



KRC RESEARCH

MasterCard Football to Football Research Study

Investigating the economic benefit of the World Cup and role of women's participation in football

– Sports economic experts and Sports sociology experts

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**Research Methodology**

Twelve prominent sports economic experts and six sports sociology experts were interviewed by KRC Research in April 2006 to investigate the benefits of hosting and winning the World Cup and to consider the role of women's participation in football. Participants were interviewed in their native language across Europe, namely in England, Germany, France, Italy, Spain, and Croatia.

Sports economic experts and sports sociologists were given different questionnaires depending on their area of expertise.

Below is the list of sports economic experts and sports sociology experts that participated in the study:

Sports economic experts

Prof. Tom Cannon	Kingston Business School	England
David Smith	Editor, Sports Business	England
Dr. Benny Peiser	Liverpool John Moore University	England /Germany
Dr. Jean-Francois Nys	Senior lecturer of sport economy at University of Limoges	France
Dr. Stefan Steib	Economist, State Bank of Rhineland	Germany
Dr. Markus Kurscheidt	Dept. of Sports Management, Ruhr-University Bochum	Germany
Dr. Volker Treier	Economist, German Chamber for Industry and Commerce	Germany
Dr. Sergio Lugaresi	Chief Economist, Capitalia	Italy
Vanessa Morillas	Footballers Press Agent, All for One Consultants	Spain
Angel Barajas	Author of "Football's economic value. Financial Radiography of Spanish Football", University of Vigo	Spain
Damir Vrbancic	Director, Football club "Dinamo Zagreb"	Croatia
Edo Pezzi	Sports Commentator	Croatia

Sports sociology experts

Dominic Malcolm	British Sociological Association	England
Jessica Macbeth	International Football Institute, University of Central Lancashire	England
Prof. Thomas Reilly	Director of Research Institute for Sport Liverpool John Moore University	England
Prof. Fabien Ohl	Institute of Sports Science and Physical Education (ISSEP), University of Lausanne	France/Switzerland
Fe Robles Fernandez	Projects management and coordination, Commission of Women and Sport	Spain
Prof. Drazen Lalic	Faculty of Political Science, Split	Croatia



Executive Summary: Part One - The Benefits of the World Cup

A. Hosting large sports tournaments

Managed properly sports events can be a catalyst for investment and a potential source of great profit

The economic experts surveyed mention the World Cup and Olympics as sporting events that can benefit the hosts the most. Barcelona is cited as a city that has benefited the most from hosting the Olympics. France is cited as a country that has benefited the most from hosting the World Cup. Economic experts say that hosting a large sporting event can help transform the host city or country, boost tourism and attract investors.

Planning and organization are essential in order for the event to be a success for the host country. There also needs to be consideration of the degree of investment in infrastructure that is required to host the tournament. Marketing is important to help improve the image of the host country and to promote tourism.

B. Hosting the World Cup

The World Cup helps promote the image of the host country

Economic experts say the main benefit of hosting the World Cup is the way it can promote the image of the host country. Another important benefit is the way it can generate revenue for redeveloping poorer areas and help improve the general and sporting infrastructure. It is also seen as a way of uniting the people within the host country and improving the atmosphere.

Germany 2006 could be the most profitable ever

The majority of economic experts say the Germany economy will make a profit or at least break even after hosting the World Cup. Predictions for the amount of profit the economy will make range from €1.5 billion to €25 billion. One expert commented that this World Cup is likely to be the most profitable in history. However, an English expert argued that the economy would lose money as people will be watching the football rather than working. In the long term, the prospect of increased tourism is thought to have the largest impact on the German economy.

While Japan/Korea 2002 is thought to have made a net loss, South Africa may do better in 2010.

Many say Japan and South Korea lost money through hosting the World Cup in 2002. They didn't manage to attract enough visitors to the competition so were not able to recoup the investment they made into infrastructure. However, experts think the South African economy is likely to profit a great deal from hosting the 2010 World Cup. There are likely to be fewer tourists than in Germany but the tournament will be important to South Africa in order for them to attract investment to the country and help build infrastructure. There is a warning from one economic expert that the tournament may come too soon for South Africa, and there is a risk of socio-economic crisis.

Croatian experts expect large economic returns if Croatia hosts Euro 2012

Croatian experts expect that if Croatia jointly hosted the 2012 European Championships with Hungary there would be a large positive impact on the Croatian economy in the long term, with perhaps income doubling or tripling the amount invested. The tourism and hospitality sectors are cited as those which would benefit the most.

C. Benefits enjoyed by previous World Cup winners

Winning the World Cup leads to social rather than economic benefits

According to respondents, the biggest benefits of winning the World Cup for Brazil and France were more social than economic. The win produced a "Feel Good" factor that helped boost social cohesion and perhaps productivity although there is a feeling that even these social benefits can be short lived.

D. Benefits of winning the 2006 World Cup

"Feel Good" factor is expected to lead to at least some economic gains

Most of the economic experts feel that if their country won the World Cup it would have a positive impact on the economy, with this gain being as much as €50 billion. The economy would benefit because of a surge in consumer confidence and through a short boost in productivity. Experts from Croatia and Spain are the most positive about the prospect of their team winning the World Cup saying it would dramatically improve the



economy, increase tourism to their country and for Croatia, help influence their candidacy for Euro 2012. There are a few economic experts who do not expect any impact on the economy if their country won the World Cup.

E. Benefits of winning the 2006 World Cup on specific sectors of the economy

A short term party and a long term boost for the country "brand"

Hospitality, sports clothing, food and drink, leisure, general retail and tourism are mentioned as sectors that would benefit from a World Cup win. One expert says restaurants and bars could benefit by up to \$1.5 billion if England won the World Cup while another says Croatian success could increase restaurants and bars income by up to 60%. Another says sports clothing and retail stores in Italy could increase their income by €20 billion.

All but one economic expert says if their country won the World Cup their country would benefit in the long term from increased brand or country recognition that would lead to more products being bought from their country, and that this benefit could be up to €6 billion. At least half say their country would benefit from increased consumer confidence, at around a €1 billion benefit, and increased tourism at around a €1 billion benefit.

F. Economic cost of an early exit from the 2006 World Cup

There would be no economic gain from an early exit

However, most economic experts say there would be either no benefit to the economy or a net loss if their team was knocked out in the initial group stages, or at the quarter final stage. A German expert says losses could reach €600 million.



Executive Summary: Part Two - Women and Football

A. The increased rate of participation of women in football

More women are watching, playing and supporting football but it varies by country

Almost all sports economic and social experts say there has been an increase in the numbers of women playing, watching and supporting football in the past 10 years. Changes in society and generally and specific changes in the attitude of the football community have driven the increase. One sociologist has seen an improvement in football's infrastructure for women but another says they have not seen a massive increase in the numbers of women who play football - it varies from country to country.

Football is no longer dominated by the male working class

Sports sociology experts say that more women are participating in football because football has become more fashionable with the media and with women's media in particular. It is no longer thought of as a working class, male dominated sport, and is more likely to have the atmosphere of a carnival or theatre. Cultural changes and acceptance in the football community has helped drive the increased participation of women football. Some sociology experts say society's "equal opportunities" mindset of recent years has helped encourage women to take up football. Women are particularly attracted to football as a sport because of its reliance on skill rather than physical strength and because of its accessibility.

B. How the game has benefited from increased participation of women in football

Specific sectors have benefited from more women in football

Economic experts say the increase in women's participation in football has had only a minimal impact on the amount of revenue created by football. However, social experts are able to say that there are specific sectors that have benefited; they have seen increased merchandising, increased attendances at matches, increased advertising and marketing opportunities, and more sales of women's football equipment and clothes due to an increase in the participation of women in football.

Men still vastly outspending women on football but this is slowly changing

Economic and social experts have varying opinions on the amount of spending on football they think is done by women. This percentage is cited at as low as 2% by a one economic expert and as high as 35% by another. Around half of the experts say the figure is somewhere between 5% and 15% of total spending on football. Almost all of the economic and social experts say the participation of women in football will keep increasing over the next 10 years. Most experts think there will continue to be a small to moderate increase. However, two experts say they would hope to see as many women participating as men within the next 10 years.

Female influence on football is small but increasing

Sociology experts say the increased participation of women has so far only had a small effect on the game, such as a small increase in spectators, but the female influence is likely to increase in the future. One expert says it has had a positive influence on the role of women in society, and another says it has improved the atmosphere surrounding football. Girls in particular are being encouraged to take up football because of the increased participation of women in football.

C. The prospect of market saturation in Europe

Revenue reaching saturation point in Europe and only room for limited growth in Africa and Asia

Most of the economic experts agree that revenue from football is reaching its saturation point in Europe. Although one expert states that there is still room for growth in Europe among the female population. Some experts warn that although interest is big in Africa and Asia, income levels are low so there is still only a limited market for spending on football.



Part One - The Benefits of the World Cup

A. Hosting large sports tournaments

The World Cup and Olympics are seen by economic experts as the sporting events that have benefited the hosts the most. Barcelona is cited as the city that has benefited the most from hosting the Olympics. France is cited as the country that has benefited the most from hosting the World Cup. Hosting a large sporting event can help transform the host city or country's image and infrastructure, boost tourism and attract investors.

Q1. Which host country of a major sporting event from the past twenty years would you say has benefited most from hosting the event?

Sports economic experts:

Olympic Games in Barcelona. The area around Barcelona has been historically neglected and subject to economic deprivation. Its profile has now been improved and has transformed economically. It is now one of the most dynamic cities in Europe.
Olympic Games in Atlanta - Public relations with tourism. National Pride and media expansion.
Olympic Games in Sydney. One of the most profitable games in term of tourism.
Mexico in 1986 really benefited from hosting the World Cup because it's a country where football is popular, but I doubt that Japan and Korea benefited from hosting the World Cup.
I think the country that has benefited the most during the past 20 years is France because winning the World Cup gave them a big deal of prestige and that also attracts investors.
I think this country is Korea.
Olympic Games in Barcelona. Barcelona certainly is the city that has invested the most to host the Games. The city of Barcelona used the Olympic Games to develop a social and economic urban policy in a sporting point of view as well as allowing the construction of social housing.
A great example would be the World Cup in France in 1998. If we compare France to Germany you will notice that between 1998 and 2000 France's growth was much higher than Germany's. In 1998 France's GDP was 3.6% and Germany's 2.0%. In 1999 France's GDP was 3.2% and Germany's 2.0% and in 2000 it was 4.1% for France and 3.2% for Germany. In this particular case the income generated through the World Cup has overtaken Olympic events.
Olympic Games in Barcelona 1992, they had the most remarkable success, they have transformed themselves completely and gone from being a not so famous city to becoming a cosmopolitan city.
France in 1998 provided a boost in tourism and therefore also the macro-economic and micro-economic side of the country.
France in 1998. As a host country they made great profits economically, not to mention sporting success, the general image, and the affirmation of their players.
I think Portugal has made huge profits from organising the Euro Cup in 2004. They have contributed a lot to football and grown significantly in the last 20 years. They have been below European standard at that time, so they are the perfect example and the first that came to mind. Of course we mustn't forget about Belgium and Netherlands which also had made a profit from organising a Euro Cup, but they are economically much stronger than Portugal and I didn't expect anything less from them.



Economic experts say planning and organisation are essential in order for a major sporting event to be a success for the host country. There also needs to be consideration of the degree of investment in infrastructure that is required to host the tournament. An event of this kind can provide a real opportunity to improve a city or country's infrastructure, but the expense of doing so can be high and potential hosts must not "bite off more than they can chew". Marketing is important to help improve the image of the host country and to promote tourism.

Q2. *What do you think is the most important lesson to be learnt from this success by the host country?*

Sports economic experts:

(Barcelona) They re-vamped the whole of the area (retailing and restaurants) and used the event as a platform for the future. They accepted that the event doesn't end at the end date and the life of the city carried on afterwards.
(Atlanta) Marketing and sponsorship strategies towards the event. Selling the event to the rest of the world and balancing the cost.
(Sydney) Planning. They were able to plan everything. There was no negative image.
(Mexico) The most important aspect is the fact that there is a big investment in infrastructure to meet the requirements of organising this type of event and also the promotion of tourism. There's also a lot of investment from national institutions in improving the quality of the organisation and management overall.
(France) In my opinion all the aspects related to the organisation and the image they projected are the main achievements of the host country.
(South Korea) A successful event is well planned and organized, with investments that have a real value. It doesn't matter about the sporting event in itself, I also mean considering the overall initiative about this success.
(Barcelona) A long term strategy that didn't limit itself to the organisation of the Games
(France) First of all it has to be a welcoming country; it shouldn't be overshadowed by scandals. Secondly, you need luck and you also need to portray a positive image, which is a bit difficult (for Germany) especially when we consider in which light our Chancellor is seen. As a result consumers will buy more, which will generate more income.
(Barcelona) A town that applies to become a host has to evaluate its own situation. They need to have an infrastructure that doesn't need too much revamping so that they don't need to spend too much money on that. And it is very important that they have a good image in order not to attract too much bad press.
(France) The infrastructure should be brought up to a certain standard.
(France) In my opinion, France has gained mostly from tourism. Some other countries have stepped out of anonymity and improved their general image. Some have gained by building more stadiums and sports infrastructure. One thing is for sure, they all have made a profit from the business perspective, which proves that football is still one of the most profitable businesses to be involved with.
(Portugal) One thing is for sure, all major sport events should be organised with support from the government as much as possible. It is a serious project and it can't only be the effort from just one group of people. We are talking about extremely serious events which have to include some government infrastructures. That's the way that previous countries have been organising events like this, and there are some nice examples to be followed. What we talk about here is a project that has become more and more demanding and it requires absolute focus from all institutions of the country that will have the privilege to organise them.



B. Hosting the World Cup

Economic experts say a major benefit of hosting the World Cup is the way it can promote the image of the host country. Another important benefit is the way it generates revenue for redeveloping poorer areas and improving infrastructure. It is also seen as a way of uniting the people within the host country and improving the atmosphere. Hosting these events can also be good for the economy by attracting tourists and foreign investment.

Q3. Now thinking specifically about countries that host the World Cup, in what ways do you think the host country can benefit from holding this high profile event on the world stage?

Sports economic experts:

It can change the image of the country in the rest of the world. Big financial potential that has not been used.
It is always from a PR perspective a positive event. It allows countries to pour money into poorer areas, to make local investments. The World Cup infrastructure is not as expensive as the Olympic Games.
Increase the profile of the country beyond the event.
A country that is hosting the World Cup will have an opportunity to promote the image of the country. In Spain for example, there was an investment in tourism but in Germany the approach is different. The emphasis is not on tourism but on promoting the country as a place to do business.
In many different ways because this sort of event is a big showcase and can generate a lot of revenue, especially in the media (broadcasting rights) and in tourism.
The most important benefit is to attract a huge amount of sporting tourists worldwide and all over the country, as holding a high profile event means promoting the event in all countries.
Benefits mainly in terms of the country's image and so the possibility to attract more tourists.
It could improve the image of the country to the eyes of the rest of the world. Good organisation goes way beyond the impact of the event itself, it goes from how well the different teams are accommodated, down to how well the infrastructure has been prepared to actually host the event. If all this is well done it will not only enhance the country's image but it will also bring a general good atmosphere forward.
The three most important benefits would be : Q1. The development of the economy e.g. more jobs and more money Q2. A boost for the image of the country, more advertisement. A boost brought by the fact that a mega-event is taking place in that particular country. Football and athletics have always attracted a lot of attention from the public. Q3. A socio-political factor, sport encourages social integration. It unites people from different ethnic and economical backgrounds. It also brings a feeling of euphoria. But it also has its drawbacks and dangers, for example terrorism or hooliganism as well as bringing in a financial burden. There is also a very high risk of tarnishing the image of the city if things go wrong.
It can have a positive impact on a macro and micro-economic level. On a psychological level it can boost the atmosphere in the country.
There are a number of benefits, first of all to the national economy. A lot depends on the organisation of course. On the sports education, involvement and motivation of youth. On building new sports infrastructures and stadiums. In the past for example, former Yugoslavia and other eastern European countries have benefited mostly from getting new sport facilities.
Projects like this involve hundreds of thousands of people who will anticipate directly in one way or the other, and even after 20 or 30 days after the event is finished it leaves an impressive infrastructural network. Apart from secondary profits from selling souvenirs, marketing and TV rights, there are direct effects on the sport itself. The first of which is the popularisation of the sport that you are hosting the event for, and second is new sport facilities like stadiums and arenas. It also motivates young people to turn to sport. And of course we mustn't forget to mention the political significance of organising events like this which automatically improve the image of that country.



Many of the economic experts say Japan and South Korea lost money through hosting the World Cup in 2002 because they didn't attract enough visitors to recoup the infrastructure investment. Croatian economic experts are more optimistic saying that the economy and particularly football in Japan and South Korea benefited from hosting the World Cup.

Q4. How much do you think South Korea and Japan benefited economically from hosting the World Cup in 2002? If you had to estimate the financial benefit, how much would you say it was worth to each country?

South Korea - Sports economic experts:

A loss of \$1 billion. It didn't attract many visitors. The money they made didn't match the investments.
They lost tens of millions of dollars. Revenue from broadcast and merchandise did not cover the cost of running the event and building the infrastructure.
Benefited on their profile from hosting a successful event. But the time difference did not help and joint hosting the event never seems to work as well.
The economy grew by 7%, it spread itself out more for them than was the case in Japan.
They lost \$1 billion. Just like Japan they had 8 stadiums built especially for the World Cup but they weren't put to use after the World Cup, and on top of that they didn't really attract many visitors.
I don't think they made any profits in South Korea; they invested too much money into the event and didn't get much return or viewers for that matter.
I spent only a few days in South Korea when they were hosting the World Cup, so I can't say much but what I witnessed over there was amazing. Hotels and catering business just flourished and so did tourism. They built up new stadiums with shops and small businesses. They benefited from tourism, hospitality and catering, and transport.
Above all football as a sport has benefited the most in Japan and South Korea. These are relatively new markets and football is not as popular in these countries as it is in Europe but it's constantly growing, especially and directly because of World Cup which they hosted in 2002. South Korea has developed a lot in last 15 years and has now become a respectable football team. I had the privilege to be there during the Cup, what I saw was incredible. The stadia and the whole organisation was of the highest level. What I have seen is that the complete South Korean infrastructure has been revitalised, like: Transport, roads and parks, even whole new camps that became small cities. I was absolutely fascinated.

Japan - Sports economic experts:

Japan broke even because of better tourist management.
I think it's probably even lower as I was in Japan at the time and some people didn't even know that the Football World Cup was going on.
Japan had other worries, they had already been stuck in a 10 year bank crisis. Their tourist management was a little bit better than South Korea so they had a few more visitors but it still wasn't worthwhile.
Japan built ten new stadiums especially for the World Cup which then created an economical burden because the stadiums weren't really put to use after the World Cup. However, they will still have to pay maintenance fees on these stadiums for the next ten to twenty years.
It was a purely a loss rather than a gain. And it will take Japan years to level all their expenses out.
Japan benefited even more, because of their stronger economy, higher prices (tickets, food and drink, accommodation etc).
Japan is a highly sophisticated and hard working country and in that spirit they organised the event. Financial profit was made without a doubt, but what Japan has benefited from the most was the popularisation of football in that area and in the whole continent. We are witnessing that the Japanese Football league is now home to a number of European and Brazilian football players. This is proof that Japan is now the leading country in that part of the world when it comes to the football industry.



Economic experts do not agree on whether the World Cup will have a large impact on the German economy. Some say there will be a large impact of €3 billion plus, while others say the impact will be smaller and short term. Increased tourism is thought to have the largest impact on the German economy. Improvement in infrastructure and increased consumer confidence are also cited as contributing factors.

Q5. Now thinking about the upcoming World Cup in Germany, what do you think the financial impact will be for the German economy – how much additional revenue do you think it could bring for them? Why do you say that?

Sports economic experts [excluding Croatian respondents]:

A 0.1 to 0.2 increase in GDP. In the short term: \$3 or 4 billion. Tourism: enhance their image as a European Destination.
Very little, tens of millions of Euros. Due to a very short boost in tourism. Nothing significant.
I think tourism will benefit and as I said the infrastructure and facilities in some areas of the country. However, I doubt there will be an immediate effect but if there's good planning when investing the money it can be possible to make a profit from these investments. Germany for example is investing a lot of money in refurbishing and remodeling its stadiums, such as Schalke 04, and making them multipurpose venues so they will be able to host other events and that will benefit the economy.
I think foreign visitors will generate revenue in the catering and hotel trade, although I wouldn't be able to give you a figure.
A 0.1 increase in GDP. In the short term: €300 billion. In 2006 there will be an increasing number of tourists and also a considerable growth in confidence if Germany should win the World Cup. From this point of view, it will not be a big impact for the German economy. This is just a small contribution to the revenue.
I think that the economic impact of sporting events is weak as they only last for a few weeks.
An increase of about €7.5 billion. The expenses of the State, FIFA and several other sponsors towards advertising agencies as well as construction companies contracted to build up the infrastructure and build up the image of the country will benefit from it. Therefore more jobs would be created and more money will be spent.
An investment of €1.5 billion might be expected, to build stadiums which will in turn boost the economy. Consumer expenses: Tourists bring in fresh money. But then again there might be a risk that taxes may rise as a direct result of the crowding out effect.
A lot of money will be invested into revamping the infrastructure. But it won't change much to the economical situation. As for revenue generated by consumers, most of it will have been generated even before the World Cup starts.



The majority of economic experts say the Germany economy will make a profit or at least break even after hosting the World Cup. Predictions for the amount of profit the economy will make range from €1.5 billion to €25 billion. One economic expert commented that this World Cup is likely to be the most profitable in history, while another argued that the economy would lose money as people will be watching the football rather than working.

Q6. Now taking into account the expense of hosting the World Cup. What do you think will be the net profit or loss to the German economy?

Sports economic experts [excluding Croatian respondents]:

Break even in the short term. In the medium term: tens of billions of dollars (10, 20 maybe 30 billion)
Minus a few tens of millions. Male population watch the football instead of working
The expense of hosting will be an exclusive advantage for the country. This is not a real expense, this is just a positive contribution for the German economy.
I think that major sporting events are neutral in the way that the cost and the revenue generated balance out. If it goes well there is a slight profit but it remains very low.
Revenue of about €7.5 billion, of which 0.33% will be directly through the World Cup.
A 60% probability that income will be around €1.5 billion and a 6% probability of profit loss. From 2003 to 2010 I reckon there will be a total profit of €8 billion which represents 0.05% of the GDP I think there will be a 0.1% of GDP profit during the year of the World Cup and subsequently 0.05% of GDP in the years following the World Cup. Besides Germany doesn't really need to invest too much into the infrastructure because out of the twelve stadiums in which the games are to take place only three need to be refurbished, which again means that there would be a minimal loss of profits.

Q6a. How much would Germany benefit economically from hosting the upcoming World Cup in 2006?

Sports economic experts [Croatian respondents only]:

I think the World Cup in Germany will be so far the most profitable World Cup in history, with huge profits. Germany has got the knowledge, experience and I'm sure that they will make some profit from it. Judging by the ticket sales and interest, it suggests that there will be enormous benefits.
Germany is traditionally a country which knows how to prepare and organise sports events like this. Financially and economically they are one of the world leading countries, which is enough to convince me that they will try to make profits out of it. Also we all know that Germany has always been a world super force when it comes to football and love for this sport. It's popularity in that country has never been a question, considering all that I'm sure that we can expect one of the best World Cups if not the best in history. Personally I'm really looking forward to it. When it comes to figures again I won't be able to give you exact number, but if we know that one Champions League is worth €800 million, we can only imagine what figures this World Cup will have.



Most of the economic experts say the South African economy is likely to profit a great deal from hosting the 2010 World Cup. There are likely to be fewer tourists than in Germany but the tournament will be important to South Africa in order for them to attract investment to the country and help build infrastructure. There is a warning from one economic expert that the tournament may come too soon for South Africa, risking a potential socio-economic crisis.

Q7. How much do you think South Africa may benefit economically in hosting the World Cup in 2010?

Sports economic experts:

Plus or minus \$500 million. A short term increase in visitors will be balanced with investments in infra-structure.
Plus \$10 to 20 million. South Africa is a fairly new country with political difficulties. It can help to attract foreign investment and promote their country.
I think South Africa could benefit quite a lot from the World Cup because of different aspects and peculiarities of the country. It could be a good destination for the clubs pre-stage training periods. South Africa is a country with a good level of development and proximity to the European culture - that could be an asset when attracting investment. I also think tourism will benefit.
I think South Africa will have a higher chance to benefit economically because they are a small country. The impact will be two or three times greater than for Germany. In comparison with Germany, there will be a lower number of tourists but the prices of investment will be cheaper, for example the transport.
As the South African economy is less developed and less integrated the impact will be bigger than it was in Japan. But it depends on the investment that is necessary in the construction of new stadiums and how they will be financed.
The South African economy is not as strong as the German economy, so it is much more important for South Africa to be a host for the World Cup, it would boost the general atmosphere as well as their economy.
I think it is a bit too early for South Africa to become a host, the required investments are way too high. A lot of the country isn't properly prepared on an economical and infrastructural level. It might very well end up in a socio-economic crisis. From a positive point of view, advertisements will stimulate tourism. It will be the first time that a mega-event is taking part in Africa which will once again bring forth the special role South Africa is playing on the African continent. Besides it will send the message that Apartheid has been overcome.
They will be able to completely rebuild their infrastructure.



Croatian economic experts expect that if Croatia jointly hosted the European Championships with Hungary, there would be a large positive impact on the Croatian economy in the long term, with perhaps income doubling or tripling the amount invested. Tourism and hospitality sectors are cited as those which would benefit the most.

Q7a. Now thinking about the European Cup in 2012. If Croatia and Hungary were to co-host the European Cup in 2012, what do you think the financial impact will be for the Croatian economy – how much additional revenue do you think it could bring for them? Why do you say that?

Sports economic experts [Croatian respondents only]:

<p>Not as much as Germany probably, but definitely far more than other eastern European countries would. Firstly because of the growing popularity of Croatia as a tourist destination. Secondly because of the position of our country in term of transport, communication, food and hospitality. Mostly tourism and the revitalisation of the hospitality sector will benefit.</p>
<p>It would be huge, without a doubt. It is a fact that all countries that have hosted European or World Cups have benefited from it in the short and long term. It will improve the economy and national income for a short period of time for those countries. It would be a really strong financial injection. Direct benefits first of all are coming from marketing and TV rights, which are reaching astronomic figures. Croatia is a small country with a population of 4-5 million people. Sport events like this will be a huge step forward for us. Let me remind you that Croatia has hosted the Mediterranean Games, which is of course really a small project in comparing with the European Cup. But even so we have benefited and gained some profit from it. It's really hard for me to give you exact figure. First of all, if we get to be a host for the European Cup 2012, we will share it with Hungary. But nevertheless I am sure that Croatia is ready to deal with a project like this and of course with the help of our own institution and foreign ones like FIFA and UEFA. The economy overall will benefit. Tourism absolutely, plus construction companies and hotels.</p>

Q7b. Now taking into account the expense of hosting the European Cup. What do you think will be the net profit or loss to the Croatian economy, in the short and the long term?

Sports economic experts [Croatian respondents only]:

<p>I can't give you an exact figure. In the short term I think you can't really expect large benefits, but in the long term absolutely.</p>
<p>I'm sure it will return double or triple the amount invested.</p>



C. Benefits enjoyed by previous World Cup winners

Economic experts say the biggest benefits of winning the World Cup for Brazil and France were more social than economic. The win produced a “Feel Good” factor that helped boost social cohesion and perhaps productivity but there is a feeling that even these social benefits can be short lived. For Brazil, the biggest effect of the World Cup win may have been to increase the value of Brazilian footballers that go and play abroad.

Q8. Thinking about recent World Cup winners, Brazil in 2002 and France in 1998, what do you think was the biggest economic or social benefit each country gained from winning the World Cup?

Brazil - Sports economic experts:

A massive surge in self-esteem boosted productivity.
It can help to promote social cohesion and forget your social problems for a short time.
It was a huge impact that they won it again. It affected the whole country – “Feel Good” factor.
In Brazil this is not new...I don't see any economic benefit for the country. On the contrary, after Brazil won the World Cup most of the national team players were signed by European clubs. So the money is earned outside Brazil and is spent overseas.
Both France and Brazil benefited economically after winning the World Cup in various ways. Most of the players of both national teams have improved their contracts or have been signed by a foreign squad in the best football leagues. Also the image rights of those players have generated revenues and attracted sponsors.
We can find benefits in both countries. We generally notice that there is an increase in consuming goods after the event has taken place.
I don't really know what the impact of a victory was for the Brazilians. It increased the value of their athletes, which gives them the opportunity to leave for other countries. So it is an exodus of their football and a way to export a product (the Brazilian footballer).
It was really important for Brazil, it provided an outlet for the population's frustration since it is a really poor country and football is their pride, it was really uplifting for the country.
There was a lot expected from Brazil, so when they won it was only a confirmation of what people already knew.
It was more of a psychological benefit than economic. It was a massive boost for people's pride and an outlet for their frustrations.
The Brazilian football team has reached the point where they are playing friendly games for no less than \$1 million. Of course the biggest profits are made by the players themselves, and the Brazilian Football Federation is still self financing. One thing for sure is the benefits are more social than economic.
We are talking about the world's two biggest football teams at the moment. Of course there are huge differences between these two teams as well as in these two countries, that's why economically and socially there will be differences as well.

France - Sports economic experts:

It improved the view on French football. Recognition of French expertise in football.
A short lived enhancement of a successful multicultural society. Good for national ego
The first time they won, “Feel Good” factor. Increased awareness of and improved race relations.
I don't think there was any impact in the French economy when France won the World Cup.
For France the benefit was social but a short lasting one. There was a social euphoria but the bad results in Japan cancelled out the 1998 victory. So it's a social euphoria, the feeling to be part of the best performing countries. A pride that lasts a few months or a few years but it is quickly challenged if a victory doesn't follow four years later.
It wouldn't be that important for France on an economic level because it is a pretty developed country.
For France it was the fact that they won in their own country, it just had the vibe going.



Most of the economic experts say winning the World Cup generally had at most a small effect on the French and Brazilian economies. Although one expert puts the figure at up to \$5 billion for Brazil and up to \$30 billion for France. Any benefit to the economy would have been in terms of consumer confidence or productivity although this would have been short lived.

Q9. To the best of your knowledge, what influence did winning the World Cup have on the Brazilian or French economy?

Brazil - Sports economic experts:

Plus \$3billion to \$5 billion. Boost in tourism and productivity. "Feel Good" factor.
It had no effect.
Temporary effect: increased consumer spending.
I think that the economic impact is very low, for Brazil as well as France. It only represents 0.1% of GDP at the most.
They were expecting too much in Brazil to be really thrilled when Brazil won so it didn't really have so much of an impact on the Brazilian economy. Brazilian's are known to celebrate all the time and it didn't make a big difference.
It can't really be measured.
Brazil as a country didn't make much profit economically, but the football industry definitely did.
Brazil has a lower level of organization than France because of obvious economical reasons, and I think that Brazil as a country hasn't benefited financially as much they did socially. Every child or adult is supporting their national team and has no doubt that they will win the World Cup as they prove so many times before. So socially Brazil is gaining much, but financially not that much.

France - Sports economic experts:

Short term: Plus \$10 billion. Medium term: plus \$20 billion to \$30 billion. Boost in productivity and "Feel Good" factor
It had no effect.
Same as for Brazil.
Same as Brazil, 0.1% of the GDP.
The consumption level is still on a very high level. In the second quarter the growth was around 1.5%, and it stayed on that level because the overall atmosphere was good.
Boost in consumption thanks to the general euphoria which of course generated a "Feel Good" factor.
It can't really be measured.
France is a more sophisticated country than Brazil with far more economical power and developed businesses. I'm sure they took all the advantages from hosting and winning the World Cup.
Individually France has benefited both financially as well as socially, mostly because France is in the situation to provide excellent conditions for future players who can have a first class environment.



Economic Experts from Germany say their win in 1990 helped bring the country together after the fall of the Berlin Wall but did not have an effect on the economy of the country. Experts from Italy and the UK felt their wins in 1982 and 1966 respectively had a very positive effect on their economies.

Q10. Thinking about the last time your country won the World Cup, what effect did this have on the economy in your country?

Sports economic experts [respondents in England, Germany and Italy]:

Big boost to the economy which lasted for a long time. Short term: just short of 1 billion dollars. Over 5 years: \$2 billion (current currency).
None – But it had an influence on bringing Germany together at a tough political time.
No significant effect as the World Cup was not such a big commercial event as it is now. Mainly “Feel Good” factor.
It has been very positive. In the following months to the event there was an increase in goods consumption.
It was a year of euphoria but not because we won the World Cup, it was more due to the fall of the Berlin Wall. On an economical level the fall of the Berlin Wall had a much greater impact. It faded out the joy of winning the World Cup, Germans were busier with getting readjusted with the fact of being united again.
It didn't have a really big impact because it was overshadowed by much more important things like the fall of the Berlin Wall. And the fact that we won the World Cup that year only showed that we were on a national high at this time.

Croatian Experts say their third place in 1998 was equivalent to them winning the World Cup for their country. The success helped improve the image of Croatia and increase the amount of investments into Croatian sport

Q10a. Croatia has never won the World Cup. Nevertheless, when you think about the last time Croatia had a good result and reach the semi-final, what influence did it have on the Croatian economy?

Sports economic experts [Croatian respondents only]:

Winning the third place for us was equal to winning the Cup, beyond any of our expectations. Of course after that every major company wanted to advertise themselves and become a sponsor of the team. We also improved the general image of the country which had an immediately impact on our tourist season.
Apart from direct profit to the Croatian Football Federation, there were other benefits such as improving the general image of the country. There was a great national satisfaction and happiness and I'm quite sure that it also influenced the national economy for a bit, through the increasing number of investments into football as well as sport in general.



D. Benefits of winning the 2006 World Cup

Most of the economic experts feel that if their country won the World Cup it would have a positive impact on the economy. The economy would benefit because of a surge in consumer confidence, the “Feel Good” factor could also boost productivity for a short while. Croatian experts are the most positive about the prospect of their team winning the World Cup saying it would dramatically improve the economy, increase tourism to their country and help influence their candidanship for Euro 2012. There are a few economic experts who do not expect any impact on the economy if their country won the World Cup.

Q11. If your country were to go all the way and win the 2006 World Cup in what ways would your country benefit economically during and shortly after the tournament?

Sports economic experts:

There would be a short term surge in productivity with people spending more money in general (even on such things as electricity). Global perception in terms of investment from foreign businesses. The country would pitch for more events such as the Olympics.
I doubt it would have any influence. Some sectors (Hospitality/Food) might benefit for a short period of time.
More consumer spending and “Feel Good” factor. More money spent on football merchandise.
I don't think there would be any economic benefit for the country.
It would be a big surprise because we've never get close to winning. I think it would have a clear effect on the economy because there would be a lot of events and receptions. Investors will look into ways to secure sponsorship deals. The “Feel Good” effect could help to improve productivity.
In the course of the tournament I do not think that the impact would be positive at all. Shortly after, there might be an increase in goods consumption caused by the euphoria of having won.
A boost in confidence may be able to reduce social tension. To that effect there would be an indirect impact on the economy. As for the victory itself I don't see what economical effects it could generate.
Increased export of goods, a boost in private consumption, and a boost in the employment market because more jobs will generate more purchases - by that I mean more people wanting to spend their money.
It would be similar to what happened in France. It would have a positive impact on the general atmosphere, as well as a positive impact on consumption because people will spend much more on goods before taxes rise. They all know that there will be inflation in the year following the World Cup, so they will invest in things like cars, fridges and other electrical goods because they know that it will be cheaper than buying these goods the following year.
It will have a positive impact on the general atmosphere, which in turn will boost the economy thanks to growth in consumption.
Above all tourism will benefit the most, because people will talk more about Croatia. It's unbelievable what the success of a country like ours can do to improve its economy, just by winning or achieving good results at any major sports competition. Not to mention hosting one.
At the moment winning a World Cup for Croatia would be a direct gift from God. Of course it will influence our candidanship for the European Cup for 2012. It will have a financial and economic impact that will put us on another level of international credibility. It will be a complete turn over for our economy.



Some of the economic experts say the economy of the country that wins the World Cup could benefit by anything up to the €50 billion. Others say the effect will be minimal, at perhaps 0.01% of GDP, or that there would be no effect at all.

Q12. If you had to estimate a total value for these benefits, what would it be?

Sports economic experts:

\$30-50 billion.
Balanced with the cost there wouldn't be any.
€50 billion euros.
It would be very low. At the most a 0.01% increase to the GDP. That's because I have a very specific concept of what constitutes financial returns.
Between €1 billion and €2 billion.
An increase of 1 or 2% in private consumption.
It's really difficult to give exact figures, but one thing is for sure they will be significant.
Again I really wouldn't like to guess, they would be enormous that's for certain.

Most economic experts say the "Feel Good" factor would be the biggest benefit of winning the World Cup. This added confidence could transfer itself to the working world and in consumer confidence.

Q13. Which do you think would be the biggest benefit of winning the World Cup?

Sports economic experts:

Short term: "Feel Good" factor. Long term: investment in the infrastructure, not just in football but in general for wider range of sports.
Sports clothing and merchandise around the England team.
I can't see any benefit for the economy because there's not a direct relationship. In the football economy there will be an effect because players will have increased their value and the clubs will have to negotiate better contracts for the players. So in a way, winning the World Cup could have a negative effect on the clubs economies.
The "Feel Good" factor and also an increase in goods consumption.
I think that it would bring a surge in the French population's confidence. Confidence is considered as an important element in economic growth.
A change in the atmosphere that would transfer itself into the working world.
A total transformation in the atmosphere. As you know Germans are known for being very pessimistic and sceptical people so the euphoria after the victory would be very welcome.
On a psychological level "Feel Good" factor.
Apart from economy and tourism, there is the general satisfaction that people will feel after winning a World Cup.
Like we said it would be the general enthusiasm and satisfaction of the whole nation, and apart from that it is the sport that will benefit the most.



Most economic experts say there will be a large impact of their country's economy if they won the World Cup. A UK expert says this could be up to \$50 billion, while a Croatian expert says revenue from tourism and infrastructure could double. However, one UK expert says the economy would actually lose money.

Q14. So, overall, if your country was to win the World Cup, can you put a value on the total financial impact it would have on the economy of your country in total, so including the effects during and shortly after the tournament and in the years to come?

Sports economic experts:

\$30 billion to \$50 billion.
Overall, a loss of €100 million.
I believe the impact on the GDP would be minimal.
It would be a maximum of 0.1% in GDP.
During the first, second and third year I expect a growth of 0.1% for each year.
2 - 3% of GDP.
I can't give you exact figure, but it would be around one billion Kuna more for that year.
I can put it in percentages roughly: Tourism 100%; Infrastructure 100%; Hoteliers 50 %; Small services 20%.



E. Benefits of winning the 2006 World Cup on specific sectors of the economy

A range of sectors are mentioned by economic experts as possibly benefiting if their country won the World Cup. Hospitality, sports clothing, food and drink, leisure, general retail and tourism are mentioned as sectors that would benefit.

Q15. Now thinking about specific sectors of the economy such as food, hospitality, sports clothing and any others you can think of. If your country went on to win the World Cup which sectors do you think would benefit? [unprompted]

Sports economic experts:

Short term: hospitality. Medium term: retail and sports clothing. Medium to long term: Communication (image of the country worldwide), more investment in football. Long term: construction and design industry, football and business expertise
Hospitality, slight increase in tourism, food and drinks.
Sports clothing and retail. Leisure activities.
Perhaps there would be an effect in some of these areas but football is global. Spain's kit is by Adidas and obviously if Spain wins Adidas will benefit of an increase on sales but I don't see the country benefiting from this.
The tourism industry will clearly benefit because of the thousands of visitors but other industries such as sports clothing would see a boost on their sales.
Sports clothing, hospitality, food and beverage sectors.
It would certainly be sports clothing manufacturers who would rapidly sell the French team shirts with two gold stars. So the sports clothing sector would be the first beneficiary. Maybe there would be sales of champagne and beverages immediately following the victory. There could be a small peak recorded with everything associated with partying but that wouldn't last.
Retail trade and hospitality, especially tourism would benefit. The food industry, everything that is part of private consumption, and last but not least, advertising agencies.
Well first of all the food and drink sector, because people will want to celebrate the victory and buy much more food and alcohol. Then sports clothing will benefit from those who didn't buy any sports clothing during the event. The retail trade will benefit from it too, thanks to the "Feel Good" factor that comes with a victory.
Sports clothing and private consumption.
Tourism above all, which will mean the extension of the tourist season by 3 to 6 months. This will include increasing sales of domestic products and sports equipment, the extension and building of new stadiums.
First of all sport then tourism, all hospitality and catering services. The other sectors wouldn't really benefit that much.



All economic experts say that restaurants and bars will benefit during and shortly after the tournament. Almost all say recreation and sports clothing sectors will benefit. Most say hotels, travel and other retail stores will benefit if their country wins the World Cup.

Q16. Again, thinking about if your country won the World Cup, please tell me whether you think each of the following sectors in your country would benefit during and shortly after the tournament?

Sports economic experts:

Score (out of 12)	HOTELS	SPORTS CLOTHING & EQUIPMENT RETAIL STORES	OTHER RETAIL STORES	RESTAURANTS AND BARS	RECREATION [I.E. SPORTS AND LEISURE CLUBS AND ACTIVITIES]	TRAVEL [I.E. AIRLINES/ TRAINS/FUEL]
Yes	8	11	8	12	11	8
No	4	1	4	0	1	4

An economic expert from the UK says restaurants and bars could benefit by up to \$1.5 billion if England won the World Cup. A Croatian expert says Croatian success could increase restaurants and bars income by up to 60%.

Q16a. And if so, what would be your estimate for the value of that benefit?

Sports economic experts:

HOTELS	SPORTS CLOTHING & EQUIPMENT RETAIL STORES	OTHER RETAIL STORES	RESTAURANTS AND BARS	RECREATION [I.E. SPORTS AND LEISURE CLUBS AND ACTIVITIES]	TRAVEL [I.E. AIRLINES/ TRAINS/FUEL]
\$250 Million	Up to \$1 Billion	€10 million	Up to \$1.5 Billion	\$500 Million	\$250 Million
€10 million	€20-30 million	Slight benefit	€50 million	About €2 million	€20 million
+ 5%	Up to €20 billion	€5 billion	€5-10 million	+3%	Slight benefit
30% increase	About €10 million	+1-2%	+3%	+2%	+ 0-1%
	+7%	marginal increase	+2-3%	marginal increase	+1%
	+5-10%	+20%	marginal increase	+10%	+20%
	+20%		+60%		



All but one economic expert says if their country won the World Cup their country would benefit from increased brand or country recognition that would lead to more products being bought from their country. At least half say their country would benefit from increased consumer confidence, increased tourism and increased foreign investment. A few say that their country will benefit by businesses relocating to their country.

Q17. Again, thinking about if your country won the World Cup, please tell me if you think your country would benefit from each of the following?

Sports economic experts:

Score (out of 12)	Increased consumer confidence	Increased tourism	Increased brand/country recognition leading to more products from your country being bought overseas	Increased foreign investment	Businesses relocating to your country
Yes	9	7	11	7	5
No	3	5	1	5	7

Economic experts say increased brand or country recognition could benefit their economy by up to 6 billion euros per year. Several economic experts also say that increased tourism, increased consumer confidence or increased consumer confidence could benefit their economy by more than 1 billion euros. An economic expert from Spain is the most optimistic about the effect the World Cup win could have on their economy.

Q17a. And if so, what would be your estimate for the value of that benefit in the years to come?

Sports economic experts:

Increased consumer confidence	Increased tourism	Increased brand/country recognition leading to more products from your country being bought overseas	Increased foreign investment	Businesses relocating to your country
\$2-4 billion	\$2 billion	\$3-5 billion	Up to \$1 billion	\$500 million
€2 billion per year	€6 billion per year	€6 billion per year	€9 billion per year	+3 %
+5-10% in the year of the victory	0.2%	€10-20 million	+0.1%	\$500 million
\$2-4 billion	increase of 10%	+1%	Up to 5% increase	
	\$2 billion	+3 %	Up to \$1 billion dollars	
	+60%	\$3-5 billion		



F. Economic cost of an early exit from the 2006 World Cup

Most economic experts say there would be either no benefit to the economy or a negative benefit if their team was knocked out in the initial group stages, or at the quarter final stage. There would be a negative impact on the media and a German expert says the losses could reach €600 million.

Q18. How about if your country was knocked out in the initial group stages. Would there be any economic benefit to your country from briefly participating in the World Cup? If so, please estimate the value?

Sports economic experts:

No.
No.
A brief benefit for restaurants and bars.
Again, I don't think it would have an impact on the economy. But there will be a negative impact on the media who will lose money on TV rights, advertising and paid sponsorship.
The preparations for sports events such as these are very important to the countries that participate. Lots of bars, restaurants etc invest money to improve their facilities to attract people. If the national team is knocked out in the first stages businesses will see the expected revenues to fall.
No.
No.
No, on the contrary it will dampen the whole festive mood. Besides it would mean a loss of €600 million.
The expenses of people coming from abroad. The more international teams which are still part of the tournament, the more tourists that are going to come and spend money. But it would only be a short term benefit, because it dampens the mood if the hosting country loses.
No.
No.
No.

Q19. And what if your country was knocked out at the quarter final stage, would there be any benefit to the economy? If so, please estimate the value?

Sports economic experts:

No. Because they are expected to reach that stage
No.
No.
There won't be a macroeconomic effect on the country but those companies linked to the event will have decreased sales related to the event.
Yes, because the further you reach in the competition the better for any related sales or revenue.
The impact wouldn't be positive.
No.
No. The positive atmosphere wouldn't be brought forward.
No. They are expected to at least go past that stage because they are the hosting country.
More psychological, it will get people's spirit up.
No.
Every significant success will have impact on general image. Probably economical as well but probably not as much.



Part Two - Women and Football

A. The increased rate of participation of women in football

Almost all sports economic and social experts say there has been an increase both in the numbers of women playing, watching and supporting football in the past 10 years, although the participation of women in football is still a long way behind the participation of men.

Q20. How have you seen women’s participation in football change in the past 10 years? Both in terms of women playing, watching and supporting football?

Sports economic experts:

Increased interest from women in playing, watching and supporting football.
Continued growth in term of playing, watching and supporting football.
It’s gone up in all respects.
The only thing that has really changed is the involvement of women in supporting teams and going to the stadiums. There has also been an effort to promote female football (TV slots, media) but overall the real involvement at all levels is still very small. There are more and more female sports journalists and women accessing management positions within football clubs and other institutions linked to football.
Yes, little by little we are getting rid of the idea that considers football a male sport, and more and more women are getting involved. It’s a combination of things that have changed such as the family and the social environment.
Increased interest from women in playing, watching and supporting football.
There might have been an increase in female football players but in France it remains quite low. Football remains a masculine sport despite the efforts of the French Football Federation. In terms of female spectators there has certainly been an increase since France won the World Cup. The increased number of spectators has to come with an improvement in the comfort in stadiums in high level football.
Increased interest from women in playing, watching and supporting football.
It has significantly increased on all three levels compared to what it was like 30 or 40 years ago.
Increased interest from women in playing, watching and supporting football.
They definitely support football because in Croatia it’s part of almost every family life.
It is a growing process and I’m happy to see that women are starting to get involved, the number of women playing, watching and refereeing has definitely increased significantly in last 10 years.

Sports sociology experts:

More women are playing. A few more are watching.
I think certainly in the UK there’s been an increase in females participating in football. It’s no longer seen as a tomboy sport. That applies in probably all levels of the game. Also, there’s been a greater acceptance of females at the Premier League matches. So it’s become almost acceptable that females would talk about football, the outcome of the game, and discuss it in the same way than males used to in the past. They are able to discuss it quite a well informed way amongst their male colleagues.
There has been a definite increase in women’s participation worldwide. But in my experience in the UK there has been a massive increase in participation. Not just at the women’s level but at the girl’s level which has now started to come through on the playing level. In term of spectators, based in the UK there has been more exposure, a lot more media coverage and it’s becoming a lot more favorable. Women’s football is taken more seriously as opposed to being treated as something of a novelty and trivialised a little.
I think that it has changed favourably. The data we have indicates an increased interest among women. Now it depends on the countries, on the local situation and also on the [football] results.
Yes, there has been a very big and important change. Traditionally football has been seen as a male sport, but now we’re seeing that the number of female players, although still difficult to establish, has increased massively. Also there has been a considerable growth amongst women that are interested in this game and that consume specialised media.
It has become more significant in the last 10 years; of course it still varies from country to country. I think the percentage has increased more in terms of women watching rather than actively participating.



Sociology experts say that more women are participating in football because football has become more fashionable with the media and with women’s media in particular. It is no longer thought of as a working class, male dominated sport, and is more likely to have the atmosphere of a carnival or theatre. Cultural changes, highly publicised relationships between footballers and celebrities in the media, and acceptance of women in the football community have helped drive the increased participation of women football.

Q21. In terms of the numbers of women watching and supporting football. What do you think has driven the increased participation of women in football in recent years?

Sports sociology experts:

General opening of activities which were previously male dominated. This opening was made through the activities of feminists.
I think football has become a more fashionable sport. Its media image has changed. Certainly in the UK it has changed from being predominantly a working class sport with a hooligan trend to becoming almost semi-theatre.
Some of the changes to football stadiums, making them more family orientated have meant women now tend to go along; there are a lot of cultural changes. Women may have been interested in football in the past but didn't necessarily feel comfortable in going to the matches. It has been accepted in the football culture.
I think it's due to a change in the media. Not in terms of team results but in terms of personalities and their private life as well as family life. The feminine press also started to show men and women from sports. In football, it is more the men, heroes like Beckham and others that are in relationships with celebrities.
The fact that football is the king of sports and that women are more and more attracted by sports, and are playing more sports will have an effect on football. Football is a very accessible sport which you can play virtually anywhere, in the school playground before women would watch and not participate, but that has changed. It's an educational and social trend and logically they feel more inclined to participate. We tend to forget that football is one of the most accessible sports to practice.
There are several different causes; one that I can think of at this moment is probably the commercialisation of football in women's magazines, the large number of models and pop stars that are having relationships with top football players, the participation in TV commercials during football games. Football has become a middle class or even upper class sport rather than working class which it was originally. Football stadiums have become more sophisticated and attractive, the whole ambience has become more or less like a carnival, where people are wearing masks or funny dress and of course women like that. Then of course there is the globalisation of football in every corner of the world thanks to satellite TV.



Some sociology experts say society’s “equal opportunities” mindset of recent years has helped encourage women to take up football. Women are particularly attracted to football as a sport because of its reliance on skill rather than physical strength and because of its accessibility. One sociologist has seen an improvement in the infrastructure for women but another says they have not seen a massive increase in the numbers of women who play football - it varies from country to country.

Q22. *And what do you think has driven the increased numbers of women playing football in recent years?*

Sports sociology experts:

General opening of activities which were previously male dominated.
Football is getting more media attention. Not just in the news papers but in radio and television as well. I think it has become more of a sport where there’s serious attention given to preparation and fitness. Consequently, it’s seen as an acceptable athletic activity where females can participate. In the States and maybe here to a lesser extent, it’s an alternative to the more physically involved sports like American football in the U.S, or rugby here where physical contact is an essential part of the game. So soccer will attract more numbers of women because of its emphasis on skill and the reduced emphasis on physical contact.
There has been a change in the society’s attitude towards women playing football. It was seen as a masculine sport, which it still is, but there has also been a slight feminisation of the game. There has been more funding put into it, all to do with equal opportunity. Also the popularity of football in countries such as the U.S and China; globally it’s seen as very skilful now and taken more seriously. There are equal opportunities and more women see it as acceptable to be playing.
It is complicated. There is a tendency for women to be more involved in masculine sports. It is an increase in the will of women towards equality. There has not been a massive increase in women playing football. Once again it depends on the country, it’s different in Northern European countries but in Switzerland, France and the Latin countries there are still just a few women playing.
The popularity of football and the fact it’s so easy to play, plus the fact that now there are female football schools. Now there are female teams that were non existent before. There has also been an improvement in the conditions for women to able to practice this sport. The national football federations are working on the promotion of women’s football, and the Andalusian Federation has been promoting the participation of women in every field related to football, even refereeing.
It’s all the product of general emancipation of women in last 15-20 years. Young girls want to get involved more, the media definitely had an influence on that.



B. How the game has benefited from increased participation of women in football

Economic experts say the increase in women’s participation in football has had only a minimal impact on the amount of revenue created by football. However, social experts are able to say that there are specific sectors that have benefited; they have seen merchandising, increased attendances at matches, increased advertising and marketing opportunities, and more sales of women’s football equipment and clothes due to an increase in the participation of women in football.

Q23. How has this change in the participation of women in football contributed to the amount of revenue created by football?

Sports economic experts:

Virtually nothing.
There is no significant change.
It will have an effect on the amount of fans a team has, but the economic impact would be minimum.
I don't think it has made a difference.
It's just a larger audience that contributes to the amount of revenue.
It's insignificant.
It has transcended the whole family, not only father and son are watching football now, but also mother and sister have joined in.
It has contributed to a very positive change because about 30 years ago the quota of women participating in football was less than 10%.
It can't really be measured.
It's insignificant.
On that field not significantly.

Sports sociology experts:

Just through increased gate and merchandise.
It is a bigger market for football stores as well as an increased population to fill the stadiums. I think it has also meant increased advertisement opportunities for commercial sponsors associated with the games.
Obviously more women going to football matches might increase the revenue. One of the things that is starting being touched is the merchandising, that's in terms of clubs making more money selling women fitting shirts as opposed to the one male size. So I think there are a lot of markets the clubs and sports organisations can try and exploit as a result of women. Overall there is more revenue from ticket admissions, more money in registration for clubs, more revenue from coaching courses, and referee courses. Football clothes manufacturing in general will be selling more kits to women specifically.
It can open the market but it is still very small. There is an increasing interest from feminine products, media. Sports clothing brands also had to open themselves to female clothing in order to avoid ignoring half the population.
A few years ago there was no football equipment for girls, so the participation of women in football has opened new business opportunities for football clothing brands that have invested in manufacturing specific clothes for female players. I used to play football myself and whenever I needed new boots I had problems to find ones that fitted me. Now it's different and there is more demand for football clothing from women than before, this obviously has benefited sports clothing brands.
It's evident that marketing and TV are trying to involve women as much as possible. We can see more family or even pure female products that have been presented on football games, or during TV transmission which is proof that more women are watching football. I can recall that wasn't the case 10 or 15 years ago.



Economic and social experts have varying opinions on the amount of spending on football they think is done by women. This percentage is cited at as low as 2% by a UK economic expert and as high as 35% by a German economic expert. Around half of the experts say the figure is somewhere between 5% and 15% of total spending.

Q24. What percentage of the total amount of spending on football do you think is spent by women? Please include all types of football related spending in your estimate, such as tickets, food and travel to watch games, merchandise and TV subscriptions.

Sports economic experts:

10% in total.
2-5%.
20% in total.
A very small percentage, but I wouldn't know a value.
I think it would be around 10%.
30% in total.
I think it is less than 10%.
Maybe around 10% in total.
Between 15 and 20%
It might be on a quota of 35% women to 65% men.
I think it is inferior to 15%.
I can only talk about Croatia, and it is around €300.000 per year.

Sports sociology experts:

A quarter to a third of the total amount.
It's probably still quite small, I would say about 5%.
It's often men that bring women to the stadium, I would say that it is less than 10%.
I think the percentage so far is very small but the potential for growth is quite high. At the moment it isn't more than 6% which shows the potential for growth and business in the near future. It might seem like a small percentage but it's quite important if we take into account that a few years ago this same percentage wouldn't reach 1%. This figure will grow very quickly because the potential is very attractive.
10 - 15% in Croatia and around 20% in western countries.



Almost all of the economic and social experts say the participation of women in football will keep increasing over the next 10 years. Most experts think there will be continue to be a small to moderate increase. However, two experts say they would hope to see as many women participating as men. One social expert mentions that in the USA and Canada female participation rates are actually higher than for males. Another social expert says the football infrastructure for women is now starting to be implemented which will help increase female participation rates further.

Q25. Do you think the participation of women in football will change over the next 10 years, if so, how?

Sports economic experts:

Increased rate of women playing in the USA, nothing else.
Only a very small increase.
It will carry on growing at the same rate as it has in the last 3 or 4 years.
Obviously the trend shows that more women are following football nowadays but there won't be a direct effect. I don't think we'll see mixed (female/male) games soon.
Yes, but it won't be too different from what it is now, football will always be mainly a male sport.
An increased rate of participation by women.
It will increase very slowly. I don't see a big craze for female football or for women in football.
It might increase up to 15%.
It might increase by another 10 to 20%.
It will increase and I think that in the next 10 years it will even itself out to 50% men and 50% women participating in the football movement.
I don't think that it will change significantly.
I don't think it will increase as much in the next ten years, I think that in America and some other parts of the world it has reach the top level that it can, I personally can't see it getting any higher.

Sports sociology experts:

I think it's likely to increase. Similar to the current rate.
I would hope that the numbers participating would equal male participation. Ideally you would expect the percentage to be reflected across the range of sports. There will obviously be some differences but that would be the reasonable upper target to be set for female participation. It will increase to a point where there will be more balanced numbers. An obvious increase in the participation of women in recreational events, such as road-running and the women ten kilometers which has become very popular. So I see that women's participation in football would at least equal the most popular sports for women.
It definitely will. I think a lot more girls and then women will be playing. There has been a massive increase of girls that play at schools now, and I think they will be obviously forming senior teams. I think there will be an increase in teams and a move towards more professionalism of women's leagues across the world. You will continue to see a steady increase as well towards female spectators. So in terms of female players you could be looking at a 20% increase. In terms female spectators within men's football, I think that most women who go and watch it generally tend to go along. That will maybe increase about 10 to 15%. That's over five to ten years.
It will depend on the way football is presented in the future and on the role of organizations in the reassertion of women's football - I believe it will slowly increase. It depends on the country, in the USA or Canada, women's football is virtually more important than men's football in terms of spectators. I also believe that in Canada there are more female players than males. So generally there will be an increase of participation.
Of course it will change. When I used to play football female players wouldn't have a concept of technique because no one told us. Nowadays it is different, there are a lot of new female Football School. Here in Spain, the Superliga Femenina de Futbol is heavily promoted, with the support of professional teams that have organised their own female teams (Athletic de Bilbao or Espanyol which won last year's championship). Now there's a lot of talking about new female players. The Spanish Female National Team (Under 20's) won the last European Cup and there have been several breakthroughs that are changing the way we look at football and are making football more popular among women, which I think will benefit football.
Not as much as in the last 10 years, but it will probably rise a little bit.



Sociology experts say the increased participation of women has so far only had a small effect on the game, such as a small increase in spectators, but the female influence is likely to increase in the future. One expert says it has had a positive influence on the role of women in society, and another says it has improved the atmosphere surrounding football.

Q26. *What effect has the increased participation of women had on the game?*

Sports sociology experts:

Very little other than more money.
It effects society as a whole, where there is an equal opportunity agenda in many countries. I think that it will extend to societies where presently women are considered in subservient roles. In terms of behaviour in the game itself I don't think it really has had an effect. It's the same rules, the same form of activity, the same level of fitness required. Females are equally streetwise when it comes to playing football as many male players.
In some areas there's a bigger drive towards professionalism. That goes hand in hand with the media exposure that the game gets, on whether or not it's worthwhile that companies put money into it to fund it. Definitely within the UK there have been some attempts to do it but I don't think it's achievable quite yet. If women's football was developed properly then it would become the "people's" game rather than the "man's" game.
I don't think it had a big impact, in football anyway. It has increased the number of spectators a little, the "celebrity" side has been put forward more. But in regard to traditional sports organisations there haven't been any significant effects, they actually tended to resist it more than anything.
It's in the early stages and women will be more influential in the future. Football is not just a male sport any more - it's a sport for everyone. Let's say that it will become a sort of hybrid between what people in the USA think about football/soccer and what people in Europe think about football.
When it comes to the ambience, it has a motivating influence. Wherever there are women involved the attraction has increased, football has become more spectacular, and stadiums have become safer. I'm sure women had an impact on that.



Almost all sports sociology experts say more children are encouraged to take up football due to the increased participation of women. Half say as a consequence of more women in the game, football has become more corporate friendly. Only one expert thinks more women in the game has led to safer stadiums and less hooliganism in football.

Q27. Please tell me whether you think as a consequence of increased participation of women, football has gained in any of the following ways?

Sports sociology experts:

Score (out of 6)	Football stadiums have become safer	Football has become more corporate friendly	There is less hooliganism in football	More children are encouraged to take up the sport
Yes	1	3	1	5
No	5	3	5	1

Sociology experts say in particular girls have been encouraged to take up football because of the increased participation in football. Experts say football stadiums have become safer because of enforced restructuring rather than as a consequence of more women going to the stadia. The higher emphasis on safety by football authorities has also helped reduce the amount of hooliganism in football.

Football stadiums have become safer	Football has become more corporate friendly	There is less hooliganism in football	More children are encouraged to take up the sport
There's been an increase in concern about safety to force improvement in those areas. The higher prices and cost of admission go hand in hand with expectation of better facilities. So I don't think that female participation per se has been a major factor.	An increasing awareness of commercial opportunities, rather than the female participation. It might have changed the nature of the corporate involvement.	In the UK, increasing police activities and security has driven most of the hooligan elements out of the game.	Young girls see it as a viable profession and a fun recreational activity that can be played at any level. There's an increasing acceptance that you don't have to be good to play. It's played on many surfaces, so is not associated with a mud bath in the winter.
Stadiums are safer because of the initiatives the clubs themselves had to employ. It's not the presence of women that made them safer although it's possibly contributed. They were made more welcoming for children and women to go along.	Corporations now see there's a lot more potential because football spectators are not just working class men. It's now a much wider market that they can target.	I don't think women's participation in football would be a direct consequence. The demographic crowd has changed slightly but you will always have certain groups that are prone to be hooligans.	The popularity of women's football and women's interest in watching football increases the amount of girls playing so overall there are more children playing.
Not directly, there are other factors such as restructuring stadiums, control issues, following hooligans. Also the price increases in England have excluded part of the population.	I don't think so because it was already in progress. Although it can change companies' interest for football if there is a feminine audience because it opens the market.	Football is used by hooligans as a means to assert their identity. The fact that women are there or not doesn't put an end to that.	Women are an important involvement in children's education.
I don't think there has been any influence on this.	Not only for corporate, but for everyone...because sport is appropriate for all.	It's a problem that is being monitored much closer nowadays but I can't see a connection with the increase of women's involvement in football.	For boys and girls too because there are less barriers.



C. The prospect of market saturation in Europe

Most of the economic experts agree that revenue from football is reaching its saturation point in Europe (one expert states that there is still room for growth in Europe among the female population). Some experts warn that although interest is big in Africa and Asia, income levels are low so there is still only a limited market for spending on football. Asia is seen as the stronger candidate for growth compared to Africa.

Q28. Finally, some experts say that revenue from football is reaching saturation point in Europe and that the future growth markets are in Africa and Asia. How much do you agree with this statement and why?

Sports economic experts:

I disagree. There are no signs of surging income from Africa and Asia. The Asian economy has plateaued. Africa is not looking to invest the money necessary for it to happen.
That's right. Growth markets correspond with economical growth. More so for Asia than Africa.
There is still a way to go. There is potential in the long term in Asia but they don't have the same level of spending.
I personally think that the markets on those countries are not really accessible for all football clubs. Only those teams with fans outside their own countries will have access to those markets. If a percentage of the population in a country like China supports a European team, the merchandising sales of that team will increase, but I wouldn't say those markets are very accessible. The European market still has some room for growth especially for teams that haven't really entered the market. In Spain there are two football clubs that have a big market in Europe and Latin America, rather than in Africa or Asia. Both teams are from a region that has a history of people migrating to other European and Latin American countries. These people represent a potential market for these teams that hasn't been exploited. So I wouldn't agree with the idea of Africa and Asia being potential markets for growth.
Yes, totally. Nowadays Europe is over-saturated and it's very difficult to find new space for sponsorship, image exploitation or even to sell more t-shirts. Most of the markets in Europe are stressed while markets in Asia and Africa are increasing their presence and offer a lot more possibilities in fields such as merchandising or sponsorship.
Yes I agree. We are reaching a saturation point in Europe. But there are no signs of surging income in Africa. In some ways there is also a negative approach to the "effect of coming second".
I quite agree and I would say that in Europe there is strong competition with other sports, in particular in France with the rugby which is growing at the moment. As the growth of revenue in football is not unlimited and the competition of other sports such as rugby or even tennis, which is coming back, football won't keep on growing strongly. On the other hand, in Africa and Asian countries there is a potential. In Africa, football is already well developed but Africa is still relatively weak in term of its economic development. But if in China football carries on growing then China possesses an economic potential vastly superior to Africa. And football in China will know a development that Africa will certainly never have.
There is a natural phenomenon of saturation. Growth possibilities are already very advanced because people have only a certain amount of money they can spend. Less developed countries have the highest growth potential because they aren't that close to saturation yet.
I do not totally agree, because there is still growth potential in Europe especially amongst the female population. Whereas in Asia and Africa it will all depend on how they are going to evolve on a socio-economic level.
I agree with that statement. There is a really high demand in Africa and Asia. Well, the interest is big the only problem is that they are under developed.
I absolutely agree with that, now the third world countries will become a new market like Asia and some parts of Africa.



KRC RESEARCH

700 13th Street NW
Washington, DC 20005
+1 202 628 1118

101 Main Street, 8th floor
Cambridge, MA 02142
+1 617 661 0024

KRC RESEARCH
Fox Court
14 Gray's Inn Road
London, WC1X 8WS
+44(0) 207 067 0709
jwaby@krcresearch.com

Fox Court
14 Gray's Inn Road
London WC1X 8WS U.K.
+44 20 7067 0345