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# WELCOME

## **Welcome to The Football League Supporters Survey 2010.**

This is the third time that we have conducted this groundbreaking supporter consultation and, once again, supporters of all 72 Football League clubs have responded positively to our invitation to tell us what they think about their club, the league they play in and the state of modern football. I am delighted to report that 36,822 fans contributed their views. Thank you, all of you, for making the effort to take part. Your views are very important to The Football League and we will study them closely.

As in both previous surveys, we have employed modern, online survey methods to reach a mass audience of football supporters. No other domestic sporting governing body regularly engages with such a large body of fan opinion on such a wide range of issues. I would like to thank our partners in this exercise - sports research specialist Sportswise - for their contribution.

This year we asked supporters a range of questions about the football they watch and the team they support. This information will be shared with clubs, who will each receive a report detailing the views expressed by their own supporters. This will help to further develop the shared best practice culture that is taking our clubs forward.

As in 2006 and 2008, we have also taken the opportunity to ask supporters about the wider issues facing the game. Views expressed by fans in previous years on issues as diverse as the role of agents, sin-bins, home grown players and smoking at matches have all helped shape Football League policy in these areas. I expect the information contained in this report to be equally influential in this regard.

I hope you find this report interesting and useful.

### **Greg Clarke**

Chairman  
The Football League



 **THE FOOTBALL LEAGUE**

# EXECUTIVE SUMMARY

The Football League Supporters Survey 2010 further underlines The League's commitment to fan consultation and market research. It represents a continuation of the process begun back in 2006 and repeated in 2008. Whilst some of the topics covered this time around are entirely new, a number help to update the findings of two and four seasons ago.



## METHODOLOGY

01

As in 2006 and 2008 this year's survey adopted an online methodology inviting supporters that had registered on official sites to participate in this consultation. In addition, survey links and related news articles were placed on The Football League's website and club websites to encourage further participation across the entire fanbase.

A total of 314,522 e-mails were sent out to registered supporters via the FL Interactive database and 36,822 completed the survey between December 2009 and January 2010.

Overall 42% of respondents support Championship clubs, 43% League 1 clubs and 15% League 2 clubs.

Leeds United delivered the largest sample with 5,312 fans taking part. Charlton Athletic, Huddersfield Town, Newcastle United, Nottingham Forest, Sheffield United, Southampton and Watford all provided more than 1,000 respondents.

All Football League data has been weighted to reflect the average attendance at each club and it is therefore a truer reflection of Football League support.

## CLUB AND COUNTRY

02

Just over half of our sample described themselves as season ticket holders (52%) whilst a further one in ten (20%) attend ten or more matches per season. A further 21% attend less than ten times a season and a sizeable group (5%) did not go to games at all, a trend repeated from previous surveys.

Nearly two thirds of fans (65%) were aged 11 or under when they attended their first live match. Barely one in ten were 20 or older. The main reasons why supporters began supporting their club were because it was their local team (65%) and parental influence (45%). Around eight in ten consider football to play an important part in their family's life with that figure rising to nine in ten amongst those who actually attend matches with their family.

The main motivation behind season ticket purchase is demonstrating loyalty to their club (35%), this figure increases to around 50% of those under the age of 25 compared to 29% for those 25 and older. Other popular reasons are the guarantee of a ticket for every match (25%), saving money (19%) and the ability to sit in the same seat (13%).

The main barrier to season ticket purchase remains the inability of those fans to get to every match. However, price has become a more significant reason than 2 years ago (31% compared to 24%).

When asked what might encourage them to go to more games, fans unsurprisingly chose cheaper tickets as the most popular answer. Interestingly, whilst better results on the pitch was the next highest placed answer it was only fractionally ahead of more entertaining playing style, indicating fans care almost as much about watching good football as actually winning.

Having asked in previous surveys whether fans thought tickets were too expensive, the 2010 survey asked whether they felt tickets represented value for money. In total, 93% of season ticket holders felt they were getting good value along with 70% of match ticket purchasers.

On the whole fans felt valued by their club giving them an average rating of 6.3 on a one to ten scale. The number having reason to complain to their club remained identical to 2008 at 12%.

The most popular source of information on clubs were Official Club websites (55%) followed by unofficial websites (21%) and local newspapers (8%). Fans of League clubs continue to recognise the importance of their club playing a wider role in their local area with 96% considering community work to be important or very important.

Following the national team was also important to supporters with 92% following the England team in person or on television. Hopes are high for the summer's World Cup with 51% believing England will make it to the semi-finals at least and 11% believing they will lift the famous trophy.

## THE FOOTBALL BUSINESS

03

All of The League's key commercial partners showed an increase in supporter awareness with Coca-Cola leading the way (67%) and Johnstone's Paints enjoying a rise from 35% in 2008 to 47% this time around.

Supporters demonstrated a high awareness of their club's shirt sponsor with almost 9 in 10 (87%) being able to recall the name of their club's main commercial partner unprompted. And as many as one in three fans indicated that they would be more likely to buy a company's products or services over those of its competitors if they had a financial arrangement with their club.

Fans also indicated an interest in club affinity schemes (46%) and hospitality packages (51%).

## GOING TO THE MATCH

04

Seven out of ten fans were positive about their club's ticketing operation. Their attitudes to a range of factors such as pricing, ease of purchase, attitude of ticket office staff and range of ticket options were all more positive than negative. These results underline the good work League clubs are doing in terms of raising the standards of customer service.

In terms of ticket purchase, there has been a sharp increase in the use of the internet since 2008 with 27% of fans buying tickets online compared to 17% two years ago. This is now more popular than any other method including buying tickets on the day (21%). For some individual clubs the figure was as high as 71% for online purchasing.

This time around, fans were also asked what methods of ticket purchase they would be interested in using and six in ten expressed an interest in online, print at home tickets.

The average number of matches attended was 17 home games and 6 away games per season (up from 16 and 5 in 2006 and 2008). The most important elements of the match day experience to fans were entertaining football (8.6 out of ten), a good atmosphere (8.5), clear sightlines (8.5), safety (8.2) and winning (8.2).

Fans were generally complimentary about the facilities that clubs provide on match days although there would still appear to be room for improvement in the standards of food and drink.

There is a strong level of awareness for The League's 'Enjoy the Match' campaign which seeks to eradicate anti-social behaviour in family areas of grounds. Almost half of supporters are aware of the campaign (47%), a figure that rises to 62% amongst those who watch matches in family areas. The rationale for Enjoy the Match is demonstrated by the fact that bad language deters one in five people with children under six from taking their kids to football.

## FOOTBALL AND TELEVISION

05

Unsurprisingly fans of Football League clubs have an insatiable desire to watch football on television too. The vast majority (91%) watch matches at home but many (53%) go to the pub for matches too.

The preferred times for watching live matches are Sunday afternoon (43%), Saturday evening (35%) and Monday evening (31%), with fans being more open to more flexible scheduling the younger they are.

As many as 1 in 8 supporters (13%) would be deterred from watching their clubs matches if they clashed with a televised match. This figure underlines the challenge facing Football League clubs in filling their grounds for midweek matches against a backdrop of more and more televised matches in European competitions.

The 2010 Survey records an interesting development in viewing habits with nearly one in five (17%) fans now watching matches via the internet. The survey also asked whether fans would be interested in a subscription service that would give them the opportunity to watch their club's away matches online. Whilst it should be stressed that The League has no current plans to introduce such a service it was notable that 41% of fans expressed an interest.

## THE FOOTBALL LEAGUE

06

The majority of fans (55%) believe The Football League does a good job, up by 4% since 2008. And 44% believe it has the interests of supporters at heart, although 22% remain unconvinced. Seven in ten fans agree or strongly agree that league matches provide good family entertainment.

Asked to identify what The League's priority for the future should be fans indicated ensuring the long term financial survival of its 72 member clubs (45%) should be the focus, something they view as being distinct from just raising revenue, with just 6% believing this should be its main aim. Elsewhere 18% felt that The League's key role should be ensuring fair competition between clubs and 13% developing young playing talent for the future.

The 2010 survey took the opportunity to ask fans about salary and squad caps and 56% of supporters indicated that they would support the use of such a system in league football. One in three (34%) felt the best system would be a set financial figure (e.g. £3m), whilst 29% preferred a licensing system in which clubs demonstrate they are 'fit to trade' and 25% favoured a system based on a percentage of turnover.

This season The Football League introduced its new Home Grown Players Rule requiring clubs to field 4 players in their 18 man match day squads that have been registered domestically for at least three seasons before their 21st birthday. The results of the survey reveal that supporters continue to back the policy and, on average, would like to see this threshold increased to five players.

Asked to assess the performance of their own club in the area of Youth Development there was, perhaps unsurprisingly, a range of views. Whilst some clubs had 99% of their fans rating their efforts as either good or very good others had less than a third doing so.

The number of fans who feel that the standard of refereeing is either good or very good has increased to 26% (from 20% in 2008) and 21% of fans feel the standard is improving with a similar number believing it is not. Once again fans support the use of technology by match officials with 86% in favour although there remains considerable disagreement over what form that assistance should take.

A similar proportion (88%) would also support the use of retrospective action by the game's authorities against players that have been shown on television replays to have dived. And 48% would like to see the use of sin-bins trialled.