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South African Tourism
Impact of 2010 FIFA World Cup

Overall Impact of 2010 FIFA World Cup



Tourist Volume

- A total of 309,554 foreign tourists arrived in South Africa for the primary purpose of attending the 2010 FIFA World Cup
 - Africa – land markets accounted for 32% of total foreign tourists, followed by Europe with 24% and Central & South America with 13%

Tourist Spend

- The total expenditure in South Africa by tourists who came specifically for the 2010 FIFA World Cup was R3,64bn
 - Europeans spent the most in South Africa during this period
 - Most tourists spent their money on shopping, followed by accommodation and food & drink

Length of Stay

- Average length of stay by these tourists was 10.3 nights
 - Tourists from Australia and North America region stayed in South Africa for the longest duration

Geographic Spread

- Gauteng, Western Cape and KwaZulu-Natal were the most visited provinces during the 2010 FIFA World Cup receiving with more than 80,000 tourists visiting each of these provinces

Brand awareness

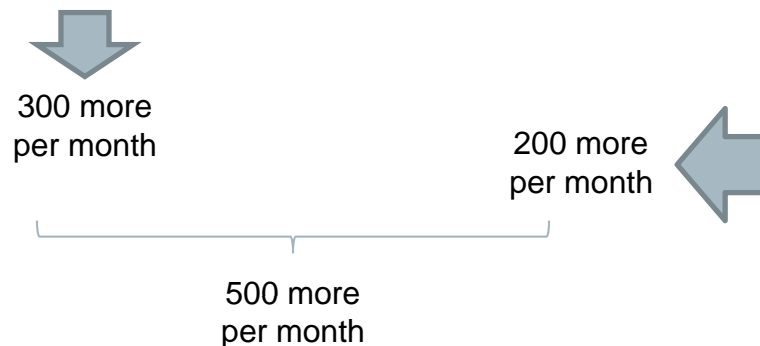
- Total awareness of South Africa as a leisure destination increased by 9% following the event
- The intention to visit South Africa in the short term increased by 35% following the event

Methodology (1/2)

SA Tourism Departure Survey

- Use existing Departure Survey methodology where we do a monthly tracking survey of departing tourists at OR Tambo International Airport, Cape Town International Airport and 10 land border posts to collect data on the travel behaviour and patterns of foreign tourists to South Africa
- An additional sample called a “booster” was used in June and July to increase the number of respondents in the sample to get more details on those who have visited South Africa specifically for the 2010 FIFA World Cup

Airports sampled		Total Sample
OR Tambo International	Main Sample	1822
	2010 FIFA World Cup Booster	220
Cape Town International	Main Sample	733
	2010 FIFA World Cup Booster	80
King Shaka International	Main Sample	145
	2010 FIFA World Cup Booster	0
Total		3000



Country	Border Gates	Normal Departure Sample Size	FIFA World Cup Sample Size	Total
Namibia	Alexander Bay	17	4	21
	Vroolsdrift	23	6	29
Zimbabwe	Beit Bridge	156	32	188
Lesotho	Butha-Buthe (Caledonspoort)	68	10	78
	Maserubrug	110	21	131
Swaziland	Oshoek	113	22	135
	Golela	60	10	70
Botswana	Kopfonteinhek	122	27	149
	Pioneer Gate (Groblersburg)	106	22	128
Mozambique	Lebombo	225	46	271
Total		1000	200	1200

- **SA Tourism Departure Survey**

- Stratified random probability sample (sample stratified based on country of residence – data obtained from StatsSA)
- Sample drawn at 95% confidence level with a margin of error of 2.0
- Respondent selected according to the UNWTO definition of a *tourist*
- Interviewer administered questionnaire using a combination of computer-based and paper questionnaires
- Respondents who indicated that their primary purpose of visiting South Africa was:
 - ✓ 2010 FIFA World Cup Spectator/Follower
 - ✓ 2010 FIFA World Cup Player/Official
 - ✓ 2010 FIFA World Cup Business participant
- Data was weighted back to the total population of all foreign tourists in June and July as published by StatsSA

- **SA Tourism Brand Tracker Survey**

- Routine tracker survey conducted by SA Tourism to assess the perception of South Africa as a tourist destination in key markets
- Conducted a “lite” version of this survey to assess the impact of the 2010 FIFA World Cup in promoting South Africa as a tourist destination in key markets in August and September 2010
- Online (web-based) survey in 13 markets with respondents recruited according to SA Tourism criteria of being between 25 and 70 years, with specific income floors and travel history (i.e. must have travelled long-haul to specific places) – most of the respondents have not necessarily been to South Africa
- Total sample size of 3,900 (most of these respondents have not visited South Africa)
- Data weighted on a combination of visitor arrivals from these markets to South Africa and marketing spend by SA Tourism in these markets

Calculating the Incidence of tourists who came to South Africa for the 2010 FIFA World Cup



Notation for Achieved Sample

- Let S = The total achieved sample for June and July
- Let S_{June} = The total achieved sample for June
- Let S_{July} = The total achieved sample for July

Notation for 2010 FIFA World Cup

- Let C = The total number of respondents who came to visit SA for 2010 FIFA World Cup and are from the normal sample
- Let C_{June} = The total number of respondents who came to visit SA for 2010 FIFA World Cup in June
- Let C_{July} = The total number of respondents who came to visit SA for the purpose of 2010 FIFA World Cup in July

	2010 FIFA World Cup (country by country)
Incidence for June	$\frac{C_{\text{June}}}{S_{\text{June}}}$
Incidence for July	$\frac{C_{\text{July}}}{S_{\text{July}}}$
Total incidence	$\frac{C_{\text{June}} + C_{\text{July}}}{S_{\text{June}} + S_{\text{July}}}$

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- **Impact on tourism objectives**
- Satisfaction of the trip
- Impact on Brand SA

South African Tourism Key Objectives



***Increase in
tourist volume***

***Increase in
tourist spend***

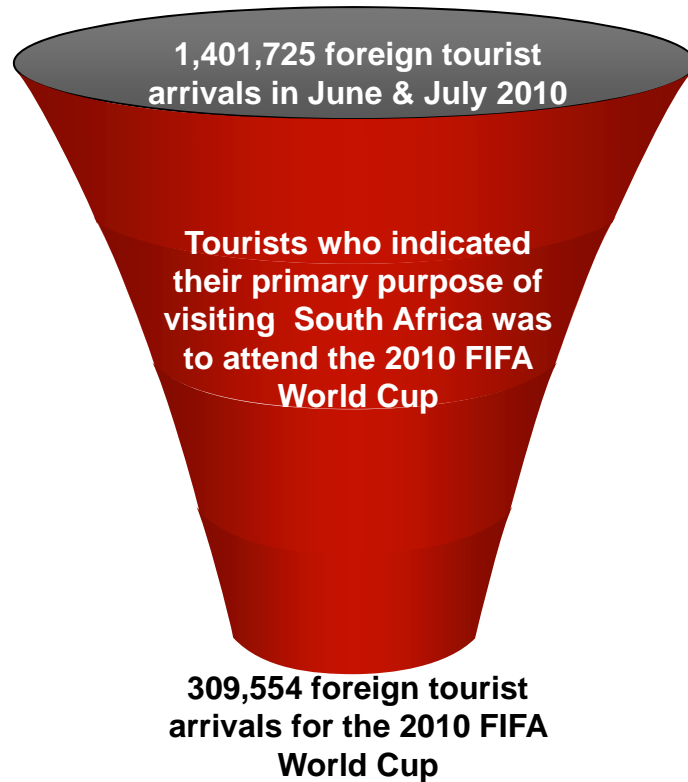
***Increase length
of stay***

***Improve
geographic
spread***

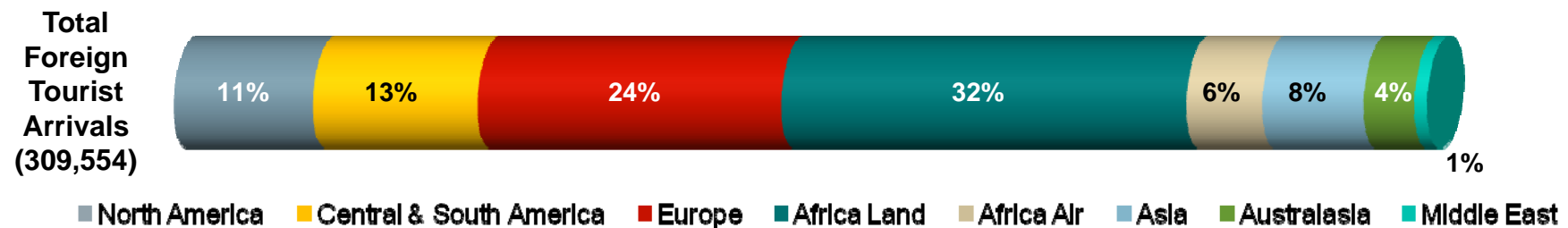
***Improve
seasonality
patterns***

***Promote
transformation***

There were 309,554 foreign tourists who arrived in South Africa for the 2010 FIFA World Cup



Tourist Arrivals from Top Source Countries in Each Region



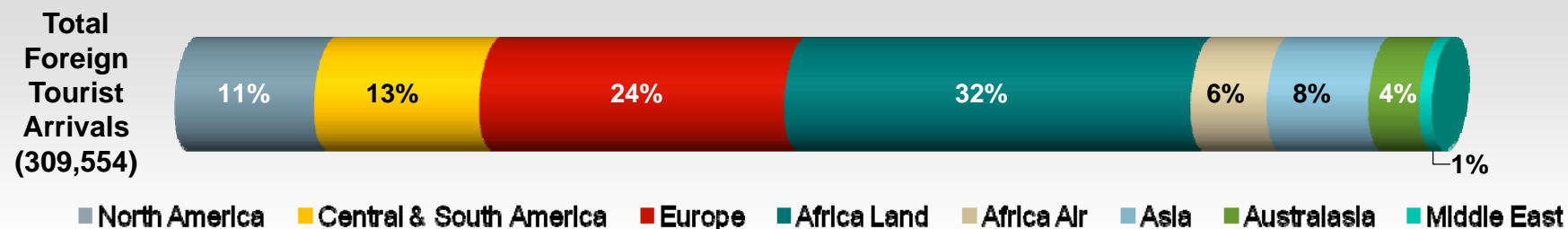
Tourist Arrivals to South Africa



Top Source Countries by Region

The US, UK, and Brazil were the top three source countries for South Africa during the 2010 FIFA World Cup

Tourist Arrivals from Top Source Countries in Each Region



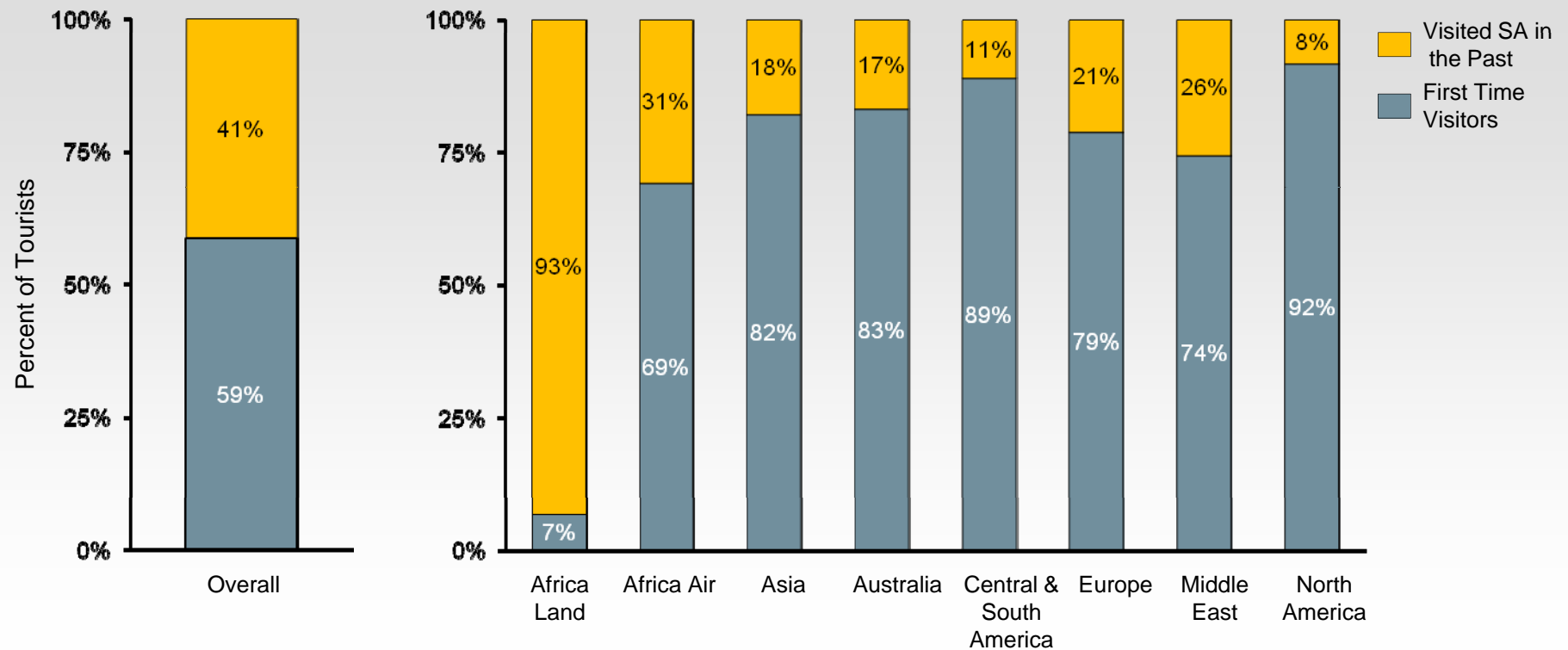
North America	Central & South America	Europe	Africa Land	Africa Air	Asia	Australia	Middle East
US 30,175	Brazil 14,815	UK 22,802	Mozambique 24,483	Nigeria 4,324	China 6,760	Australia 12,210	Israel 2,977
Canada 3,654	Mexico 9,680	Netherlands 8,741	Swaziland 19,593	Ghana 3,578	Japan 4,614	New Zealand 1,636	Saudi Arabia 311
	Argentina 8,757	Germany 8,596	Botswana 16,387	Kenya 2,089	India 3,086		Lebanon 261
	Chile 4,174	France 6,747	Lesotho 12,733	Algeria 1,941	Philippines 2,102		Kuwait 198
	Uruguay 1,359	Portugal 5,348	Zimbabwe 10,351	Mauritius 1,410	Korea Republic 2,040		Cyprus 156

Source: SAT Departure Survey

The 2010 FIFA World Cup attracted a large number of first time visitors to South Africa, especially from the Americas region



Past Travel History by Region

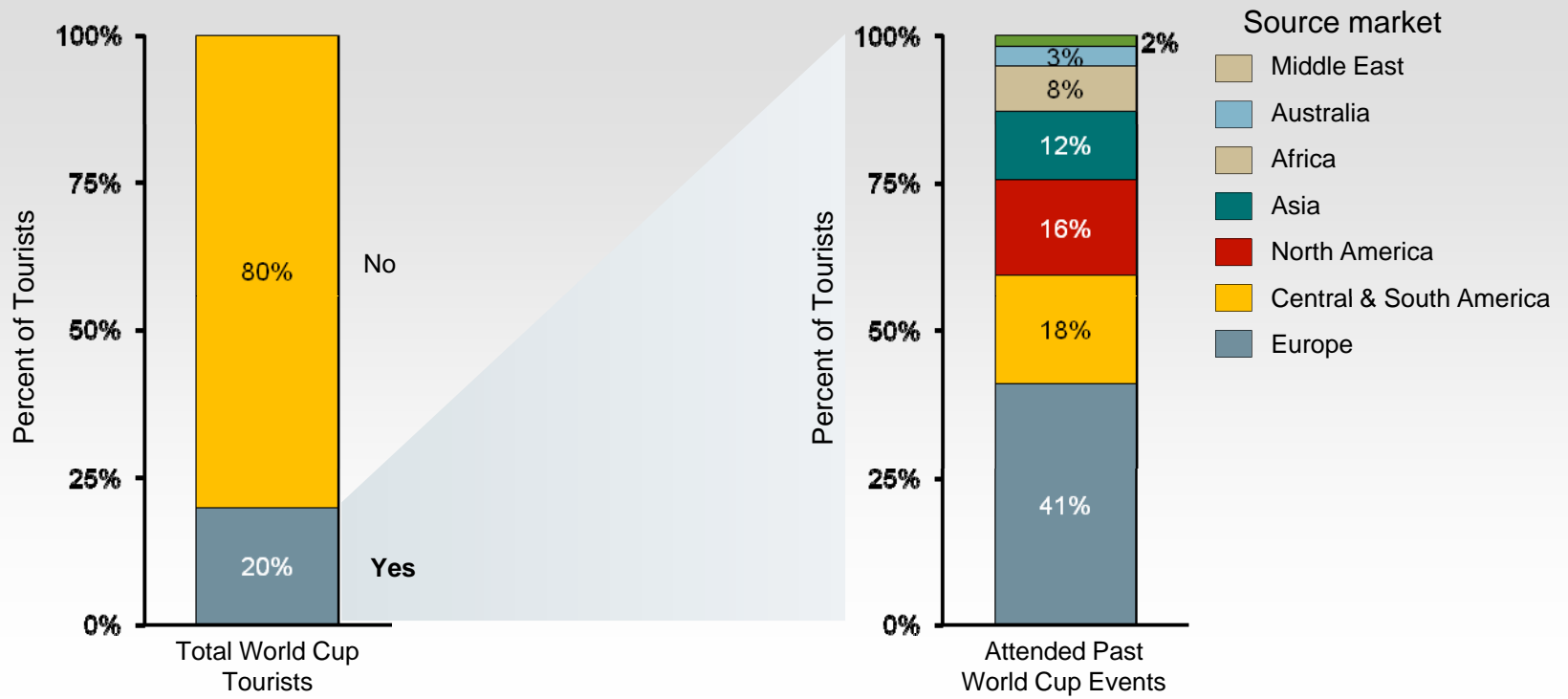


Source: SAT Departure Survey

Nearly one-fifth of the tourists had attended 2010 FIFA World Cup events held in the past. Most of these tourists were from Europe



FIFA World Cup Tournaments Attended in the Past



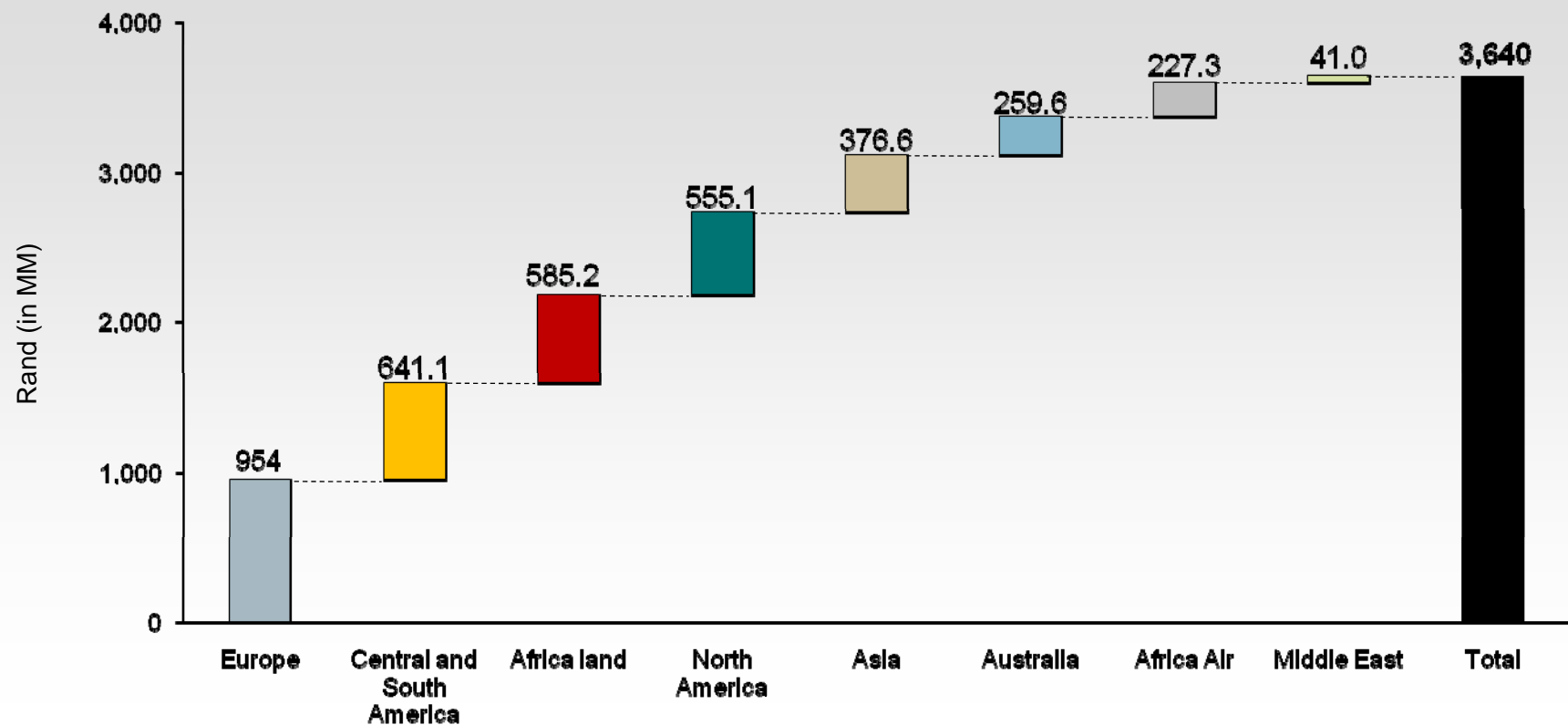
Source: SAT Departure Survey

Foreign tourists who attended the 2010 FIFA World Cup spent R3,64bn directly in South Africa



Europe contributed the most (nearly one-fourth) in the total revenue generated by the tourists that visited South Africa for the 2010 FIFA World Cup

Total Foreign Direct Spend (excl. capex) by Region



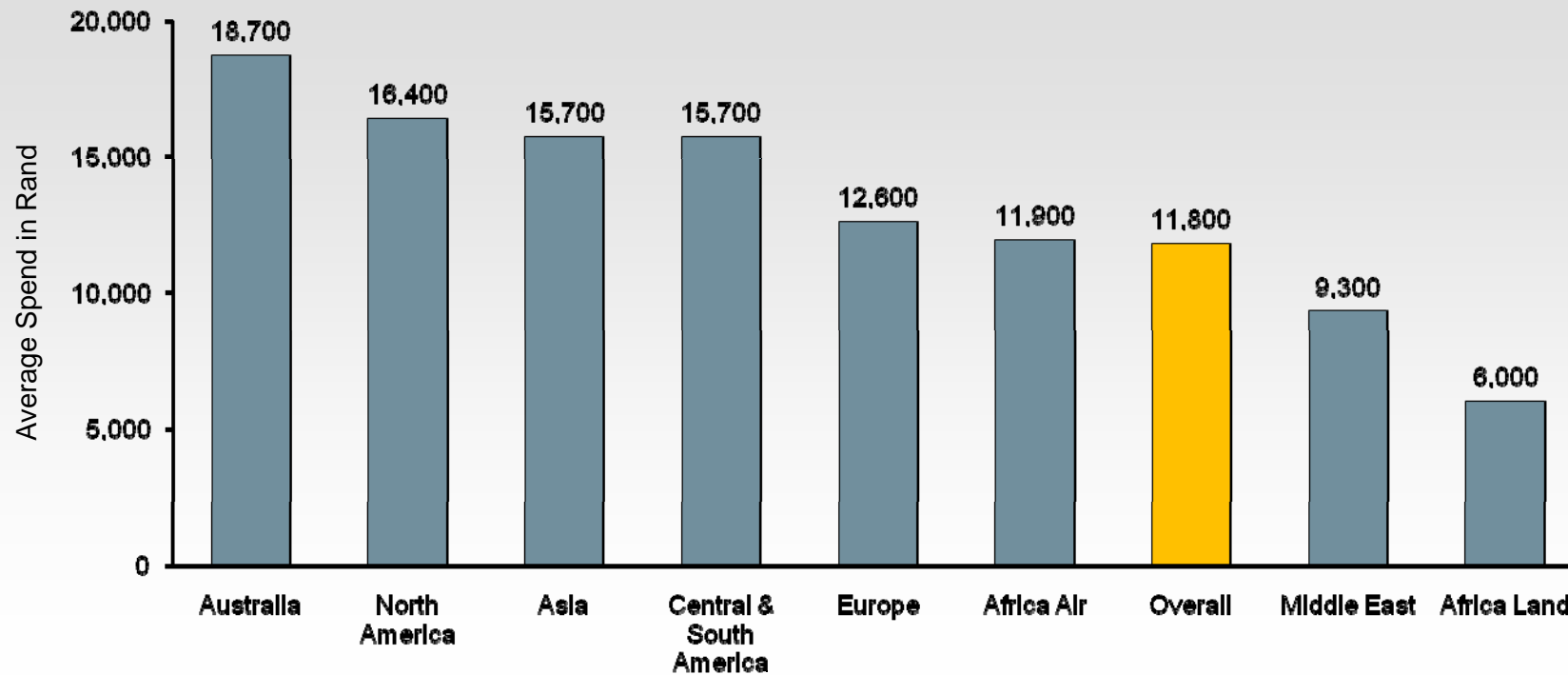
Source: SAT Departure Survey

Foreign tourists spent an average of R11,800 in South Africa for the duration of their trip



Tourists from the Middle East and the Africa land markets spent less than the total average; despite this, the average spend in South Africa was higher than the annual average of all foreign visitors in 2008 and 2009 (R8,400 and R9,500 respectively)

Average Spend by Tourists from Each Region



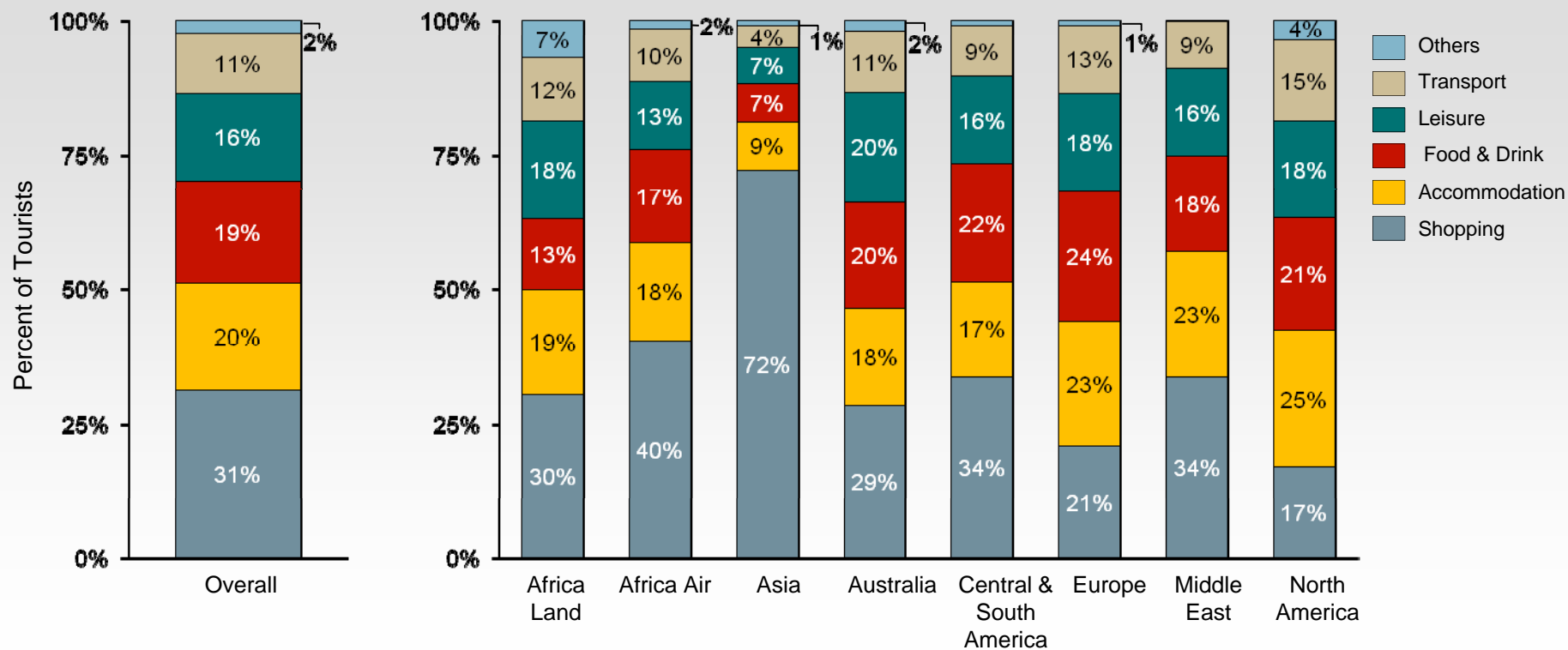
Source: SAT Departure Survey

Overall, nearly one-third of the amount spent in South Africa was spent on shopping



After shopping, accommodation and food & drink were the other categories where tourists spent their money

Amount Spend by Category



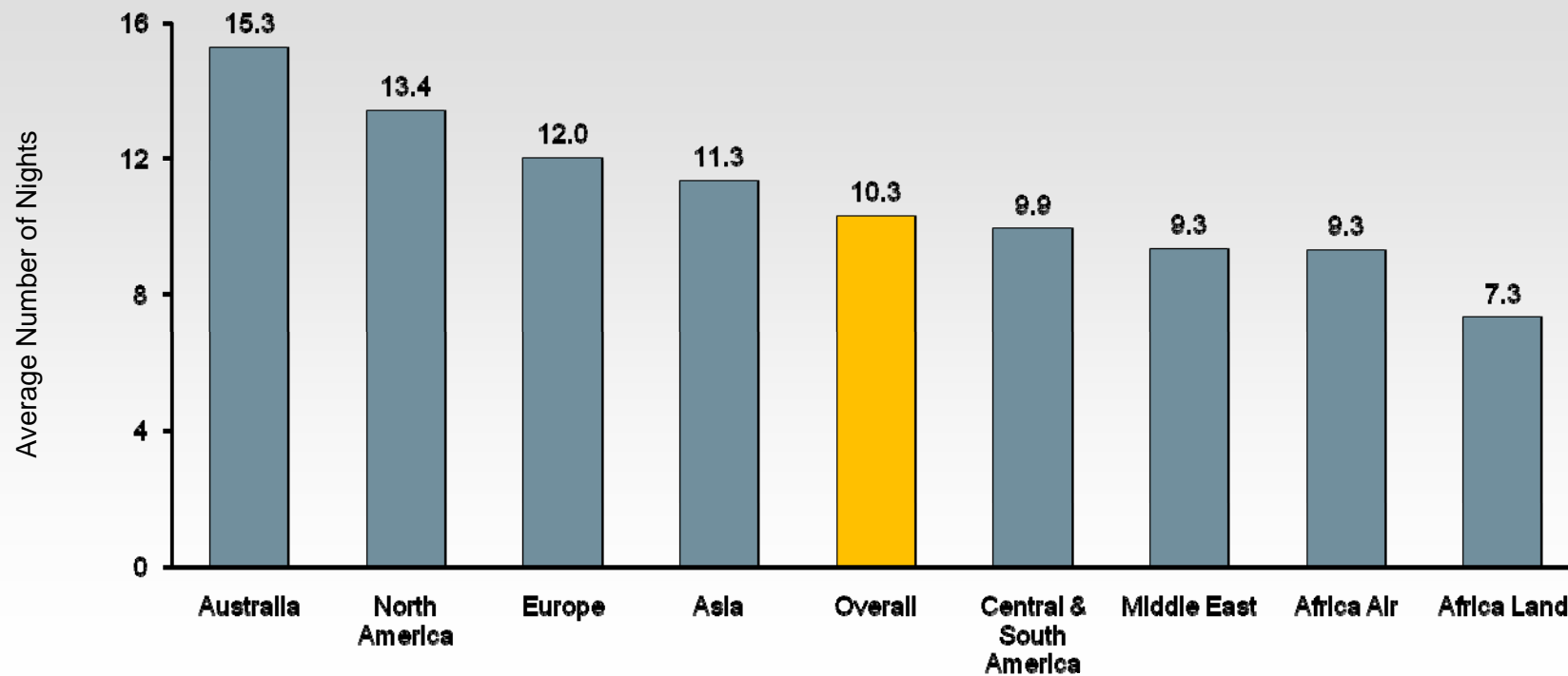
Source: SAT Departure Survey

Most tourists who attended the 2010 FIFA World Cup stayed an average of 10 nights in the country



Tourists from Australia and North America region stayed in South Africa for the longest duration

Average Length of Stay (in Nights) by Tourists from Each Region



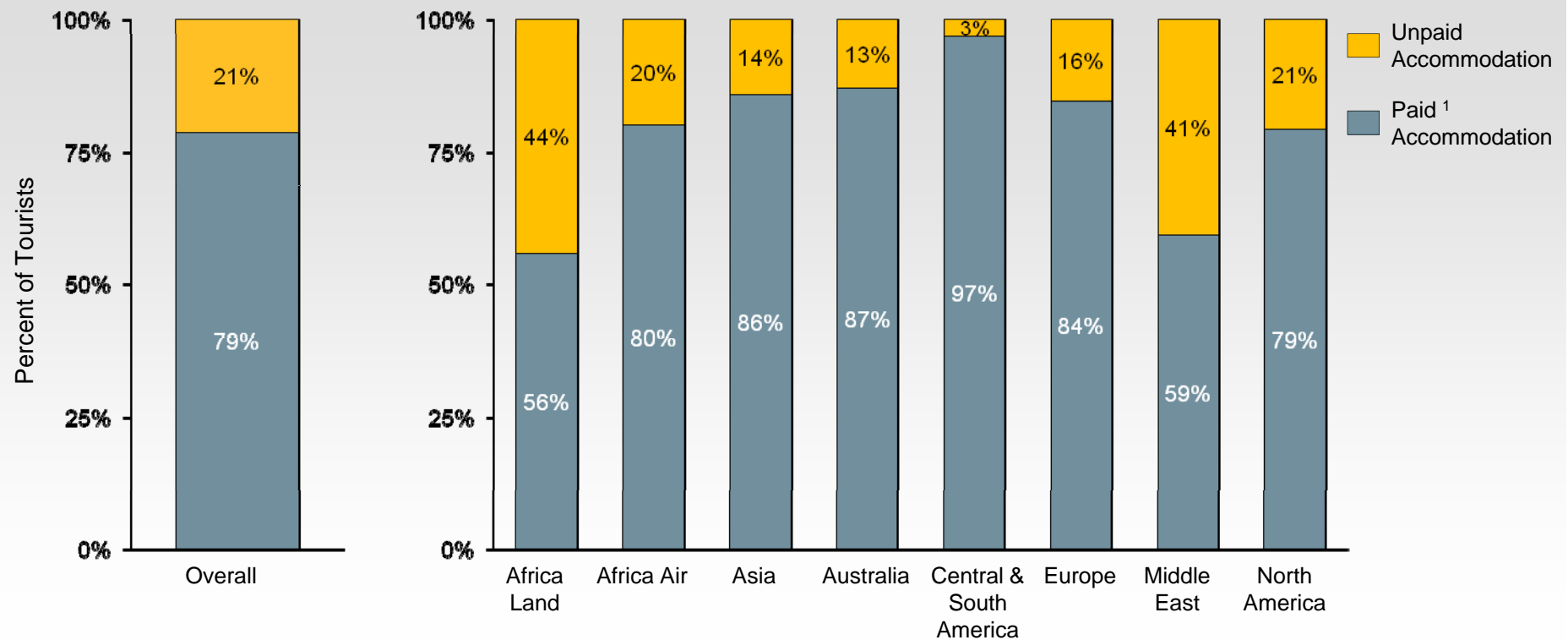
Source: SAT Departure Survey

Majority of the 2010 FIFA World Cup tourists stayed in paid¹ accommodation



However, nearly half of the tourists from the Africa land markets and Middle East stayed with friends and relatives

Nights Spent by Accommodation Type



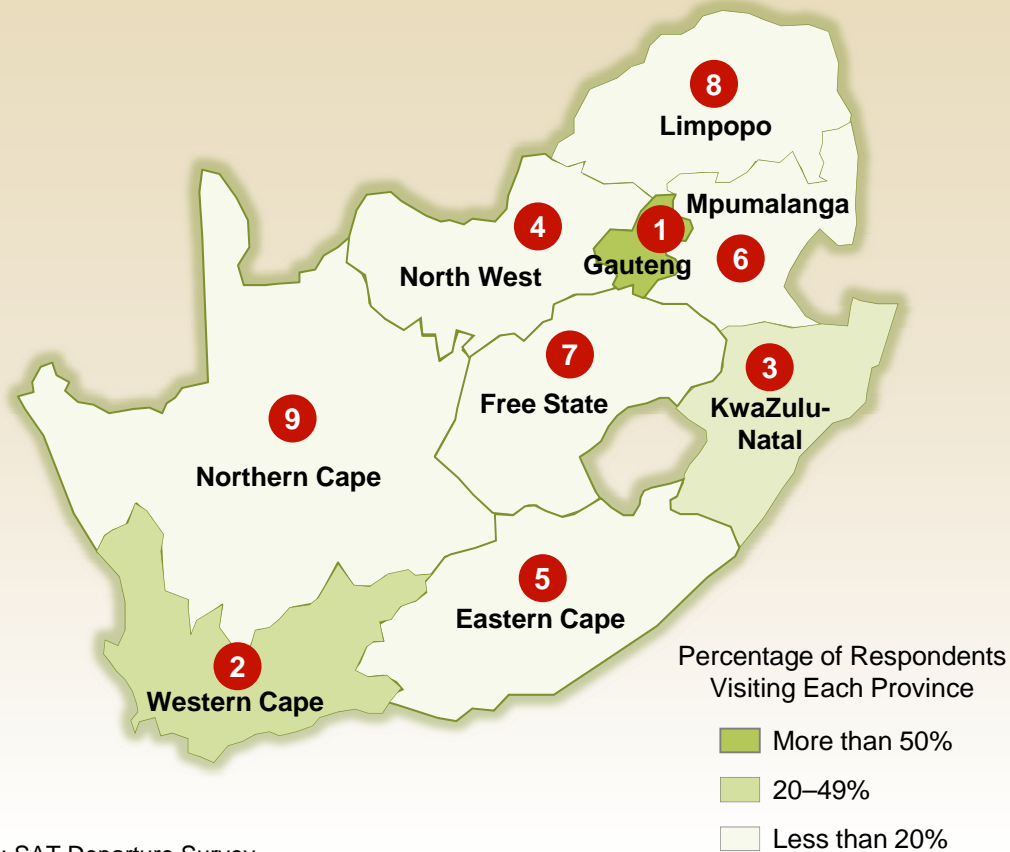
Note: ¹Paid accommodation includes all accommodation types except for staying with friends and family
 Source: SAT Departure Survey

Gauteng, which hosted majority of the matches, was the most visited province during the event



Over 80,000 foreign tourists visited Western Cape and KwaZulu-Natal

Provinces Visited During Stay



Province	Number of Tourists
1. Gauteng	223,039
2. Western Cape	108,384
3. KwaZulu- Natal	83,819
4. North West	59,006
5. Eastern Cape	48,304
6. Mpumalanga	40,173
7. Free State	27,950
8. Limpopo	20,829
9. Northern Cape	3,333

Source: SAT Departure Survey

Note: Numbers add up to more than the total as each person can visit more than one province

Fan Parks in Gauteng, KwaZulu-Natal, and Western Cape were visited the most; Cape Town and Durban drew the majority of the soccer fans



Fan-Parks Visited during Stay for 2010 FIFA World Cup

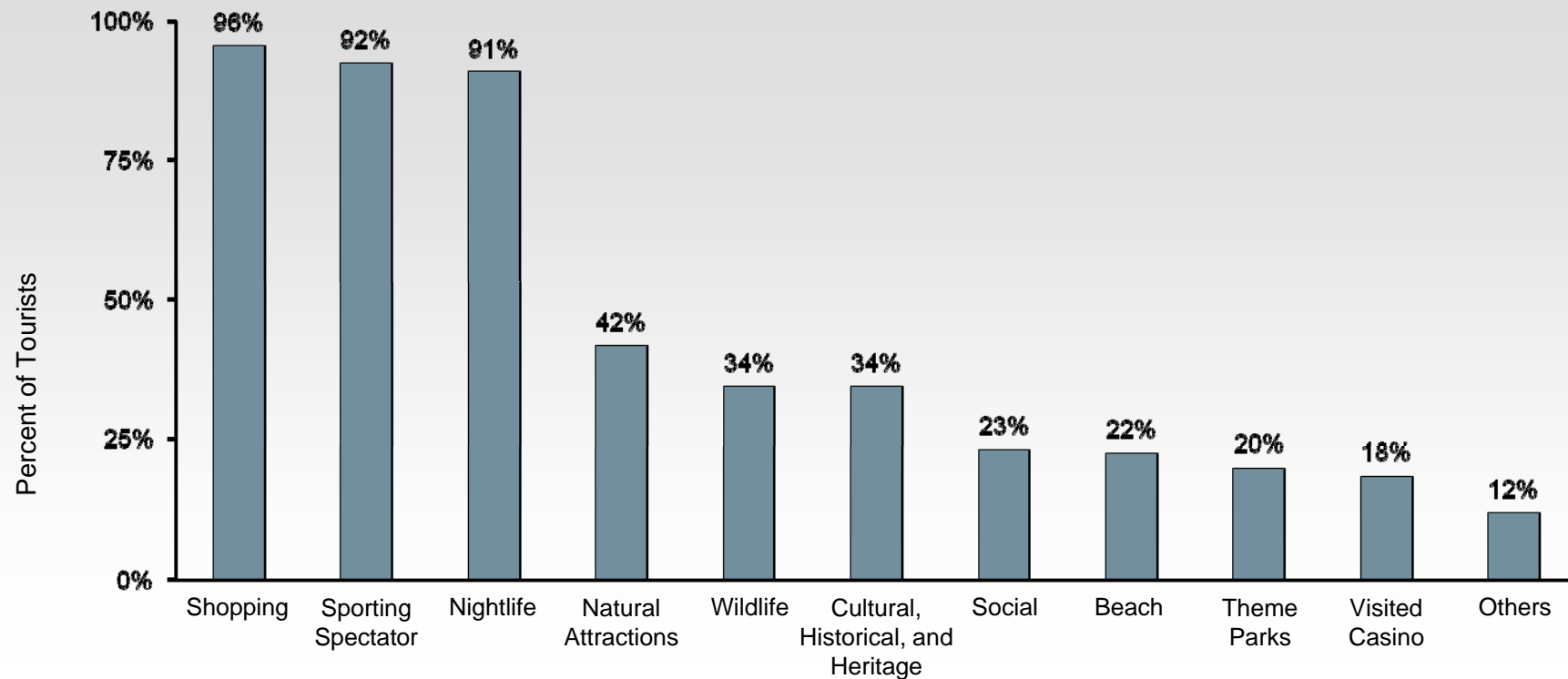


Source: SAT Departure Survey

Shopping and enjoying nightlife were the two most common activities which tourists engaged in, apart from watching the 2010 FIFA World Cup



Activities Undertaken During the Trip



Source: SAT Departure Survey

5% of the 2010 FIFA World Cup tourists indicated that they visited other African countries during their trip to South Africa



Other African Countries Visited During the Trip



Country	Number of Tourists
Zimbabwe	3,868
Egypt, Arab Rep.	1,988
Botswana	1,899
Zambia	1,852
Kenya	1,837
Swaziland	1,815
Namibia	1,268
Mozambique	1,107
Mauritius	983
Tanzania	823
Lesotho	732
Angola	535
Morocco	381

Country	Number of Tourists
Rwanda	296
Nigeria	275
Malawi	261
Madagascar	255
Cameroon	213
Ethiopia	213
Uganda	181
Congo, Dem. Rep.	151
Ghana	124
Seychelles	123
Mali	77
Senegal	62

Source: SAT Departure Survey

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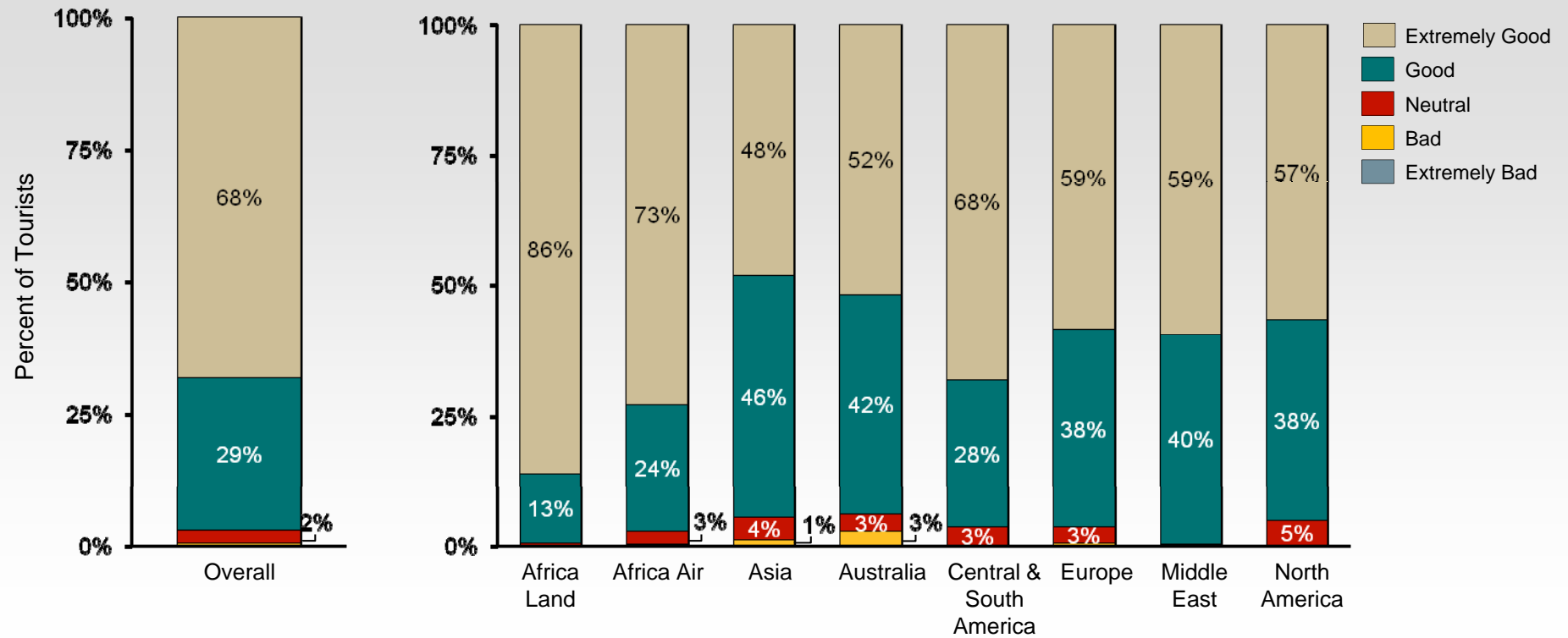


- Impact on tourism objectives
- **Satisfaction of the trip**
- Impact on Brand SA

More than two-thirds of the tourists who attended the 2010 FIFA World Cup, perceived South Africa as a great host



South Africa's Perception as the World Cup Host

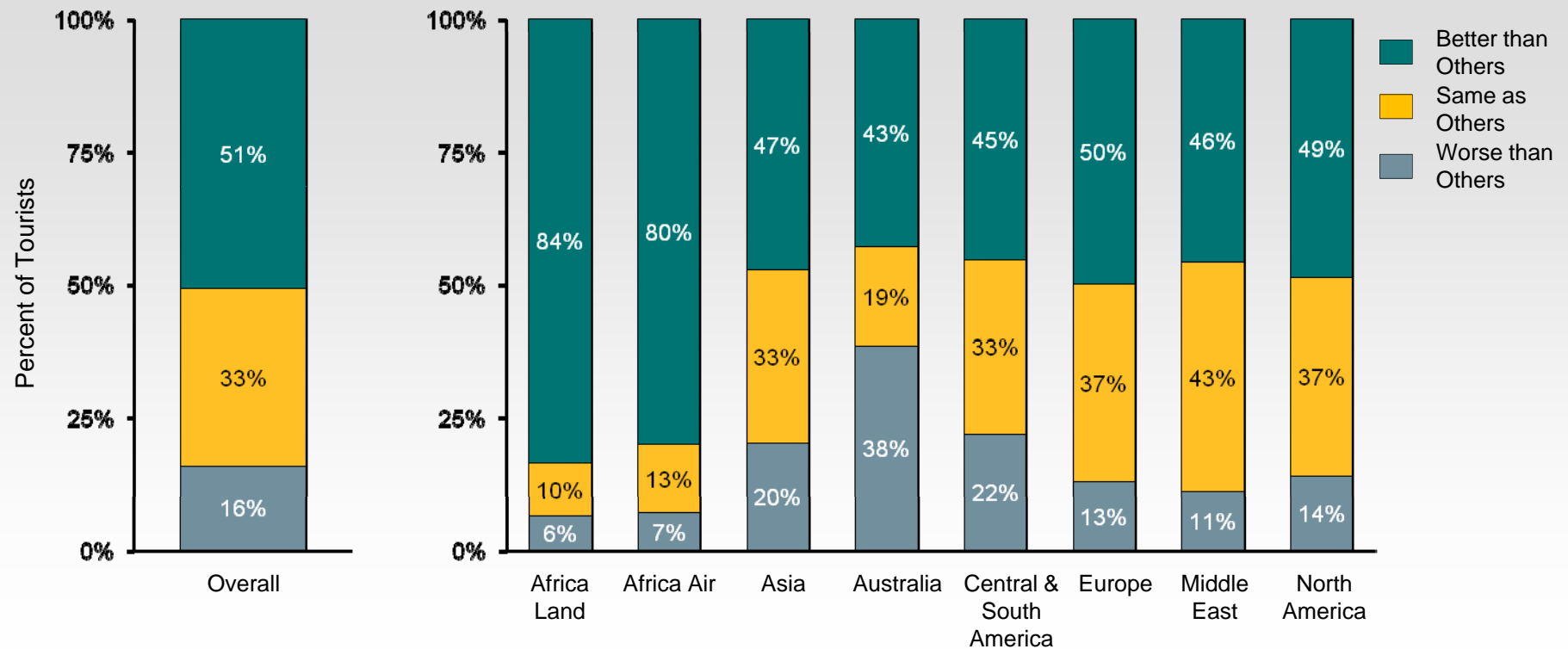


Source: SAT Departure Survey

More than half the tourists, who had attended the other 2010 FIFA World Cup events in the past, felt that South Africa was a better host than the countries that hosted the event in the past



South Africa's Perception versus Other FIFA World Cup Hosts¹

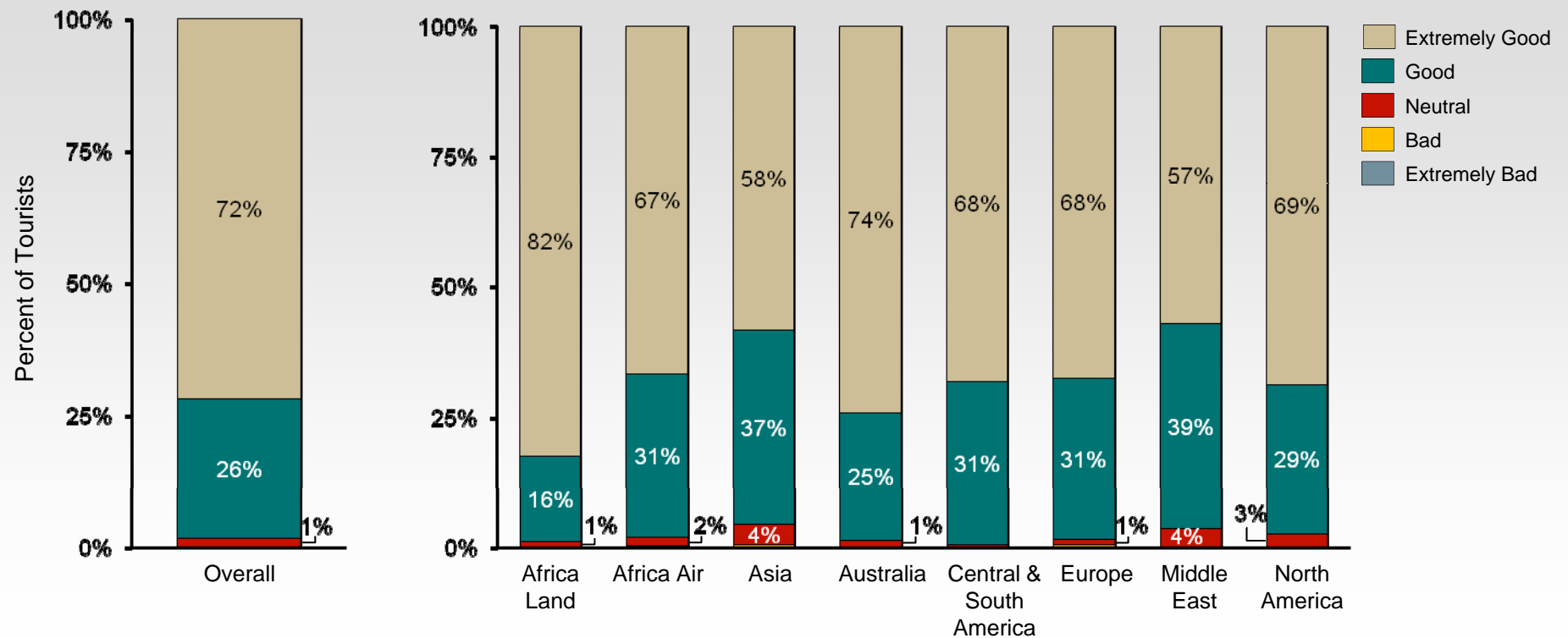


Note: ¹Based on travellers who attended the other FIFA™ World Cup events in the past
 Source: SAT Departure Survey

Overall, tourists were highly satisfied with their trip to South Africa, with nearly three quarters rating their experience in the country as extremely good



Overall Experience in South Africa

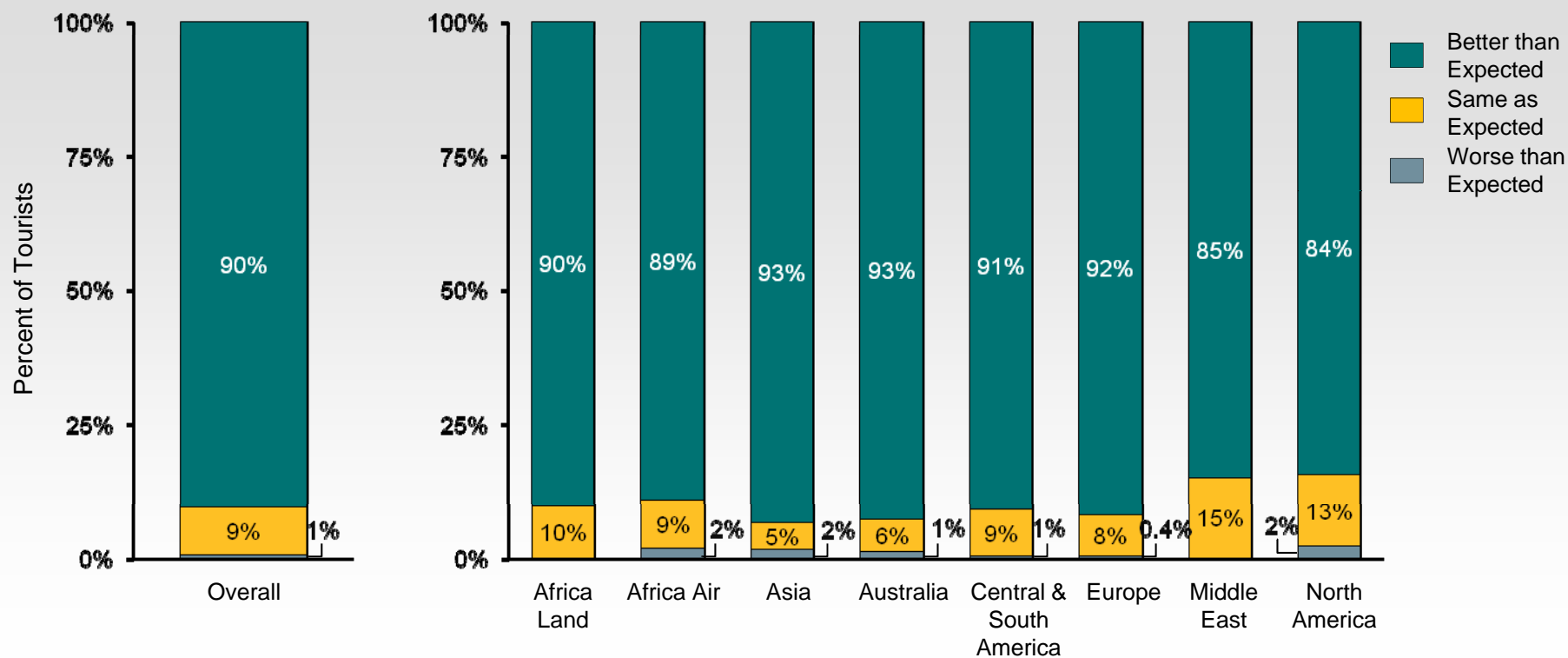


Source: SAT Departure Survey

Tourists also found their experience in the country much better than they expected before arriving to South Africa



Experience in South Africa versus Expectation

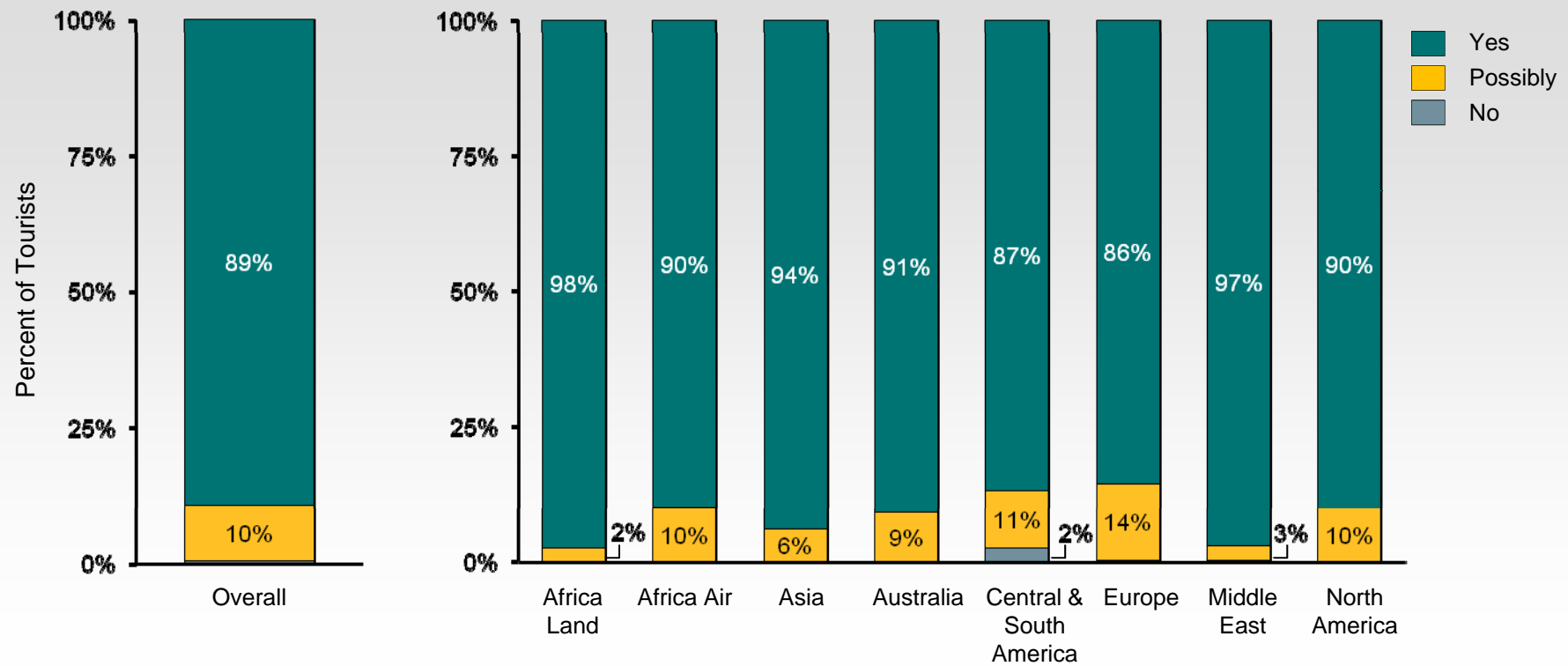


Source: SAT Departure Survey

Approximately 90% of tourists who attended the 2010 FIFA World Cup mentioned that they will consider visiting South Africa again in the future



Future Consideration to Visit South Africa

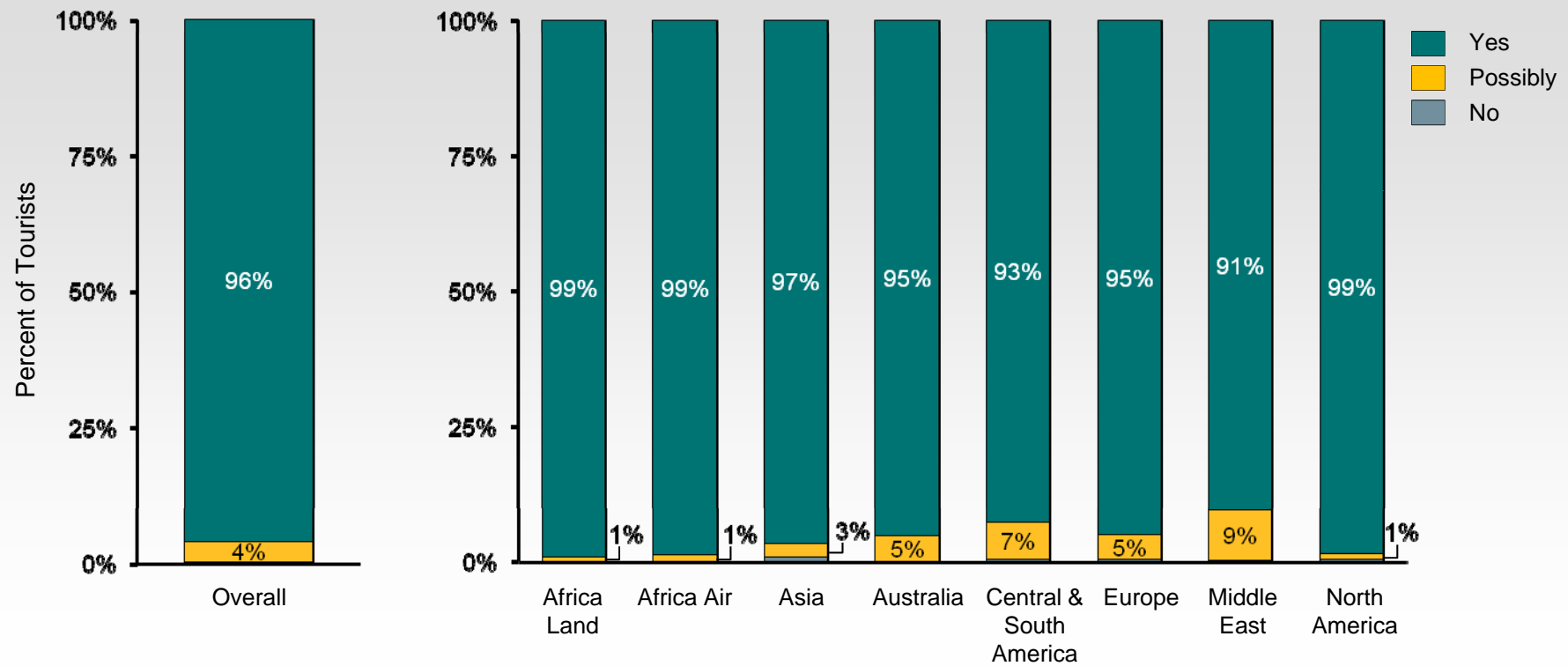


Source: SAT Departure Survey

Nearly every tourist that visited South Africa for the 2010 FIFA World Cup is willing to recommend the country to their friends and relatives



Recommendation to Visit South Africa



Source: SAT Departure Survey

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- Impact on tourism objectives
- Satisfaction of the trip
- **Impact on Brand SA**

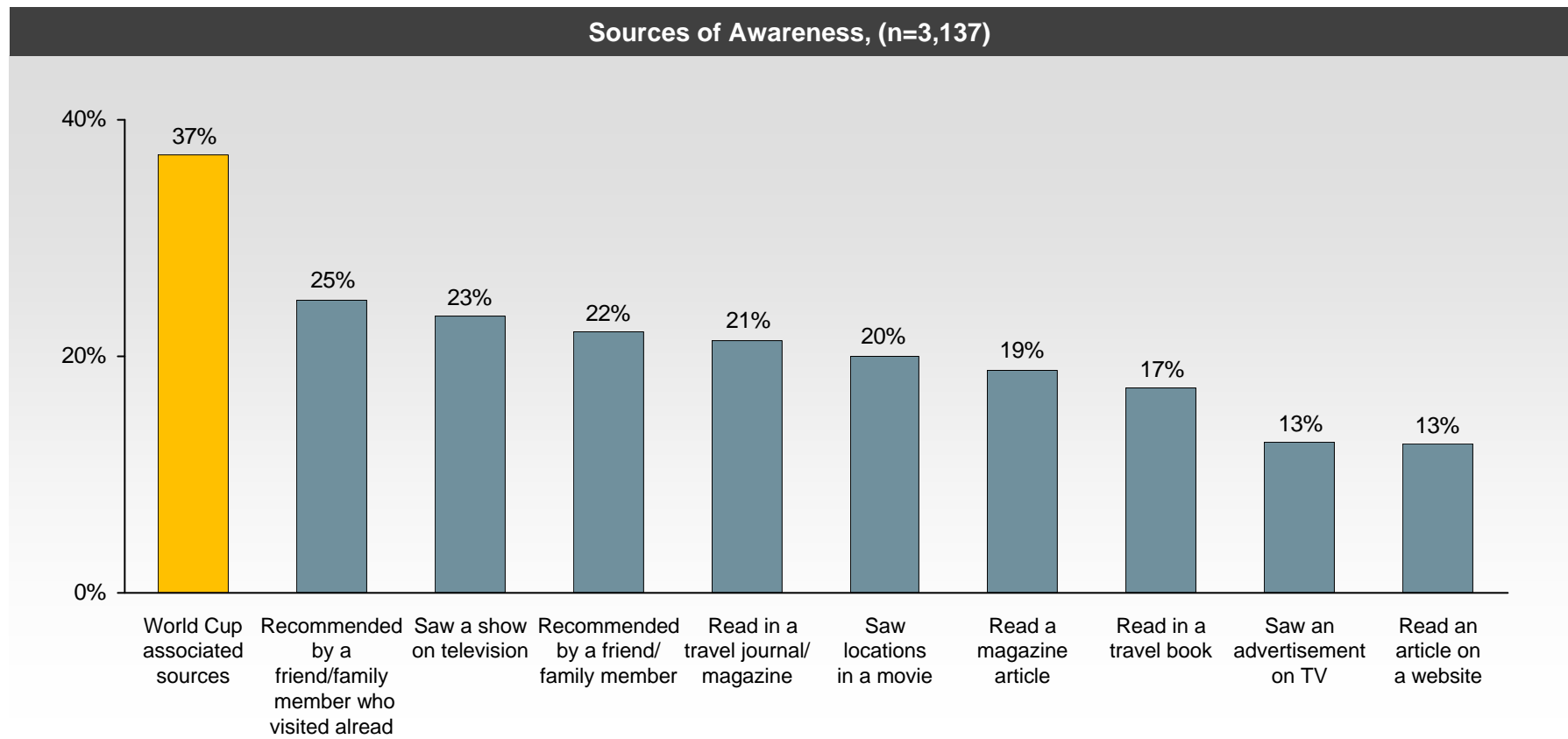
Globally, there has been a significant improvement in South Africa's brand, post the 2010 FIFA World Cup



Brand Journey Scores – Longitudinal Trend					
	2008	2009	2010 (Pre WC)	2010 (Post WC)	% Change (Pre and Post WC)
Total Awareness	76%	79%	78%	85%	+9%
Unaided Awareness	19%	19%	18%	20%	+11%
Positivity	37%	38%	37%	43%	+15%
Long Term Consideration	32%	32%	31%	38%	+22%
Likely to Seek info	18%	18%	18%	24%	+34%
Sought Info	22%	21%	22%	26%	+21%
Familiarity	20%	21%	21%	18%	-14%
Short Term Consideration	11%	11%	11%	14%	+35%
Visited Recently	8%	7%	7%	10%	+37%
Closure Ratio	1 in 2.75	1 in 2.88	1 in 2.91	1 in 2.59	+13%

Note: Core Markets weighted according to relative investment spend – Australia = 6%, France = 17%, Germany = 18%, India = 6%, Netherlands = 18%, UK = 18% & US = 17%; Investment Markets weighted according to – China = 32%, Italy = 43% and Japan = 25%; Global Average, according to investment spend: Core = 91%, Non core = 9%; 2008 (n=17,501), 2009 (n=17,430), Pre World Cup (n=8,705), Post World Cup (n=3,012)

More than one third of tourists mentioned 'World Cup associated media/channel' as their first source of awareness



In particular, locations featured, promotional campaigns and articles in magazines and newspapers were key sources that increased awareness of South Africa



Based on those who Mentioned World Cup Related Media/Channel as their First Source of Awareness, (n=1,164)

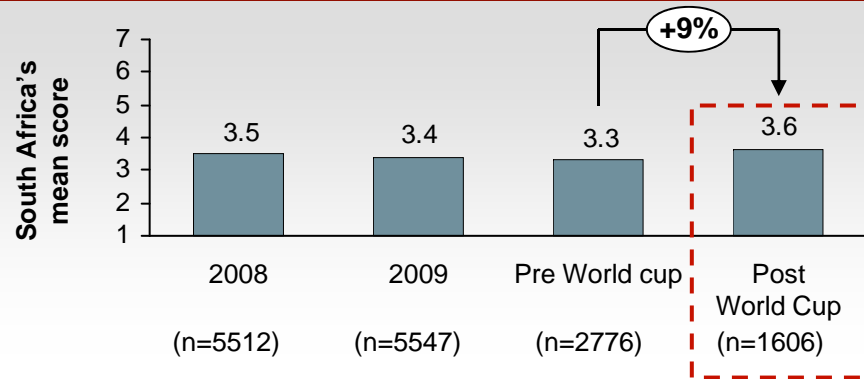


The 2010 FIFA World Cup did help improve the negative perceptions South Africa has on safety & security and value for money

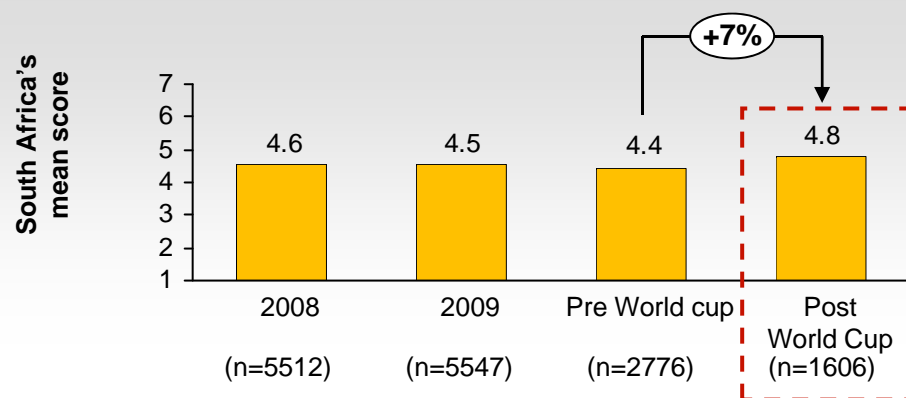


'Value for money' and 'safety and security' are rated higher post the 2010 FIFA World Cup

South Africa's Perception on Safety and Security



South Africa's Perception on Value for Money

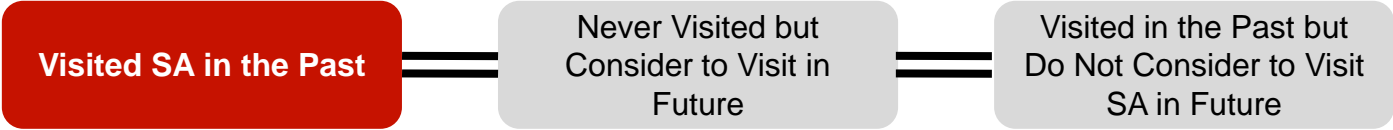


Note:

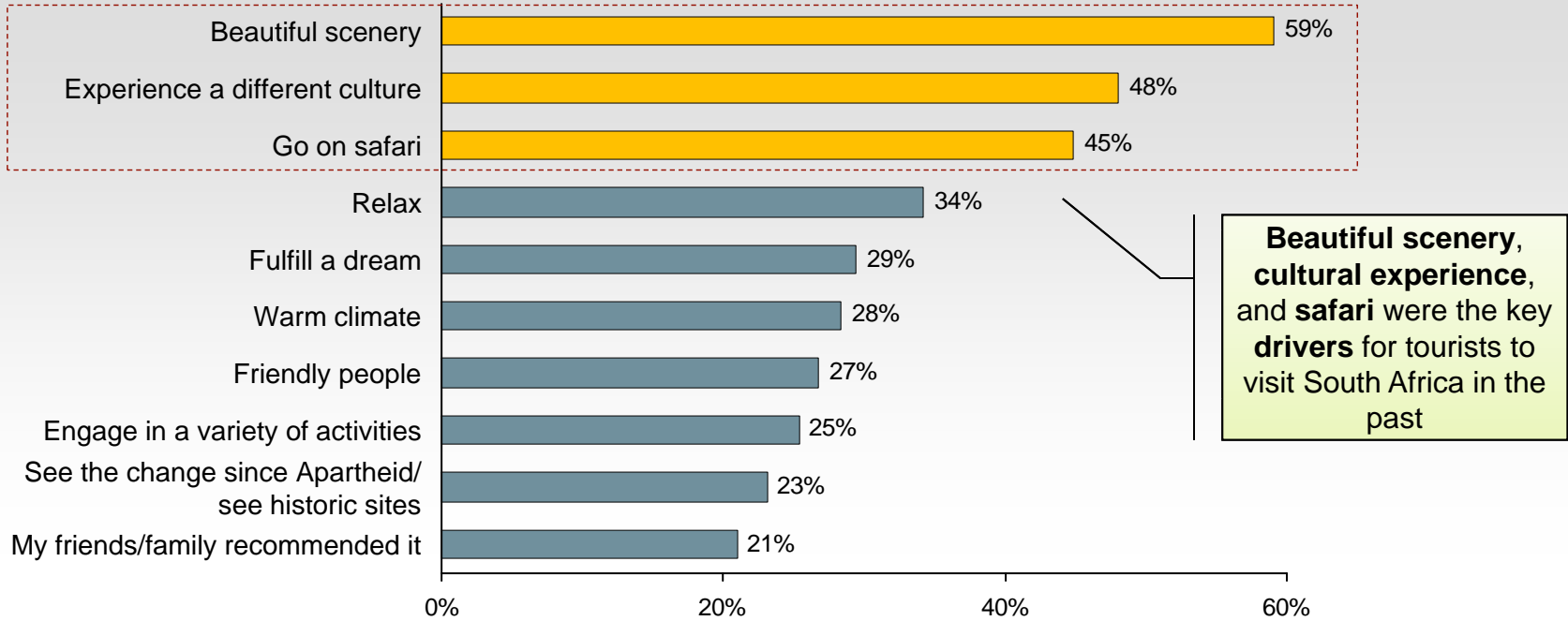
Core Markets weighted according to relative investment spend – Australia = 6%, France = 17%, Germany = 18%, India = 6%, Netherlands = 18%, UK = 18% & USA = 17%;
 Non core weighted according to – China = 32%, Italy = 43% and Japan = 25%; Global Average, according to investment spend: Core = 91%, Non core = 9%

Drivers to Visit SA in the Past

Based on Past Visitors to SA – Global Level



Top 10 Drivers to Visit SA in the Past, Global level, (n=606)



Approximately 15% of these past tourists went to see the 2010 FIFA™ World Cup live in South Africa

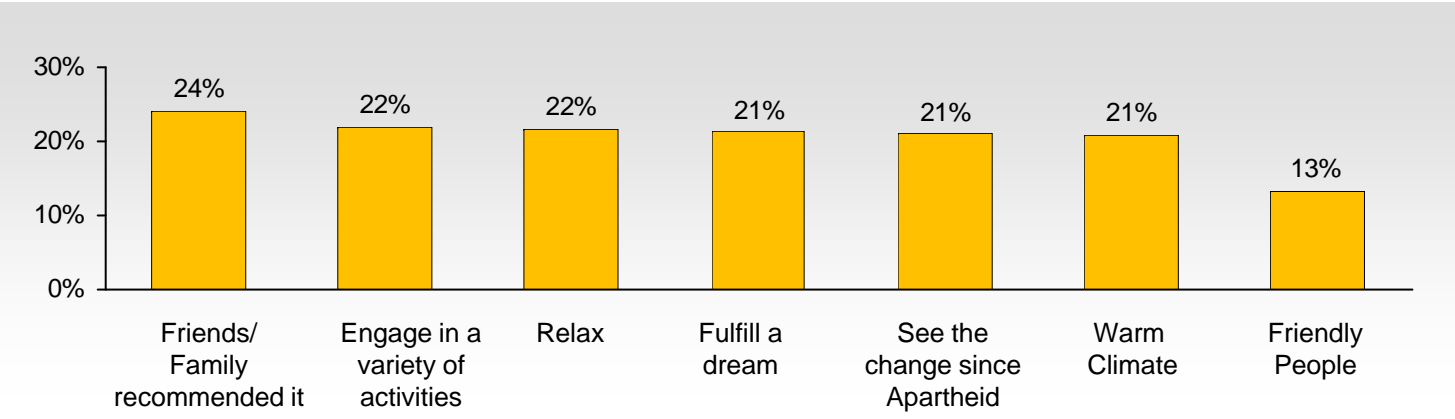
Drivers to Visit SA in the Future

Based on Tourists Who Have Never Visited SA – Global Level



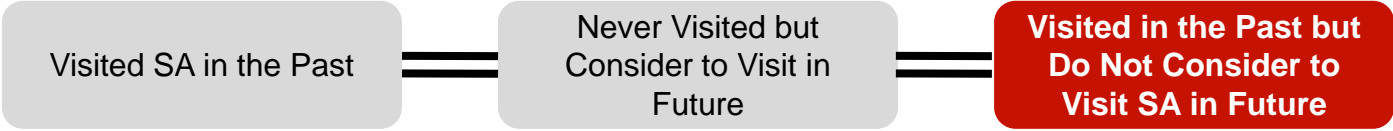
Beautiful Scenery, safari and cultural experience remain the **top three drivers** that attract the tourists to visit South Africa in the future as well

Other Drivers to Visit SA in the Future, (n=1,055)

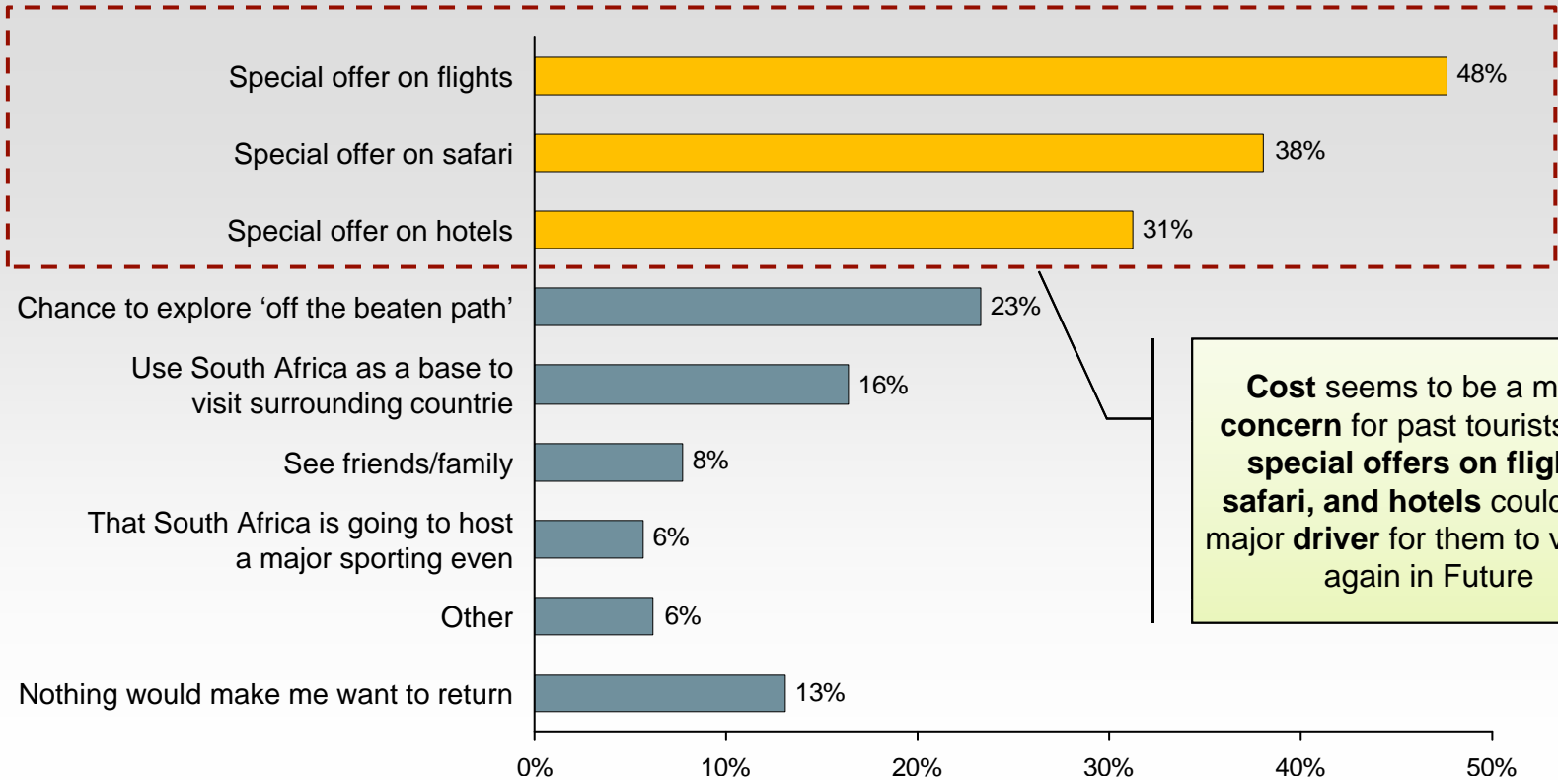


Drivers to Return SA in the Future

Based on Past Visitors to SA – Global Level



Drivers to Return SA in the Future (Based on Past Visitors who do not Consider to Visit SA in Future) – (n=1,670)



Cost seems to be a major concern for past tourists, and **special offers on flights, safari, and hotels** could be a major **driver** for them to visit SA again in Future

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