"A time to make friends™“

The 2006 FIFA World Cup™
and its effect on the image and economy of Germany
Before the 2006 FIFA World Cup™ took place, 81.7 per cent of people in Germany thought the country was the right choice to host the event. What impact did they expect it to have on their own town or city?

**HOW THE GERMAN POPULATION SAW IT**

How much of the World Cup atmosphere could they already sense in Germany?

- 70%
- 60%
- 50%
- 40%
- 30%
- 20%
- 10%
- 0%

- Increased/improved
- Image
- Revenue
- Tourism
- Infrastructre
- Events
- No increase/improvement

Source: Prof. Alfons Madeja – Survey of Germans at the 2005 FIFA Confederation Cup in Germany

**INVESTMENT AND OPPORTUNITY**

**Economic impact of the 2006 FIFA World Cup™**

The German government estimates the overall value to the economy of World Cup-induced activity to be around three billion euros, spread over a period of at least three years. The event is predicted to create 50,000 new jobs, which are expected to generate additional economic value of about 15 billion euros in 2007 and 2008, and to increase tax receipts by around 600 million euros.

Source: seventh progress report by the German federal government in preparation for the 2006 FIFA World Cup™

**The impact of foreign visitors to Germany**

<table>
<thead>
<tr>
<th>Scenario in billion euros</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross domestic product</td>
<td>1.25</td>
<td>0.37</td>
<td>0.03</td>
<td>1.65</td>
</tr>
<tr>
<td>of which consumer spending</td>
<td>0.52</td>
<td>0.39</td>
<td>0.07</td>
<td>0.98</td>
</tr>
<tr>
<td>Capital investment</td>
<td>0.13</td>
<td>0.05</td>
<td>-0.04</td>
<td>0.14</td>
</tr>
<tr>
<td>Exports</td>
<td>1.02</td>
<td>0.04</td>
<td>0.01</td>
<td>1.07</td>
</tr>
<tr>
<td>Imports</td>
<td>0.42</td>
<td>0.11</td>
<td>0.00</td>
<td>0.53</td>
</tr>
<tr>
<td>Tax revenue</td>
<td>2.32</td>
<td>0.58</td>
<td>0.04</td>
<td>2.94</td>
</tr>
<tr>
<td>Steueraufkommen</td>
<td>0.286</td>
<td>0.089</td>
<td>0.013</td>
<td>0.388</td>
</tr>
<tr>
<td>Workforce</td>
<td>14,539</td>
<td>47</td>
<td>1,180</td>
<td>15,766</td>
</tr>
</tbody>
</table>

Source: GNTB, GWS, Nov. 2005

**How Germany can capitalise on the 2006 FIFA World Cup™ to improve its image as a travel destination**

The 2006 FIFA World Cup™ presents numerous opportunities for promoting Germany as a travel destination. The German National Tourist Board (GNTB) expects the event to attract a total of around five million additional overnight stays by domestic and international visitors. The huge numbers of football fans expected to visit Germany is further bolstered by the participation of so many neighbouring countries, in particular the three most populous, France, the Netherlands and Poland. High-spending target groups from the USA, Japan and Saudi Arabia will also be coming to Germany to cheer on their teams. With its comprehensive transport infrastructure, Germany is well equipped to deal with the influx, boasting an array of international airports including the two important hubs of Frankfurt and Munich.

Source: GNTB forecasts, Nov. 2005
How do you expect Germany to benefit from hosting the 2006 FIFA World Cup™?

- Good advertisement for the country
- Boost to the tourism industry
- Improved relations with people from abroad
- Better stadiums
- Get more young people interested in football
- More people going to live games

Source: University of Hohenheim, Marketing Reports: Acceptance levels and assessment of the 2006 FIFA World Cup™ among the German people

Awareness of where the 2006 FIFA World Cup™ is taking place (unprompted poll)

Source: GNTB/TNS Infratest: random, cross-sectional study of 1,000 people in each of the seven countries, Nov. 2005

Around six months before the 2006 FIFA World Cup™ kicked off, the proportion of those surveyed who know that the tournament is being held in Germany ranges from 40 per cent (Italy) to 64 per cent (Netherlands). In Germany, the proportion of the population with a moderate to strong interest in the 2006 FIFA World Cup™ is just over 40 per cent. Interest is particularly high in the traditional footballing countries of Brazil and France.

What have you heard about the 2006 FIFA World Cup™ so far?

<table>
<thead>
<tr>
<th>Location of the stadiums</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>25%</td>
<td>54%</td>
<td>46%</td>
<td>45%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Ticket prices/how to buy tickets</td>
<td>2%</td>
<td>1%</td>
<td>5%</td>
<td>7%</td>
<td>56%</td>
</tr>
<tr>
<td>Logo/mascot</td>
<td>2%</td>
<td>16%</td>
<td>11%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Security measures</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Football Globe tour</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: University of Hohenheim, Marketing Reports: survey in the run-up to the 2006 FIFA World Cup™

INTEREST IN FOOTBALL

Can you see yourself watching any of the World Cup games on giant screens in city centres and town squares?

Source: University of Hohenheim, Marketing Reports: series of surveys in the run-up to the 2006 FIFA World Cup™

2001 2002 2003 2004 2005

Location of the stadiums
Ticket prices/how to buy tickets
Logo/mascot
Security measures
Football Globe tour

Source: University of Hohenheim, Marketing Reports: survey in the run-up to the 2006 FIFA World Cup™

How interested in football are people in Germany?

<table>
<thead>
<tr>
<th></th>
<th>very interested</th>
<th>just interested</th>
<th>not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>57%</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>Women</td>
<td>15%</td>
<td>33%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Source: Sportfive – marketing and market research: Sportprofile, Allensbach Market and Media Analysis 2005
The aim of opening Germany up to new groups of customers has been achieved. Three quarters of those surveyed had come to Germany specially for the 2006 FIFA World Cup™ and for almost half of respondents this was their first visit (43 per cent). The long-term effect and lasting impact of this major sporting event is borne out by the fact that 16 per cent combined their visit with a holiday in Germany and 10 per cent used the World Cup as an opportunity to visit friends and family.

Increase in overnight stays June/July 2006

% change in overnight stays in the host cities in June 2006


Source: Bangerth 2007, based on data from the regional statistical agencies
<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage of available tickets</th>
<th>Number of tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>58.6</td>
<td>1,263,154</td>
</tr>
<tr>
<td>Participating countries with the most spectators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great Britain and Northern Ireland</td>
<td>3.9</td>
<td>83,288</td>
</tr>
<tr>
<td>USA</td>
<td>3.2</td>
<td>70,005</td>
</tr>
<tr>
<td>Japan</td>
<td>2.9</td>
<td>62,046</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2.8</td>
<td>59,469</td>
</tr>
<tr>
<td>Sweden</td>
<td>2.6</td>
<td>55,788</td>
</tr>
<tr>
<td>Other participating countries</td>
<td>21.5</td>
<td>463,280</td>
</tr>
<tr>
<td>Non-participating countries with the most spectators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>0.7</td>
<td>14,153</td>
</tr>
<tr>
<td>Canada</td>
<td>0.5</td>
<td>9,908</td>
</tr>
<tr>
<td>Finland</td>
<td>0.3</td>
<td>6,182</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.2</td>
<td>5,387</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>0.2</td>
<td>4,482</td>
</tr>
<tr>
<td>Other non-participating nations</td>
<td>2.7</td>
<td>57,913</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>2,155,055</td>
</tr>
</tbody>
</table>

Source: 2006 Organising Committee and Holger Preuß: The impact of major sporting events on the tourism economy
FOOTBALL FEVER IN GERMANY

Around 21 million people visited the Fifa Fan Fests in the twelve host cities, exceeding all expectations of how many the public screenings and “Fan Miles” would attract. By the middle of the tournament, some cities had to expand the areas they had set aside. Nine million people came to Berlin alone, the first time an event in Germany recorded more visitors than the Oktoberfest, the largest public festival in the world. Three million people went to the Fifa Fan Fest in Cologne and around 1.9 million did the same in Frankfurt.

How do you rate the atmosphere in Germany?

The German people have given me a friendly welcome.

95 per cent of those surveyed found the majority of German people to be friendly.

Source: Johannes Gutenberg University of Mainz – Survey of international fans in Kaiserslautern during the 2006 Fifa World Cup™

Do you think the World Cup slogan “A time to make friends™” holds true?

91 per cent of those surveyed thought that the World Cup slogan held true.

Source: Prof. Alfons Madeja – Report on the World Cup concept

Would you now recommend Germany as a travel destination?

88 per cent of visitors to Germany would either probably or definitely recommend the country as a travel destination.

Source: GNTB/TNS Infratest – visitor survey
**VERDICT**

- **Tourism**: 5.1 from a max. of 7 points (4.6, 2005)
- **People**: 4.9 from a max. of 7 points (5.9, 2005)
- **Culture and Heritage**: 5.1 from a max. of 7 points (4.6, 2005)
- **Exports**: 5.3 from a max. of 7 points (4.9, 2005)
- **Governance**: 4.9 from a max. of 7 points (6.2, 2005)
- **Investment and Immigration**: 4.9 from a max. of 7 points (4.4, 2005)

By 2007, Germany had risen 3 places to 1st in a worldwide image comparison.

**Image of "Destination Germany"**

- Germany’s core strengths confirmed in the second stage of the survey:
  - quick and easy to get to (from the European source markets)
  - varied and beautiful natural scenery
  - fascinating places of historical interest
  - good shopping
  - good hotels

- As expected, Germany was able to enhance its image as an “ideal venue for international sporting events” (e.g. up 8 percentage points in France and 12 in Italy).

- Germany’s image improved significantly in Italy and Brazil, and, more unexpectedly, in France and the Netherlands.

**Source:** GNTB/TNS Infratest 2006

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**IMAGE BOOST**

Interest in the 2006 FIFA World Cup™

<table>
<thead>
<tr>
<th>Country</th>
<th>1st wave</th>
<th>2nd wave</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>67%</td>
<td>64%</td>
</tr>
<tr>
<td>Germany</td>
<td>69%</td>
<td>72%</td>
</tr>
<tr>
<td>Brazil</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>China</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Japan</td>
<td>50%</td>
<td>48%</td>
</tr>
<tr>
<td>Argentina</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Russia</td>
<td>54%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Awareness of the FIFA World Cup Host Cities

- Berlin (94%)
- Munich (92%)
- Frankfurt (89%)
- Cologne (88%)
- Stuttgart (79%)
- Nuremberg (73%)
- Hannover (73%)
- Dortmund (68%)
- Leipzig (62%)
- Kaiserslautern (59%)
- Gelsenkirchen (40%)
- Cologne (37%)

**Source:** GNTB/TNS Infratest – Image Boost, Nov. 2005, Sep./Oct. 2006

Berlin is the best-known city in Germany (94 per cent), ahead of Munich (92 per cent), Frankfurt (89 per cent) and Hamburg (88 per cent). The 2006 FIFA World Cup™ raised the international profile of the lesser known host cities, such as Dortmund (up seven percentage points), Kaiserslautern and Gelsenkirchen (both up six percentage points). Awareness of a host city among supporters of national teams due to play a match in that city was often seen to increase. The Brazilian team played in Dortmund twice during the tournament, and Brazilian respondents’ awareness of the city rose by 20 percentage points to 36 percentage points. Similarly, France played in Hannover and awareness of the city rose by 18 per cent among the French.

**Source:** GNTB/TNS Infratest – Image Boost, Nov. 2005, Sep./Oct. 2006

Germany rolled out the red carpet for its guests

- 79 per cent believe that the Germans’ attitude to their country has improved
- Almost 100,000 workers in the tourism industry became conscious of the value of intercultural awareness during the various activities
- Worldwide, in the twelve years preceding the summer of 2006, the GNTB communicated the 2006 FIFA World Cup™ and Destination Germany to 75 million internet users, in 25 million print products, on 5,000 fact-finding tours and at around 1,000 trade fairs.
- In 2006, Germany far exceeded its target of 5 million additional overnight nights from domestic and foreign visitors, generating 7.2 million more than the previous year. Overnight stays rose by a further 3 per cent to 10.6 million in 2007.

Economic success

- 2.5 million more overnight stays by visitors from abroad in the first half of 2006: up 1.4 million in June 2006 (31 per cent increase), and 600,000 in July 2006 (11 per cent increase); total overnight stays from January to July up 3.5 million
- 8 per cent increase in overnight stays in towns with populations both over and under 100,000 in 2006
- Hotel prices increased by 3.4 per cent in June 2006, retail trade rose by 1.9 per cent on May 2006 and transport services saw substantial growth.
- Second-quarter GDP growth up by 2.4 per cent on same prior-year period, 185,000 additional jobs nationwide

Source: GNTB, Federal Statistical Office 2006 and others