

”A time to make friends™“

The 2006 FIFA World Cup™

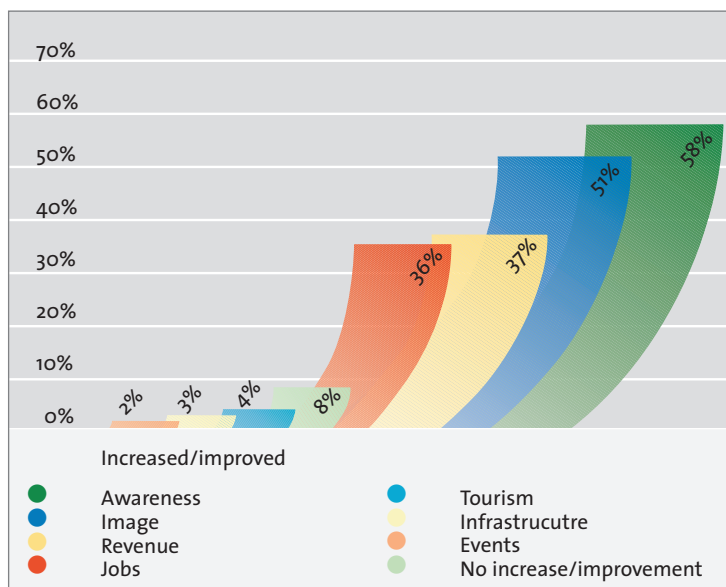
and its effect on the image and economy of Germany





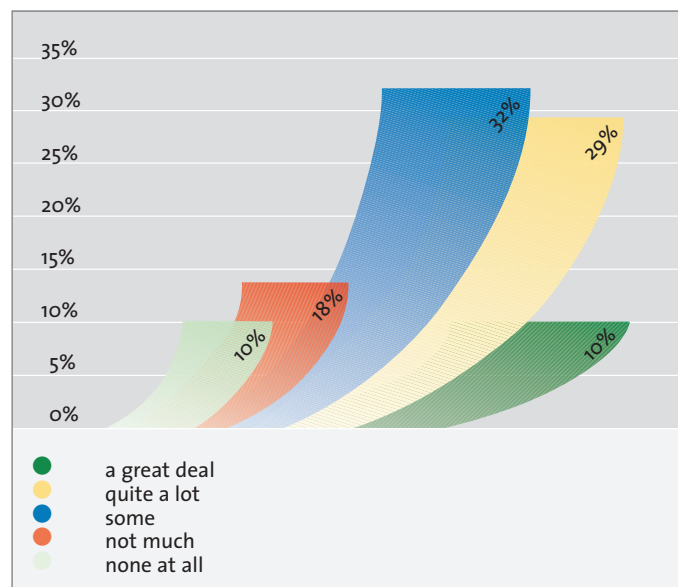
HOW THE GERMAN POPULATION SAW IT

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?



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

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



Source: Prof. Alfons Madeja – Survey of Germans taken 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 1.5 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™

Host city	Stadium capacity for the 2006 FIFA World Cup™	Construction costs in million euros	Expenditure on transport infrastructure in million euros
Berlin	66,021	242	486
Dortmund	60,285	36	28
Frankfurt	43,324	126	53
Gelsenkirchen	48,426	186	58
Hamburg	40,226	105	1312
Hannover	39,297	64	304
Kaiserslautern	41,513	71	123
Cologne	40,590	117	90
Leipzig	38,898	116	596
Munich	59,416	340	301
Nuremberg	36,898	56	30
Stuttgart	47,757	51	198

Source: Gerd Ahlert, Institute of Economic Structures Research (GWS), Nov. 2005

The impact of foreign visitors to Germany

Scenario in billion euros	2006	2007	2008	Total
Gross domestic product	1.25	0.37	0.03	1,65
of which consumer spending	0.52	0.39	0.07	0.98
Capital investment	0.13	0.05	-0.04	0.14
Exports	1.02	0.04	0.01	1.07
Imports	0.42	0.11	0.00	0.53
Tax revenue	2.32	0.58	0.04	2.94
Steueraufkommen	0.286	0.089	0.013	0.388
Workforce	14,539	47	1,180	15,766

Source: GNTB, GWS, Nov. 2005

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

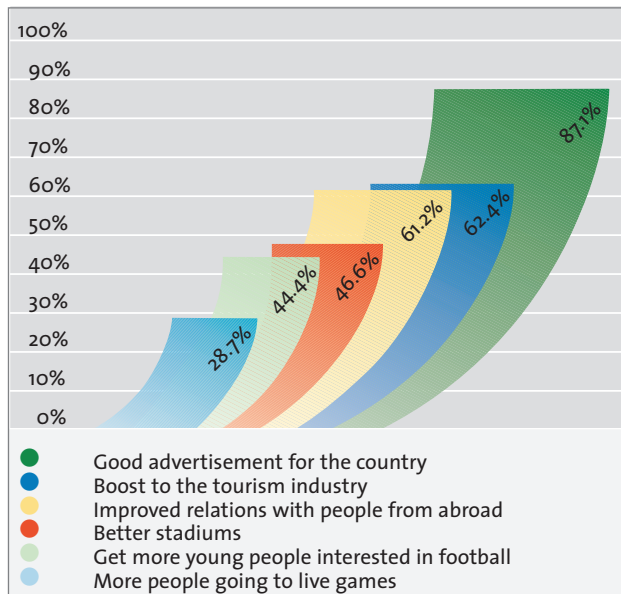
The 2006 FIFA World Cup™ presents numerous opportunities for promoting Germany as a travel destination. The German National Tourist Board (GNTB) expects the event to attract a total of around five million additional overnight stays by domestic and international visitors. The huge numbers of football 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



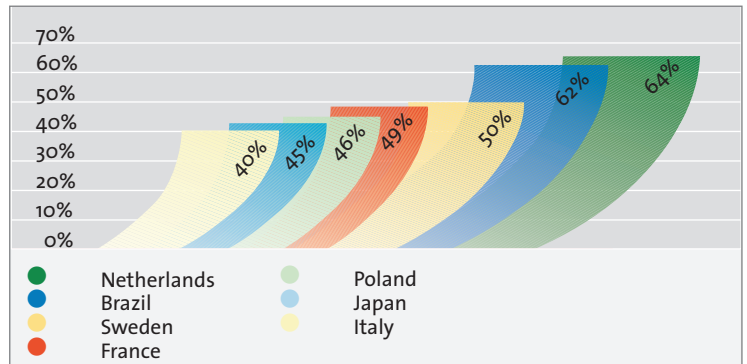
HOW GERMANY IS PERCEIVED ABROAD

How do you expect Germany to benefit from hosting the 2006 FIFA World Cup™?



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)



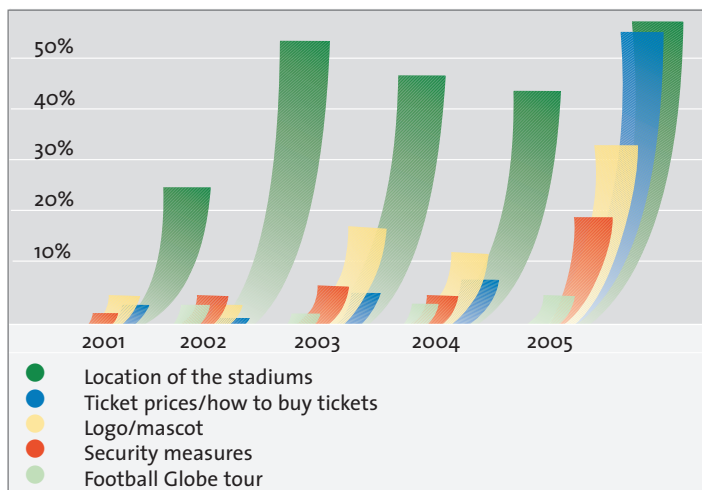
Around six months before the 2006 FIFA World Cup™ kicked off, the proportion of those surveyed who know that the tournament is being held in Germany ranges from 40 per cent (Italy) to 64 per cent (Netherlands). In Germany, the proportion of the population with a moderate to strong interest in the 2006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

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

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

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

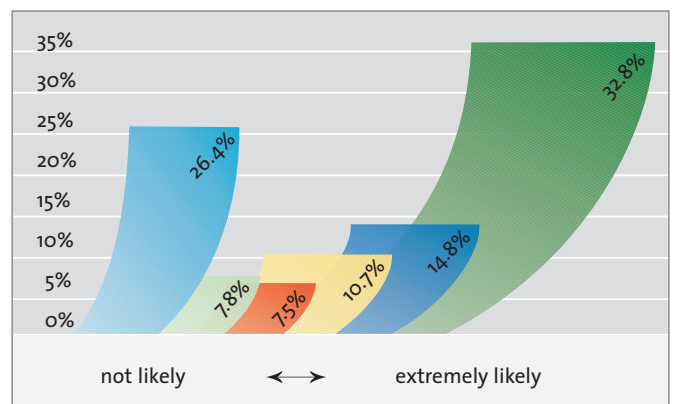
Source: University of Hohenheim, Marketing Reports: survey in the run-up to the 2006 FIFA World Cup™



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™

How interested in football are people in Germany?

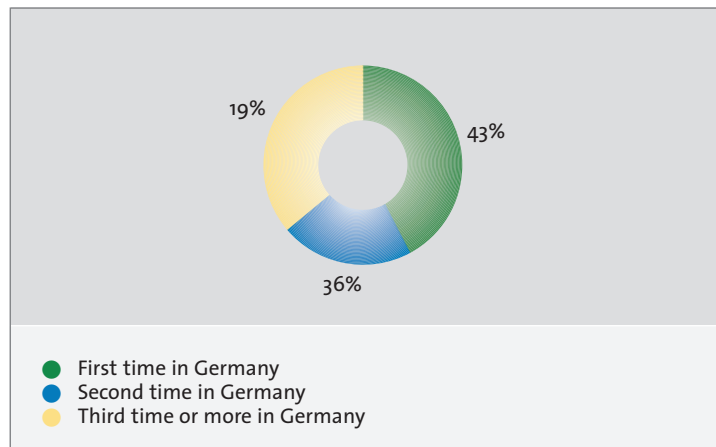
	very interested	just interested	not interested
Men	57%	26%	17%
Women	15%	33%	52%

Source: Sportfive – marketing and market research: Sportprofile, Allensbach Market and Media Analysis 2005

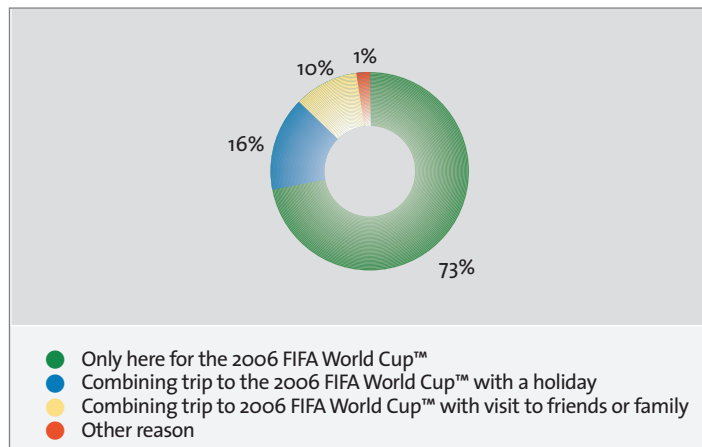


A TIME TO MAKE FRIENDS

Previous visits to Germany



Reasons for travel to Germany

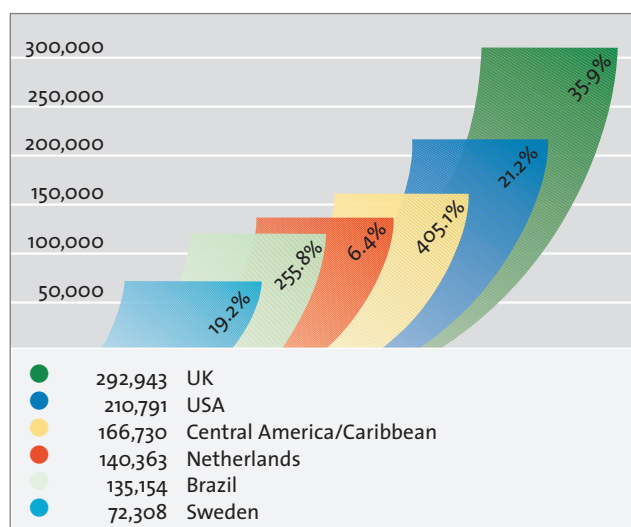


The aim of opening Germany up to new groups of customers has been achieved. Three quarters of those surveyed had come to Germany specially for the 2006 FIFA World Cup™ and for almost half of respondents this was their first visit (43 per

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.

Source: GNTB/TNS Infratest: 1,281 people visiting the host cities of Berlin, Dortmund, Hamburg, Cologne and Munich from all corners of the globe were asked about their experiences of Germany during the group stage of the World Cup.

Increase in overnight stays June/July 2006



Source: GNTB/Federal Statistical Office, June/July 2006

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

	Total %	Foreign %	Domestic %
Frankfurt	27.4	43.8	11.3
Nuremberg	18.4	108.2	-16.5
Munich	-4.4	17.4	-23.5
Leipzig	17.9	118.1	-3.8
Gelsenkirchen	10.7	262.7	-19.6
Kaiserslautern	30.2	80.6	6.8
Cologne	21.6	107.0	-14.3
Hamburg	12.9	57.1	0.6
Dortmund	45.3	285.6	-3.3
Berlin	-2.6	31.2	-18.8
Hannover	7.0	56.6	-14.1
Stuttgart	11.9	90.9	-19.2

Source: Bangerth 2007, based on data from the regional statistical agencies

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Norbert Tödter
 Head of Business Planning
 and Marketing Research,
 project leader for the nation-
 wide service and friendliness
 campaign

We would like to express our special
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 ried out before, during and after the
 2006 FIFA World Cup™, selected results
 of which are used in this brochure

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Country	FIFA World Cup™ base
Angola	Celle
Argentina	Herzogenaurach
Australia	Öhringen
Brazil	Königstein/BG
Costa Rica	Heidelberg
Germany	Berlin
Ecuador	Bad Kissingen
Ivory Coast	Niederkassel
England	Baden-Baden
France	Aerzen/Hamlyn
Ghana	Würzburg
Iran	Friedrichshafen
Italy	Duisburg
Japan	Bonn
Croatia	Bad Brückenau
Mexico	Göttingen



Country	FIFA World Cup™ base
Netherlands	Freiburg
Paraguay	Oberhaching
Poland	Barsinghausen
Portugal	Bonn
Saudi Arabia	Bad Nauheim
Sweden	Bremen
Switzerland	Bad Bertrich
Serbia& Montenegro	Billerbeck
Spain	Kamen
South Korea	Bensberg
Togo	Wangen
Trinidad & Tobago	Rotenburg a. d. W.
Czech Republic	Westerburg
Tunisia	Schweinfurt
Ukraine	Potsdam
USA	Hamburg

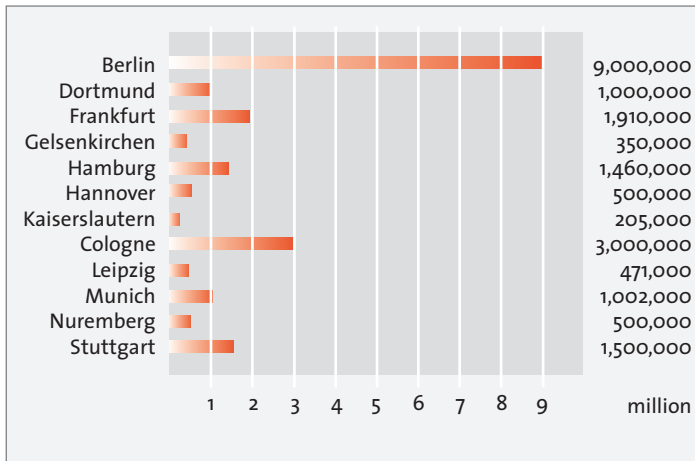
Distribution of tickets by country

	Percentage of available tickets	Number of tickets
Germany	58.6	1,263,154
Participating countries with the most spectators		
Great Britain and Northern Ireland	3.9	83,288
USA	3.2	70,005
Japan	2.9	62,046
Switzerland	2.8	59,469
Sweden	2.6	55,788
Other participating countries	21.5	463,280
Non-participating countries with the most spectators		
Austria	0.7	14,153
Canada	0.5	9,908
Finland	0.3	6,182
Denmark	0.2	5,387
Russian Federation	0.2	4,482
Other non-participating nations	2.7	57,913
Total	100	2,155,055



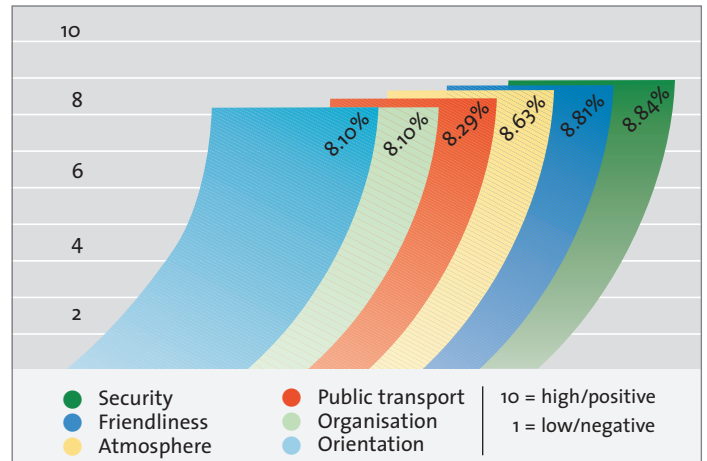
FOOTBALL FEVER IN GERMANY

Around 21 million people visited the FIFA Fan Fests



Source: GNTB survey in the FIFA World Cup Host Cities, July 2006

2006 FIFA World Cup™ group-stage audit



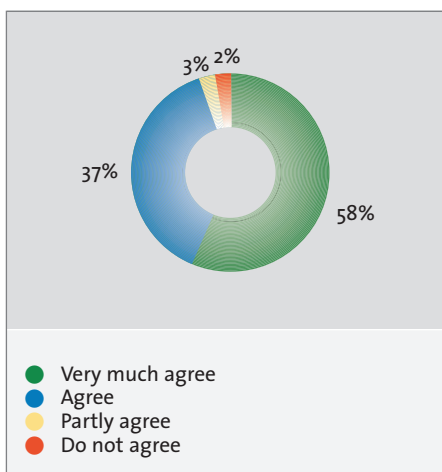
Source: AIESEC Leipzig – World Cup audit

Around 21 million people visited the official 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.

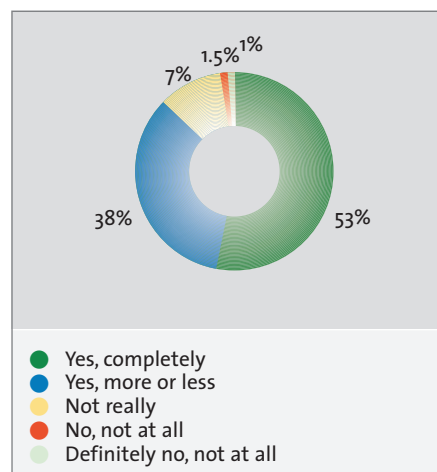
How do you rate the atmosphere in Germany?

The German people have given me a friendly welcome.



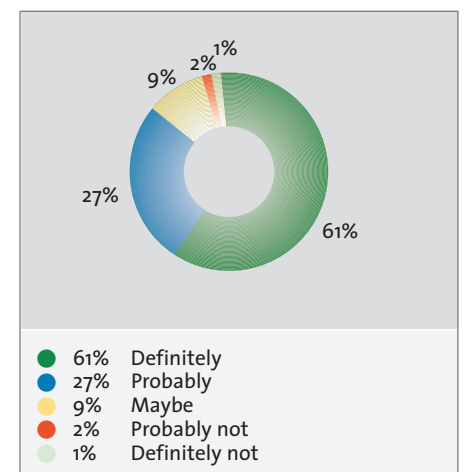
95 per cent of those surveyed found the majority of German people to be friendly.

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.

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

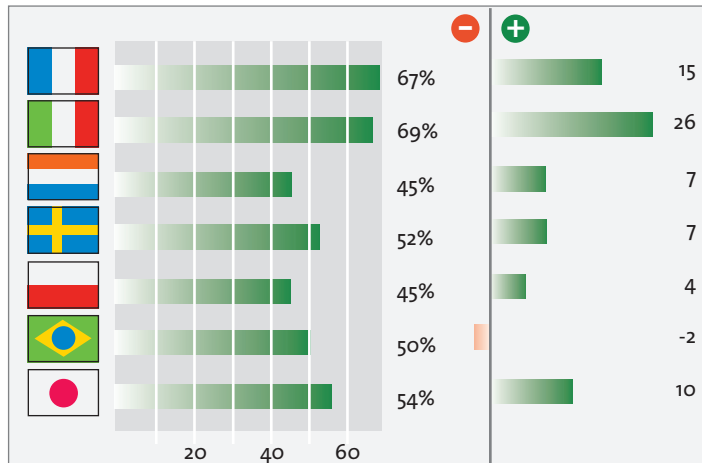
Source: Prof. Alfons Madeja – Report on the World Cup concept

Source: GNTB/TNS Infratest – visitor survey



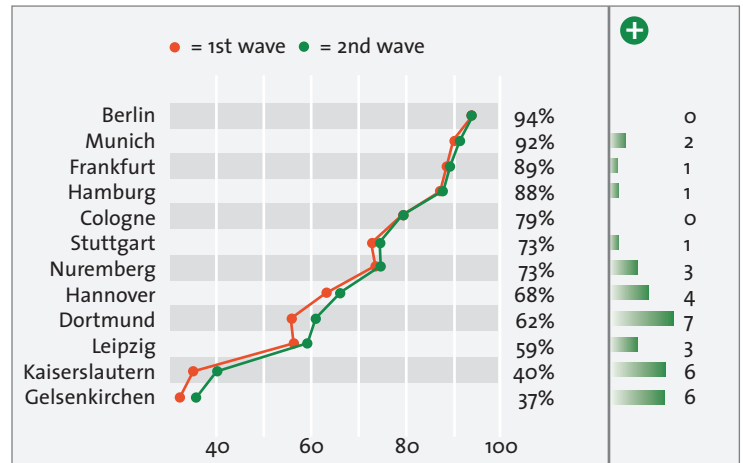
IMAGE BOOST

Interest in the 2006 FIFA World Cup™



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

Awareness of the FIFA World Cup Host Cities



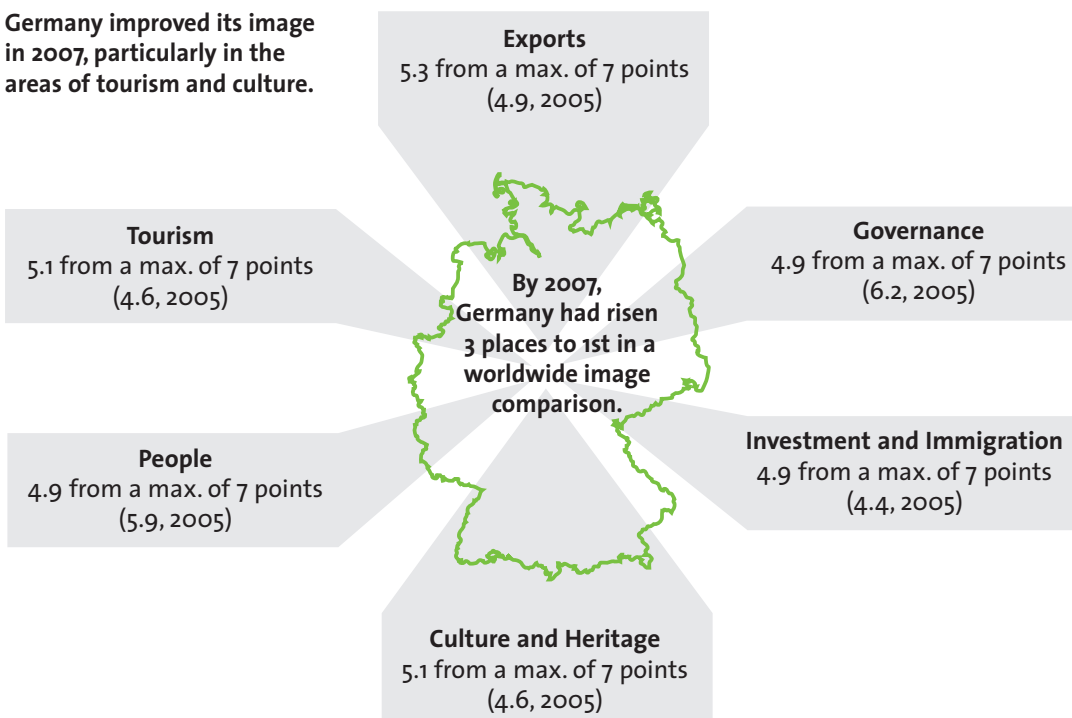
Source: GNTB/TNS Infratest – Image Boost, Nov. 2005, Sep./Oct. 2006

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.

VERDICT

Germany improved its image in 2007, particularly in the areas of tourism and culture.



Source: GNTB/Anholt-GMI 2005, 2007 (2007 figures refer to Q4/2007; 2005 comparative figures in brackets)

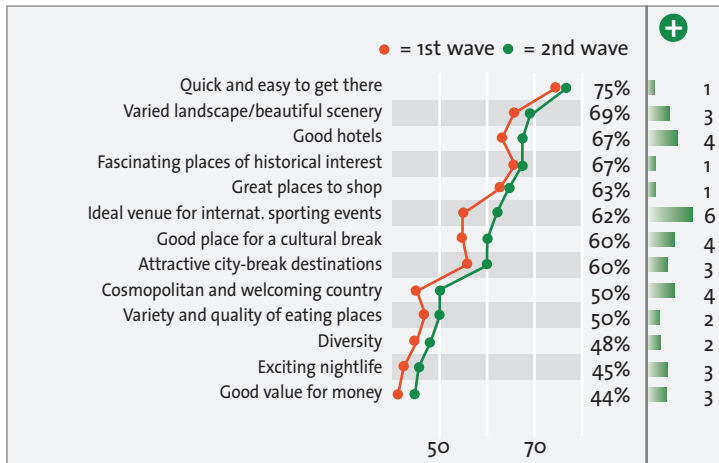
Image of "Destination Germany"

- 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



Germany's image

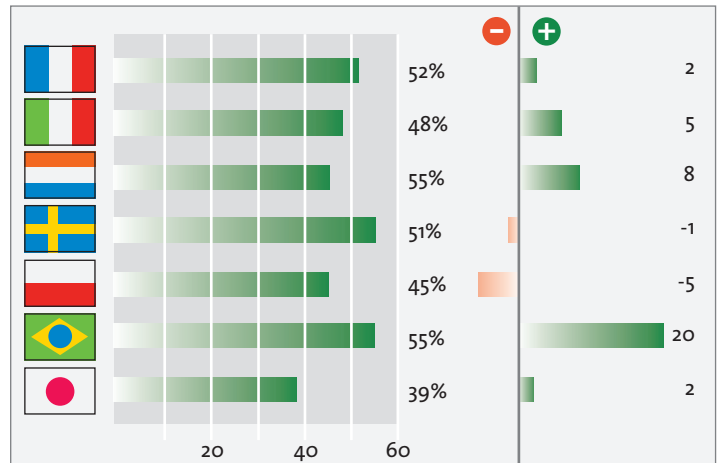


Source: GNTB/TNS Infratest – Image Boost, Nov. 2005, Sep./Oct. 2006

Positive evaluation of Germany as a travel destination

In Europe, people saw Germany's main advantages as: "quick and easy to get to", "diverse landscapes, beautiful scenery and fascinating places of historical interest". Germany is also said to have "good hotels" and "excellent shopping". In addition, 56

Cosmopolitan and welcoming country



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

per cent of all those surveyed said that Germany is an ideal place to hold international sporting events – in Poland it was 80 per cent and Brazil, 70 per cent. Just under half think that Germany is a friendly and cosmopolitan country.

Verdict on the Art and Culture programme

- 50 projects from September 2003 to November 2006
- More than 3.5 million visitors to live events
- 364 premières and events in more than 120 countries
- 22,882 articles in German-language print media with a total print run of 1.1 billion copies
- 3,500 known articles in international media with a print run of 150 million
- 300 million TV and radio contacts worldwide
- at least 4.2 billion contacts worldwide

Source: The final verdict on the Art and Culture programme for the 2006 FIFA World Cup™

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

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.

Source: GNTB, Federal Statistical Office 2006 and others