

THE ECONOMIC IMPACT OF INTERNATIONAL SPORTS ORGANISATIONS IN SWITZERLAND

2014–2019

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Mandated by the Canton of Vaud, the City of Lausanne
and the International Olympic Committee

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Abstract

The International Academy for Sports Science and Technology – the AISTS – has completed a study on the overall economic impact of the International Olympic Committee (IOC) and other International Sports Organisations (ISOs). This study consolidates data from a total of 53 ISOs with a physical presence in Switzerland during the years 2014 to 2019.

The results show that, during this period, these organisations and their visitors spent an average of CHF 1.10 billion within Switzerland each year (compared to an average yearly spending of CHF 0.70 billion between 2008 and 2013). This spending generated CHF 0.58 billion of additional impact on the Swiss economy, creating an average yearly economic impact of CHF 1.68 billion for Switzerland (CHF 1.07 billion between 2008 and 2013), CHF 0.87 billion for the Canton of Vaud (CHF 0.55 billion between 2008 and 2013) and CHF 0.55 billion for the Lausanne region (CHF 0.25 billion between 2008 and 2013). This economic impact had a positive effect on employment, business tourism, and the construction sector.

This report was mandated by the City of Lausanne, the Canton of Vaud, and the IOC which requested the AISTS to update the economic impact study published in April 2015 and covering the six-year period 2008 to 2013 (Bousigue & Stricker 2015). In particular, the findings reveal that, between 2014 and 2019, ISOs increased their impact on Switzerland by generating a greater economic impact than during the 2008–2013 period. In particular, the value created corresponds to an increased impact of 57% for the whole Switzerland, 58% for the Canton of Vaud, and 120% for the Lausanne region.

Overall, these findings convey a very positive message about the significant economic impact that ISOs have on the Swiss economy. In addition, the study shows that the impact goes well beyond what is tangible. Swiss residents confirm to favour the presence of ISOs in Switzerland, considering it of great importance for the local economy, the social fabric and the sports environment.

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We also acknowledge the trust demonstrated by the Canton of Vaud, the City of Lausanne and the International Olympic Committee, in mandating AISTS to conduct this study.

Finally, we express our appreciation to Professor Jean-Jacques Déthier from University of Berkeley, California and University of Bonn, and Professor Stéphane Garelli from IMD and the University of Lausanne, whose expert guidance and insightful review of study were crucial to the project.



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Foreword

International Sports Organisations (ISOs) have long been recognised as significantly influencing a country's prosperity. However, it is relatively complex to assess their overall economic impact. In 2007, the International Academy of Sports Science and Technology (AISTS) conducted an early impact analysis, which was a first step toward measuring the total contribution of the International Olympic Committee (IOC) to the local economy (at that time, the City of Lausanne and the Canton of Vaud). This study goes a step further, expanding the methodology to include most ISOs and the scope of the analysis to the rest of Switzerland.

This report build on prior work (Bousigue & Stricker 2015) and is remarkable in several respects. First, it covers a more comprehensive six year period. Second, It is also more comprehensive in terms of territorial scope since it examines the economic impact of the Olympic Movement on Lausanne, the Canton of Vaud and the whole Swiss Confederation. Third, it builds on survey information provided directly by almost all International Federations and other ISOs linked to the IOC. Finally, it takes one more step toward the measurement of the IOC's non-economic impact by surveying residents about their perception of the IOC and ISOs.

In line with AISTS's prior studies, we have chosen a conventional methodology to measure the economic impact of the Olympic Movement on the local economy, the canton and the country. This economic impact study is founded on the national income accounting (NIA) framework developed by Richard Stone and others, and on the multiplier analysis developed by J. M. Keynes. The NIA framework, which provides a baseline calculation of the actual direct contribution of sport activities to the local economy, is the most conservative approach of those used in the literature, as it is limited to measuring the direct impact of sport rather than the wider impacts on other sectors. One reason the NIA framework has often been used for measuring the economic importance of sport at the national level is that a large proportion of the data can be obtained from published sources. The methodology used in this report goes one step further by using multiplier analysis to measure the effects of an additional injection of spending into the local economy. It shows the direct, indirect and induced effects of a specific change in expenditure. It is an appropriate method for estimating the economic impact of sport events and activities, as these generate income, expenditure and employment that are additional to the normal flow of expenditure in the local economy.

We have also deliberately adopted a very cautious methodology and made particularly conservative assumptions, described in detail in the report, in measuring the economic impact. Results presented here are therefore conservative figures and the likely impact is much larger than what is reported.

This report shows that the impact of ISOs on the Swiss economy is significant and extensive. These findings are informative to both policymakers and the public, helping them recognise the positive contribution of such organisations on increasing the prosperity of their nation.



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Executive summary

As requested by the Canton of Vaud, the City of Lausanne and the IOC, the AISTS has completed a study on the economic impact of the IOC and other International Sports Organisations (ISOs) in Switzerland for the period 2014 to 2019. This study constitutes the second edition after a first report published in Fall 2015 and covering the years 2008 to 2013 (Bousigue & Stricker 2015).

This study determines the overall economic impact of ISOs, as well as measures their effect on direct employment, business tourism and construction. The report does not consider the impact on sport and leisure tourism and, therefore, does not capture the effect of international sport events taking place in Switzerland during the period analysed. The report is complemented by an analysis of Swiss residents' perceptions of the presence and importance of the IOC and other ISOs in Switzerland. Using consistent approaches in data collection and empirical analysis, the study allows comparison with the impact of ISOs on Switzerland for the 2008–2013 period.

The impact extends well beyond that created by the IOC administration alone. The IOC collaborates with and provides significant financial support to many other ISOs, in particular the International Federations (IFs) that are part of the Olympic Movement. Most IFs are located in Switzerland as a result of the IOC's presence in the country (Chappelet 2021). The appeal of the City of Lausanne, the Canton of Vaud and the Swiss Confederation have also played an important role to attract ISOs to the area in combination with coordinated public policies for the sport sector at the municipal, cantonal and federal levels (Bayle 2017; OFSPO 2021).

Key results

Between 2014 and 2019, the ISOs and their visitors spent together an average of CHF 1.10 billion in Switzerland (CHF 0.70 billion between 2008 and 2013) (Bousigue & Stricker 2015). This spending created an average yearly economic impact of CHF 1.68 billion for Switzerland (CHF 1.07 billion between 2008 and 2013), CHF 0.87 billion for the Canton of Vaud (CHF 0.55 billion between 2008 and 2013) and CHF 0.55 billion for the Lausanne region¹ (CHF 0.25 billion between 2008 and 2013). This includes direct, indirect and induced economic impacts. Every CHF 1 spent in Switzerland by ISOs created CHF 1.52 for the local economy.

The IOC and its financially supported ISOs generated CHF 1.38 billion of the average yearly economic impact in Switzerland. As a not-for-profit association, the IOC financially supports the organisation of the Olympic Games and the development of sport worldwide by redistributing its revenues. This includes a yearly average of CHF 157 million given to ISOs and other sports-related organisations in Switzerland.

¹ To be precise, CHF 550 million for the Lausanne region, CHF 873 million for the Canton of Vaud and CHF 1,682 million for Switzerland.

The ISOs that responded to our survey employed over 3,343 people in Switzerland in 2019 (corresponding to about 3,144 full time equivalents). Of these employees, more than three quarters worked for the IOC or its financially supported ISOs, and about 1,840 lived in the Canton of Vaud, of whom 996 resided in the Lausanne region. The same year, the total amount of income tax paid by ISOs' employees residing in the Canton of Vaud was estimated at CHF 57 million. ISOs contributed more than CHF 33 million on average each year to their employees' pension funds.

The study also reveals that the presence of the IOC and the ISOs in Switzerland generated, on average, more than 44,600 overnight business visits ever year, over 28,600 of which were in the Canton of Vaud. The construction industry also benefited from the presence of ISOs, with approximately CHF 292 million spent between 2014 and 2019 by the ISOs in Switzerland in this sector.

Similarly to the AISTS study on the economic impact of ISOs for the years 2008 to 2013 (Bousigue & Stricker 2015), the impact calculated here can be considered a conservative estimate for four main reasons. First, the study did not consider the money spent by all accompanying guests of ISO visitors. Second, missing data from ISOs was replaced by historical comparable data when applicable. Third, conservative multipliers were used to estimate the indirect and induced impacts. Finally, the economic impact of international sports events in Switzerland – some of which can be attributed to the ISOs' presence – were not included in the scope of the study.

The impact of ISOs extends well beyond tangible economic value. To capture (part of) the intangible impact, an additional survey was conducted on the reputation of the IOC in Switzerland. The results show that 77% of respondents residing in the French-speaking part of Switzerland consider it important for the local economy to host the IOC in Lausanne, and that 98% of respondents residing in the Canton Vaud and 75% of respondents residing in Switzerland are aware that the IOC is headquartered in Lausanne. Respondents also confirm feeling a sense of pride in hosting the IOC headquarter and value the City of Lausanne's title of "Olympic Capital".

Methodology

The study was carried out by AISTS under the guidance of two leading independent international economists: Professor Jean-Jacques Dethier from University of Berkeley, California and University of Bonn, and Professor Stéphane Garelli from IMD and the University of Lausanne. The study applied the method proposed by Barget (2001) and Stritt & Voillat (1998).

A tangible economic impact is defined as the product of a net injection and a multiplier. The spending of an economic actor (an ISO, in this case) in a reference area is called an injection. A net injection is the difference between financial flows in and out of a reference area. A multiplier – a concept from Keynesian theory – is a factor of proportionality that measures changes in direct spending and employment in a given area, in response to the net injection, after several rounds of spending.

First, the primary income (the combination of the direct and indirect impacts) is computed. The direct impact mostly corresponds to the effect on local residents of salaries and social security contributions paid by ISOs as well as by the construction and business tourism sectors as a result of the activity generated by ISOs. The indirect impact corresponds to the effect on local companies of purchased goods and services and investments.

Second, the induced impact (i.e. the expenses induced by the spending of the primary income by local residents and local companies) is calculated.

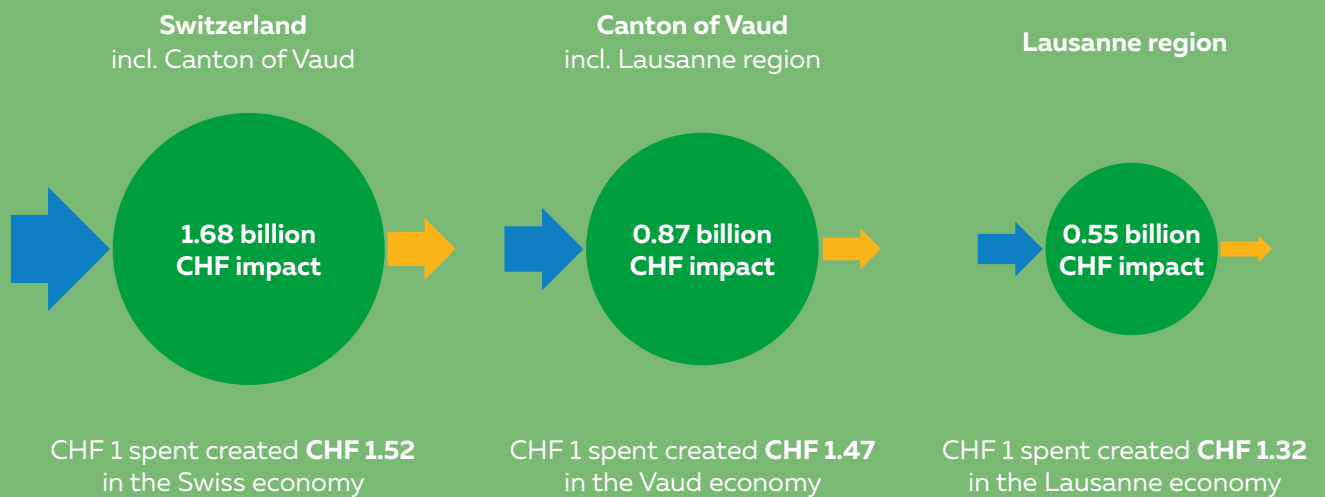
Finally, the overall economic impact is estimated by adding the primary income (direct and indirect impacts) to the induced impact.

The data was collected using spreadsheet surveys emailed by the AISTS to a total of 58 ISOs. It was strictly confidential and no data was disclosed in any unconsolidated manner. Follow-up emails, phone calls and meetings were held to seek clarification and control the validity of the data. All ISOs except five provided the requested data.

The economic impact of international sports organisations 2014–2019

Yearly average economic impact

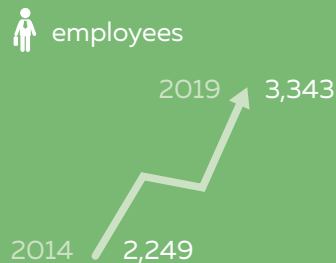
● outside revenue ● outside expenditure (leakage) ● net impact



Business tourism



Direct employment



53 international sports organisations

● Lausanne region ● Canton of Vaud ● Switzerland



Definitions

Direct impact: effect of salaries and social security contributions on local residents.

Indirect impact: effect of purchased goods and services and investments on local companies.

Induced impact: expenses induced by the spending of the primary income by local residents and local companies.

Injection: spending of an economic actor in a reference area.

Net injection: spending inside the reference area that is financed by revenue from outside of the reference area.

OCPM-overhead costs and profit margins: combination of finance charges, taxes, risks and profit.

Overall economic impact: sum of the primary income and induced impact.

Primary income: sum of the direct and indirect impacts.

Tangible impact: product of a net injection and a multiplier.

1 Methodology: the economic impact model

This section describes the methodology related to the economic impact, which is the primary focus of the study. The methodology pertaining to the intangible impact is detailed in the relevant section (see chapter 6 “The impact of perception”).

1.1 Objective

The main objective of the study is to estimate the overall economic impact of ISOs in Switzerland and to shed light on their impact on direct employment, business tourism and construction.

1.2 Scope

1.2.1 Reference areas

- Lausanne region: the City of Lausanne as well as Belmont-sur-Lausanne, Cheseaux-sur-Lausanne, Crissier, Epalinges, Jouxteins-Mézery, Le Mont-sur-Lausanne, Lutry, Paudex, Prilly, Pully, Renens, Romanel-sur-Lausanne, Saint-Sulpice.
- Canton of Vaud (including the Lausanne region)
- Switzerland (including the Canton of Vaud)

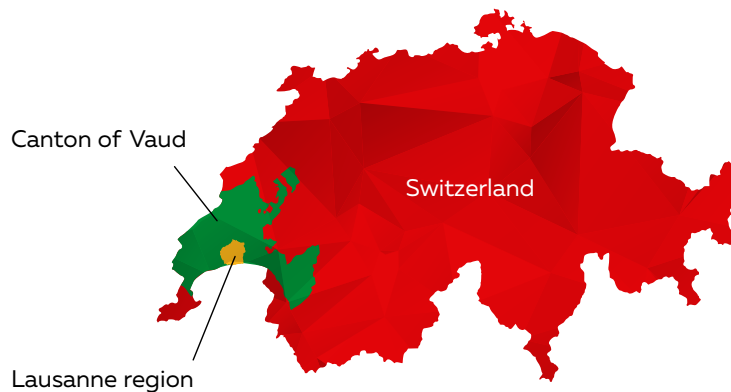


Figure 1: Geographical map of the three reference areas.

1.2.2 Reference years

The report shows the economic impact for 2014, 2015, 2016, 2017, 2018 and 2019. To provide a single measure for this entire period, results are generally presented as the six-year average.

1.2.3 Reference organisations

An ISO is a not-for-profit institution that has international reach and is in direct interaction with the Olympic Movement. The economic impact is calculated for ISOs with a physical presence, meaning they have a minimum of one employee residing in Switzerland for a minimum of one year. The following 53 ISOs with have a physical presence in Switzerland have participated to this study through sending their data.

1.2.3.1 40 ISOs in the Lausanne region

AIBA	Association Internationale de Boxe Amateur
AISTS	Académie Internationale des Sciences et Techniques du Sport
ANOC	Association of National Olympic Committees
ASOIF	Association of Summer Olympic International Federations
CAS	Court of Arbitration for Sport
EA	European Athletics
EGA	European Golf Association
FAI	Fédération Aéronautique Internationale
FEI	Fédération Equestre Internationale
FIAS	International Sambo Federation
FIE	Fédération Internationale d'Éscrime
FIG	Fédération Internationale de Gymnastique
FIH	Fédération Internationale de Hockey
FIMS	Fédération Internationale de Médecine du Sport
FINA	Fédération Internationale de Natation
FISU	Fédération Internationale du Sport Universitaire
FIVB	Fédération Internationale de Volleyball
GAISF	Global Association of International Sport Federations (formerly SportAccord)
IBSF	International Bobsleigh and Skeleton Federation
ICF	International Canoe Federation
IGF	International Golf Federation
IJF	International Judo Federation
IMGA	International Masters Games Association
IOC	International Olympic Committee
ISU	International Skating Union
ITA	International Testing Agency
ITTF	International Table Tennis Federation
ITU	International Triathlon Union
IWF	International Weightlifting Federation
SAC	SportAccord Convention
TS	Think Sport
UEG	Union Européenne de Gymnastique
WA	World Archery
WADA	World Anti-Doping Agency – European Office
WF	World Taekwondo Federation
WBSC	World Baseball Softball Confederation
WDSF	World Dance Sport Federation
WR	World Rowing Federation (formerly FISA)
WTF	World Taekwondo Federation
WUOC	World Union of Olympic Cities

1.2.3.2 6 ISOs in the Canton of Vaud (excluding Lausanne region)

ECA	European Club Association
FIBA	Fédération Internationale de Basketball
FIM	Fédération Internationale de Motocyclisme
UCI	Union Cycliste Internationale
UEFA	Union of European Football Associations
UWW	United World of Wrestling

1.2.3.3 7 ISOs in Switzerland (excluding Canton of Vaud)

ETA	European Tennis Association
FIA	Fédération Internationale de l'Automobile
FIFA	Fédération Internationale de Football Association
FIS	Fédération Internationale de Ski
IHF	International Handball Federation
IIHF	International Ice Hockey Federation
UIAA	Union Internationale des Associations d'Alpinisme

1.3 Data collection

1.3.1 Phase 1, 2016 to 2020: Yearly surveys to facilitate data collection

In January 2016, at the request of the City of Lausanne, the Canton of Vaud, and the IOC all executives of ISOs located in Switzerland were sent an official letter by email from the AISTS requesting to join the following economic study that would cover the years 2014 to 2019. A first spreadsheet to gather ISO's data for the year 2014 was sent early 2016. Additionally, to facilitate data collection, a spreadsheet had been provided in fall of each year requesting their ISOs' revenues, expenditures, number of employees, and visitors (meetings/non-sporting events) figures by reference area as well as pension contribution information, for the prior year.

Similarly to the previous AISTS economic impact study, reference areas were the Lausanne region, the Canton of Vaud, and the whole Switzerland. In mid-July 2020, a second official letter was sent to the executives of the ISOs by email to recall the importance of the study and boost participation.

With a few new organizations being added to the sample at later stage over the time span, a total of 58 ISOs with a physical presence in Switzerland were invited to participate and send their data. Annual response rate was high and reached, on average, more than 90%. In particular, only five ISOs could not provide the data requested, leaving a total of 53 ISOs sending their information.

1.3.2 Phase 2 in 2021: Treatment of missing information

Between January and June 2021, the data collected was analyzed. To maximize data collection and produce a conservative estimation, missing data from an ISO was replaced with its comparable latest historical data.

| All data was collected from
ISOs with a physical presence
in Switzerland

By June 2021, after a thorough follow-up from the AISTS with ISOs' respective financial and administrative departments, all data was collected from ISOs with a physical presence in Switzerland, except for five international sport organisations of small size. For the sake of simplicity, the term "ISOs" refers to the 53 responding ISOs.

1.3.3 Confidentiality

During the entire collection process, the data was submitted directly to the AISTS and held strictly confidential. No data was disclosed in any unconsolidated manner.

1.4 Data calculation

The study applies the method proposed by Barget (2001) and Stritt & Voillat (1998), that defines a tangible economic impact as the product of a net injection and a multiplier.

Calculating the overall economic impact of ISOs consists of six consecutive steps:

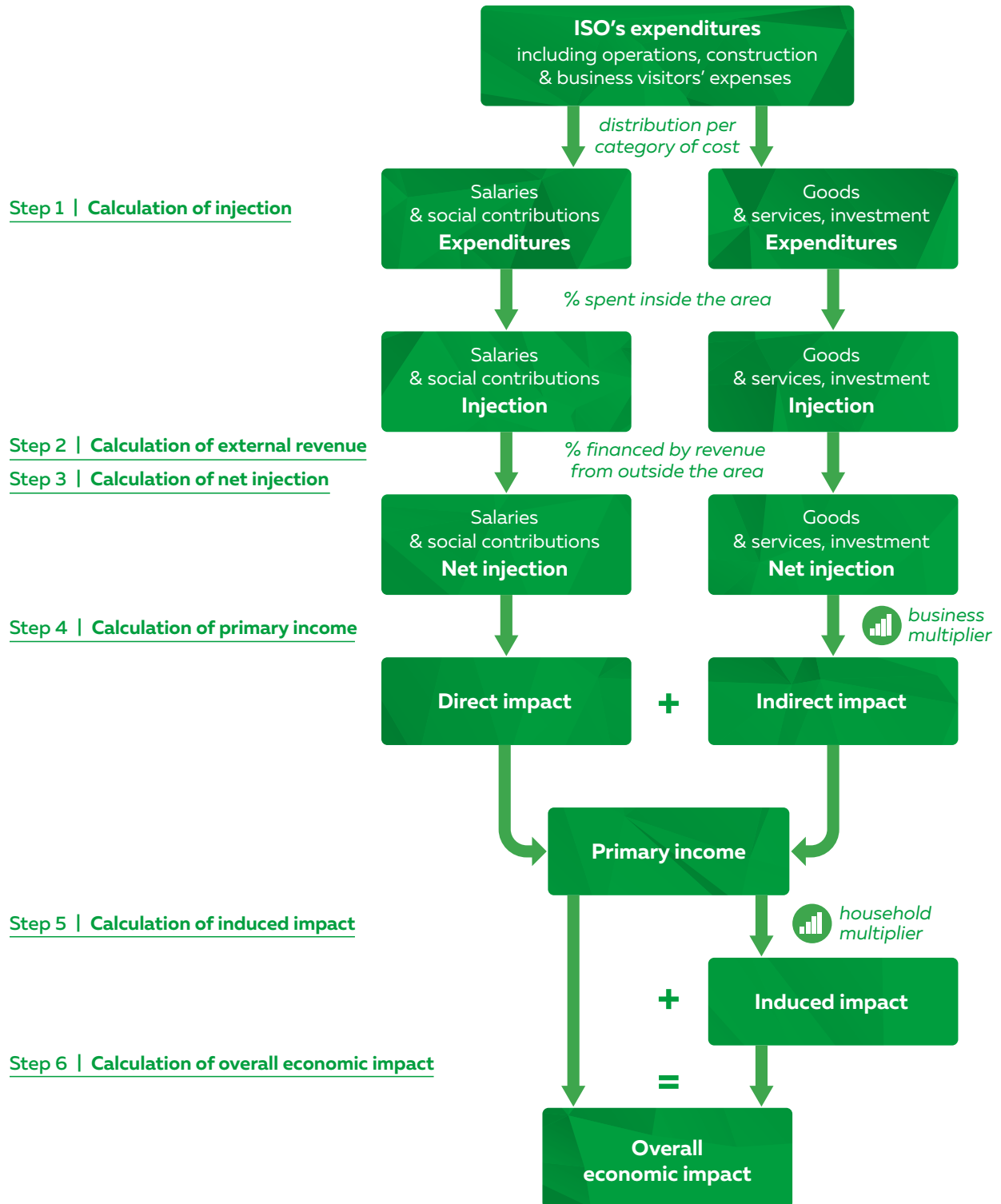


Figure 2: Simplified calculation flow of the overall economic impact of ISOs (based on Stritt & Voillat, 1998).

1.4.1 Calculation of the injection

The first step toward estimating the economic impact is to isolate the spending of an economic actor (in this case, an ISO) in a reference area. This is called the injection. Spending outside a reference area is not considered. For example, when calculating the injection for the Lausanne region, expenditures in the Canton of Vaud, in the rest of Switzerland or in the rest of the world are excluded.

For each ISO, the injection is calculated for each reference area, year and category of expenditures: salaries and social contributions, goods and services and investments. The study takes salaries and social contributions paid by ISOs, as well as by the construction and tourism sectors as a result of the activity generated by ISOs and their visitors, into consideration. Similarly, the study takes purchased goods and services and investments made by ISOs, as well as by the construction and tourism sectors as a result of the activity generated by ISOs and their visitors, into consideration.

1.4.2 Calculation of external revenue

The second step toward estimating the economic impact is to isolate the revenue of an economic actor (in this case, an ISO) from outside the reference area. This is called the external revenue. Revenue from inside a reference area is not considered. For example, when calculating the external revenue in the Lausanne region, revenue from inside the Lausanne region is excluded.

For each ISO, the external revenue is calculated for each reference area and year.

Financial support from the IOC is considered as revenue coming from outside Switzerland, as all ISOs in the world that are entitled to such funding receive it regardless of location.

1.4.3 Calculation of the net injection

The third step toward estimating the economic impact is to calculate the net injection in the economy. This corresponds to what is spent inside the reference area (injection) which is financed by revenue from outside of the reference area (external revenue). Regarding expenditures of visitors, only spending in the reference areas by those living outside the reference areas, which are therefore considered autonomous cash injections, have been counted.

Everything spent outside the region and covered by revenues from within the region is considered as leakage.

When considering the Lausanne region, the net injection is what is spent inside the Lausanne region which was financed by revenue from outside of the Lausanne region.

		Expenditures	
		inside Lausanne region	outside Lausanne region
Revenues	outside Lausanne region	positive impact	neutral impact
	inside Lausanne region	neutral impact	leakage

Figure 3 : Positive economic impact of ISOs on the Lausanne region (based on Junod 2005 and Preuss & Weiss 2003).

When considering the Canton of Vaud, the net injection is what is spent inside the Canton of Vaud which was financed by revenue from outside of the Canton of Vaud.

		Expenditures	
		inside Canton of Vaud	outside Canton of Vaud
Revenues	outside Canton of Vaud	positive impact	neutral impact
	inside Canton of Vaud	neutral impact	leakage

Figure 4 : Positive economic impact of ISOs on the Canton of Vaud (based on Junod 2005 and Preuss & Weiss 2003).

When considering Switzerland, the net change is what is spent inside Switzerland which was financed by revenue from outside Switzerland.

		Expenditures	
		inside Switzerland	outside Switzerland
Revenues	outside Switzerland	positive impact	neutral impact
	inside Switzerland	neutral impact	leakage

Figure 5 : Positive economic impact of ISOs on Switzerland (based on Junod 2005 and Preuss & Weiss 2003).

For each ISO, the net injection is calculated for each reference area, year and category of expenditures: salaries and social contributions, goods and services, and investments.

1.4.4 Calculation of the primary income

The fourth step toward estimating the economic impact is to calculate the primary income. This is the combination of the direct and indirect impacts.

1.4.4.1 Calculation of the direct impact

The direct impact mostly corresponds to the effect of salaries and social security contributions on local residents. As mentioned previously, the study takes salaries and social contributions paid by ISOs, as well as by the construction and business tourism sectors as a result of the activity generated by ISOs, into consideration.

Based on Nassar & Stricker (2007) and Stritt & Voillat (1998):

$$\text{direct impact} = \text{salaries and social contributions} + \frac{3}{4} \text{overhead costs and profit margins (OCPM)}$$

OCPM corresponds to the combination of finance charges, taxes, risks and profit. The direct impact is calculated for each reference area and year.

1.4.4.2 Calculation of the indirect impact

The indirect impact corresponds to the effect of purchased goods and services and investments on local companies. As mentioned previously, the study takes purchased goods and services and investments made by ISOs, as well as by the construction and business tourism sectors as a result of the activity generated by ISOs, into consideration.

Based on Nassar & Stricker (2007) and Stritt & Voillat (1998):

$$\text{indirect impact} = \left(\frac{1}{4} \text{OCPM} + \text{bought goods and services} + \text{investments}\right) \times \text{business multiplier}^2$$

OCPM corresponds to the combination of finance charges, taxes, risks and profit.

As per Nassar & Stricker (2007): “The value of the multiplier corresponds to the rate of leakage. The smaller the reference area, the higher the tendency to import the goods and services required, and therefore the more likely it is that the value of the multiplier will be reduced. The value of the business multiplier is influenced by the propensity to consume, the propensity to import and the marginal tax rate.”

To allow full comparability, the same business multipliers employed in the AISTS 2008–2013 economic impact study were used also in the current study.

The indirect impact is calculated for each reference area and year.

Reference area	Business multiplier
Lausanne region	0.396
Canton of Vaud	0.510
Switzerland	0.510

Figure 6 : Business multipliers used for the calculation of the indirect impact of ISOs per reference area.

² Cf. Nassar, V., Stricker, C., Economic Impact Study of the IOC Group on Lausanne and the Lemanic Arc, AISTS, Lausanne, 2007, p.23.

The formula for calculating the business multiplier (K_b) is:
$$K_b = \frac{1 - \mu}{1 - (1 - \mu) \cdot (1 - t) \cdot c}$$

where $(1 - \mu)$ represents the share of value added in the area and $\frac{1}{1 - (1 - \mu) \cdot (1 - t) \cdot c}$ the induced effects,

with c = marginal propensity to consume

t = marginal tax rate

μ = import-related share of the marginal propensity to consume

1.4.5 Calculation of the induced impact

The fifth step toward estimating the economic impact is to calculate the induced impact. This refers to the expenses induced by the spending of the primary income by local residents and local companies.

Based on Nassar & Stricker (2007) and Stritt & Voillat (1998):

$$\begin{aligned} &\text{Induced impact} \\ &= \\ &\text{primary income} \\ &\times \text{household multiplier}^3 \end{aligned}$$

As with the business multiplier, the same household multipliers employed in the AISTS 2008–2013 economic impact study were used also in the current study to allow full comparability. The data required to calculate multipliers for the six reference years is not available.

Multipliers have not been adjusted to reflect changes in the Swiss economy. Their value can therefore be considered conservative.

The induced impact is calculated for each reference area and year.

Reference area	Business multiplier
Lausanne region	1.43
Canton of Vaud	1.51
Switzerland	1.51

Figure 7 : Household multipliers used for the calculation of the induced impact of ISOs per reference area.

1.4.6 Calculation of the overall economic impact

Finally, the overall economic impact can be estimated by adding the primary income (direct and indirect impacts) to the induced impact. The economic impact is calculated for each reference area and year. The overall yearly average impact can then be calculated.

1.4.7 Double accounting considerations

In order to avoid any double accounting issues, visitors’ expenses that are paid by the visitors themselves are distinguished from expenses that are covered by ISOs, as the latter have already been captured under their expenditures.

Also, IOC financial support to ISOs is captured at the level of the ISOs as revenue coming from outside Switzerland, but is not captured under the IOC expenditure. This way, it is not counted twice.

³ Cf. Nassar, V., Stricker, C., Economic Impact Study of the IOC Group on Lausanne and the Lemanic Arc, AISTS, Lausanne, 2007, p.23.

The formula to calculate the Keynesian household multiplier (K_h) is:
$$K_h = \frac{1}{1 - (1 - \mu) \cdot (1 - t) \cdot c}$$

with c = marginal propensity to consume
 t = marginal tax rate
 μ = import-related share of the marginal propensity to consume

1.5 Limitations

The calculations may be affected by three types of limitations.

First, the results depend on primary data received from the ISOs with no possibility to control for their accuracy. However, a more frequent and systematic data collection process was used as compared to prior edition of the study to facilitate the work of the ISOs in providing accurate data. Moreover, clarification was sought through follow-up emails, phone calls and meetings and data was checked when necessary.

Second, although the high response rate by ISOs eliminated the need to extrapolate, most recent and comparable historical data was used to substitute missing information from ISOs. This procedure has helped maximize the use of data gathered and produce a conservative estimate.

Third, multipliers have not been updated, a task that was beyond the scope of this study and may have resulted in impact figures that are unduly conservative.

2 The overall economic impact

Together, the ISOs and their visitors spent an average of CHF 1.10 billion within Switzerland per year. This spending generated an average yearly economic impact of CHF 1.68 billion for Switzerland, CHF 0.87 billion for the Canton of Vaud and CHF 0.55 billion for the Lausanne region.

CHF 1.68 billion for Switzerland,
 CHF 0.87 billion for the Canton of Vaud,
 CHF 0.55 billion for the Lausanne region

This includes direct, indirect and induced economic impacts as detailed in Figure 9 on the next page. The impact of taxes paid by ISOs is also captured in the calculation of the overall economic impact.

As shown in Figure 8, the induced impact is responsible for the majority of the overall economic impact consistent with prior study⁴.

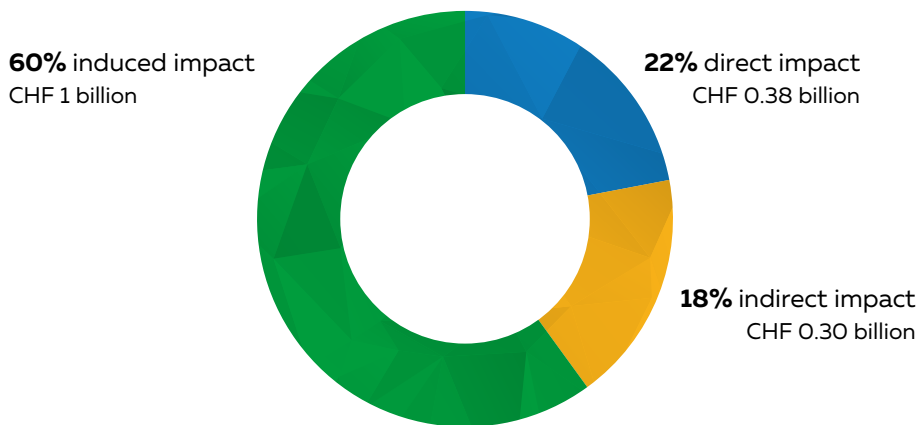


Figure 8: Distribution per type of impact of the yearly average overall economic impact of ISOs in Switzerland from 2014 to 2019.

⁴ Cf. Appendix 1 for the yearly, total and yearly average overall economic impact of ISOs per region and type of impact.

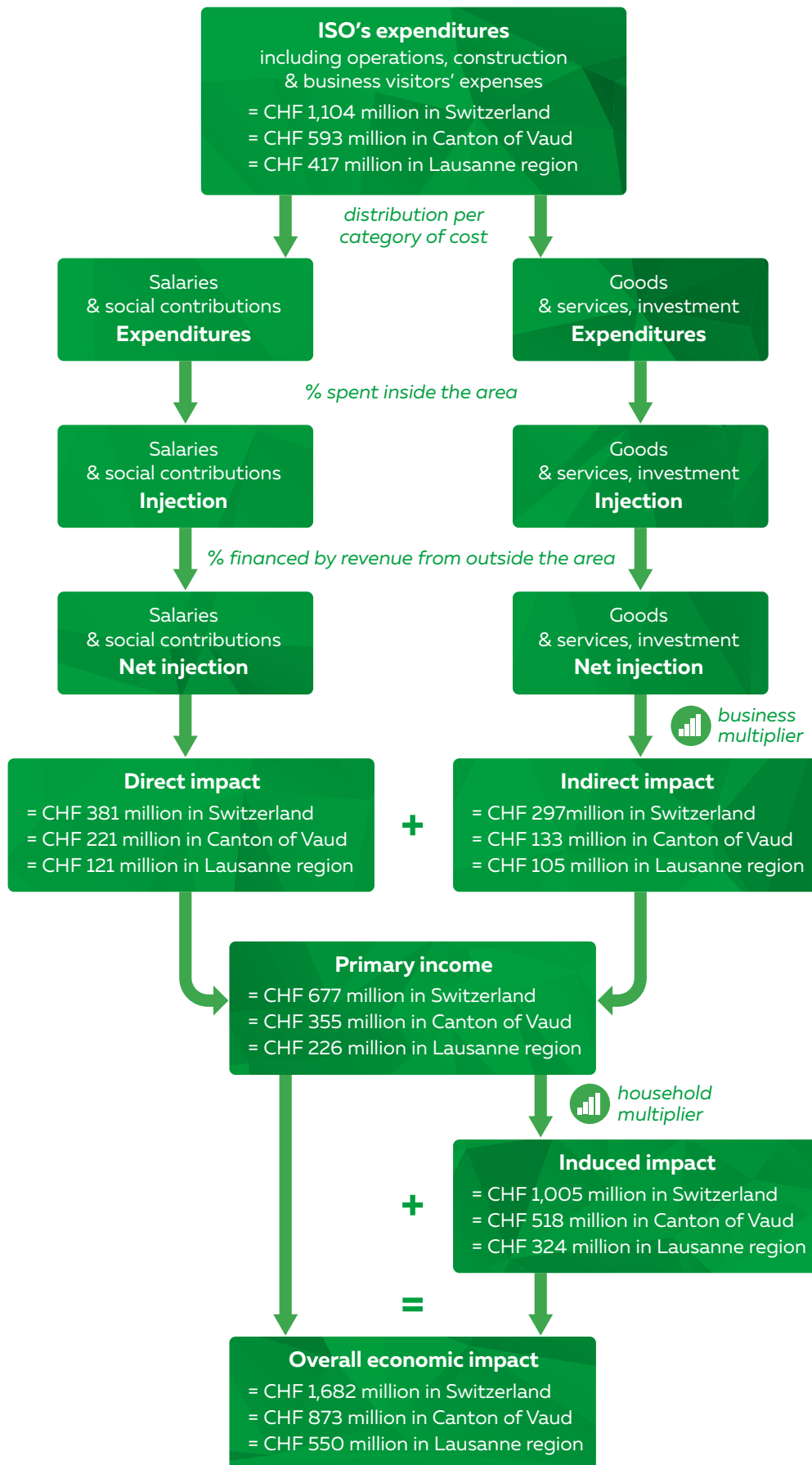


Figure 9: Simplified calculation flow with results of the yearly average overall economic impact of ISOs from 2014 to 2019 (based on Stritt & Voillat, 1998).

2.1 An efficient impact

The impact of ISOs on the Swiss economy is maximised by the fact that 96% of their revenue comes from outside Switzerland.

The impact of ISOs on the Swiss economy is maximised by the fact that 96% of their revenue comes from outside Switzerland

Subsidies from the IOC are considered as coming from outside Switzerland, as all ISOs in the world who are entitled to this funding receive it regardless of location.

An autonomous revenue combined with minimal leakage leads to the high efficiency of the possible impact. In the case of ISOs, leakage mostly corresponds to the redistribution of funds to sports associations and events all around the world. On average, yearly leakage captures 70% of all expenses incurred by ISOs, indicating that 30% of all resources spent remain in the local Swiss economy. However, there is some fluctuation in this distribution across organisations, with some ISOs spending a larger part of their revenues outside Switzerland than others.

Every CHF 1 spent in Switzerland by ISOs creates CHF 1.52 in the Swiss economy, which equals a 52% in added value.

Every CHF 1 spent in Switzerland by ISOs creates CHF 1.52 in the Swiss economy

2.2 A notable effect on the Canton of Vaud

More than half of the average yearly overall economic impact in Switzerland is captured by the Canton of Vaud.

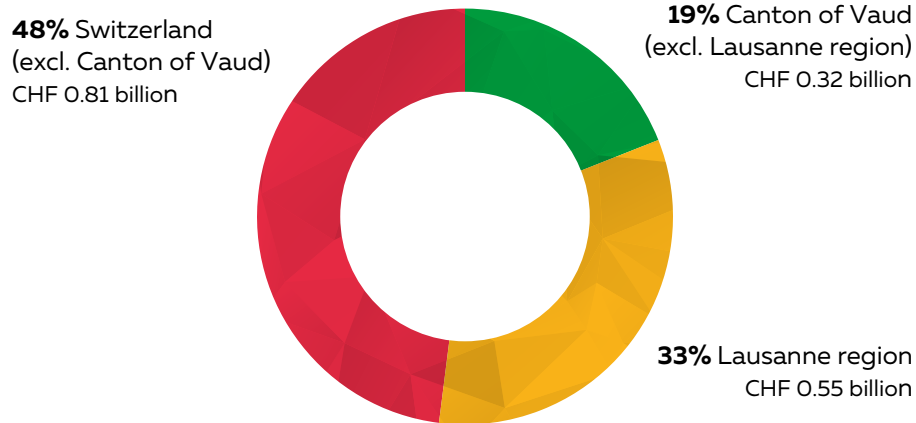


Figure 10: Distribution per region of the yearly average overall economic impact of ISOs in Switzerland from 2014 to 2019.

More in detail, every CHF 1 spent by ISOs in the Canton of Vaud creates CHF 1.47 in the Vaud economy, which equals 47% in added value. Every CHF 1 spent by ISOs in the Lausanne region creates CHF 1.32 in the Lausanne economy, which equals 32% in added value.

FIFA remains responsible for the largest part of the positive economic impact outside of the Canton of Vaud.

More than half of the average yearly overall economic impact in Switzerland is captured by the Canton of Vaud

2.3 The large share of ISOs financially supported by the IOC

As a not-for-profit association, the IOC redistributes 90% of its revenues to the organisation of the Olympic Games and to the development of sport worldwide. This includes a yearly average of CHF 157 million given to ISOs and other sports-related organisations in Switzerland. The IOC and its financially supported ISOs account for 82% of the overall economic impact.

The IOC and FIFA are responsible for most of this impact. Similarly, UEFA represents the largest share of the impact created by ISOs that are not financially supported by the IOC.

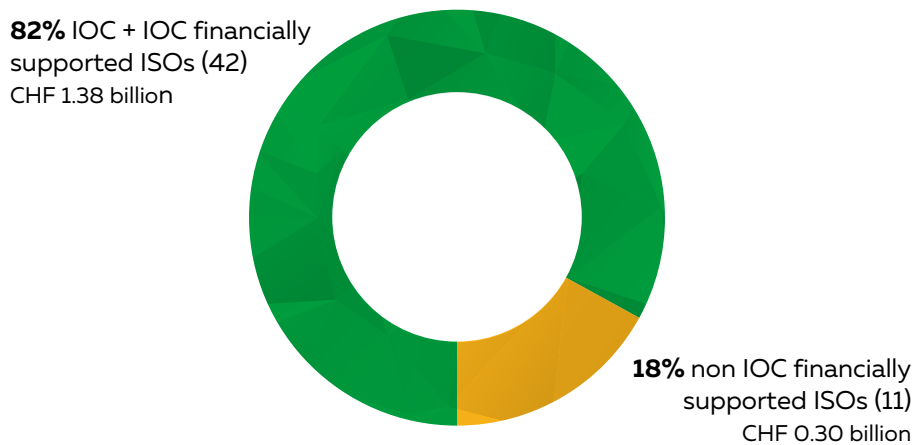


Figure 11: Distribution per type of ISO of the yearly average overall economic impact of ISOs in Switzerland from 2014 to 2019.

The IOC and FIFA are responsible for most of this impact, while UEFA represents most of the impact created by ISOs that are not financially supported by the IOC

3 The impact on direct employment

3.1 Number of employees

The number of employees includes permanent full-time and part-time staff. It is not to be confused with the number of equivalent full-time employees and does not include consultants.

The 53 ISOs that responded to our request for data employed 3,343 people in Switzerland in 2019, with more than three quarters working for the IOC or its financially supported ISOs. In 2019, approximately, 75% of these employees work for FIFA, the IOC and UEFA. They represent the ISOs in Switzerland that hire the most employees. Out of 3,343 employees, about 1,836 lived in the Canton of Vaud, of whom 996 resided in the Lausanne region.

The 53 responding ISOs employed over 3,343 people in Switzerland in 2019

Between 2013 and 2019, average annual employees increased by an annual compounded rate of around 7.8%. As displayed in Figure 12, this growth corresponds to an increase from 2,152 to 3,343 employees over six years. This is mainly due to the development of existing ISOs, as well as by the constitution of new ISOs and the relocation of some ISOs to Switzerland and Lausanne in particular, including:

- WBF, World Bridge Federation, in Lausanne since 2015
- WDSF, World Dance Sport Federation, in Lausanne since 2015
- ThinkSport, created in Lausanne in 2017
- ITA, International Testing Agency, created in Lausanne in 2018

Most employees reside near their workplace. In particular, ISOs domiciled in the Lausanne region report more than 85% of their employees residing in the same region, suggesting that the Lausanne region benefited significantly from this increase. More in detail, results show that there has been a 24% increase in the number of Lausanne region residents employed by ISOs, corresponding to an increase from 806 to 996 between 2014 and 2019.

It is worth mentioning that indirect employment is also created through the activity generated by ISOs when purchasing goods and services or undertaking construction projects. However, indirect employment cannot be estimated with enough precision for this report.

Total number of employees

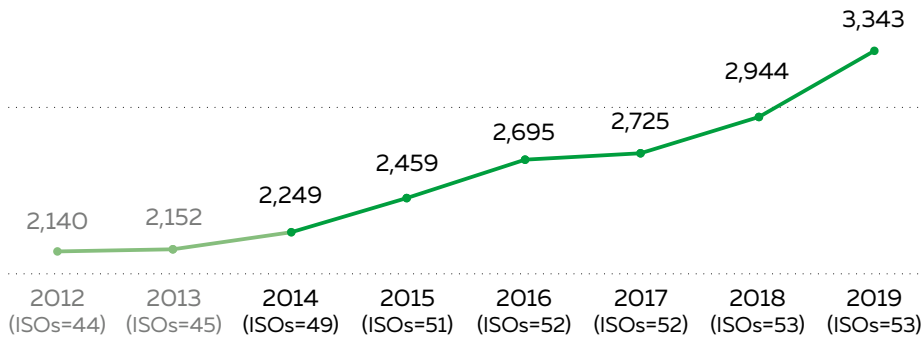


Figure 12: Evolution of the number of ISOs' employees in Switzerland from 2014 to 2019. Values for 2012 and 2013 result from the previous AISTS Study 2008–2013.

3.2 Salaries, social contributions and income tax

Nearly 22% of the overall economic impact of ISOs in Switzerland lies in the direct impact of salaries and social contributions as detailed previously (see chapter 2 "The overall economic impact"). This represents an average yearly impact of close to CHF 381 million.

Nearly 22% of the overall economic impact of ISOs in Switzerland lies in the direct impact of salaries and social contributions

The direct impact mostly corresponds to the effect of salaries and social security contributions on local residents. The study takes into consideration salaries and social contributions paid by ISOs, as well as by the construction and tourism sectors as a result of the activity generated by ISOs.

In 2019, the total amount of income tax paid by ISOs' employees residing in the Canton of Vaud was estimated at CHF 57 million

A portion of those salaries and social contributions expenditures are given to the state through income tax. In 2019, the total amount of income tax paid by ISOs' employees residing in the Canton of Vaud was estimated at CHF 57 million⁵. This amount covers all three income taxes: municipal, cantonal and federal.

Another part of those salaries and social contribution expenditures take the form of investment into pension funds by the employer and the employee. The 50 ISOs that provided data on their pension funds (including FIFA, the IOC and UEFA) contribute to their employees' pension funds with more than CHF 33 million each year.

⁵ Estimation provided by the Finance Department of the Administration cantonale des impôts of the Canton of Vaud.

4 The impact on business tourism

4.1 Number of visitors

ISOs organise a considerable number of meetings and non-sporting events with external visitors, such as boards, commissions, seminars, workshops and training events.

A yearly average of more than 44,600 overnight visits to Switzerland

A yearly average of more than 44,600 overnight visits to Switzerland have been reported. About 64% of these visits are hosted in the Canton of Vaud, including the Lausanne region.

Similarly to prior study, only visitors coming from outside the region of the events are considered as having an economic impact on the reference area. Following Nassar & Stricker (2007), Preuss & Weiss (2003) and Barget (2001), the visitors living in the area should not be counted since it can be assumed that they would have spent their money in the reference area anyway.

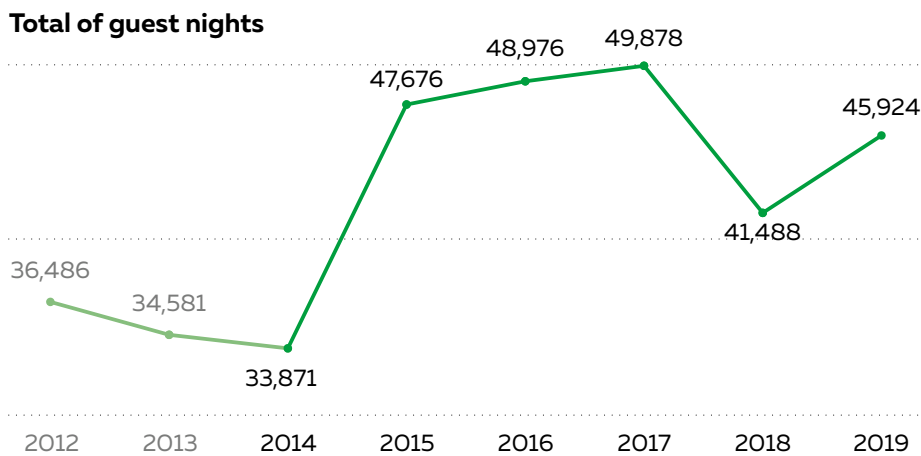


Figure 13: Evolution of the number of ISOs' guest nights from 2014 to 2019. Values for 2012 and 2013 result from the previous AISTS Study 2008–2013.

4.2 Expenses of visitors

Visitors' spending is part of the economic impact generated by ISOs, whether expenses are covered by the organisation or by the individual. For the purpose of calculating the overall economic impact, expenses covered by the organisation were captured as part of an ISO's expenditures. In the case of expenses covered by the individual participant, the estimated daily expenditure of a business tourist in Switzerland is CHF 282. This estimate is in accordance with assessment of the Lausanne Tourism Board (Lausanne Tourisme) and is consistent with the one used in the previous AISTS economic impact study, thus allowing unbiased comparability with prior estimation. Distribution of guest-related expenditures is maintained similar to previous study: 20% on lodging, 9% on food and beverages and 71% on miscellaneous retail.

Each CHF 1 spent by visitors
on the local Swiss economy
created CHF 2.34

Based on the methodology applied in this study, the primary income generated by visitors, the induced impact, and consequently the overall economic impact are calculated. The yearly average overall economic impact generated by visitors is thus estimated to be CHF 29 million. This amount includes direct, indirect and induced impacts⁶. Overall, each CHF 1 spent by visitors on the local Swiss economy created CHF 2.34. Expenses incurred by Olympic Museum visitors – such as hotels – are ignored, as the museum is not considered to be necessarily the main objective of a visitor's stay in Lausanne. The income generated by entry ticket sales is accounted for as part of the IOC revenue.

⁶ See sections 1.4.4 and 1.4.5 for detailed explanation of calculation of direct, indirect and induced impacts.

5 The impact on the construction sector

While it is not the main source of economic impact, the construction sector benefits considerably from the activity of ISOs in Switzerland, with the creation of CHF 1.83 for each CHF 1 spent in this sector.

Each CHF 1 spent in the construction sector created CHF 1.83

Together, ISOs spent CHF 292 million between 2014 and 2019 in construction work (including renovation), with capital expenditures being distributed relatively equally over the six years. Construction investments can be mainly attributed to coinciding building projects undertaken by IOC (building of the new IOC headquarter), FIFA (renovation and building of the FIFA museum), EA, FIG, and UEFA during the period examined.

Most costs are incurred within Switzerland through local contractors, which leads to substantial added value and an important overall economic impact. Over the six years, the overall economic impact in the construction sector amounted to about CHF 534 million. The Canton of Vaud, including the Lausanne region, benefits from 53% of the impact, while the rest of the Swiss economy (mostly the region of Zurich), benefited from the remaining 47% of this impact.

6 The impact on perception

A survey was conducted to measure the intangible impact of the IOC on Switzerland. Survey results capture an important part of the overall impact of ISOs that goes well beyond what is tangible. The survey was conducted by the Link Institute between 9 and 24 August 2021 using the Computer-Assisted Web Interviewing method and a stratified random sample based on the Link SwissTrend Online (Omnibus).

From 1,280 interviewed individuals, 514 residents were from the French part of Switzerland and 766 residents were from the German part. A balanced sample of residents was used to correct the preponderance of residents living in the German-speaking part of Switzerland, since the majority of ISOs are located in the French part of the country. The total result is weighted to reflect the actual stratification of the Swiss population. Individuals were selected to accurately reflect the existing 15- to 79-year-old population in terms of gender, age and professional activity. Interviewees were asked four questions in their own language (French or German) about the intangible impact of the IOC and ISOs in Switzerland⁷.

77% of respondents residing in Romandy consider it economically important to host the IOC in Lausanne

The results⁸ show that 77% of respondents residing in the French-speaking part of Switzerland consider it economically important to host the IOC in Lausanne.

98% of respondents residing in the Canton of Vaud and 75% of respondents residing in Switzerland are aware that the IOC has its headquarter in Lausanne. Moreover, French-speaking respondents are more aware (93%) of the IOC location in Lausanne than German-speaking respondents (69%).

Respondents report their sense of pride in having the IOC headquarter in Switzerland. Indeed, over 75% of respondents agree with the statement "I am proud that the headquarters of the IOC are based in Switzerland."

Over 80% of French-speaking respondents agree that the title 'Olympic Capital' is important for Lausanne

The results also show that the City of Lausanne's title of 'Olympic Capital' is important to Swiss residents. In particular, more than 80% of French-speaking residents agreeing that this title is important for Lausanne.

⁷ Cf. Appendix 2 "Link institute survey questionnaire (French)" and Appendix 3 Link "Institute survey questionnaire (German)".

⁸ Cf. Appendix 4 "Link institute survey summary of results".

7 Conclusion

The AISTS successfully collected data from 53 out of the 58 ISOs with a physical presence in Switzerland, including the IOC. The data was requested for each year from 2014 to 2019 and for each region: the Lausanne region, the Canton of Vaud, and Switzerland. This data was collected with considerable effort by ISO executives and their human resource as well as financial departments of the 53 responding ISOs.

Together, the ISOs and their visitors spent an average of CHF 1.10 billion within Switzerland each year. This spending generated an average yearly economic impact of CHF 1.68 billion for Switzerland, CHF 0.87 billion for the Canton of Vaud and CHF 0.55 billion for the Lausanne region. This economic impact has a positive effect on employment, business tourism, and the construction sector.

The economic impact calculated here can be considered a conservative estimate for four main reasons. First, the study did not consider the money spent by all accompanying guests of ISO visitors or the money spent by visitors to the Olympic Museum, except for entry tickets. Second, missing data from ISOs was replaced by historical comparable data when applicable. Third, conservative multipliers were used to estimate the indirect and induced impacts. Finally, the economic impact of international sports events in Switzerland – some of which can be attributed to the ISOs' presence – were not included in the scope of the study.

A survey was also conducted to measure the intangible impact of the IOC in Switzerland. Survey results capture an important part of the overall impact of ISOs that goes well beyond what is tangible. The results confirm that Swiss residents, and residents in the Canton of Vaud in particular, are not only well aware of the presence of the IOC in Lausanne but also consider this presence economically important.

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Appendices

Appendix 1: Yearly, total and yearly average overall economic impact of ISOs per region and type of impact

Appendix 2: Link Institute survey questionnaire (French)

Appendix 3: Link Institute survey questionnaire (German)

Appendix 4: Link Institute survey summary of results

Appendix 1

Yearly, total and yearly average overall economic impact of ISOs per region and type of impact

Impact, in CHF		Lausanne region	Canton of Vaud	Switzerland
2014	Direct impact	103,440,647	180,045,586	356,533,541
	Indirect impact	179,240,400	200,159,953	403,599,454
	Induced impact	404,233,897	551,495,880	1,125,186,339
	Overall impact	686,914,944	931,701,419	1,885,319,335
2015	Direct impact	93,358,187	179,115,538	335,964,082
	Indirect impact	60,987,044	87,094,396	216,201,424
	Induced impact	220,713,680	389,629,382	821,422,295
	Overall impact	375,058,911	655,839,316	1,373,587,800
2016	Direct impact	124,697,804	257,719,538	412,222,573
	Indirect impact	149,283,683	172,264,407	304,619,439
	Induced impact	391,793,527	627,357,237	1,060,512,920
	Overall impact	665,775,015	1,057,341,182	1,777,354,932
2017	Direct impact	121,361,752	213,320,631	355,127,979
	Indirect impact	47,169,505	74,293,892	212,861,168
	Induced impact	240,999,698	420,815,429	844,181,113
	Overall impact	409,530,955	708,429,952	1,412,170,260
2018	Direct impact	133,595,262	233,682,590	402,287,120
	Indirect impact	138,846,456	167,173,040	390,434,858
	Induced impact	389,591,657	583,496,664	1,175,214,849
	Overall impact	662,033,375	984,352,294	1,967,936,828
2019	Direct impact	151,671,951	266,090,104	423,138,472
	Indirect impact	55,140,495	99,720,086	252,443,501
	Induced impact	295,741,798	535,828,391	1,003,583,783
	Overall impact	502,554,244	901,638,581	1,679,165,756
Total 2014 –2019	Direct impact	728,125,604	1,329,973,985	2,285,273,767
	Indirect impact	630,667,583	800,705,775	1,780,159,844
	Induced impact	1,943,074,257	3,108,622,983	6,030,101,299
	Overall impact	3,301,867,444	5,239,302,744	10,095,534,911
Yearly average 2014 –2019	Direct impact	121,354,267	221,662,331	380,878,961
	Indirect impact	105,111,264	133,450,962	296,693,307
	Induced impact	323,845,709	518,103,831	1,005,016,883
	Overall impact	550,311,241	873,217,124	1,682,589,152

Appendix 2

Link Institute survey questionnaire (French)

141005 Questionnaire

<00100>

Selon vous où se trouve le siège du Comité international olympique?
Diriez-vous...

ENQ : lire

EDV : RANDOM , SINGLE ANSWER

<1> A Genève

<2> A Zürich

<3> A Lausanne

<4> A Berne

<5> Ailleurs en Suisse

<9> Ne se prononce pas

<00100> EDV: Only if code <1>,<2>,<4>,<5>,<9> in <00100>

Le siège du Comité international olympique se trouve à Lausanne.

<00200>

En utilisant une échelle de note de 1 à 5 – 5 signifiant que vous êtes tout à fait d'accord avec les phrases que je vais vous lire, et 1 que vous n'êtes pas du tout d'accord, les notes intermédiaires vous permettant de nuancer votre jugement – veuillez noter les phrases suivantes :

<1> Pas du tout d'accord

<2-4> Nuance

<5> Tout à fait d'accord

<9> NSP

ENQ : LIRE

EDV : RANDOM

<1. Je suis fier que le siège du CIO soit en Suisse

<2. Il est important que la Suisse accueille les organisations sportives internationales

<3. Le titre de Capitale Olympique est important pour Lausanne

Source: Link Institute, Lausanne, 2021.

Appendix 3

Link Institute survey questionnaire (German)

141005 Fragebogen

<00100>

Wo befindet sich Ihrer Meinung nach der Sitz des Internationalen Olympischen Komitees? Würden Sie sagen ...

ENQ : Vorlesen

EDV : RANDOM , SINGLE ANSWER

- <1> In Genf
- <2> In Zürich
- <3> In Lausanne
- <4> In Bern
- <5> An einem anderen Ort in der Schweiz
-
- <9> Äussert sich nicht dazu

<00100> EDV: Only if code <1>,<2>,<4>,<5>,<9> in <00100>

Der Sitz des Internationalen Olympischen Komitees befindet sich in Lausanne.

<00200>

Bitte beurteilen Sie die folgenden Aussagen anhand einer Skala von 1 bis 5. 5 bedeutet, dass Sie der Aussage, die ich Ihnen vorlese, voll und ganz zustimmen, und 1 bedeutet, dass Sie ihr ganz und gar nicht zustimmen. Mit den Noten dazwischen können Sie Ihr Urteil abstufen:

-
- <1> Stimme ganz und gar nicht zu
- <2-4> Abstufung
- <5> Stimme voll und ganz zu
- <9> Ich weiss es nicht
-

ENQ : VORLESEN

EDV : RANDOM

- <1. Ich bin stolz darauf, dass der Sitz des IOK in der Schweiz ist
- <2. Es ist wichtig, dass die Schweiz die internationalen Sportorganisationen beherbergt
- <3. Der Titel Olympische Hauptstadt ist für Lausanne wichtig

Source: Link Institute, Lausanne, 2021.

Appendix 4

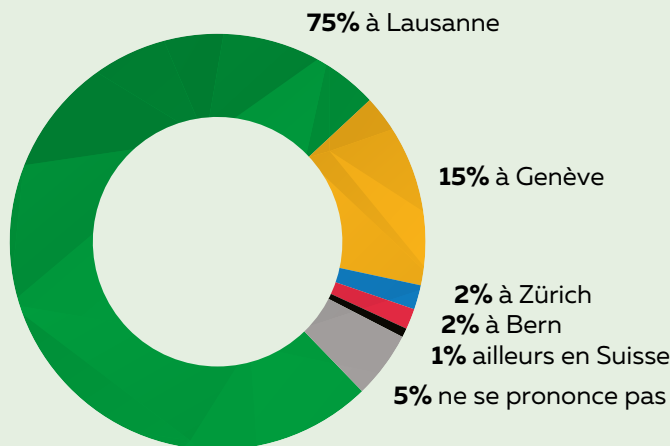
Link Institute survey summary of results

Notes

- 1,280 individuals were interviewed: 514 residents from the French part of Switzerland and 766 residents from the German part of Switzerland.
- A balanced sample of residents was obtained to correct the preponderance of residents living in the German-speaking part of Switzerland, since the majority of ISOs are located in the French part of Switzerland.
- Total result is weighted to reflect the actual stratification of the Swiss population.
- VD stands for the 'Canton of Vaud'.

Localisation du CIO

Q201 | Selon vous où se trouve le siège du Comité international olympique?
Diriez-vous...

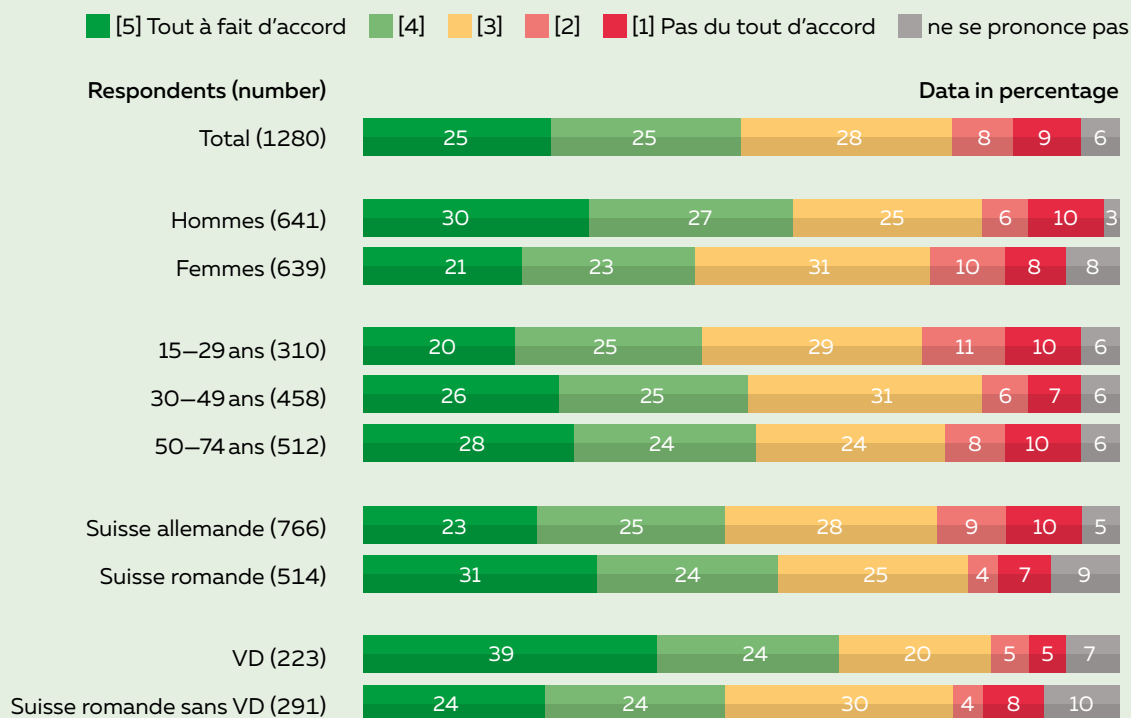


Source: Link Institute, Lausanne, 2021

Perception du CIO

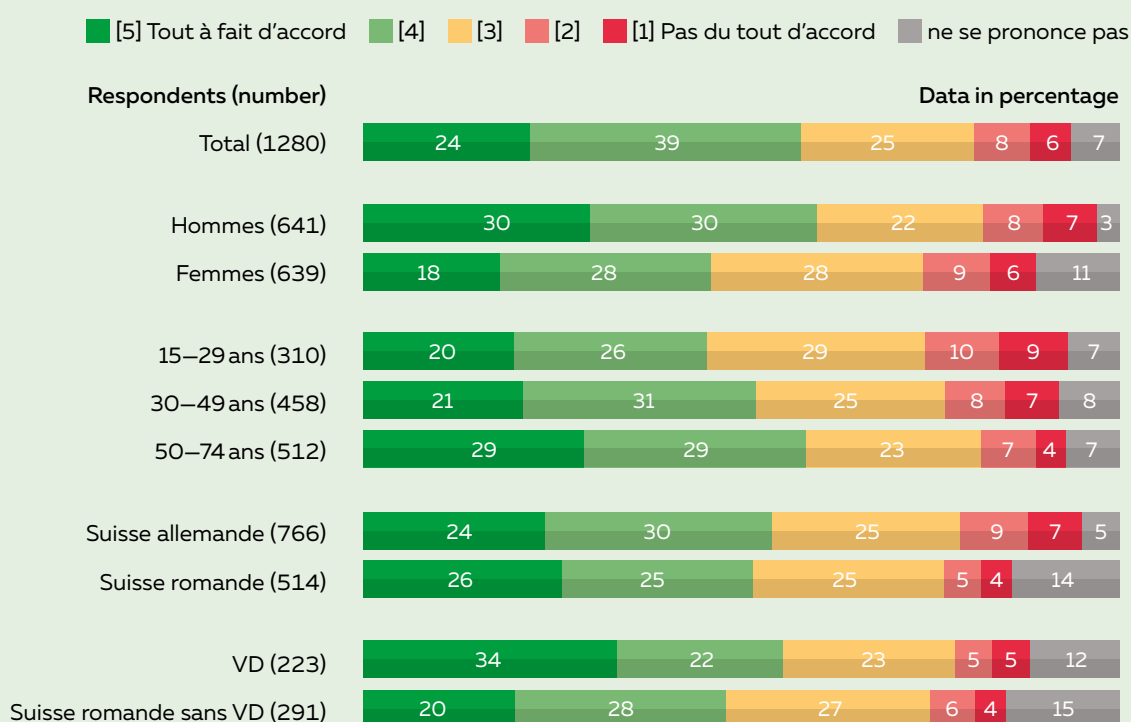
Q202 | En utilisant une échelle de note de 1 à 5 – 5 signifiant que vous êtes tout à fait d'accord, et 1 que vous n'êtes pas du tout d'accord – veuillez noter les phrases suivantes :

1. « Je suis fier que le siège du CIO soit en Suisse »



Source: Link Institute, Lausanne, 2021

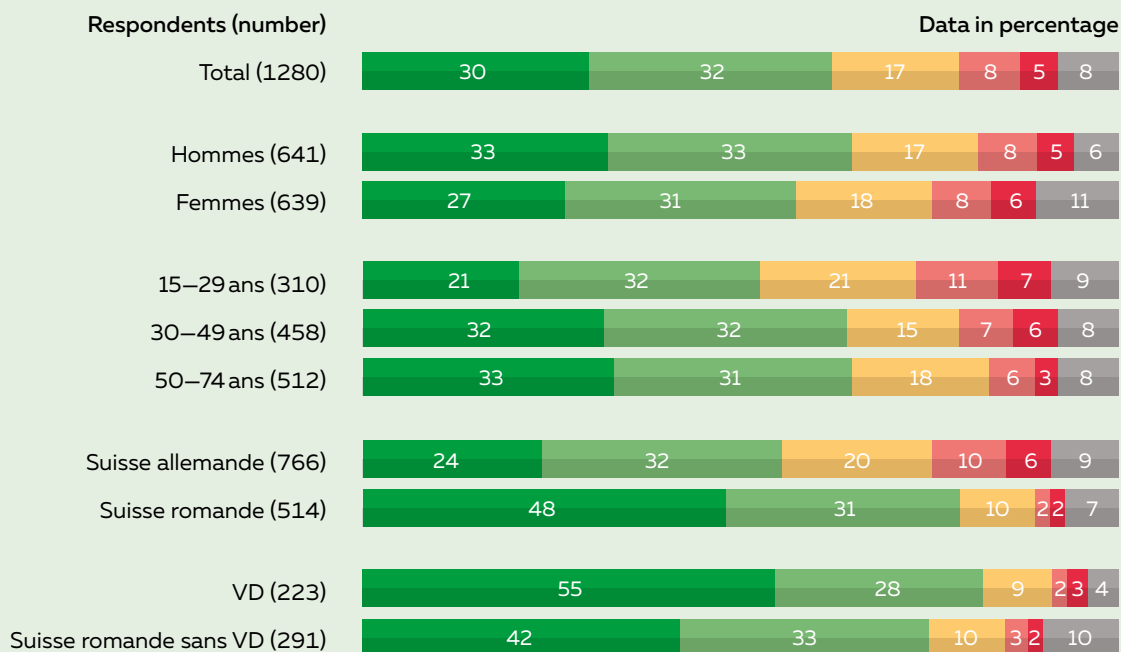
2. « Il est important que la Suisse accueille les organisations sportives internationales »



Source: Link Institute, Lausanne, 2021

3. « Le titre de Capitale Olympique est important pour Lausanne »

■ [5] Tout à fait d'accord ■ [4] ■ [3] ■ [2] ■ [1] Pas du tout d'accord ■ ne se prononce pas



Source: Link Institute, Lausanne, 2021

About the AISTS

The International Academy of Sports Science and Technology (AISTS), is committed to professionalising sports management through the three core activity areas of continuing education, applied research and providing an engaging platform for industry connections.

Founded as a not-for-profit organisation in 2000, the AISTS's Founding Members – the International Olympic Committee, the EPFL, the University of Lausanne, the University of Geneva, IMD Business School, Ecole hôtelière de Lausanne, the City of Lausanne and the Canton of Vaud – all recognise the importance of meeting the evolving knowledge needs of today's sports managers.

Through its education services, the AISTS prepares tomorrow's international sports managers with the Master in Sports Administration and Technology (AISTS MSA) held each year in Lausanne; provides professional development opportunities to international sport organisations; and onsite training for major event organisers.

The AISTS's applied research arm conducts independent and commissioned projects, in addition to helping sports organisations and federations navigate an increasingly complex sport landscape through advisory services. The AISTS areas of focus line principally in major sport events, international sport administration and management, business and development of sport, as well as sport for social and economic impact.

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