



# Foresight – issue 141

## Football tourism scores for Britain


**Inbound visitors that watch live football**

**September 2015**

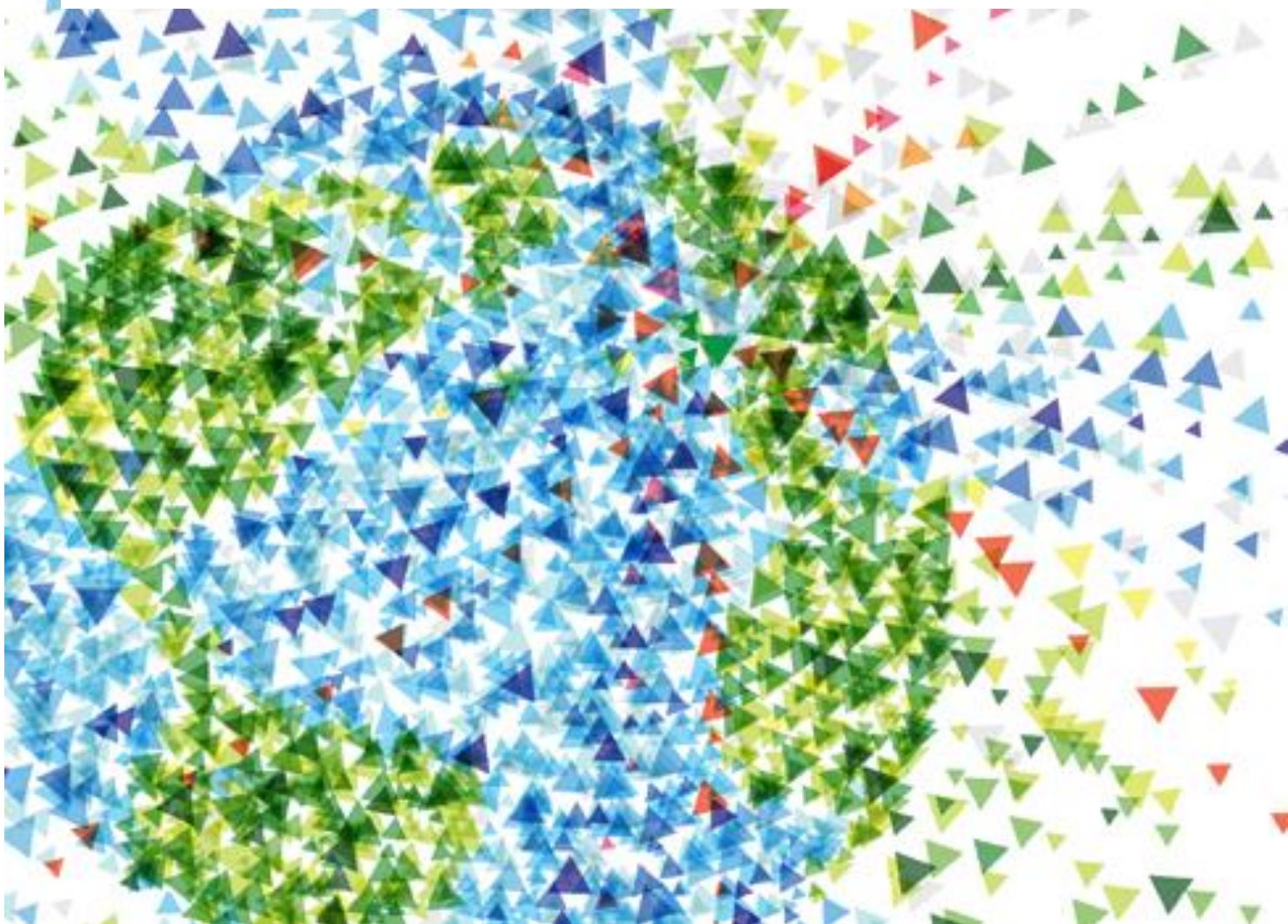
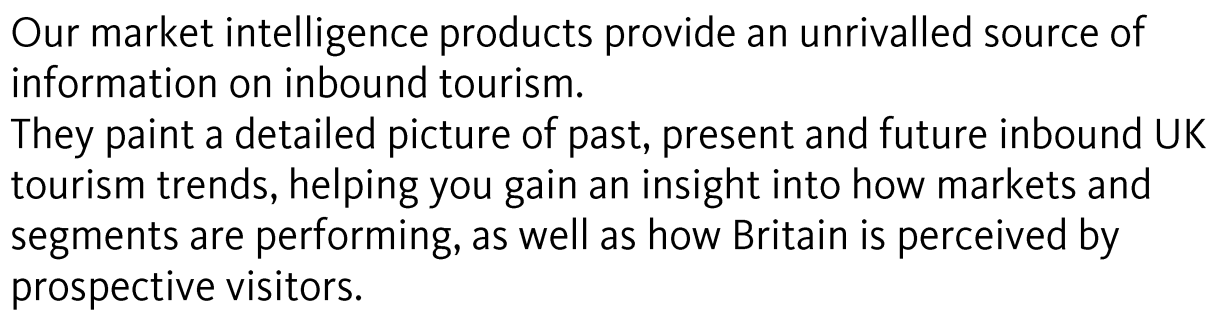
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# Inbound visitors that watch live football

## Introduction

The new football season will doubtless herald delight and despair in equal measure for fans right across Britain, but the Premier League has an appeal far beyond our shores, with matches broadcast live in countries on every continent, and clubs increasingly seeing their fan-base become 'global'.

There is of course no substitute for actually being at a match however comprehensive coverage might be on the internet, television or radio, and one of the activities that international visitors to Britain were asked whether or not they had undertaken during 2014 was 'going to a football match' in order to establish an estimate for the propensity of overseas visitors to watch football during their visit.

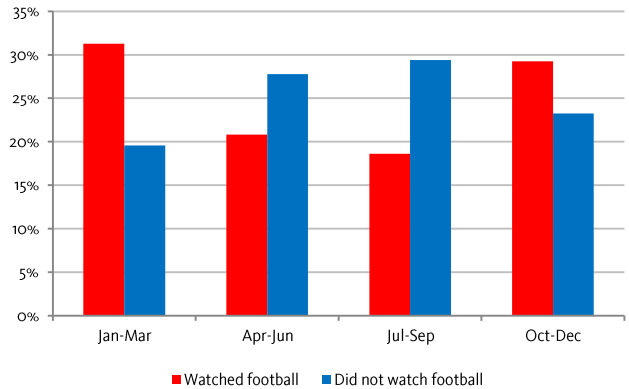
The results from the VisitBritain sponsored question on the Office for National Statistics International Passenger Survey reveal that slightly more than 800,000 inbound visitors went to a football match during 2014, representing about one in every forty-three visitors, and up from around 750,000 when we last asked this question back in 2010.

Total spending (including expenditure on all items purchased during the trip) by those whose trip included 'going to a football match' amounted to around £684m in 2014, with those visitors indulging in football spectating having an average spend per visit of £855, considerably higher than the average for inbound visitors who didn't attend a match at £628. The average length of stay for those including going to a football match in their trip was 10.4 nights, but as we will discuss later this 'average' masks significant variations in length of stay according to the underpinning journey purpose.

## Time of year

Increasingly the gap between one football season ending and the next beginning has diminished, but it is clear from Chart 1 that the proportion of inbound visitors to Britain that go to a football match is greatest in the periods January to March (31%) and October to December (29%), and lowest in the period July to September (19%), meaning that football is a highly effective tool for enticing visitors to Britain at some of the quieter times of year outside the main summer peak season.

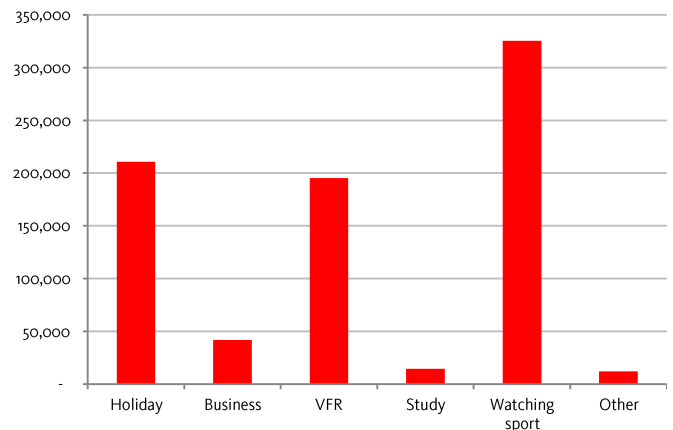
**Chart 1: Propensity to watch football by time of year**



## Trip characteristics

Chart 2 indicates the main reason for visiting Britain given by those respondents who said that during their visit in 2014 they went to a football match.

**Chart 2: Football watching visitors by journey purpose**



It is apparent that around two-in-five of those going to a football match said that the main reason for visiting was to 'watch sport', a clear indication that without the pull of football the tally of inbound visitors last year would have been 325,000, or 1%, lower than it actually was.

Among the remaining visitors who went to a football match the vast majority were here either for a holiday or to visit their friends and relatives. Nevertheless, it is worth noting that more than 40,000 business visitors managed to find time to go to a football

match during their stay.

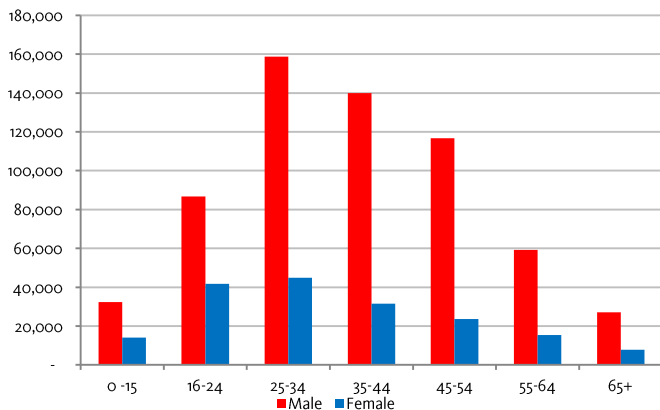
Looking at the same set of numbers but in a different way reveals that of all those visitors who gave their primary journey purpose as 'watch sport' no fewer than 73% also said that they had gone to a football match, confirming that, while there are few forms of sport that cannot be watched in Britain, it is football that is attracting the largest volume of inbound visitors.

There is wide variation in the average length of stay among visitors going to a football match depending on their primary motivation for visiting, with those saying the main purpose of their trip is to 'watch sport' having an average trip duration of 2.5 nights, those visiting for a holiday 9.7 nights and those visiting friends or relatives 15.6 nights. Business visitors who go to a football match have a length of stay more than twice that of their non-football-watching business visitor compatriots.

### Visitor characteristics

Chart 3 highlights that there is considerable variation in the number of visitors who go to watch live football according to age and gender.

**Chart 3: Football watching by age and gender**



For each age-band a far higher number of male visitors than female visitors go to a football match and there is greater variation by age for males than females, with about one-in-twenty males aged 16-24 saying that during their visit they went to a football match compared with just one-in-fifty among males aged 65+.

### Markets

While there are few, if any, countries where football is not a sport generating considerable interest, we can see from Table 1 that there are more football spectating visitors from the Irish Republic than from any other market at 120,000. Norway is the market that is a clear runner-up in the league table with some 93,000 football watching visitors during 2014 ahead of another Nordic country,

Sweden, in third place.

**Table 1: Largest markets for watching live football**

	Visits including live football
Irish Republic	121,000
Norway	93,000
Sweden	58,000
USA	53,000
Netherlands	43,000
Spain	39,000
France	35,000
Germany	34,000
Denmark	33,000
Australia	32,000

While Table 1 considers the 'biggest' markets it is insightful to examine which markets have the highest propensity to include watching live football during their trip to Britain and this reveals a rather eclectic top five, with Norway the front-runner thanks to the fact that 11% of all visits feature football. Malta (9%), Thailand (9%), Iceland (7%) and Sweden (7%) complete the top-flight.

### Where?

Any visitor who said that they had gone to a football match during their visit in 2014 was asked a follow-up question about which stadia they had gone to. We only asked about the stadia of teams that were in the English or Scottish Premier Leagues at some point during calendar year 2014 and the national stadia of England, Wales and Scotland. A minority reported that they had gone to more than one match during their visit, but 85% of the matches that were watched were at one of the stadia included on our list.

Table 2 shows the stadia that attracted more than 30,000 inbound visits during the course of 2014 with Old Trafford and The Emirates needing a penalty shoot-out to separate them at the top with Anfield just missing out on attracting more than 100,000 overseas visits to a match.

Another way in which we can explore the regional data is to look at the likelihood of a visitor going to watch live football according to which area of the country they are in.

Table 3 reveals just how effective a tool football is for encouraging visitors from overseas to explore different parts of Britain. A remarkable one-in-ten visits to the North West of England feature time at a football match, followed by more than one-in-twenty visits to the North East. Wales sees 2.5% of all visits featuring live football placing it fractionally ahead of Yorkshire. The areas where football is least likely to be watch are the South West and South East of England.

**Table 2: Stadia at which live football watched by inbound visitors**

Stadia	Visits
Old Trafford	109,000
The Emirates Stadium	109,000
Anfield	99,000
Stamford Bridge	89,000
Wembley	51,000
White Hart Lane	40,000
Etihad Stadium	33,000
Craven Cottage	30,000

**Table 3: Propensity to watch live football by area stayed in**

	% visits including live football
North West England	10.8%
North East England	5.6%
Wales	2.5%
Yorkshire	2.4%
London	2.2%
West Midlands	2.1%
Scotland	2.0%
East Midlands	1.9%
East of England	1.5%
South West England	1.4%
South East England	1.3%

## Going for promotion

Inbound visitors come to watch football in Britain throughout the season and across the country, facts that more than compensate for the relatively short average length of stay among visitors whose primary reason for visiting is football.

VisitBritain recognises the scale of the opportunity on offer and as a longstanding partner of the Premier League, VisitBritain targets consumers in key markets around the world with its Football is GREAT campaign, showcasing the key destinations behind the Premier League clubs.

Recent activity during the 2014/15 season saw VisitBritain offer potential visitors the opportunity to take part in an inspirational season-long digital competition to win a trip to Britain, hosted on [visitbritain.com/football](http://visitbritain.com/football). This was complemented by a comprehensive Premier League hub, which contains a profile of all 20 British Premier League teams, options to book match breaks via Thomas Cook Sport, information on favourite clubs, suggested football itineraries and tourist attractions close to the stadium, as well as access to latest fixtures and results.

VisitBritain also ran promotional activity with official Premier League broadcasters in five markets worth more than £5.6 million

in Hong Kong, Indonesia, Malaysia, Norway and Singapore; markets, which all demonstrate a strong interest in football and increasing tourism potential for Britain.

VisitBritain has continued to capitalise on the global appeal of the Premier League, which has games broadcast in 175 countries globally, to engage a new audience of football fans.

The new 2015/16 football season is the eighth year of VisitBritain's partnership with the Premier League which will continue to encourage visitors to travel to Britain and enjoy a British Premier League game with the Home of Football campaign. The non-commercial partnership aims to showcase Britain as a welcoming destination for football fans and to attract people from all over the world to attend Premier League games live in Britain.

All of VisitBritain's Football is GREAT activity promotes the destinations behind the Barclays Premier League with regular digital and social media activity taking place throughout the season to highlight the tourism offer in key football regions, such as Wales, home to Swansea City, the North West, North East, Midlands and London. VisitBritain offers the first prize of a trip to Britain for the official Fantasy Premier League game, which is played by more than 3.5 million people around the world.

The celebrity appeal of popular football players and managers are also used to connect with fans overseas and VisitBritain recently released a video with Ryan Giggs, Assistant Manager at Manchester United, who spoke about the ease of travelling around Britain.

VisitBritain encourages visitors to enjoy more than just the game with tickets to stadium tours available on VisitBritain's online shop in 58 countries across the world. If fans can't get a ticket for a game or travel to Britain outside of the football season they can instead enjoy the history of their favourite team, sit in the changing room and go pitch-side where their heroes play at clubs such as Manchester United, Manchester City, Tottenham, Arsenal and Chelsea. With a growing number of football tourism experiences in Britain, from the National Football Museum in Manchester to football-themed hotels in Manchester and Liverpool, there is plenty to engage football visitors in Britain.

## Data Sources

**Table 1: Data sources**

Source	Charts/Tables
Office for National Statistics International Passenger Survey	All Tables and Charts



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