



Report

Host Country Impact

Holistic assessment of the impact of the UEFA EURO 2024 on its Host Country



Expertise by Nielsen Sports – August 2024



Nielsen Sports analyzes the monetary impact of the UEFA EURO 2024

Initial situation & approach



Initial situation

UEFA EURO 2024 is one of the most prestigious competitions in international football. Many people have fond memories of Germany hosting such a major football event, with the 2006 FIFA World Cup being remembered by many as the "Sommermärchen".

In this context, evidence of the impact that such an event has is particularly relevant. The derivation is multi-layered and complex, which is why UEFA commissioned Nielsen Sports to determine the monetary equivalent of UEFA EURO 2024 as part of a comprehensive impact analysis.



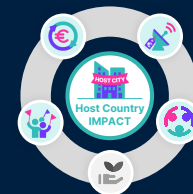
Approach

Nielsen Sports' approach is based on a retrospective analysis and includes primary research data collected through on-site surveys, cross-media monitoring and evaluation, as well as additional expertise and knowledge from 150+ Host Impact studies that were successfully carried out in the past. In addition, any existing Host Impact research and UEFA internal data were analyzed and matched with Nielsen Sports' research approach. In that sense, all relevant Host Impact levels, i.e., economic, media, social, and environmental, were analyzed based on this data set.



The UEFA EURO 2024 had a monetary impact of €7,442M on the Host Country and ten Host Cities

Host Country Impact of UEFA EURO 2024



€6,776M ECONOMIC IMPACT

through spendings inside the Host Country's economy



2.7M TICKET HOLDERS

- 44% from outside Germany
- 1.5 watched matches per person



€571M MEDIA IMPACT

generated by TV, OTT, Online, Print & Social Media coverage for the Host Cities and the Host Country



€95M SOCIAL IMPACT

through increased levels of physical activity and upskilling of volunteers

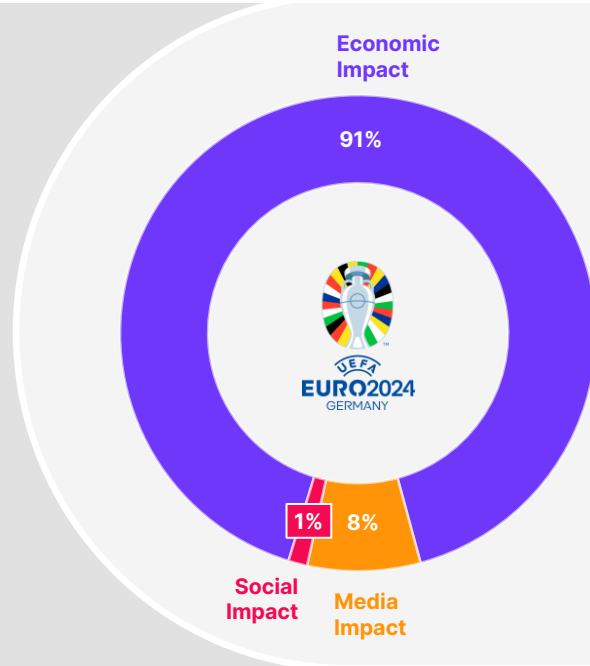


The UEFA EURO 2024 must be considered a great success due to the major impact on its Host Country Germany

Host Country Impact of UEFA EURO 2024



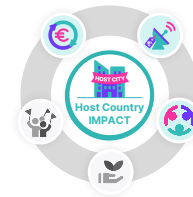
HOST COUNTRY IMPACT:
€7,442M



Summary

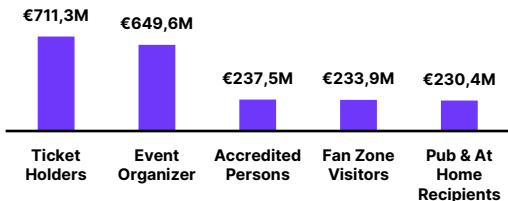
The total monetary effect generated by the Tournament in Germany and its 10 Host Cities amounts to €7,442M. Over 90% of this is generated by direct expenditure by Ticket Holders, Organizers or Accredited Persons as well as the resulting indirect and induced economic effects. The high level of media coverage generated an effect of €571M for the perception of the Host Cities and the Host Country. The Tournament also had a noticeable impact on the social system in Germany.

The main value driver of the UEFA EURO 2024 for its Host Country and related Host Cities is the impact on the economy



Host Country Impact of UEFA EURO 2024

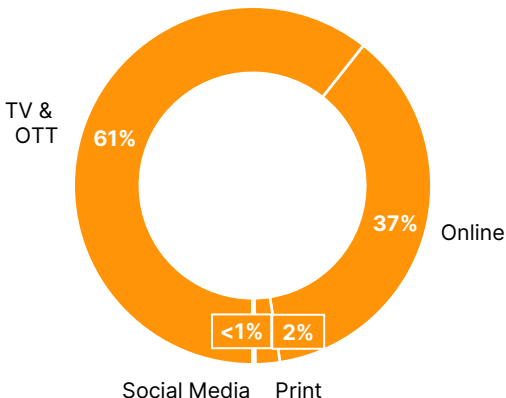
ECONOMIC IMPACT



Multiplier*
3.29 for GER



MEDIA IMPACT



SOCIAL IMPACT

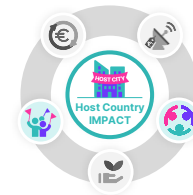


Rounding errors can apply

* Based on the theories of British economist John Maynard Keynes. Calculation is based on the country-specific Marginal Propensity to Consume (MPC), representing the share of each additional Euro of disposable income that is spent on consumption. MPC can be estimated based on key economic parameters such as disposable income and private household consumption within an economy.

Ticket Holders perceived the Tournament very positively in many respects

Host Country Impact of UEFA EURO 2024



Ticket Holders

2.7M Ticket Holders were in stadiums for the 51 matches (52k per match) of UEFA EURO 2024 - of which over 1.7M were unique Ticket Holders



Revisit

97% of Ticket Holders would like to visit Germany again, on average **79%** of Ticket Holders recommend visiting one of the Host Cities



Pride

85% of Host City residents stated that hosting UEFA EURO 2024 gave them a sense of pride



Origin

Of the Ticket Holders, **23%** came from the Host Cities, **33%** from the rest of Germany and **44%** were international Ticket Holders



Image

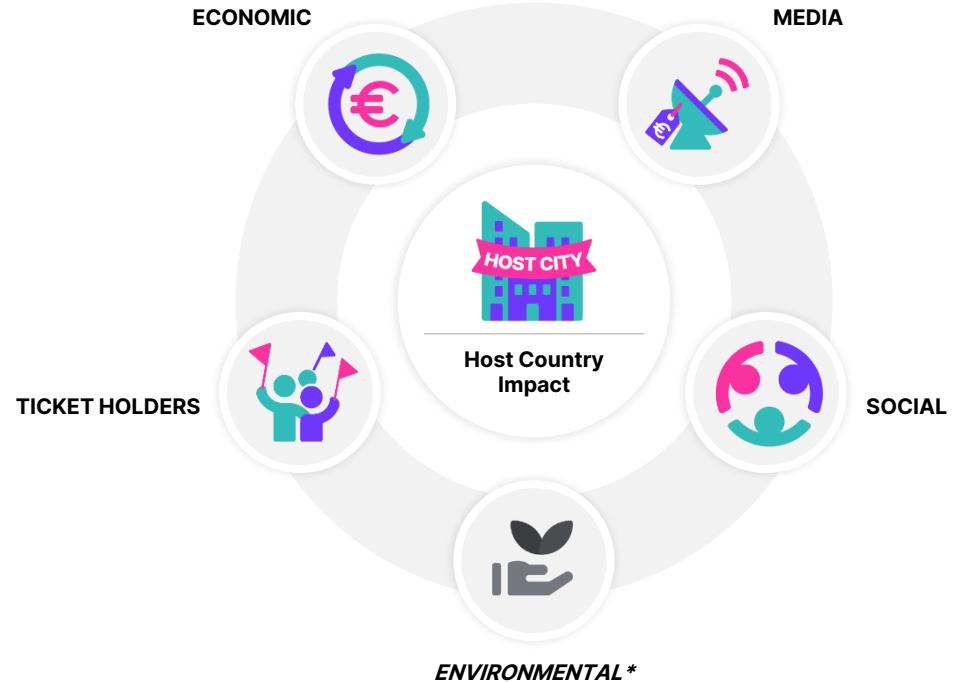
78% of Ticket Holders rate UEFA EURO 2024 with a positive image strength across several characteristics



Inspiration

Around **a quarter** of resident Ticket Holders were inspired by UEFA EURO 2024 to do an average of **2.2 hours** more sport per week

Nielsen Sports' Host Country Impact assesses the effects of the UEFA EURO 24 on its Host Country across **four** critical dimensions



* It has been decided that the environmental impact will be considered in a separate study as soon as more meaningful data and results are available.

Ticket Holders Host Country Impact

UEFA EURO 2024 Germany

The 'Ticket Holders' section provides a detailed insight into the Ticket Holders of the Tournament. This includes socio-demographic factors such as origin, age or family status, but also their perception of the Tournament and their stay in the Host Country Germany.



Over 2.7M Ticket Holders visited the 51 matches

Ticket Holders – General findings



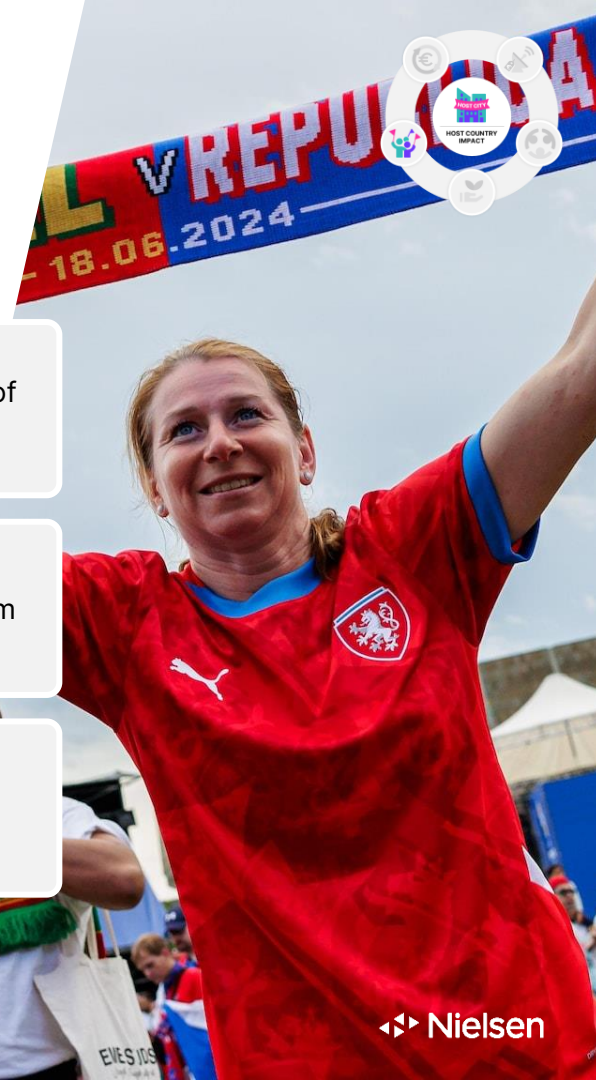
Total attendance of **2.7M Ticket Holders** spread over 51 matches consisted of over **1.7M unique Ticket Holders**



Around **745K people** attended the Tournament from outside Germany, **967K** came from the Host Country directly – in total Ticket Holders came from 119 different countries



22% of the Ticket Holders were **female** and the average age was around **43 years**



2.7M Ticket Holders were attending the UEFA EURO 2024 in Germany

Ticket Holders – Overview figures



Ticket Holder figures



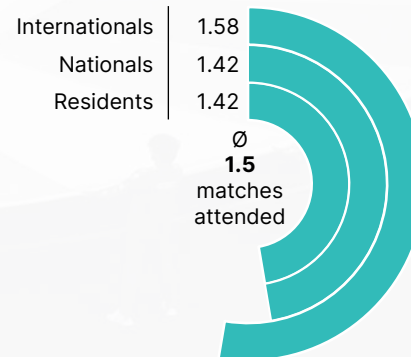
2,664,731
Total Ticket Holders



Unique Ticket Holders



1,711,480
Unique Ticket Holders*



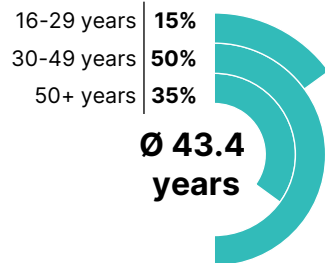
* Unique Ticket Holders express the number of unique individuals that visited the event. It accounts for the fact that Ticket Holders visited several matches over the entire course of the event. Therefore, the total Ticket Holder figure does not reflect the total amount of individual (i.e., unique Ticket Holders) Ticket Holders.
Sample size: 7,841 Ticket Holders of the event



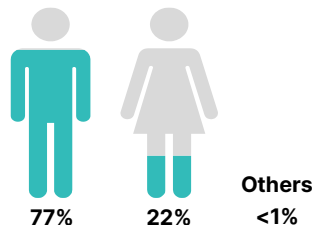
The average Ticket Holder is male, 43 years old and married

Ticket Holders – Characteristics

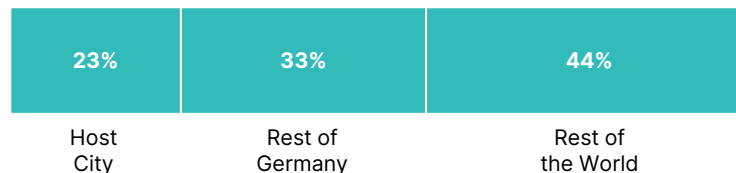
Age



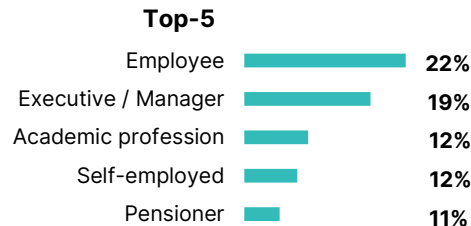
Gender



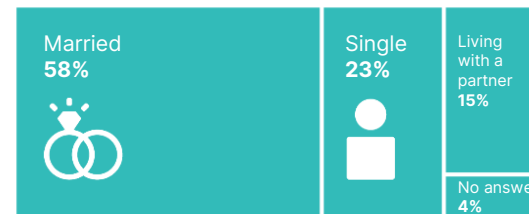
Residence



Occupation



Family status



Sample size: 7,841 Ticket Holders of the event

Economic Impact

Host Country Impact

UEFA EURO 2024

Germany

The 'Economic Impact' section takes a holistic view of all direct and induced expenditure incurred in connection with the Tournament in the Host Country. This includes the expenditure of Ticket Holders, but also of the Tournament organization or the participating associations.



UEFA EURO 2024 had an Economic Impact of around €6.8BN overall

Economic Impact – General findings



The UEFA EURO 2024 had a total economic impact of **€6.8BN** on the Host Country Germany



The event generated a Direct Economic Impact of **€2.1BN** plus an Indirect and Induced Impact of **€4.7BN**



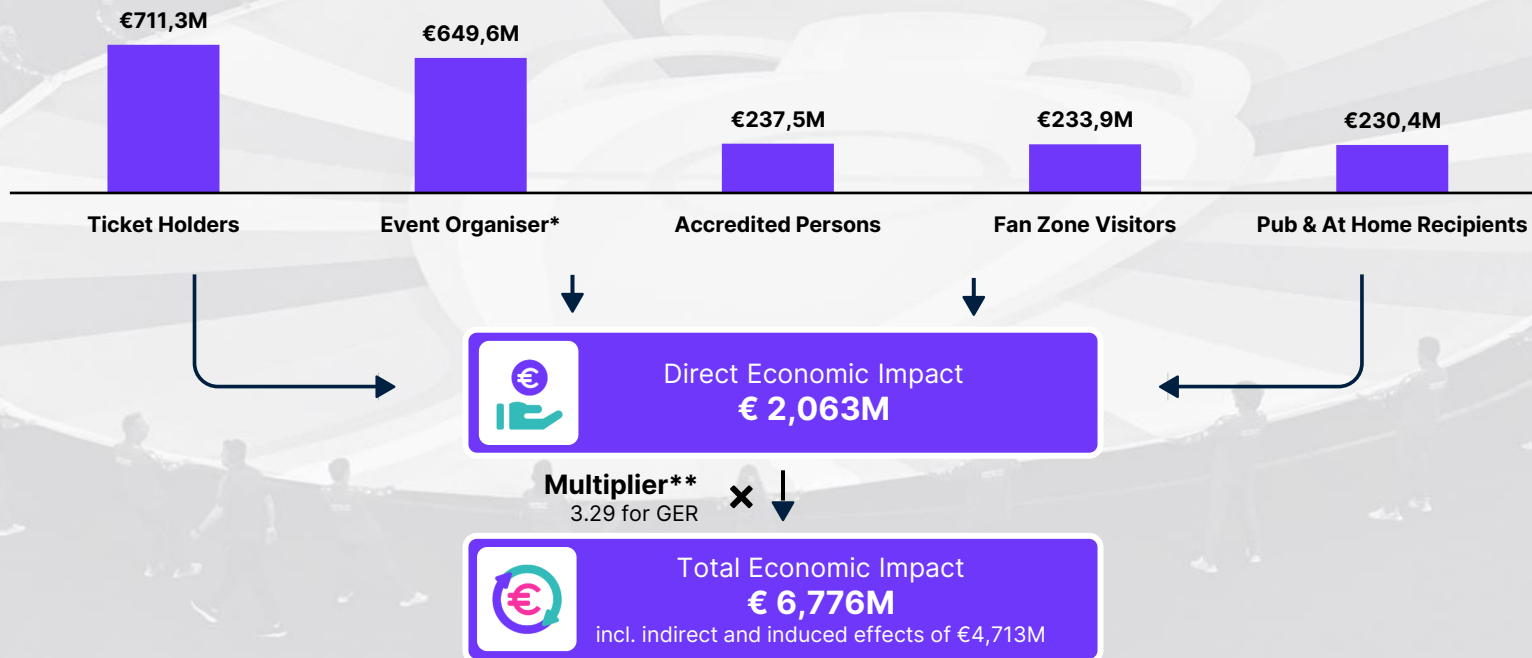
The expenses of the **Ticket Holders** were the most important source of Direct Economic Impact



Expenses of the Ticket Holders as the most important source of Direct Economic Impact



Economic Impact – Overall compilation



* Due to the short notice with which this study was prepared following the Tournament, the final costs could not yet be taken into account in all areas. This calculation is therefore based on a mixture of actual and planned figures.

** Based on the theories of British economist John Maynard Keynes. Calculation is based on the country-specific Marginal Propensity to Consume (MPC), representing the share of each additional Euro of disposable income that is spent on consumption. MPC can be estimated based on key economic parameters such as disposable income and private household consumption within an economy.

Media Impact Host Country Impact

UEFA EURO 2024
Germany

The 'Media Impact' section deals with the effect achieved by the presence and visibility of the Host Cities and the Host Country Germany in the global media.



The UEFA EURO 2024 gave its Host Cities a prominent stage to present themselves

Media Impact – General findings



The ten Host Cities and the Host Country Germany were visible for over **1,150 hours** in total in the global live broadcast



€571M advertising value generated for the Host Cities and the Host Country combined through event broadcasting



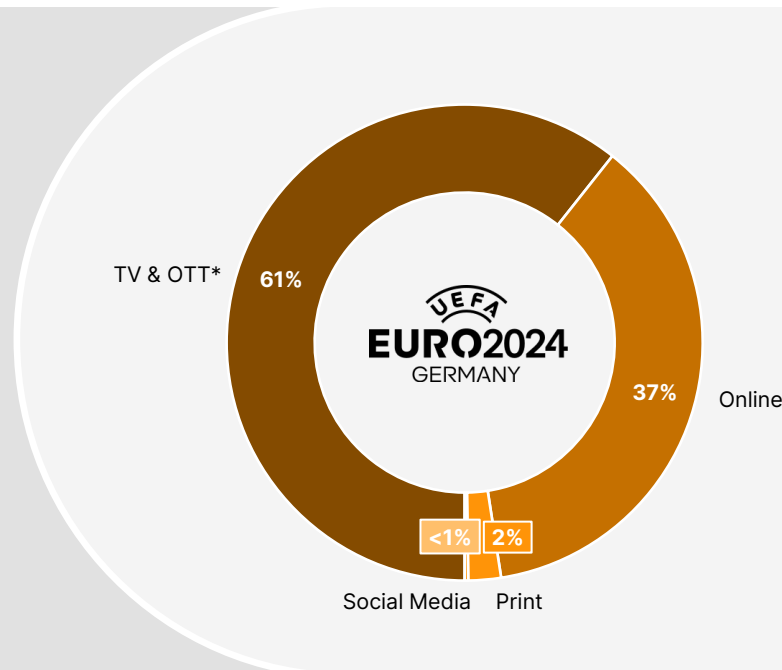
TV & OTT is with **61%** the overall most important source of media value generated

The UEFA EURO 2024 generated a huge broadcasting media value of €571M for its related event Host Country and cities

Media Impact – Split by category



MEDIA IMPACT:
€571M



* TV & OTT contains live and dedicated coverage only, highlight coverage not included.
Source: Nielsen Sports Media Analysis

Host Cities were visible for over 1,150 hours in the global live broadcast

Media Impact – TV & streaming value for Host Cities



€346M TV advertising value



Host Country
Visibilities

TV & Streaming Media Analysis*

KPI	Value
Exposure (hh:mm:ss)	1,150:52:38
Sponsoring contacts	112,904M
100% advertising value	€1,527M
QI value**	€346M

General
Broadcast

KPI	Value
Broadcast Time (hh:mm:ss)	14,515:06:09
Contacts	603,056M

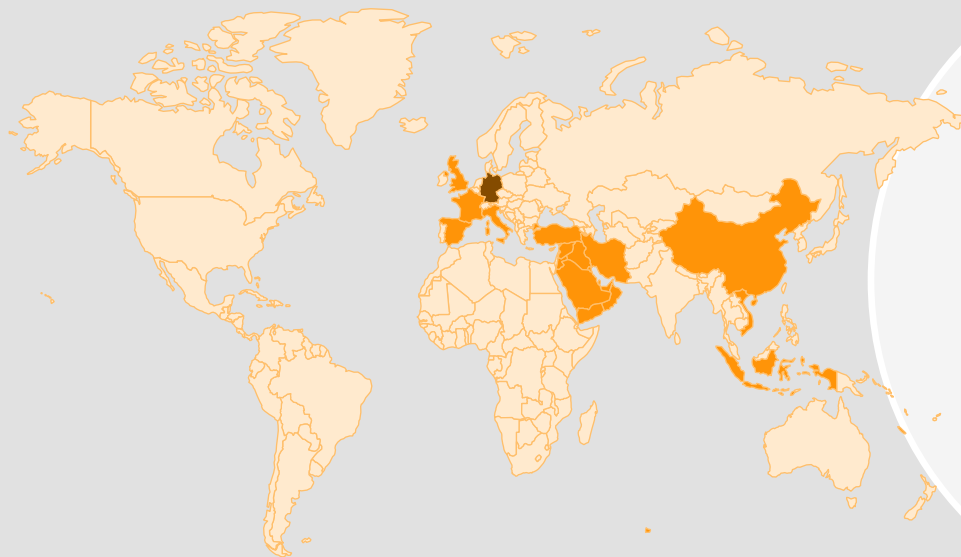
* TV & OTT contains live and dedicated coverage only, highlight coverage not included. The actual figure may therefore differ. Due to the short publication period, the number of viewers is also partially extrapolated.

** The Quality Indexed (QI) Media Value is an impact-based "Quality Index Score" that is calculated uniquely for brand sequences detected during analysis. The QI score of brand exposure is determined through five factors (size, location, duration, number of brand hits and impact factor) and then applied as a weighting for the value calculation. The QI media value is the result of the unweighted media value multiplied by the QI score.

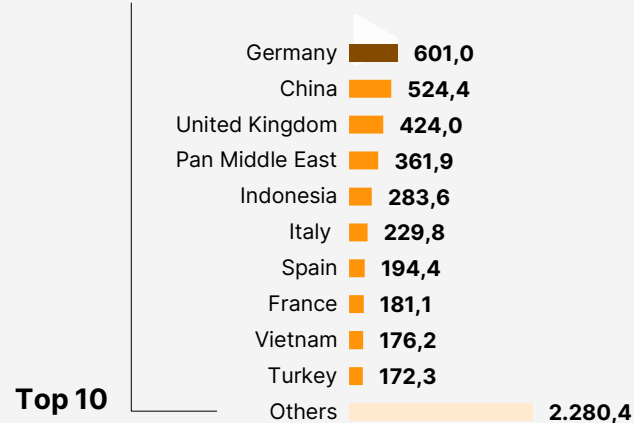
Source: Nielsen Sports Media Analysis

Top three markets that watched the UEFA EURO 2024 are Germany, China and the United Kingdom

Media Impact – TV and streaming live audience by origin



5,429M*
live audience watched UEFA EURO 2024



*live cumulative event audience
Source: UEFA Audience Data

Social Impact

Host Country Impact

UEFA EURO 2024 Germany

The 'Social Impact' section deals with the influence of UEFA EURO 2024 on German society and the perception of the Tournament by its inhabitants. The effects on the healthcare system due to more frequent sporting activities or volunteer mission during the Tournament are measured.



The UEFA EURO 2024 exerts significant impact on the communities of the related Host Cities

Social Impact – General findings



The overall Social Impact of the UEFA EURO 2024 resulted in a monetary value of **€95M**. Around **€85M** result out of the fact that its spectators were inspired to be more active physically. Another **€10M** were generated through voluntary mission through the UEFA Volunteer Program.



26% of the resident Ticket Holders stated that they are inspired to do more sports. On average people will do **2.17** additional hours per week.



85% of all visiting residents feel a stronger sense of pride because their city is hosting the UEFA EURO 2024.

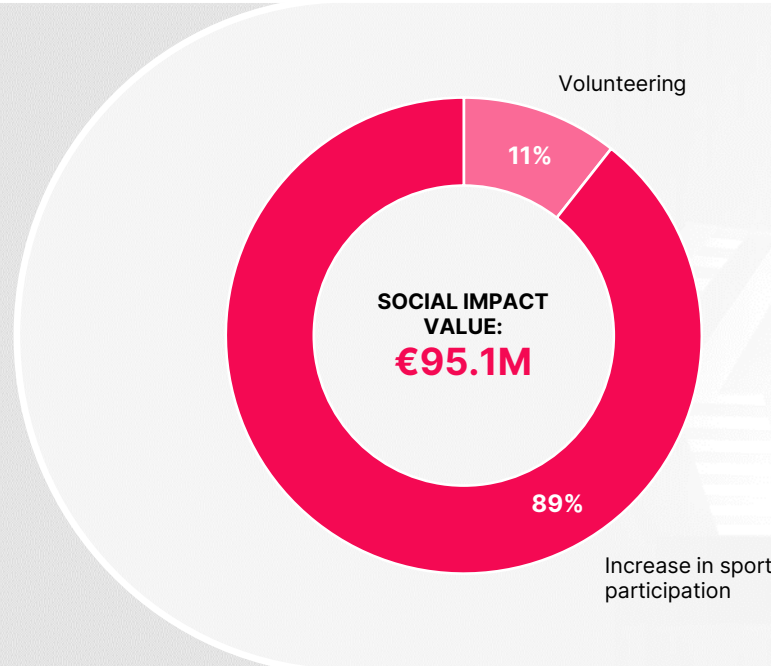


Overall Social Impact for Germany and related Host Cities amounts to €95M

Social Impact – Split by category



TOTAL SOCIAL IMPACT:
€95.1M





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