

Football Tourism in the UK Foresight 179

October 2021

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**Background,
methodology
& context**

Close up of a football ©VisitBritain/ Steve Bardens

Background and methodology

VisitBritain sponsors a number of questions each year on the International Passenger Survey to gain a greater understanding of UK's international visitors. This survey is conducted at dozens of ports of exit from the UK (air, sea and rail). In 2019, VisitBritain asked a question to provide information about visitors who watched sports live and what stadiums they went to if they watched Football live:

1. Did you go to watch any of the following sports live?

If football was selected then respondents were asked:

2. Did you go to a stadium in England and/or somewhere else in the UK?
3. Did you go to any of these stadiums in England?
4. Did you go to any of these stadiums in other parts of the UK?

The first question about watching sports live was also asked in 2011. Within this report, there are mentions of trended analysis where relevant. You can read past reports on football tourism on the VisitBritain website where we have a dedicated page to [inbound football tourism research](#) as well as seeing how football compares to other live sports on our [activities undertaken in Britain](#) page.

VisitBritain has a long standing non-commercial partnership with the Premier League which has given VB access to great football related content we can use on our own channels; the opportunity to run fan based competitions with their network of international broadcasters and access to fans in our key markets at fan-based events run by the Premier League. We are currently in planning with them to align objectives and identify how this partnership can support our immediate recovery plans in 2021/2022.

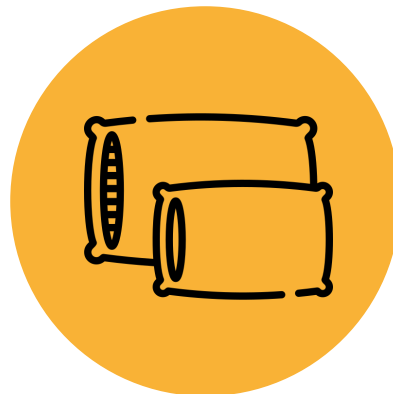


Overview of Football tourism to the UK

How many visitors watched live football in 2019?



1.5 million visits to the UK in 2019 **included watching a live football match**, representing **4%** of all inbound visits to the UK.



These visitors spent **15.7 million** nights in the UK in total, representing **5%** of all inbound nights to the UK



This visitor group spent **£1.4bn** in the UK in 2019, accounting for **5%** of all inbound spend to the UK

What was their trip length and spend?

**10
nights
per visit**

Those who watched a football match spent **10 nights** on average in the UK, 3 nights higher than the average inbound visitor of 7 nights.

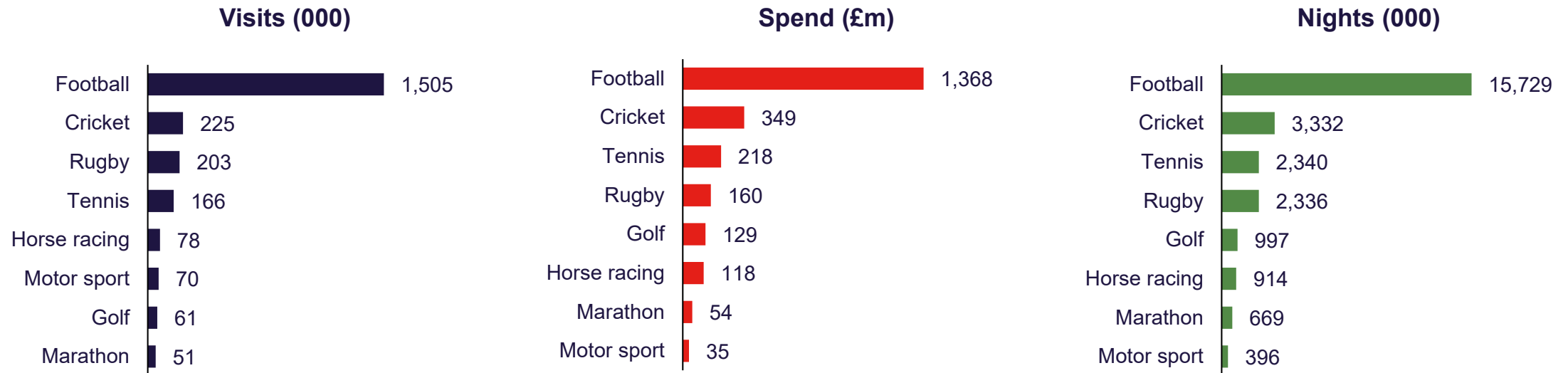
**£909
per visit**

These visitors spent **£909 per visit**, 31% more than the average visitor (£696) showing the high value of these visitors.

**£87 per
night**

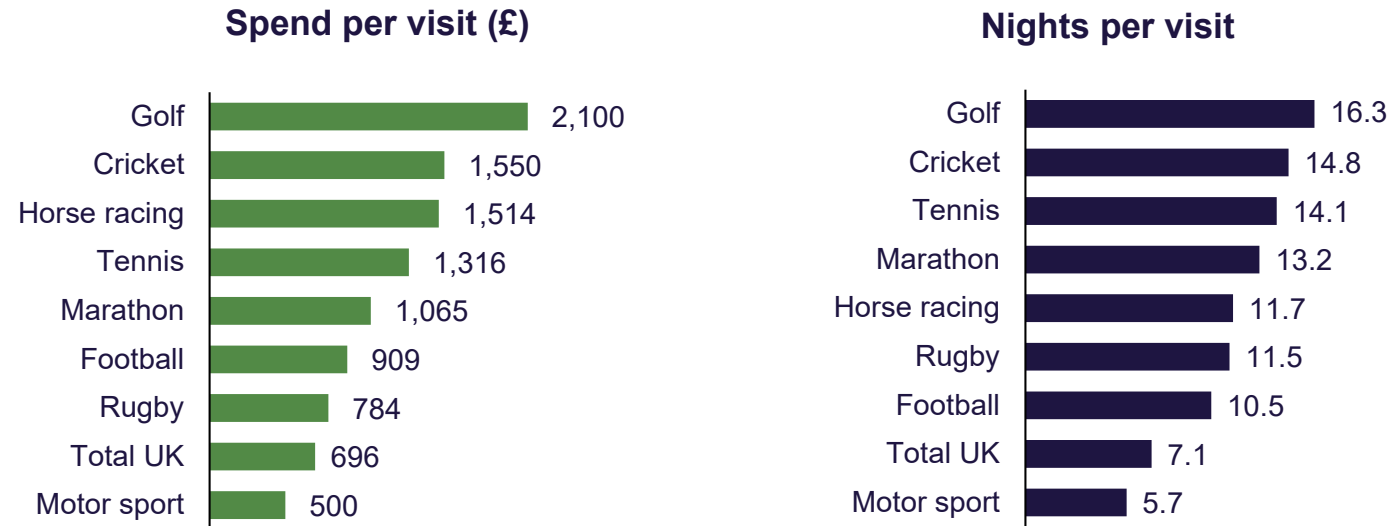
They spent **£87 per night** on average, slightly lower than the global average of £98 per night.

How does football compare to other live sports? (1)



- Whilst there are a variety of live sports that attract inbound visitors to the UK, **live football is the most popular live sporting event**. Cricket also attracted a strong crowd in 2019, supported by the Cricket World Cup which was held in England and Wales. Rugby and Tennis follows whilst visiting the UK to watch golf and marathons brings in the fewest visits in terms of live sports amongst this set.
- **Live football also brings in the most spend**; nearly 4 times more spend than cricket, the next most lucrative live sport. Marathons and motor sports brings in the least spend amongst this set.
- **Football visitors also spend the most nights in the UK**, followed by cricket, tennis and rugby.
- 2% of those who watched football also watched rugby which accounted for around 31,000 visits.
- Of those who watched football, 52% also took time to see the UK's famous monuments/buildings and almost 3 out of 4 visits (73%) included a meal in a restaurant. They were also **more likely to do these activities than the average** showing the increased value these football visitors can bring to the tourism economy.

How does football compare to other live sports? (2)

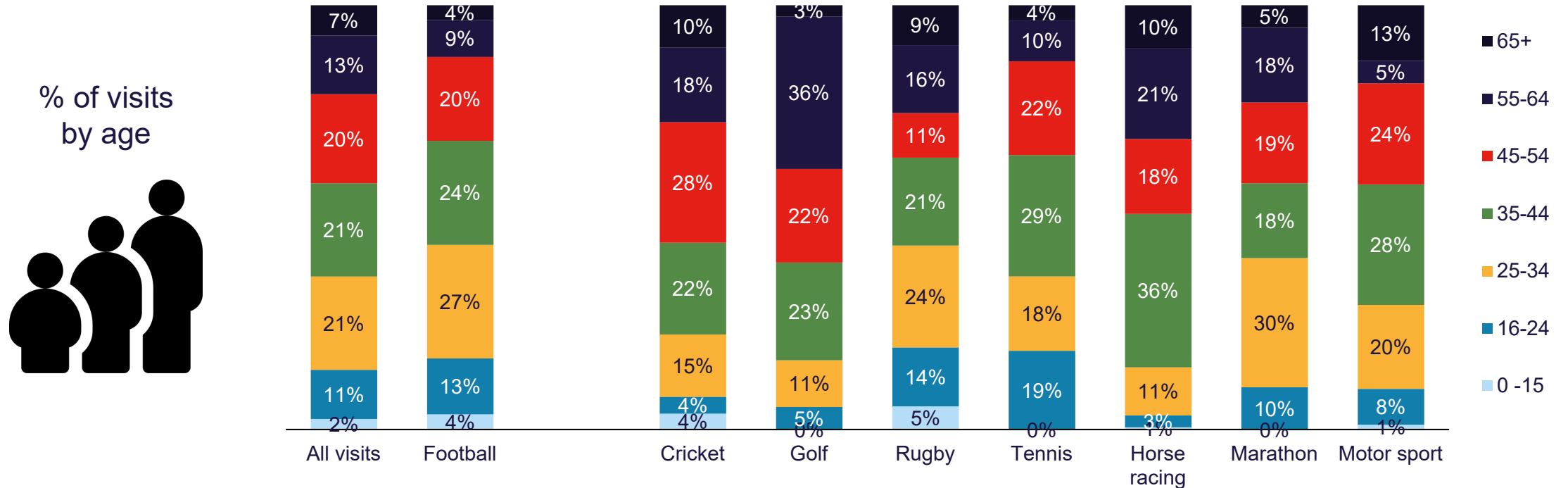


- The ranking changes when we look at the value of live sport per visit. **Live golf attracts inbound visitors who spend the most on their trip at £2,100 per visit**, followed by cricket and horse racing. Those who visit to watch live football spend on average £909 per visit which ranks 6th but is above the average inbound visitor spend of £696 per visit.
- These football fans stay for longer than the average UK inbound visitor; **however, nearly all other sports attract longer stays** with live golf fans staying for the longest on average, around 16 nights per visit.



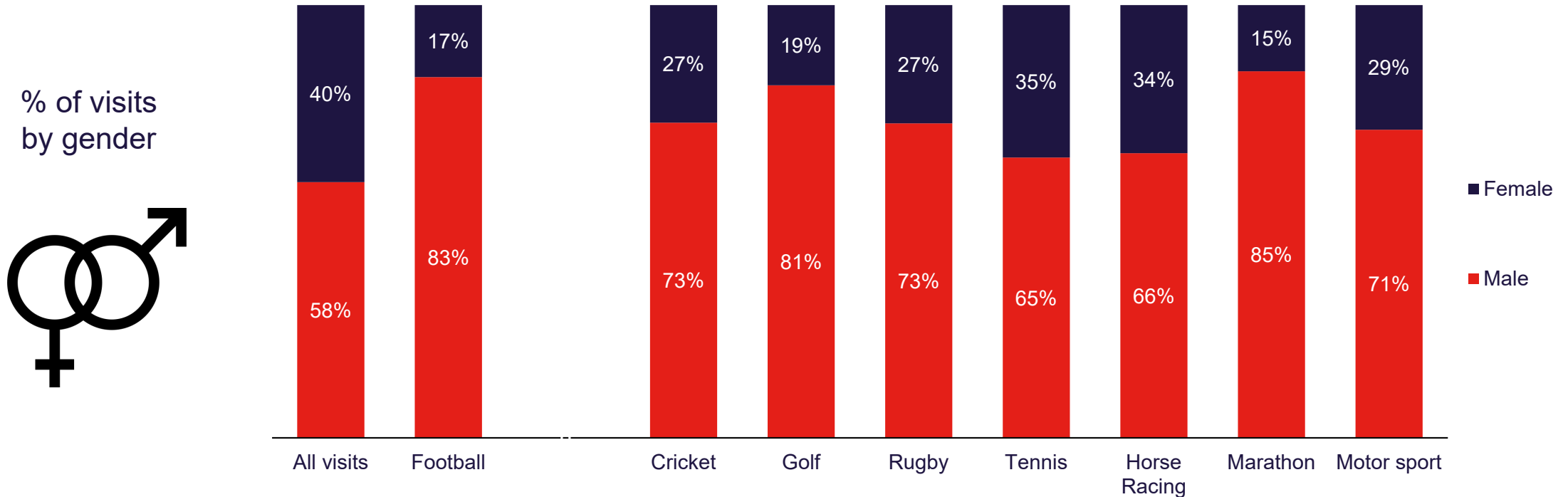
Visitor profile & trends

Visitor profile: Age



- Live football attracts spectators of all ages. Primarily, it attracts a **younger audience** with those aged 25-34 most likely to visit the UK to watch live football (27%); however, 24% are aged 35-44 and 20% are aged 45-54. 13% are also aged 16-24 years.
- Similar to tennis, a smaller older audience is interested in watching live football with only 13% aged 55+.

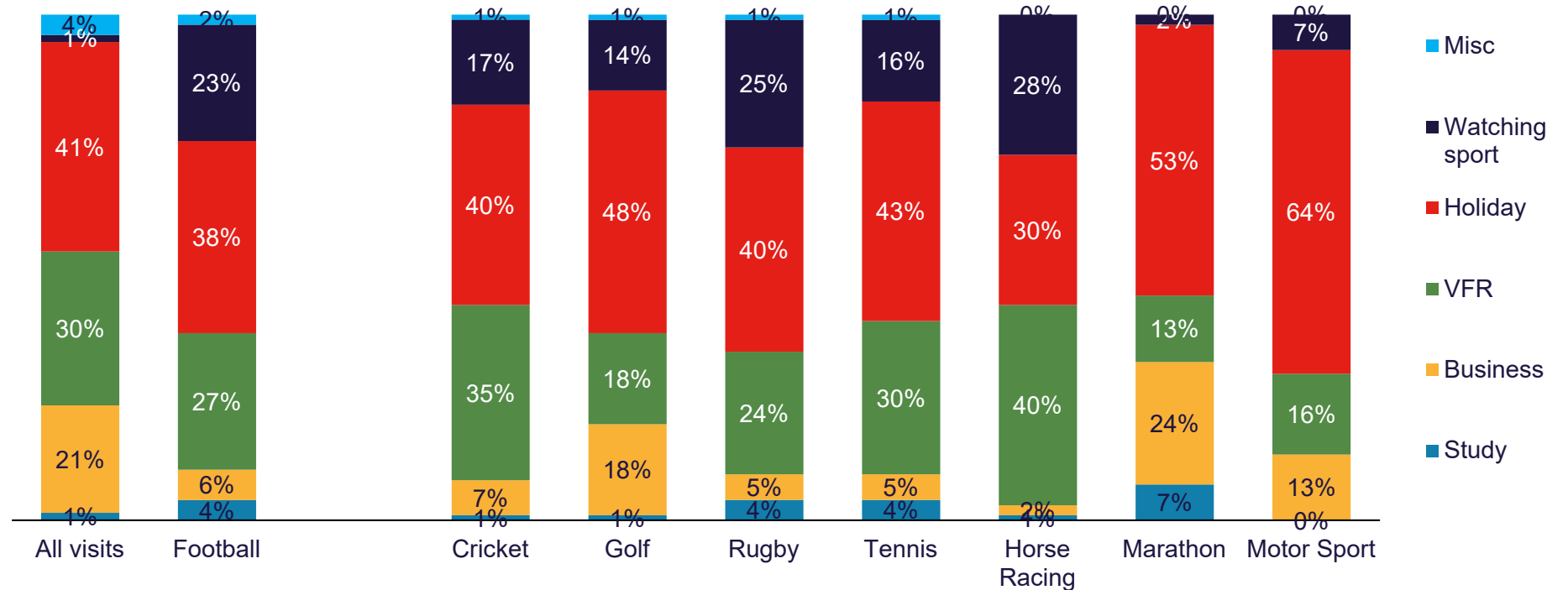
Visitor profile: Gender



- Whilst visits to the UK are more balanced by gender, a significantly **higher proportion of males than females watch a live football match** during their visit – 83% vs 17%.
- This pattern is similar across other live sports as well.

Visitor profile: Journey purpose

% of visits by journey purpose



- Only around **one quarter (23%)** of those attending a football match said that the main reason for visiting the UK was to “watch sport” - 353,000 visits. When we compare this to those visiting to watch other sports, there is a similar proportion amongst those who watch rugby and horse racing.
- Amongst the remaining visitors who went to a football match, the majority were either here for Holiday (38%) or VFR (27%) visits, demonstrating how watching sports can be part of a broader trip for many. 6% were here for business visits which is equal to 94,000 visits inclusive of a football match.
- If we look at the data in a different way, out of all those who said ‘watching sport’ was their main purpose of visiting the UK, 62% said they had gone to a football match. It is clear that **football is attracting the largest volume of inbound visitors amongst those coming primarily to watch sport.**
- Additionally, when we look at individual travel purposes 17% of those travelling for misc purposes (including watching sport) watched a football match whilst 10% of study visits included watching football followed by 3% for VFR and holiday, and 1% for business.

Visitor profile: top markets by visits

Visits
by market



Rank (by visits including live football)	UK rank*	Market	Visits including live football	% of visits from market including live football
1	4	Irish Republic	175,000	6%
2	3	Germany	126,000	4%
3	1	USA	113,000	3%
4	2	France	93,000	3%
5	18	Norway	78,000	12%
6	7	Netherlands	77,000	4%
7	10	Australia	63,000	6%

- The **Irish Republic is the top inbound market for football visits at 175,000, followed by Germany and the USA.** These markets are also amongst the top markets for all inbound visits to the UK.
- **5 out of the top 7 markets are within Europe** likely influenced by proximity and popularity of football in these markets.
- The remaining **2 markets are long haul markets** with the USA in 3rd place followed by Australia in 7th place.
- If we cut the data differently to look at markets which have the highest propensity to include watching live football during their trip to the UK then **Iceland** ranks first, followed by Norway and Kuwait**.** Whilst these are smaller inbound markets, a higher proportion of the market are engaged in football in the UK.

Rank (by % of visits including live football)	Market	Visits including live football	% of visits from market including live football
1	**Iceland	13,000	13%
2	Norway	78,000	12%
3	**Kuwait	18,000	10%

Visitor profile: top markets by spend

Spend
by market

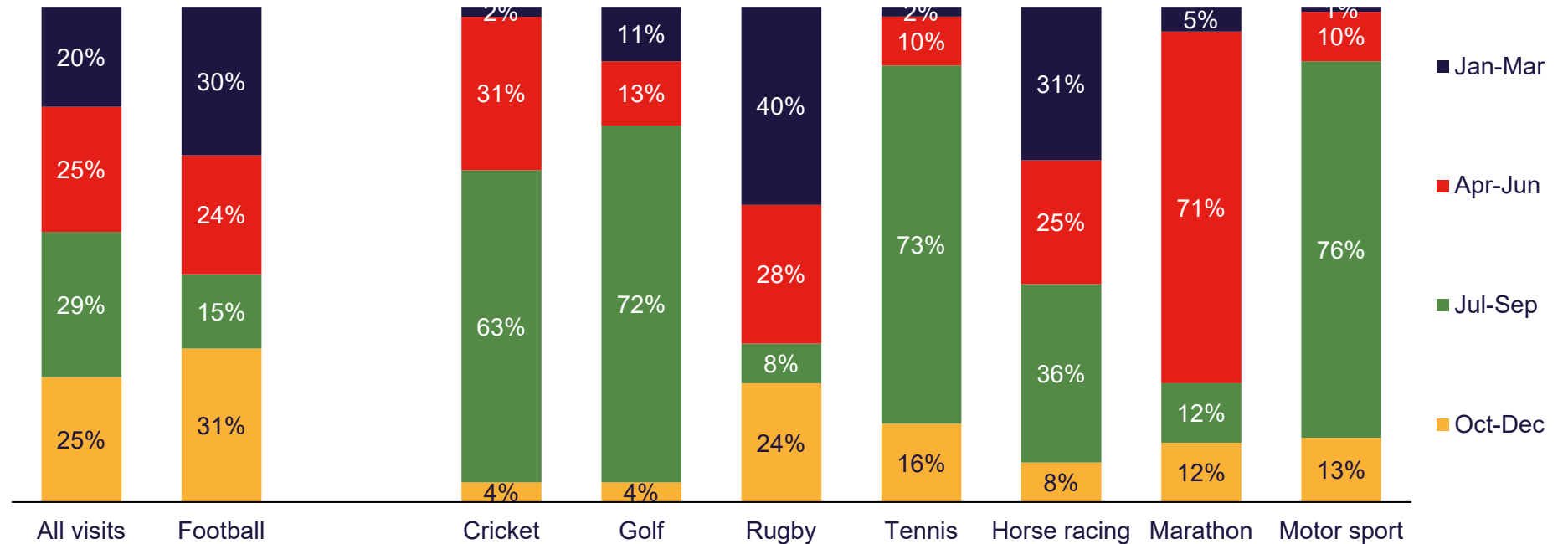
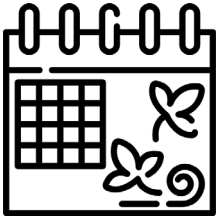


Rank (by spend of visits including live football)	UK rank*	Market	Spend of those who watched live football	% of spend from market including live football
1	44	Qatar**	£118 million	22%
2	1	USA	£115 million	3%
3	2	China	£108 million	6%
4	5	Australia	£101 million	9%
5	10	Netherlands	£63 million	8%
6	9	United Arab Emirates	£55 million	6%
7	3	Germany	£54 million	3%

- The top inbound markets for spend differ slightly to those top for visits. Qatar is the top inbound market for football spend with those visits which include watching live football accounting for £118m spend in 2019, followed by the USA and China – the later 2 are also the top 2 markets for spend for total inbound.
- Other long haul markets also feature in the top 7 including the **Australia and the UAE**.
- The **Netherlands** and **Germany** also feature in the top 7 as they did for visits.
- Due to low sample size this data should be seen as indicative.

Visitor trends: Seasonality

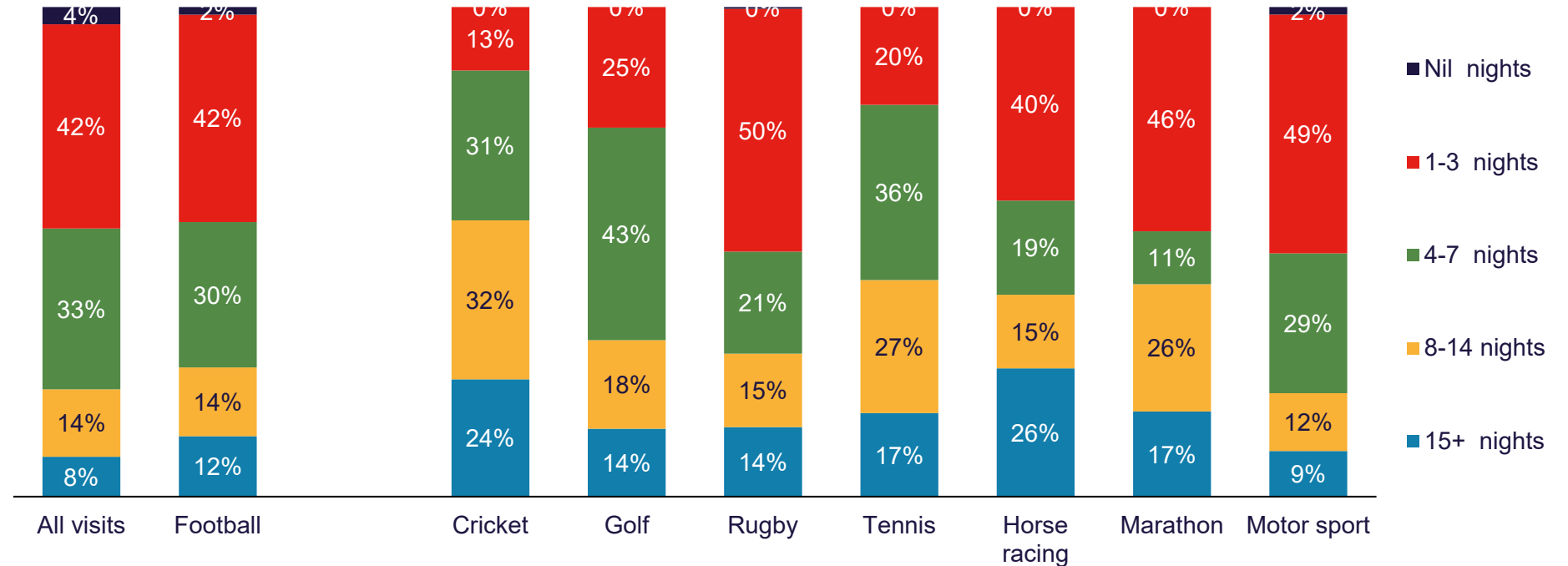
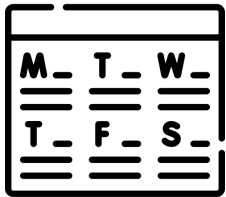
% of visits by season



- The **largest proportion of inbound visitors to the UK attend a live football match during January to March (30%)** and October to December (31%), totalling at just over 910,000 visits. 24% attend a live football match from April to June whilst only 15% do so from July to September, which is usually the busiest time of year when looking at overall inbound tourism to the UK.
- Football tourism is an **attractive proposition for international visitors during the quiet seasons of year**, outside the peak seasons.
- When compared to visits for other sports cricket, golf, tennis and motor sport are skewed towards the summer period, whilst those who watch rugby are more likely to visit during the winter and spring.

Visitor trends: Duration of stay

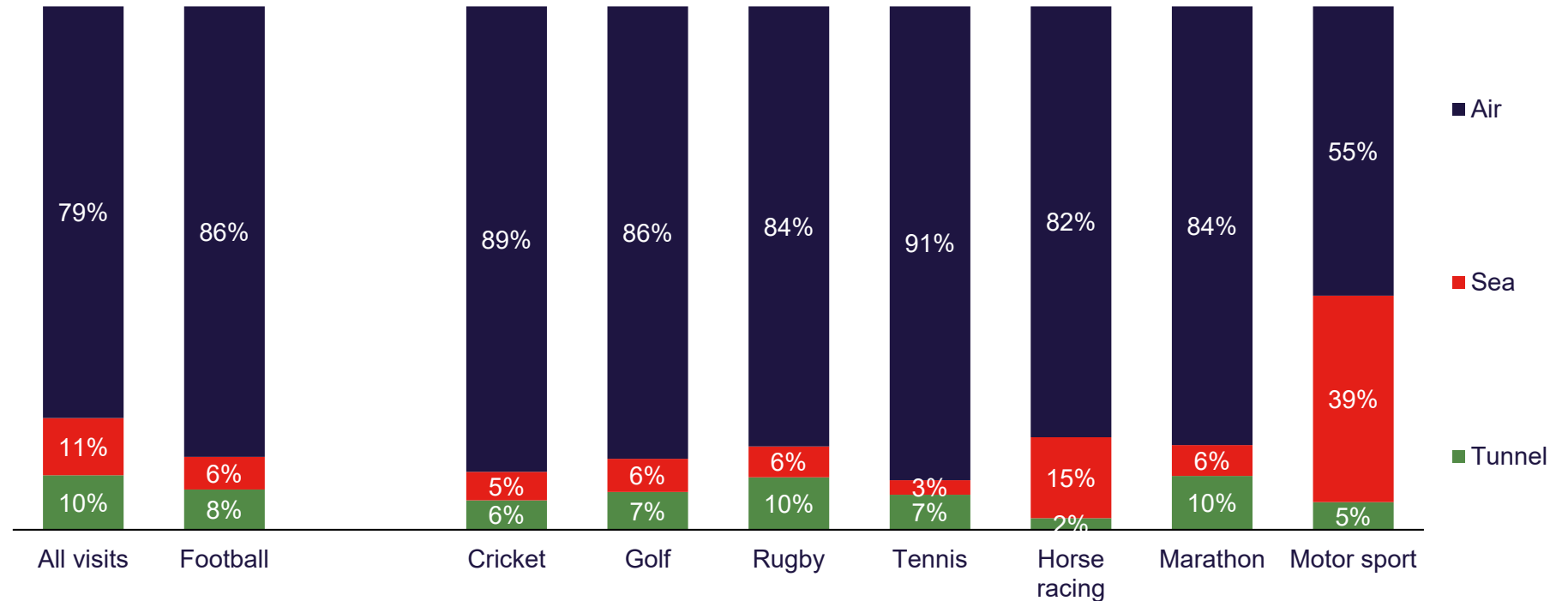
% of visits by duration of stay



- The **largest proportion of those who come to the UK to watch live football stay for 1-3 nights** (42%). However, just under a third will stay for 4-7 nights (30%).
- Less than 2% visit the UK just for the day as **football typically attracts longer stays compared to the UK average** with 12% of this audience staying for 15+ nights compared to the average 8% for the average UK visitor.
- Those who come to watch cricket and horse racing had a higher proportion of longer stays (more than 2 weeks) whilst spectators of rugby, marathons and motor sports had a higher proportion of shorter 1-3 night stays – around half.

Visitor trends: Modes of travel

% of visits
by modes of
travel



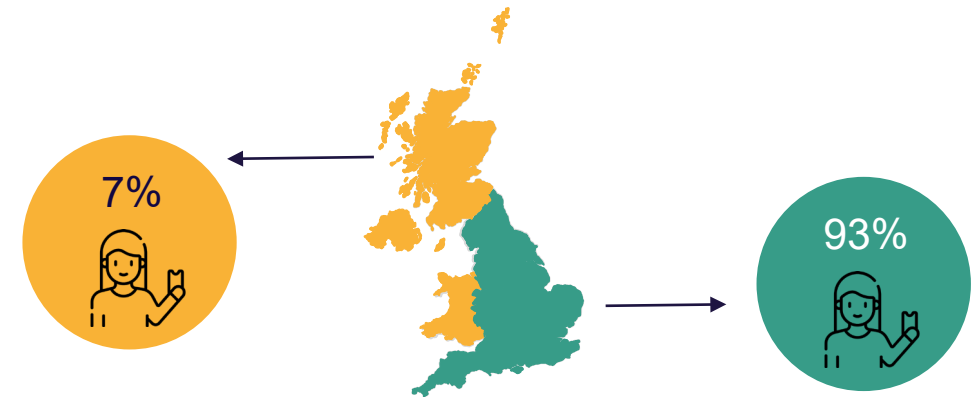
- In 2019, **86% of visitors who came to the UK to watch a football match left the country by plane**; slightly higher than the average UK visitor (79%).
- Fewer travel by sea (6% vs 11%), and by tunnel (8% vs 10%).
- Five of the other sports follow a similar pattern, whereas those who come to watch horse racing are more likely to travel by sea and those who come to watch motor sports less likely to travel by air (55%) with 39% travelling by sea.



Regions and stadiums visited

What stadium did football visitors go to?

Rank	England Stadium	Visits (000)	Spend (£m)
1	Old Trafford	226	£225
2	Anfield	213	£152
3	Emirates Stadium	189	£269
4	Wembley Stadium	122	£133
5	Tottenham Hotspur Stadium	114	£114
6	Stamford Bridge	107	£129
7	Etihad Stadium	87	£63
8	London Stadium	65	£56

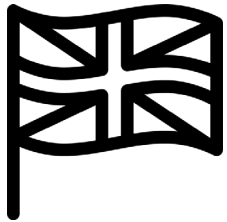


- These stadiums are all those who welcomed more than 30,000 inbound visits in 2019.
- **Old Trafford** in Manchester was the top stadium for overseas football fans with 226,000 visits in 2019, followed by **Anfield** in Liverpool which attracted 213,000 inbound visits.
- Emirates, Wembley, Tottenham Hotspur and Stamford Bridge also attracted larger audiences of over 100,000 inbound visits in 2019.
- In 2019, **93% of visits (or 1.4m visits) that included watching football live included a trip to a stadium in England while 7% of visits (or 107,000 visits) included a trip to a stadium in Scotland, Wales and Northern Ireland.** The same proportions were seen with visitor spend.
- Around 290,000 visits to watch live football did not include a trip to any of the stadiums that were shown to respondents. Around 8% of those watching live football went to more than one stadium.
- Due to the survey methodology these numbers should be regarded as indicative rather than exact visitor numbers.

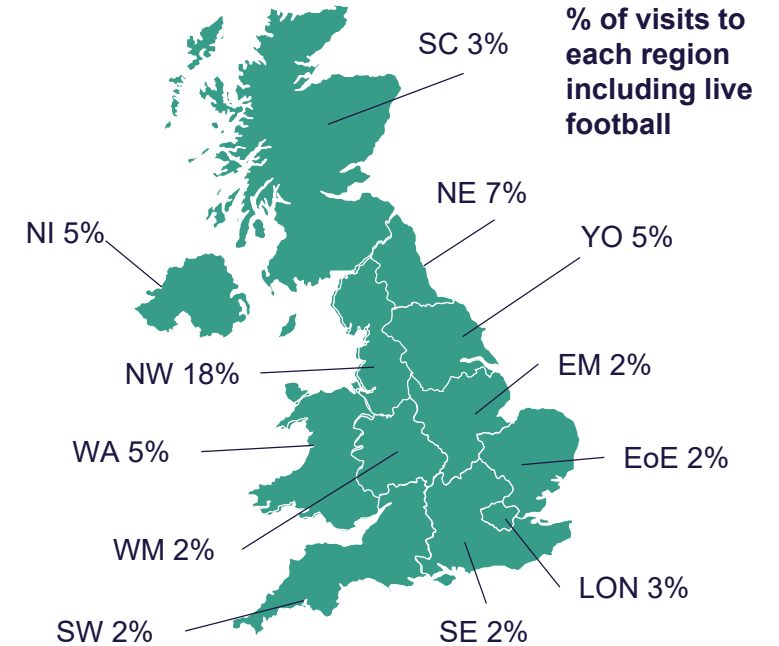
Respondents were showed a list of the English Premier League and Scottish Premiership stadiums from 2018-2019 plus the four national stadiums in the UK. Only stadiums with sample greater than 30 shown here. Visits from stadiums do not add up to the total football visits figure as some visits included a trip to 2 stadiums. Spending refers to total spending on trip (excluding transport costs getting to the UK).

Visitor trends: football visits per region

% of visits by UK region



Rank	Region	Visits including live football	% of visits to each region including live football
1	London	492,000	3%
2	North West	376,000	18%
3	South East	59,000	2%
4	Scotland	52,000	3%
5	West Midlands	48,000	2%
6	East of England	46,000	3%
7	Yorkshire	35,000	5%
8	South West	21,000	2%
9	North East	21,000	7%
10	East Midlands	17,000	2%
11	Wales	12,000	2%
12	Northern Ireland*	3,000	2%



- Football is an effective medium for encouraging inbound visitors to explore different parts of Britain due to the location of stadiums. When we look at regional data for our sponsored questions, we can only look at those who stayed in only one area on their trip to the UK (i.e. excluding those that may have stayed in multiple areas).
- Using this method, we can see that **London attracted the largest volume of visitors who watched a football match**, followed by the North West and South East.
- However, when we look at football visits as a proportion of the region, we can see almost **1 in 5 visits to the North West – home to a number of leading clubs – included watching live football**. The North East saw 7% of all visits featuring live football, followed closely by 5% in Yorkshire.
- Whilst all other areas attracted football fans, Wales and Northern Ireland attracted the fewest.

Analysis on this slide includes visitors to the UK who only stayed in one region. *sample below 100, use with caution



Summary

Summary

- **Football is a huge draw for the UK** with over 1.5 million inbound visits in 2019 including watching a live football match. This was up from around 909,000 visits in 2011 indicating the increasing popularity of the sport.
- This visitor group spent a total of £1.4bn in the UK in 2019 and their spend per visit was £909, 31% higher than the average UK visitor showing their **high value to the UK economy**.
- Watching **live football is also the most popular sport of choice** for those choosing to watch live sport in the UK bringing in nearly 4 times more spend than cricket, the next most lucrative sport.
- The audience is 83% male vs 17% female and **primarily attracts a young audience** with 27% aged 25-34. However a further 44% are aged 35-54 years but fewer are aged 45+ when compared to those who watch other live sports.
- Football is an **attractive proposition for international visitors during the quieter season** of the year, unlike the majority of other sports which tend to attract visitors during the summer period. The majority attend live football matches in Jan-Mar (30%) and Oct-Dec (31%).
- This audience is most likely to arrive by plane (86%) and **stay for 1-3 nights** (42%) in the UK. However, overall, football fans do **stay for longer when compared to the average UK inbound visitor: 10 vs 7 nights**.
- The majority of the top markets for football visits are within Europe with the **Irish Republic and Germany attracting the most visitors**, however **Iceland and Norway have the highest propensity to watch live football** on a trip to the UK. The football offering is also **appealing to long haul markets** with over 170,000 visits from the US and Australia including a trip to see live football in 2019. And by spend, Qatar is the top inbound market for football spend, followed by the US, China and Australia.
- Those who watched football were also interested in doing other activities with around half also visiting famous monuments/buildings in the UK and three quarters dining in restaurants. There is **opportunity to promote more activities** to those who stay longer and also extend the stay for those who only stay for 1-3 nights.
- Whilst London attracted the highest volume of visitors who watched a football match, the most popular stadiums were in Manchester and Liverpool putting the **North West on the map as an attractive destination for football**, whilst also promoting regional dispersal.

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