



VisitBritain™

Foresight

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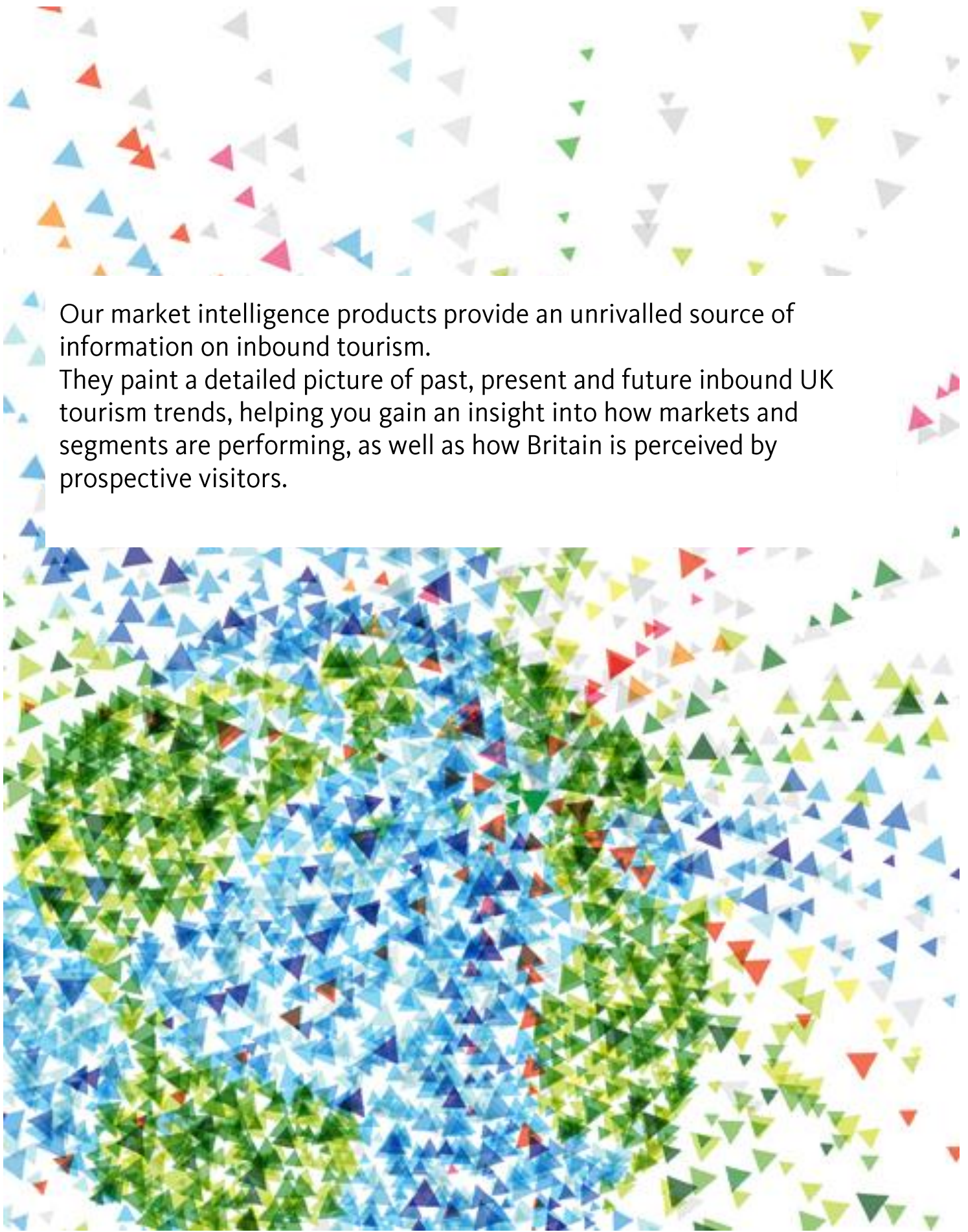
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The background of the page is a dense, abstract pattern of small, colorful triangles. The triangles are in various shades of blue, green, yellow, red, and grey, scattered across the entire page. The pattern is more concentrated in the top and bottom sections, with the text area in the middle being a plain white background.

Our market intelligence products provide an unrivalled source of information on inbound tourism. They paint a detailed picture of past, present and future inbound UK tourism trends, helping you gain an insight into how markets and segments are performing, as well as how Britain is perceived by prospective visitors.

Inbound visits that include going to live sport

Introduction

Lord's, Old Trafford, Wimbledon, Ascot, Millennium Stadium, St Andrews... the list of venues where Brits and overseas visitors alike can savour live world-class sporting action stretches across the length and breadth of Britain. Later in July 2012 further state-of-the-art sporting arenas will be added with the opening of the Olympic Park, containing not just the Olympic Stadium, but a new VeloPark, Aquatics Centre and much more.

The chance to watch live sport is a vital asset in attracting overseas residents to Britain. A VisitBritain sponsored question included in the 2011 International Passenger Survey asked departing visitors whether or not they had undertaken a range of different activities during their stay.

Among these activities was 'Going to live sports events'. The survey found that around 1.3 million visits, that's 4% of all visits, featured going to a live sports event, with the total amount spent by this group (including expenditure on accommodation, food, entertainment and so on) reaching £1.1bn.

The average amount spent on a visit that included going to a live sporting event was £850, markedly higher than the average for those visits that did not feature this activity (£570) though this difference was driven by longer duration of stay among those watching live sport than those who did not (11 nights versus 7 nights) rather than any variation in the amount spent 'per night'.

Visit characteristics

Seasonality

One of the best things about Britain's sporting offer is that no matter whether it is March, July or November there is always something worth watching, and it is clear from Chart 1 that while the time of the year generating the greatest volume of visits to live sporting events is April to June, the time of the year seeing the greatest propensity for a visit to include this activity is January to March.

Journey purpose

Chart 2 highlights that of those reporting having gone to a live sports event during their stay in Britain 35% cited their primary journey purpose for being in Britain as 'Watching sport', while slightly more than one-in-four were in Britain primarily for a Holiday and almost as many to spend time with friends and family.

The average length of stay for those going to live sports has already been made mention of at 11 nights, but there is

considerable variation dependent upon the primary reason for the trip, with the average for those on Holiday being 9 nights, those visiting family 15 nights but for those in Britain primarily to watch sport it was much lower at 3 nights.

Chart 1: Number and proportion of visits going to a live sports event by season

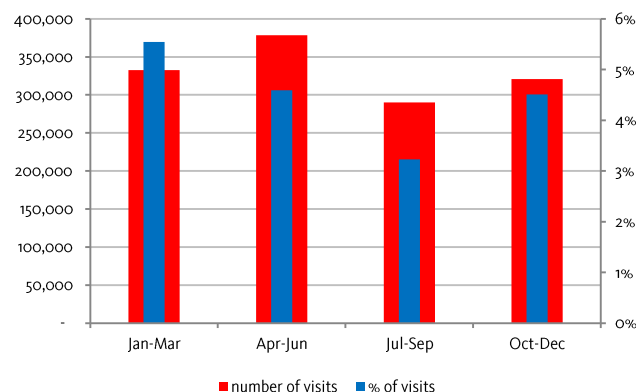
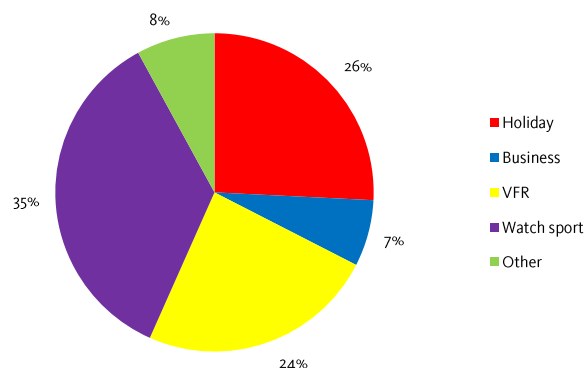


Chart 2: Distribution of visits going to a live sports event by journey purpose

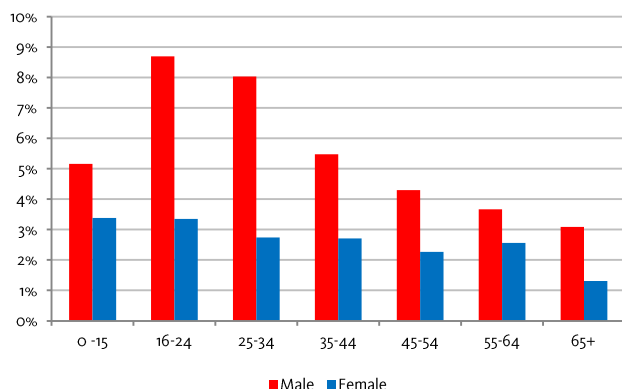


Visitor characteristics

Demographics

Looking at the propensity of visitors to go to a live sporting event according to their age and gender tells a not entirely unsurprising story (Chart 3), with the group most likely to engage with the activity being males aged 16-24 (with 9% doing so) and the group having the lowest propensity to watch sport being females aged 65+ (just 1% doing so).

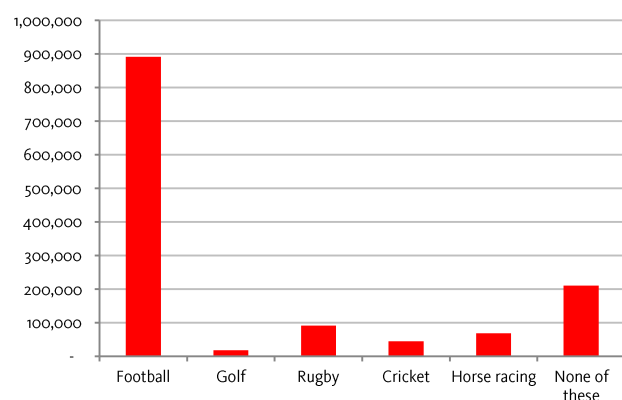
Chart 3: Proportion of visits going to a live sports event by age and gender



Football crazy

Those surveyed that said they had been to a live sports event were asked whether it was one of five specific sports and it is evident from Chart 4 that by far the most popular sport to watch was football, with almost 900,000 inbound visits doing so during 2011. There was little to choose between the numbers watching rugby, cricket or horse racing, while more than 200,000 watched a live sporting event that was not one of the five listed sports.

Chart 4: Numbers going to different forms of live sports event



Market variation

As one would expect visitors from different countries portray different levels of interest in the types of live sport that Britain can offer and the following sections explore those most likely to be found at each type of sporting event.

Football

Out of the near 900,000 inbound visits featuring time at a football match during 2011 the market generating the largest contribution was the Irish Republic at 174,000 visits. In second spot in volume

terms was Norway with more than 80,000 visits.

Another way at looking at the results is to explore which markets had the greatest propensity to go to a football match and this indicates that an estimated 12% of all visits from Norway featured the activity, and while not quite at the same levels it is clear that across the Nordic region Britain is a popular destination for football fans, with an above average tendency for those from markets such as Denmark, Sweden and Iceland to take in a spot of football.

Around 7% of all visits from the Irish Republic include going to a football match while at the other end of the spectrum only around 1% of visits from markets such as France, Italy, India and Japan included the activity.

Golf

The International Passenger Survey picked up relatively few visitors who reported having watched live golf (as opposed to having actually played golf themselves) with the market generating the greatest volume of golf spectators being the USA.

Rugby

Rugby is somewhat less universal as a sport than is football, but is of interest to a rather broader spectrum of visitors than is cricket. In 2011 France and Ireland led the way in generating rugby spectating visits, spurred on no doubt by the fact that a number of rugby tournaments feature teams from these countries as well as those whose home fixtures are played in England, Scotland or Wales.

When looking at the propensity of those from different markets to go to a live rugby fixture it is another rugby playing nation that sees the highest figure, though admittedly still only 2% of all visits, namely New Zealand.

Cricket

No surprises to find that more visits from Australia than from any other market head for the sound of leather on willow while in Britain, but at first sight a somewhat peculiar result is that residents of France are the next largest contributor to the cricket watching fraternity from overseas, but it is important to recognise that a substantial minority of visits from France (15%) are by those with British nationality, and it may be these visits that are helping generate visits to cricket grounds alongside some truly French visitors curious to experience the game.

Horse racing

Horse racing is a global sport from Asia Pacific, through the Middle East to the Americas, and although numbers are comparatively small the International Passenger Survey picked up visitors from numerous markets in 2011 who had gone to watch

horse racing.

One market really stands out from the crowd however, and this is the Irish Republic, being the market accounting for the largest volume of visits featuring horse racing and the market with the highest propensity for a visit to feature the activity.

The Cheltenham Festival and Grand National at Aintree are strongly associated with visits from Ireland, but the plethora of racecourses across Britain and the ease with which they can be accessed from Ireland tends to suggest that these are not the only destinations to benefit from an influx of horse racing fans from across the Irish Sea.

Perceptions

How does the world see Britain in relation to sport? Each year one of a battery of questions that gets asked about Britain and many other nations on the Anholt GfK Nations Brand Index Survey relates to sport, with respondents invited to state how far they agree with the statement 'The country excels at sports'.

In 2011 Britain was ranked 5th out of fifty nations on this measure, clearly signalling that Britain is already held in high regard for its sporting prowess.

Respondents in Australia and South Korea were those to rate Britain most highly (3rd) on this measure, whereas those in Latin American markets and Turkey rated Britain less favourably.

Unrivalled opportunities

Britain is no stranger to hosting major sporting events, with hundreds of thousands going to football matches each weekend during the season, an F1 Grand Prix, The Lawn Tennis Championships, The Open and much more.

There is no doubt, however, that 2012 is an exceptional year, with the Olympic and Paralympic Games set to be beamed across the globe to a potential television audience measured in the billions, from Beach Volleyball on Horse Guard's Parade, sailing at Weymouth, rowing at Windsor through to showpiece athletic events in the Olympic Stadium.

This is just the start of an extraordinary period for Britain hosting the world's elite sportsmen and sportswomen, and of course those keen to come and support their efforts; the Rugby League World Cup in 2013, the Glasgow Commonwealth Games and Ryder Cup in 2014, the IRB Rugby World Cup in 2015, the World Athletics Championship in 2017 and the ICC Cricket World Cup in 2019 are all set to ensure that while the Olympic movement will be turning its attention the Brazil for the next Summer Games, Britain will remain centre-stage when it comes to sport.



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