

A Comparison between the South African and International Visitor to Durban for the 2010 FIFA World Cup

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1. Introduction

The management of Tourism KwaZulu-Natal (TKZN) have decided to issue occasional papers to the tourism trade on the core findings of its research and other projects. The purpose of these papers is to stimulate more debate regarding the findings or progress of such projects, as well as to ensure wider awareness of key research findings.

There does not seem to have been much written on the subject of domestic tourists and mega-events. In relation to mega-events, there is some research on residents and their perceptions (Bob and Swart 2009), economic impacts (Kohler and Tifflin 2010), small enterprise development (Rogerson 2009), poverty (Pillay 2007), tourism displacement (Fourie, Krige and Spronk 2011) and crowding out (Preuss, H 2011).

How domestic tourists respond to mega-events is a question that is not regularly applied to the analysis of these events. Researchers are aware of the displacement factor as a result of a mega-event. However, very little or no research has been done on how domestic tourists respond to these events in terms of who they are, how much they spend, what activities do they participate in, their profile and what their travel and accommodation patterns are.

This purpose of this paper is to analyse the South African domestic tourists who attended the 2010 FIFA World (SWC) in terms of a number of areas such as visitor profile, behaviour and the like. The surveys that were conducted in Durban were used for the analysis. There were 969 respondents who were South African of the total of 2 858 respondents. The profile and behaviour of this group will be compared to the overall picture as reported in the 2010 FIFA World Cup Economic Impact report (Kohler and Tifflin: 2010).

2. Methodology

An economic impact study of the SWC held in South Africa was conducted for the duration of the event. Survey instruments similar to those used in Germany 2006 were used. The surveys were modified slightly to take the different South African host cities into consideration. Surveys were conducted in Durban, Port Elizabeth, Cape Town, Johannesburg and Pretoria (Kohler and Tifflin: 2010).

In Durban, the surveys were conducted in collaboration with the University of KwaZulu-Natal. The surveys were administered by trained fieldworkers using accepted interview techniques

and using the random sampling method. Some 3 000 surveys were targeted to be conducted. However, 2 858 surveys were eventually completed, 1 480 at the Moses Mabhida Stadium precinct, and 1 378 at the fan park precinct (Kohler and Tifflin: 2010).

Some fieldworkers were spread throughout the fan park area on every day of the event, and other fieldworkers were spread around the stadium precinct during each Durban match. They administered questionnaires before, during and after each match. The times of the interviews differed as the times of the matches differed, but in general, fieldworkers were in place at least two hours prior to a match, and remained for at least an hour afterwards. They attempted to complete their quota of questionnaires before the end of the match as it was found that quite a bit of drinking took place and the level of alcohol consumption amongst fans tended to preclude sensible answers towards the end of matches (ibid).

On non-Durban-match days, fieldworkers aimed to collect 50 questionnaires at the fan park. On most match days they were to collect 50 questionnaires at the fan park, plus 200 in the stadium precinct. The exception was that during the semi-final game in Durban, they were to collect 250 questionnaires in the stadium precinct and a further 75 in the fan park. It will be noted also that the total number of questionnaires for Cape Town and Johannesburg were similar to the Durban total, with somewhat fewer aiming to be collected in Pretoria and Port Elizabeth.

Once the questionnaires had been collected and checked for consistency and completeness, they were bundled carefully according to date and place, and the data were captured by university data capturers onto an SPSS statistical program. The data from the final three open-ended questions were captured by TKZN's data capturer into MSAccess. All of the SPSS data was then exported into an Excel spreadsheet and then into MSAccess for ease of analysis. Prior to the analyses, the data sets were again checked for correctness and reliability.

3. Visitor Profile Analysis

The graph in figure 1 shows that most of the domestic visitors during the SWC came from Gauteng and KZN. This is in line with the domestic tourism trend of visitors to KZN.

Figure 1: Province of Origin

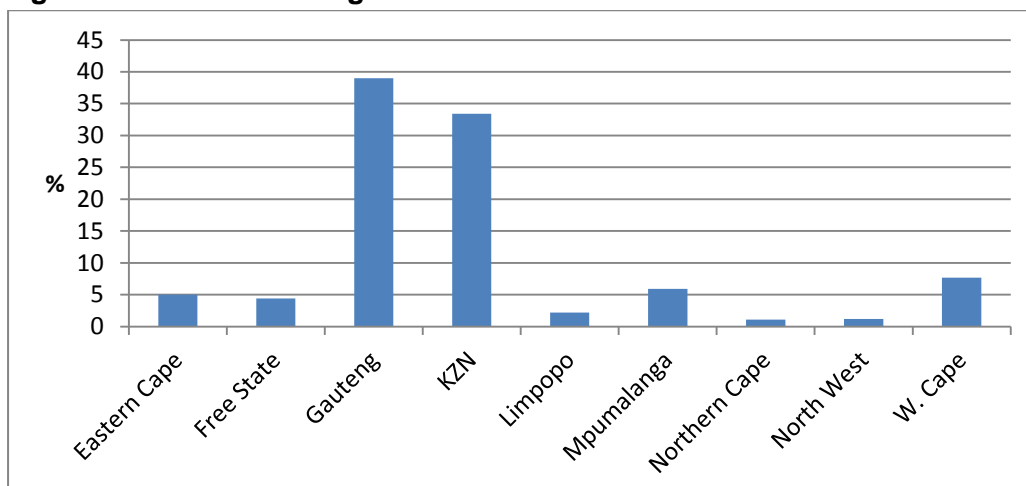


Table 1 below shows the percentage of visitors per age category, of the South African visitors. This is remarkably similar to those for all respondents. When comparing South African visitors with foreign visitors, there were slightly fewer South Africans in the 31-40 and 51-60 and +60 age categories and fewer foreign visitors in the 18-30 and 41-50 age categories. Most of the visitors to the SWC in Durban were between the ages of 18 and 40. Organisers and tourism practitioners in particular need to take note of this when marketing the event to potential visitors. The marketing channel, accommodation and activities offered also need to take the age group factor into consideration, when marketing to potential visitors or when organizing the event.

Table 1: Age

Age	SA	All	Foreign
18-30	41%	40%	39%
31-40	36%	36%	39%
41-50	17%	17%	14%
51-60	4%	6%	6%
60+	2%	1%	1%

Table 2: Gender

Gender	SA	All	Foreign
Female	36%	28%	23%
Male	64%	72%	77%

Table 2 above, indicates that there were more South African females who attended matches in Durban when compared to the number of foreign female attendees. With soccer being considered a male-dominant sport, the expectation would be that there would be more males attending the event. However, the higher number of South African females attending the event when compared to foreign visitors may be as a result of the SWC being seen as a once-in-a-lifetime opportunity by the South African female visitors.

Figure 2: Education

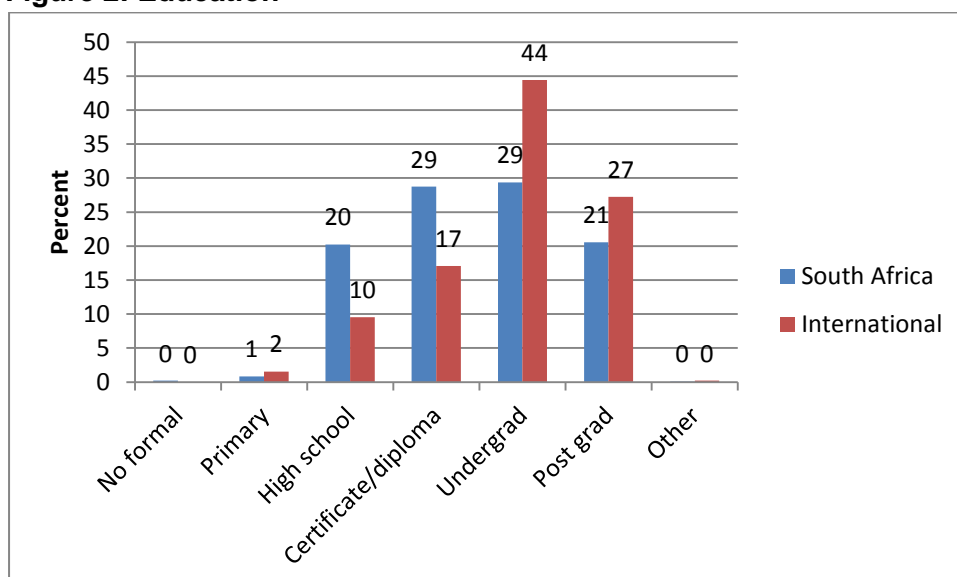
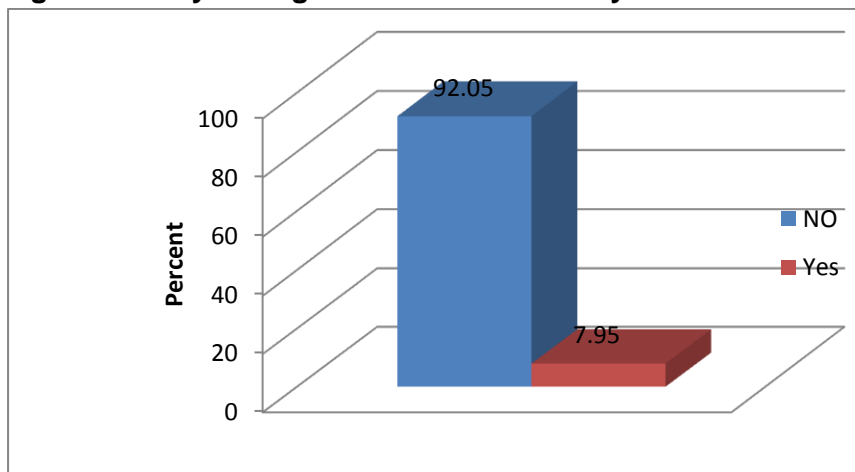


Figure 2 above indicates that the international visitors generally had a higher level of education than South African visitors. South African visitors' level of education is concentrated around high school and post school certificate and diploma levels, while international visitor's levels of education are concentrated around undergraduate and post graduate education. Access in terms of cost and places to higher level of education is easier in developed countries. In targeting visitors there needs to be awareness of their education levels as these are likely to have an impact on the marketing and advertising channels that will be used. This is likely because people with higher education levels tend to travel more.

Figure 3: Did you forgo a vacation or holiday to attend the SWC?



In figure 3, almost 8% of the South African respondents indicated that they did forgo a holiday to attend the SWC. The SWC is thus likely to could have replaced the winter holiday normally taken by these respondents.

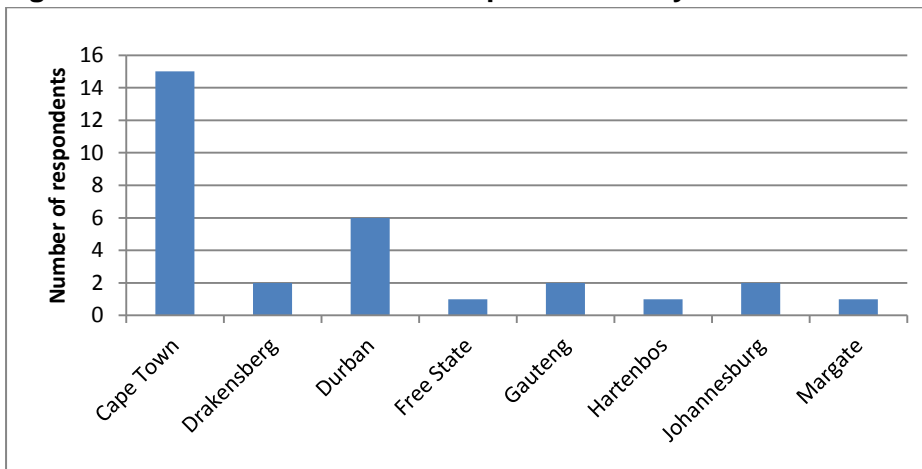
Table 3: If you did forgo a holiday, how much would you have spent?

Mean	R21 802.63
Count	76
Sum	1 657 000
Std Dev	20 120.48
SE Mean	2 307.978
95% CI (+/-)	4 597.727
Median	R15 000
Mode	R10 000

An average of R21 803 per person would have been spent on a holiday by 92% of the South Africa visitors who indicated that they did forgo a holiday to attend the SWC. Not all of this spend would have been lost to the economy due to the SWC. It is possible that this money would have been spent on various SWC-related expenses. Leakage would be a problem because a significant portion of money spent was on ticket sales, most of which went to FIFA. Some of these respondents would also have gone on international holidays but that money had now subsequently been spent in SA.

In figure 4 below, Cape Town was the preferred local destination of respondents who did forgo a holiday, followed by Durban.

Figure: 4 Local Destination of Postponed Holiday



When asked which international destination they would have visited, the USA was the destination preferred by the greatest number of respondents, as indicated in figure 5. Mozambique was the second highest preferred destination. This is an interesting point and would probably be popular among South Africa nationals.

Figure 5: International Destination of Postponed Holiday

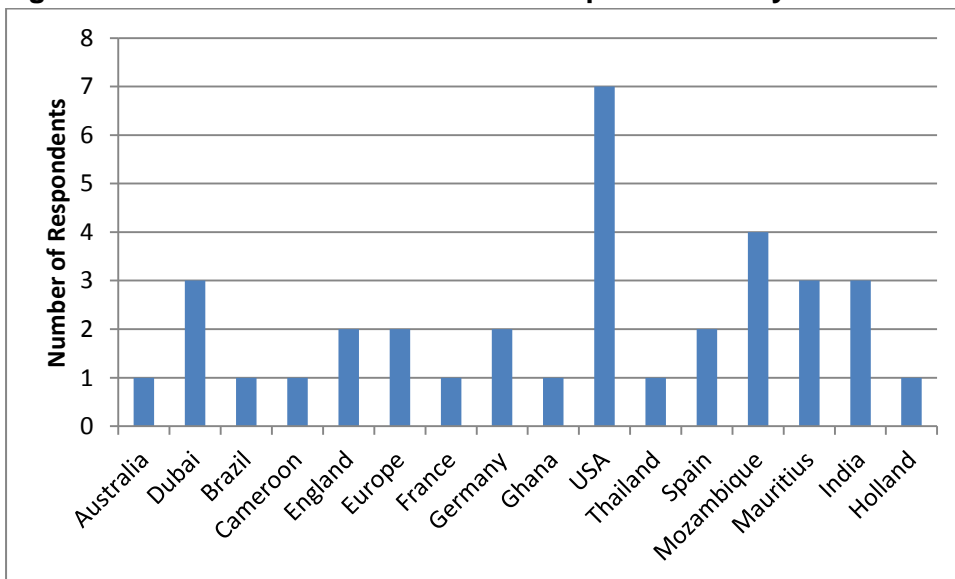


Table 4: Sources of Purchased Tickets

	SA	All	Foreign
Official channels	80%	79%	78%
Corporate	3%	3%	3%
Inclusive package	0%	5%	7%
Competition/free	3%	2%	2%
Other (friends/internet/family)	14%	11%	10%

Table 4 shows that many of the South African respondents did not purchase any packages for the SWC. Most of the respondents purchased their tickets from official sources. More South Africans visitors seemed to have acquired their tickets from friends, family or the internet. More international visitors purchased all inclusive packages, as it was easier to have accommodation and transport arrangements included in a package. By contrast, many South African respondents were more likely to have used their private vehicles to travel to matches and thus not needed transport. Travel by private vehicle of South Africans is a trend that has been noted by TKZN from the results of the impact assessments conducted of the various events held around the province. South Africans also tend to make their own accommodation arrangements rather than to book all inclusive packages.

Table 5: Tickets per City Purchased

City	South Africans	All
Bloemfontein	4%	9%
Cape Town	9%	26%
Durban	44%	77%
Johannesburg	30%	41%
Nelspruit	2%	7%
Port Elizabeth	4%	17%
Polokwane	1%	3%
Pretoria	4%	8%
Rustenberg	2%	13%

The distribution of tickets bought per city, in table 5 above, shows that most of the respondents who were interviewed in Durban had tickets for Durban matches. The table also indicates that many of these respondents also attended matches in Johannesburg. The high number of respondents who attended matches in Johannesburg was due to two stadia being located there and one in Pretoria which is 45 minutes away by car. These three locations hosted 21 of the 64 matches.

Table 6: How much will you be spending for the whole of the SWC?

	South Africa	Foreign
Tickets	R 2,199	R 7,169
Merchandise*	R 721	R 1,743
Shopping	R 1,159	R 3,423
Transport	R 1,853	R 11,956
Accommodation	R 1,701	R 11,860
Other	R 761	R 3,497

*Merchandise refers specifically to SWC related memorabilia, such as shirts, flags, scarves, etc.

On average the South African respondents spent considerably less than the international respondents for the duration of the SWC. More South African respondents probably stayed with friends and relatives or for a shorter period of time, thus their lower accommodation expenditure. South Africans' ticket spend was also lower because they attended fewer matches. The merchandise spend by South Africans was also lower probably because they spent money on merchandise prior to the event.

Table 7: For how many people is this expenditure?

South African	Foreign
1.97	1.35

In table 7, South African respondents were responsible for a larger group in terms of their spending, when compared to the foreign respondent. They spent on average less per person. This table indicates that South Africans probably travelled in larger groups. This makes sense in that long-haul trips are expensive therefore international visitors would travel in smaller groups.

The average spend per person for the whole SWC is indicated in the table below.

Table 8: Spend per person

South African	Foreign
R 2,968	R17,999

Although foreign visitors travelled in smaller groups, their average spend was much higher. Once again this spending included accommodation and transportation. South African visitors did not spend as much on these items due to their shorter length of stay and use of private vehicles.

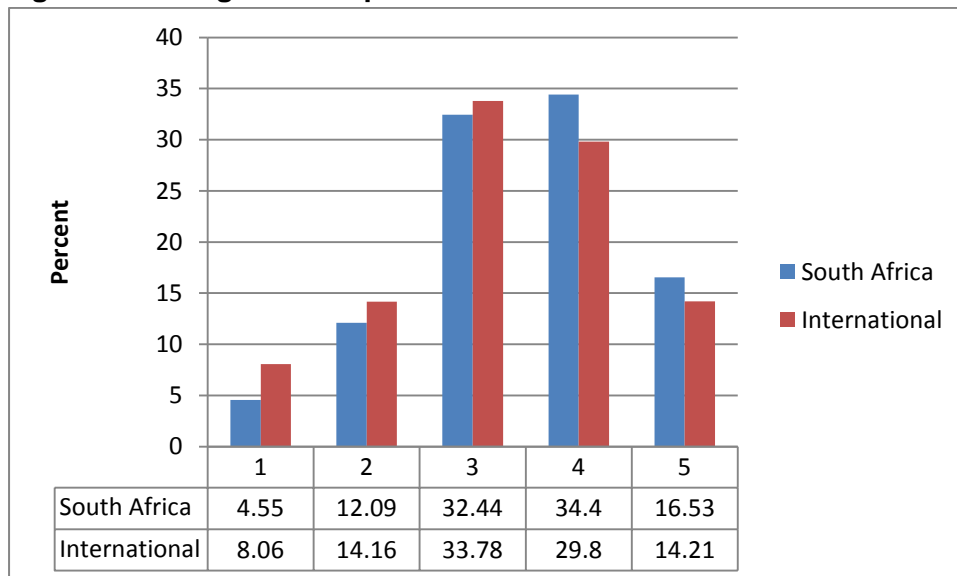
Table 9: How much will you spend in Durban today?

	South Africa	Foreign
Food	R271	R360
Tickets	R249	R587
Merchandise	R54	R94
Shopping	R140	R111
Transport	R82	R56
Accommodation	R223	R564
Other	R68	R119

The South African respondents anticipated spending more for shopping and transport on the particular day of the interview than the foreign respondents did. Transport for foreign visitors would be low because a large portion would have been included in their package costs or they stayed at hotels along the beachfront and walked to the match. However, the South African spending pattern for their whole visit did not indicate that they would spend more for shopping. One reason may be that South African visitors were more willing to spend because of the once-off opportunity of experiencing the SWC.

The spending patterns indicated in the graph below show the willingness of respondents to spend. The scale was from 1 – 5, 1= I only purchase what I really need and 5 = I purchase whatever I want.

Figure 6: Willingness to Spend



It seems as though the international visitors were more conservative than the South African visitors. This may be due to the fact that the South Africans realised that this event was a once-off experience for them. Many of them will not be able to attend another SWC, justifying their increased spending on this occasion.

Respondents were asked how many overnight stays they would you spend during the SWC in South Africa (foreign visitors) in total or in other host cities (domestic tourists) and in what type of accommodation. The table only shows the nights spent in Durban.

Table 10: Percentage of nights spent in accommodation by type

Accommodation Type	Nights Stayed		
	South African	All	Foreign
4-5 star hotel	4.49%	9.71%	12.34%
1-3 star hotel	8.15%	20.41%	26.55%
Guesthouse/B&B	12.84%	23.21%	28.38%
Car/camping	0.82%	6.29%	8.98%
Private room/flat/ house rental	6.32%	5.92%	5.69%
Private accommodation (friends/family)	44.46%	23.15%	12.49%
No. of day trips	22.73%	11.30%	5.58%

In table 10, more nights were spent by South Africans in private accommodation or they took day trips. More nights were spent in 1-3 star hotel and guesthouse or B&Bs by foreign visitors. When compared to South African visitors, more nights were spent in 4-5 star hotels by foreign visitors.

Table 11: Perceptions of the event

Respondents were asked for their level of agreement with a set of statements in order to gauge their perceptions of/around this event, and their results are depicted in table 11 below.

STATEMENT	Strongly Disagree		Disagree		Neutral		Agree		Strongly Agree	
	SA	For	SA	For	SA	For	SA	For	SA	For
I feel confident that this event has been successfully hosted in South Africa/Durban		0.2	0.2	0.3	3	4	29	38	68	57
I am satisfied with the level of service I have received during the event		0.3	2	1	8	5	39	47	51	46
I am more aware of tourism facilities in the area due to attending the event	1	0.8	14	10	21	13	36	49	28	31
The World Cup caused/is causing no traffic congestion in the local area	11	10	41	26	23	44	21	16	4	4
The World Cup leads/has led to increased crime in the local area	13	11	43	32	32	49	11	6	2	1
The World Cup increases pollution e.g. air pollution, waste etc	10	11	42	31	28	38	18	19	2	2
The World Cup has NO significant negative social impacts	12	12	31	28	26	34	23	21	8	5
Only answer the following question if you are a South African: I feel proud that South Africa is hosting this event.	0.3				5		11		84	
Only answer the following questions if you are a foreigner: I am more aware of other destinations in South Africa because of visiting the event		4		6		9		39		41
I think South African <i>athletes or teams</i> are major competitors in <i>this sport</i> .	7	7	13	17	29	26	36	39	15	10
I am more aware of other destinations in the rest of Africa because of visiting the event	11	6	25	19	33	22	25	38	6	15
The environment in Durban is being degraded due to the hosting of the 2010 FIFA World Cup™	20	18	42	40	24	29	11	11	3	3
During the 2010 FIFA World Cup™, I go out of my way to purchase goods and services from local businesses	5	1	15	9	29	25	37	50	15	15

The responses indicated that:

- Both South African and foreign visitors strongly agreed that South Africa hosted the SWC successfully.
- Both sets of respondents agreed or strongly agree that they were satisfied with the levels of service they had received during the event.
- They also agreed that they were more aware of tourist facilities due to their attendance at the event.
- More South Africans than foreign visitors believed that the SWC caused some traffic congestion. Foreign visitor remained largely neutral.
- Again, South Africans disagreed that the SWC led to increased crime levels, whereas foreign respondents were generally neutral.

- The South African respondents disagreed that the SWC increased pollution while the foreign respondents remained neutral.
- Also, most the South African respondents felt that the SWC had some negative social impacts, while the foreign respondents remained neutral.

Generally, the foreign respondents seemed to be non-committal in their responses to the statements about the social impacts of the SWC. They remained neutral for the most part. This may be as a result of them not being in the country for a long enough time to agree or disagree with these statements. It could also be as a result of the very low incidents of crime during the SWC, or South Africans are just more sensitive to these issues.

- The majority of South Africans interviewed indicated that they were proud that South Africa has hosted the SWC. International visitors agreed or strongly agreed that they were more aware of other destinations in South Africa due to the SWC.
- Most South Africans and international visitors agreed that South African teams were strong competitors in football/soccer.
- More international visitors agreed that they were more aware of other African destinations, whereas more South African visitors remained neutral.
- Both the international and South African respondents disagreed that the environment was being degraded due to the SWC.
- About 50% of the international respondents went out of their way to purchase goods and services from local businesses. The majority of South African respondents did the same.

The responses with regards to table 12 highlighted a few issues.

1. The respondents indicated that the SWC was hosted successfully. Also, Durban being a host city contributed to the success of the SWC. This has shown that South Africa has the ability to host mega-events.

2. The respondents also agreed that the event exposed them to more tourist facilities. The realisation is that these events have the ability of doing just that. Destinations need to capitalise on these events to gain maximum exposure for their attractions and facilities.

3. Respondents did not agree that the crime levels increased as was suggested when the event was awarded to South Africa. This safe environment added to the success of the event and the visitor's experience. Visitor experience is a crucial element of a destination's competitiveness. Thus South Africa and Durban in particular need continued investment in security as Durban is a major tourism destination.

4. Visitors seemed to be aware of the impacts of an event other than economic ones. These impacts include social, pollution and traffic congestion. They felt that the SWC did have some negative social impacts and it contributed to traffic congestion. Thus host cities of future mega-events need to be aware of how these impacts affect the experience of the visitor.

5. Many respondents indicated that they sought and bought locally produced goods. This is an opportunity for host cities to ensure that locally produced goods are showcased at these events. It may be good to have a venue where only locally made goods are sold during these events.

Table 12: Activities

Activities	South Africa		Foreign	
	No.	%	No.	%
Shopping	525	17.5	1130	13.9
Wildlife	49	1.6	700	8.6
Trading	10	0.3	28	0.3
Natural Attractions	143	4.8	696	8.5
Medical	6	0.2	7	0.1
Nightlife	163	5.4	995	12.2
Theme Parks	172	5.7	428	5.3
Casino	254	8.4	474	5.8
Business	51	1.7	48	0.6
Social	262	8.7	123	1.5
Beach	795	26.4	1419	17.4
Health	10	0.3	9	0.1
Culture	58	1.9	453	5.6
Sport competitor	66	2.2	287	3.5
Food and Wine	339	11.3	1002	12.3
Attend sports event	18	0.6	45	0.6
Adventure	77	2.6	297	3.6
Other	8	0.3	-	-
Total	3006		8141	

Table 12 provides a list of the activities of the South African and international visitors to Durban during the period of the SWC. Both international and South African visitors participated in similar activities, such as shopping, the beach and food and wine. As is the trend, most of the South African respondents participated in beach activities. More of the international visitors participated in nightlife activities when compared to South African visitors. More international visitors also visited natural attractions than their South African counterparts. South Africans however, visited the casino and social activities more than the international visitors.

4. Conclusions and Recommendations

The paper has shown the differences in behaviour between the international and domestic visitors to Durban for the SWC. The differences are highlighted below. South African visitors to Durban predominantly came from Gauteng and KZN. These are Durban's traditional domestic source markets.

When comparing the age groups of the local with international visitors, the bulk of visitors were in the 18-40 age categories. In future events of this nature it is important to consider that most visitors are less than 40 years of age. Therefore the activities and experiences that are made available should cater for a younger and more active group of people. Generally there were fewer women than men, but more South African females visited Durban than international females. This is understandable because of the shorter distances travelled and time spent in Durban by South African visitors.

Due to South Africans spending a shorter time in Durban, activities and experiences for these shorter periods need to be advertised.

The education levels of the international visitors were generally higher than that of their South African counterparts. This could be due to many of the international visitors being from more developed countries where higher levels of education are the norm. Also, it is often the case that levels of education results in higher income levels, often permitting a greater amount of travel, such as the SWC.

Most South African visitors would have visited Cape Town domestically and the USA internationally had the SWC not been held in South Africa. Locally, Durban was the next popular choice. Internationally, Mozambique, Dubai, Mauritius and India were also popular choices.

More South African's (14%) purchased tickets from friends, relatives or on the internet, compared with 10% of international visitors.

South Africans travelled in larger groups than international visitors. When asked how many people their expenditure was for, South African responses were almost 2 (1.97) people and the international visitors were 1.35 people.

On the particular day of the interview South African respondents spent more on transport and shopping than international visitors. This may be explained by the fact that the international visitors probably had the costs of their transfers between their accommodation establishments and the stadia included in their packages. Whereas the South African respondents who mostly used private vehicles paid for petrol while they were in Durban or used public transport facilities.

The SWC is a mega-event that many people, especially South Africans, will only experience once. This seems to have an impact on their behaviour with regards to spending as it was noted that on average South Africans had a higher willingness to spend when compared to international visitors. In addition, South African visitors generally, spent less than their international counterparts. This was due to shorter length of stay for the South Africans versus the long haul costs for the international visitors.

The SWC seemed to expose South Africans and international visitors to other tourism attractions and activities that KZN has to offer. Both groups of visitors were satisfied with the levels of service experienced in Durban during the SWC.

Overall South Africans will make a special effort to attend and experience a mega event held in South Africa. They will forgo a holiday elsewhere to experience the event. South Africans will participate in similar activities that they would normally do when on holiday, when attending mega-events. If another such event is held in South Africa, many more South Africans will endeavour to attend and experience the event. South Africans did not know what to really expect from the 2010 SWC. Therefore many left their ticket purchases until the last minute or did not purchase tickets for the matches.

A long haul destination for a mega-event will not necessarily attract the large numbers that a European destination would because of the cost of flights is higher to a long haul destination. Also, it makes sense to stay longer in a long haul destination which increases the accommodation, meals and activity costs. Destination in Europe for Europeans are considered short haul where visitors can ideally stay a weekend. Therefore local support for such an event is therefore crucial. Packages catering especially for local residents need to be created to encourage them to stay longer and to experience more of what the destination has to offer. Their experiences at such an event could result in them returning at another time.

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