

New Findings in FA Premier League 2001 National Fan Survey

1. The Survey

The FA Premier League has just released new findings from the 2001 FA Premier League National Fan Survey, conducted by the Sir Norman Chester Centre for Football Research.

As in previous years, the main focus of the survey is FA Premier League season ticket holders, though a picture of a sample of non-season ticket holders has also been obtained. In 2001 a total of 56,020 questionnaires were mailed to randomly selected adult season ticket holders at all FA Premier League clubs, producing replies from 22,090, a response rate of 39.4%. A total of 23,980 questionnaires were distributed to non-season ticket holders using club databases and modes of ticket application as a guide, producing returns from 7,633 fans, a response rate of 31.8%.

Overall some 80,000 questionnaires were made available for distribution to supporters at the 20 FA Premier League clubs. This produced 29,723 replies in time for analysis, from respondents, a response rate of 37.2%. 74% of the sample were season ticket holders and 26% were non-season ticket holders.

The 2001 fan survey has a strong emphasis on fans' views and experiences of the services and facilities now offered to football fans in England.

But it also looks at:

- The experiences of fans on all-seated stadia
- Their views on the events which go on around the staging of matches
- The reasons why fans have returned to football or have started attending recently
- The active involvement of fans in local football
- Fans' views on foreign players in football
- Ideas from fans about the sorts of qualities that are exhibited by the club they support

These areas are in addition to the collection of material on the social background of fans, their TV football viewing habits, on their patterns of spending around football, and their experience of spectator problems.

2. Summary of the Findings

i. Basic demographics

- Leicester City has the highest proportion of female season ticket holders (26%).
- Female season ticket holders at FA Premier League matches have increased from 12% to 14% in the sample over a four-year period from 1997 to 2001.
- In 2001 54% of our season ticket fans were aged over 40 years old.
- There is very slow change in club minority ethnic support, though foreign national fans are on the increase

- Almost 80% of the fans in the survey are in employment, with 10% retired.
- Season ticket holders at the top clubs are strongly represented amongst the ranks of managers and intermediate occupations
- FA Premier League fans are higher earners than Football League fans, but the North/South split in the FA Premier League is also very evident. For example, only 25% of Sunderland fans earn more than £30,000 a year, while at Chelsea only 38% of season ticket fans earned *below* this threshold.
- 67% of FA Premier League fans were locally born to their clubs (within 20 miles of the home ground).

ii. Patterns of Support

We have tried to track *new* club supporters in 2001.

- Charlton Athletic (17%) and Ipswich Town (14%) lead this group, with Sunderland and Liverpool having the fewest *new* fans.
- 19% of Derby County fans described themselves as *returned* fans, perhaps returning to support the club as a result of the new Pride Park stadium.
- At least half of all new or returned fans gave '*changes in my own situation*' as a reason for watching football now, but fans also point to '*improved facilities*' and '*declining hooliganism*' as incentives for watching football today.
- 40% of fans also attend another live sport at some stage through the year
- 33% of all supporters watched their club's reserve games at least once or twice a year.
- 48% of all men in their 20s in the sample also play in a football team

iii. Supporter Connections and Commitment

Loyalty schemes, shareholders, club memberships, are all looked at in the survey.

- Aston Villa has the largest proportion of season ticket holders who are also shareholders (39%).
- 61% of the whole sample attended all of their club's home games, while women are slightly more likely than men not to attend any away matches.
- The club is 'very important' especially for fans of the two Merseyside clubs.
- Liverpool and Leeds United supporters are the most optimistic about the future of their clubs in 2001. Aston Villa fans had lost some confidence in their own club

iv. Travel and Transport

Consideration is given here to the distance fans live from their club's home ground, and how long it takes for people to get to home games. We also look at what people do before going to home matches. The section also takes a look at how long before kick-off fans like to be in the stadium, at ways Clubs might try to get fans into the stadium earlier.

- Bradford City has the most 'local' fan base, with 84% of Bantams' fans living within 10 miles of the home ground.
- Only 18% of all fans in the sample like to be in the ground more than 30 minutes before the kick-off.
- Better pre-match entertainment would possibly increase this figure.
- 64% of fans travel by car to home games.
- More than half of all *local* fans go straight to the ground, whereas nearly half the *national* fans (those living more than 50 miles) go first to the club shop before a game.

v. With Whom Do You Usually Attend Home Matches?

Matchday companions are the focus of this section. Respondents were also asked to give information on taking young children to matches.

- The proportion of fans attending football with adult friends is 56%
- The proportion of adults attending with their partners or spouse has increased from 17% in 1997 to 20% in 2001.
- Cost is among the main things preventing fans from bringing children to football; at least this was the reason given by 26% of lower earning fans

vi. The Matchday Experience

Fans' views on what is generally on offer by their club, apart from the game in hand are analysed here. As are issues around all-seated stadia, fan behaviour, and 'letting off steam' at matches.

- 85% of FA Premier League fans believe that all-seated stadia have increased fan safety.
- However, only 13% feel that match atmosphere has got better as a result of the move to seats.
- About seven-out-of-ten fans like the *music played as the teams come out*.
- 74% of Derby County fans positively like the club's mascot, the highest positive response in the League.
- Nearly three-quarters of supporters feel their club manages fans inside the stadium *about right* and most supporters still feel they can 'let off steam' at matches
- Concerns about stadium atmosphere seem strongest at two clubs, Manchester United and Newcastle United

vii. Club Services and Facilities

Fans' views on a range of services and facilities are analysed here, including: general safety in the stadium; club website; quality of food and drink; club 'community' activities etc. The responses were ranked on a scale of one-five. The section completes with an investigation into fans' views on the value for money of home match attendance.

- FA Premier League club fans scored clubs positively on their *activities on the community side, the general safety of the ground, the match-day programme* and Clubs' *work against racism*.
- The clubs scored more poorly on *the extent (the clubs) listen to fans' views* and the *quality of the food and drink*
- Club staff were most praised at Ipswich Town and Charlton Athletic
- Charlton Athletic and Sunderland are the top rated 'community' clubs
- The Chelsea official Club *website* is highly rated by Chelsea fans
- Clubs 'listen' to fans at Ipswich Town and Charlton Athletic, less so, according to fans, at Aston Villa and Newcastle United
- 99% of Charlton Athletic fans believe that they get at least 'reasonable' value for money at club home matches. 98% of Ipswich Town fans feel the same way. At Newcastle United this figure is much lower, at 56%
- 52% of Sunderland fans think their Club offers better value for money than other sports. Only 7% of West Ham United fans feel the same way

viii. Spending on Football

The focus of this section is the cost of attending FA Premier League matches and fan spending.

- In this sample, Arsenal has the most expensive season ticket average price (£747). West Ham has the highest average match ticket cost (£35).
- Chelsea supporters spend, on average, the largest amount on club merchandise (average of £192).
- The match programme/magazine is, overall, the most popular fan purchase in the FA Premier League, especially at Chelsea and Charlton Athletic.
- The highest total spending season ticket holders over the season, is at Arsenal with a spend of £1627. The average season ticket holder spend for all fans is £1039.
- Almost six-out-of-ten season ticket holders would typically buy a new club replica shirt. At Sunderland this figure is a national high of 77%.

ix. Football on Television and The Internet

Here we look at subscription to live football coverage on TV, the number of live matches watched in a week, and where fans watch live matches on TV. The section completes with a look at fans and the internet. How often it is used for football information, and what sort of information fans look for, are both analysed

- Only 12% of fans do not watch live matches on TV, 59% watch one or two, and 29% watch more than two.
- Many fans suggest they will use the internet more in the future for keeping up with club news (66% of season ticket holders), and for ticket information/purchase (73% of non-season ticket holders).
- Along with Leeds United, fans of the London clubs are most likely to use the internet for information on their club *at least a number of times a week*.
- To keep up with club news and match ticket issues are the two most popular reasons for visiting Club sites

x. Fan Behaviour and Player Behaviour

The number of times fans saw or heard sexuality abuse, racism, offensive language, fighting/missile throwing at their own club's matches in 2000/2001 is looked at here.

- 39% of fans say they hadn't seen or heard any of these in the 2000/2001 season.
- 36% had heard offensive language, 27% have heard racism towards players, and 24% of fans have seen fighting/missile throwing.
- Only 7% of the sample believes hooliganism is actually increasing. However, at a small number of clubs this figure was much higher. At Manchester City, for example it was 32% in 2001.

xi. Fans' Perceptions of Clubs

This section analyses how fans of 10 FA Premier League clubs view the qualities of their clubs. We offered a number of descriptors and asked supporters to choose between them.

- Six-out-of-ten of all respondents here thought their clubs are both ambitious and friendly.
- Only 10% of the sample say that their club is unreliable.

xii. Football Quality and Foreign Players

Fans' views on the quality of football they watch, the kind of players they feel their own club should recruit, and the number of foreign players in England at the moment are analysed here .

- 48% of the sample believe their club should sign the best players irrespective of origin, although a significant number of fans do believe their club should have some local players (31%).
- 60% of the total sample now believe there are too many foreign players in England; only 1% believe there are too few.

xiii. Summary

This report consolidates the trends and suggestions, which have, began to emerge from previous years' reports. We know that women make up one in seven on FA Premier League supporters, and that this figure is probably growing, although at different rates between provincial and larger urban northern clubs. We suspect that ethnic minority support is also growing, but only slowly and from a very low base. 55% of the 'typical' FA Premier League crowd is aged between 30 and 50 years old, and half of all match attendees attend games in groups of adult friends.

The Premiership also seems to be attracting new fans who are higher earners, and are drawn from the higher social classes. One-third of FA Premier League supporters in our sample earns in excess of £30 000. Lower earners seem more strongly committed to their clubs than higher earners. 25% of fans in our sample live within five miles of the stadium.

More than one in two of our supporters have bought the new club replica shirt, and most watch televised football. Finally, 25% of the sample will witness hooliganism at football during the season, but most people don't see it as a rising problem. The main 'behaviour' problem that seems to be growing in the eyes of supporters is player indiscipline.

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