



UCI Stakeholder Consultation:  
'A Bright Future for Cycling'  
Executive Summary

22 May 2013

# This executive summary provides an overview of the consultation process, including its objectives and methodology, the opinions of the stakeholders and Deloitte's recommendations to the UCI

- This executive summary is a précis of the findings contained in the full report to the UCI Management Committee dated 22 May 2013.

## Introduction

- Following a pilot consultation called “Common Ground”, in November 2012, the UCI announced its intention to conduct a wide-ranging stakeholder consultation exercise to help develop “A Bright Future for Cycling”.
- Subsequently, in December 2012, the UCI President wrote to cycling stakeholders (including riders, teams, race organisers, sponsors, sports institutions, the media and fans) inviting them to contribute their ideas to the core pillar topics to be covered by the consultation exercise, to ensure that all perspectives and areas of concern were considered.
- The UCI wished to demonstrate to its stakeholders, including cycling fans, that it wanted to listen and respond to their views. The results of this consultation process therefore provide insights into the opinions expressed as to some of the changes to be considered for cycling to improve its organisation, functioning and image. In other words, the consultation will inform the UCI's overall vision for the next generation of cyclists and cycling fans globally.
- The UCI engaged Deloitte (“we”, “us”, “our”) to conduct the consultation process across the broad spectrum of cycling's stakeholders.
- With the support of the UCI, Deloitte designed two online surveys and conducted a series of stakeholder working groups to better understand cycling stakeholders' opinions regarding the current status and future development of the sport in respect of the designated themes of globalisation, anti-doping, calendar and riders.
- The results of the survey and working group discussions, together with our recommendations to the UCI Management Committee, are presented within this report.

- We note that whilst the Consultation exercise has been running, the UCI has continued to work on a number of related projects based on a participative stakeholder approach (for example relating to the professional road racing calendar, new technology and financial fairness).
- We further note that many stakeholders, survey respondents and working group participants have presented ideas and submitted written materials which, for reasons of brevity, are not reproduced in full in this document. All these have been passed to, and gratefully received by, the UCI who will consider and use those submissions as appropriate in the further development of a bright future of cycling.

## Methodology

- Two online surveys were designed by Deloitte in consultation with the UCI.
- Both surveys went ‘live’ on 21 February 2013. The general public survey was available via the UCI website and was promoted through press releases and the UCI twitter account. The ‘cycling family’ survey was emailed to c.3,800 cycling family stakeholders on the UCI's database.
- The surveys closed on 15 March 2013 and achieved 6,369 responses, including 5,638 members of the general public and 731 cycling family stakeholders (a response rate of 19%, that is positive and in line with response rates we have seen with similar surveys for other sports organisations and sporting events).
- Whilst there are some limitations inherent to any web-based survey approach conducted on a global basis, the strong response means the results provide a solid base for identifying key findings and consequent recommendations.

## Working groups were attended by over 85 key stakeholders, including Grand Tour and other race organisers, team and rider representatives, anti-doping officials, sponsors, journalists and National Federations

### Methodology (continued)

#### Working groups

- To supplement the results from the online surveys, Deloitte facilitated five stakeholder working groups in March 2013 to cover the core pillar topics of the consultation exercise.
- The purpose of the working groups was to provide key relevant stakeholders with the opportunity to input their opinions, which have been used to inform the consultation's findings and recommendations.
- **Over 85 stakeholders** were present across the five working groups, including some of cycling's most influential organisations and individuals:
  - Representatives for **15 professional road cycling teams** provided input across the four pillars;
  - Several representatives of **National Federations** were present across the five stakeholder working groups;
  - Representatives from **all three Grand Tour organisers** were actively involved in the working groups on anti-doping, calendar and globalisation;
  - A **further nine race organisers** also attended these working groups, allowing for views from the Grand Tours, Classics and other stage and day races to be reflected;
  - Representatives at the calendar working group included event organisers, teams, the AIGCP, the Riders Athletes' Commission, the Professional Cycling Council, representatives of women's cycling, the CPA and event officials;
  - The 18 attendees at the anti-doping working group included **scientific and legal advisors**, an ethics professor, current and former professional **riders**, **National Federation** members, a national public health body representative and members of the **UCI's anti-doping commission**;
- Held over two days in London, the Globalisation working group was attended by **journalists**, **media** companies, **sponsors** and partners of professional cycling, merchandise representatives, representatives of **women's and men's cycling teams**, **National Federations** and **mass participation** event organisers;
- **25 professional riders** attended the Rider working group meetings to voice their opinions. Representatives from **every WorldTour team** were invited to attend;
- **The CPA** – the body responsible for representing professional cyclists – attended each of the five working groups to ensure that rider views were reflected; and
- At least three members of **UCI senior management were present** at each pillar working group to listen to the opinions of stakeholders.

Our headline recommendations span the four pillars as shown below. We have also identified detailed recommendations for each pillar that will be communicated separately to stakeholders

Recommendation		Anti-doping	Calendar	Globalisation	Riders
<b>Critical priority recommendations</b>					
1.	Restore credibility and public perception	✓	✓	✓	✓
2.	Make a clear decision on an inquiry into historic doping cases and 'rider amnesty'	✓			✓
3.	Develop a long-term strategic plan	✓	✓	✓	✓
4.	Further strengthen the anti-doping culture	✓			✓
5.	Improve the UCI's relationship with WADA	✓			✓
6.	Restructure the professional road cycling calendar		✓	✓	✓
<b>High priority recommendations</b>					
7.	Increase the independence of the Cycling Anti-Doping Foundation	✓			✓
8.	Appoint an independent anti-doping body to sanction professional riders	✓			✓
9.	Review the existing points system for professional teams		✓	✓	✓
10.	Develop women's cycling		✓	✓	✓
11.	Improve communication with professional road riders			✓	✓

## Deloitte have made 11 key recommendations, including six classified as ‘critically-important’, for the UCI to consider and act upon to enable cycling to achieve a ‘bright future’

### Recommendations

- Deloitte’s key recommendations to the UCI are based upon the results of the consultation exercise.
- Throughout the consultation, stakeholders commented on many positive aspects of the UCI’s performance, for example:
  - the improvements that had been made in anti-doping activities in the last five years, based on the biological passport programme;
  - the very positive day-to-day working relationship many cycling family members have with the UCI;
  - its role in helping cycling to be seen as a fundamentally attractive and entertaining product.
- We acknowledge the good work the UCI has done in these areas and recommend they continue this.
- However, it is natural that an exercise of this project’s nature will tend to focus on areas where changes should be made, to enable future improvements.
- We have classified our recommendations in terms of importance. Additionally, we would make the overarching observation that for many stakeholders this consultation exercise, whilst seemingly viewed positively so far as a tool to assist the UCI to make the changes necessary to create ‘A Bright Future for Cycling’, will only continue to be regarded positively if the UCI demonstrates in as short a timeframe as possible, that it has acted on the results and recommendations.

### Critical priority recommendations

- We consider the following to be **critically-important recommendations**:
  1. The UCI must take the steps necessary to restore cycling’s and its own **credibility**, in particular in relation to the **public perception** of cycling’s anti-doping measures and current UCI leadership;
  2. A **clear decision** should be made as soon as possible as to what the objectives of an **inquiry into historic doping cases**, and any related ‘amnesty’ would be, whether they would be practically and legally possible, and whether the potential benefits would be worthwhile; any ultimate decision should be made only after consultation with WADA and USADA.
  3. Develop an overarching **long-term strategic plan** to define the UCI’s mission, objectives and priorities, in order to optimise the development of cycling globally;
  4. The extent and consistency of professional teams’ anti-doping obligations should be increased in order to **strengthen further the anti-doping culture** within top level cycling, as well as make it even harder for riders to dope;
  5. The UCI should continue and step-up its actions to **improve its relationship with WADA** at a political level so that it can work, in unison with WADA, towards developing anti-doping practices that are the leading benchmark for other sports; and
  6. The UCI should work with key stakeholders to **restructure the existing calendar** to create a simpler multi-tiered competition structure that promotes the ideal of the ‘best riders in the best races’, and includes a set of criteria against which aspiring WorldTour races, particularly in underrepresented parts of the world, can be assessed.

We also acknowledge the positive factors about the UCI's work stakeholders have identified, including the improvements made in anti-doping measures in the last five years, and the areas where stakeholders have a particularly good relationship with the UCI

### Recommendations (continued)

#### High priority recommendations

- The following should be treated as a **high priority recommendations**:
  7. Changes should be made to increase the independence – and communications enhanced to improve the **perceived independence** - of the **Cycling Anti-Doping Foundation** (the foundation delegated responsibility for managing the operation of the UCI's anti-doping programme), including ensuring its controlling board members are external from the UCI;
  8. An **independent anti-doping body**, rather than National Federations, should be **responsible for sanctioning** all professional riders found guilty of doping offences, regardless of their nationality;
  9. The existing **points system** for professional teams and riders should be reviewed alongside the men's road cycling calendar, to support the proposed changes, as well as make the points system be considered fairer for riders;
  10. **Develop women's cycling** by focussing on the professional calendar in order to promote the sport at an elite level by working with organisers, teams and broadcasters. National Federations should be encouraged to take responsibility for developing women's cycling at a grass roots level; and
  11. **Improve communication with professional road riders**, including appointing a **Rider Relationship Manager**

There was a very good response to the survey, with almost 6,370 respondents in total, including over 730 cycling family stakeholders, spread across 73 countries

### Consultation results

- In producing our report, we read the open text responses provided by stakeholders. We have considered these in formulating our findings and recommendations, along with the working group discussions which we facilitated.
- Below we have summarised the key consultation results.

### The UCI's overall performance

- **56%** of the cycling family respondents described their relationship with the UCI as either 'good' (**36%**) or 'very good' (**20%**).
- However, only **48%** of sponsors or investors in cycling and only **41%** of riders described their current relationship with the UCI in a positive way.
- Public perception of the UCI in certain areas is less positive. In particular, **72%** of respondents rated the UCI's performance in fighting against doping as either 'poor' (**22%**) or 'very poor' (**50%**).
- A number of the cycling fans who responded to the survey expressed their lack of support for the UCI's leadership.

### Anti-doping

- **72%** of all respondents (cycling family and general public) believe cycling's anti-doping measures have strengthened in the last five years (78% cycling family and 71% general public).
- Whilst **60%** of general public respondents concur that cycling is leading the way in anti-doping practices and a similar proportion agree that significant progress has been made in anti-doping in the last five years, only **21%** believe that cycling will be a "clean" sport within the next five years.
- **61%** of all respondents believe the current penalties for riders caught doping to be too lenient.
- **52%** of cycling family respondents were dissatisfied with the current doping sanctions process (where National Federations are responsible for deciding on doping sanctions), including **22%** who consider the process to be 'very unsatisfactory'.
- Only **4%** of all respondents thought that National Federations should be responsible for deciding on doping sanctions.
- **74%** of general public respondents were in favour (strongly or somewhat) of a rider 'amnesty', compared with **52%** of cycling family respondents.
- **42%** of all respondents believe the decision on doping sanctions should be the responsibility of an independent anti-doping tribunal (rather than a rider's National Federation);
- Only **35%** of cycling family respondents believe the recently-introduced anti-doping helpline for professional riders to be an effective method to reduce doping.
- Several stakeholders called for better collaboration between the UCI and WADA. For example, one general public respondent commented: "*I think the battle of personalities between the UCI, WADA and USADA and so on is very bad for the sport – please focus on where you can cooperate, not on 'being right'*".

## The majority of respondents supported the principle that the UCI WorldTour should represent the ‘best riders’ in the ‘best races’

### Consultation results (continued)

#### Professional road cycling calendar

- **87%** of the cycling family (**68%** of the general public) believe the UCI’s role in setting the dates of races on the international calendar is important or very important. Over half of all respondents noted that the UCI’s performance in this regard was ‘good’ or ‘very good’.
- The majority (**51%**) of general public respondents supported the principle that the professional calendar format should encourage the ‘best riders’ to participate in the ‘best races’.
- Only **28%** of the general public respondents understand the UCI World Team points system and **31%** understand the UCI WorldTour rider points system .
- Unsurprisingly, given the above, most respondents noted that they did not understand the sporting evaluation currently used to determine teams’ participation in UCI WorldTour events.
- General public respondents were divided in terms of whether the UCI WorldTour and Continental Circuit hierarchy is clear and understandable (**37%** in favour, **36%** against).
- The majority of both general public (**60%**) and cycling family (**54%**) respondents thought that there were enough UCI WorldTour races. One quarter of the cycling family respondents (**25%**) believe there are too many WorldTour races.
- **31%** of the cycling family who expressed an opinion agreed that the duration of selected stage races should be reduced in order to enable the development of the calendar.
- The anti-doping record and policy of teams, as well as a team’s sporting performance in the previous season, were both seen as the key factors that should determine whether a team participates in the UCI WorldTour.

- In terms of ranking teams annually, 50% of general public respondents agreed that a single points system should be used for the annual ranking of teams
- The results show a very strong overall level of support for measures to develop women’s cycling. As one general public stakeholder noted, *“Women’s cycling is crucial to develop, both in terms of equality and the grassroots effect.”*
- The overall opinion of stakeholders was that new technology options would be a positive development in terms of making cycling more attractive for fans.

#### Working groups comments (professional road cycling calendar)

- Working group members acknowledged the following:
  - in globalising the UCI road calendar a balance is required between maintaining traditional events in the cycling calendar and creating new events in growth markets;
  - developing new competitions where there is no base of local support is challenging and that, in these cases, the UCI should help to ensure high quality broadcaster and event organiser are used;
  - races need to provide the viewer with a narrative that is easy to follow;
  - new events should prove themselves to be included on the UCI WorldTour calendar, by meeting a set of criteria.
- Working groups also discussed the recent proposals for a World Series Cycling competition format, that include the creation of 10 new four-day races to take place alongside established races. An opinion held by some working group members was that such a format would be too restrictive to reflect the different circumstances in each potential new-race destination, and that creating 10 entirely new races would risk diluting the quality of races. Additionally, concerns were raised about the number of days racing that would be required of riders.

## 81% of general public respondents agree or strongly agree that the UCI should better promote women cyclists and women's events

### Consultation results (continued)

#### Globalisation

- **79%** of the general public sample agreed that there are opportunities to take part in cycling leisure events where they live, **78%** that there are opportunities to take part in cycling races / events and **78%** that cycling is an environmentally-friendly and sustainable sport.
- However, **49%** disagreed that cycling was well supported / funded nationally and **59%** disagreed it was well supported by government. **63%** disagreed there was a well-developed bicycle lane infrastructure where they lived and **55%** disagreed that they felt safe on roads. **61%** disagreed that cycling was equally popular amongst men and women.
- In terms of the priorities for the UCI on the globalisation of cycling, investing in grassroots cycling was a priority for **75%** of the general public and developing cycling infrastructure was a priority for **59%**. Amongst the cycling family, **65%** thought the priority should be investing in grassroots cycling.
- Regarding access to cycling locations and facilities to participate, access to road cycling and off-road cycling were viewed most positively; **79%** of the general public rated access to road cycling as 'good' or 'excellent' and **61%** for off-road cycling. However, **46%** viewed access to track cycling to be 'poor' or 'very poor'. Cycling family views on access mirrored those of the general public very closely.
- Regarding the number of UCI WorldTour races in different regions, **46%** of the general public and **42%** of the cycling family felt there were insufficient races in Africa. For South America, **47%** of the general public and **38%** of the cycling family thought there were not enough races. For North America, the figures were **48%** and **41%** respectively.
- Conversely, for the Middle East, **58%** of the general public and **39%** of the cycling family thought there were enough or too many races. For Europe, **81%** of the general public and **81%** of the cycling family thought there were enough or too many races.

- Among those who expressed a view, there is broad agreement amongst the general public and cycling family that UCI Continental Circuit races play a positive role in cycling's development across all regions; albeit 44% of the general public did not feel able to express an opinion.
- **81%** of general public respondents agree or strongly agree that the UCI should better promote women cyclists and women's events. **81%** of general public respondents also thought that the UCI should help National Federations to establish grassroots, high performance and coaching programmes for women.

#### Working groups comments (globalisation)

- The globalisation working group discussed the topic of grassroots cycling development, notably regarding the UCI's role and influence at the grassroots level. Key points included:
  - The UCI should provide an endorsement role in grassroots events, and not try to regulate too far down the 'pyramid';
  - Investment in "cycling for all" should be pursued through commercial partners and local affiliations with organisers and local government funding;
  - Mass participation events (MPEs) were highlighted as a positive way to encourage participation for all. Scheduling of elite events and MPEs together would heighten general public interest further;
  - The UCI should provide guidance for National Federations and local school programmes in respect of educating young cyclists; and
  - The UCI should act as a medium to connect experts, National Federations and governments in areas relating to the global development of amateur cycling that are beyond the UCI's direct remit.

## Amongst riders, satisfaction ratings in relation to team delivery were high, showing that teams generally seem to be getting the important matters right for their riders

### Consultation results (continued)

#### Riders

- Within the sample of **731** cycling family respondents, there were **133** riders - **89** UCI WorldTour riders and **44** UCI Professional Continental team riders. These results were supported by the views expressed by 25 professional riders that participated in the working group meetings.
- Although **41%** of riders rated their relationship with the UCI positively, **33%** rated it as average and **20%** rated it negatively; this indicates room for improvement in UCI-rider relations.
- **66%** of riders felt the appointment of a former professional rider to act as a Rider Relations Manager would improve their working relationship with the UCI.
- **65%** think better communication via the Professional Cyclists' Association would improve their working relationship with the UCI, and **63%** felt that having UCI staff / management present at races on a regular basis would have a beneficial effect.
- Riders were asked to rate the importance and satisfaction in a number of areas related to professional cycling. **98%** felt race road safety was important, **95%** race accommodation, **93%** rider insurance arrangements and **92%** race transfers.
- Riders were generally satisfied with most areas although **23%** were dissatisfied with race accommodation (hotel and food), **30%** dissatisfied with planning for a career after being a professional rider and **31%** with race transfers.
- Race transfers, race accommodation and race road safety are all above average in terms of importance for riders but are below average in terms of rider satisfaction. Therefore, these appear to be the areas requiring most attention from the UCI.

- Amongst riders, satisfaction ratings in relation to team delivery were high, showing that teams generally seem to be getting the important matters right for their riders.
- **82%** of professional riders were satisfied or very satisfied with their team's delivery in relation to creating a strong anti-doping culture.
- Regarding the perceived effectiveness of the UCI Athletes' Commission, **23%** of riders did not have a clear opinion on the matter. **24%** rated the Commission as 'effective' or 'very effective' but **23%** rated it as 'ineffective' or 'very ineffective'.
- **76%** of professional riders stated they were interested in working in cycling after retirement. The most popular areas were the roles of elite coach (**51%**), directeur sportif (**49%**) and team management (**48%**).

#### Working groups comments (riders)

- The riders' working groups discussed how to improve UCI-rider relations. Key points included:
  - The importance of riders feeling represented by the UCI within the wider cycling family;
  - Important issues should be promptly communicated to riders, and communication with riders should be undertaken in a clear and concise manner; and
  - Dialogue should be established with the CPA and UCI Athletes' Commission to identify the best means for these bodies to support and represent riders and act as another form of connection between the riders and the UCI. There was strong support among riders for the appointment of a former professional rider as a Rider Relationship Manager. This was seen by working group members as the preferred option for improving communications.

There was a strong bias towards road cycling amongst survey respondents, with 78% of respondents indicating they participated in road cycling either ‘often’ or ‘very often’

### Consultation results (continued)

#### Respondent demographics

- Given the nature of the online survey, the population of respondents is not necessarily fully representative of the cycling community globally. The general public survey was completed by **5,638** respondents, spread across **73** countries.
- **12** countries accounted for **90%** of the responses, with the UK and USA collectively accounting for **46%** of respondents.
- **63%** of general public respondents came from Europe, followed by North America (**24%**) and Oceania (**10%**). Asia, South America, Africa and the Middle East collectively accounted for the remaining **3%** of respondents.
- **731** cycling family stakeholders from **55** countries completed the cycling family survey. There was a strong bias towards Europe (**77%**) and North America (**11%**). Oceania accounted for **5%** of responses with Asia, South America, Africa and the Middle East each under 3% of respondents.
- Almost **90%** of respondents were male.
- In terms of cycling participation, there was a strong bias towards road cycling, with **78%** of respondents indicating they participated in road cycling either ‘often’ or ‘very often’. Commuting (**43%**) and mountain biking (**26%**) were the next most popular forms of participation in cycling, with other forms far less popular among respondents.

## Limitations

This summary document has been prepared pursuant to our engagement with the UCI, solely to assist an understanding of the key findings arising from the consultation process. It is necessarily a summary, limited to matters which we have identified that appear to us to be of significance within the context of our engagement, and does not necessarily contain all matters relevant to a proper understanding of the findings included in our full report to the UCI management committee dated 22 May 2013. Insofar as this document contains conclusions and opinions, these are statements of opinion and should not be treated as statements of fact. These conclusions and opinions are derived from the work we have undertaken, as described herein, and are held at the date hereof but may not be applicable thereafter. We give no undertaking to update or correct any conclusion, opinion or fact in the light of circumstances arising or information becoming known after the date hereof

The UCI has asked for our consent to make this summary document publicly available. We have agreed to provide such consent on the following conditions (i) This summary document may not be suitable for the use of any person other than the UCI. Accordingly, publication of this summary document to persons other than the UCI is for information purposes only and no person should place any reliance on this summary document; and (ii) We do not assume or accept or owe any responsibility or duty of care to any person. Accordingly, any person who, contrary to the above, chooses to rely on this summary document does so at their own risk and we will not be responsible for any loss occasioned to any person acting or refraining from action as a result of any material in this summary document.

Some of the matters covered in this summary document are by their nature technical. The intended recipient of the full report, the UCI management committee, is familiar with the issues, facts and other matters addressed and the full report and summary document was written with that in mind.

We understand that the UCI intends to translate a version of this summary report into French. However the English version of this report remains the only definitive version. We will not accept any duty of care or liability to the UCI or any other party in respect of any other version of this summary report.

For any queries arising in respect of this summary document, please contact the UCI ([ucimedia@uci.ch](mailto:ucimedia@uci.ch)).

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