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ADVISORY

FIFA WORLD CUP QATAR 2022: ASSESSING TOURISM LEGACY IMPACT OF SELECT MIDDLE EASTERN & NORTH AFRICAN DESTINATIONS

A Skift Advisory Thought Leadership Report

November 2023



STUDY & TOPLINE FINDINGS

About the SKIFT ADVISORY FIFA World Cup Qatar 2022 Brand Perceptions Study

We surveyed 15,000 international travel consumers from 20 outbound markets to determine the impact of the FIFA World Cup Qatar 2022 on travelers' brand perceptions and willingness to travel to select Middle Eastern/North African destinations.

Research Objective and Approach



We conducted a study to assess the influence of major international events, including the FIFA World Cup Qatar 2022, on travelers' perceptions of destination brands and their willingness to travel to host and surrounding destinations post event – i.e., legacy tourism.

To achieve this, a survey was administered to 15,000 respondents from 20 countries to determine the impact of the FIFA World Cup Qatar 2022 on their willingness to travel to eight Middle Eastern/North African destinations, including Qatar, Dubai (UAE), Abu Dhabi (UAE), Morocco, Egypt, the Kingdom of Saudi Arabia, Oman and Bahrain.

Respondent Statistics



15,000 Travel consumer surveyed*



20 outbound source markets covered



22 metrics assessed

Key Metrics

Understanding the impact of
FIFA World Cup Qatar 2022
on the Middle East

Willingness to travel

Our survey gauged respondents' sentiments towards Middle Eastern/North Africa destinations and their level of willingness to travel to these destinations following the most recent FIFA World Cup.

Regional Preferences

The respondents in our study were from 20 countries across the globe, resulting in diverse and contrasting demographic profiles.

Change after the FIFA World Cup

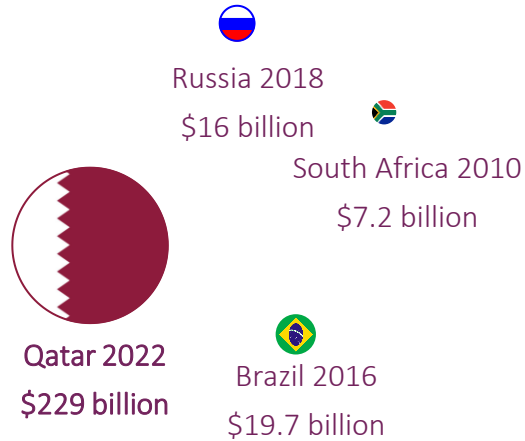
Our study documented shifts in sentiment triggered by the FIFA World Cup and identified participants who displayed increased willingness, decreased willingness, or no change in their inclination to travel to eight Middle Eastern/North African destinations.

*Quantitative online market research survey of representative samples of adult travel consumers in 20 countries, adhering to ESOMAR market research standards (March/April 2023)

Context and Background

The FIFA World Cup Qatar 2022 has been the most expensive hosted World Cup by far, with Qatar investing roughly the amount of \$229 billion over the past decade – what has been the tourism legacy?

Comparing Modern World Cup Investment Volume by Host Country (USD)






What Qatar Built for the Most Expensive World Cup Ever

EDITOR'S PICK
The Money Behind The Most Expensive World Cup In History: Qatar 2022 By The Numbers

- The 2022 Qatar world cup was the most expensive World Cup by a significant margin, with over **5.4x** the spending compared to the **previous 3 World Cups combined** and exceeding the cost of **all other World Cups combined**.
- Compared to standard world cup infrastructure investments such as stadiums and practice facilities, huge amounts of additional spend went into the following:
 - **Large air-cooling systems** to keep players and fans at more comfortable temperatures in 8 massive stadiums
 - **Water/nursery infrastructure** and **maintenance costs** for **imported grass seeds** used for pitches
 - **Private islands, apartments, villas, and luxury hotels**

Middle East Sports Investment Landscape

-  Formula One Events
-  Golf and Tennis Tournaments
-  New championship leagues

Qatar’s hosting of the FIFA World Cup fits into a trend of rapidly growing sports investment in the Middle East, which is slated to grow at a rate of 8.7% in the next 3-5 years. Neighboring countries like Saudi Arabia, Bahrain, and the UAE are attracting wealthy sports tourists through landmark F1, golf, and tennis tournaments.

Similarly, the Middle East is developing sports leagues to create stabilized sports demand – including the Saudi Pro football league, which has recently picked up perennial star, Cristiano Ronaldo, in a \$638 contract.

Implications

Qatar aimed to leverage the power of a major international sporting event to support its brand positioning; despite significant investment, data suggests neighbors are reaping some brand benefits without incurring large development costs.

Data observations:

1. Willingness to travel varied significantly by respondent country and region
2. Most respondents had no change in travel sentiment to the listed Middle Eastern destinations after the World Cup
3. Amongst the respondents that had a change in sentiment, there appears to be polarization based on respondents' nationality
4. Dubai appears to have received net benefit from the World Cup 2022 based on respondents' positive travel sentiment and relatively lower negative sentiment

Main Implications

Return on Investment – Legacy Tourism

Most respondents indicated no change in sentiment towards future travel to Middle Eastern destinations, which raises the question: were legacy tourism development plans in place to effectively leverage the medium and long-term impact of the event?

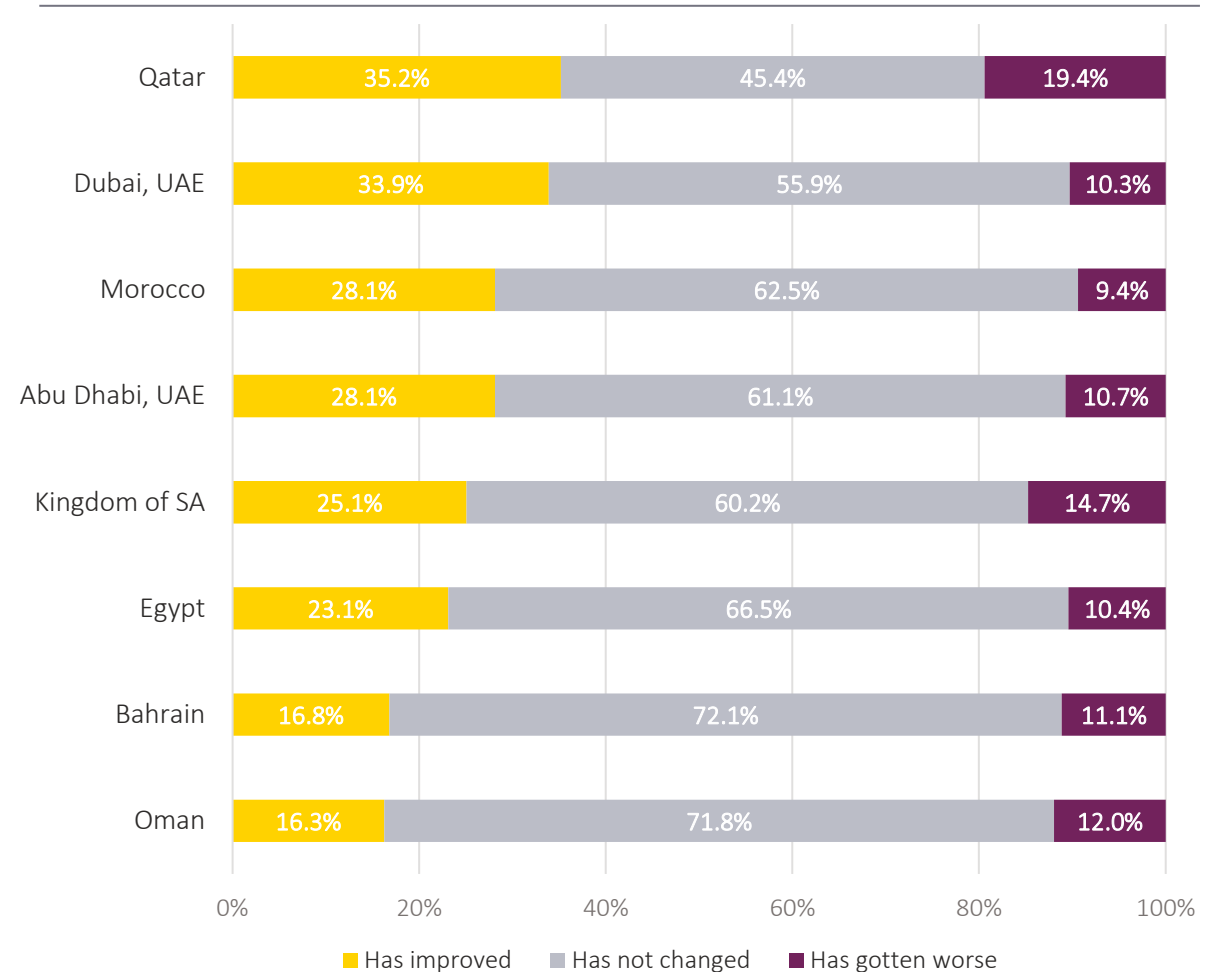
Political Exposure

Increased exposure from the World Cup led to some negative sentiment from travel consumers in select Western countries – potentially impacting how destination brands were perceived and forward travel intentions.

Impact of Sports Culture

Morocco's positive standing in the World Cup could have had an impact in its brand standing, specifically in countries like Brazil and Nigeria – where soccer is predominant in popular, family, and social culture.

Change in Sentiment Towards Middle Eastern/North African Destinations after the FIFA World Cup Qatar 2022



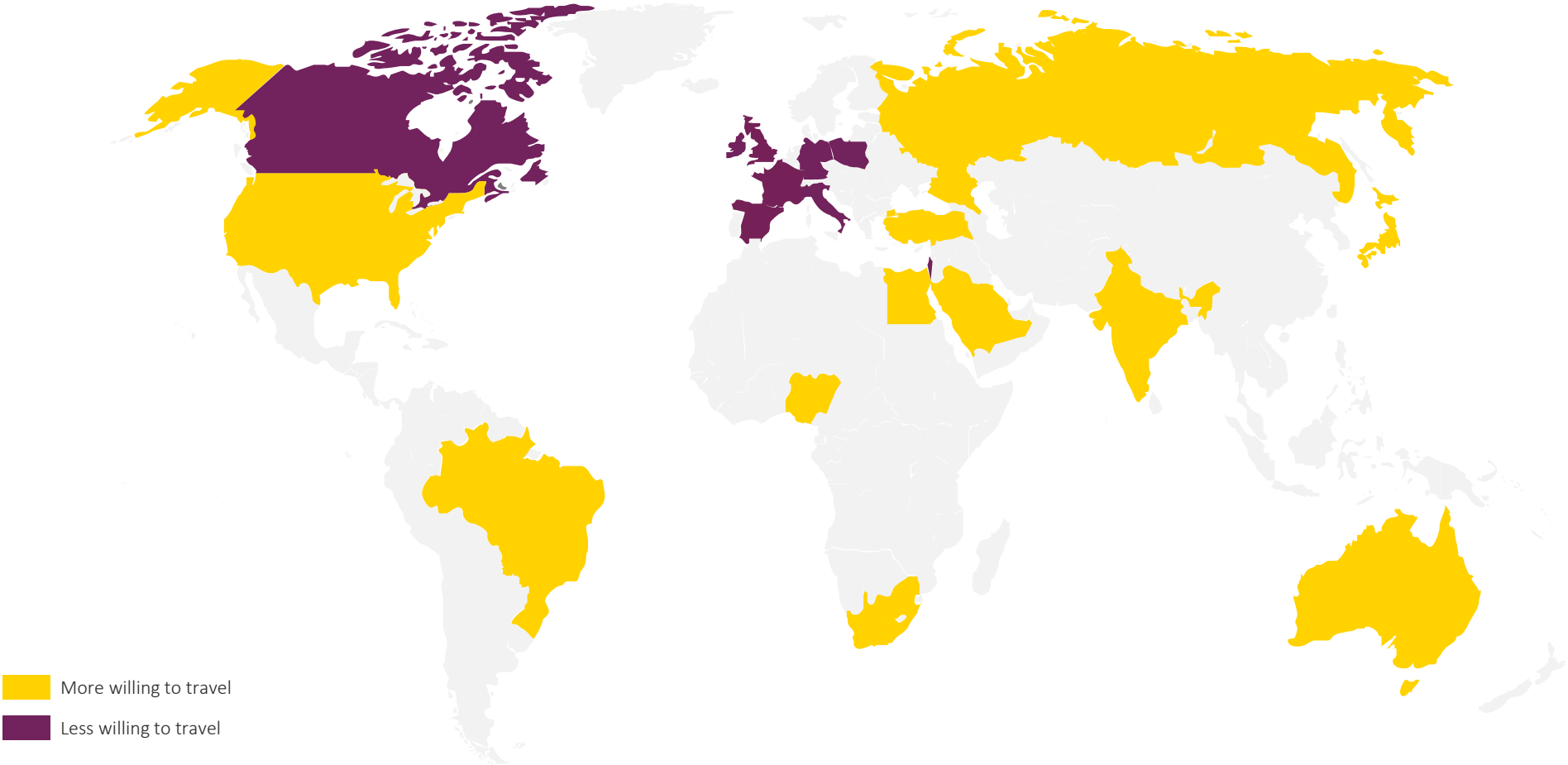


KEY MARKET INSIGHTS

Overview

Results suggest willingness to travel to select Middle Eastern and North African destinations decreased in Canada and European countries, while increasing in the US, Russia, Australia, Turkey and the global South.

Source Markets' Willingness to Travel to Middle Eastern/North African Destinations after the FIFA World Cup Qatar 2022



Overview

At the aggregate level, the results point to a greater willingness to travel to select Middle Eastern and North African destinations post FIFA World Cup.

Scores for willingness to travel to Dubai increased the most among the tested destinations

Dubai stands out among all the Middle Eastern/North African destinations in terms of positive attitude change, according to the survey respondents. A notable 35.4% of all participants expressed a greater willingness to travel there, while only 13.9% reported feeling less inclined to visit Dubai following the FIFA World Cup Qatar 2022.

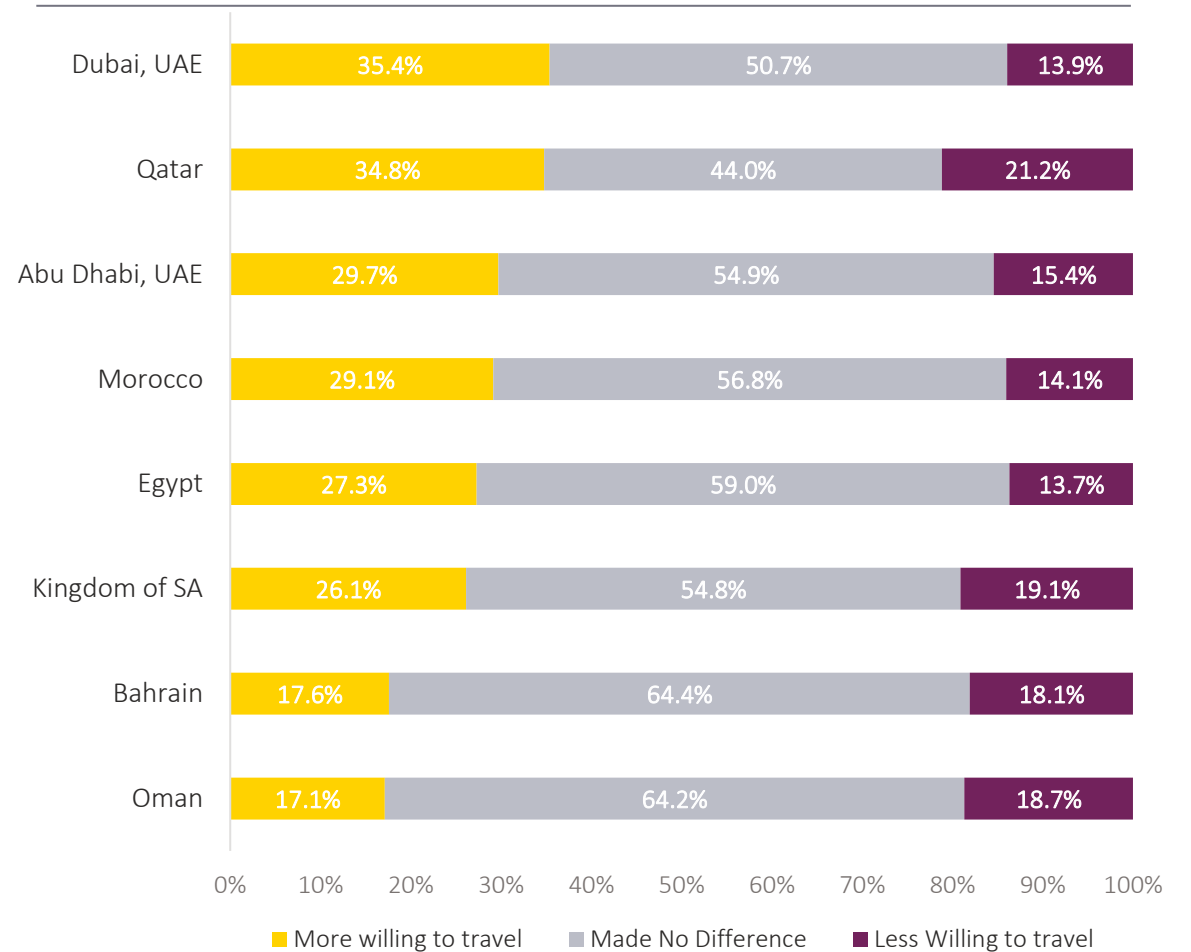
There is a conflicting response in travel to Qatar, as seen by a polarization of attitudes among survey countries

Qatar comes second after Dubai, with 34.8% of all survey participants indicating an increased likelihood of traveling there. However, Qatar also tops the list for decreased travel intentions, with 21.2% of all respondents reporting feeling less willing to visit the country. While regions such as Europe express reduced travel intentions, African and Middle Eastern countries exhibit a heightened enthusiasm for visiting Qatar.

Most respondents are indifferent towards travel to Middle Eastern/North African countries

Interestingly, a great plurality of respondents expressed a neutral stance towards traveling to the listed Middle Eastern/North African destinations. Oman and Bahrain garnered the highest level of indifference, with approximately 64% of participants reporting no change in their travel intentions towards these countries. Similarly, Oman and Bahrain ranked the lowest, as less than one in five respondents indicated an increased willingness to visit these countries after the FIFA World Cup. Bahrain and Oman were also the only two countries that had a higher percentage of respondents indicating that they would be less willing to travel (~18%) than more willing to travel to these countries (~17%).

Change in Willingness to Travel to Middle Eastern Destinations after World Cup

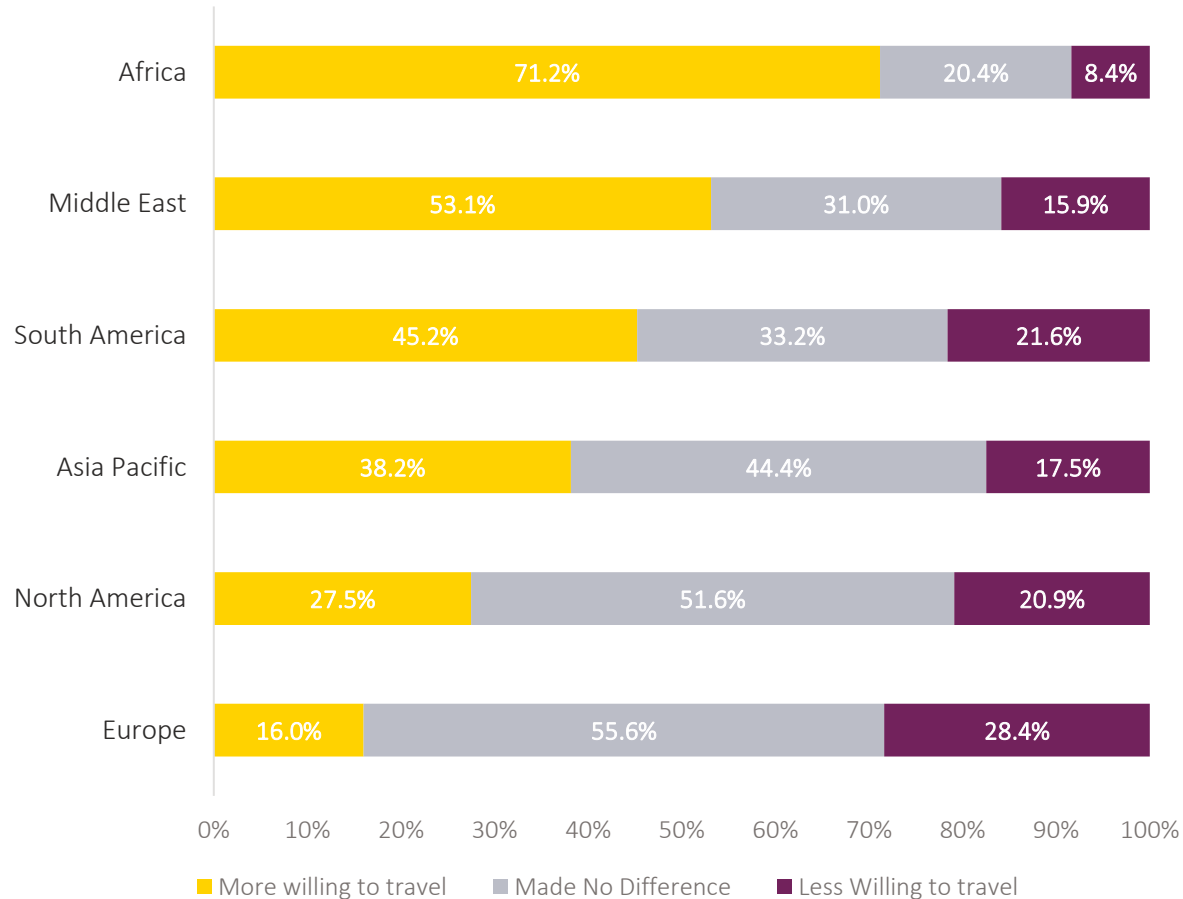


Qatar

Qatar elicited a polarizing results from survey respondents, with the largest number expressing both increased and decreased interest in traveling to the country after the FIFA World Cup Qatar 2022.



Change in Willingness to Travel to Qatar by Region



There is a polarized view between African and European countries, in particular, in their willingness to travel to Qatar

African countries showed the greatest increase in travel intentions to Qatar after the latest FIFA World Cup, with 71.2% of participants indicating an increased willingness to travel there, followed by Middle Eastern countries with 53.1%. In contrast, only 16% of European respondents and 27.5% of North American respondents reported an increased willingness to travel to Qatar. European respondents, in particular, ranked the highest for indicating a decreased intention to travel to Qatar at 28.4%.

European countries also showed the highest indifference in travel to Qatar

European countries have the highest percentage of respondents reporting no change (55,6%) in their travel intentions to Qatar after the FIFA World Cup. Conversely, African countries appear to be most impacted by the latest FIFA World Cup in terms of change in willingness to travel to Qatar with only 20,4% indicating no change in willingness to travel.

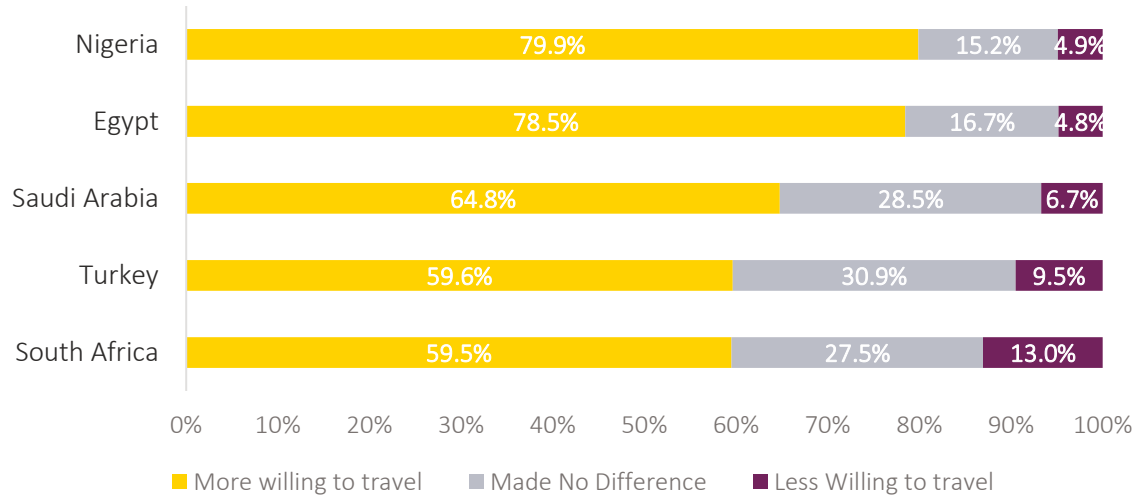
The data reveal a clear division between Canada and European countries and the rest of the world. Participants from African and Middle Eastern countries showed a greater willingness to travel to Qatar after the FIFA World Cup, while most European and Canadian respondents remained neutral or expressed a decreased intention to visit the country.

Qatar

The polarization of travel intentions is evident when analyzing the country-level data.

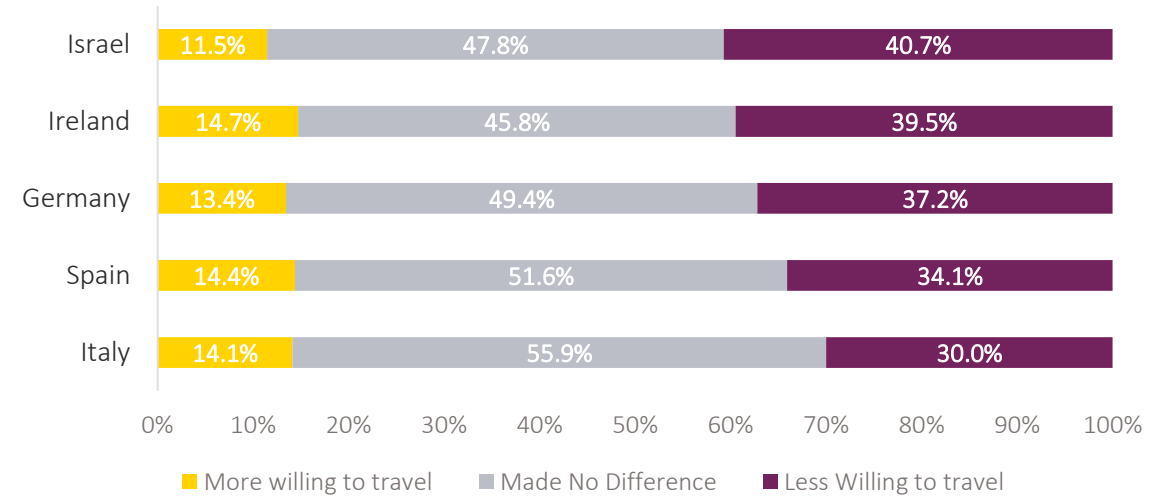


Top 5 Respondent Countries More Willing to Travel to Qatar than Before



Middle East and African countries, in particular, are the most willing to travel to Qatar. Nigeria topped all the source markets with the highest percentage of respondents indicating an increased willingness to travel to Qatar after the FIFA World Cup Qatar 2022, at 79.9%. Only 4.9% of Nigerians indicated a decreased willingness to travel to Qatar. Egypt ranked second with 78.5% of respondents expressing an increased intention to visit Qatar, followed by Saudi Arabia (64.8%), Turkey (59.6%), and South Africa (59.5%). Overall, it is apparent that the countries with the highest percentage of respondents indicating an increased willingness to travel to Qatar are predominantly from the Middle East and Africa.

Top 5 Respondent Countries Less Willing to Travel to Qatar than Before



Countries that are least willing to travel to Qatar also report the highest indifference of travel to Qatar

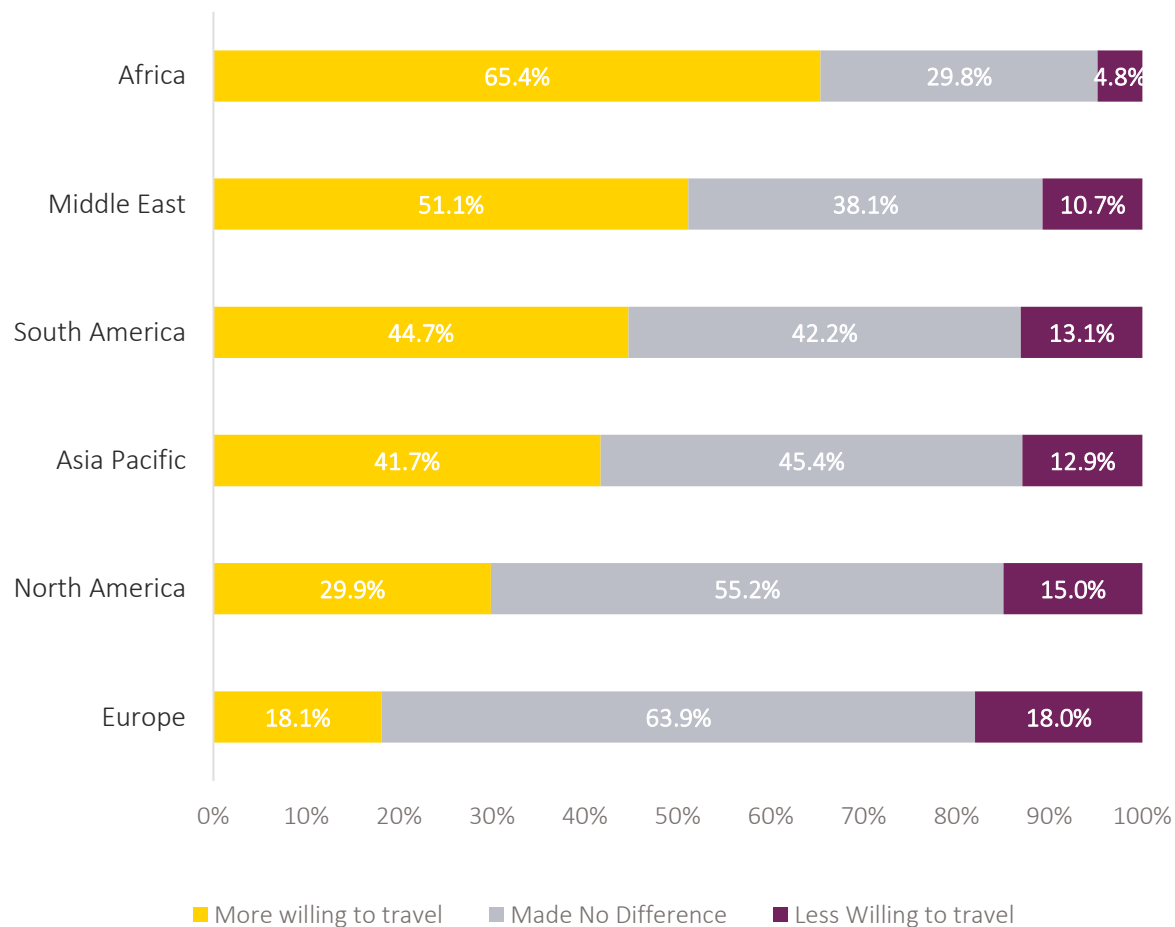
On the other end of the spectrum, Israel tops the list of countries indicating a decreased willingness to travel to Qatar after the latest World Cup, with 40.7% of respondents expressing a reduced intention to visit the country. Ireland comes in second on the list of countries indicating a decreased willingness to travel to Qatar, with 39.5% of respondents reporting a reduced intention to visit the country. Germany follows closely behind with 37.2%, then Spain with 34.1%, and Italy with 30%. Compared to countries with majority indicating increased travel intentions, countries with majority indicating decreased travel intentions to Qatar have a larger proportion of people reporting no change in their decision.

Dubai

Dubai is capitalizing on the positive exposure of the FIFA World Cup event despite not having hosted the games.



Change in Willingness to Travel to Dubai by Region



Dubai, like many other neighboring destinations in the Middle East, benefited significantly from Qatar hosting the World Cup without incurring the cost

The survey results for Dubai are similar to those for Qatar, with the highest positive conversion rates for willingness to travel to Dubai coming from African countries at 65.4%, followed by Middle Eastern countries at 51.1%, and South American countries at 44.7%. In contrast, European (18.1%) and North American (29.9%) respondents reported the lowest increase in willingness to travel to Dubai. However, unlike Qatar, more respondents indicated no change in their willingness to travel to Dubai, and a smaller percentage of participants from all regions expressed a decreased intention to visit the city.

European countries show a relatively higher positive and lower negative attitude towards travel to Dubai than to Qatar

European respondents showed polarization in their attitudes towards Dubai, with 18.1% indicating an increased willingness to travel to the city and 18% indicating a decreased willingness. Additionally, the largest proportion of European respondents (63.9%) reported no change in their attitude towards traveling to Dubai.

Egypt, Nigeria and India are the most willing countries to travel to Dubai

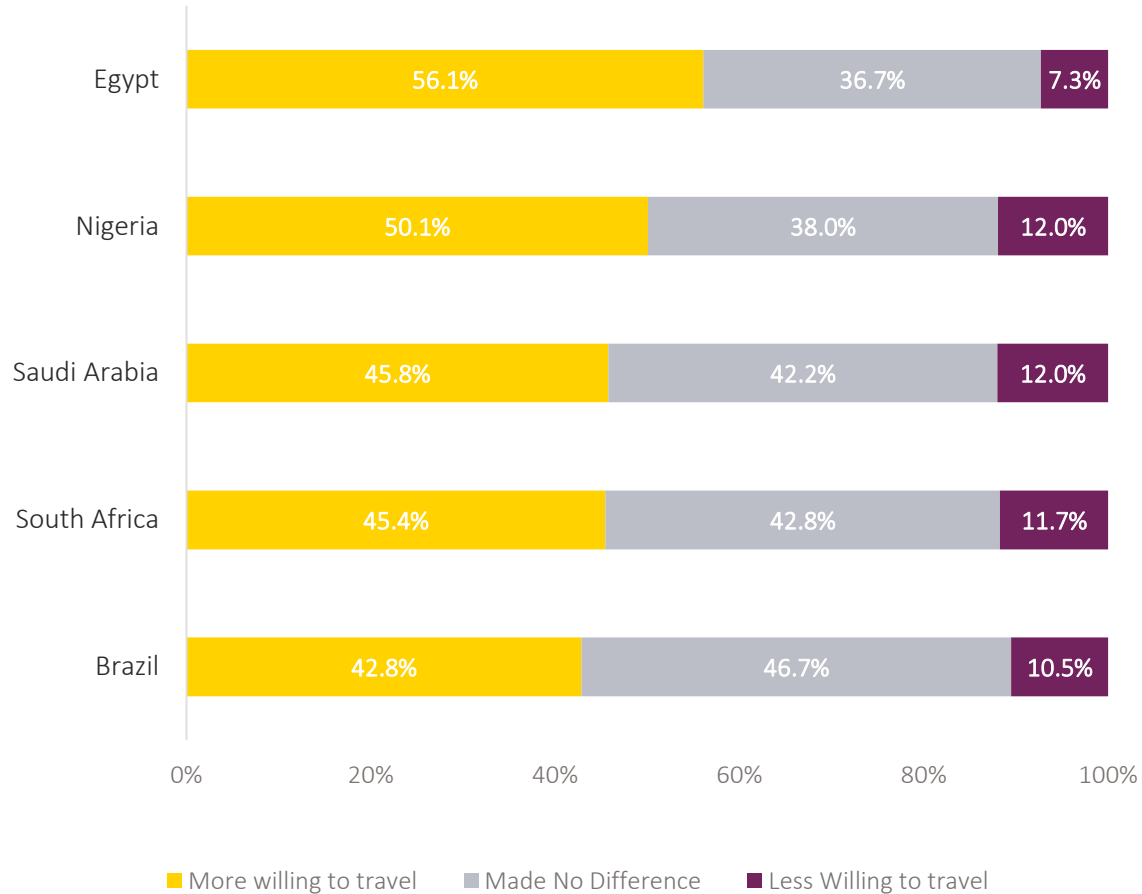
Egypt tops the list of countries with the highest percentage of respondents indicating an increased willingness to travel to Dubai, with 73.6% of Egyptians stating that they are more willing to visit the city. This is followed by Nigerians (70.7%) and Indians (61.9%).

Morocco

Countries such as Brazil and Nigeria, where soccer is a significant part of popular social culture, were likely influenced by Morocco's success in the World Cup.



Top 5 Respondent Countries More Willing to Travel to Morocco than Before



Morocco's success in the FIFA World Cup created a positive perception of the country as a travel destination, especially from countries that have a deep passion for the sport. Morocco's national team made it to the semi-final round against France in the FIFA World Cup 2022, which brought ample attention to the country and likely positively impacted its image as a travel destination. Among the countries with the highest percentage of respondents indicating an increased willingness to travel to Morocco, Egypt ranked first with 56.1% of respondents expressing an intention to visit the country. This is followed by Nigeria (50.1%), Saudi Arabia (45.8%), South Africa (45.4%), and Brazil (42.8%).

It is worth noting that Nigeria and Brazil, where football is a central part of popular social culture, are among the most positively influenced by Morocco's successful performance in the World Cup.

TO CONTINUE THE CONVERSATION, CONTACT:



Greg Klassen

Senior Director - Strategy
+ 1 604 376 6341
gk@skift.com



Oliver Martin

Senior Director - Innovation
+ 1 416 721 3544
om@skift.com



Joe Naaman

Managing Director
+ 1 609 575 2823
jn@skift.com



Michelle Gounden

Director - Insights
+ 27 73 085 7641
mg@skift.com

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