

Forbes

THE LEGACY OF EURO 2012

PL.2012 REPORT CONTENT PARTNER



Polska Grupa
Energetyczna

MAIN REPORT PARTNER



EURO 2012 THE POLISH EFFECT: GROWTH, IMAGE & TOURISM „LEGACY”

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“POLAND IS THE MAIN WINNER OF EURO 2012”



“The EURO 2012 Hosts have set the bar high. It will be hard to go beyond it in the future” - Michael Platini

“An enormous success far beyond any expectations.” - Martin Kallen

EURO 2012- THE POLISH EFFECT

IS MORE THAN THE BARCELONA EFFECT

BARCELONA EFFECT:

HIGHER TOURIST
ATTRACTIVENESS OF THE
COUNTRY – INCREASE IN
NUMBER OF TOURISTS AND
LONG TERM LOCAL
INCOME

NEW AND MODERNIZED
INFRASTRUCTURE –
ECONOMY BOOST

SOCIAL CAPITAL
– YES, WE CAN!

KNOW-HOW IN STAGING
LARGE CHALLENGING
PROJECTS



„LEGACY”

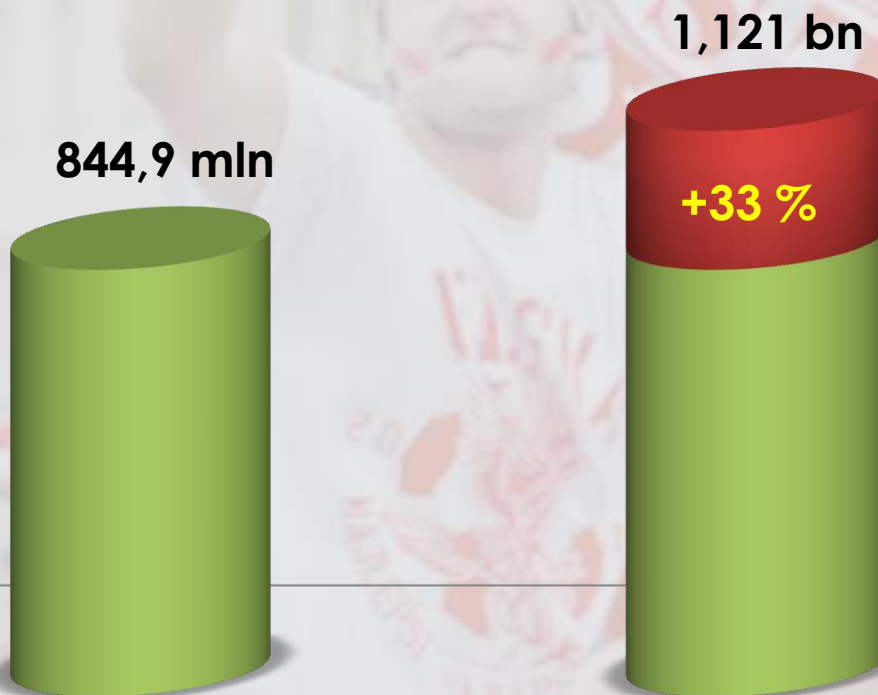
**NATIONAL BRAND AND IMPACT ON
TOURISM**

UEFA EURO 2012™ – THIRD LARGEST SPORT EVENT IN THE WORLD

- **677 000** FANS FROM 110 COUNTRIES VISITED POLISH STADIUMS
- **3,2 M** ENJOYED FAN ZONES IN POLAND
- **10 BN** TV VIEWERS
- **RECORD BREAKING NUMBER OF SPECTATORS SAW THE FINAL MATCH**
APPROX. **350 M** vs. **111 M** for Super Bowl Final

OUR GUESTS SPENT MORE THAN WE EXPECTED

Foreign tourists' expenditure in Poland during EURO 2012 (PLN)



- Average expenditure per capita: PLN 1 900
- The greatest numbers of the fans came from:
 - 49 000 Russia,
 - 49 000 Ireland
 - 48 000 Germany
 - 46 000 Czech Republic
- The longest stay by the Italians and Spaniards. The shortest stay by the Czechs.

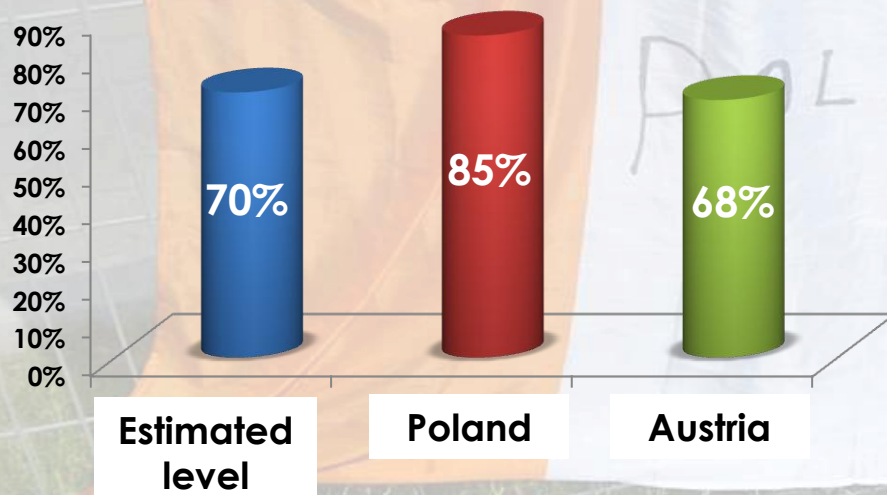
estimated (2010)

EURO 2012: the Polish Effect

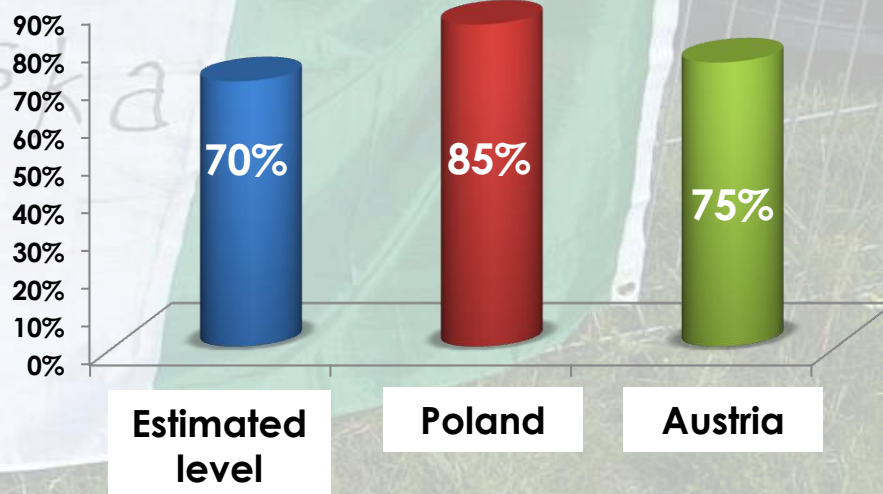
POLAND HAS BEEN SUCCESSFUL ORGANIZATION-WISE WE PROVED WE CAN COMPLETE DIFFICULT TASKS

FOREIGN TOURISTS HAD A HIGH OPINION

ORGANIZATION



SAFETY & SECURITY



CREDIBILITY !

POSITIVE IMAGE OF POLAND WORLDWIDE

Financial Times Deutschland:
„Love at first sight”

The Telegraph:
„This country has improved in every aspect in less than the past 25 years(...)
„Poland is currently a dynamic, passionate and exciting country(...)”

Le Monde:
„Poland glitters”

FEEL INVITED – ACTIVITIES STARTED IN JUNE 2011



Move Your Imagination
Polska

EURO2012
POLAND-UKRAINE

POLSKA BY J

Are you looking for an exciting adventure? You discovered the Polish mountains. The local highlanders, made my stay are fun, outgoing and incredibly warm after you sit down with them and "highland tea", anything can happen! Life, natural life, unlike the regular life here they have ski tracks that start in the mountains. What is worth recommending? A sleigh ride with torches. It usually ends out on the snow. Come and find out for yourself. Snow in southern Poland is very hot...

www.poland.travel/wintersports

INNOVATIVE ECONOMY
EUROPEAN UNION
EUROPEAN REGIONAL DEVELOPMENT FUND



POLSKA IN DEN AUGEN DER FUSSBALLFANS

Thomas und Melanie machte es großen Spaß, die frische Energie zu tanken, die durch die polnischen Städte fließt. Sophie? Sie fotografierte mehrere Memory Cards voll mit seltenen Vögeln und anderen wilden Tieren. Ewa war mit der Konferenz, zu der sie nach Warschau eingeladen war, hochzufrieden – ein perfektes Gleichgewicht zwischen Geschäftlichem und Partytime, sagt sie. Jürgen hat dies alles von oben gesehen, während er die Gipfel einiger polnischer Berge bestieg. Aber es gibt ein Spiel, das sie gemeinsam haben – Fußball. Komm und besuche die UEFA EURO 2012™ in den polnischen Städten: Danzig, Warschau, Breslau und Posen.

Move Your Imagination
Polska

EURO2012
POLAND-UKRAINE

www.polen.travel

INNOVATIVE ECONOMY
EUROPEAN UNION
EUROPEAN REGIONAL DEVELOPMENT FUND



POLSKA BY JOE

Come to Wrocław – a city where 5,602 guitarists jam for a day in a 1,000 year Old Market Square. Find all 150 sculptured dwarfs. Cross 117 bridges. Admire a 1,710 square metre painting for which a special building had to be built. Or just crawl through over 100 pubs and clubs. Find your own, unique experience.

www.poland.travel/wroclaw

Move Your Imagination
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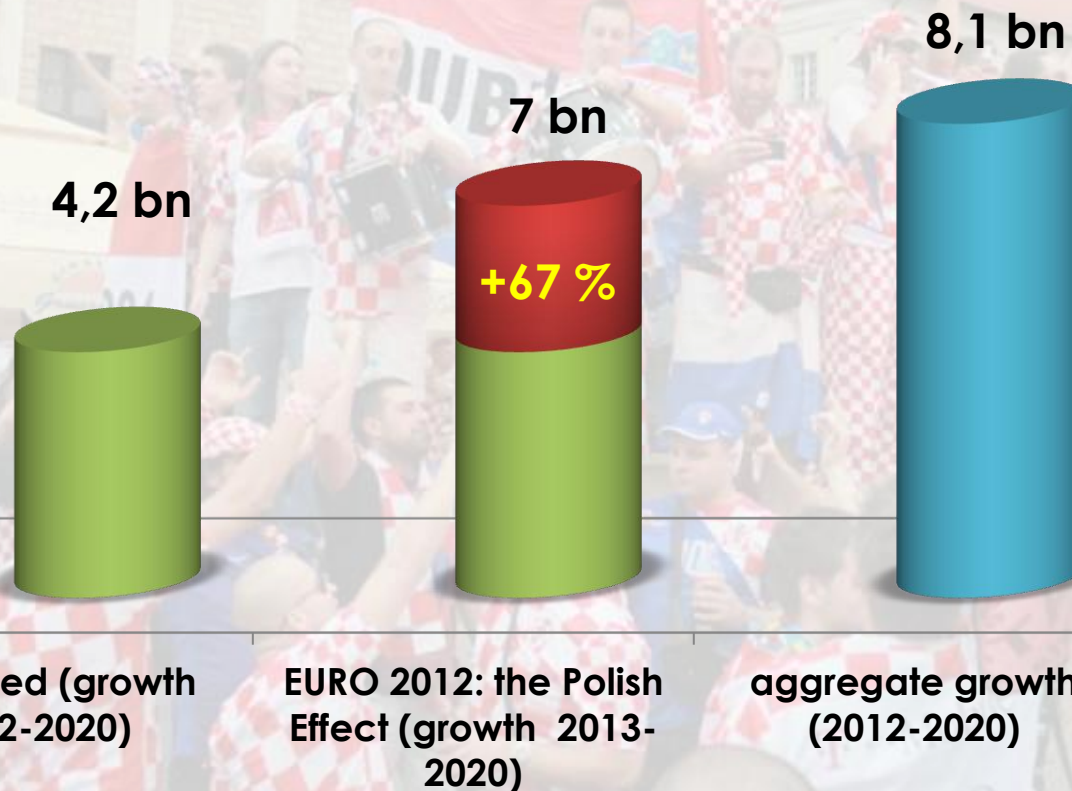
INNOVATIVE ECONOMY
EUROPEAN UNION
EUROPEAN REGIONAL DEVELOPMENT FUND

FEEL LIKE AT HOME – WELCOME CAMPAIGN



IMPROVED IMAGE, BROKEN STEREOTYPES – A CHANCE OF FUTURE INCOME

CHANCE OF HIGHER THAN EXPECTED INCOME FROM
INTERNATIONAL TOURISTS



- 79% foreign fans plan to return to Poland
- 92% foreign fans will recommend Poland as a country worth visiting
- Brand Poland increased its value from USD 269 bn to USD 472 bn in the beginning of 2012 according to ranking Brand Finance 2012

BRAND „POLSKA” – INCREDIBLE VALUE GROWTH

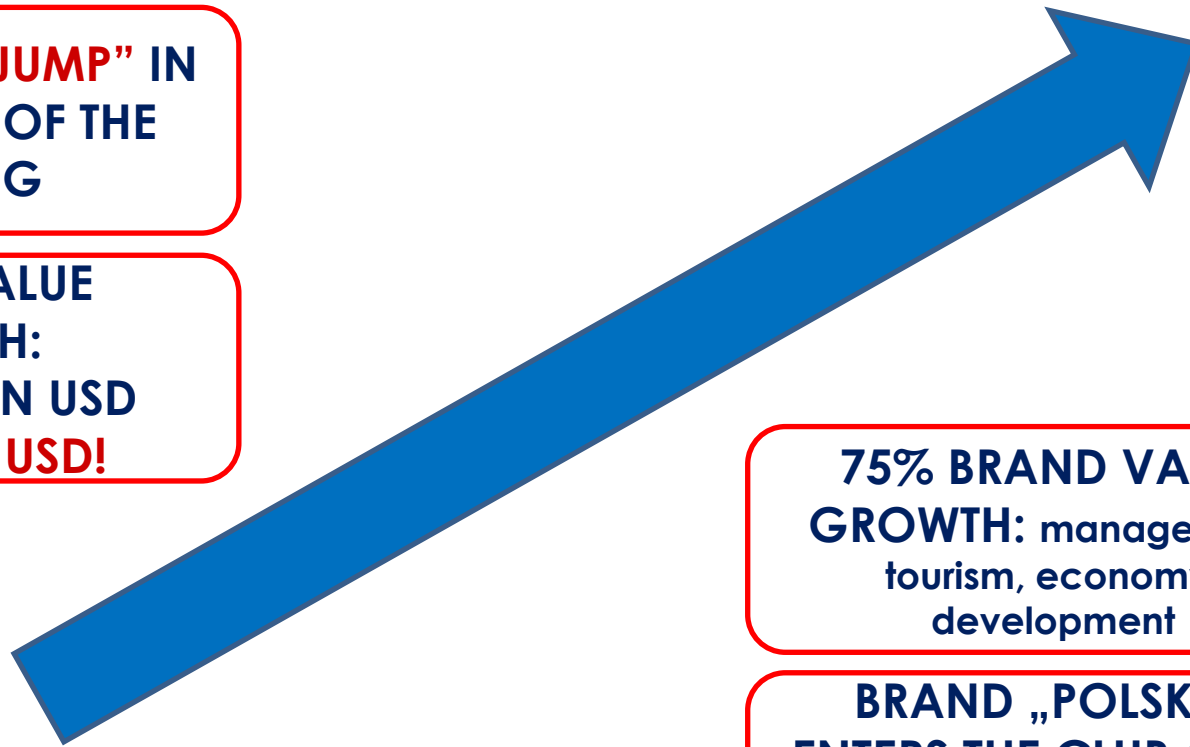
Research of Brand Finance Institute - London

**THE BIGGEST „JUMP” IN
THE HISTORY OF THE
RANKING**

**BRAND VALUE
GROWTH:
FROM 269 BN USD
TO 472 BN USD!**

**75% BRAND VALUE
GROWTH:** management,
tourism, economy,
development

**BRAND „POLSKA”
ENTERS THE CLUB OF 20
THE MOST VALUABLE
NATIONAL BRANDS**





„LEGACY“

**COUNTRY DEVELOPMENT AND
GDP BONUS**



EURO 2012 – COUNTRY MODERNIZATION AND CONSTRUCTION PROJECTS SPED UP

PLN 90 BN INVESTED

TRANSPORT INFRASTRUCTURE DEVELOPMENT ACCELERATED BY 3-5 YEARS

IMPACT REPORT – AN ACCELERATION THANKS TO EURO 2012



3 - 5 years acceleration of transport
infrastructure development

5 - 10 years acceleration of stadia
infrastructure development



IMPROVEMENT IN POLISH QUALITY OF LIFE



EURO 2012: DEVELOPMENT ACCELERATION, POSITIVE IMPACT ON THE ECONOMY AND FOREIGN INVESTMENTS

**AN ACCELERATION = IMPACT ON EFFICIENCY OF THE
ECONOMY, POSITIVE IMPACT ON GDP
FROM 2008 TO 2020 AT THE LEVEL OF**

PLN 21,3 BN
ex post

Source: IMPACT Report



„LEGACY”

**SOCIAL CAPITAL – WE ARE
A GOOD HOSTS**

SOCIAL CAPITAL – YES, WE CAN!

**9 OUT OF 10 POLES
CONSIDER EURO 2012
A SUCCESS**

POLES BELIEVED IN THEIR OWN SUCCESS

Do you think the 5 year preparation period for EURO 2012 caused:

- **93 % strenghtening the Polish image abroad**
- **86 % belief as a country good at organization and management**
- **77% volunteering development in Poland**
- **72 % increase in Poland economic development during the economic crisis**
- **71% development in infrastructure and Polish people life development**

Research methods: survey suported by telephone interviews (CATI) 29.06 – 1.07.2012
Sample size: N=1000 (representative sample of Polish adults)



„LEGACY”

WE ARE READY FOR MORE

CHALLENGING START



EUROPEAN MEDIA IN JAN 2008 : „POLES – WAKE UP”

PL.2012

IN 2008 WE AIMED HIGH

- AN ACCELERATION IN THE MODERNISATION OF POLAND (LIFE QUALITY)
- POLAND IMAGE ENHANCEMENT (GOOD ORGANIZER) – **TOURISM IMPACT**
- BUILDING SOCIAL CAPITAL OF POLES (YES, WE CAN!)
- GAINING EXPERIENCE AND KNOWLEDGE FOR THE FUTURE (MASS EVENTS ORGANIZATION MANUAL)

EFFICIENT COORDINATION AND COOPERATION WAS A CONDITION FOR SUCCESS

- **THE COORDINATION OF 219 INFRASTRUCTURE PROJECTS**
- **THE COORDINATION OF 250 ORGANIZATIONAL PROJECTS**
- **25 000 TASKS SUPERVISED IN PPM SYSTEM**
- **326 COMPLETED MILESTONES (2008 – 2012)**
- **413 COMPLETED CONTROLS (2010 - 2012)**
- **PREPAREDNESS AND IMPLEMENTATION COORDINATION OF
114 OPERATIONAL PLANS FOR EACH DAY OF THE TOURNAMENT**

98% OF GOALS ACHIEVED

**THE SUCCESS OF EURO 2012
IS A RESULT OF THE EFFICIENT
MANAGEMENT AND
COOPERATION OF ALL INVOLVED
STAKEHOLDERS**

THANK YOU ALL!



„LEGACY”

**POLISH EFFECT IS REAL
THE LEGACY IS HERE AND NOW!**

EURO 2012- THE POLISH EFFECT

IS MORE THAN THE BARCELONA EFFECT

BARCELONA EFFECT: HIGHER
TOURIST ATTRACTIVENESS OF
THE COUNTRY – INCREASE IN
NUMBER OF TOURISTS AND
LONG TERM LOCAL INCOME

+ PLN 8,1 BN

**NEW AND MODERNIZED
INFRASTRUCTURE –ECONOMY
BOOST**

**3 TO 5 YEARS OF
ACCELERATION,
AN IMPACT ON GDP
+ PLN 21,3 BN**

**SOCIAL CAPITAL
– YES, WE CAN!**

**9 OUT OF 10 POLES CONSIDER
EURO 2012 A SUCCESS**

**KNOW-HOW IN STAGING
LARGE CHALLENGING
PROJECTS**

**TESTED SOLUTIONS FOR LARGE
SCALE EVENTS**

IT WAS WORTH IT !!!

2 EXAMPLES OF „LEGACY HERE & NOW”

TOURISM

INFRASTRUCTURE & KNOW HOW

STABLE TOURIST GROWTH

- 11% - more tourists in 2012 comparing to 2011

- 7% - more tourist in 2013 comparing to 2013

GOOD MANAGEMENT OF STADIA AFTER EURO 2012 IS THE KEY



- SPORT IS ONLY ONE OF THE REVENUE GENERATING ACTIVITIES
- HOW TO USE THE POTENTIAL OF MODER MULTIFUNCTIONAL ARENAS

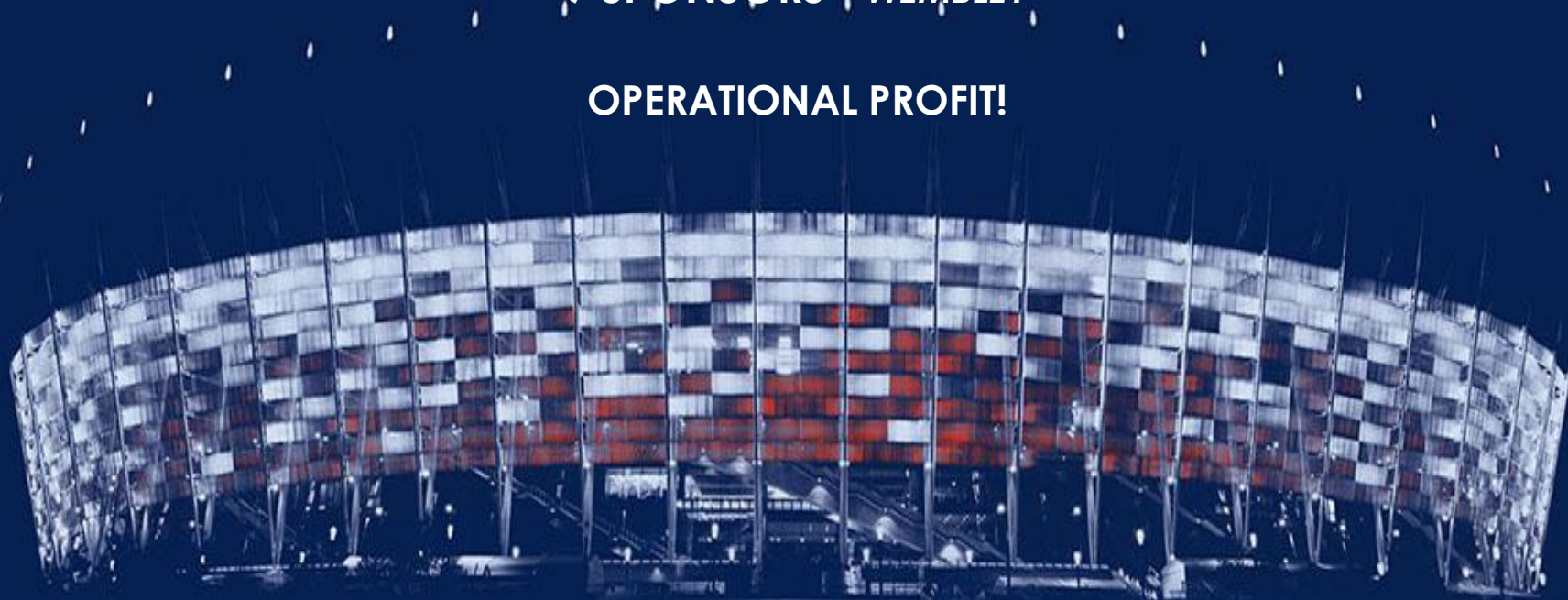
1 500 000 VISITORS PER YEAR – *the most popular place in Poland*

26 mass events – *STADE DE FRANCE*

400 business events – *ALLIANZ ARENA*

9 SPONSORS – *WEMBLEY*

OPERATIONAL PROFIT!





THANK YOU

**FEEL INVITED TO POLAND. ALWAYS!
YOU WILL FEEL LIKE AT HOME. ALWAYS!**