



2010 FIFA World Cup South Africa™

Mobile Survey on Public Perception of South Africa – Pre & Post World Cup

October 2010

Study Objectives

Our longitudinal coverage of South Africa hosting the World Cup is intended to showcase the impact global events such as the World Cup can have on brand perceptions as well as highlight the use of new, more effective platforms to collect and analyze information

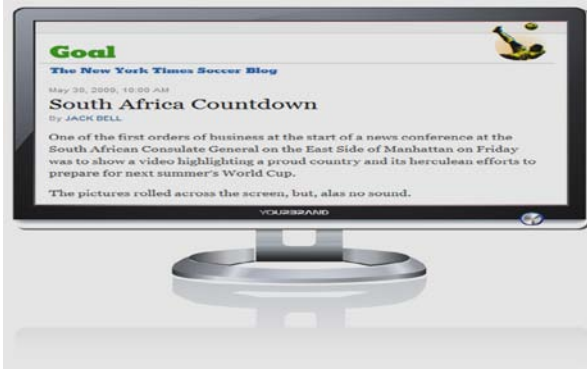
Objectives of this Report

- 1** Analyze change in opinions regarding South Africa as the destination brand for hosting the World Cup – pre and post the event
- 2** Determine the impact of the World Cup on South Africa, by identifying the key drivers and barriers for traveling to the event
- 3** Determine the most memorable aspects of the matches and key expectations from the 2014 World Cup
- 4** Assess the brand impact for companies that sponsored the 2010 FIFA World Cup
- 5** Showcase the effectiveness of using platforms such as social media and mobile to systematically collect and analyze information
- 6** Identify consumer segments that can be reached using these more effective channels for research rather than web-based surveys



Grail Research's Coverage of the 2010 FIFA World Cup

Grail Research followed South Africa's preparation for the 2010 FIFA World Cup since March 2009, and has evaluated the change in global perceptions about South Africa as the host nation via online social media analysis and mobile surveys pre and post the event in June/July 2010



 The 2010 FIFA World Cup

★ Mar' 09

★ Mar' 10

★ Jun' 10



★ Jul' 10

Online Media Analysis

- Conducted an analysis of global perceptions and commentary expressed online about South Africa hosting the 2010 World Cup
- Identified key issues facing the country and developed case examples of how other countries managed public perception surrounding similar global events

Online Media Analysis

- Refreshed the online media analysis and compared with Mar 2009 findings to understand how global perceptions about South Africa changed over the past year
- Summarized actions taken by South Africa to address key concerns and prepare to host the event

Mobile Survey

- Conducted a mobile survey in South Africa, Brazil, Germany, China, the US, and the UK just before the 2010 World Cup, and a second survey after the completion of the event
- Combined the findings of the mobile survey with our earlier online media analyses in order to provide a more in-depth look at how the 2010 FIFA World Cup impacted global perception of South Africa

Note: [Link to report - Online Media Analysis, Mar 2009](#); [Link to report - Online Media Refresh, Mar 2010](#)

2010 FIFA World Cup South Africa

Key Takeaways



Public Perception of South Africa Improved

- Perceptions of South Africa hosting the World Cup have improved gradually; we observed a positive shift post the event

South Africa's Infrastructure Gained Positive Views

- Prior to the World Cup, there were concerns whether South Africa was prepared to host the event. However, post the games many people felt the country had a strong infrastructure in place

Tourism Emerged as Key Attraction

- South Africa's scenic beauty, tourist attractions, and friendliness of locals stood out as the key attractions beyond the World Cup itself

Safety and Security Loom as Primary Concerns

- Safety and security were the key concerns for visitors before the World Cup and did not improve post the event. People from the UK and China had the highest level of concern

Unexpected Performances are 2010 World Cup's Key Reminiscences

- Apart from the Vuvuzelas, the most memorable aspects of the 2010 World Cup were the early exits of top-ranked teams and Spain's first World Cup win

Use of Technology is a Key Expectation for 2014

- Besides looking forward to a fun-filled environment in Brazil, soccer fans are expecting technology to play a key role in assisting referees during the 2014 World Cup

FIFA Partners Successfully Leveraged the Sports Platform

- Using mobile surveys we also found that FIFA partners (e.g., Coca-Cola, Adidas, and Visa) received more brand leverage than FIFA sponsors (e.g., Emirates and Budweiser)

Certain Demographic Segments were Key Drivers of Perception

- Certain segments, such as young soccer fans and men the age group of 26–45 years, emerged with strong points of view in regards to the 2010 World Cup, driving the changes in perceptions

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 - FIFA World Cup – the Event
 - Brand Perception
 - Emerging and Influential Segments

Our Approach: Mobile Survey

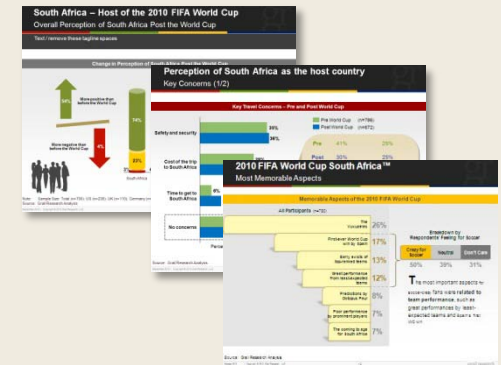
Design



Field Mobile Survey



Analyze and Consolidate Observations



- Designed surveys to assess the views of soccer (football) followers across six countries
- Included 10 –13 questions covering demographics as well as questions like, *'What is your primary concern about visiting South Africa,'* and *'Has your opinion changed about South Africa after the World Cup'* – These questions were designed to gauge the global perception of South Africa

- Executed the pre and post World Cup surveys in May-June and July-August, respectively
- Conducted the survey in six soccer-playing countries, across different continents
- Partnered with a mobile services company that had access to mobile users in our target countries

- Analyzed responses to determine change in perception pre and post the World Cup
- Compared results from mobile surveys with our earlier observations from online media research
- Examined results to find interesting trends related to respondents' age, gender, feelings for soccer and country of residence

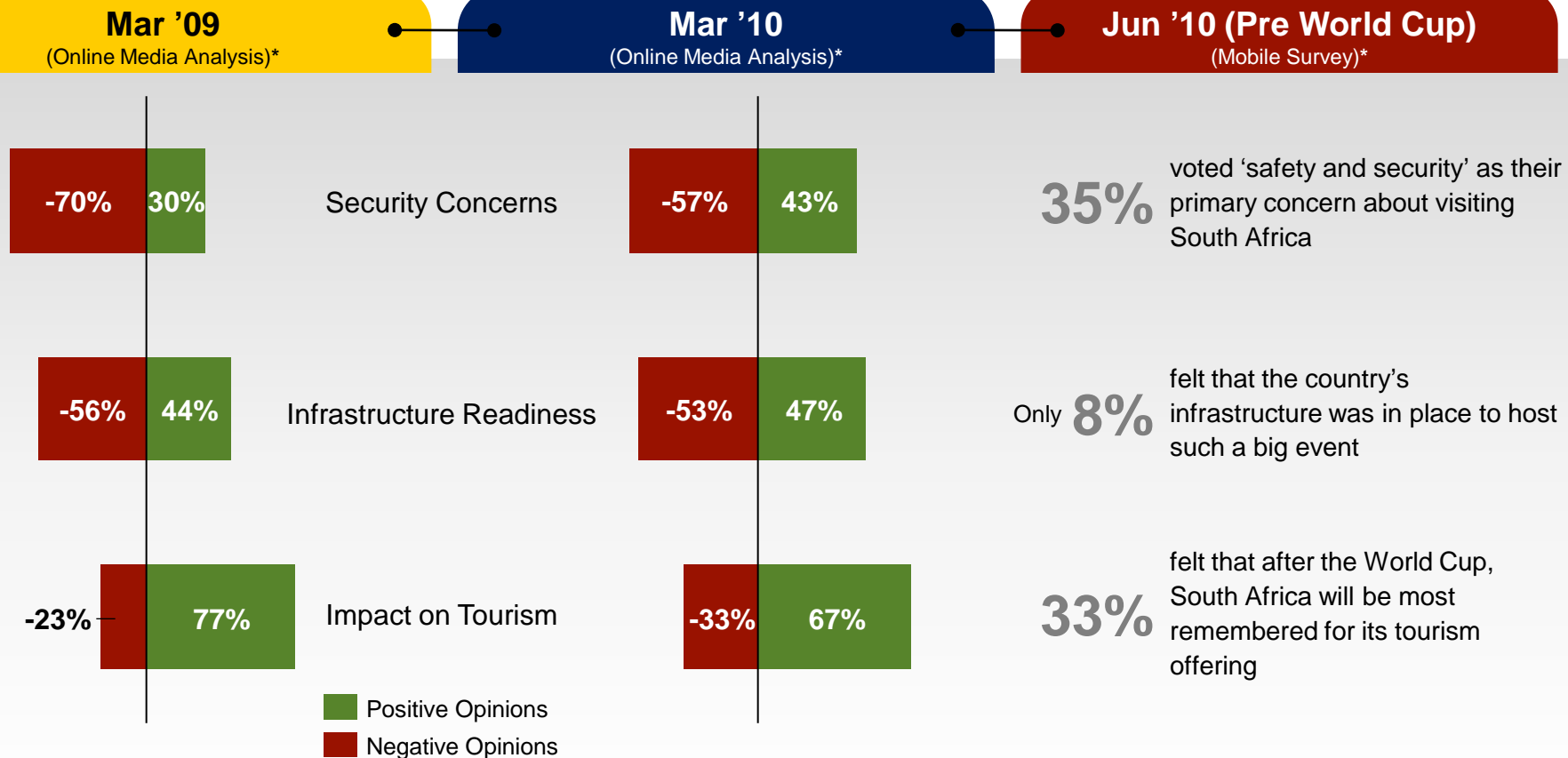
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South Africa – Host of the 2010 FIFA World Cup

Global Perception Prior to the World Cup

Comparison of the results from Mar'09 to Jun'10, we observed that public perception of South Africa as the host of the 2010 World Cup had three primary themes – concerns around safety and security, lack of infrastructure readiness and the event's positive impact on tourism



Note: * The data for Mar'09 and Mar'10 is from our online media analysis, and that for Jun'10 is from our mobile survey. These percentage numbers are not directly comparable, and are shown here to highlight the key themes in public perception before the 2010 World Cup

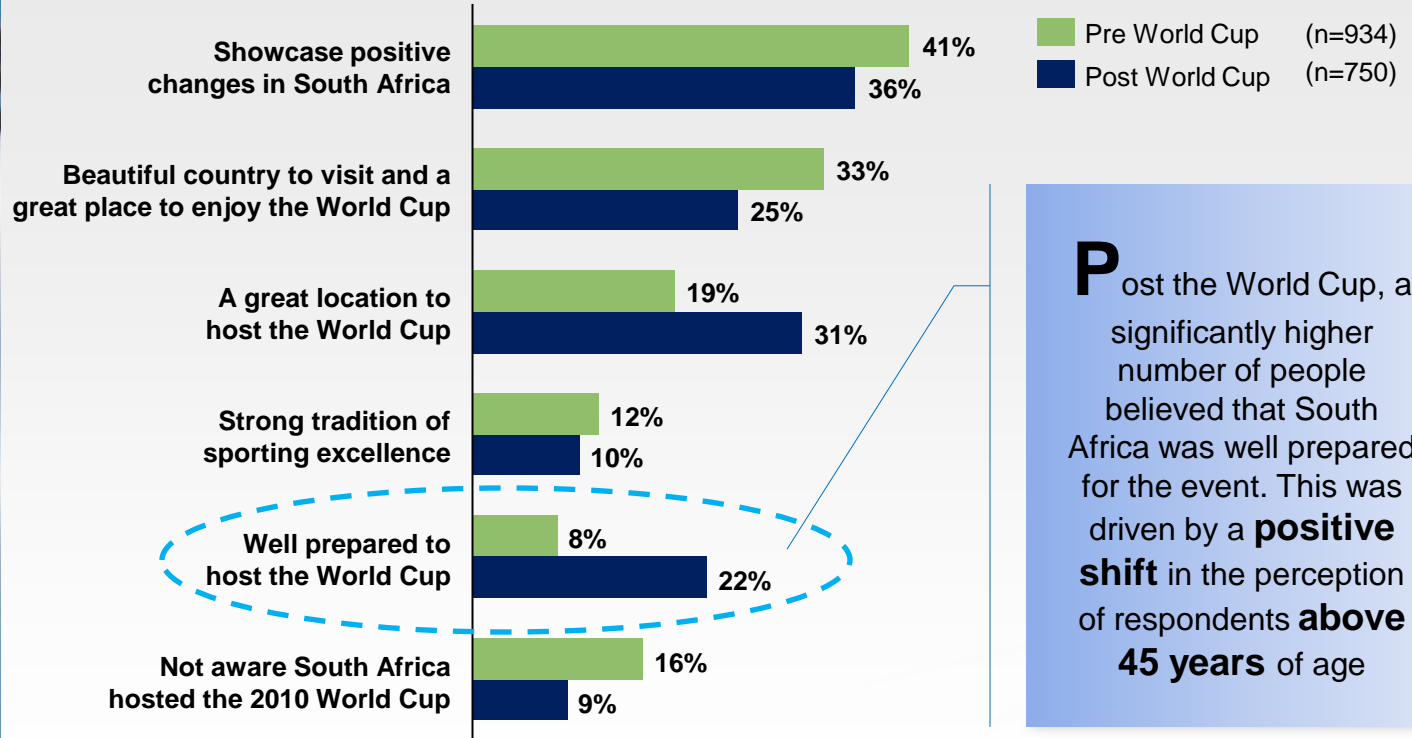
Source: Grail Research Analysis

South Africa – Host of the 2010 FIFA World Cup

Global Perception Post the World Cup

After the World Cup, public perception of South Africa improved on several parameters...

Perception of South Africa as the host for 2010 World Cup



Post the World Cup, a significantly higher number of people believed that South Africa was well prepared for the event. This was driven by a **positive shift** in the perception of respondents **above 45 years** of age

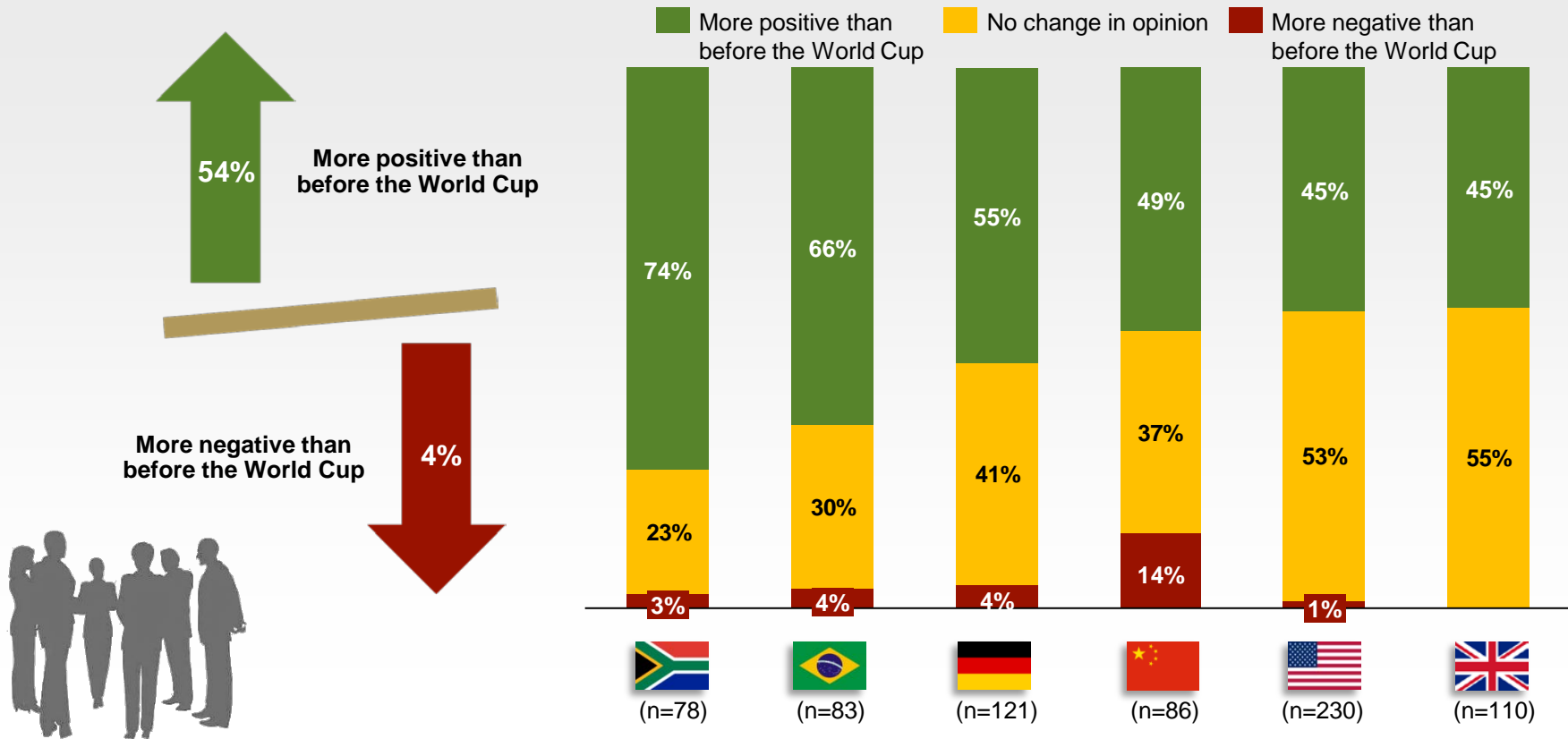
“ This is the way a World Cup should be. It has been amazing here and we hope Brazil can do the same as South Africa and host a great World Cup. I've told all my friends back in Brazil that Africa is living la vida loca – a Brazilian fan ”

South Africa – Host of the 2010 FIFA World Cup

Change in Perception Pre and Post World Cup

...and the majority of the respondents felt more positive about South Africa than before the World Cup

Change in Perception of South Africa Post the World Cup



Amongst all countries surveyed besides South Africa, **Brazilians felt the most positive about South Africa** after the World Cup

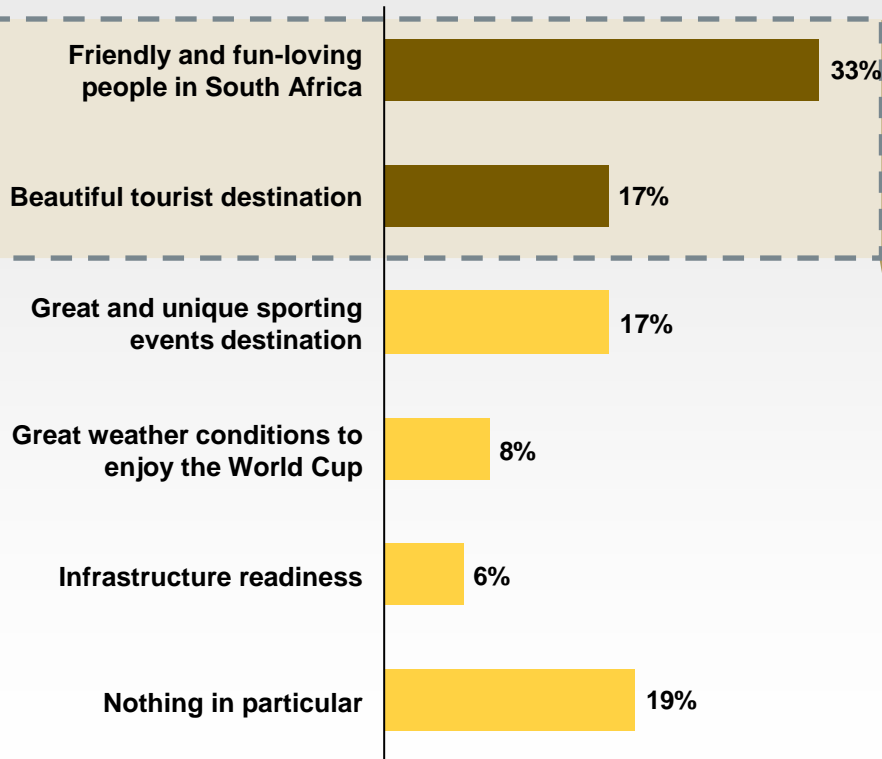
Perception of South Africa as the Host Country

Memorable Aspects of South Africa

Most respondents said they will remember South Africa for its friendly residents and scenic beauty...

Most Memorable Aspects of South Africa

All Participants (n = 750)



“ South Africans have welcomed us all over. It is an incredible country. The atmosphere is fantastic, **the landscape is beautiful and people are really friendly**. South Africa is on the right path to become a greater country ”
– a Spanish soccer fan

“ I had a fantastic trip, and what stood out for me was the **friendliness of the people**. No matter the circumstance there was always a South African ready with a smile and eager to assist. I have never been to such a friendly, open country ”
– a Journalist from the UK

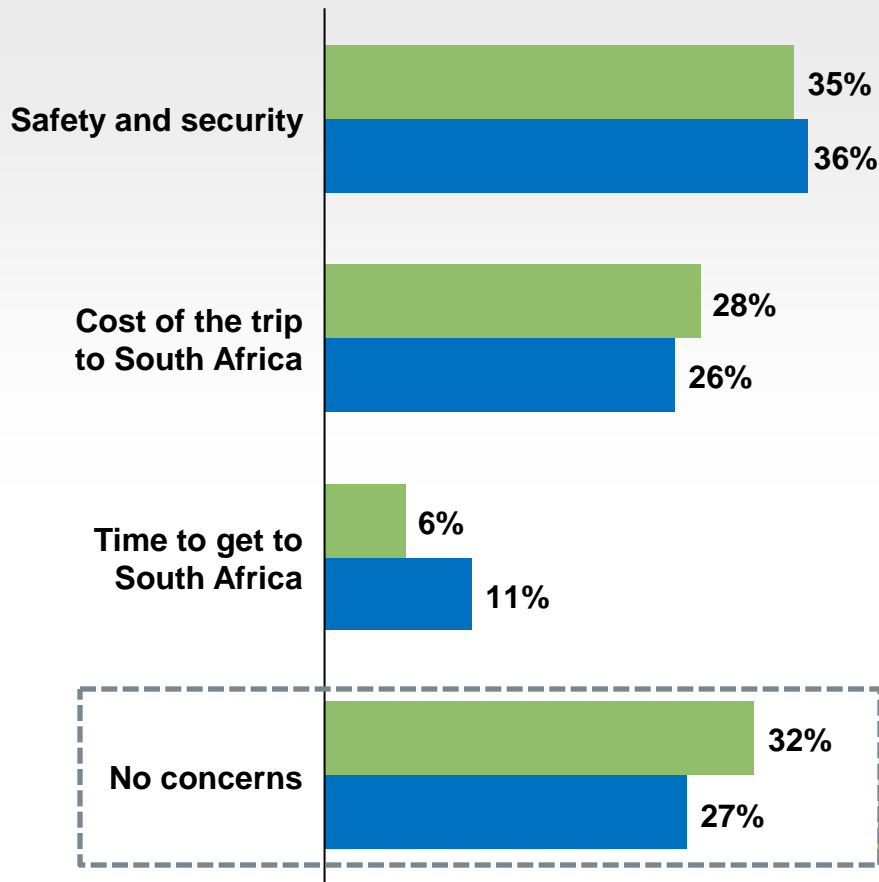
When asked about the most memorable aspect of South Africa, **50% of respondents voted for aspects related to tourism**, including the friendliness of South Africans

Perception of South Africa as the Host Country

Key Concerns (1/2)

Although not the only travel concern, safety and security remains the highest both pre and post World Cup...

Key Travel Concerns – Pre and Post World Cup



Pre World Cup (n=786¹)
Post World Cup (n=672¹)

Pre 41%

25%

Post 30%

25%



Female



Male

Female respondents had **less concerns** related to security and travel as compared to male respondents (pre and post the World Cup)

Note: ¹Excluding responses from South Africans; ²Male to Female ratio ~60:40

Source: Grail Research Analysis

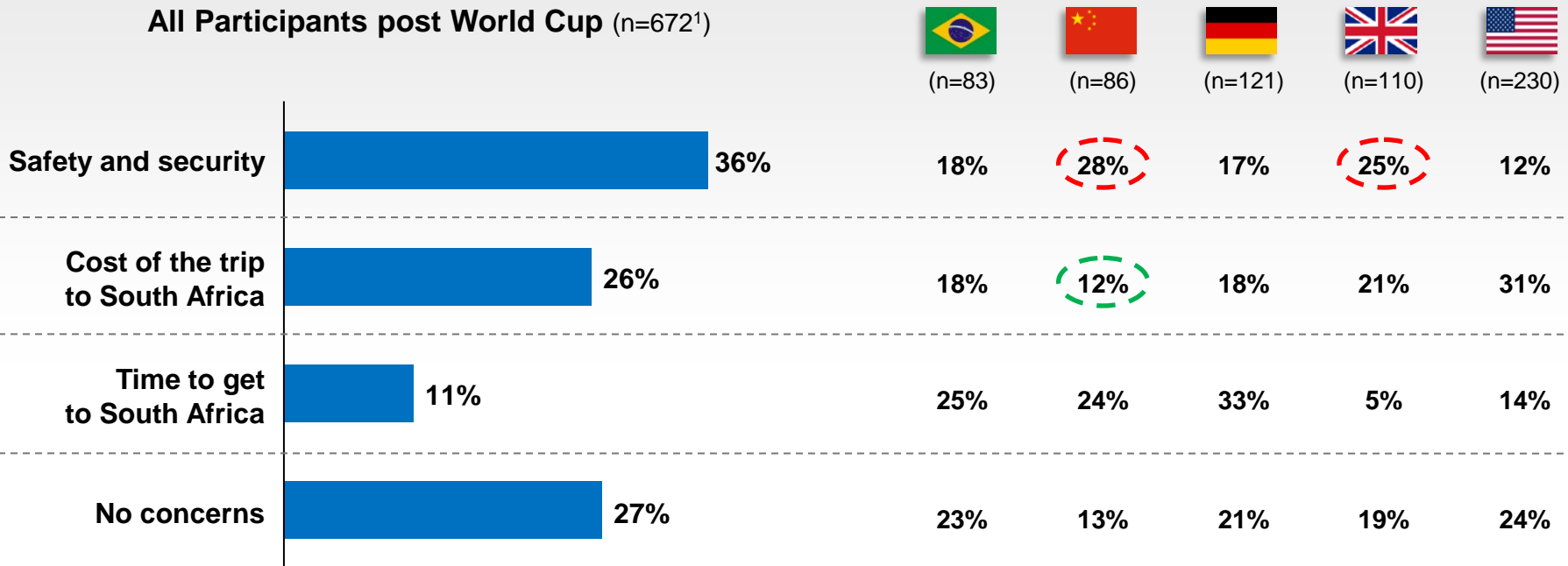
Perception of South Africa as the host country

Key Concerns (2/2)

...and respondents from certain countries were more concerned than others

Key Travel Concerns – Post World Cup

All Participants post World Cup (n=672¹)



Safety and security concerns voiced by respondents from **China** and the **UK** were relatively **higher** as compared to other countries. The **Chinese** were the **least concerned** about the **cost** of travel

Note: ¹Excluding responses from South Africans

Source: Grail Research Analysis

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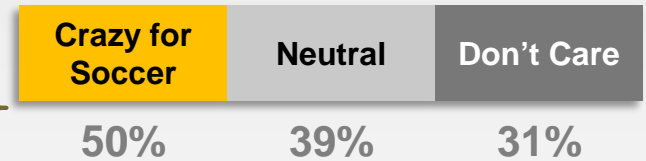
Most Memorable Aspects

Memorable Aspects of the 2010 FIFA World Cup

All Participants (n=750)



Breakdown by Respondents' Feeling for Soccer



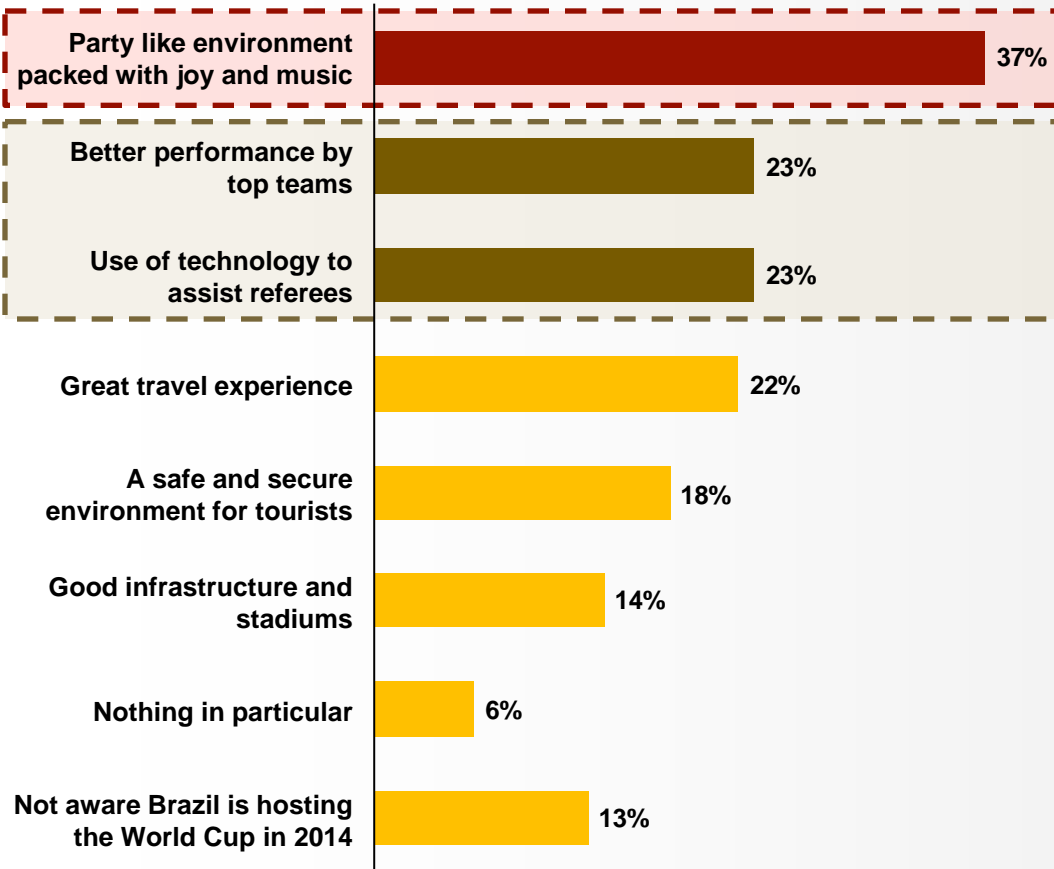
The most important aspects for soccer-crazy fans were **related to team performance**, such as the great performances by least-expected teams and Spain's first World Cup win

2014 FIFA World Cup Brazil™

Key Expectations

Expectations from the 2014 FIFA World Cup Brazil™

All Participants (n=750)



It is no surprise that a **party-environment is the most anticipated highlight** of the 2014 World Cup across all respondents

Given the incidents of disputed goals during the 2010 World Cup, it is evident that respondents **expect the use of technology to assist referees in 2014**

Soccer fans have higher expectations from factors that are directly related to the event as compared to other respondents

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2010 FIFA World Cup South Africa™

Key Sponsors vs. Most Associated Brands

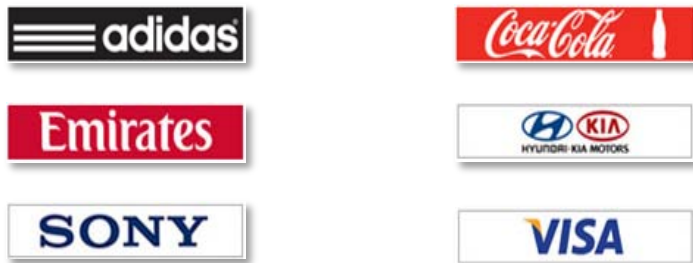
Coca-Cola seems to have gained the highest 'brand ROI' by leveraging their FIFA partnership; sponsors such as Emirates and Budweiser, who invested a significant amount, did not get equivalent returns

Key Sponsors of the 2010 World Cup

Most Associated Brands with the 2010 World Cup

Market Affiliates

FIFA PARTNERS



FIFA WORLD CUP™ Sponsors



All Participants (n=748)

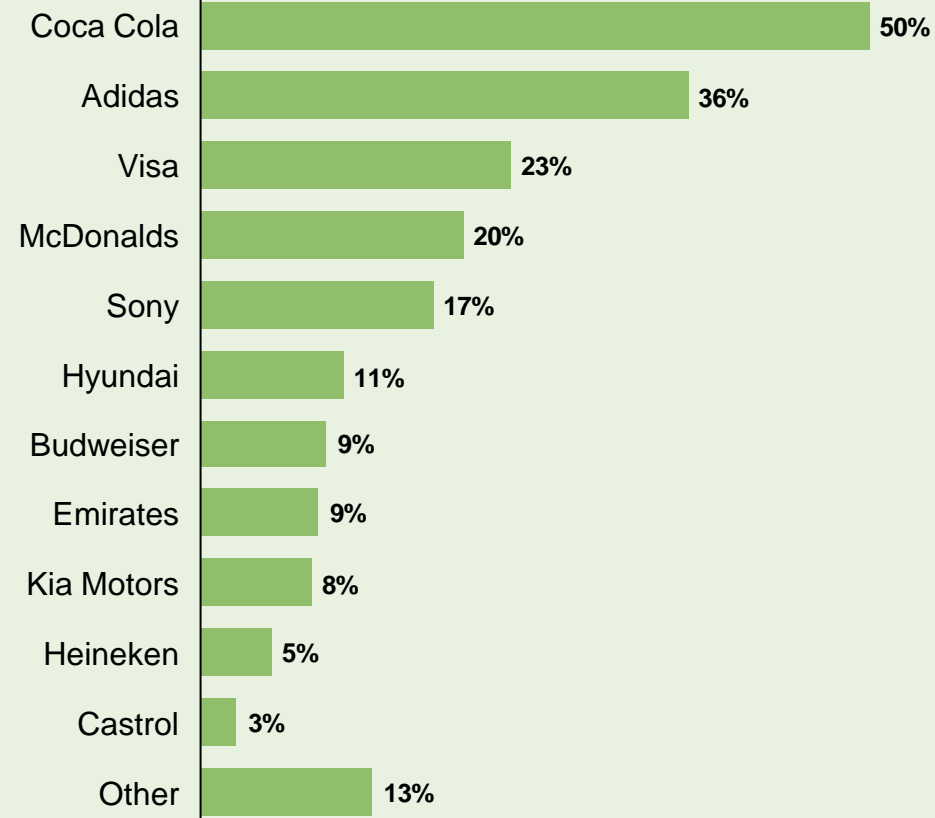


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Emerging and Influential Segments

We identified two specific segments across the six countries that can be effectively targeted using new platforms such as mobile surveys

Young Soccer Crazy Fans (11%)

- This segment refers to respondents less than 25 years old who claim to be crazy about soccer. The average age in this segment is **19 years**, the majority being residents of **Germany** and **Brazil**
- This segment tended to appreciate South Africa as a great location to host the World Cup, even though more than 80% followed the event on TV
- These young soccer-crazy fans had positive views on most dimensions surveyed – including high appreciation for the country's tourism offerings and greater brand recall than other respondents



Men in the Age Group of 26–45 yrs (28%)

- Of our surveyed population, 28% were men between 26 and 45 years of age. The average age of this segment is **34 years** representing all countries surveyed equally
- More than 80% of this segment watched the World Cup on TV
- This segment was the most appreciative of positive changes in South Africa showcased by this event. Also, their brand recall for automobile brands was higher than other respondents





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