



Report

Host Country Impact

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



UEFA
EURO2024
GERMANY

Expertise by Nielsen Sports – August 2024
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Management Summary

Host Country Impact

UEFA EURO 2024
Germany

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

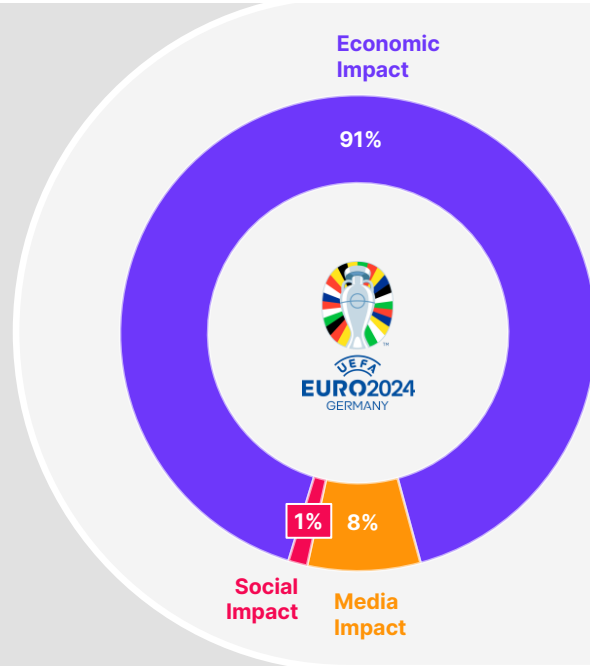


The UEFA EURO 2024 must be considered a great success due to the major impact on its Host Country Germany

Host Country Impact of UEFA EURO 2024



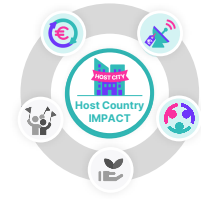
HOST COUNTRY IMPACT:
€7,442M



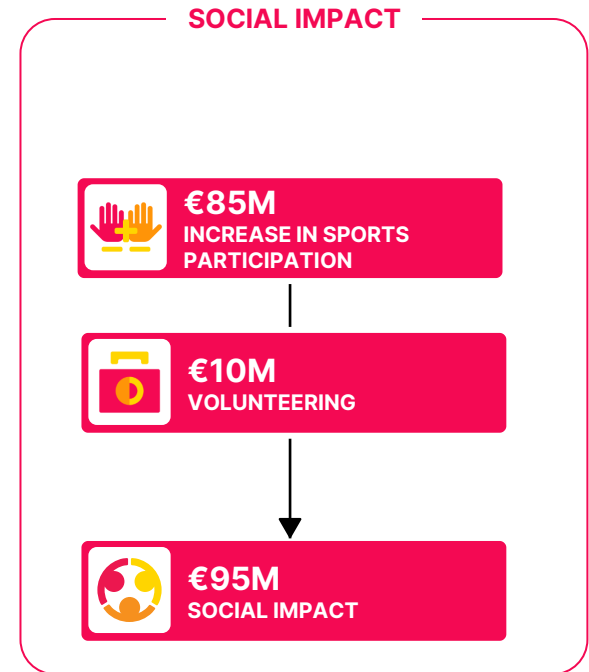
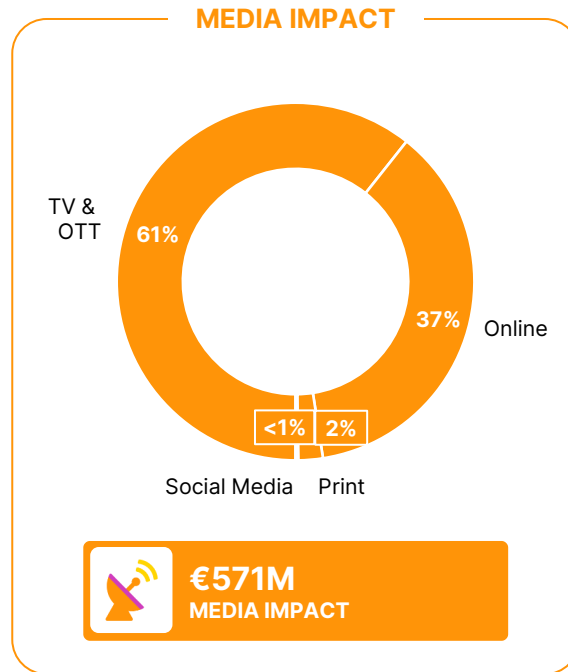
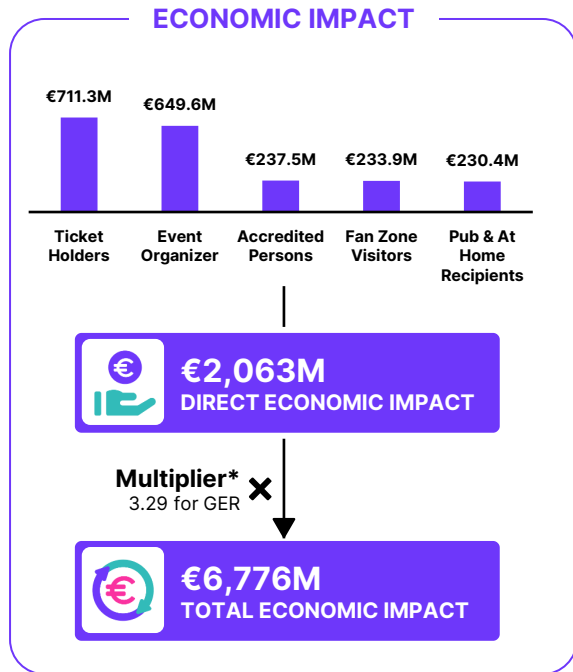
Summary

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

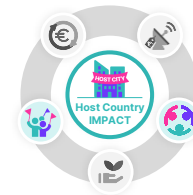


Rounding errors can apply

* 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

Event Overview

Host Country Impact

UEFA EURO 2024
Germany

UEFA EURO 2024 took place in 10 German Host Cities across the nation and attracted a total of 2.7M people

UEFA EURO 2024 event



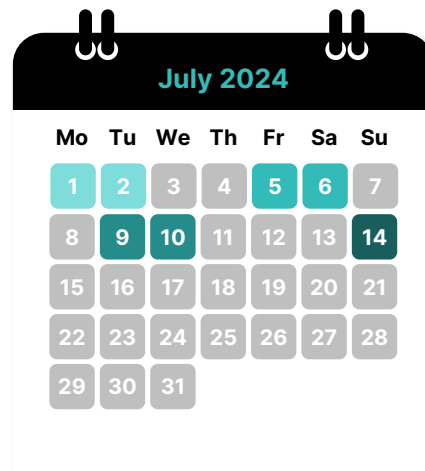
Key facts

Name	UEFA EURO 2024 Germany
Date	14 th June – 14 th July 2024
Host Country	Germany
Host Cities	Berlin [BER], Cologne [COL], Munich [MUN], Frankfurt [FRA], Hamburg [HAM], Dortmund [DOR], Leipzig [LEI], Gelsenkirchen [GEL], Stuttgart [STU], Düsseldorf [DÜS]
Teams	24 national teams
Matches	51
Gender	Men
Ticket Holders	2,664,731 (52,250 per match)



The Tournament started with the opening match on 14th June and ended with the final on 14th July

Event calendar



● Group stage ● Round of 16 ● Quarter-finals ● Semi-finals ● Final

The Tournament was held in ten different stadiums across the entire country

Location of the venues

VOLKSPARKSTADION HAMBURG

Hamburg, Hamburg
Capacity: 49,000
Matches: 5

ARENA AUF SCHAALKE

Gelsenkirchen, North Rhine-Westphalia
Capacity: 50,000
Matches: 4

DÜSSELDORF ARENA

Duesseldorf, North Rhine-Westphalia
Capacity: 54,000
Matches: 5

COLOGNE STADIUM

Cologne, North Rhine-Westphalia
Capacity: 43,000
Matches: 5

STUTTGART ARENA

Stuttgart, Baden-Wuerttemberg
Capacity: 54,000
Matches: 5

LEIPZIG STADIUM

Leipzig, Saxony
Capacity: 40,000
Matches: 4

OLYMPIASTADION BERLIN

Berlin, Berlin
Capacity: 71,000
Matches: 6

BVB STADION DORTMUND

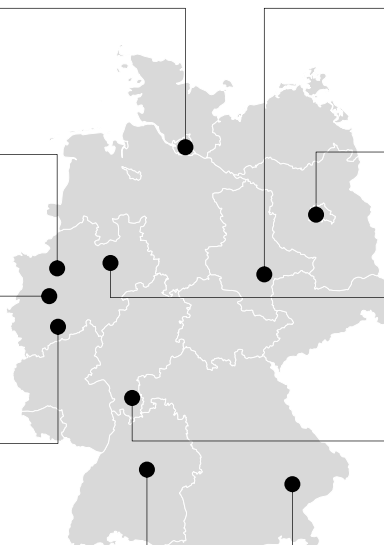
Dortmund, North Rhine-Westphalia
Capacity: 62,000
Matches: 6

FRANKFURT ARENA

Frankfurt, Hesse
Capacity: 47,000
Matches: 5

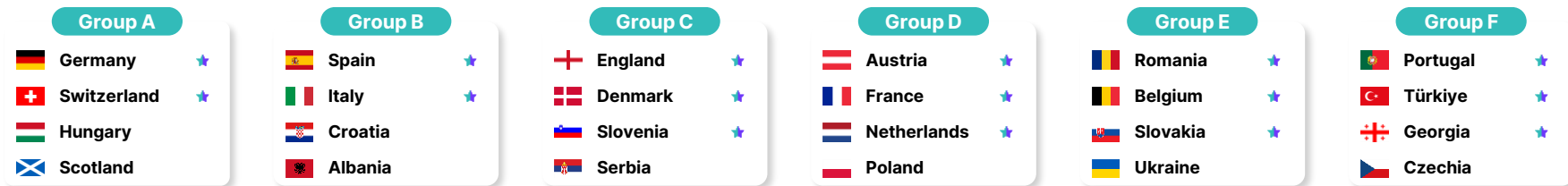
MUNICH FOOTBALL ARENA

Munich, Bavaria
Capacity: 66,000
Matches: 6



Congratulations to Spain winning the UEFA EURO 2024!

UEFA EURO 2024 bracket



Study Approach

Host Country Impact

UEFA EURO 2024
Germany

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.

This study analyses the monetary effect for Germany. The effects mainly arise in the 10 host cities, but also partly in the rest of Germany. For this reason, the sum of the monetary effects of the host cities does not add up to the total effect for Germany as a whole.



For reliable results various data sources are applied for this research

Data sources

1

On-site studies among Ticket Holders...

...deliver insights on consumption and Ticket Holders' spending behavior at the event and in the Host Country.

2

Host / Host City / UEFA data...

...reveals local organizational revenues and spending of the event organizer, as well as missioning hours of volunteers.

3

Media data...

...quantifies the media value which is generated by the event for the Host Country and the Host Cities due to exposure in media.

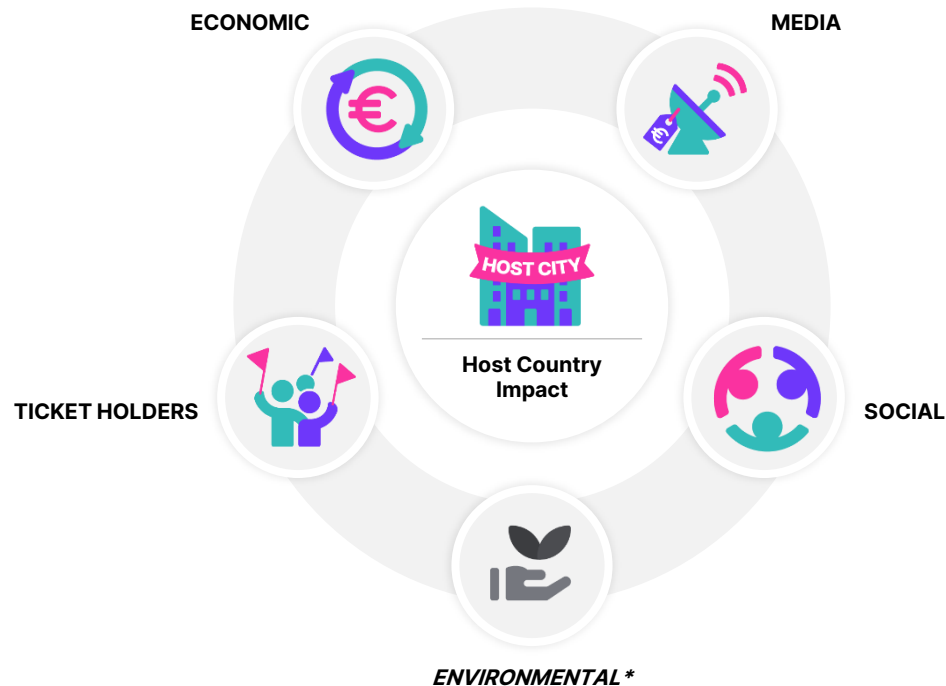
4

Expertise...

...to ensure the highest possible validity of the data, the figures are solidified using benchmarks and Nielsen Sports expertise.



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.

[Methodology](#)

If you want to learn more about the methodology for each category please [click here](#)

Study Results

Host Country Impact

UEFA EURO 2024
Germany

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



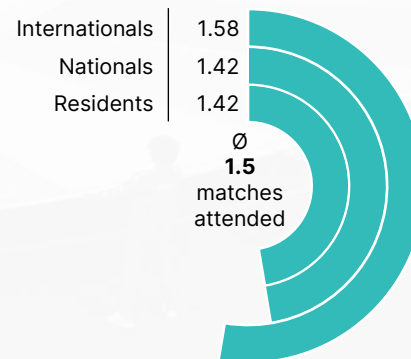
2,664,731
Total Ticket Holders



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

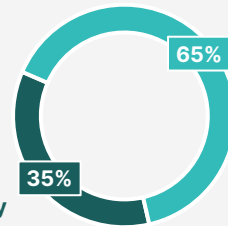
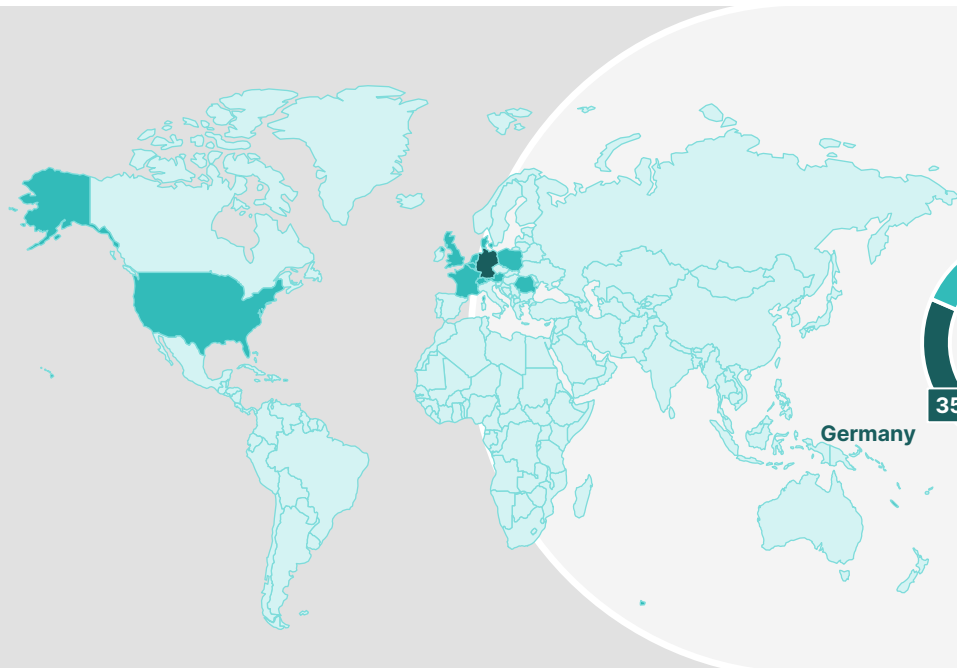
Many of the Ticket Holders travelled from the UK, which will be the host of the UEFA EURO 2028

Ticket Holders – Split by origin



2,664,731

Ticket Holders of UEFA EURO 2024



International

Top 10

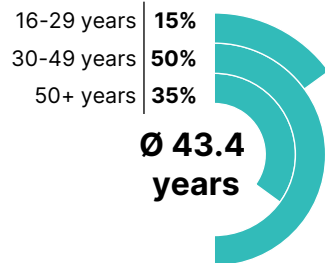
UK	9.4%
Netherlands	4.4%
Switzerland	4.0%
Austria	3.8%
Romania	3.1%
United States	2.5%
Belgium	2.5%
Poland	2.5%
Denmark	2.4%
France	2.2%
Others	28.0%



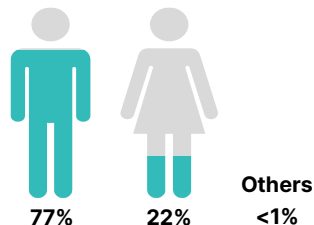
The average Ticket Holder is male, 43 years old and married

Ticket Holders – Characteristics

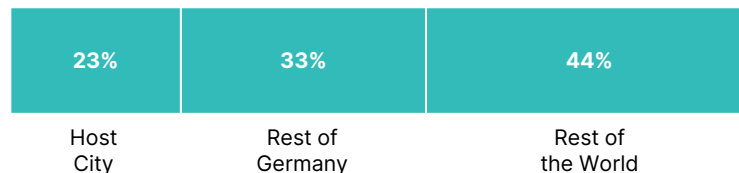
Age



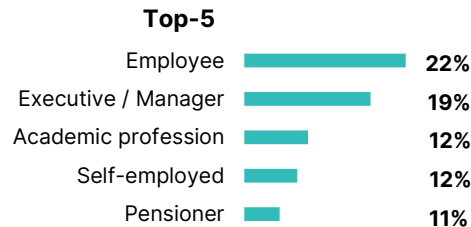
Gender



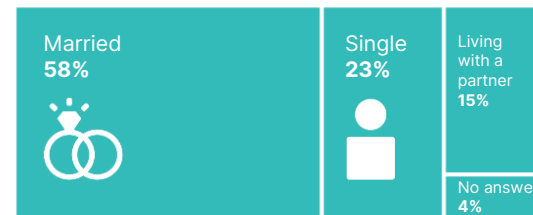
Residence



Occupation



Family status



Sample size: 7,841 Ticket Holders of the event

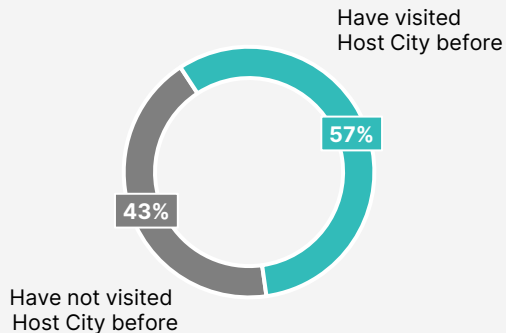
Almost every international Ticket Holder says that they would like to visit Germany again

Ticket Holders – Visiting Host City



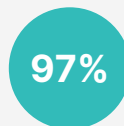
Visit to Host City in the past

Non-resident Ticket Holders



Revisit of Host Country in the future

International Ticket Holders

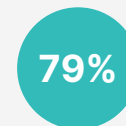


OF INTERNATIONAL TICKET HOLDERS

stated that they would like to visit the Host Country Germany again.

Recommendation of a visit to Host Country

International Ticket Holders



OF INTERNATIONAL TICKET HOLDERS

stated that they would recommend visiting the Host Country Germany.



Questions: Did you ever visit the Host City in the past before UEFA EURO 2024?

Question: Would you recommend visiting Germany to your family and friends? (4-point-scale: 1 = "Very likely" to 4 = "No"; Top 2 Box)

Sample size: 6,014 non-resident Ticket Holders of the event, 3,412 international Ticket Holders of the event

Ticket Holders were very positive about the Host Cities and expect to come back to visit again

Ticket Holders – Perception of the Host City



All Ticket Holders

UEFA EURO 2024 was a **figurehead** for the Host City

74%

UEFA EURO 2024 **improved my impression** of the Host City **54%**



44% The Host City has become **more attractive as a holiday or weekend trip destination** to me after my recent visit to the city

Question: To what extent do you agree with the following statements? (5-point-scale: 1 = "Totally agree" to 5 = "Do not agree"; Top 2 Box)
Sample size: 7,841 respondents

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



[Please click here for a definition of the Economic Impact categories](#)

[Methodology](#)

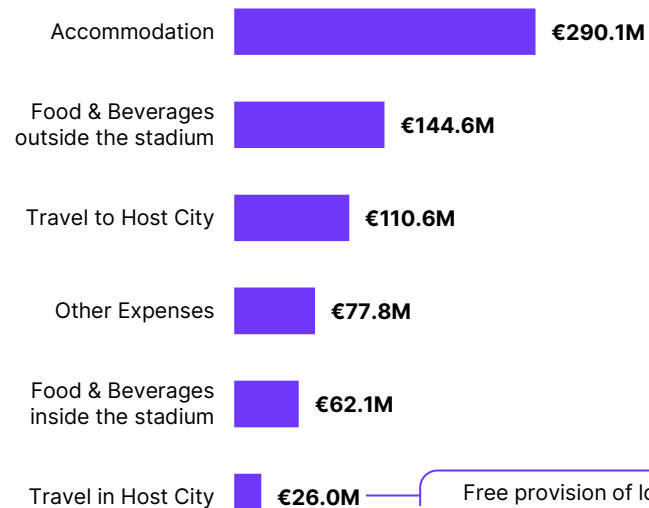
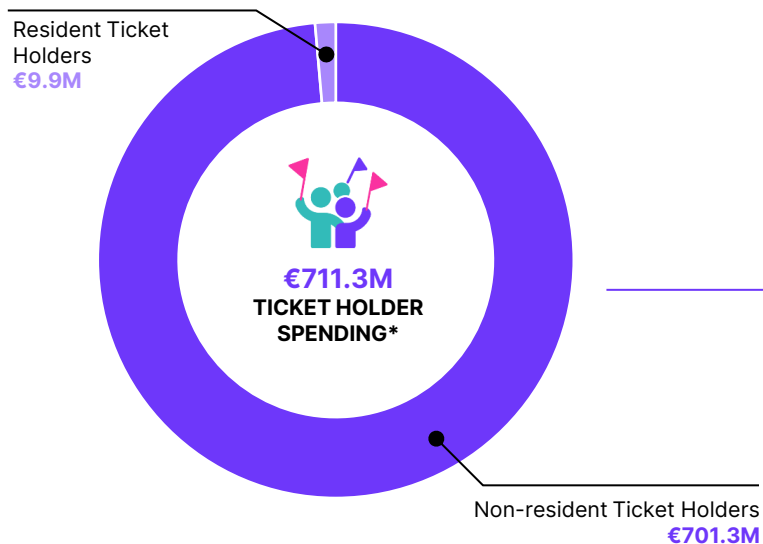
* Due to the short notice with which this study was prepared following the Tournament, the final costs could not yet be taken into account in all areas. This calculation is therefore based on a mixture of actual and planned figures.

** 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.

Ticket Holders spent slightly over €711M to attend the UEFA EURO 2024



Economic Impact – Ticket Holder spending by category



Free provision of local public transport by UEFA in coordination with the respective transport companies

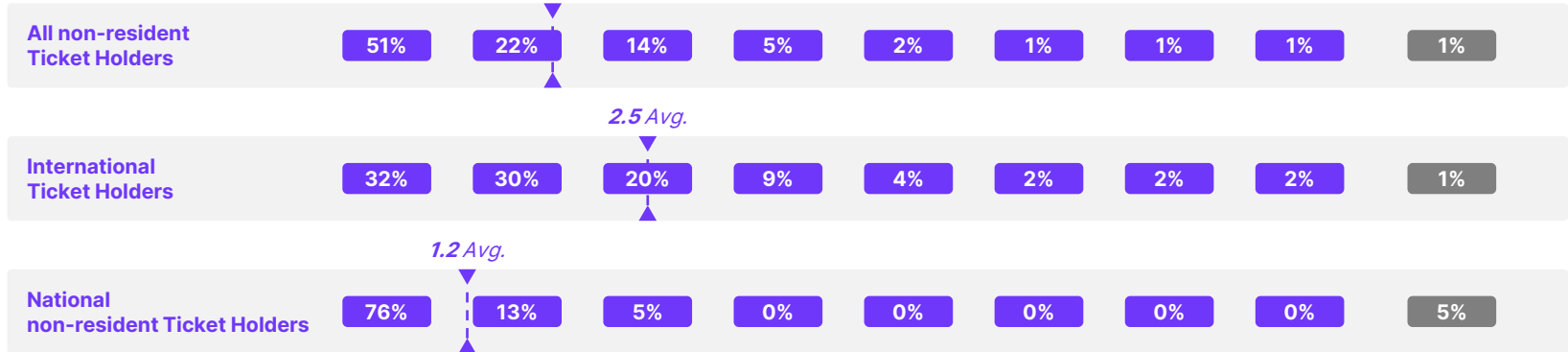
* Ticketing and merchandise spendings are not included, as sales by Swiss-based UEFA do not generate any economic impact in the German market.

Ticket Holders stayed for almost two days on average – 87% stayed up to three nights

Economic Impact – Ticket Holder duration of stay



Non-resident Ticket Holders



Question: How many days did you stay in Germany this time?
Sample size: 6,014/3,412/2,602 non-resident Ticket Holders of the event

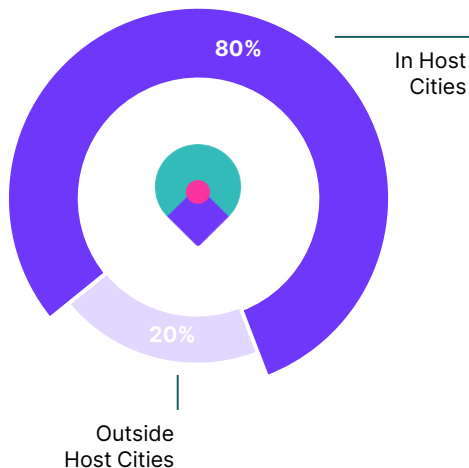


80% of non-resident Ticket Holders stayed within the Host Cities

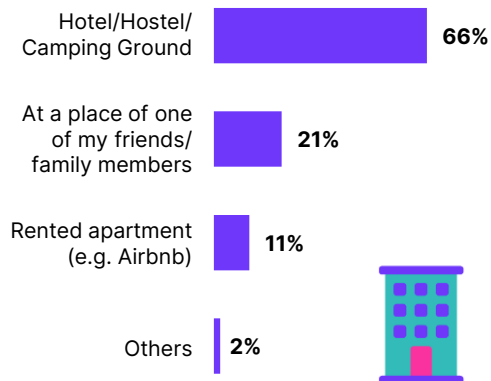
Economic Impact – Ticket Holder spending accommodation

Non-resident Ticket Holders

Place of accommodation

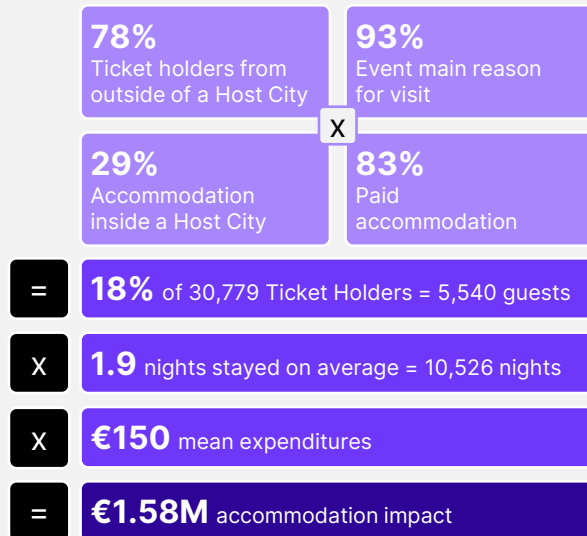


Form of accommodation



Calculation approach of the economic impact of accommodation

Exemplary calculation



Questions: Where was your accommodation during your stay located? Where did you spend the nights during your stay?
Sample size: 2,790 non-resident Ticket Holders of the event from outside the Host Cities

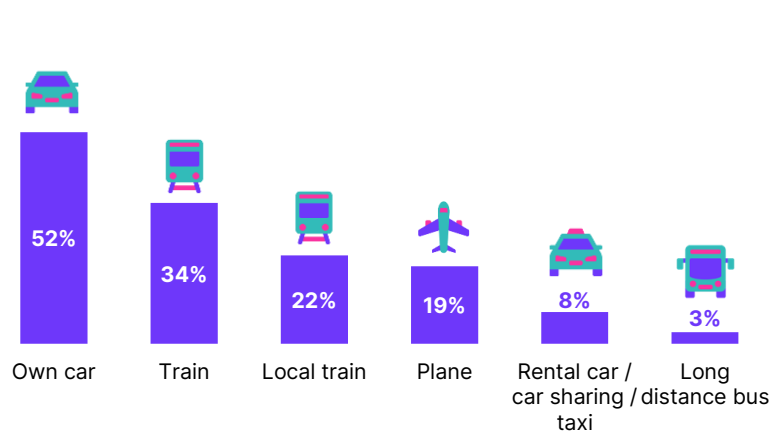
Almost two thirds of Ticket Holders used public transport within the Host Cities

Economic Impact – Ticket Holder transport



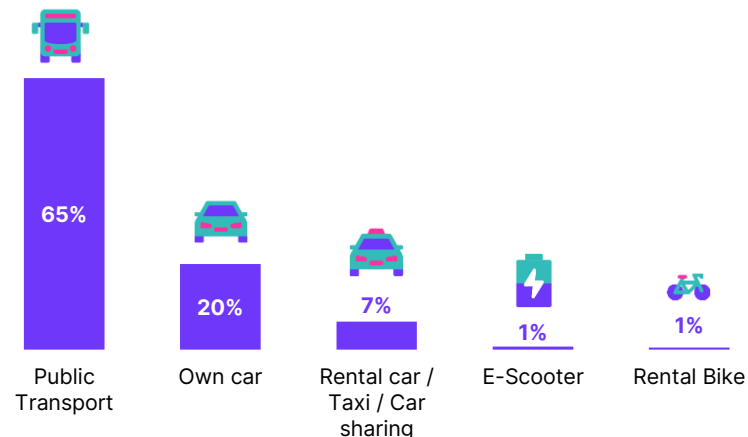
Transport to Host Cities

Non-resident Ticket Holders



Transport in Host Cities

All Ticket Holders



Questions: Which of the following means of transportation did you use to travel to Germany and/or to the Host City on your trip to UEFA EURO 2024? Which of the following means of transportation did you mainly use to travel within the Host City to visit matches of UEFA EURO 2024? Please choose the means of transportation that you have used most frequently.
 Sample size: 6,041 non-resident Ticket Holders of the event / 7,841 Ticket Holders of the event

Around €207M were spent for food and beverage by ticket holders – around 30% inside the stadiums

Economic Impact – Ticket Holder spending food and beverages



All Ticket Holders

Spending for Food and Beverages

Non-resident Ticket Holders

Non-resident Ticket Holders of UEFA EURO 2024 who cited the event as the main reason for their visit to the Host City had the following expenditure on food and beverages

During
UEFA EURO 2024
match
€26

Outside of
UEFA EURO 2024
match
€71

Economic value

€52.9M + €144.6M

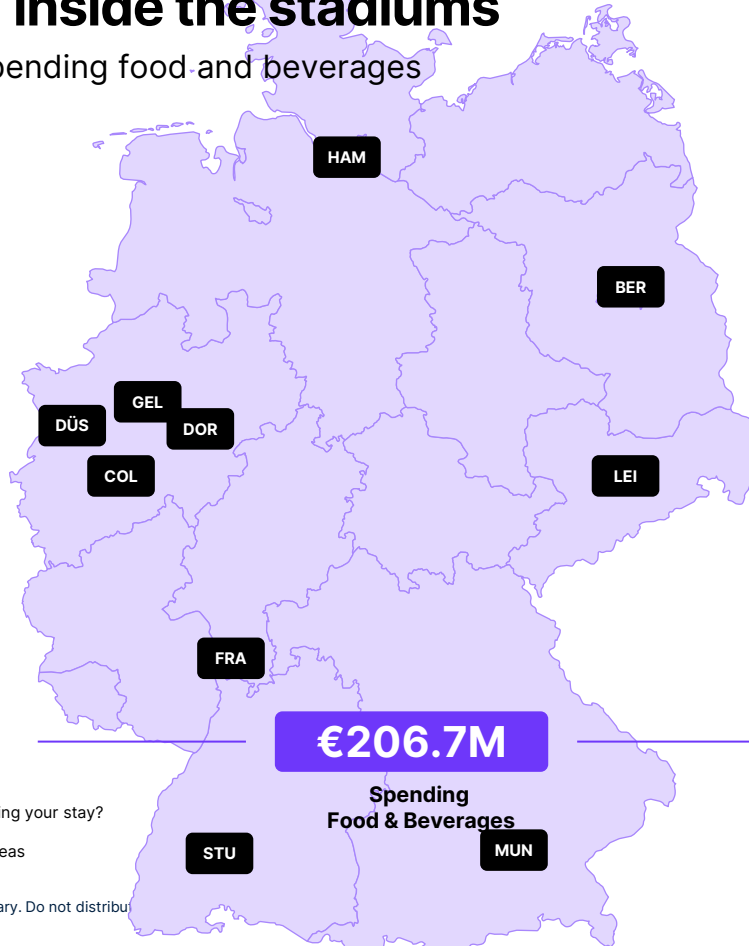
Resident Ticket Holders

Resident Ticket Holders of UEFA EURO 2024 who live in the Host City had the following expenditure on food and beverages

During
UEFA EURO 2024
match
€15

Economic value

€9.2M



€206.7M

Spending
Food & Beverages

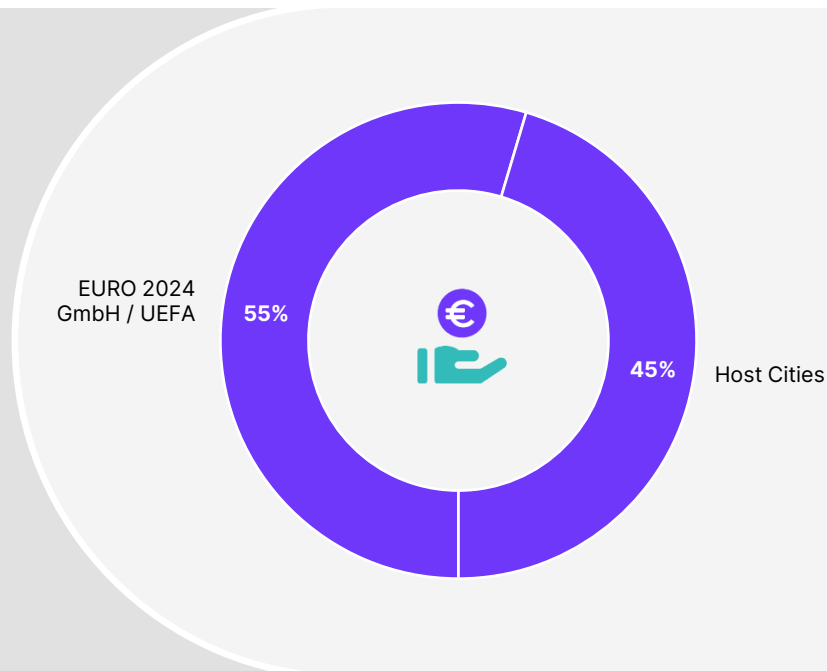
Questions: How much money did you roughly spend in HOST CITY during your stay?
Please think about everything you spend specifically in the Host City.
Please estimate your personal expenses in Euro (€) for the following areas
Sample size: 7,841 Ticket Holders of the event

Around €650M were spend in Germany to organize the UEFA EURO 2024

Economic Impact – Event Organizer spending



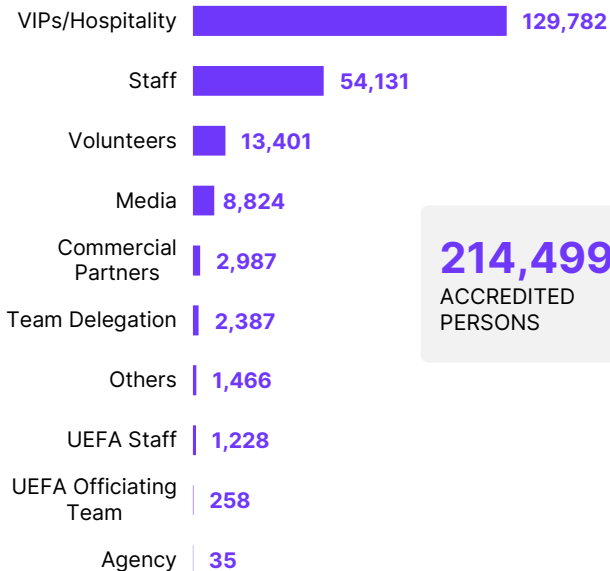
**EVENT ORGANIZER
SPENDING*: €649.6M**



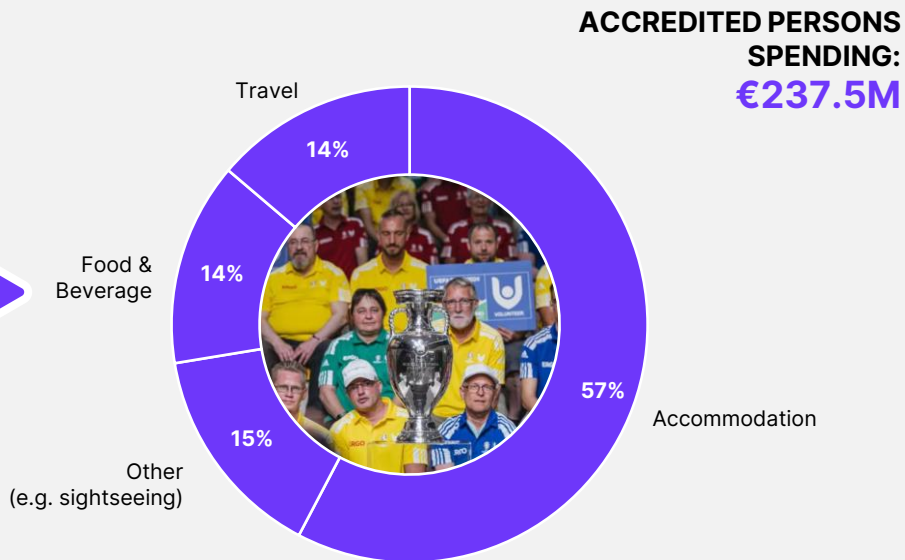
* Due to the short notice with which this study was prepared following the Tournament, the final costs could not yet be taken into account in all areas. This calculation is therefore based on a mixture of actual and planned figures.
Source: Indication of the Hosts

The expenses for the Accredited Persons amount to around €238M

Economic Impact – Accredited Persons spending



214,499
ACCREDITED
PERSONS

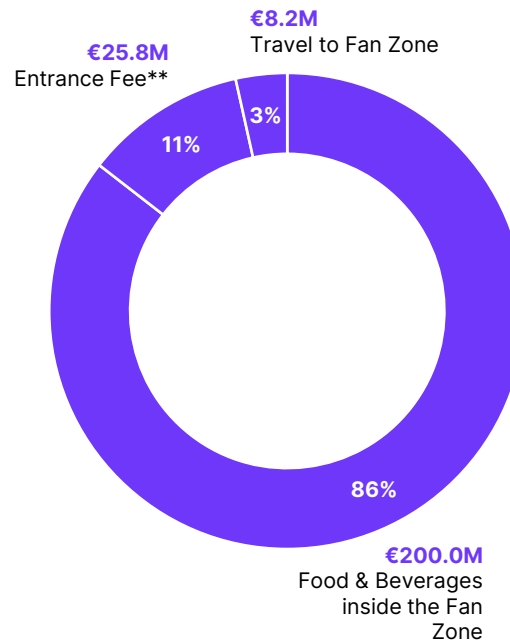


UEFA Fan Zones and Public Screening Program generated added value of €234M

Economic Impact – Fan Zone Visitors spending



FAN ZONE VISITORS*
SPENDING: €233.9M



* Calculation of expenses contains visitors of official UEFA EURO 2024 Fan Zones plus UEFA-licensed Public Screening Events.

** Official UEFA EURO 2024 Fan Zones did not charge any entrance fee. Only Public Screening Events charged entrance fees.

Almost €200M were spent by people who watched the matches in pubs and at watchparties at home

Economic Impact – Pub & At Home Recipients spending



**PUB & AT HOME RECIPIENTS
SPENDING: €199.6M**

Pub Recipients*



1.86M intention of watching a match in gastronomy

X **4.0** number of matches watched in gastronomy

X **€25** mean expenditures

= **€185.88M** Pub impact

At Home Recipients**



2.78M intention of attending a watchparty

X **20%** of attendees going grocery shopping

X **4.0** number of matches watched at a watchparty

X **€20** mean expenditures per purchase

= **€44.53M** At Home impact

* Pub Recipients: Spectators who watch matches in gastronomy

** At Home Recipients: Spectators who watch games in groups at home

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



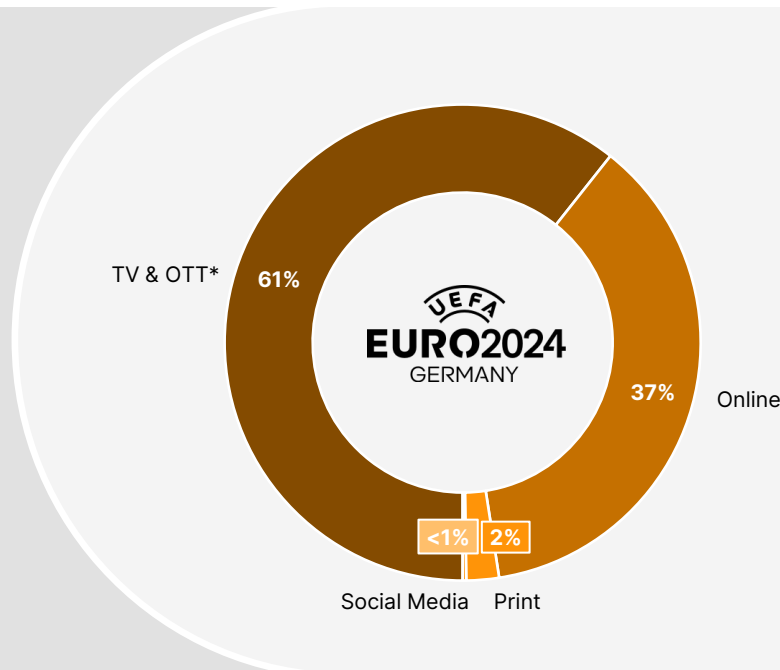
TV & OTT is with **61%** the overall most important source of media value generated

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



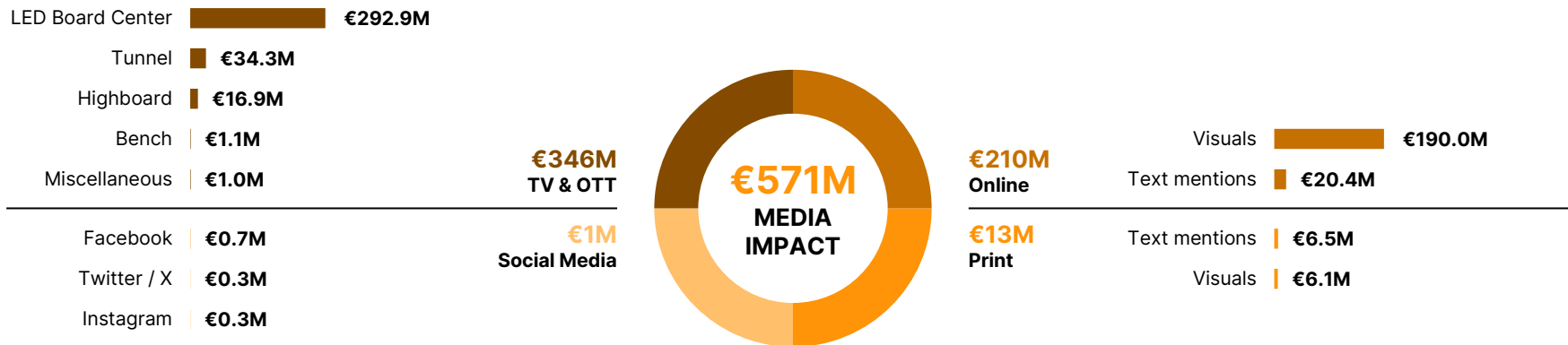
MEDIA IMPACT:
€571M



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

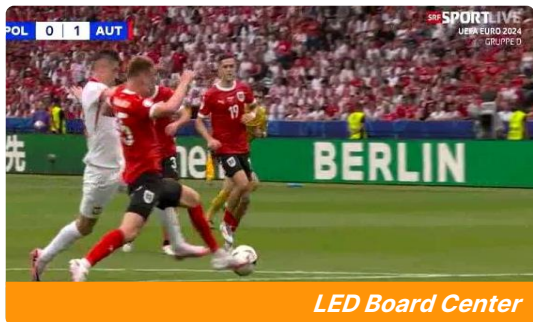
More than 50% of the total media value is created by the center LED Board

Media Impact – Split by category and tool



The Host Cities and the Host Country were visible on various advertising tools inside the stadiums

Media Impact – Visibility for Host Cities on advertising tools



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

EURO2024

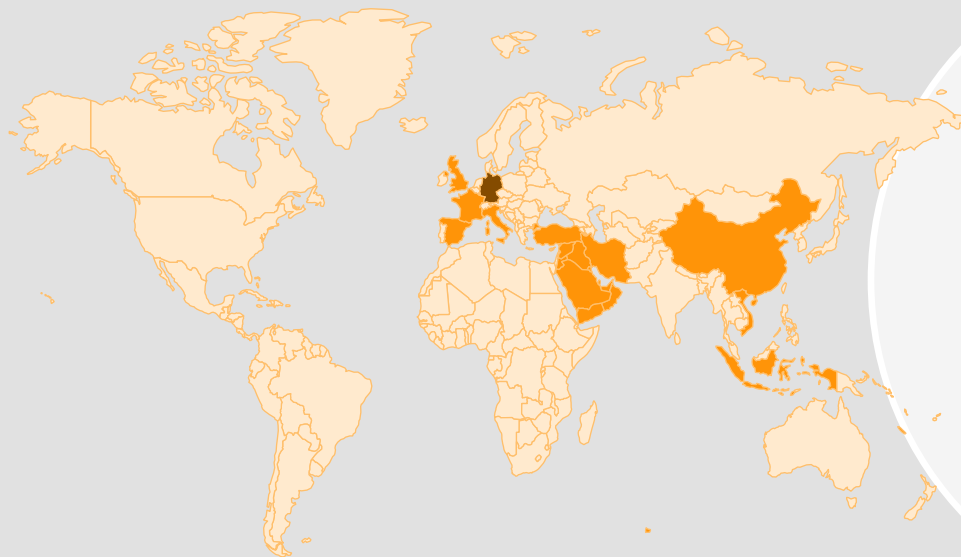
* TV & OTT contains live and dedicated coverage only, highlight coverage not included. The actual figure may therefore differ. Due to the short publication period, the number of viewers is also partially extrapolated.

** 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.

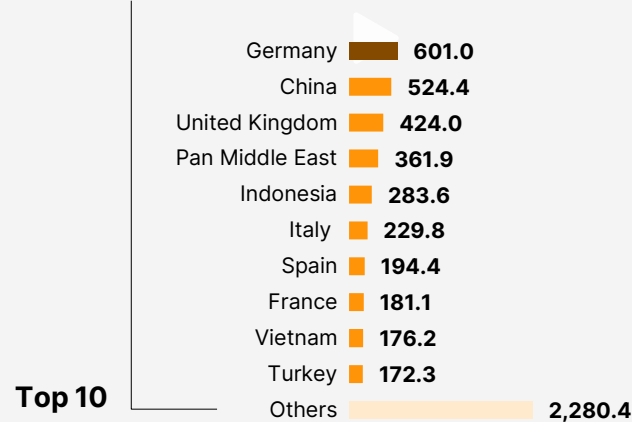
Source: Nielsen Sports Media Analysis

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



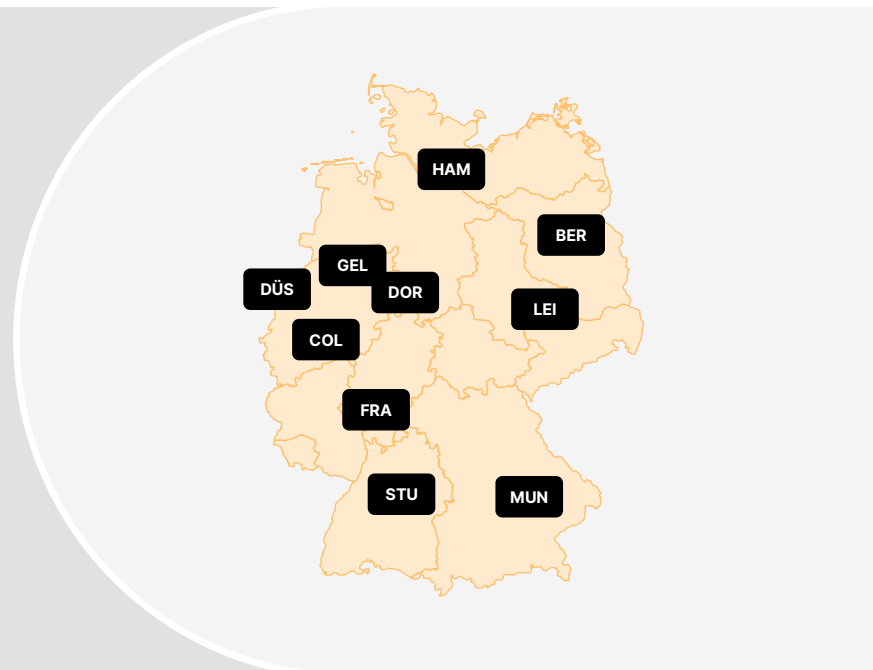
*live cumulative event audience
Source: UEFA Audience Data

Host Cities of UEFA EURO 2024 were mentioned 146k times in online media generating €210M QI media value

Media Impact – Online KPIs

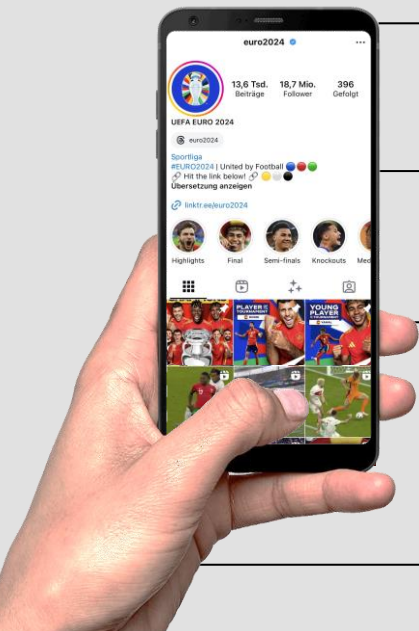


KPI	Total
Number of mentions	145,808
Sponsorship contacts	63,144M
100% advertising value	€647M
QI media value	€210M



Facebook accounts for the largest proportion of the social media QI value for the Host Cities and the Host Country

Media Impact – Social media performance per social network



		Impressions			
		Total	Instagram	Facebook	X
		855.2M	20%	45%	35%
		Engagements			
		Total			
		35.7M	79%	11%	10%
		Media Value			
		Total			
100%	Media Value	€4.6M	24%	51%	26%
		Total			
	QI Media Value	€1.4M	24%	51%	26%

Source: Nielsen Sports Media Analysis

Social Media Listening

The Social Media Listening analyses the generated buzz around UEFA EURO 2024 and helps to create a deep understanding of the opinion around the Tournament. Insights can be drawn from this for the processing and organization of future events.

The Host Cities and Germany took on an important role in the social media buzz surrounding the event

Social Media Listening – General findings



2.05M

...posts were identified on social media worldwide in connection with the UEFA EURO 2024 during the analysis period from 14th June – 14th July 2024



116k

...posts contained the word mark Germany or one of the Host Cities in social media communication around the UEFA EURO 2024, which corresponds to a share of 6% of all identified posts



35.7M

...engagements were generated in the measured period for the posts including either a Host City or Germany - 308 engagements per post



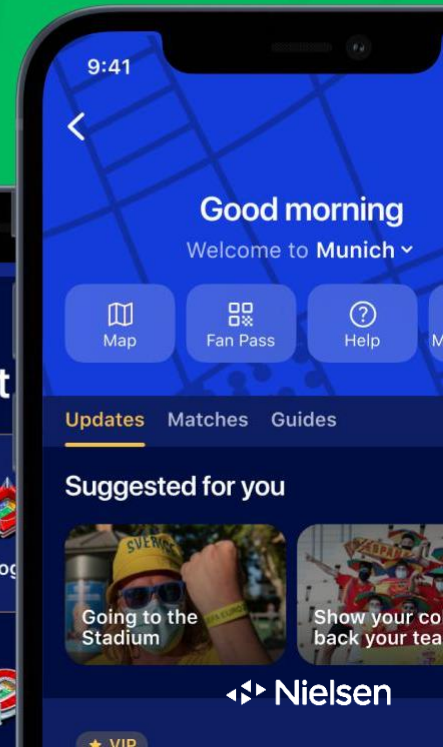
77%

...of all identified posts including either a Host City or Germany in the analysis period came from X, which represents the main driver of public communication



78%

...of all identified posts including either a Host City or Germany in the analysis period were published by a male author




In around 6% of the total social media buzz around the UEFA EURO 2024, either a Host City or Germany was mentioned

Social Media Listening – Global Buzz and project focus



Worldwide Buzz UEFA EURO 2024

[Instagram, Facebook, X; 14th June – 14th July 2024]

Number of Posts 

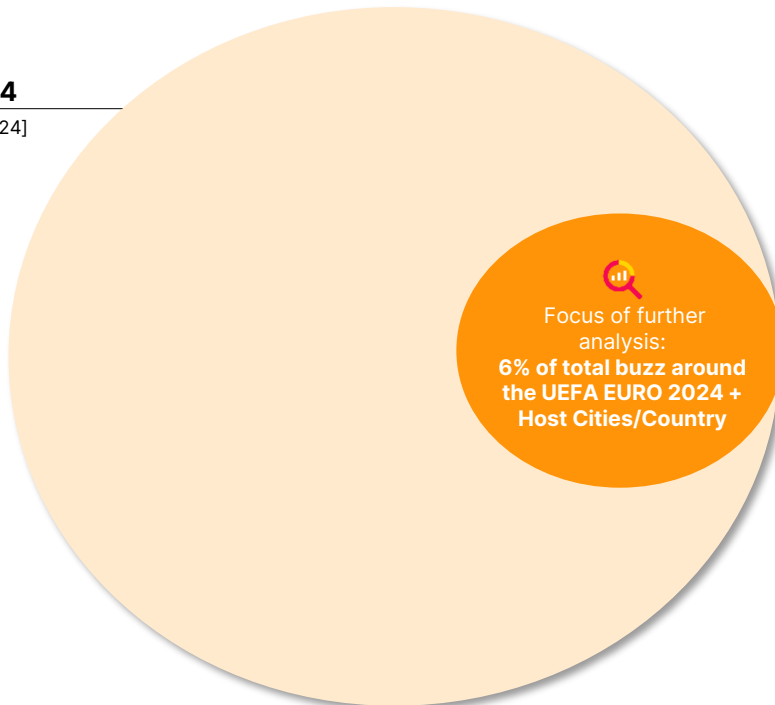
2,053,316

Estimated Reach 

26,855,665,926

Number of Engagements 

498,687,716



Host City and Host Country Buzz

The following social media analysis focuses on the buzz around that includes one of the ten Host Cities or the Host Country Germany.

Number of Posts 

115,984

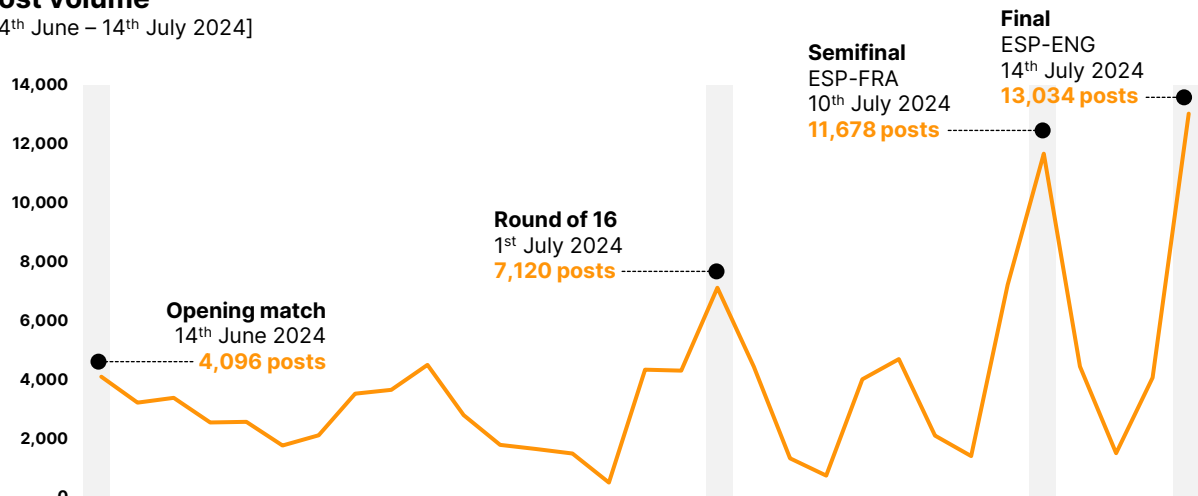
116K posts globally identified around the UEFA EURO 2024 that included the Host Cities or Germany on major social networks



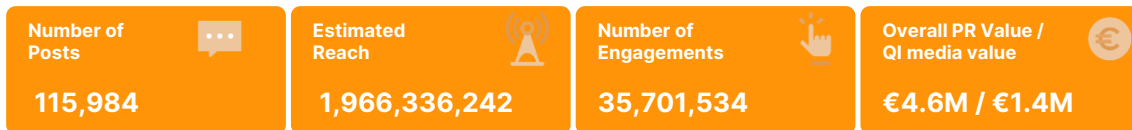
Social Media Listening – General KPIs

Post volume

[14th June – 14th July 2024]



An estimated social media reach of around 2BN was created through 116k posts. Although a consistently high level of buzz was generated on all match days, the peaks were around the Round of 16 matches on 1st July and, as expected, around the semi-finals and the final on 14th July.



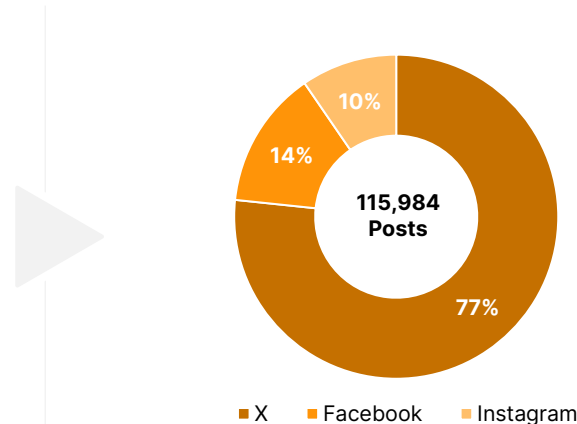
Source: Nielsen Sports Social Analytics

All three platforms play a different role in users' digital communication

Social Media Listening – Split by platform



	X	Facebook	Instagram
Posts	88,912	15,967	11,105
Estimated Reach	976,452,618	679,377,769	310,505,855
Reach/Post	10,982	42,549	27,961
Engagements	3,539,444	3,952,429	28,209,661
Eng./Post	40	248	2,540



In a comparison of the three platforms, **X achieves by far the greatest absolute reach**. Facebook however achieves the highest reach value per post at just under 43K.



In a comparison **of engagements, Instagram is the most valuable platform**. Here, the highest values are achieved both overall (factor 7) and per post (factor 10) compared to runner-up Facebook.

Almost 20% of generated social media buzz was posted from residents of the Host Country

Social Media Listening – Split by socio-demography internationally

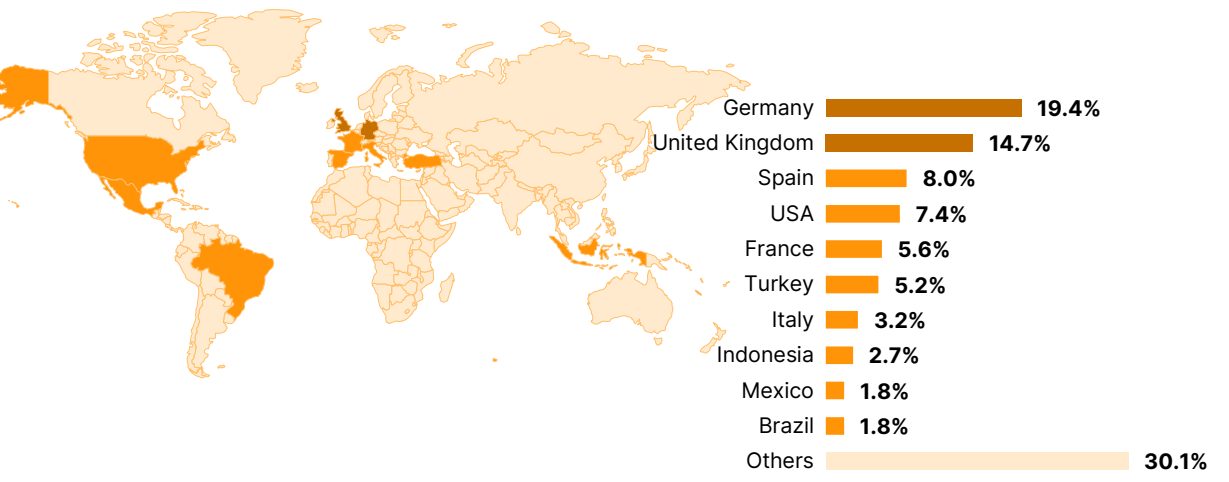


Author split per country (top-10)

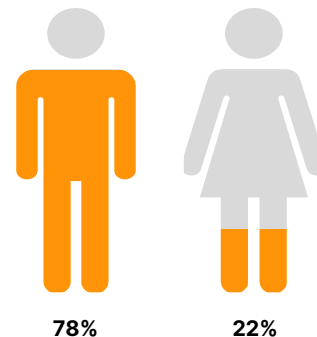


115,984 Posts

Top 10



Author split by gender



The Host Cities and Germany played a good role on social media and were often mentioned

Social Media Listening – Buzz analysis



The Hashtag #euro2024 was by far the most used keyword in the global buzz around the UEFA EURO 2024. It was used in more than 62,000 posts of those that also include the Host Cities or Germany.

In addition to the **UEFA EURO keywords**, the top keywords in the buzz around the event also involve **most of the ten Host Cities and Germany**. However, this is not surprising since we only have a look at those posts here that are also connected to the Host Cities or Germany itself.

With a 20% share of positive connotated posts, the UEFA EURO 2024 is perfectly in line with the average of other sporting events.



Source: Nielsen Sports Social Analytics

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.

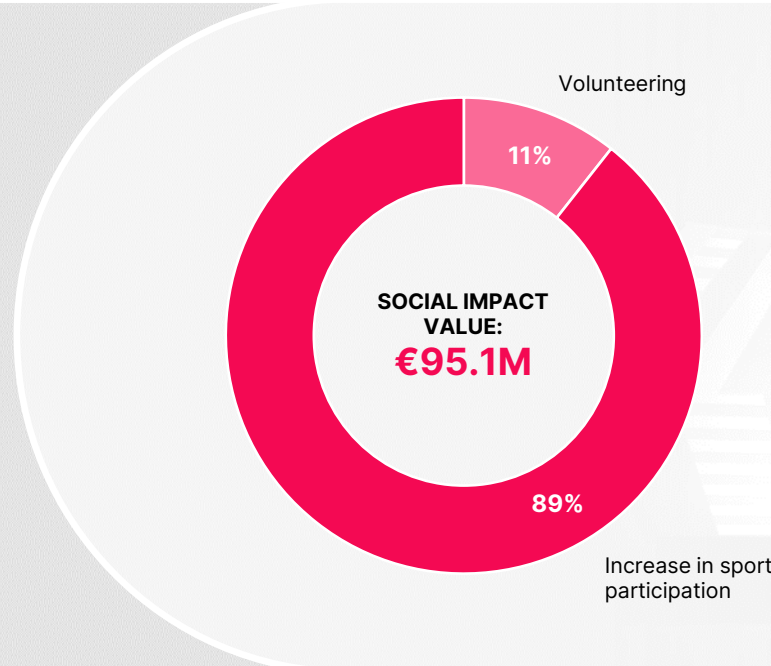


Overall Social Impact for Germany and related Host Cities amounts to €95M

Social Impact – Split by category



TOTAL SOCIAL IMPACT:
€95.1M



After attending UEFA EURO 2024, 26% of residents feel inspired to do more sports in their leisure time

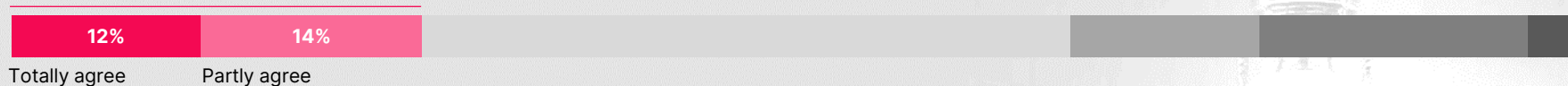
Social Impact – Increase in sport participation



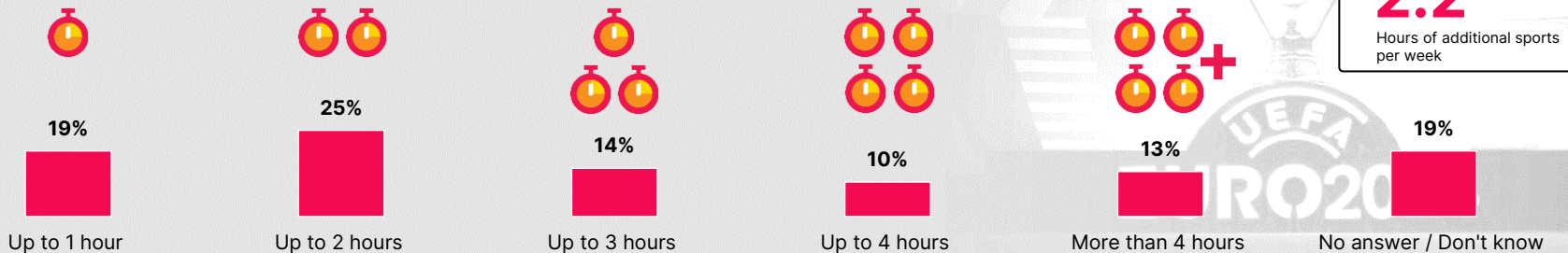
Resident Ticket Holders

By watching the matches of UEFA EURO 2024, I feel inspired to do more sports:

26% Top-2-Box



Additional hours per week doing sports because of UEFA EURO 2024:



Questions: To what extent do you agree with the following statements: By watching the matches of UEFA EURO 2024, I am motivated to do more sports in the future? How many additional hours per week will you do sports because you feel inspired by UEFA EURO 2024?
Sample size: 228 resident Ticket Holders

The inspiration effect practicing more sports leads to a decrease of €85M health costs in Germany

Social Impact – Increase in sport participation



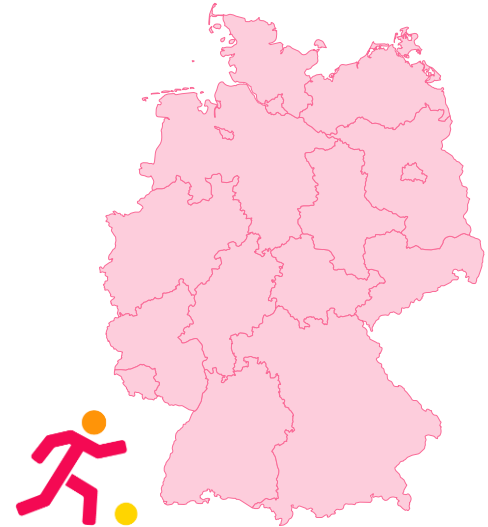
Resident Ticket Holders

Host Country

Resident visitors	16,244	Avg. of Host Cities
Inspired to do more sport Top-1-box	13%	Avg. of Host Cities
Additional hours of football per week	2.17	Avg. of Host Cities
Average duration motivation prevails*	12 weeks	Avg. national
Monetary value of one hour of sport**	€28.48	Avg national
Increase in sport participation - Value	€85.0M	Sum of individual Host City + Host Country calculation***



**SOCIAL VALUE
FROM REDUCED
HEALTH COSTS:
€85.0M**



* Average duration of New Year's Eve resolutions as proclaimed by Froböse (2020): 12 weeks

** Monetary value of one hour of sport for the health system calculations based on Dallmeyer, Wicker, Breuer (2020) & OECD figures

*** Total value is based on the addition of the individual calculations for each Host City. Multiplication of the above values leads to deviations in the total value.

The mission carried out within the UEFA Volunteering Program leads to a labour effect of €10M

Social Impact – Volunteering

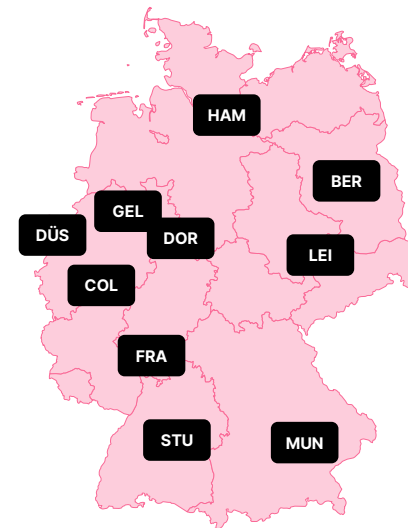


Host Country

Volunteers	13,247
Avg. event days per volunteer	8
Avg. daily hours per volunteer	8
Volunteering hours per volunteer	64
Minimum wage*	€12.41
Volunteering - Value	€10.1M



SOCIAL VALUE
VOLUNTEERING:
€10.1M



* In a conservative approach, the current minimum hourly wages in Germany were applied to calculate the value of volunteering
Source: UEFA accreditation data

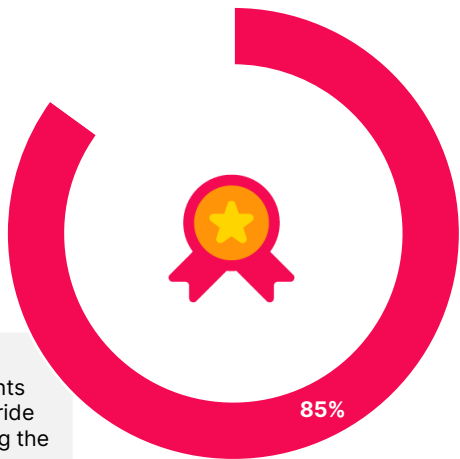
Host City residents derive a great deal of pride and joy from hosting the UEFA EURO 2024 event

Social Impact – Effects on the well-being of the residents



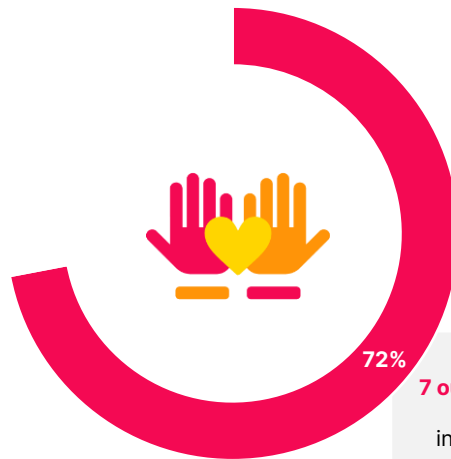
Resident Ticket Holders

Stronger sense of pride



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

Increased life satisfaction



7 out of 10 Ticket Holders from the Host Cities notice an increasing life satisfaction in relation to the event.

Question: To what extent do you agree with the following statements: Hosting UEFA EURO 2024 gave me as a citizen of Host City a sense of pride?
(5-point-scale: 1 = "Totally agree" to 5 = "Do not agree"; Top 2 Box)
Sample size: 1,827 residents visiting the event

The positive image strength of the event may lead to transfer effects and enhances the perception of the Host Cities

Social Impact – Image characteristics of the event & Host Cities

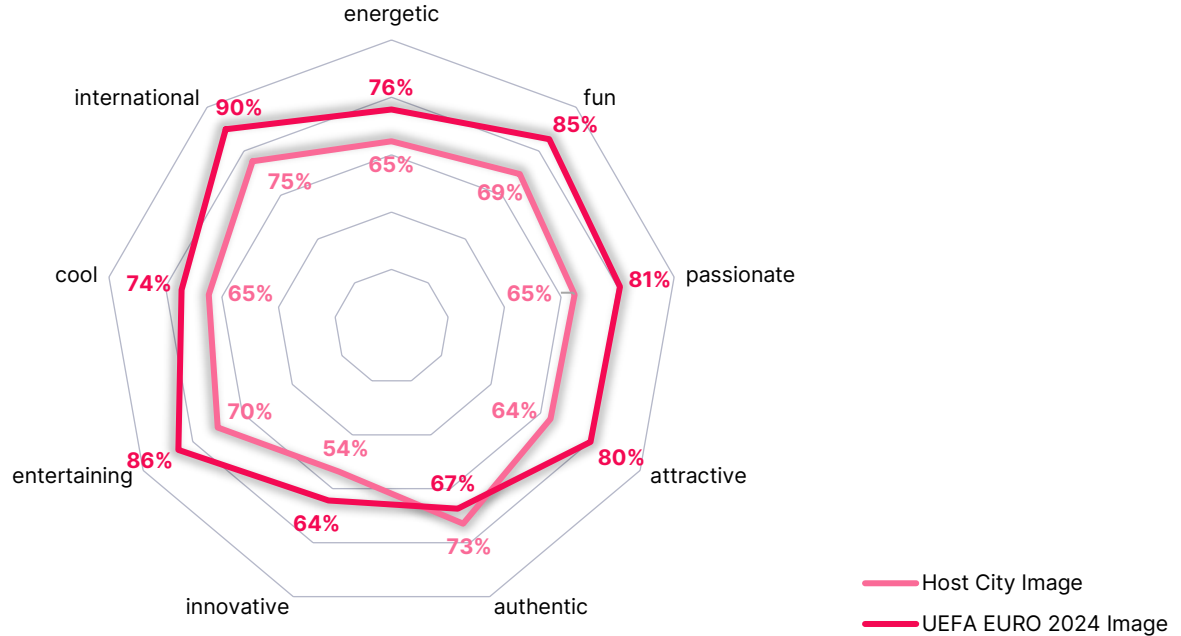


All Ticket Holders

The Host Cities are /
UEFA EURO 2024 is...

67%
Host Cities average Image Strength

78%
UEFA EURO 2024 Image Strength



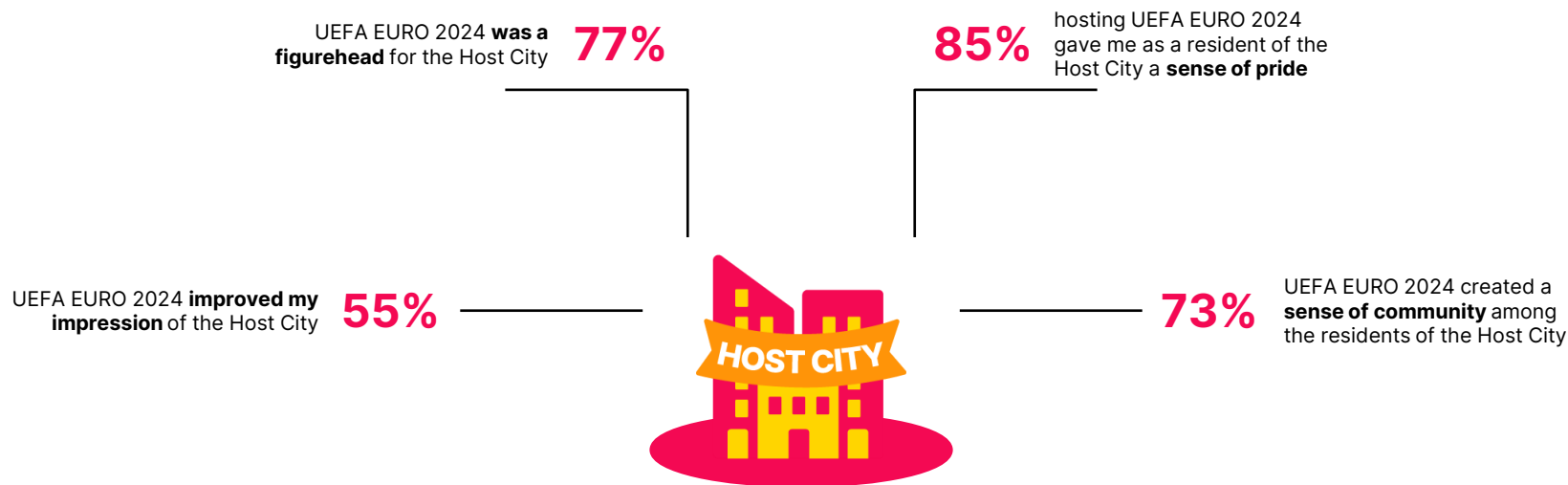
Questions: Now we would like to know your opinion about UEFA EURO 2024. Please indicate to what extent the following characteristics apply to UEFA EURO 2024 / Now we would like to know your opinion about the Host City of the event. Please indicate to what extent the following characteristics apply to Host City? (5-point-scale: 5 = "Doesn't fit at all" to 1 = "Fits completely"; Top 2 Box)
Sample size: 7,841 Ticket Holders of the event

The residents identify very strongly with UEFA EURO 2024 and recognize the added value for the Host City

Social Impact – Perception of event in Host City by residents



Resident Ticket Holders



Question: To what extent do you agree with the following statements? (5-point-scale: 1 = "Totally agree" to 5 = "Do not agree"; Top 2 Box)
Sample size: 1,827 residents visiting the event

Data Sources

Host Country Impact

UEFA EURO 2024
Germany

A mix of internal and external data sources...

Data sources

Parameter	Data sources	Slide
Ticket Holders		
Ticket Holder figures	UEFA Ticketing data	20
Unique Ticket Holders	UEFA Ticketing data, Nielsen Sports Market Research	20
Split by Origin	UEFA Ticketing Data	21
Characteristics	Nielsen Sports Market Research	22
Visiting Host City before	Nielsen Sports Market Research	23
Recommendation of a visit	Nielsen Sports Market Research	23
Revisit Host Country	Nielsen Sports Market Research	23
Perception of the Host City	Nielsen Sports Market Research	24

Parameter	Data sources	Slide
Economic Impact		
Ticket Holder spending	Nielsen Sports Market Research	28
Ticket Holder duration of stay	Nielsen Sports Market Research	29
Ticket Holder spending accommodation	Nielsen Sports Market Research	30
Ticket Holder transport	Nielsen Sports Market Research	31
Ticket Holder spending food and beverages	Nielsen Sports Market Research	32
Event Organizer spending	UEFA, EURO 2024 GmbH, Host City Data	33
Fan Zone Visitors spending	UEFA Fan Zone Data, UEFA Public Screening Data, Nielsen Sports Market Research	34
Accredited Persons spending	UEFA Accreditation Data, EURO 2024 GmbH Data, PNA Data, Nielsen Sports Market Research	25
Pub & At Home Recipients spending	Nielsen Sports Market Research, Nielsen Sports Expertise	36

...were applied for a comprehensive picture

Data sources

Parameter	Data sources	Slide
Media Impact		
Media Impact	Nielsen Sports Media Analysis	39-42 44-45
TV Audience	UEFA Audience Data	43
Social Media Listening	Nielsen Sports Social Media Analysis	48-52

Parameter	Data sources	Slide
Social Impact		
Increase in sport participation	Nielsen Sports Market Research, Froböse (2020), Dallmeyer et al. (2020), OECD	56-57
Volunteering	UEFA Accreditation Data, UEFA Volunteering Data, Market Intelligence Data	58
Effects on the well-being of the residents	Nielsen Sports Market Research	59
Image characteristics of the event & Host Cities	Nielsen Sports Market Research	60
Perception of event in Host City by residents	Nielsen Sports Market Research	61

Appendix

Host Country Impact

UEFA EURO 2024
Germany

Study Approach

Host Country Impact

UEFA EURO 2024
Germany

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.



For reliable results various data sources are applied for this research

Data sources

1

On-site studies among Ticket Holders...

...deliver insights on consumption and Ticket Holders' spending behavior at the event and in the Host Country.

2

Host / Host City / UEFA data...

...reveals local organizational revenues and spending of the event organizer, as well as missioning hours of volunteers.

3

Media data...

...quantifies the media value which is generated by the event for the Host Country and the Host Cities due to exposure in media.

4

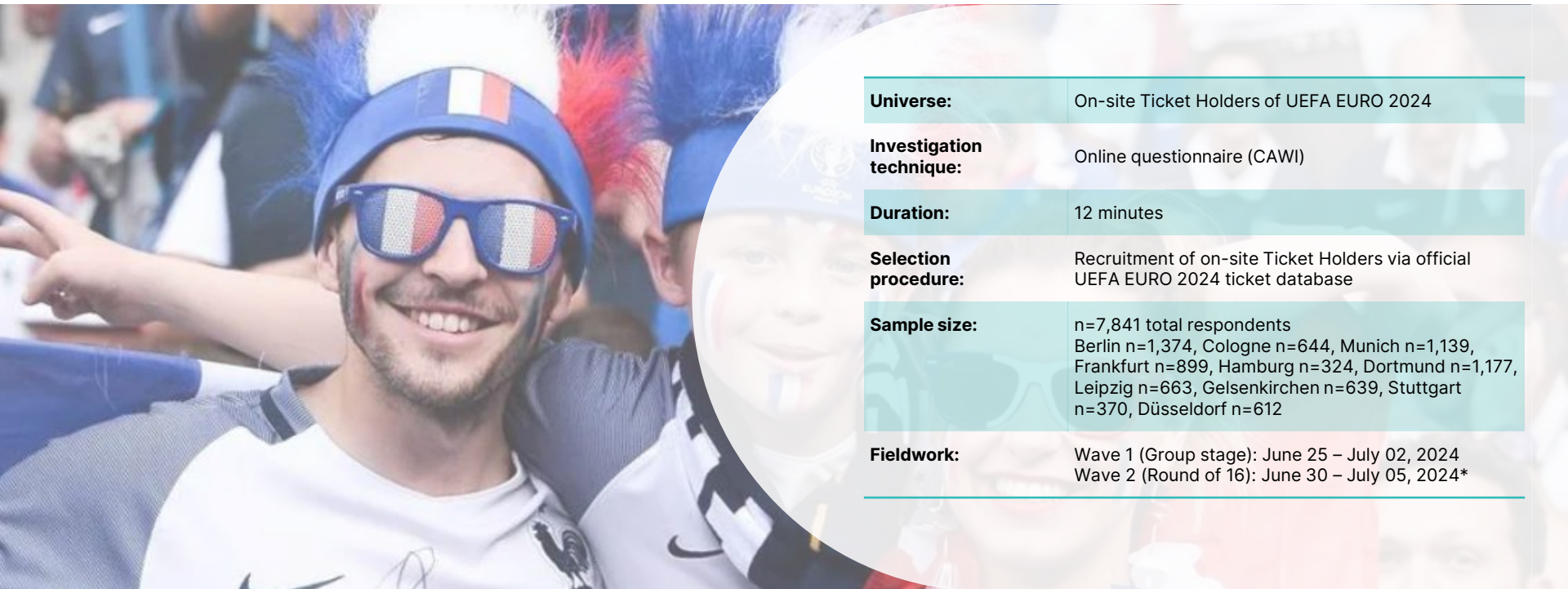
Expertise...

...to ensure the highest possible validity of the data, the figures are solidified using benchmarks and Nielsen Sports expertise.



For reliable results, almost 8k Ticket Holders were surveyed in two research waves

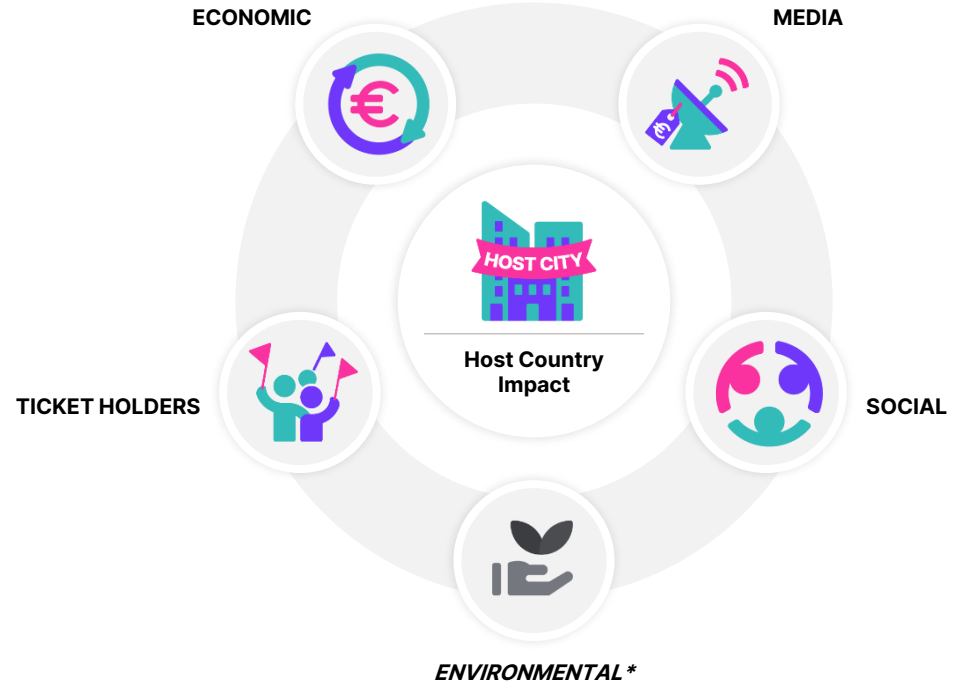
On-site study methodology



Universe:	On-site Ticket Holders of UEFA EURO 2024
Investigation technique:	Online questionnaire (CAWI)
Duration:	12 minutes
Selection procedure:	Recruitment of on-site Ticket Holders via official UEFA EURO 2024 ticket database
Sample size:	n=7,841 total respondents Berlin n=1,374, Cologne n=644, Munich n=1,139, Frankfurt n=899, Hamburg n=324, Dortmund n=1,177, Leipzig n=663, Gelsenkirchen n=639, Stuttgart n=370, Düsseldorf n=612
Fieldwork:	Wave 1 (Group stage): June 25 – July 02, 2024 Wave 2 (Round of 16): June 30 – July 05, 2024*

* Second wave for 8 of 10 Host Cities only as Hamburg and Stuttgart did not host a Round of 16 match.

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



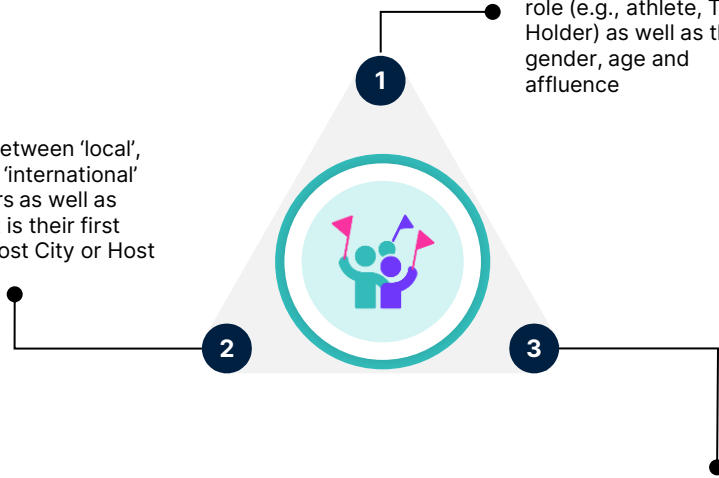
* It has been decided that the environmental impact will be considered in a separate as soon as more meaningful data and results are available.

We illustrate a clear picture of the Ticket Holders of UEFA EURO 2024

Ticket Holders

Residence

Breakdown between 'local', 'national' and 'international' Ticket Holders as well as recording if it is their first time to the Host City or Host Country



Demographics

Split out attendees by role (e.g., athlete, Ticket Holder) as well as their gender, age and affluence

Recommendation

Likelihood that Ticket Holders return or recommend a visit to the Host City to their friends & family



Direct economic impacts of the event as well as indirect effects were calculated

Economic Impact



DIRECT ECONOMIC IMPACT
generated by event attendees and the event organizer in the Host City



- ▶ Ticket Holders
- ▶ Fan Zones
- ▶ Pub & At Home recipients
- ▶ Accredited Persons
- ▶ Event Organiser

INDIRECT & INDUCED ECONOMIC IMPACT
through suppliers (indirect) and due to a growth in purchasing power in the Host City (induced)



- ▶ **Indirect impact**
Uplift of suppliers e.g., due to a higher demand
- ▶ **Induced impact**
Uplift in personal consumption due to higher incomes
- ▶ **Multiplier**
Direct & induced effect calculated with the help of a multiplier derived from the Marginal Propensity to Consume

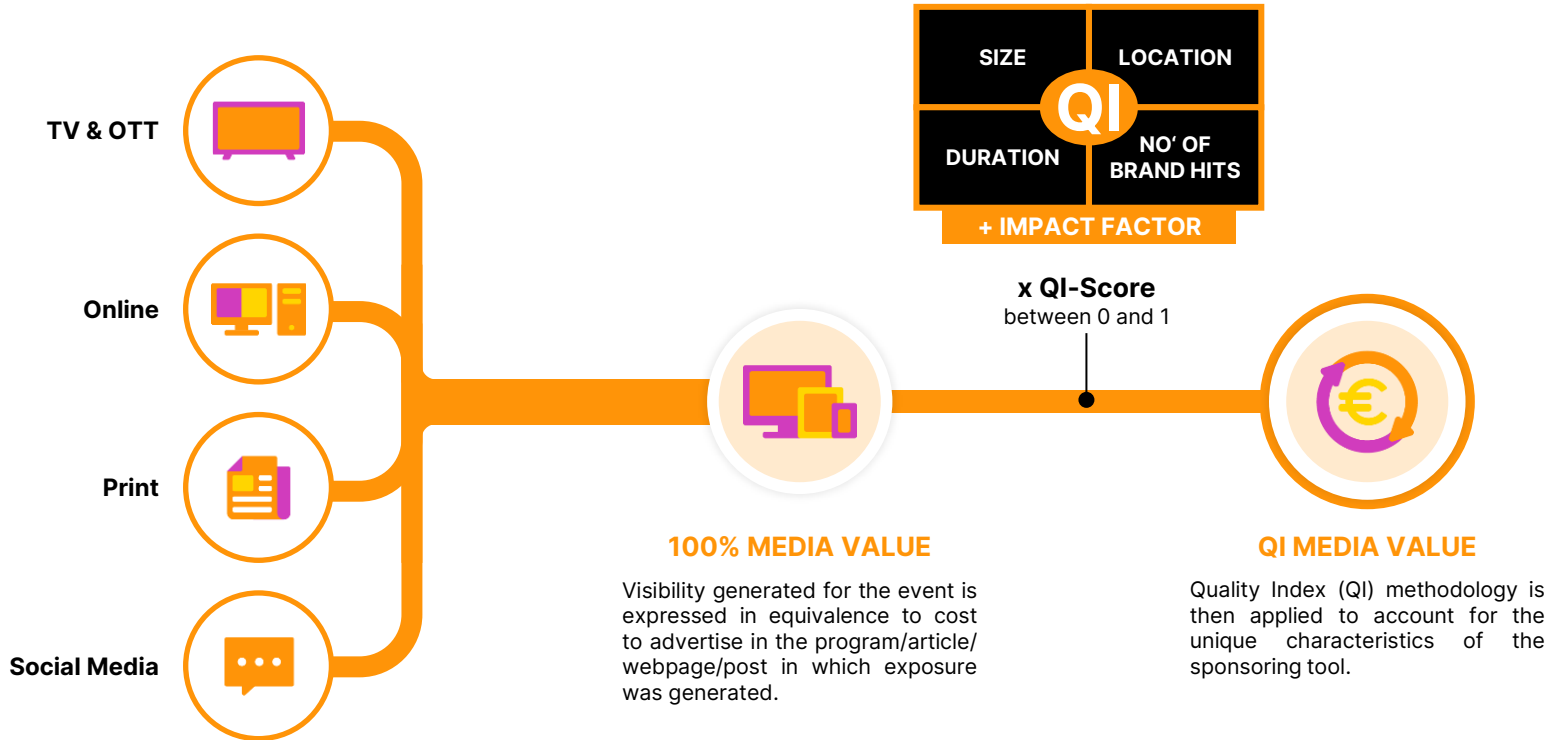
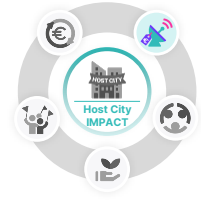


ECONOMIC IMPACT FOR THE HOST CITY

Nielsen Sports' methodology is widely accepted in academia

We monitored all relevant international channels of the event and calculated advertising equivalence values

Media Impact

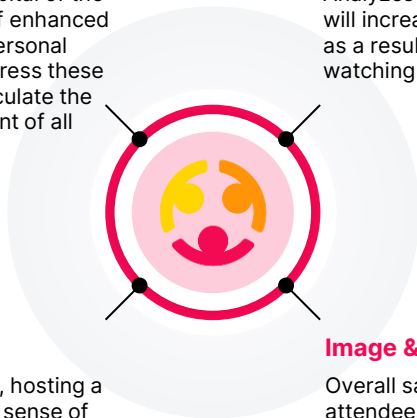


Social impacts regarded from several perspectives

Social Impact

Volunteering

Increases human capital of the volunteers in view of enhanced skillsets and inter-personal connections. To express these benefits, we will calculate the labour cost equivalent of all volunteering.



Pride

As one major output, hosting a sport event brings a sense of pride to the Host City/Country. This is directly connected to the life satisfaction of their residents.

Sport participation

Analyzes whether residents will increase their participation as a result from visiting or watching the event.

Image & satisfaction

Overall satisfaction levels of all attendees with their event experience as well as enhanced reputation of the Host City potentially leading to further tourism revenues.



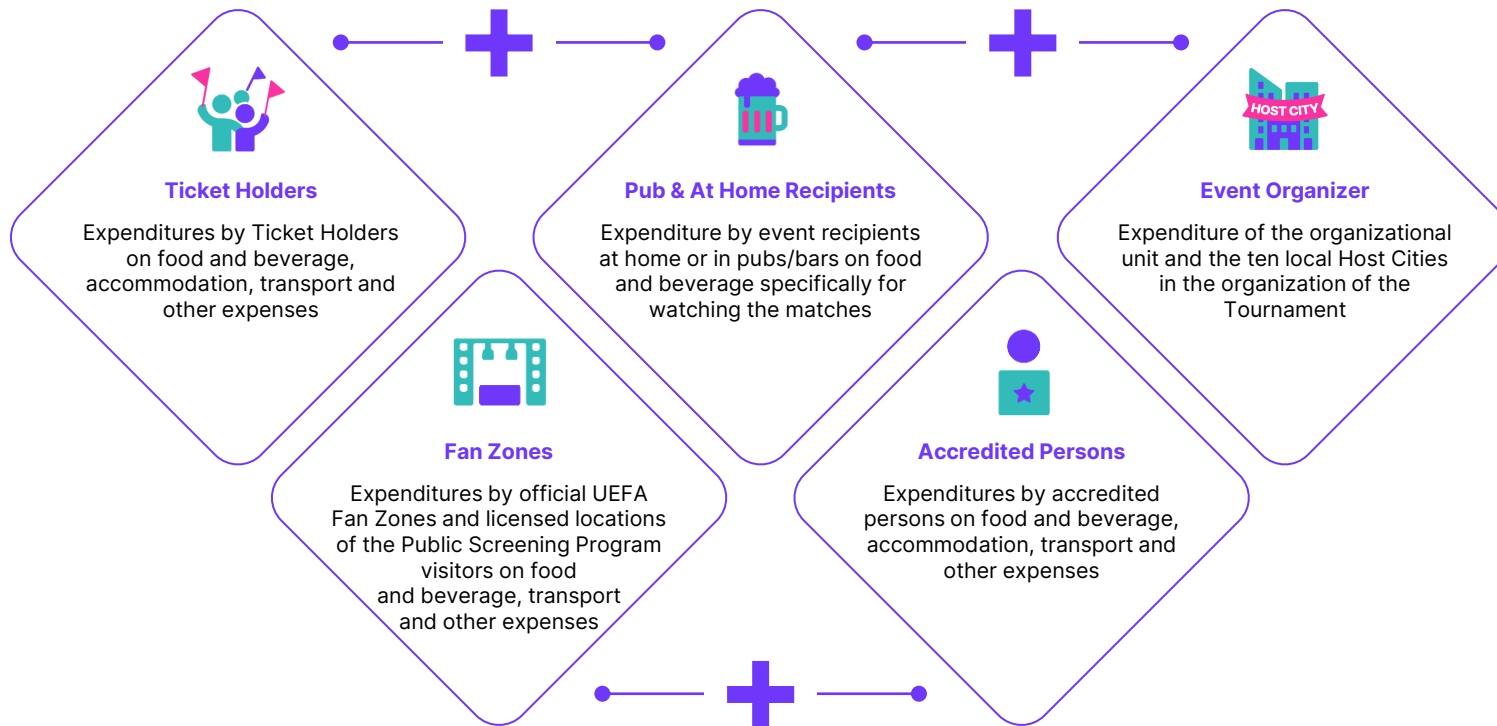
Economic Impact Host Country Impact

UEFA EURO 2024
Germany



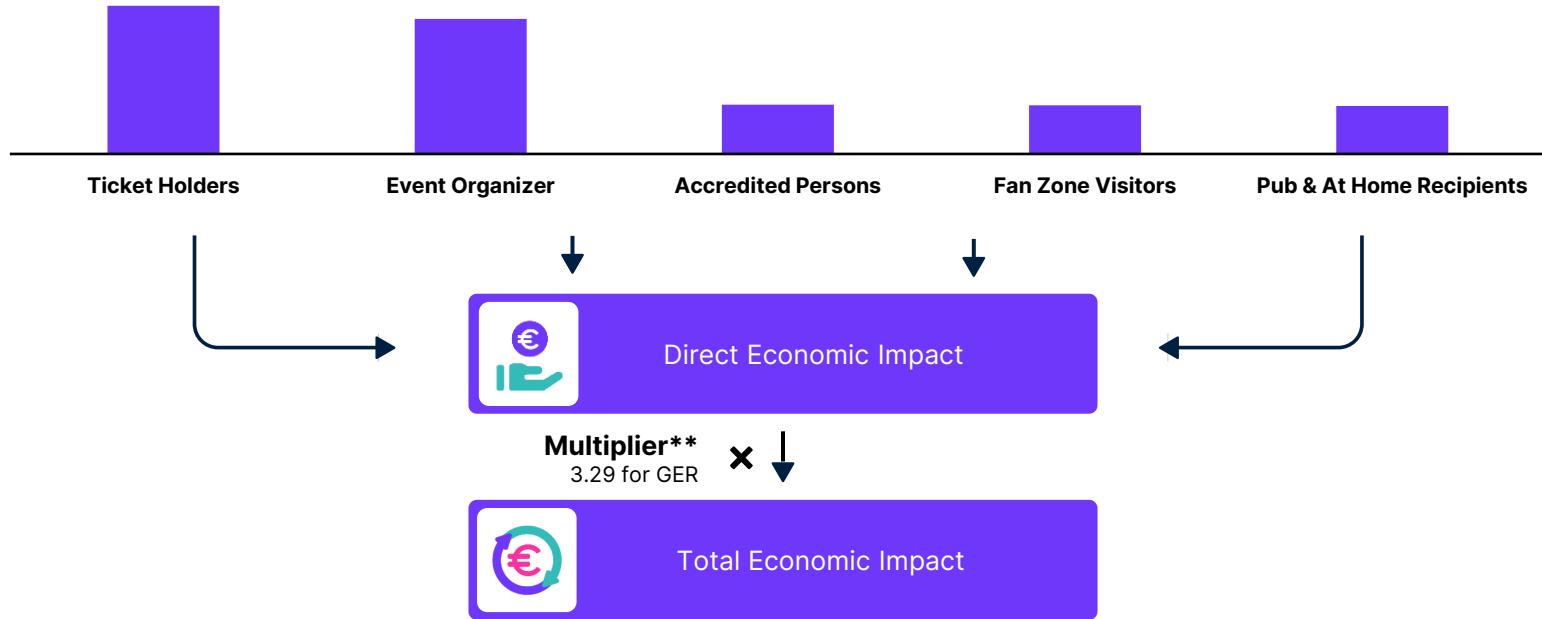
The output components of all relevant stakeholders were included in the calculation of the economic impact

Economic Impact – Components considered



Economic Impact Methodology

Economic Impact – Calculation of Total Economic Impact



* The calculation of the multiplier is outlined on the following pages

Economic Impact Methodology

Economic Impact – Components

Direct Economic Impact

The calculated values express the direct spending of Ticket Holders, the event organizer and other participants (e.g., national team delegations, UEFA officiating team, media) that is attributable to UEFA EURO 2024 matches.

Consumption behavior of Ticket Holders is calculated based on the findings of the on-site market research study. Expenses must be attributed to the event visit (e.g., travelling to the event venue or spending on-site) or, if further expenses occur during the journey and stay in the Host Cities, visiting UEFA EURO 2024 must be the primary reason for the trip. To ensure validity of the data and to avoid overestimation of personal spending, Nielsen Sports has used its wealth of international benchmarks from other events to solidify the statistics.

Local spending of the event organizer, participants etc. is based on commercial data of UEFA, the hosts cities and additional estimations.

For any expenditure, only the portion of money spent inside the Host City is relevant to the calculation. For example, travel expenses of Ticket Holders are only included as far as local companies are involved (e.g., local purchase of fuel, taxi, locally-based airline); organizational spending of the event organizer was only considered when pocketed by local service providers.

Induced Economic Impact

Based on the direct economic impact, further impact effects are generated on subsequent steps of the value-added chain. The direct spending causes employment effects, leading to increased private consumption due to the growth in purchasing power.

To calculate this induced impact, an economic multiplier is used. The multiplier is based on statistical data on the marginal propensity to consume within an economy and comprises the economic multiplier effect* generated by the direct impact.

* The calculation of the multiplier is outlined on the following pages

Economic Impact Methodology

Economic Impact – Calculation of multiplier

Based on widely accepted economic modelling, the multiplier is defined as:

$$\text{Multiplier} = 1 / (1 - \text{MPC})$$

MPC stands for the Marginal Propensity to Consume in the respective country, representing the share of each additional € 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.

Obtaining the respective data for several past years (2007-2023) from World Development Indicators of World Bank, the consumption function for Germany can be estimated:

$$\text{Consumption (y)} = 0.6956 \times \text{Income (c)} + 112,000,000,000 \text{ (€)}$$

- The MPC is expressed as the derivative of the consumption function:

$$\text{MPC} = 0.6956$$

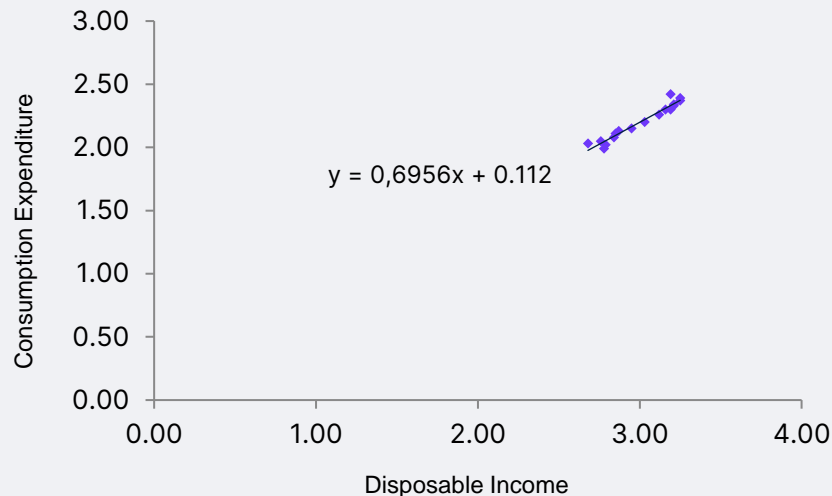
- Thus, in Germany, an estimated share of €0.70 of every additional € earned is spent on consumption and therefore generates additional economic impact.

- Given this estimated MPC, the Multiplier can be calculated as follows:

$$\text{Multiplier} = 1 / (1 - 0.6956) = 3.29$$

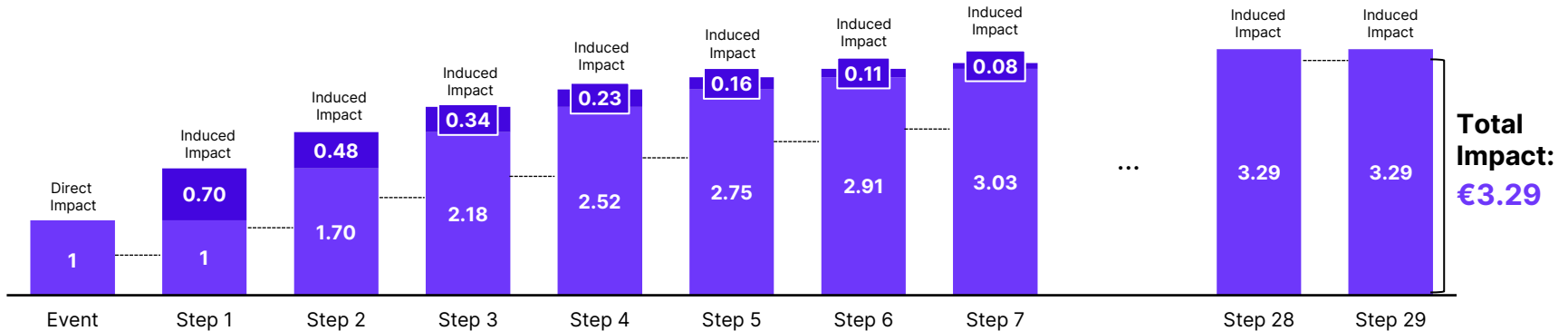
Consumption expenditure vs. disposable income

Germany (in €Trillion)



Economic Impact Methodology

Economic Impact – Explanation of induced impact



- The idea of the Economic Multiplier and the Marginal Propensity to Consume can be illustrated with an example: The Ticket Holder staying in a hotel spends money for accommodation (Direct Impact). Using this money, the hotel employs staff and invests in its business – the first level of Indirect Impact. Consequently, the employees also spend their (higher) income on personal consumption, leading to further Induced Impact. The Total Impact is the sum of the impact generated on each level.
- As mentioned before, a share of €0.70 of every additional € earned is spent on consumption. Therefore, €1.00 of direct (event-related)

spending generates an Induced Impact of €0.70 in the first step. Consequently, this Induced Impact induces impact itself in the second step ($€0.70 \times 0.70 = €0.48$). This effect continues indefinitely with decreasing values. Due to the infinitesimal character of this series, the total sum can be calculated using the formula as outlined on the previous page.

- In total, Direct Impact and Induced Impact of every Euro spent totals €3.29. The Direct Economic Impact therefore must be multiplied by 3.29 to calculate the Total Economic Impact generated by the UEFA EURO 2024 in Germany.

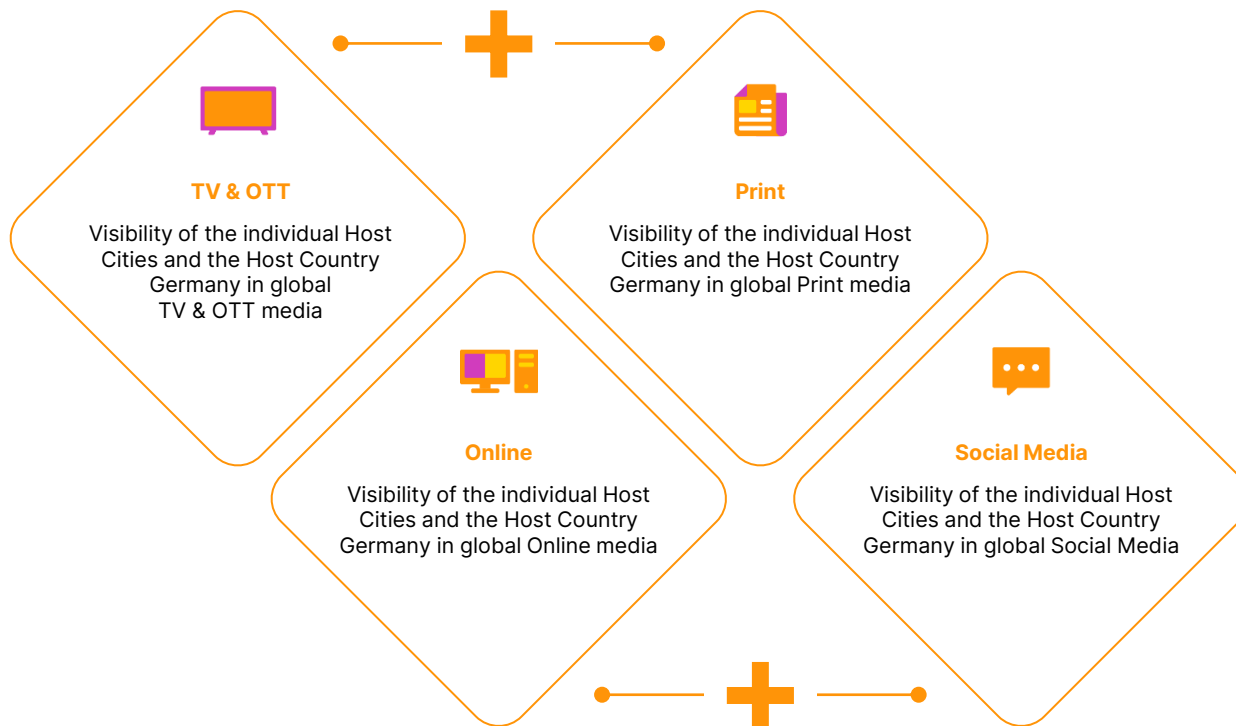
Media Impact Host Country Impact

UEFA EURO 2024
Germany



For the media impact, the visibility of the Host Cities and the Host Country was analysed globally across all media genres

Media Impact – Components considered










In order to analyse the media impact for the event, a cross-media analysis was conducted

Media Impact – Setup Media Evaluation



Objects:	Competition
Event-related visibility of Host Cities & Host Country	UEFA EURO 2024

Analysis Type	Full Analysis (Basis)			Extrapolation (Final Output)			Full Analysis
Media Type							
Monitoring Period	14 June – 30 June 2024			14 June – 14 July 2024			14 June – 14 July 2024
Programme Types	Live	All event-related articles	-	Live & Repeats	All event-related articles	All event-related articles	Facebook, Instagram, Twitter/X
Markets	Top-10 participating and top-3 non-participating nations*	Global	-	All markets globally according to rights holders list provided by UEFA	Global		Global
KPI	<ul style="list-style-type: none"> Broadcast Duration Audience CPT / spot rates 	<ul style="list-style-type: none"> # Articles Impressions CPT 	-	<ul style="list-style-type: none"> # Media Outlets # Broadcasts / Articles Event Value (monetary value of the event's media coverage based on advertising rates) 			<ul style="list-style-type: none"> Impressions Engagements
Extrapolation Approach	<ul style="list-style-type: none"> TV & Online: Results from the first 2 event weeks are extrapolated to the full event based on results from EURO 2020 and expertise by Nielsen Sports. Print: Results from the Online Media Evaluation are extrapolated to Print Media based on expertise by Nielsen Sports. <p>NB: Such an extrapolation approach is widely used in the industry and delivers robust results while being cost-efficient. The full analysis needs to be cut-off after the first 2 event weeks to meet the required deadline for the final report.</p>						-

TV media evaluation

Media Impact – Brand exposure analysis

100% MEDIA EQUIVALENCY

In this value calculation, the visibility generated for the sponsor is expressed in equivalence to cost to advertise in the programme in which exposure was generated. These rates are either determined through a 30' second CPT and the audience of the programme in which the exposure took place or are taken from official rate cards provided by the broadcasters.

Formula:

$$\frac{\text{Visibility in sec.} \times \text{CPT in EUR} \times \text{Audience in millions}}{30 \text{ seconds} \times 1,000}$$

$$\frac{\text{Visibility in sec.} \times \text{Spot price 30 sec. in EUR}}{30 \text{ seconds}}$$

Example:

120 seconds of visibility in a programme, in which the booking of a 30 second advertisement would have cost 2,000 EUR:
(120 seconds x 2,000 EUR) / 30 seconds = 8,000 EU

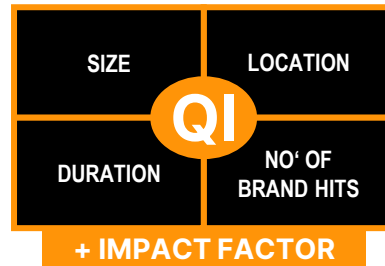
QUALITY INDEXED MEDIA VALUE

To facilitate the calculation of the Quality Indexed (QI) Media Value, an impact based “Quality Index Score” is calculated uniquely for brand sequences detected during analysis. The QI score of brand exposure is determined through five factors and then applied as a weighting for the value calculation. The purpose of the QI score is to assess brand exposure not only quantitatively, but also qualitatively, based on their impact.

The following five criteria combine to derive the QI score:

Size of the advertising message in proportion to the screen (on screen size)

The total duration on screen for the exposure



Proximity to the centre of the screen

No' of simultaneously visible advertising messages for the brand, referred to as hits i.e. logos and massaging

Formula:

$$100 \% \text{ Media Equivalency} \times \text{QI Score}$$

Example:

Exposure with a 100% Media Equivalency of 1,000 EUR and a QI Score of 27.5 would equal 275 EUR

Online media evaluation

Media Impact – Brand exposure analysis

100% MEDIA EQUIVALENCY

For brand exposure detected in imagery, the 100% Media Equivalency takes into account the cost to advertise for the area of the whole picture on the page in which the brand exposure was generated. For this valuation method, the generated sponsorship impressions are calculated against the CPT's for standard online advertising. The standard reference is either a banner, e.g., for single mentions, or an advertorial in the case of articles that can be completely allocated to the sponsor. The impressions are weighted according to the type of site carrying the exposure, informed by metered site data and both online behavioral market research and sports interest level market research.

Formula:

$$\frac{\text{Sponsorship Impressions (weighted)} \times \text{CPT in EUR}}{1,000}$$

QUALITY INDEXED MEDIA VALUE

To facilitate the calculation of the Quality Indexed (QI) Media Value, an impact based “Quality Index Score” is calculated for branding detected in the picture or article. The QI score of brand exposure is determined through five factors and then applied as a weighting for the value calculation.

The following five criteria combine to derive the QI Score:



Formula:

$$100 \% \text{ Media Equivalency} \times \text{QI Score}$$

Social media evaluation

Media Impact – Brand exposure analysis

POST

Post is the general term for any original content that is published within a social network. Therefore, the term also includes content that is designated differently in individual social networks (e.g., Tweet within Twitter).

PROCEDURE FOR BRAND EXPOSURE ANALYSIS

All sponsorship exposure in which the sponsor is at least 80% legible is accounted for.

MEDIA VALUE

For this valuation method, the reach achieved (from impressions or length-weighted video views) of posts with visibility of the sponsor, will be related to the cost per thousand (CPT) that would be paid on the respective platform for delivering advertising messages.

Formula:

$$\frac{CPT \text{ in EUR} \times \text{Post Reach}}{1,000}$$

In order to determine the post reach for the above calculation, the provided figures from the profile owner (impressions, video views and playing time) for each individual post are taken into account.

In the case that no official impression figures are provided, the potential impressions are calculated based on publicly available indicators, such as the number of followers and far-reaching post engagements (likes, comments and shares). These are multiplied with a platform specific probability to read the post, which is continuously determined by Nielsen Sports based on market research data.

For video posts the reach is calculated through the number of video views, the average playing time and the total duration of the video as well as the duration of the sponsor's exposure.

Formula:

$$\frac{\text{Visibility in sec.} \times \text{Video views} \times \text{CPT}}{30 \text{ seconds} \times 1,000}$$

For the media valuation of video posts, the sponsor's visibility is calculated against the price of a 30 second spot on the relevant platform. These spot prices are sourced from officially published CPTs for sponsored newsfeed posts.

Social media evaluation

Media Impact – Brand exposure analysis

QI ADVERTISING VALUE

The sponsor visibility factor (Quality Index) takes further qualitative parameters into consideration, weighting the “classic” media value. Influencing factors include: the relative size of the advertising message in proportion to the picture/ post, the position and clarity of the advertising message as well as the number of simultaneously visible advertising messages. Finally, the type of a mention also affects the weighting factor. Accordingly, a mention within a picture is weighted higher than a text mention within a post.

The QI Advertising Value is calculated by multiplying the (unweighted) media value based on spot price / CPT (“media value”) with the Quality Index.

Formula:

$$\frac{CPT \text{ in EUR} \times \text{Post Impressions} \times \text{Quality Index}}{1,000}$$

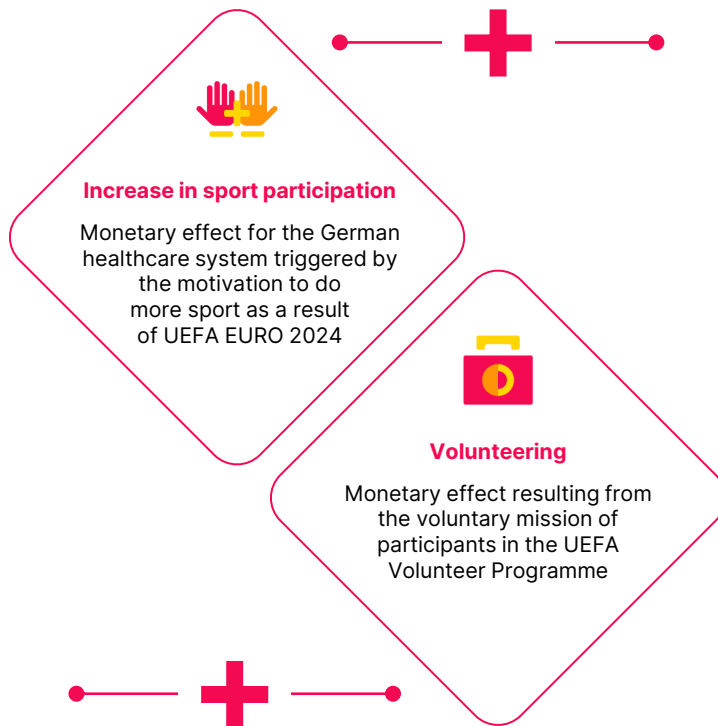
Social Impact Host Country Impact

UEFA EURO 2024
Germany



The motivation to do more sport and the UEFA Volunteer Programme result in monetary effects

Social Impact – Components considered



Contact Details

Host Country Impact

UEFA EURO 2024
Germany

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