy goes far beyond physical infrastructure to encompass the added know-how and expertise about *how* to develop the infrastructure. More importantly, it's about the know-how and expertise to manage, maintain, and operate the infrastructure over the long term. In fact, the talent dimension cannot be understated.

Talent can also be harnessed for volunteer activity, as the Sochi 2014 Olympic and Paralympic Winter Games illustrated, with its 25,000 volunteers, whom one reporter referred to as “relentlessly cheerful.” In an effort to attract

## **What does it take to realize a city's vision?**



Source: PwC analysis



volunteers, the Sochi Organizing Committee provided them with room and board for the first time in the history of the Games; in the past, volunteers have always been expected to find their own.<sup>45</sup>

Ultimately, mega-events provide an unrivaled opportunity for a region to propose, plan, and deliver major regeneration work over a five-to-seven-year period.<sup>46</sup> Dmitry Chernyshenko, CEO and President of the Sochi Organizing Committee said, “It’s clear that hosting the Games has already led to major economic, environmental, and social transformation—from the introduction of new green standards to measures promoting the integration of people with disabilities into mainstream Russian life.”

The Sochi 2014 Olympic and Paralympic Winter Games accelerated infrastructure development by several decades by adding 220 miles of roads and bridges and some 125 miles of railroad track as well as renovations to the airport, power grid, telecommunications infrastructure, and sanitation systems.<sup>47</sup>

PwC analysis finds that managing growth effectively and sustainably is crucial to long-term development; otherwise a city or region can get swept away by the unintended consequences of a rising wave of urbanization.

### ***New frontiers of possibility***

Managed well, growth offers new frontiers of possibility, allowing a city or region the opportunity to transform itself from a basic phase of the infrastructure evolution to a more advanced phase. Without that type of diligently planned growth, however, a city or region can degenerate into an overcrowded morass of economic, social, and environmental ills.<sup>48</sup>

To realize the entirety of a region’s potential, we recommend that officials address economic, social, and environmental issues cohesively and proactively while maximizing opportunities decades into the future, as illustrated on page 16. Those opportunities might well include hosting a large national or international event, mega or otherwise, as officials make informed choices to assess and build a competitive position that identifies and distinguishes that particular city or region.

## Super Bowl XLVIII: Making history, cementing a legacy

More than 111 million viewers tuned in to Super Bowl XLVIII on February 2, 2014, making it the most-watched television event in US history.<sup>1</sup>

In selecting a host city in the US for this eagerly anticipated, high-profile annual event, the National Football League (NFL) seeks very specific criteria. Frank Supovitz, NFL Senior President, Events, says those criteria include:

- A world-class stadium
- Broad support for the event from the local and regional governments, the business community, and fans
- Supporting infrastructure (facilities, transportation, hotel rooms) to accommodate the athletes and staffs as well as the fans who travel to the event

Proprietary PwC analysis has found that when those criteria are in place, the city and region stand to gain both direct and indirect benefits, economic and otherwise. Direct economic benefits include spending by the NFL, businesses, visitors, and media on area lodging, transportation, food and beverage, entertainment, business services, and other hospitality and tourism activities.

Indirect benefits can last well into the future as cities and regions upgrade infrastructure and leverage the high profile of the Super Bowl to attract additional events as well as business and recreational travelers.

### Big win

"It was a big win for both states," says Alfred F. Kelly, Jr., President and CEO

of the New York/New Jersey Super Bowl Host Committee. For the first time in Super Bowl history, the event was hosted jointly by two states because neither state individually met the necessary criteria to host the event.

According to Kelly, New Jersey provided the world-class stadium, and practice facilities while both states provided the hospitality required to host teams (who stayed in New Jersey), staff, fans, media, and related visitors. And state and local officials in both New Jersey and New York provided active support and collaboration all along. "We worked closely with the local host committees and local governments to understand what they want to communicate about their markets to the nation and the world," says Supovitz.

In addition to the game itself, a variety of related events in both New York and New Jersey during Super Bowl Week drew several thousands of fans during what's typically considered the off-season for tourism in the region. "It was an ideal opportunity to showcase the region and all of its iconic elements," says Kelly.

### Accelerated infrastructure development

Says Supovitz, "The Super Bowl is an incredible deadline that communities can leverage to accelerate important permanent improvements for their region—improvements that can be promoted through the enormous media coverage during the Super Bowl week."

Supovitz also cites examples from Indianapolis and New Orleans, both

recent Super Bowl cities. Indianapolis secured corporate and government funding for urban regeneration of the city's Near East Side and built a permanent event-ready festival space for residents and visitors in the vicinity of the stadium. New Orleans, meanwhile, unveiled a new streetcar line to bring fans within a block of the stadium in time for the Super Bowl.

In New Jersey, mass transit improvements increased capacity by 20 percent after New Jersey Transit extended the Secaucus, NJ, train platform. Concrete foundations were already in place as part of the long-term plan for expansion of the train station, which was completed in 2003.<sup>2</sup>

### Complex logistics

Of concerns about the weather for Super Bowl XLVIII, Kelly said, "Our main objective is to be prepared for anything and everything. We thought about and planned for all possibilities and created various contingency plans to deal with each one." Ultimately, mild weather on game day did not necessitate activating any of those plans.

Kelly says the logistics of Super Bowl XLVIII were "more complex than any previous game" because it spanned two states. His team, with the lead of the New Jersey State Police, worked with more than 50 local and national agencies to coordinate security, including the New York City Police Department, the Port Authority of New York and New Jersey, the Metropolitan Transportation Authority, New Jersey Transit, and the US Department of Homeland Security.



## *Being a Super Bowl host city is itself a legacy.*

—Frank Supovitz, NFL Senior Vice President, Events

### **Lasting legacy**

Kelly estimates several hundred million dollars in direct and indirect regional economic impact from Super Bowl XLVIII. But he also hopes the event cemented the reputation of the region as the place to go for big events: Given the substantial support and collaboration from local and regional authorities in New York and New Jersey and the massive preparations by both states, Super Bowl XLVIII can pave the way for the region to host other large-scale events in the future. That will be one of its lasting legacies.

“Being a Super Bowl host city is itself a legacy,” the NFL’s Supovitz says, adding that the exposure enjoyed by a Super Bowl host city—over the event’s 48-year history—has successfully attracted more business to the region in the form of other sporting events as well as meetings and conferences hosted by businesses and professional associations.

“Already,” says Supovitz, “both Newark and Jersey City have effectively used their involvement with the Super Bowl to change the conversation about their municipalities and attract new visitors.” Newark hosted Super Bowl Media Day, which brings national and international reporters to the city to interview players a week before the game. Meanwhile, Jersey City is where both teams—the Seattle Seahawks and the Denver Broncos—stayed.

### **Leveraging intellectual capital**

And Indianapolis, host of Super Bowl XLVI in 2012, has actively sought and hosted high-profile sporting events for decades, from the annual Indianapolis 500 to the 1987 Pan American Games. A recurring host for college basketball’s “March Madness,” Indianapolis also frequently hosts golf, diving, gymnastics, and track and field matchups.<sup>3</sup>

Indianapolis is a model case study of the type substantiated by PwC research. Our research has found that the expertise required to stage an event such as the Super Bowl—substantial infusions of capital, dedication of vast resources, and the commitment of various participants over the long term—serves as the foundation of intellectual capital. This intellectual capital may be successfully leveraged for other events—including those outside of sports, such as business meetings, conventions, and various expos—by city and regional officials collaborating with local business interests.

1. Bill Carter, “Seahawks-Broncos Super Bowl TV Ratings Top 111 Million,” *The New York Times*, February 3, 2014.
2. Mike Frassinelli, “To Make it Super, Meadowlands Train Needs Longer Platform, Says NJ Transit,” *The Star-Ledger*, March 20, 2013.
3. Larry Olmstead, “Super Bowl XLVI’s Real Winner? Indianapolis,” *Forbes*, February 6, 2012.



To determine what type of event a city or region is best suited to host, given its own priorities for long-term growth and development, officials can use PwC's Playing to Win framework on page 2 to see how their priorities for long-term development intersect with a particular event, be it a marquee global event such as the Olympics or smaller scale regional or national events.

Armed with a clear understanding of how best to leverage the event as a catalyst for long-term development with measurable results, officials can develop an outcome-oriented bid for the event.

Submitting a winning bid requires comprehensive planning and collaboration. The first step is bid leadership that clearly illustrates commitment from local, state, and central government—as well as private-sector partners—toward a detailed plan for facilities, infrastructure, and event staging. Beyond that, the region should be well-enough known that it can draw the required audience.

### ***No backing down***

The expertise required to stage a mega-event is highly sophisticated. These events require substantial infusions of capital, the dedication of vast resources, and the commitment of all participants over the long term. Cities and regions should not undertake these events lightly.

Once the selection process ends, there's no backing down. As a result, cities and regions seek experts who can demonstrate previous experience. That experience serves as the foundation of an intellectual capital legacy for each city or region to build on, thus making every successive bid easier and cementing a city's or region's arrival on the world stage.

And all parties involved need clarity about what they're trying to deliver. PwC analysis illustrates that when mega-events are appropriately planned and implemented, they can stimulate a wide range of other activities, which in turn, can bring economic and social growth over the long term.

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## **Representative projects of PwC's Global Centre of Excellence for Sports Mega-Events include:**

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Olympics and Paralympics, Rio de Janeiro 2016

Pan American Games, Toronto 2015

Olympics and Paralympics, Sochi 2014

Super Bowl, New York/New Jersey 2014

Youth Olympic Games, Nanjing 2014

World Cup, Brazil 2014

America's Cup, San Francisco 2013

Asian Youth Games, Nanjing 2013

Universiade, Kazan 2013

Olympics and Paralympics, London 2012

Universiade, Shenzhen 2011

African Cup of Nations, 2010

Olympics and Paralympics, Vancouver 2010

World Cup, South Africa 2010

Olympics and Paralympics, Beijing 2008

World Swimming Championships, Melbourne 2007

Commonwealth Games, Melbourne 2006

World Cup, Germany 2006

Olympics and Paralympics, Sydney 2000

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