

## Executive Summary: The Televising of Football

The survey gives an insight into football fans' attitudes towards television – particularly the effects of the increasing power of television broadcasters on changing kick-off times and football fans viewing experiences, predominantly match-day attendances.

### 1. THE SURVEY SAMPLE

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- The survey consists of the views of 1029 on-line football fans - predominantly match attendees with a strong weighting towards season-ticket holders but still displaying a good distribution from those fans who attend a few matches to those attending no more than 20 games per season.
- Almost 60% of respondents subscribe to satellite or cable TV in order to watch football – an indication of the high consumption rate of football by fans involved in the survey. This compares to around 20% of UK homes who subscribe to each of Sky Sports 1, 2 & 3 (the channels on which the majority of domestic football is shown).
- Of the estimated 24.6m TV homes in the UK, 6.6 million homes subscribe to Sky of which around 5m subscribe to each of Sky Sports 1, 2 & 3.
- Each age range between those 16 and 55 were well represented, the survey respondents were predominantly male and there was wide geographical participation. The survey exhibited a good distribution of respondents living in a broad range of distances from the stadium of the club they support - a quarter of the sample live within 5 miles of the ground yet almost 1 in 10 live over 200 miles away.
- In all fans of 102 clubs were represented and there was a good spread between the four professional divisions in the English League.

### 2.1 RESULTS OVERVIEW: THE KEY ISSUES

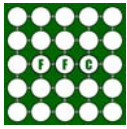
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#### VIEWING HABITS

- Premiership fans were less inclined than other fans to watch matches on TV if their team wasn't involved
- Almost 60% of respondents subscribe to satellite or cable TV in order to watch football
- Respondents subscribing to Satellite TV in order to watch football at home also tend to attend more matches

#### THE INCREASING NUMBER OF GAMES ON TV AFFECTS FANS MATCH ATTENDANCE

- Fans are influenced to watch games on TV rather than go to the match - especially away fans and supporters of lower division clubs
- Although, on the whole, attendances across the divisions have been increasing over the last decade there is concern that as more games than ever are being televised, attendance figures in the future - particularly the number of fans who may be influenced to watch games on TV rather than go to the match (especially away fans and supporters of lower division clubs) – could fall.
- When it came to choosing to watch a televised game rather than attending even though respondents could have got to the stadium:
  - 12% of respondents did this at least once for HOME televised matches
  - 1% did it more than five times
  - 25% of respondents did this at least once for AWAY televised matches
  - 3% did it more than five times
  - This was a particularly strong trend for respondents supporting higher division clubs as by nature they are featured more on television



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- A common complaint of the smaller clubs is that their gates suffer when big matches are televised at the same time. This was backed up by respondents who choose to watch another team's match on TV rather than attending their own – a trend affecting clubs below Division One more:
  - 3% of Premiership and Division One fans did this at least once (both home and away)
  - 6% of Division Two fans and below did this on at least one occasion when their team was playing at home
  - 9% did this on at least one occasion when their team was playing away
- This indicates a worrying trend when it comes to the lower division clubs who do not attract large TV revenues and for whom gate receipts are an even more crucial part of their revenue.
- The important thing for match-attending fans is that the authorities and broadcasters strike a balance between the dangers of the amount of football on TV – an easy alternative to fans actually attending matches, particularly away fixtures - with the opportunity it provides to watch matches when tickets are unavailable
- The solution for the authorities is that high profile matches shouldn't be scheduled for the same time as lower division matches but with the number of fixtures in the football calendar this will always be problematic.

### **ALTERATIONS TO KICK-OFF TIMES ARE A NEGATIVE IMPACT OF TV ON FOOTBALL**

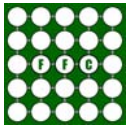
- Most fans comments centered on the negative impact of TV on football - the problems caused to fans (particularly those living further away from the ground) by alteration of kick-off times to suit broadcasters particularly:
  - Fixture changes are often done at short notice
  - Changing travel arrangements can be costly
  - Traveling a large distance for an early kick-off away
  - Traveling along way home after an evening fixture when there is little public transport
- 22% of respondents missed attending at least one of their team's HOME televised matches due to alterations in kick-off times; the figure was 24% for AWAY televised matches
- Those supporting clubs in higher divisions were far more likely to be forced to miss at least one of their team's home and away matches due to alterations in kick-off times
- Over three-quarters of respondents don't like lunch-time kick-offs as much as 3pm kick-offs and two-thirds felt the atmosphere of a lunch-time kick-off wasn't as good

### **TV PROVIDES AN OPPORTUNITY TO WATCH MATCHES WHEN FANS CAN'T GET TICKETS**

- On the more positive side television coverage does provide the opportunity for fans to watch a game which they want to attend but are unable to get tickets:
  - 16% watched at least one of their team's HOME matches on TV as they couldn't get a ticket
  - 4% of respondents did this on more than 5 occasions
  - 23% watched at least one of their team's AWAY matches on TV as they couldn't get a ticket
  - 7% of respondents did this on more than 5 occasions

### **THERE IS TOO MUCH FOOTBALL ON TV**

- The consensus was that there should not be an increase in the amount of football in television when the next TV contracts are negotiated - a significant minority felt there is too much football on TV and the number of games should be reduced:
  - 43% of respondents felt the number of televised games in the next TV contracts should be reduced
  - 18% felt there should be more games
  - 34% felt it should be left at the current level
- The sentiment that there is too much football on TV was strongest among three particular demographic groups - supporters over 24, Premiership fans and non-satellite/ cable TV subscribers



## Executive Summary: The Televising of Football

### 2.2 CONTENTS

<b>1. Introduction: The “Televising of Football” Survey and The Football Fans Census</b>	<b>3</b>
1.1 What is the “Televising of Football” Survey?	3
1.2 How is the Survey Sample Configured?	4
<b>2. Summary &amp; Conclusions</b>	<b>5</b>
2.1 Results Overview – The Key Issues	5
2.1.1 The effect of fixture time alterations on match-day experience and attendance	5
2.1.2 Does the increasing number of games on TV affect fans match attendance?	6
2.1.3 TV providing an opportunity to watch matches when fans can’t get tickets	7
2.1.4 The next TV contracts	8
2.1.5 Fans attitudes to lunch-time kick-offs	9
2.2 Voting Trends	10
2.2.1 Analysis: Results by Age	10
2.2.2 Analysis: Results by Distance Lived from Ground of Club Supported	11
2.2.3 Analysis: Results by Division of Football Club Supported	12
2.2.4 Analysis: Results by Match Attendance	15
2.2.5 Analysis: Results by Subscription to Satellite/ Cable TV	16
2.3 Qualitative Data – Fans Comments	17
<b>3. What is the Football Fans Census</b>	<b>18</b>
<b>4. Website Poll on Broadcasters and New Premiership TV Rights</b>	<b>19</b>
<b>5. Respondents who make up the Sample</b>	<b>20</b>
5.1 Age	20
5.2 Gender	20
5.3.1 Geographical - Region	21
5.3.2 Geographical – Distance Lived from Ground of Club Supported	22
5.4 Division of Football Team Supported	23
5.5.1 Football Consumption – Respondent Match Attendance	24
5.5.2 Football Consumption – Respondents Subscribing to Satellite TV	25
5.5.3 Football Consumption – Premiership Matches Watched per Season on TV	25
5.5.4 Football Consumption – Nationwide League Matches Watched per Season on TV	26
5.5.5 Football Consumption – FA Cup Matches Watched per Season on TV	26
5.5.6 Football Consumption – Champions League Matches Watched per Season on TV	27
5.5.7 Football Consumption – UEFA Cup Matches Watched per Season on TV	27
<b>6. The Survey Results</b>	<b>28</b>
<b>7. Fans Comments on the Televising of Football</b>	<b>33</b>
7.1 Problems with Fixture Alterations to Suit Broadcasters	33
7.2 General Issues	34
7.3 Responses to Poll	36
<b>Appendix 1      Analysis Figures</b>	<b>37</b>
A1.1 Analysis Figures: Results by Age	37
A1.2 Analysis Figures: Results by Distance Lived from Ground of Club Supported	46
A1.3 Analysis Figures: Results by Division of Football Club Supported	55
A1.4 Analysis Figures: Results by Match Attendance	64
A1.5 Analysis Figures: Results by Subscription to Satellite/ Cable TV	73
<b>Appendix 2      Survey Sample by Club Supported</b>	<b>82</b>
<b>Appendix 3      “Televising of Football” Survey Content</b>	<b>83</b>
<b>Appendix 4      Survey Report Recipients</b>	<b>89</b>