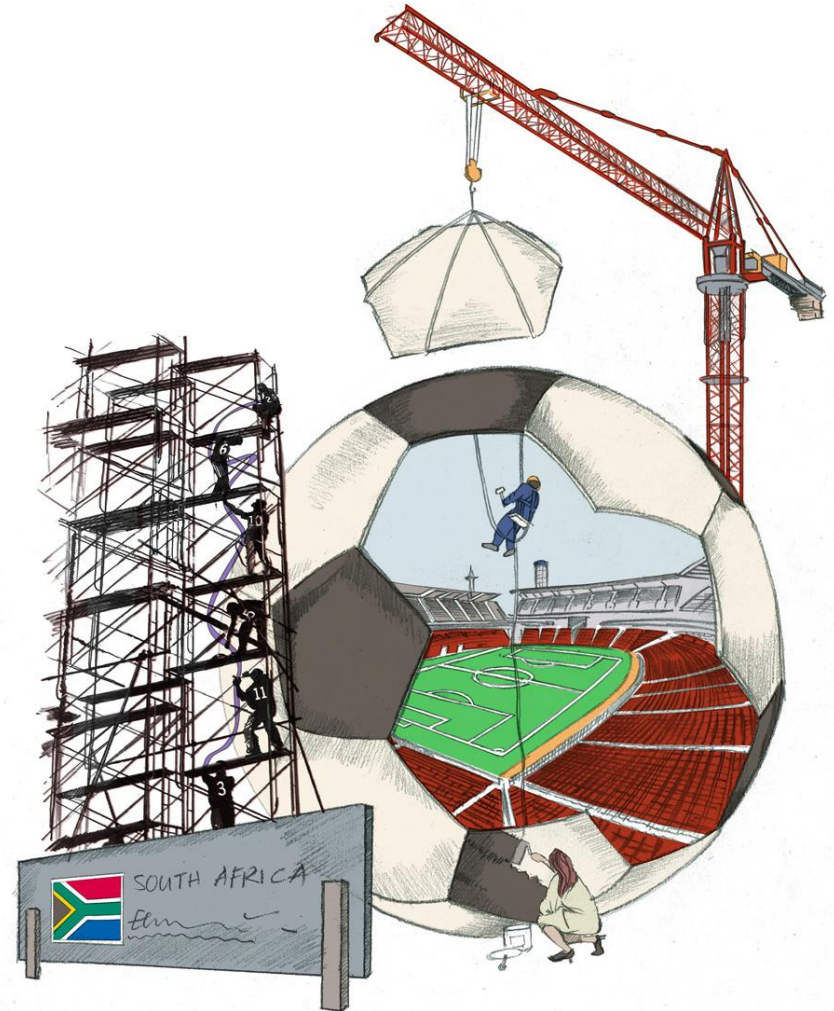
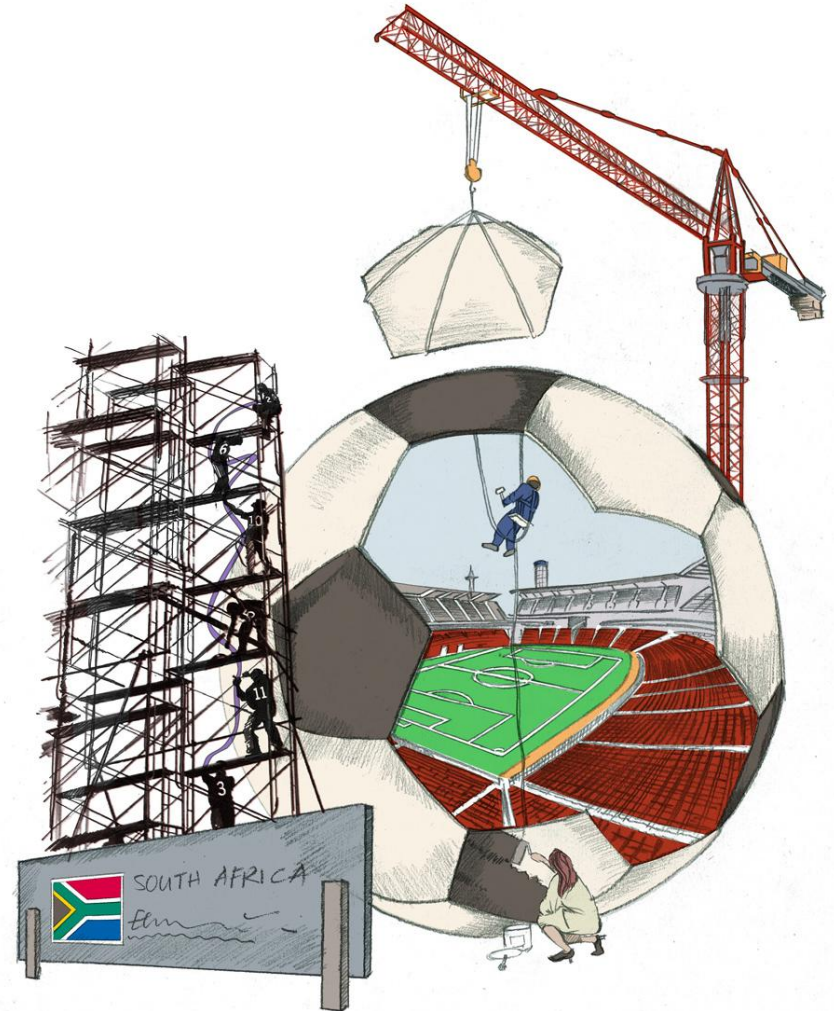


# Updated economic impact of the 2010 FIFA World Cup



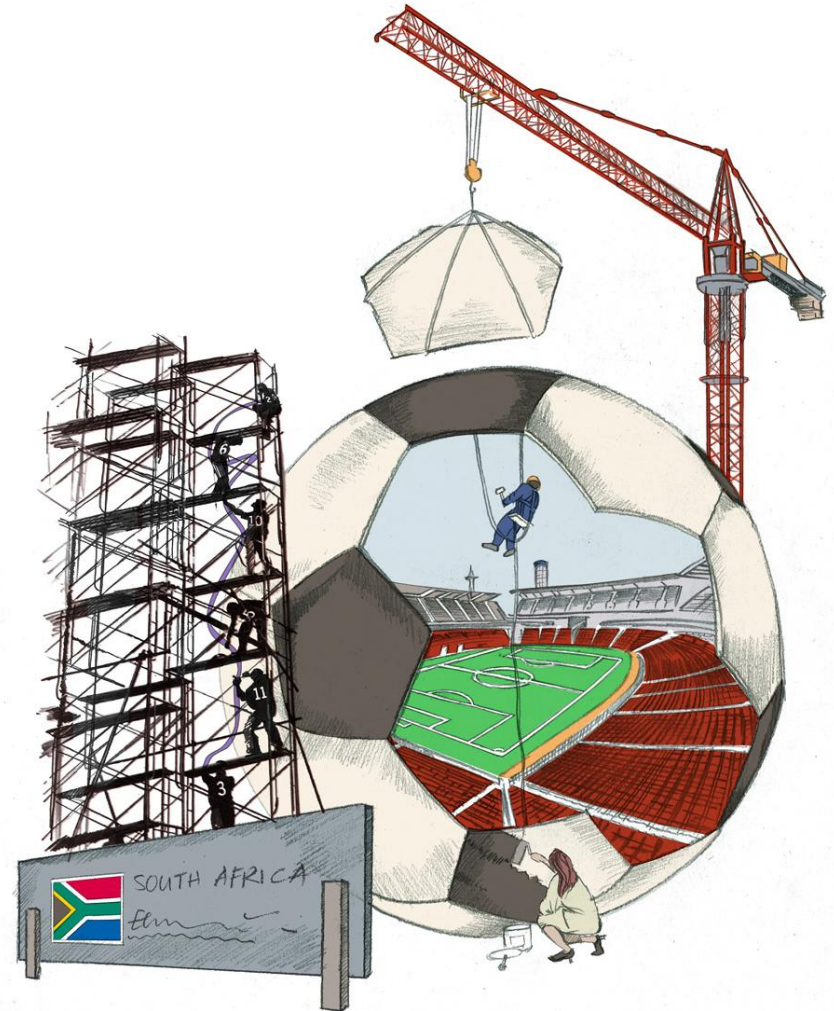
Welcome

Leonard Brehm  
National Chairman  
Grant Thornton South Africa  
21 April 2010



# Updated economic impact of the 2010 FIFA World Cup

Gillian Saunders  
Principal  
Grant Thornton Strategic Solutions  
21 April 2010



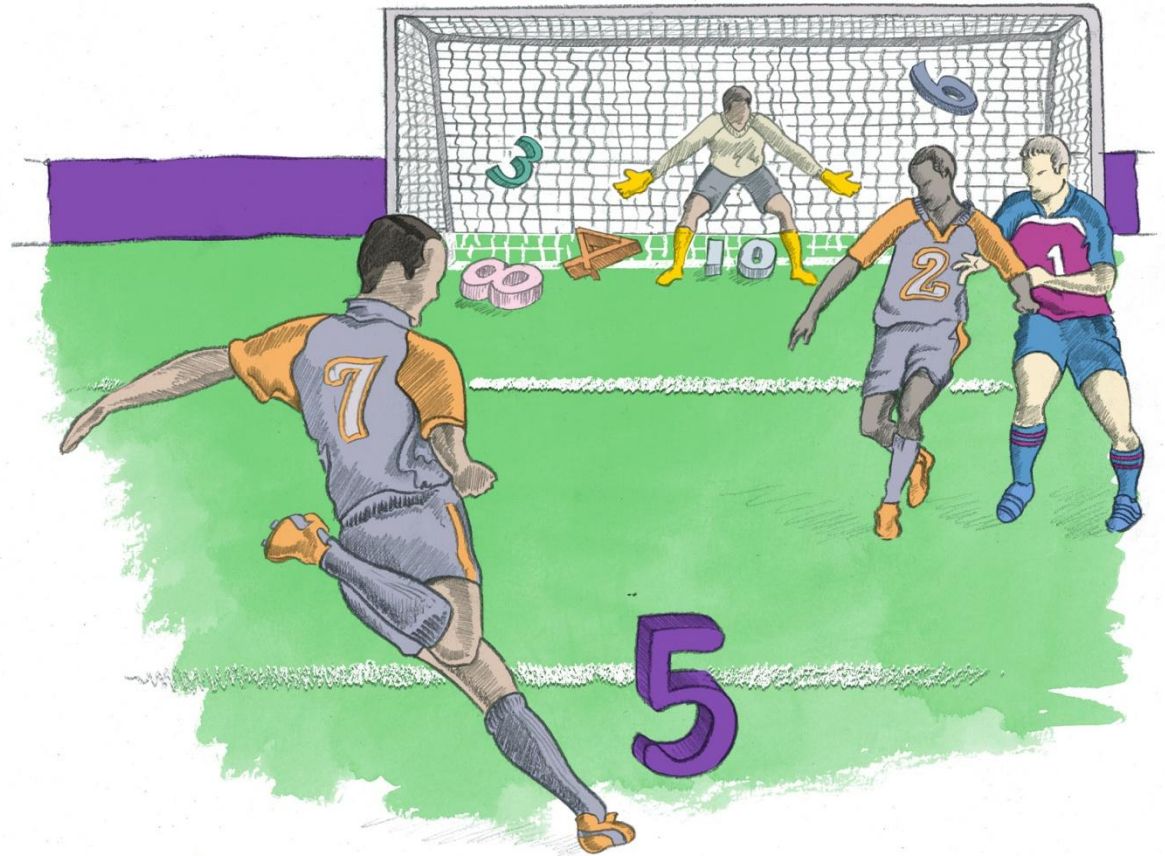
# Context

- 2006 bid economic impact
- 2010 bid economic impact
- 2 high level updates – 2007 and 2008
- final update of projections
  - post recession
  - after major ticket sales phases
- done by Grant Thornton
- limited information from Match, LOC, FIFA.

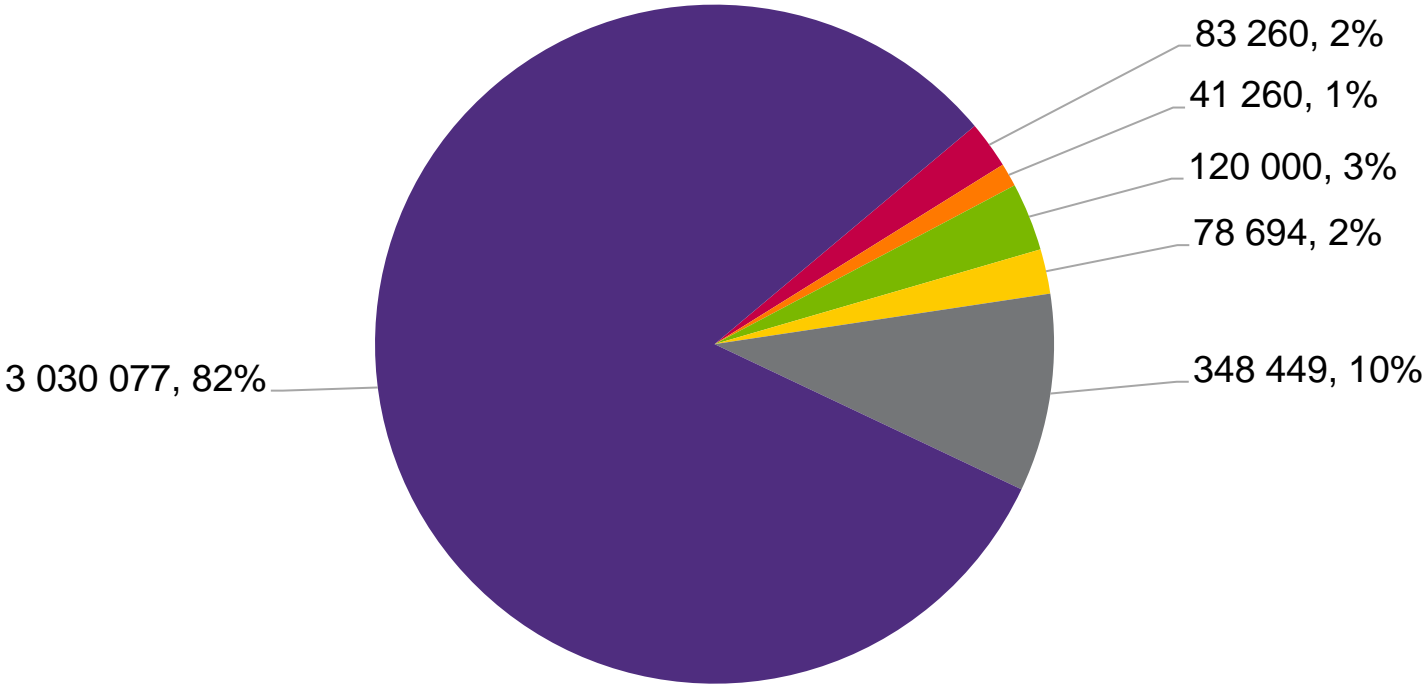
# Forecasting

- based on available information
- projection
- tourism impacts
  - disease – SARS/Swine Flu
  - terrorism – 9/11
  - recession – 2008/2009, 1998 Asian Crisis
  - wars – Iraq
  - volcanic ash.

# Ticket sales

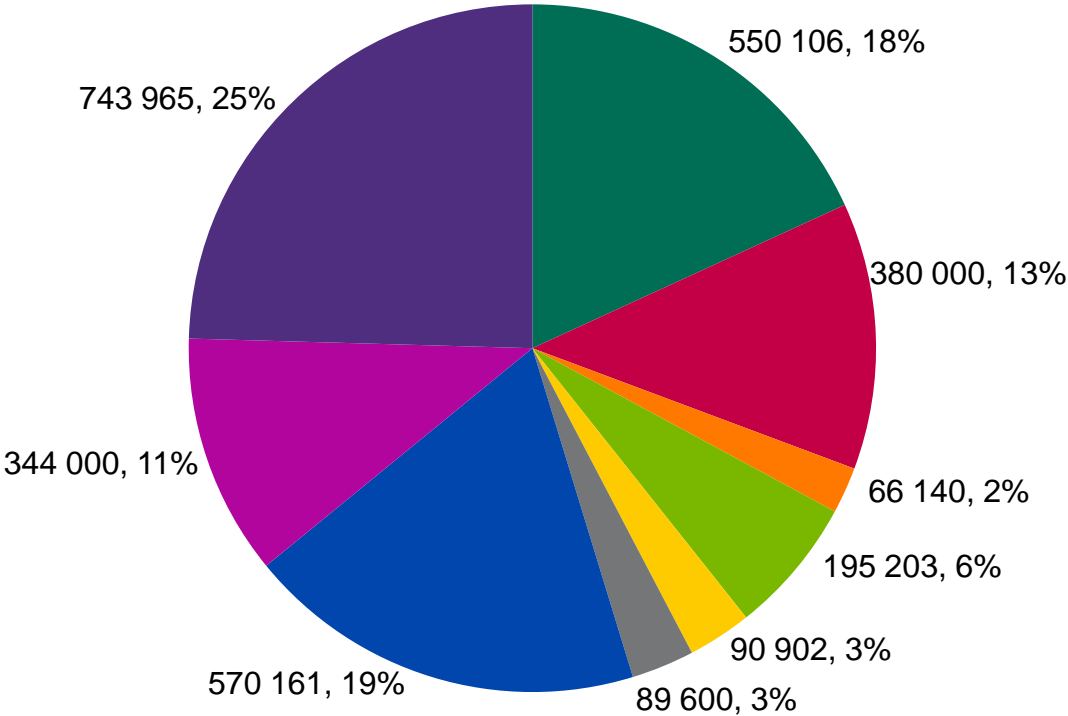


# FIFA's original allocation of total tickets 3,7 million



Media   VIPs   FIFA Ticket Fund   Other Complimentary   Contingency   Purchasable

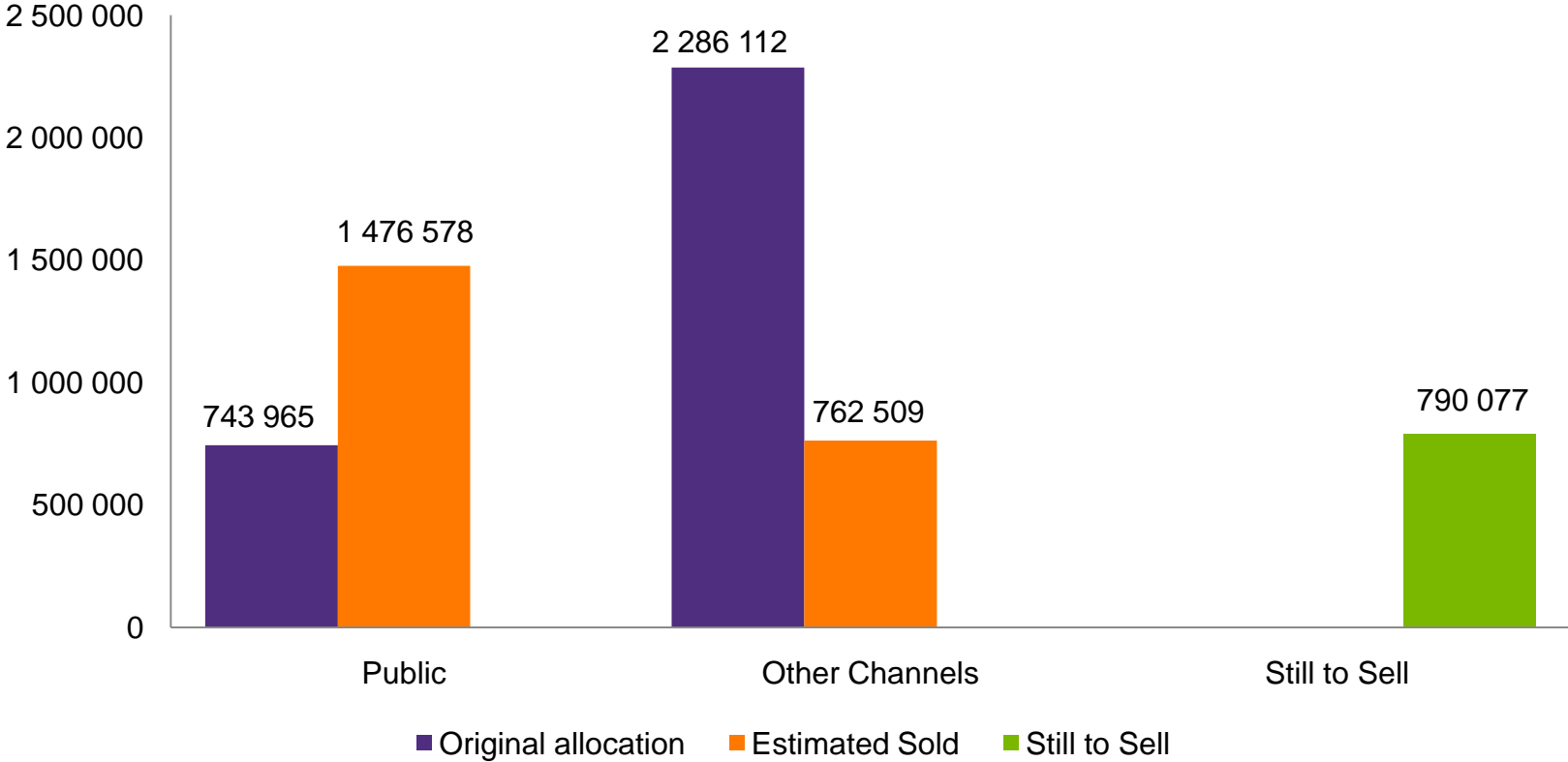
# FIFA's original purchasable tickets 3,03 million



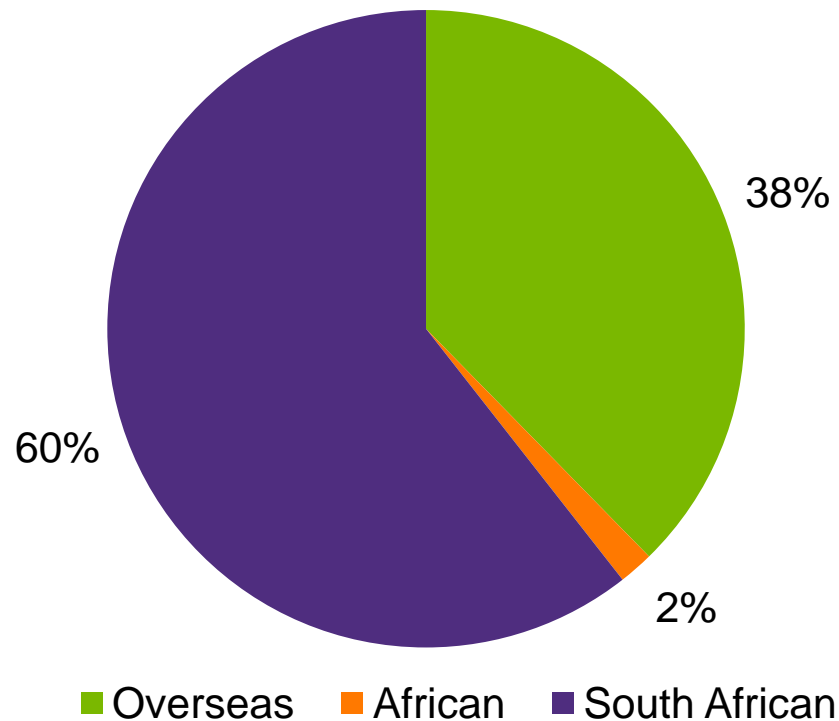
■ Commercial affiliates ■ Hospitality ■ Broadcast partners ■ FIFA ■ OC ■ PMA ■ PMA fans ■ Tour operators ■ Public



# Ticket allocations and estimated sales

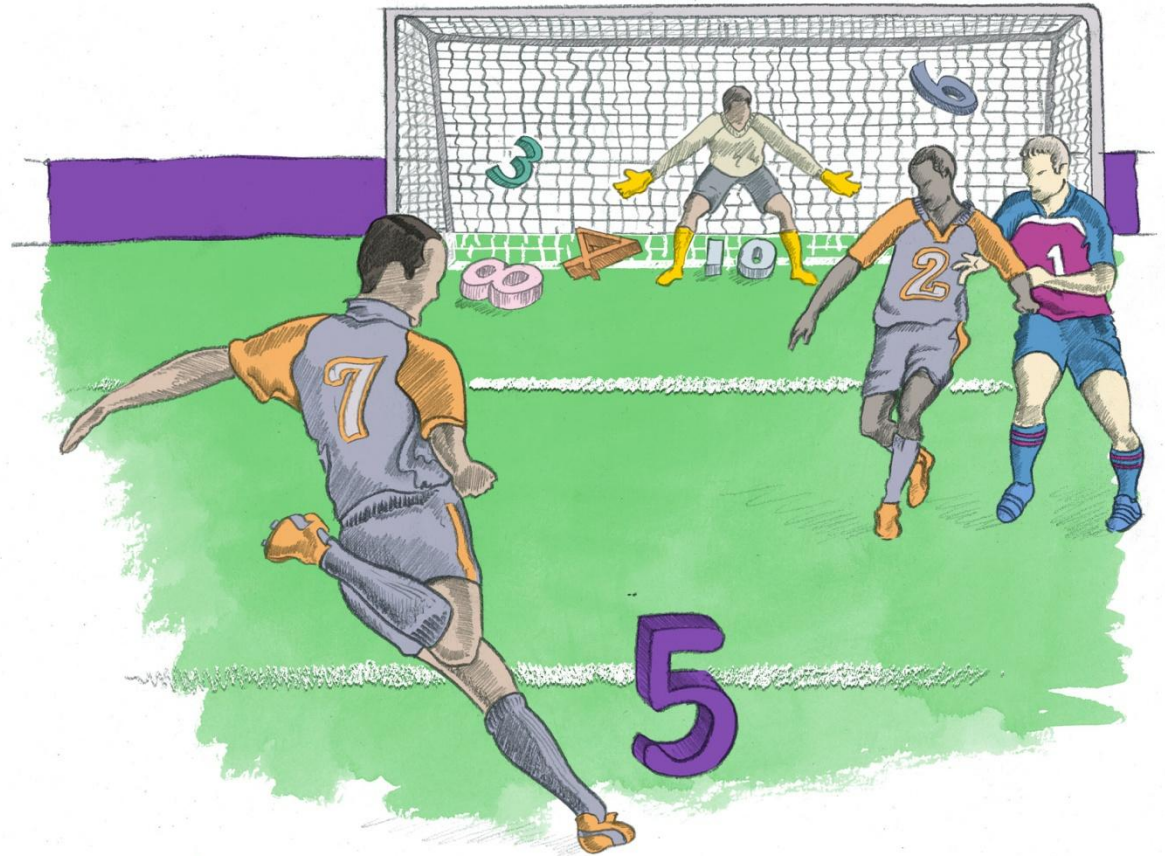


# Projected ticket sales 3,05 million

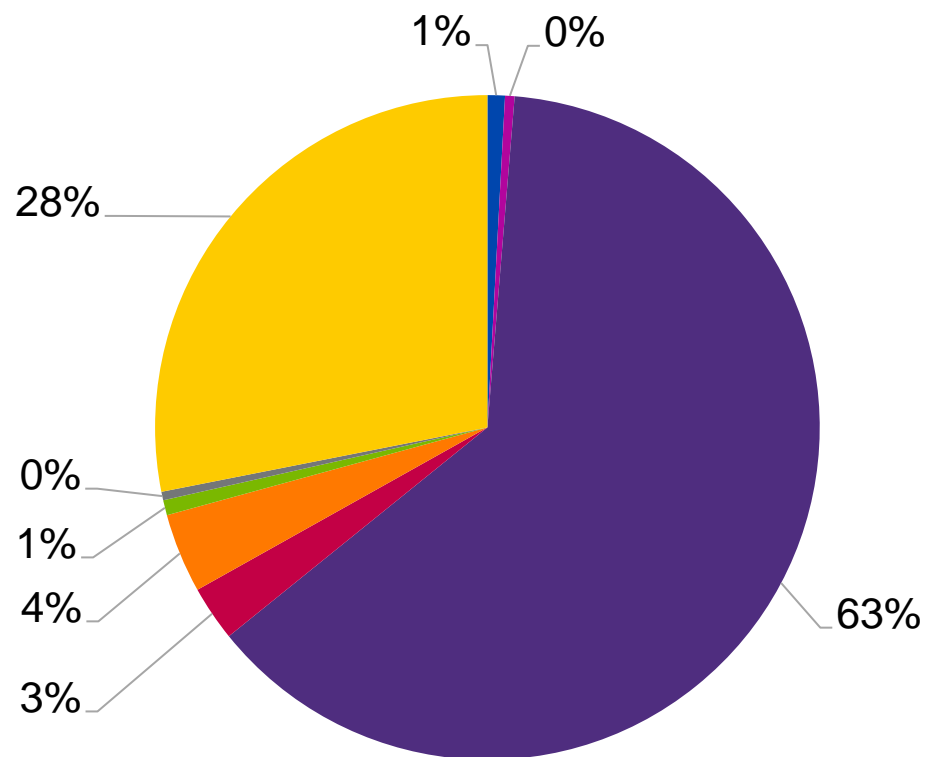


\* Excludes complimentary, contingency and some "unsold" in all categories except public, includes VIP tickets

# Visitors



# Foreign visitors – 373 000



■ Sponsors & Broadcast  
■ PMA, OC FIFA  
■ Teams

■ Hospitality  
■ Media  
■ Non-ticket holders

■ Public (incl TO & PMA fans)  
■ VIPs

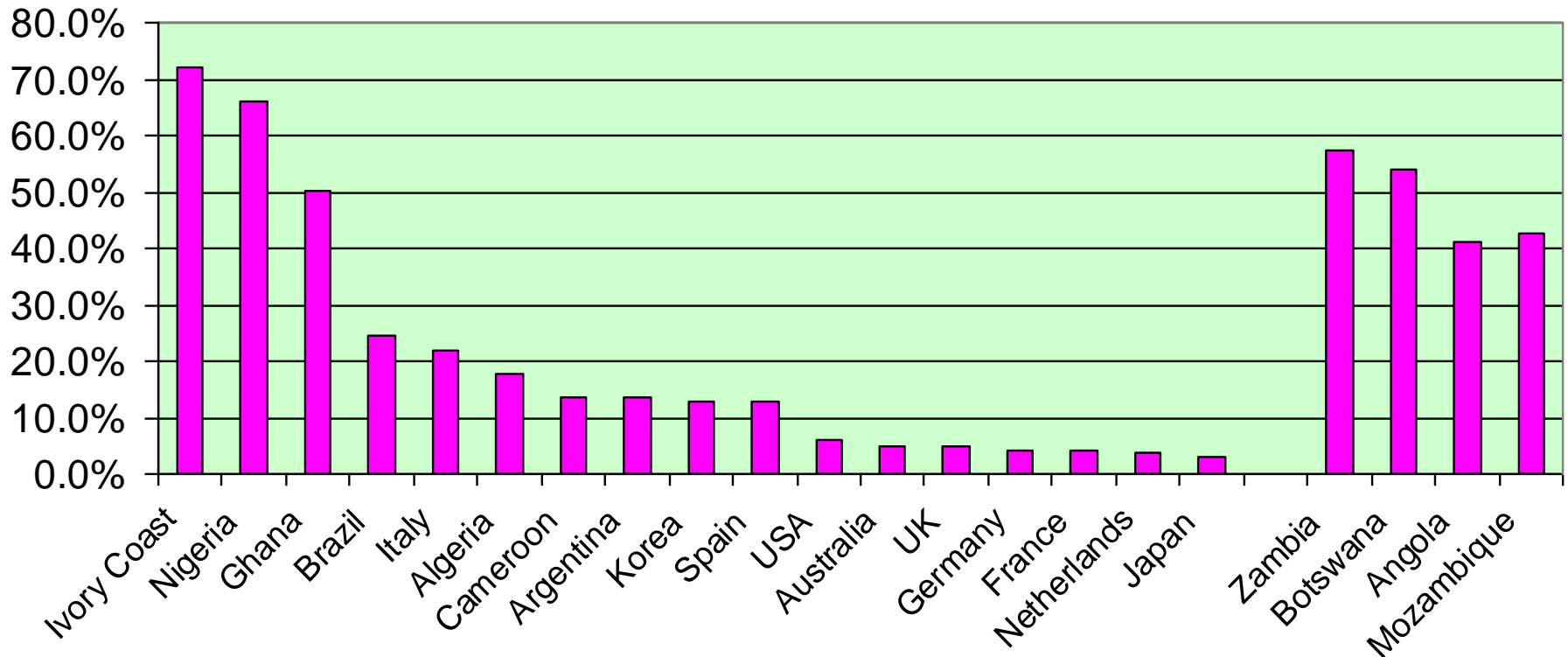
# Change in numbers

	Was	Now	% change
Total visitors	483 000	373 000	-22.7%
Average length of stay (overseas visitors)	14 days	18.7 days	+33.0%
Average spend per trip in SA	R 22 000	R 30 200	+ 35,5%
Overseas ticket holders	288 867	228 519	-21%
Overseas non-ticket holders	25 000	20 000	-20%
African ticket holders	48 145	11 289	-77%
African non-ticket holders	100 000	85 000	-15%
Matches per foreigner	3.4	5	
Germany (matches per foreigner)	2.6		

# Attractiveness of SA for 2010

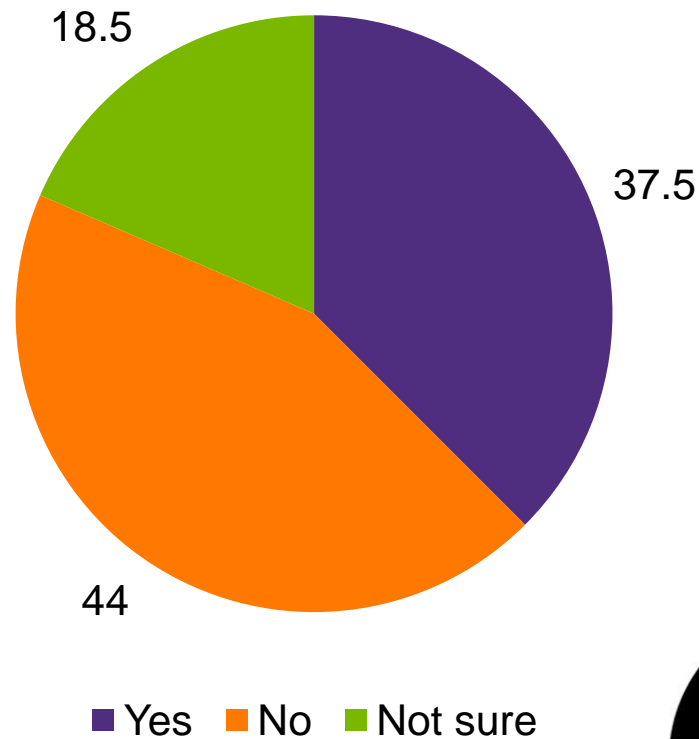
Survey of 29 countries sample 80 – 110 per country

## Serious or Thinking of Coming to SA for 2010

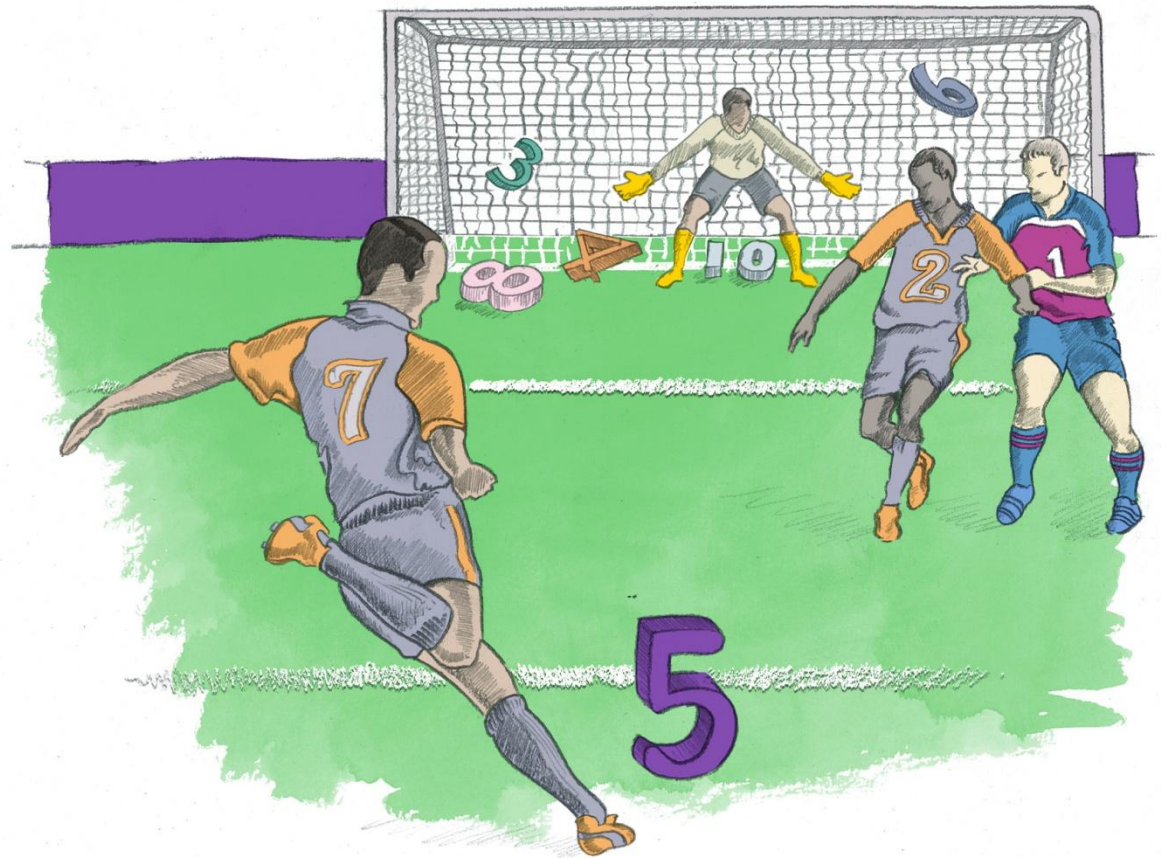


# Key findings: Cameroon fan profile

Will you attend the 2010 FIFA World Cup in South Africa? (n=728, in %)

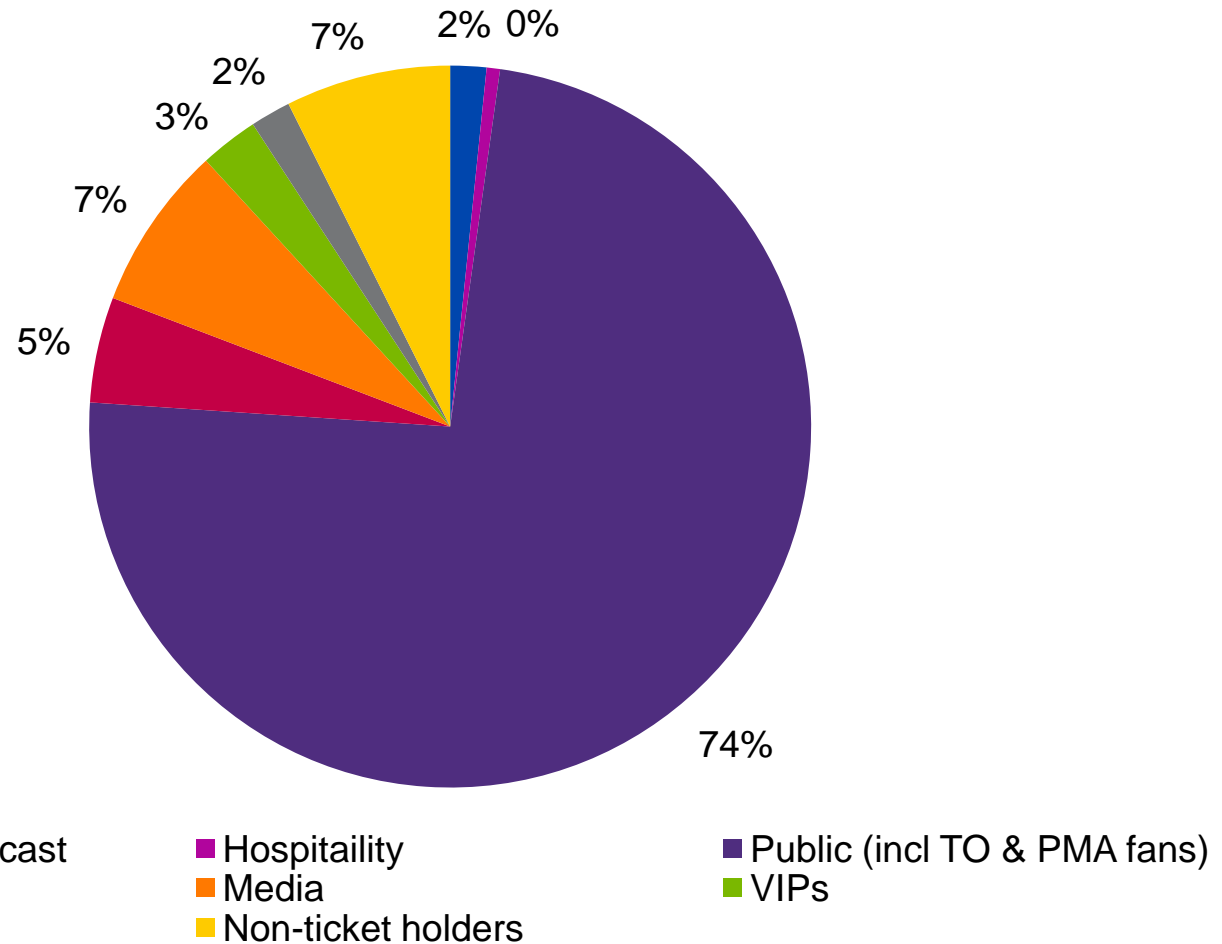


# Spend





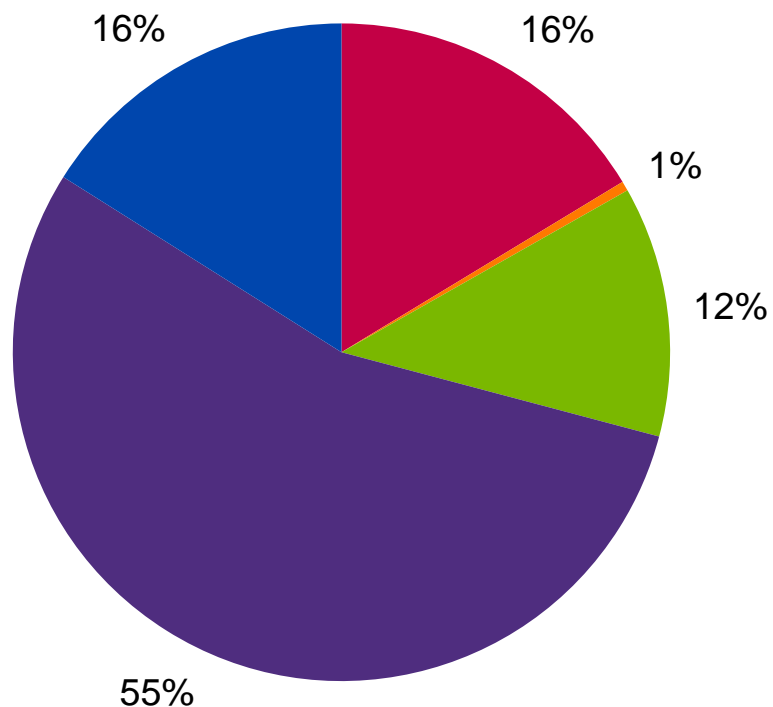
# Foreign spend - R8,8bn



# Total spend in the SA economy – R55,3bn



# Economic impact by category – R93bn



■ Foreign Tourism

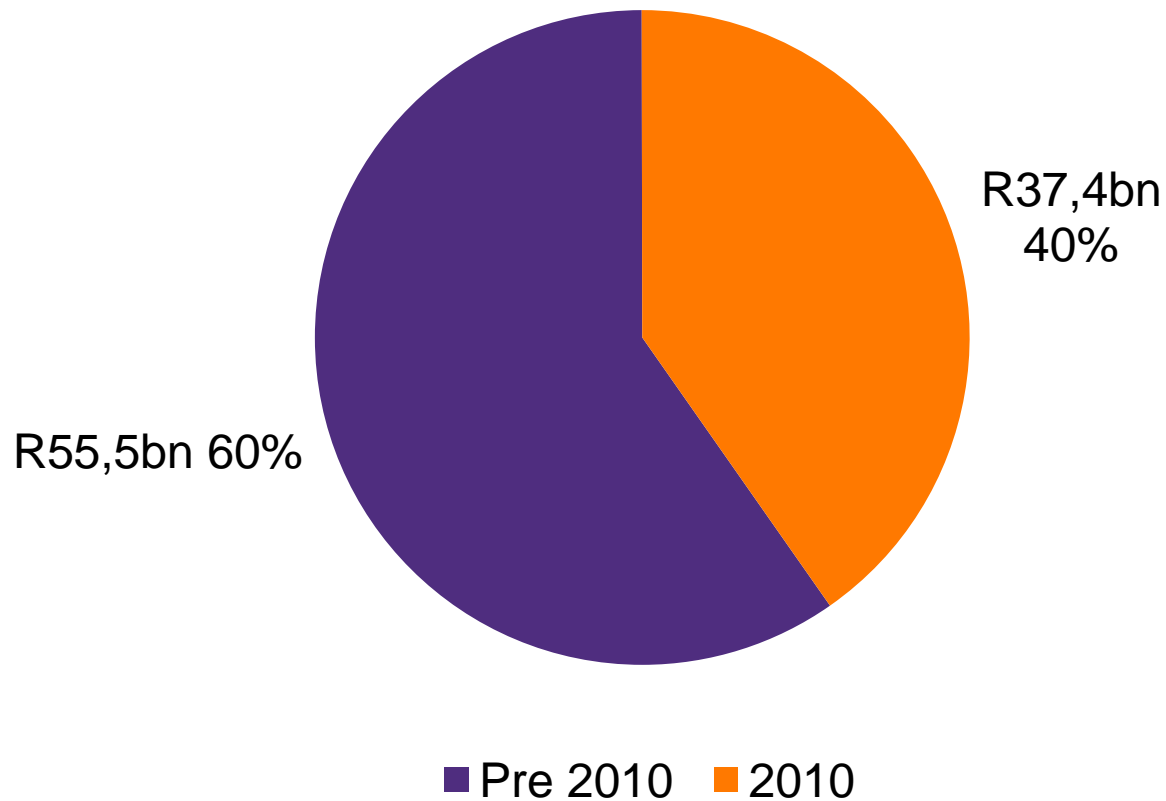
■ National Government

■ Domestic Tourism

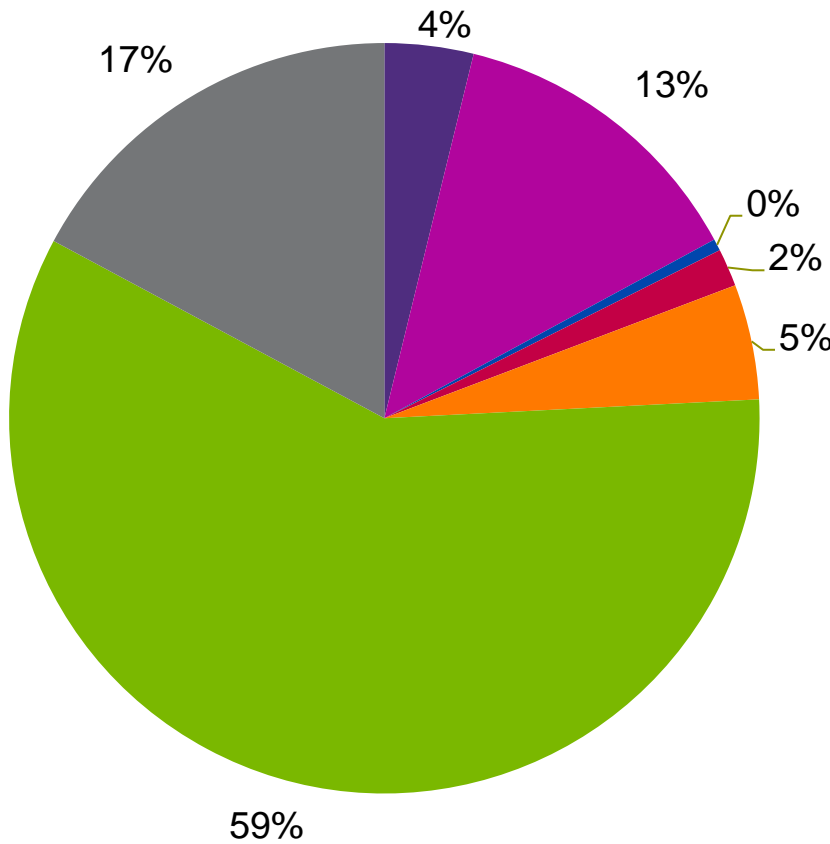
■ Provincial & City Government

■ Organising Spend

# Economic impact pre and during – R93bn



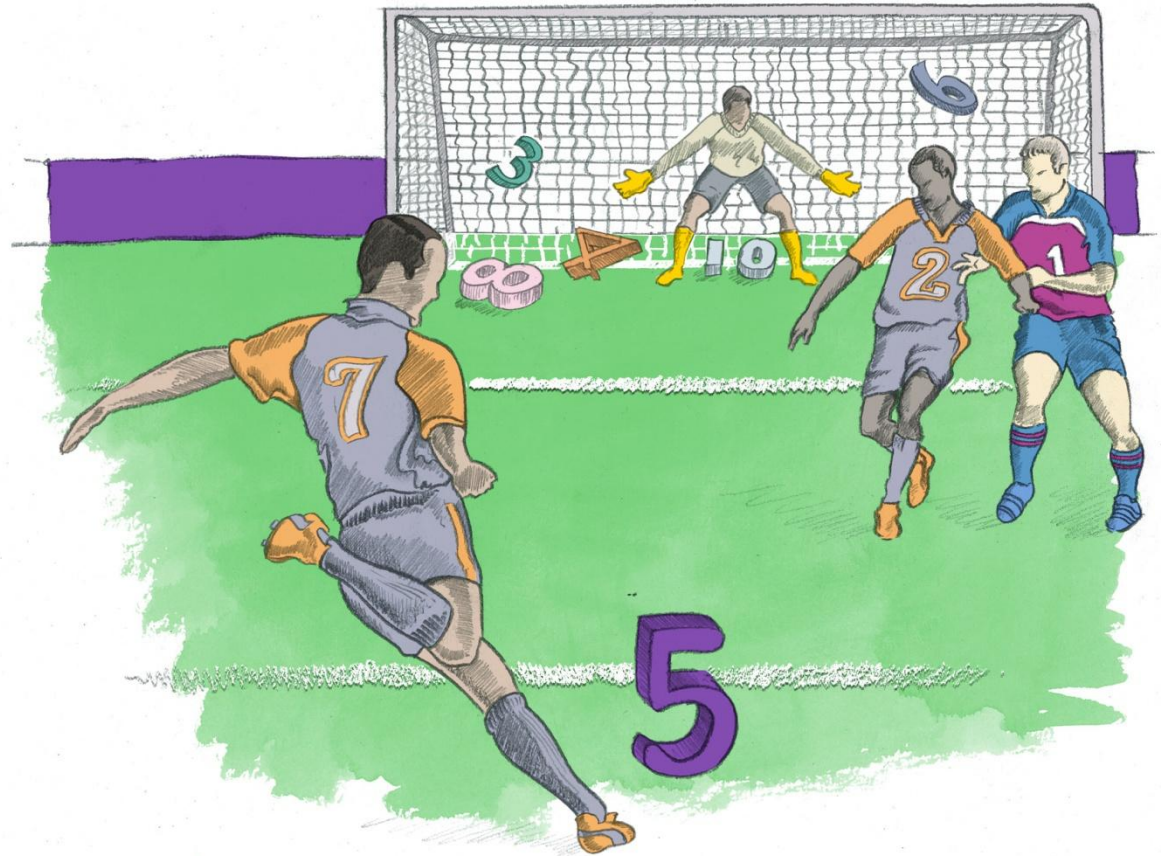
# Total and additional economic impact in 2010



Additional tourism in 2010	0.48%
Additional FIFA spend	0.06%
Total additional 2010 GDP impact	0.54%
2010 GDP contribution	1.72%

- Displaced foreign tourism
- Additional Foreign Tourism
- Domestic Tourism
- Additional Organising Spend FIFA in SA
- Organising Spend
- National Government
- Provincial & City Government

# Key points



In 2007 we projected 483 000 visitors.

Current estimate totals 373 000 visitors, many of whom will stay longer and spend more

Gross economic impact is considerably higher – R93 bn

Net additional economic impact in 2010 is significant - R13bn



Government spend increased significantly

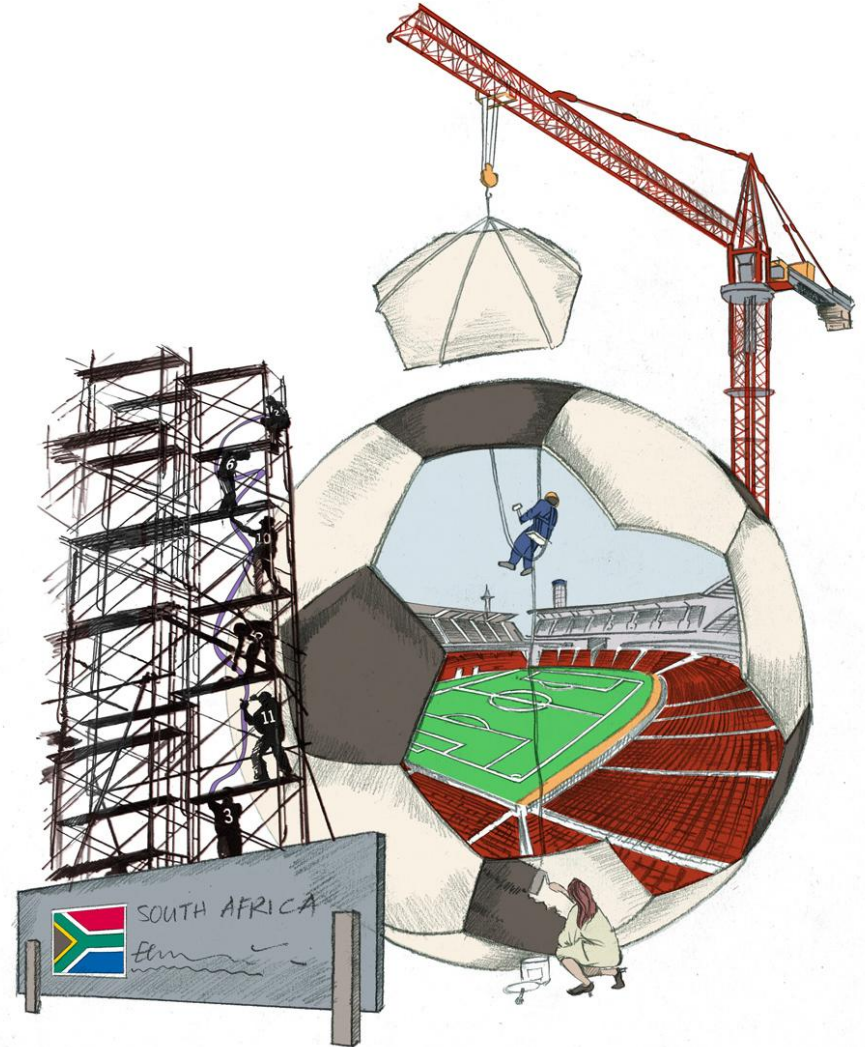
Stadia will be full

It will be great event

Profiling and future spin-offs are  
the real benefit

# Questions

Gillian Saunders  
Principal  
Grant Thornton Strategic Solutions  
21 April 2010



# Digital media press kit

Visit our website [www.gt.co.za](http://www.gt.co.za) for copies of:

- press release
- presentation
- press style photographs of Gillian Saunders

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