



The F.A. Premier League National Fan Survey Report



2005/06 Season



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National Fan Survey Foreword

During the course of the Premier League's history we have recognised that as the modern game develops it is essential to our continued success to grow and improve our relationship with fans.

The FA Premier League National Fan Survey serves as a useful barometer for gauging which issues supporters care about as well as identifying emerging areas that may not have been relevant five or ten years ago.

It is clear that there are many traditions fans hold dear; such as going to football with friends, the pre-match pint and buying scarves and kit. New traditions are springing up such as the preference for live televised games at 4:00pm on Sundays. However, attending fans still favour Saturday 3:00pm kick-offs and continue to overwhelmingly back our policy of not broadcasting these matches.

However, fans are adding to their priorities; for example accessibility to Club information via internet or mobile, knowing the extent of their Club's community offering or the way they are treated by Club staff.

Obviously this comes about as technology advances and expectations in regard to facilities and services rise. We are also witnessing a slight change in demographics in the new fans the Clubs are attracting, with more women and children attending matches, which can influence attitudes.

It is the challenge for the Premier League and its Clubs to ensure that we not only pay attention to 'traditional' areas, but that we also recognise and address the new issues appearing on all our fans' horizons.

The signs are that we are keeping our eye on the ball, particularly in regard to fundamental areas such as matchday experience and excitement of the League. Nevertheless it is clearly important that exercises such as this, as well as other forms of research, continue to evolve in order to maintain the Premier League and its Clubs' ability to build on strengths and react to concerns.

Richard Scudamore

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Executive Summary

The 11th F.A. Premier League National Fan Survey once again demonstrates the overall willingness of supporters of Premier League clubs to participate in consultation exercises of this type.

Within the following pages, there is much that the Premier League and its clubs will like to hear. The tone throughout is upbeat and positive; there is a lot to take heart from – particularly in relation to the way that football clubs are increasingly seen as a cornerstone to their local communities. Football clubs and their activities continue to shape people's lives.

Introduction and Methodology

The methodology for the 2005/06 F.A. Premier League National Fan Survey remains unchanged from previous surveys, namely questionnaires mailed to attending supporters selected at random from club databases.

The response remains equally as high as in previous surveys with 24,650 completed questionnaires being returned for analysis – a 31% return rate which underpins the importance of this survey.

Fieldwork was conducted during October and November 2005.

Supporter Variants

The 2005/06 survey highlights that the average supporter has been attending matches for 23 years – a finding that clearly points to longevity of support and an educated customer base.

The overall demographic profile of supporters shows consistency with previous years so we conclude that the survey reaches by and large the same target fans that it always has done.

Beyond this we can also identify that those new to top flight football are younger and more likely to be female than the average Premier League supporter – a reflection perhaps of clubs' efforts in attracting 'fresh faces'.

What makes people support their team, and what drives them to go to matches on such a regular basis and over such a long period? The clearest response in the survey is that it is their local Premier League team and their parents went before them. In addition, simply seeing their team play live and the quality of football on offer are also key drivers for Premier League supporters.

Importantly, the majority of fans in this survey attend the majority of home matches of the Premier League club they support. Where this is not the case, three factors impact – family commitments, ticket cost and work commitments.

Who do they go with? More people are taking their own children, but it seems that in the main match goes attend matches with the same friends they have always attended with.

The Premier League

Here there is much encouragement to be had. The Premier League is seen in a positive light by the great majority of supporters.

The vast majority – nine out of ten – see Premier League players as key role models within modern society. They, like their clubs, are seen to have an important function to play in sustaining and developing the ties between Premier League clubs and their surrounding communities. This provides solid endorsement of work undertaken by the league and clubs.

Another endorsement is seen by way of growing awareness of the way that football clubs can work for the greater social good – the success of the Kick It Out! anti-racism campaign is a shining example of this, as is the increased awareness this year of the Football Foundation and The Prince's Trust Football Initiative.

Adding further depth and diversity to that sense of community linkage would appear to be a very positive way forward for Premier League clubs. Working towards greater social inclusion can only be of benefit to the overall perception of what the Premier League and its clubs are about.

Looking more broadly, the 2005/06 survey highlights the perception of the Premier League as an exciting brand – two-thirds of those surveyed view the Premier League as the most exciting league in Europe.

Fan Attitudes

This area is more focused towards club performance and understanding what issues fans perceive as priorities.

When asked what is most important, supporters respond with the matchday experience – the fundamental priority of any Premier League club. To be more specific we are primarily talking about good sight lines of the game and a great match atmosphere.

As a monitor of fan priorities, this survey continues to report good performance in both these areas. Other areas that fans consider important also see positive progress, such as the improved performance in customer service at clubs through the attitude of club staff to fans and ease of contact by telephone.

Mainstays of key importance such as fan safety and the behaviour of other fans continue to attract positive feedback from Premier League supporters.

Fan Spending

Once again the F.A. Premier League National Fan Survey provides a detailed insight into the matchday spending habits of fans and reveals that average matchday spending is up 26% year-on-year – up from £8.70 to £11 – while spending on club merchandise items overall is up 7%, from £109 to £117.

Survey data concludes that non-season ticket holders spend on average more than their season ticket holder counterparts; and those fans that attend with children (be it their own children or other people's children) spend more than the average fan.

In terms of matchday expenditure, the most popular items of purchase remain food or meals (not including confectionery or snacks), soft drinks and alcohol. All areas of matchday consumables see greater proportions of fans buying this year compared to last year.

Expenditure on club replica shirts remains solid; it is a mainstay of club merchandise and is in as much demand as ever. Again all areas of club merchandise are being bought by a higher proportion of fans this year compared to last.

TV and Football

This survey reveals that most fans have access to satellite TV at home, with the popularity of Freeview increasing year-on-year. 91% of Premier League supporters surveyed this year watch live Premier League matches on TV.

A new question area reveals the most preferred slot for live Premier League matches is four o'clock on a Sunday.

Opinions on whether there are too many Premier League games on our screens remains finely balanced – slightly more feel there is too much football on the box, but on closer inspection this is primarily season ticket holders who will already be attending live matches, and perhaps as a result, less inclined to watch on TV.

The Internet and Football

The penetration of the Internet among football supporters continues to outstrip that of the UK population in general, with the frequency of Internet access also firmly on the rise. The two factors combined make for a compelling future for the Internet within football.

Most supporters still access the Internet from their home or workplace. The big growth area, however, is among those accessing the Internet via their mobile phones. People increasingly want to have news and views from the Premier League right there in the palm of their hand.

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CHAPTER

1

Introduction

This is the 11th National Fan Survey commissioned by the Premier League.

As ever, the aims of the survey are very straightforward – to give fans an opportunity to give the clubs some feedback, and to give Premier League clubs a far greater understanding of just who their customers are. Who is the typical fan? What makes them tick? Where do their priorities lie? In short, how was it for them?

Areas of new debate and expansion include the role Premier League clubs might be able to play in wider community initiatives – as a provider, for example, of adult health education programmes.

For the fourth consecutive year, the 2005/06 F.A. Premier League National Fan Survey was conducted by *SportsWise*, an independent sports research consultancy.

Report Structure

The 2005/06 report takes a detailed look at how supporters perceive the Premier League and the way that clubs interact with their surrounding communities, before conducting a more in-depth look at the profiles and behaviours of supporters themselves.

Thereafter the report examines fans' attitudes and opinions towards a number of key, interaction points – areas where supporters and the Premier League meet and asks whether or not the customer comes away satisfied.

The 2005/06 survey also targets issues surrounding fans' spending habits – from how they like to spend their money on matchdays in the ground, to what they buy in the club shops.

Finally, the survey tackles an area of keen interest to Premier League clubs – the role that the TV and the Internet play in shaping the relationship between clubs and their supporters.

Methodology

The 2005/06 F.A. Premier League National Fan Survey was once again based upon a postal self-completion method. By embracing such a survey, supporters are not outsiders looking in; they are playing an active role in shaping football's future direction.

Paper questionnaires were posted out and distributed between a broad cross-section of a club's supporter base – importantly, their names were gathered and selected randomly from clubs' individual databases. All target respondents were match attenders at each club in question.

The focus remained on season ticket holders and non-season ticket holders (members/casual attenders etc) – giving, as a result, the opinions of those supporters long wedded to their club, as well as those fans with a more casual attachment.

On that basis, the mail-outs were designed to reflect that balance – i.e. two-thirds season ticket holders to a third non-season ticket holders.

Results have been treated to reflect the relative weight of each club's fan base – i.e. the size of the club's average attendance, as opposed to individual response rates. This then ensures that we can claim proper representation of those who attend Premier League matches.

The 80,000 questionnaires – 4,000 per club – were despatched to randomly selected supporters in October 2005, with a total of 24,650 being returned completed – a very healthy 31% response rate.

West Ham United supporters topped the league in terms of returns with a 42% response rate – compelling evidence in itself of a strong interest in this sort of consultation exercise.

Sampling

**TABLE
1.1**

Questionnaire distribution and response rates 2005/06

CLUB	STHs OUT	STHs IN	STH Response Rate	Non-STHs OUT	Non-STHs IN	Non-STH Response Rate	Total OUT	Total IN	Total Response Rate
Arsenal	2,800	1,018	36%	1,200	290	24%	4,000	1,308	33%
Aston Villa	2,800	785	28%	1,200	240	20%	4,000	1,025	26%
Birmingham City	2,800	883	32%	1,200	277	23%	4,000	1,160	29%
Blackburn Rovers	2,800	1,074	38%	1,200	324	27%	4,000	1,398	35%
Bolton Wanderers	2,800	976	35%	1,200	151	13%	4,000	1,127	28%
Charlton Athletic	2,800	812	29%	1,200	300	25%	4,000	1,112	28%
Chelsea	2,800	830	30%	1,200	370	31%	4,000	1,200	30%
Everton	2,800	816	29%	1,200	369	31%	4,000	1,185	30%
Fulham	2,800	807	29%	1,200	313	26%	4,000	1,120	28%
Liverpool	2,800	1,000	36%	1,200	305	25%	4,000	1,305	33%
Manchester City	2,800	970	35%	1,200	297	25%	4,000	1,267	32%
Manchester United	2,800	727	26%	1,200	367	31%	4,000	1,094	27%
Middlesbrough	2,800	1,076	38%	1,200	139	12%	4,000	1,215	30%
Newcastle United	2,800	886	32%	1,200	115	10%	4,000	1,001	25%
Portsmouth	2,800	992	35%	1,200	200	17%	4,000	1,192	30%
Sunderland	2,800	1,153	41%	1,200	209	17%	4,000	1,362	34%
Tottenham Hotspur	2,800	1,005	36%	1,200	368	31%	4,000	1,373	34%
West Bromwich Albion	2,800	1,041	37%	1,200	221	18%	4,000	1,262	32%
West Ham United	2,800	1,198	43%	1,200	492	41%	4,000	1,690	42%
Wigan Athletic	2,800	1,074	38%	1,200	180	15%	4,000	1,254	31%
TOTALS:	56,000	19,123	34%	24,000	5,527	23%	80,000	24,650	31%

NB: Portsmouth handed out 375 questionnaires to Non-STHs on matchdays

Notes to reader:

All sample surveys are open to some degree of bias. Self-completion surveys are open to self-selection, which means that respondents that are not disposed to take part may be underestimated. This may result in undervaluing certain sections of the fan base.

However, the level of response to this survey far surpasses the likely response of other self-completion surveys and this helps to minimise any bias associated with the method itself.

Data in this report has been weighted to reflect average match attendance for each club for the seasons where findings are reported on. This approach provides for an overall Premier League picture to be developed.

Findings are reported as percentages, or average ratings (either on a 3 point, 5 point, or 10 point scale). Where percentages do not add to 100%, this is due to the exclusion of 'don't know' responses, rounding of figures, or 'other' responses that have not been presented.

Sample sizes for levels of response (e.g. n=25,539) appear on every graph and vary due to different levels of response for each question. Some graphs indicate average samples.

Significant differences are common in a survey of this magnitude due to the large samples. For this reason they are not highlighted in this document.

CHAPTER

2

The Role of the Premier League

The Role of Premier League Clubs

The way that the Premier League is perceived by its supporter base is a key concern for all involved in football's top flight.

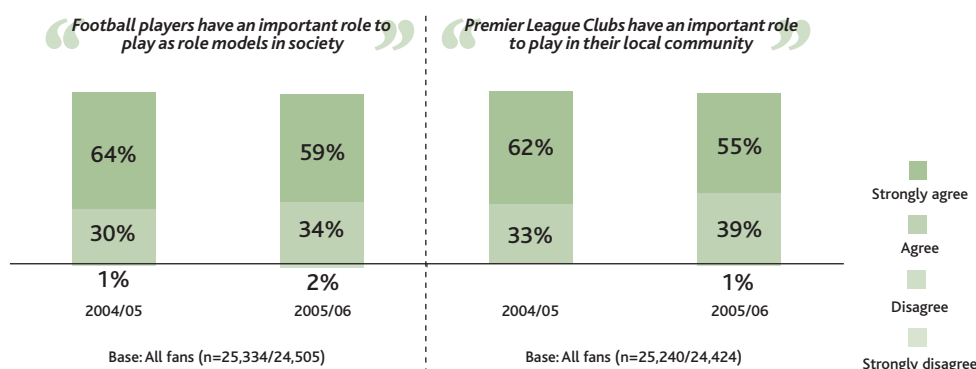
Previous surveys have already delved into the way that Premier League member clubs interact with their surrounding communities and the 2005/06 National Fan Survey carries on that tradition – this year, we look towards the future and ask how might that important local bond be both strengthened and enhanced.

It is evident that the Premier League has a firm foundation to work from with more than nine out of ten supporters believing that their club has an important role to play within their local communities.

FIGURE

2.1

The Role of players and Premier League Clubs



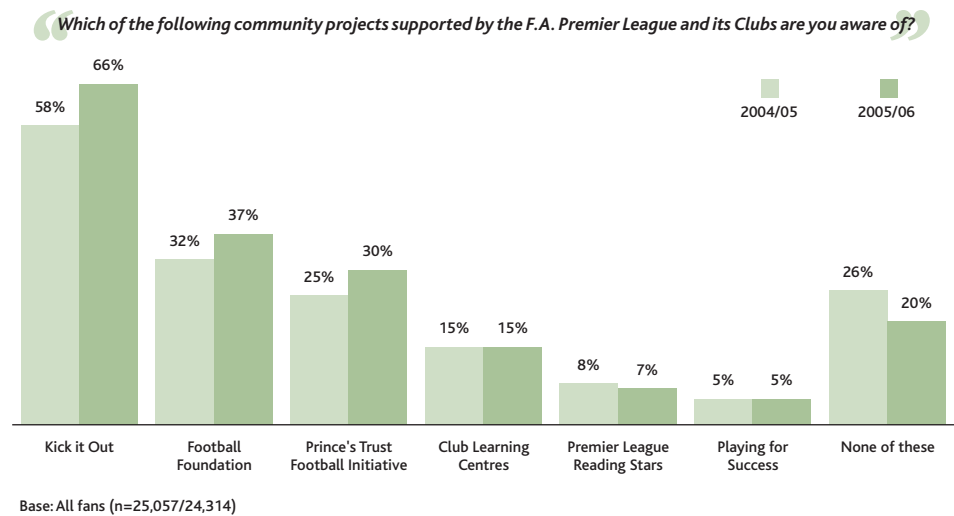
Likewise that same, over-whelming majority believe that Premier League players, too, have an important role to play in the general well-being of their community.

Community Initiatives

As for supporters' awareness of the various community-related initiatives that have been either launched or supported by the Premier League, there is real evidence of a growing appreciation of their commitment to act as a force for social good.

Three key initiatives – Kick it Out, The Football Foundation and The Prince's Trust Football Initiative – all see significant increases in the terms of the proportion of fans that are aware of their existence. This is a very positive reflection of campaigns undertaken to date by the Premier League and others.

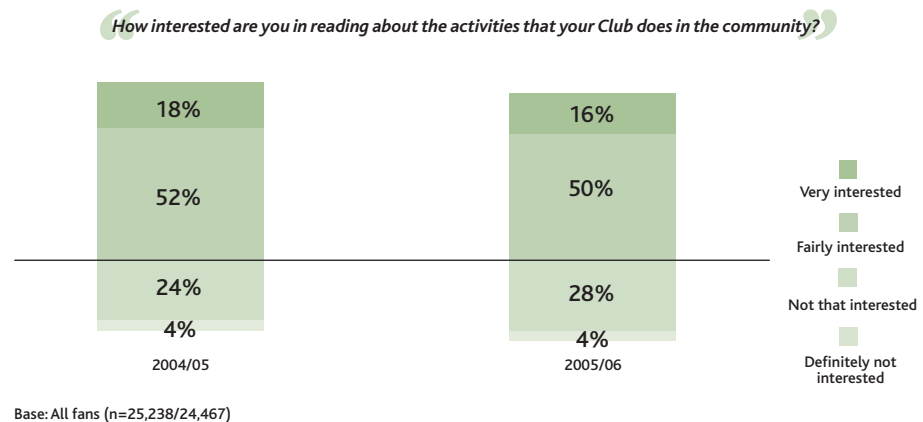
FIGURE 2.2 Awareness of community projects



The scope for communicating the extent and nature of Premier League community initiatives remains, even if 80% of fans are aware of them.

What makes the case for community interaction even stronger is the fact that supporters are keen to read more about the way that they and their club can come together – hence the two-thirds of those surveyed who would be interested in reading more about their club's activities in the community.

FIGURE 2.3 Reading about community activities



As for the future and where supporter and club could meet over and above when matches are played, the 2005/06 survey reveals broad areas of possible interest with 1 in 5 of those questioned open to the possibility of using their football club for health checks or screening, while adult education courses (12%) and after-school clubs and classes (10%) offer other areas worthy of note.

TABLE
2.1

Other possible Club activities

“How likely would you or your family be to engage in any of the following activities if they were based or available through your club?”

% Very/Fairly likely	2004/05	2005/06
Bases	24,634	23,953
Football coaching	31%	33%
Health check/screening	26%	19%
Health information / advice	N/A	15%
Travel vaccination	N/A	12%
A GP service	N/A	12%
Adult education courses	13%	12%
After school education classes	10%	10%
Family reading groups	6%	6%

As ever, however, football coaching courses (33%) remain the most obvious way for Premier League clubs to engage with their community and fan base.

Premier League Perceptions

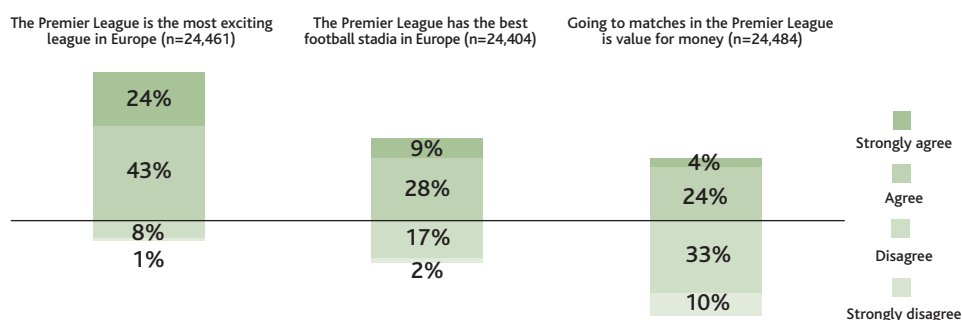
Another strand to the 2005/06 F.A. Premier League National Fan Survey was the chance to place the Barclays Premiership in an international context – to draw comparisons with its counterparts across Europe.

Once again, there is generally positive reaction with two thirds of those surveyed viewing the league as the most exciting in Europe, with a further one in three believing that the Premier League has the best stadiums in Europe – responses that, inevitably, varied between individual clubs depending on the age of their own home ground.

FIGURE
2.4

Perceptions towards the Premier League

“Below are statements that people have made about the Premier League. Please indicate how much you agree with each statement”



CHAPTER

3

Fan Profile

The 'Fan Profile' section of the 2005/06 F.A. Premier League National Fan Survey sets out to answer one very simple question: Who is coming to Premier League games?

For as the survey slowly but surely reveals the profile of the average Premier League supporter – be it in terms of their gender, age, social class, income or ethnicity – so a consistent pattern duly emerges; one that is wholly in line with last year's findings.

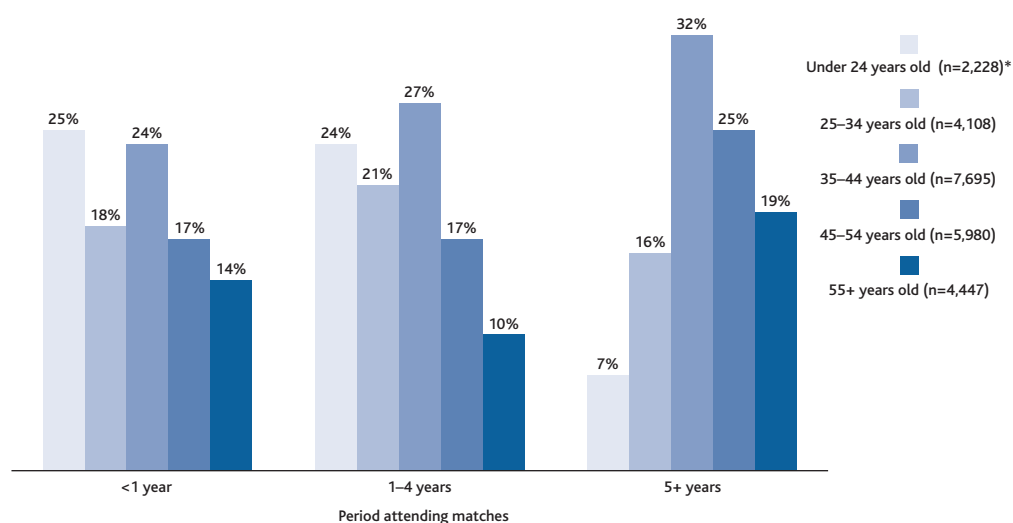
Age

Whilst the survey consistently shows that the age profile changes little – the average supporter age this year being 43 as opposed to 44 last year – when we look at the findings in terms of 'fresh faces', we see a marked variation.

What is revealing here perhaps is that whilst supporters aged under 24 account for less than 1 in 10 fans overall (9%), they account for 1 in 4 of 'new fans' – those that have attended for up to a year. Encouragingly, a similar pattern emerges for those that have been attending matches for between 1 and 4 years. So, the new fan to Premier League football is very different in age profile to the more established one.

FIGURE
3.1

Fan age by period attending matches

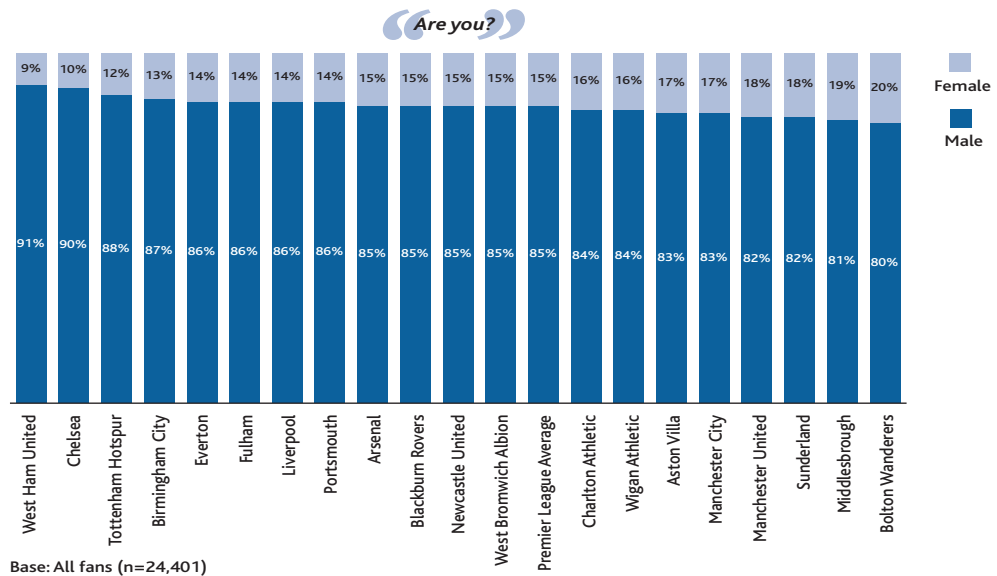


* The focus of this survey is on adult supporters. However, a small proportion of under 16 year olds (2%) are present in the data and these are included in the chart above.

Gender

Whilst the overall figure for female support shows consolidation at 15%, this hides some increases in female support for some clubs when compared with findings from the survey 4 years ago, namely: **Liverpool** 14% from 9%, **West Bromwich Albion** 15% from 10%, **Aston Villa** 17% from 11%.

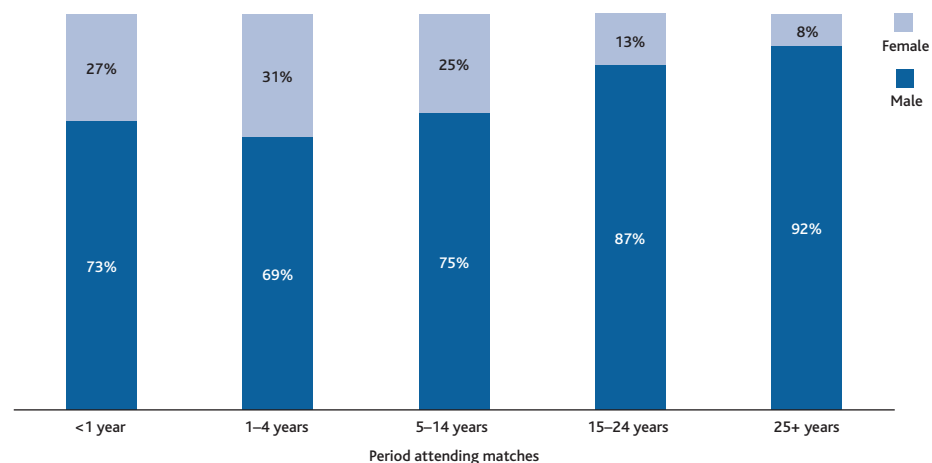
FIGURE 3.2 Fan gender



Bolton Wanderers and **Middlesbrough** are two clubs that consistently have a strong female supporter base.

As we see with age, there are higher levels of female attendance amongst more recent supporters – this is most marked amongst those new to Premier League football within the last 4 years (37% female).

FIGURE 3.3 Fan gender by period attending matches



Social Class

The average Premier League fan has been attending matches for, on average, 23 years. In this sense, it is perhaps not surprising to see little discernible difference in the socio-economic profile of supporters between surveys.

It is perhaps also true that the emphasis on AB supporters is, in part, a reflection of greater prosperity for the country over the recent few decades – a contributory factor that would impact on football support.

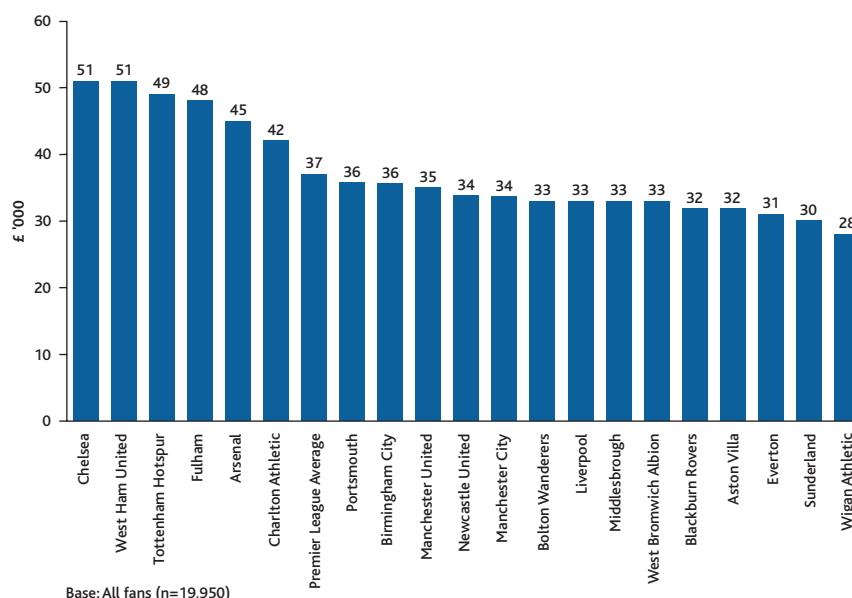
The biggest change – itself only 2% (46% to 48%) – comes at the top end of the scale with 48% of fans being classified in the AB bracket.

TABLE 3.1 Socio-economic grouping

	AB Upper middle	C1 Lower middle	C2 Skilled working	DE Working class/subsistence
Premier League 2005/06	48%	24%	18%	10%
Premier League 2004/05	46%	25%	19%	10%
Premier League 2003/04	45%	27%	18%	10%
Premier League 2002/03	46%	23%	20%	11%

The social spread across member clubs largely reflects the socio-economic make up of the regions, with the London clubs – **Chelsea, West Ham United, Tottenham Hotspur, Fulham, Arsenal** and **Charlton Athletic** – enjoying the greatest average income per head, with areas of the North-West (**Wigan Athletic, Everton, Blackburn Rovers**), the North-East (**Sunderland**) and the West Midlands (**Aston Villa**) demonstrating the lowest.

FIGURE 3.4 Average fan income



Ethnicity

As for ethnicity, 96% of the 2005/06 respondents describe themselves as 'white'. Given that the current percentage of people in the wider population that are deemed 'white British' is 92%, it could be argued that the ethnic composition of Premier League supporters is not too far removed from that of society as a whole.

The two clubs with the greatest ethnic profile were **Fulham** with 92% 'white' supporters and **Tottenham Hotspur** with 93%.

Delving a little deeper, the nature of support is also revealing for Premier League clubs with proportionally fewer season ticket holders coming from the ranks of ethnic minority groups than is the case from white British backgrounds (59% versus 67%), and whilst head counts carried out by clubs themselves are suggesting growing attendances amongst ethnic minority fans, this survey suggests that the next challenge may be to encourage greater frequency and commitment in attendance.

CHAPTER

4

Fan Characteristics

In this section of the 2005/06 F.A. Premier League National Fan Survey, we take a far more detailed look at fans' behaviour patterns – be it the length of time they have been attending Premier League games to how far they travel to watch games.

By charting such patterns – in particular supporters' habits once they actually arrive within the ground – it gives member clubs a greater understanding of their customer base and how they actually plan their visit to a match.

Greater awareness of supporters' matchday travel habits can also help arm clubs with a better knowledge base when it comes to discussions with local authorities and residents' bodies in relation to the age-old problems of matchday parking and traffic congestion.

Match Attendance

Among the season-ticket customers, the level of match attendance during the course of a season remains consistent with previous surveys with the average season ticket holder attending 22 games, 18 home and 4 away.

The slight drop in the figures for non-season ticket holders from a steady 12 per season over the course of the last three surveys to nine this time round may be a result of higher demand for tickets. The 2006/07 survey will be interesting in revealing this as the start of a trend.

TABLE
4.1

Match attendance

Fan Type	2002/03	2003/04	2004/05	2005/06
Bases	26,821	25,018	23,445	24,579
STH	22 games	22 games	23 games	22 games
	18 home 4 away	18 home 4 away	19 home 4 away	18 home 4 away
NSTH	12 games	12 games	12 games	9 games
	9 home 3 away	10 home 2 away	9 home 3 away	7 home 2 away

STH = Season ticket holder, NSTH = Non-season ticket holder

Across the clubs themselves there are some wide variations with a mere 27% of those **Fulham** supporters responding in the survey attending every game at Craven Cottage, compared to 65% of **Newcastle United** and **Middlesbrough** fans.

Period attending matches

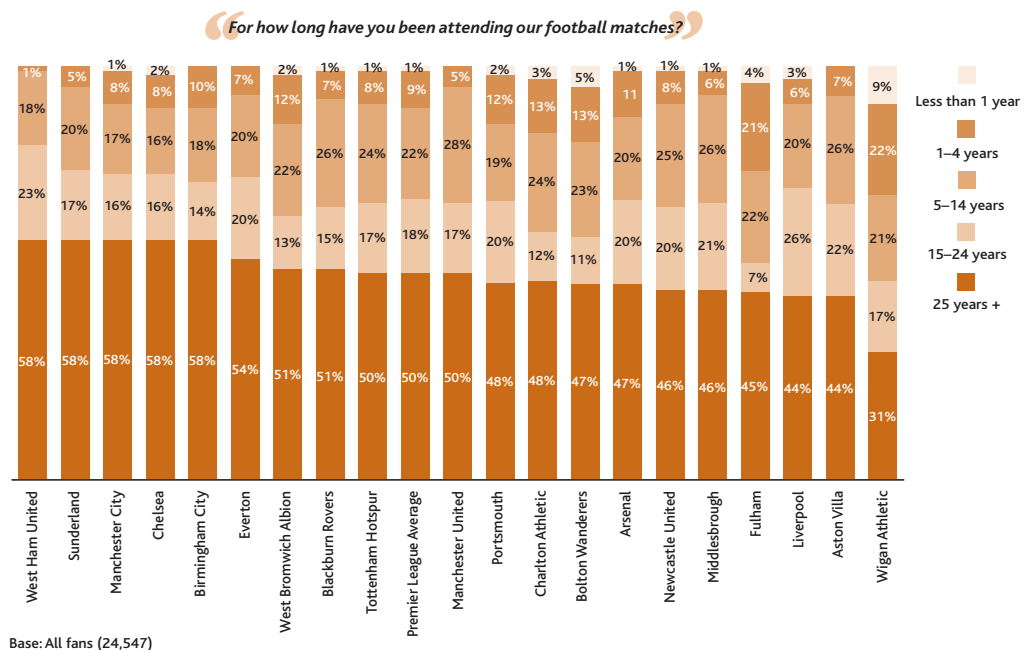
Wigan Athletic's name figures prominently again in clubs with the greatest number of 'fresh' faces – i.e. supporters who have only started attending matches within the last year. The Latics top the pile at 9%

followed by **Bolton Wanderers** (5%) and **Fulham** (4%). All three have, of course, enjoyed a significant change in status in recent years and, having established that precious foothold in the top flight have, as a result, duly attracted new customers.

Not surprisingly, season ticket holders have on average been attending their team's matches for longer than non-season ticket holders – 25 years in the case of season ticket holders, 21 in the case of the non-season ticket holders.

With regard to individual clubs, **West Ham United** lay claim to the prize for longevity with supporters having, on average attended games at Upton Park for 26 years. At the other end of the scale, Premiership new-boys **Wigan Athletic** have the shortest-lived supporter base at 17 years.

FIGURE 4.1
Period attending matches



What made you start going to matches?

Locality remains, as ever, the No1 determining factor as to why Premier League club supporters started attending matches. It was their local football club therefore that's where they went.

Equally prominent is the parental influence at work (43%). This is particularly true of **West Bromwich Albion** (59%) and **Everton** (56%). Parental influences are again of less importance at the newer end of the market – for example **Wigan Athletic** (24%), and for **Chelsea** (33%), **Fulham** (39%) and **Manchester United** (39%).

TABLE 4.2
Reasons for first attending

What made you start going to matches?

	Total	STH	NSTH
Bases	24,572	19,090	5,482
It is my local club	51%	56%	40%
Parental influence	43%	46%	38%
Family/friends wanted me to come	27%	28%	25%
The way the team plays	22%	18%	29%
I watched the team play on TV	10%	8%	15%
The club is successful	10%	8%	14%
Good stadium facilities	10%	8%	14%
To see a particular player	8%	7%	11%
More free time to go	7%	6%	9%
Other	12%	10%	16%

Middlesbrough (85%), **Wigan Athletic** (82%) and **Portsmouth** (79%) all displayed strong responses to the fact that they were supporters of local teams.

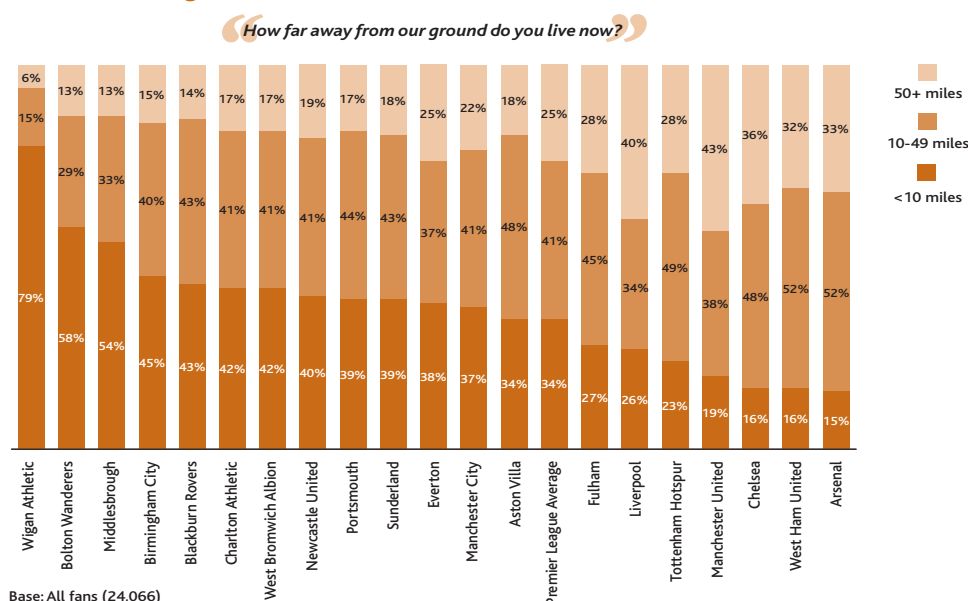
One significant distinction was evident in the male-female split with women far more likely (38% versus 25%) to start attending games due to the influence of friends and family.

Distance lived from the ground

The closest set of fans belong to **Wigan Athletic**, with 8 in 10 (79%) of their fans living within ten miles of the JJB Stadium.

FIGURE
4.2

Distance lived from ground



On average, supporters live 45 miles from their club's stadium. Interestingly there is still a significant difference between season ticket holders (28 miles) and non-season ticket holders (79 miles) which would appear to make sense – the further someone lives from a ground the less likely they are to commit themselves to the time and cost inherent to travelling such greater lengths on a regular basis.

The same is true of the split between young and old – 52 miles for the 16 to 24-year-olds as opposed to 29 miles for the 65 and overs – with the younger generation likely to be more inclined to travel and have fewer other commitments.

Mode of transport to matches

The car remains the predominant mode of transport for supporters travelling to grounds, with a steady 65% of those surveyed either arriving in their own car or via a lift in someone else's. Clearly, therefore, the burden on car parking spaces – either in street parking around the ground (54%) or in other local car parks (29%) – remains as great as ever. Official club car parks are still only accessed by one in ten of those surveyed.

TABLE
4.3

Travel Mode to matches

Travel mode	2002/03	2003/04	2004/05	2005/06
Bases	28,848	26,722	25,328	24,480
Own car	49%	49%	48%	46%
Lift in a car	20%	21%	20%	19%
Local bus/tube/metro	13%	11%	12%	13%
Train	9%	9%	11%	12%
Walk/cycle	5%	5%	5%	5%
Supporters coach	3%	3%	3%	3%
Park and Ride	1%	1%	1%	1%
Minibus/van	1%	1%	1%	1%

Not surprisingly, the new-built grounds on out-of-town sites score the best in this regard with 30% of **Bolton Wanderers** fans and 43% of **Wigan Athletic** supporters making use of official club car parks at the Reebok and the JJB. This compares to a tiny 1% at such tight, inner city grounds as **Chelsea**, **Fulham** and **Tottenham Hotspur**.

As a result London-based fans tend to be the biggest users of local bus, metro or tube services – firstly, of course, because such convenient transport infrastructure exists, but secondly because of the lack of car parking spaces near the ground. The same is equally true of **Newcastle United** fans making use of the city's metro system.

Time taken to travel to matches

With little change in the mode of transport to matches there is, unsurprisingly, likewise no change in the average travel time to matches – it remains the same as the last survey at 1 hour 14 minutes.

In common with their greater proximity to the grounds, season ticket holders take less time, on average, to get to games (57 minutes) than non-season ticket holders (1 hour 49 minutes) – a pattern that repeats itself in terms of club-by-club differences.

Hence with 79% of **Wigan Athletic** supporters living within ten miles or less of the JJB, their average travelling time is a mere 39 minutes. For the long distance **Manchester United** fans, that same average travelling time is a more gruelling 1 hour 42 minutes.

Matchday companions

In the 2001 survey, the most common matchday companion was another adult friend (56%). Come 2005/06 and nothing has changed – the best mate remains the most likely adult companion of those attending Premier League games (55%). This is particularly true of supporters attending games at **Liverpool**, **Chelsea** and **Arsenal**.

TABLE
4.4

Matchday companions

	2001	2002/03	2003/04	2004/05	2005/06
Bases	29,723	29,087	26,795	25,429	24,540
Adult friends	56%	55%	54%	55%	55%
Other adult family (not partner)	29%	29%	33%	33%	32%
Own children	N/A	26%	26%	28%	29%
Partner/Spouse	20%	20%	20%	20%	21%
Usually alone	10%	10%	10%	10%	8%
Other children	N/A	N/A	N/A	8%	8%
Corporate guests	N/A	N/A	N/A	2%	1%

The most family-orientated club – i.e. the one with the highest average percentage of supporters attending with another adult family member – is **West Bromwich Albion**. That would fit neatly with the fact that the 2005/06 survey has already identified Baggies' fans as among those most influenced by parental behaviour in terms of their reasons for first attending games.

Supporters attending games alone are most prevalent at **Fulham**.

Once again there are certain characteristics that span the gender divide with female supporters far more likely to attend games with their partner/spouse (46% as opposed to 16%) than their male counterparts.

Likewise, age too has a bearing with the younger age groups (16 to 44-year-olds) tending to watch games as part of a group of friends, while the older generation (55-years-old plus) tend to either go alone or be accompanied by an adult family member.

Pre-match arrival/activity

On average supporters arrive at games 25 minutes before kick-off. The difference between the arrival habits of season ticket holders and non-season ticket holders – the former arriving a good nine minutes later than the latter (22 minutes as opposed to 31 minutes) may be down to questions of ticket collection and perhaps the simpler, familiar routines enjoyed by season ticket holders.

Across member clubs there is little variation in arrival times with **Newcastle United** supporters being the last to arrive – on average 19 minutes before kick-off – their relative 'lateness' no doubt helped by the central location of St James' Park in Newcastle.

What the average Magpies' fan does en route is explained by the next question in the survey: What do you usually do prior to going to a home league match?

TABLE
4.5

Pre-match activity

What do you usually do prior to going to a home league match?

	Total	STH	NSTH
Bases	24,508	19,050	5,458
I go straight to the ground	47%	48%	46%
I go to a pub/social club	43%	45%	40%
I go to the club shop	23%	15%	39%
I go to a bar at the ground	18%	17%	21%
I eat outside the ground	17%	14%	23%
I eat inside the ground	13%	11%	18%
I go to a takeaway/café	11%	9%	14%
I go to a friend's/relative's house	8%	7%	9%

And the answer in the case of 58% of **Newcastle United** supporters is 'go to a pub/social club' – a figure only neared by **Chelsea** (56%), **Liverpool** (53%), **Everton** (52%), **Portsmouth** (51%) and **Sunderland** (50%) fans. In part there is a location issue in the sense that the grounds concerned – as opposed to such out-of-town developments as the Reebok (27%) and the JJB Stadium (34%) – have a multitude of drinking establishments close at hand.

One in four supporters visit the club shop – an activity that is actually more than twice as common among non-season ticket holders than season ticket holders (39% of non-season ticket holders as opposed to 15% of season ticket holders). For non-season ticket holders the trip to the club's home ground is more of an occasion than the norm. They also tend to live that much further from the ground and are, it would appear, more likely to kill two birds with one stone.

The uptake of catering opportunities within Premier League grounds shows a degree of variation with supporters of **Everton** (19%) and **Manchester City** (17%) twice as likely to eat inside a ground than fans of **Newcastle United** (8%), **Sunderland** (9%) or **Portsmouth** (9%).

Earlier arrival incentive

Encouraging supporters to arrive earlier at grounds is one way to ensure that their average matchday spend increases if clubs can then persuade their fans to take advantage of in-house catering and merchandising opportunities.

Likewise, it can also ease pressure on matchday parking and turnstile operations if arrival times can be stretched out further.

And for nearly one in two supporters (46%), lowering the price of food and drink would act as an incentive for earlier arrival. Improvements to the pre-match entertainment (34%), an improvement in both the quality of the food and drink on offer (29%) and the concourses on which they would be then consumed (28%) would also entice supporters into an earlier arrival.

And while one in four (23%) insisted that nothing would encourage them to arrive any earlier, the other figures suggest that there is still a targetable 77% of fans who might be tempted to arrive ahead of their current schedule provided the product and, above all, the price were right.

This would appear to be particularly true of the younger generations (supporters aged 16–24) who are likely to be more swayed by the prospect of better pre-match entertainment (44%) and interviews or action displayed on the big screens (29%) than their older counterparts who are likely to be rather more set in their matchday ways.

CHAPTER

5

Fan Attitude and Opinion

This section of the 2005/06 F.A. Premier League National Fan Survey covers five key aspects of the customer experience – the matchday experience itself, the issue of stadium safety, the way supporters contact and connect with their club, their feelings over ticketing arrangements and, finally, their thoughts on the social and community activities undertaken by their club.

Once again, the whole matchday experience proves the number one priority closely followed by stadium facilities and safety, ticketing, customer service and, finally, social and community policy.

In a new departure from last year's survey, we have introduced a new, 'overall' rating to cover all five of the principal areas of concern – bringing together the separate strands of supporter opinion to produce one, single rating mark for each of the Premier League member clubs.

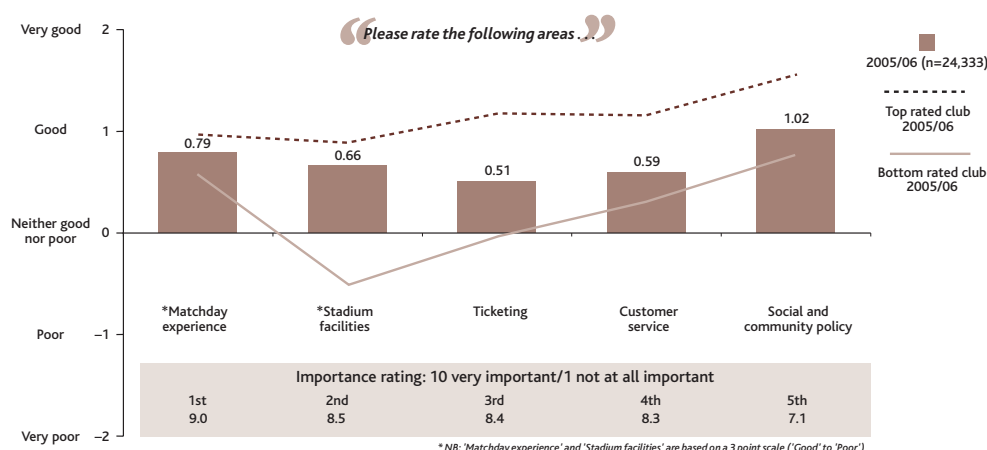
Encouragingly, responses are by and large positive across the board – particularly with regard to social and community issues which ties in with the idea of supporters wanting to see their clubs 'give back' something to the local communities that support them.

The area of greatest variation remains in the realm of stadium facilities and there it remains a clash between the old and the new, between the level of facilities on offer at an ageing Fratton Park compared to those available at the more modern Stadium of Light.

FIGURE

5.1

Fan attitude towards Overall Key Performance Areas 2005/06
(Ranked in order of fan importance)



Going to Matches

Once again, this survey breaks fresh ground – in this instance asking supporters to highlight the best elements of a home match, over and above such traditional key components of the matchday experience as decent sight lines and match elements.

TABLE
5.1

Best match elements

“Thinking about Premier League home matches, what are the best elements of going to a game?”

	First mention	All mentions
Bases	15,665	15,750
Seeing the team play live	69%	91%
The quality of the football	20%	69%
Match action	5%	44%
Being close to the action	2%	33%
Singing/chanting	2%	22%
Meeting family/friends	2%	15%
Match crowds	1%	17%
Stadium facilities	–	8%

For two-thirds of supporters (69%) the key element of experiencing a home match is simply the opportunity to see their team play live. You can't, it seems, ever beat the real thing.

Quality too counts for much with one in five (20%) fans insisting that the quality of the football on offer was another crucial element to their enjoyment of matchdays. Again, this returns to a familiar theme from previous surveys – that when customers are asked to pay good money for their match tickets, they want to see good football by way of a return.

Interestingly, it is **Middlesbrough** supporters who place the highest premium on watching quality football with 34% putting that first among the key elements of a good day out at the football. Next highest is **Blackburn Rovers** on 26%.

The survey also explores why fans don't go to more league matches – home and away.

With such high attendance at home matches amongst our sample, results here only really apply to attendance at away matches and demonstrate the range of influencing factors – ticket cost and availability, family/work commitments, timing of games and travel time and, of course, the opportunity to watch the match live on TV.

TABLE
5.2

Home/Away matches

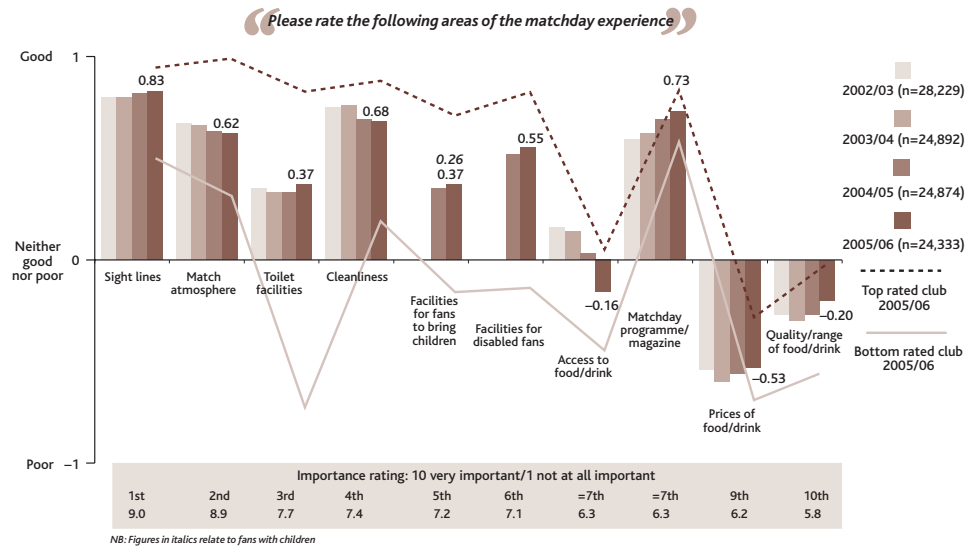
“What prevents you from attending more home or away league matches?”

	Home matches	Away matches
Bases (Fans attending less than ALL home or ALL away matches)	9,486	22,071
Family commitments	38%	37%
Ticket cost	36%	45%
Work commitments	35%	27%
Timing of games	30%	29%
Ticket availability	27%	37%
Travel time	22%	40%
Watch the match live on TV	16%	22%
Travel cost	14%	33%
Watch the highlights on TV	6%	9%
Other	11%	8%

In terms of the whole matchday experience itself, the importance of sightlines, match atmosphere, toilet facilities and cleanliness remain largely unchanged from last year with all four granted far more importance than issues regarding food and drink and the matchday programme.

FIGURE
5.2

Matchday Experience 2002/03–2005/06 (Ranked in order of fan importance)

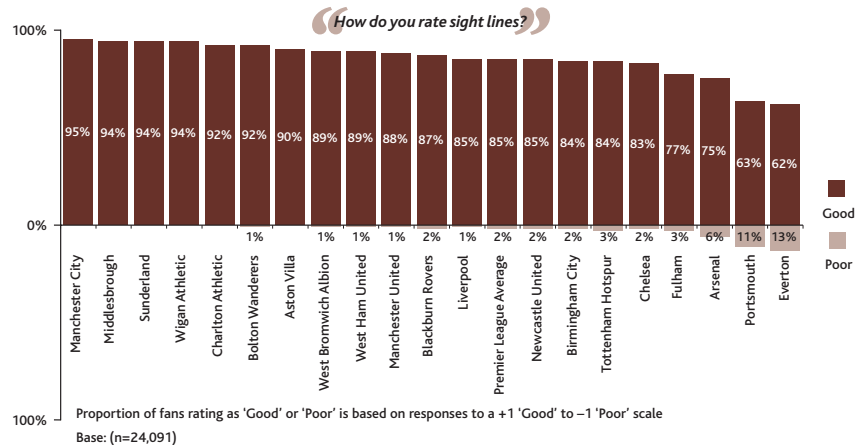


As ever, the biggest negative reaction was reserved for the price of stadium food and drink – albeit this area is not seen as relatively important to fans compared to other areas of the matchday experience.

As was clear from last year's survey, issues such as sight lines and toilet facilities are invariably linked to the age and construction of the stadiums involved. Hence the elderly homes of **Everton** and **Portsmouth** both score below average on the question of sightlines, with **Manchester City's** new Eastlands home topping the survey with a 95% approval rating. **Arsenal's** relatively lowly score will clearly be rectified via their impending move to Ashburton Grove.

FIGURE
5.3

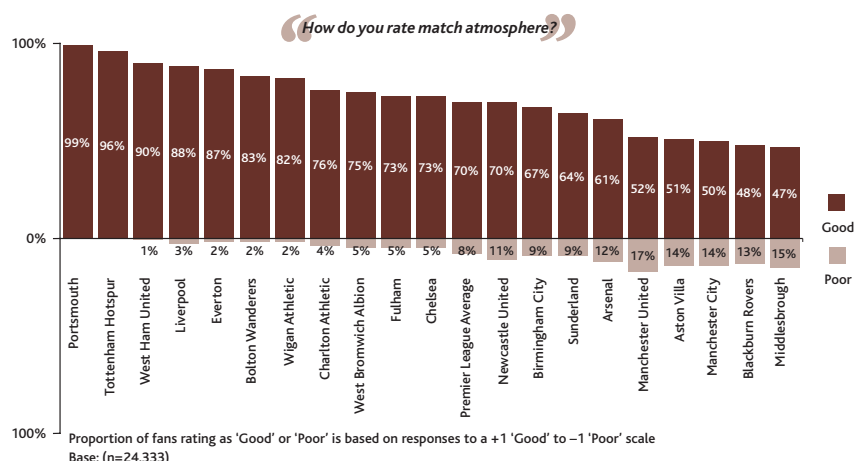
Fan attitude towards Sight Lines



It is a similar story with regard to toilet facilities where **Portsmouth** again hit something of a low note.

And yet here is one of the bigger dilemmas facing Premier League clubs. Because for all its older facilities, the matchday atmosphere at Fratton Park prompts the highest approval rating (99%) with regard to match atmosphere, with **Manchester City** – for all the benefits of their purpose-built new home – trailing with 50%, and with a further 14% actually rating the atmosphere at Eastlands as 'poor'.

FIGURE 5.4 Fan attitude towards Match Atmosphere



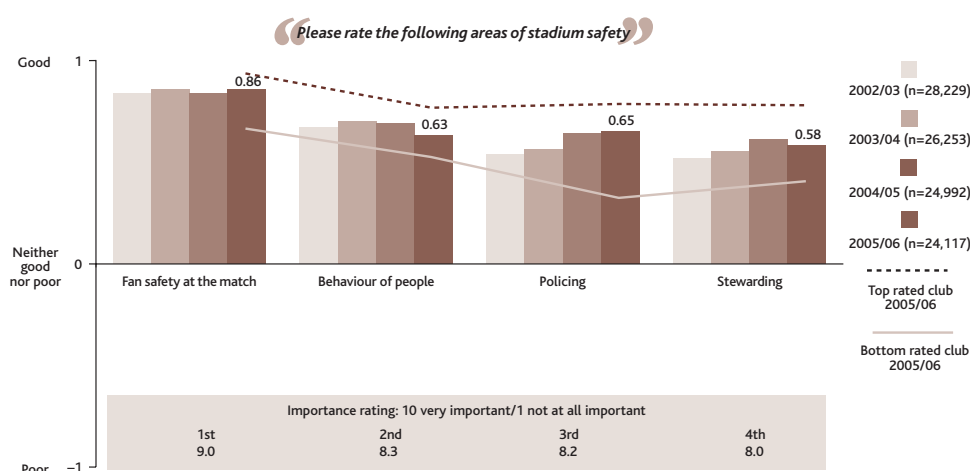
Hitting the balance between generating a great matchday atmosphere and populating a bright, new shiny stadium with similarly impassioned supporters is clearly a tricky task.

The 2005/06 F.A. Premier League National Fan Survey also reveals a higher level of importance among female fans in the areas of cleanliness, toilet facilities and the matchday programme, while – not surprisingly – the fans who attend games with children put a greater emphasis on facilities for kids than their counterparts without.

Stadium Safety

With regard to the issue of stadium safety, the 2005/06 survey produces a set of results and opinions entirely consistent with the last four annual surveys.

FIGURE 5.5 Fan attitude towards Stadium Safety 2002/03–2005/06
(Ranked in order of fan importance)



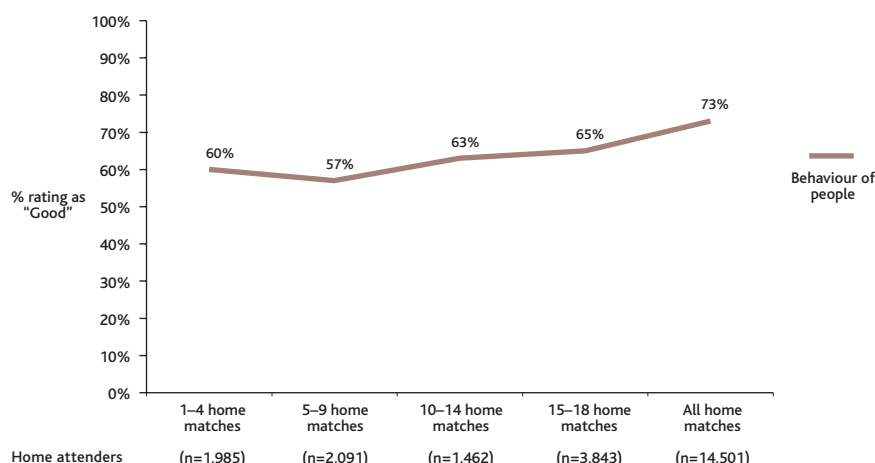
The safety of fans at a Premier League match remains the supporters' number one priority and, encouragingly, it continues to be the area that shows the highest level of positive feedback.

The behaviour of people also attracts positive feedback further supported by the fact that only 1 in 4 supporters had experienced language or chanting which they considered to be offensive – a finding which consistently highlights good behaviour as a majority experience in the Premier League.

Bolton Wanderers and **Blackburn Rovers** emerge top from analysis of the 2005/06 figures – that same 'good' behaviour rating rising according to the number of matches supporters attend. The more games fans go to, the more they appear to recognise consistently good behaviour.

FIGURE
5.6

Fan attitude towards Behaviour of People 2005/06 % rating behaviour of people around them as "Good"



Liverpool produced the most positive feed-back on both the policing and stewarding operations at Anfield.

Broken down to more specific groups, female fans tend to place more emphasis on good policing and stewarding and tend to offer better ratings as a result.

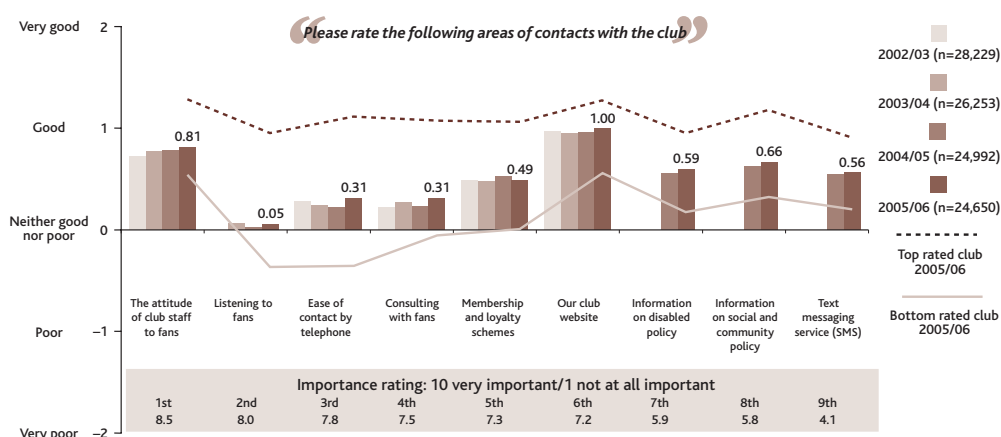
Contacts With The Club

'Contacts with the Club' is the section of the 2005/06 F.A. Premier League National Fan Survey that covers the increasingly important realm of customer service – how successfully or otherwise member clubs communicate news and information to their supporters.

With four years of data to now call upon, the 2005/06 survey is ideally-placed to identify areas of year-on-year improvement and, likewise, spot issues that continue to bedevil supporter-club relationships.

FIGURE
5.7

Fan attitude towards Customer Service 2002/03–2005/06 (Ranked in order of fan importance)

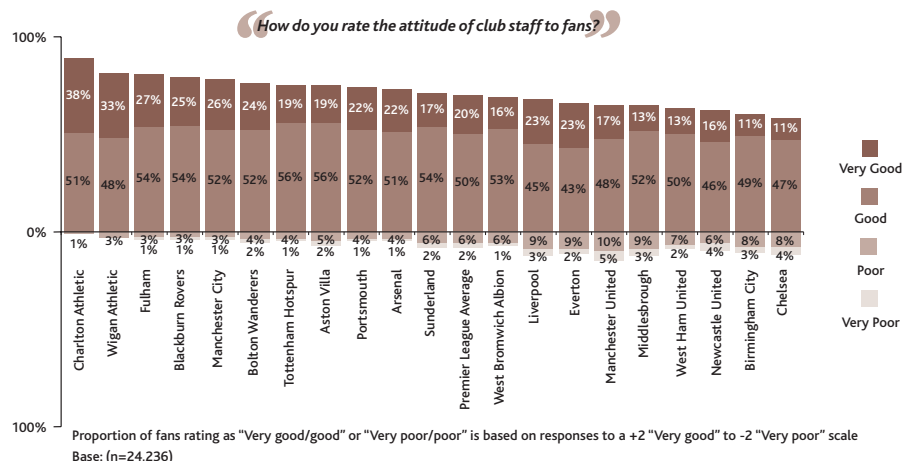


As ever, the most important issue for the supporters is the way that they are treated by club staff – an area that clearly lays at the very heart of any commitment to excellence in customer service.

To the Premier League's credit, this area has seen a steady year-on-year improvement over the course of the last four years suggesting, in turn, that clear and sustained progress has been made.

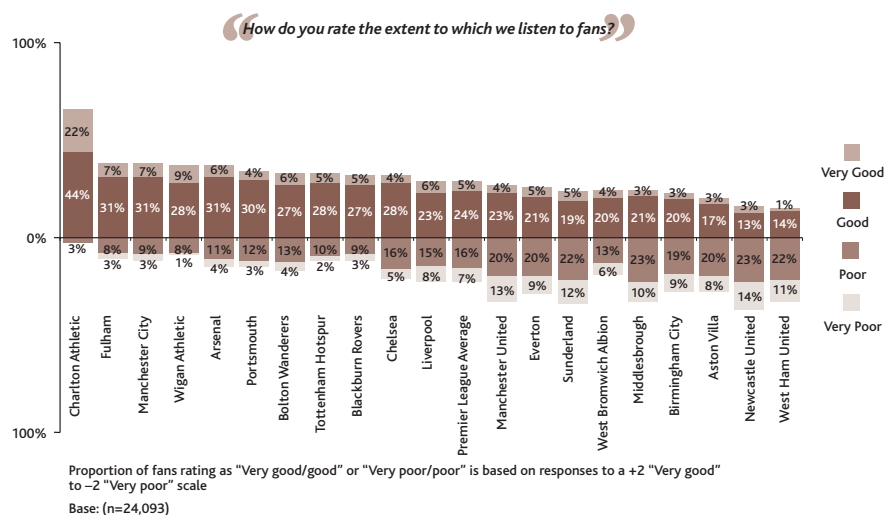
There remain variations between clubs with **Chelsea** and **Birmingham City**, in particular, lagging slightly behind **Charlton Athletic**, **Wigan Athletic**, **Fulham**, **Blackburn Rovers** and **Manchester City**, but it remains worth pointing out that in the case of all 20 member clubs, supporters view the attitude of their club's staff in a positive light.

FIGURE 5.8 Fan attitude towards Club Staff



Charlton Athletic, Fulham, Manchester City and **Wigan Athletic** score high with regard to listening to fans. However, the variation here between individual clubs is even greater than that shown in the attitude of club staff to fans detailed above.

FIGURE 5.9 Fan attitude towards Listening to Fans

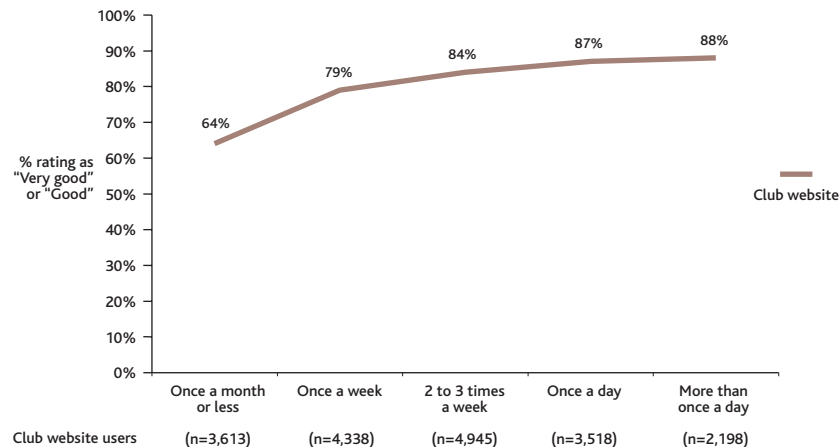


Club websites are generally highly-regarded with far less by way of a variation between individual clubs. Indeed, given the consistently high scores in this regard, it would appear that Premier League members are, on the whole, hitting the right note website-wise.

Certainly those supporters who visit the clubs' official sites on a regular basis view them in an increasingly more positive light. Even among those who visit an official club site once a month or less, 64% still view them as either 'very good' or 'good'.

FIGURE
5.10

Fan attitude towards Club Website 2005/06 % rating Club Website as "Very Good/Good"



Not surprisingly, the younger generation of club supporters – particularly those of the Internet Age (16–24) – view the club websites as more important than those of an older age group. Likewise, they view membership and loyalty schemes as slightly more important too – a reflection, perhaps, of the economic benefits that some of these schemes bring.

Three areas are deemed to be of less importance for fans – clubs text messaging services (SMS), information on social and community policy and disabled policy. That said, however, the overall ratings remain positive and for those, more specific groups with a keen interest in such activities it is likely to remain a key component in the way their lives interact with their football club.

Ticketing

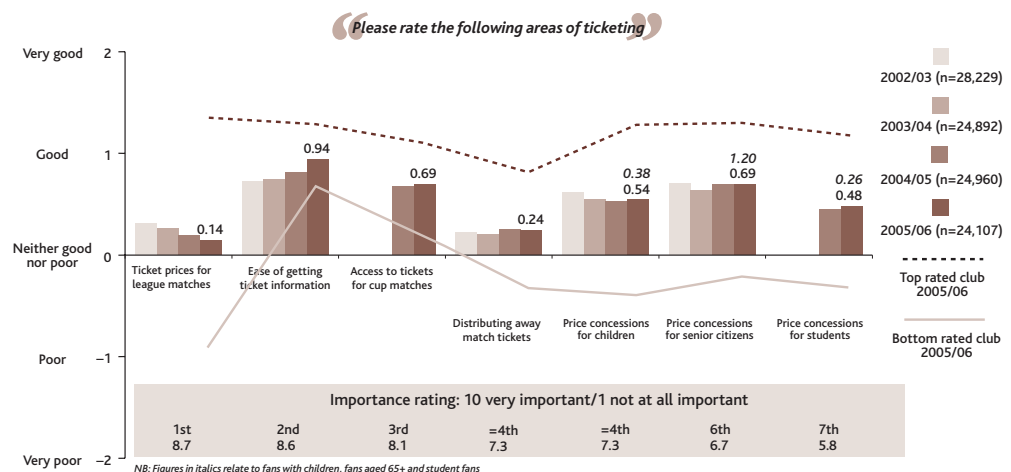
The issue of ticketing covers a broad range of areas – everything from the invariably tricky question of pricing through to the ease and the means of ticket accessibility.

Once again the 2005/06 F.A. Premier League National Fan Survey reveals the mood among fans to be generally upbeat and positive, though as found before, the question of ticket prices remains a vexed one for many supporters.

It is of little surprise, therefore, to discover that ticket prices for Premier League games remains the most important consideration for supporters with the ease of getting ticket information and the availability of tickets for cup matches running a close second and third respectively.

FIGURE
5.11

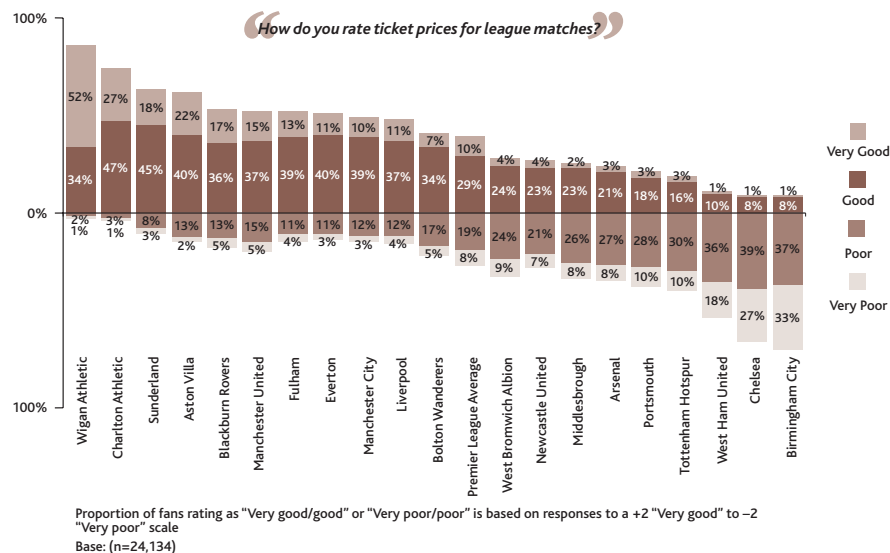
Fan attitude towards Ticketing 2002/03–2005/06 (Ranked in order of fan importance)



As for supporters' attitudes towards ticket prices, that remains essentially indifferent.

Within such a neutral response, lives a wide variation at individual club level. On their first ever visit to the Premier League, **Wigan Athletic** appear to have pegged their prices right in supporters' eyes with 86% of Latics' fans rating their club's pricing structure for the 2005/06 season as either 'Very Good' or 'Good'.

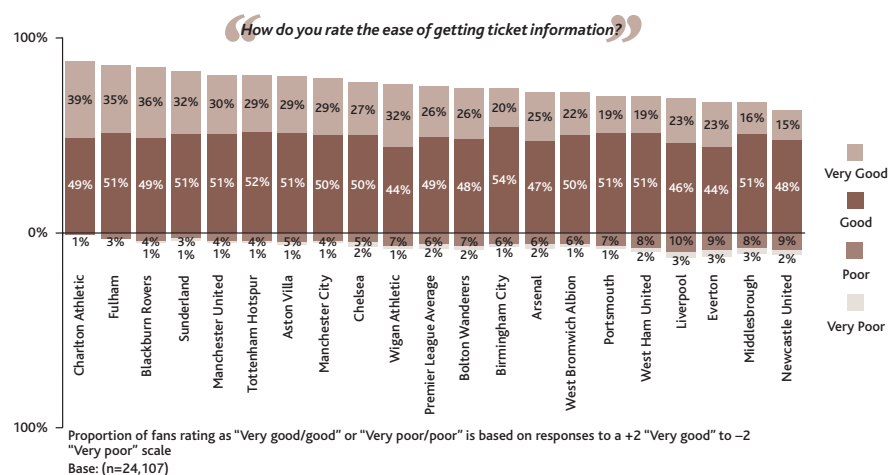
FIGURE 5.12 Fan attitude towards Ticket Prices



Charlton Athletic – consistently recognised as one of the Premier League's foremost 'listening' clubs – also appear to have hit the right note price-wise with 74% of the Addicks' supporters surveyed registering a positive response.

There is, however, more encouragement to be had on the ease of getting ticket information front where 75% of Premier League supporters rate their club in a positive context.

FIGURE 5.13 Fan attitude towards Ease of Getting Ticket Information



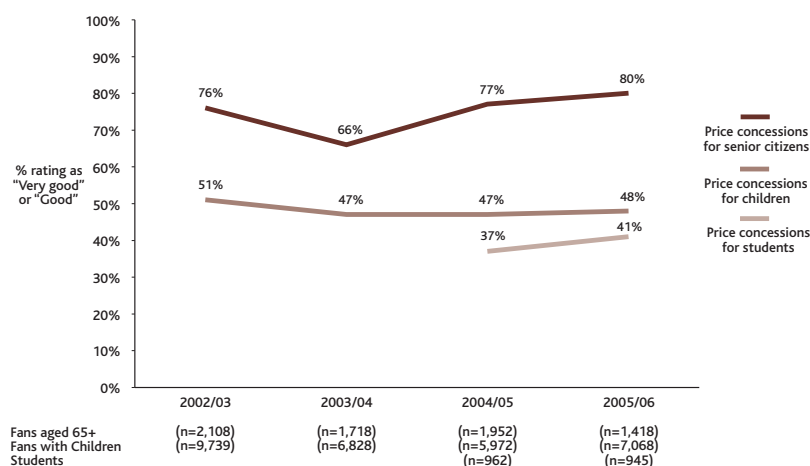
Indeed, while **Charlton Athletic** tops the table there is little significant variation between the best and worst performers suggesting that in this particular regard, Premier League member clubs have been uniformly successful in keeping their customers well informed as to the price and availability of matchday tickets.

A similar positive trend is seen in supporters' attitudes to the ease of access to tickets for cup matches, though – in common with results from the last four years – the distribution of away match tickets remains less well-regarded. Even then, however, there are positives to be found with regular away-day travellers displaying greater satisfaction with their club's ticketing policies than those who travel to away games on a more infrequent basis.

Price concessions remain an important issue for those targeted directly – be they the young, the old, students or those with children. Overall, the elder generation of Premier League supporters appear to be the happiest of the target groups, whilst students and fans with children less so.

FIGURE 5.14

Fan attitude towards Price Concessions 2002/03–2005/06 % rating concessions as "Very Good/Good"



Indeed, among the 65-plus age group the 2005/06 survey reveals record levels of satisfaction with 80% of those surveyed rating their club's performance as either 'Very Good' or 'Good' – perhaps a result of recent efforts on the part of the Premier League to encourage clubs to offer concessions across the board.

One in two supporters with children still see their clubs' price concessions for children in a positive light – though, unlike their senior counterparts, this figure has remained largely static over the last four years. With student opinion very slightly on the rise, overall a case can be made for an improving and encouraging picture.

Social & Community Activities

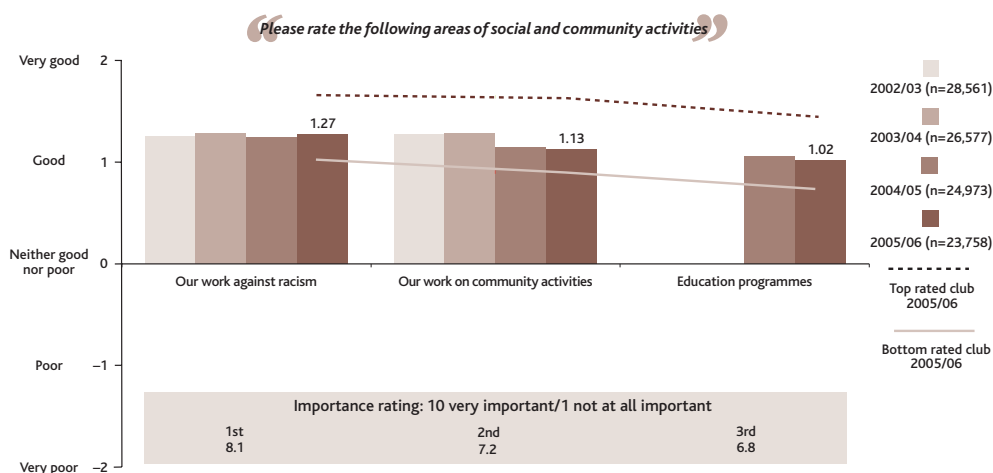
In common with previous studies, the 2005/06 F.A. Premier League National Fan Survey has again underlined the important role member clubs can play both on their own door-step in their relationship with their local, surrounding community and, on a wider level, within society as a whole.

For example, Premier League Reading Stars and club's own schemes provide examples of the positive interaction between Premier League members and their local communities; the Premier League's long-standing commitment to combat racism within the national game likewise being a prime example of the sport working for the wider, social good.

Indeed, football's on-going stand against racism is seen as the most important social and community activity undertaken by Premier League clubs – a position that is backed as strongly as ever by supporters across the country.

FIGURE 5.15

Social and Community Activities 2002/03–2005/06 (Ranked in order of fan importance)

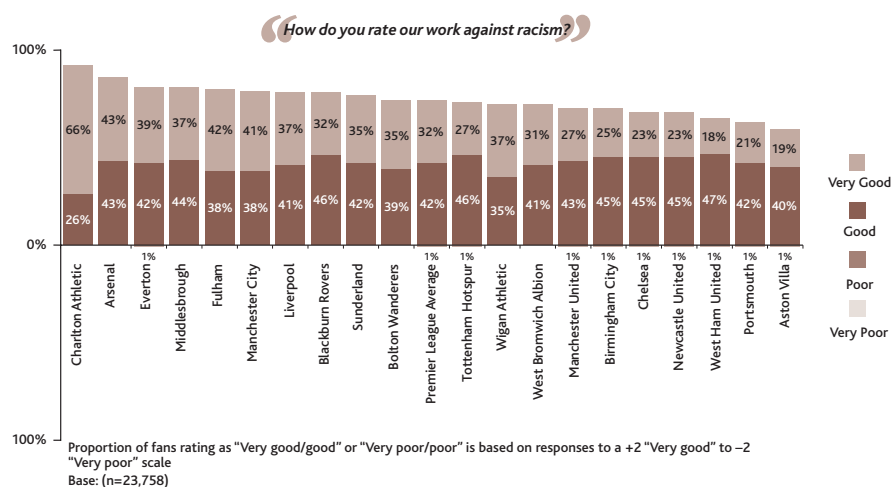


In each area, standards set in previous years have been uniformly maintained with the Premier League's unstinting efforts in the work against racism being particularly well-rewarded with another set of highly encouraging figures.

What is particularly telling in this regard is the 83% of supporters who were able to give an opinion on the success or otherwise of the Premier League's stance on racism, as opposed to the one in three fans who responded in the 'Don't Know' column on community activity issues and the one in two who replied in similar fashion when quizzed over clubs' educational initiatives. Most encouragingly of all, the overwhelming majority of supporters rate club's work in this crucial, social arena as either 'Very Good' or 'Good'.

And that is true the length and breadth of the country. For whilst once again **Charlton Athletic** lead the good fight with 92% of Addicks' fans view their clubs work to combat racism in a positive light, even at the other end of the scale the results are still encouraging with three out of every five **Aston Villa** supporters surveyed believing that the club is sending out the right anti-racism messages.

FIGURE 5.16 Work Against Racism



For the second year fans were asked to assess the role and value of educational programmes and, once again, they were uniformly greeted with a positive response. As ever, the impression remains that supporters consistently and whole-heartedly warm to any sign of their local club giving something back to their surrounding communities.

Delving slightly deeper into the figures, female respondents were particularly keen on any aspect of social and community activity – and are, likewise, more likely to reward clubs with higher mean scores for initiatives in this regard.

There is, also, a generational aspect to the results too with the younger generation (16 to 24-years-old) equally keen on this area of club activity compared to any of their peer age groups. This may reflect the fact that, in every likelihood, it is those of the most recent generation of Premier League supporters who will have first-hand experience of clubs and communities interacting together in such a wholly positive and beneficial fashion.

CHAPTER

6

Fan Expenditure

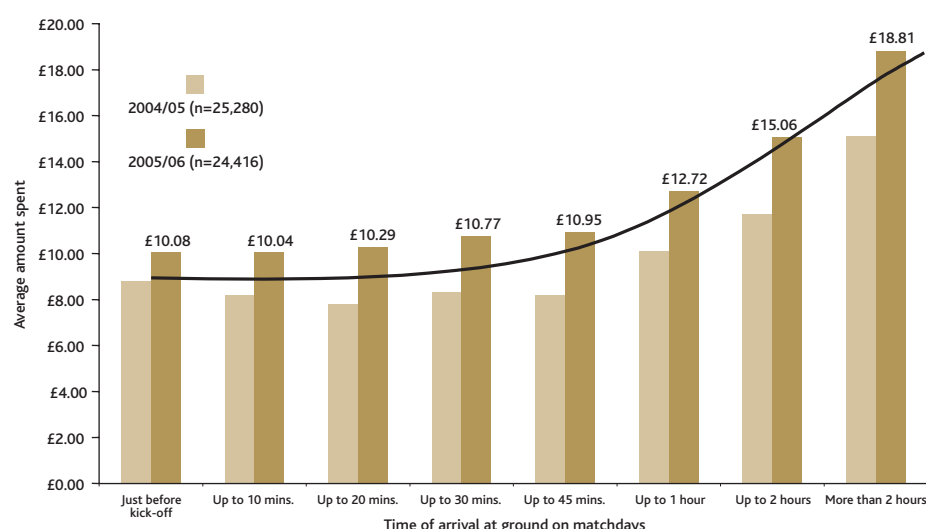
Matchday Expenditure

This section of the 2005/06 F.A. Premier League National Fan Survey takes a more detailed look at fans' spending habits on their arrival at the ground.

Not for the first time, this survey demonstrates the clear relationship between supporters' time of arrival and their likely spending patterns – in short, that the longer they are in the ground, the more money they are likely to spend.

FIGURE
6.1

Average spend per match and time of arrival



Among those supporters that spend money on drinks, snacks and a bet before a match, the average amount of money spent just before kick-off is £10 compared to the £19 average spend of those fans that arrive more than two hours in advance of kick-off.

As ever, the commercial benefits of enticing supporters into grounds early are abundantly clear.

And what would make your average Premier League club supporter change his matchday habits and arrive that extra, say, half-hour early? Exactly the same things that have always enticed a fan to arrive early – better value for money in terms of the food and drink on offer and a better pre-match entertainment package. That message never changes.

It remains the case that those supporters with children aged between 6 and 15 are perhaps most responsive to certain enticements, for example, 42% would arrive earlier were better pre-match entertainment available, and 37% if there were more for children to do.

TABLE
6.1

Early arrival enticements

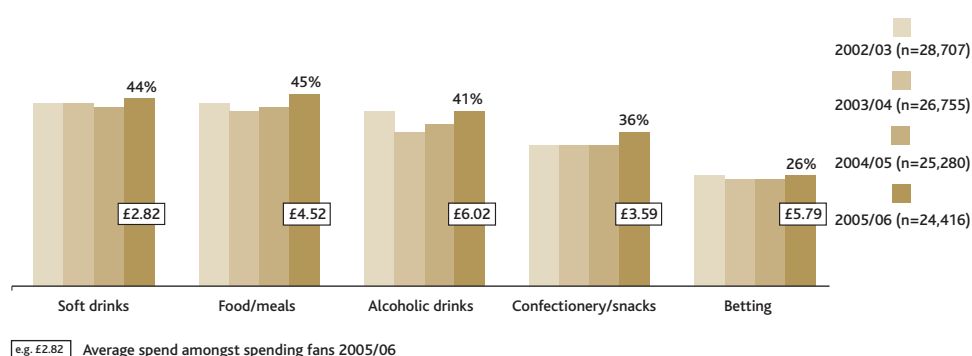
	2002/03	2003/04	2004/05	2005/06
Bases	28,627	26,500	25,179	24,361
Lower prices for food and drink	45%	44%	46%	46%
Better pre-match entertainment	38%	38%	38%	34%
Better food and drink	31%	31%	31%	29%
More comfortable concourses	30%	30%	29%	28%
Better bars and kiosks	30%	29%	30%	28%
Wider range of food and drink	25%	25%	25%	24%
Interviews/highlights on screen	25%	26%	25%	22%
More bars and kiosks	19%	19%	19%	17%
More for children to do	10%	10%	9%	10%
None of these	22%	23%	23%	23%

What are supporters spending their money on? Soft drinks, food and meals remain the most popular items of spend, though spending on alcohol is on the rise – up 3% on last year's survey with 41% of supporters surveyed now buying an alcoholic drink as opposed to the 44% who buy a soft drink.

Betting is up only slightly at 26%. That may still tally with the wider growing trend of sports betting as this boom comes in Internet sports betting, as opposed to that on stadium concourses on matchdays.

FIGURE
6.2

Proportion of fans buying matchday items



Year-on-year figures show expenditure on consumable items rising exceptionally fast with a 26% increase in the average matchday spend of £11 (compared to £8.70 in 2004/05).

TABLE
6.2

Average matchday expenditure

Year	% of fans buying consumable items	Average spend per match	Year on year % change
2005/06 (n=24,416)	78%	£11.00	+26%
2004/05 (n=25,280)	76%	£8.70	+12%
2003/04 (n=26,755)	78%	£7.80	+5%
2002/03 (n=28,707)	81%	£7.40	

Clearly given the greater spend patterns evident in those that arrive at grounds earlier, Premier League member clubs could be looking at building in new enticements to their whole matchday package. And yet while, on the one hand, the 2005/06 survey again highlights supporters' wishes for better value in terms of the food and drinks on offer, on the other, it seems likely that supporters are paying more for the same items – witnessed in that 26% year-on-year change.

All of this might suggest that the future lies not in food, but in entertainment – possibly greater use of big screen technology to relay pre-match interviews or offer highlights packages from previous seasons or games.

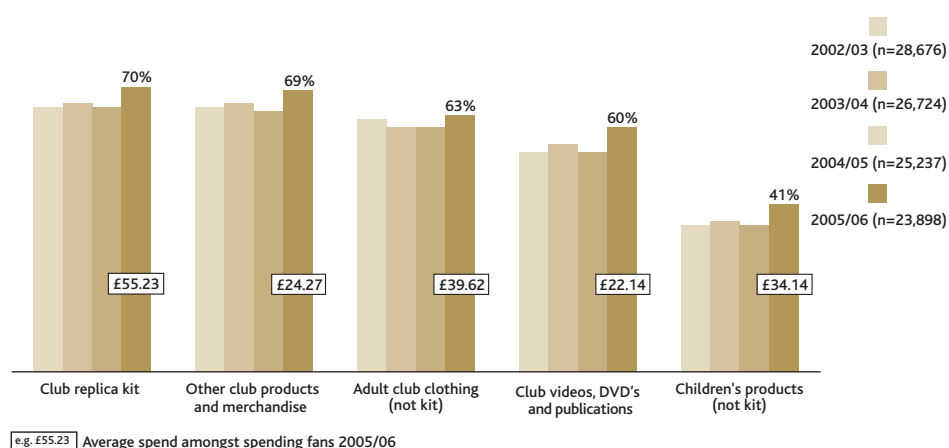
Merchandise Expenditure

Once again the continuing success of the replica kit is underlined by the results of the 2005/06 survey. It is still clearly a 'must-have' item of clothing for a large proportion of supporters.

For while 69% of fans buy some form of club product or merchandise, other than those specified in the survey, and 63% buy other items of adult club clothing, 70% of those supporters surveyed have bought club replica kit at an average spend of £55.23.

FIGURE
6.3

Proportion of fans buying merchandise items



Interestingly, non-season ticket holders appear more wedded to buying club replica kit than season ticket holders (74% of non-season ticket holders as opposed to 68% of season ticket holders) – this, perhaps, a reflection of their need to more publicly demonstrate their club support.

With a 6% rise in those supporters buying club videos, DVD's and publications and a further 41% buying children's products other than kit, it is not surprising to discover that, overall, nine out of ten (92%) Premier League supporters purchase some sort of club merchandise.

And across the board, that trend is growing, albeit slowly – with average spend per season up £8 or 7% year on year from £109 in 2004/05 to £117 in 2005/06.

TABLE
6.3

Average merchandise expenditure

Year	% of fans buying merchandise items	Average spend per season	Year on year % change
2005/06 (n=23,898)	92%	£117	+7%
2004/05 (n=25,237)	90%	£109	+1%
2003/04 (n=26,724)	90%	£108	–
2002/03 (n=28,676)	91%	£108	

Much like the issue of pre-match encouragements to get supporters to arrive at grounds early, innovation would appear to be the key requirement in the field of merchandise expenditure – be that in terms of the design of existing products or be it in bringing wholly new items of merchandising within reach of a remarkably loyal and consistent customer base.

The other area of interest lies in the growing market for children's merchandise – up 5% on last year, with nearly eight in ten (76%) supporters with children aged 6–10 years tapping into the child product ranges offered by their clubs.

CHAPTER

7

TV and Internet

Given the crucial role that television and, increasingly, the Internet enjoys within the modern game, this section of the survey ought to make fascinating reading for all concerned.

The survey covers such 'hot' topics as the volume and timing of live matches on TV, the penetration levels of satellite, cable and Freeview as well as supporters' relationship with the Internet – be it in terms of sites they visit or, equally, the frequency and length of those visits.

Football and TV

The 2005/06 survey has added new questions this year to cover some of the more problematic areas of TV usage – in particular with regard to kick-off times and the subsequent re-scheduling of games.

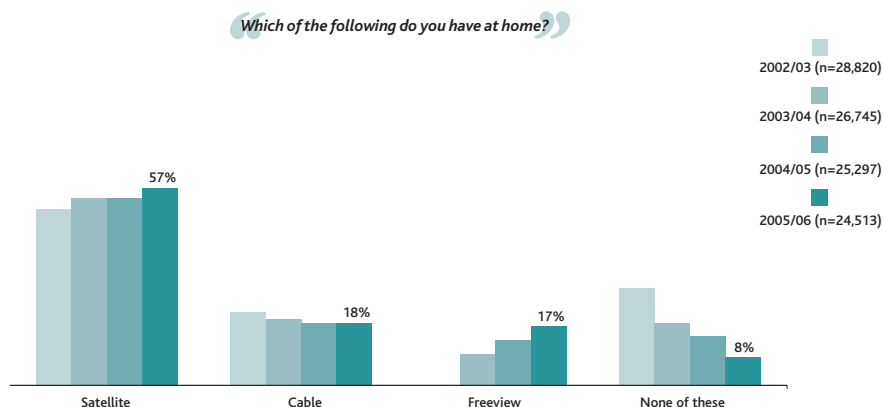
Platform Access

Over the course of this and the previous three surveys there has been one, clear winner in terms of the competing access platforms – Freeview.

For while access to satellite (57%) and cable (18%) has remained relatively static, 17% of supporters surveyed now have access to Freeview – up from 13% in the last survey and 9% on the one before. As a result only 8% of those surveyed now access none of these services – down from 28% less than four years ago.

FIGURE
7.1

TV Platform



Variation continues from club to club with satellite adoption being particularly pronounced among **Chelsea** (65%), **Manchester United** (64%) and **West Ham United** (63%) supporters – as opposed to an average uptake of 57% – while in the cable market, **Portsmouth** (28%), **Birmingham City** (25%), **Aston Villa** (25%) and **Wigan Athletic** (23%) lead the way.

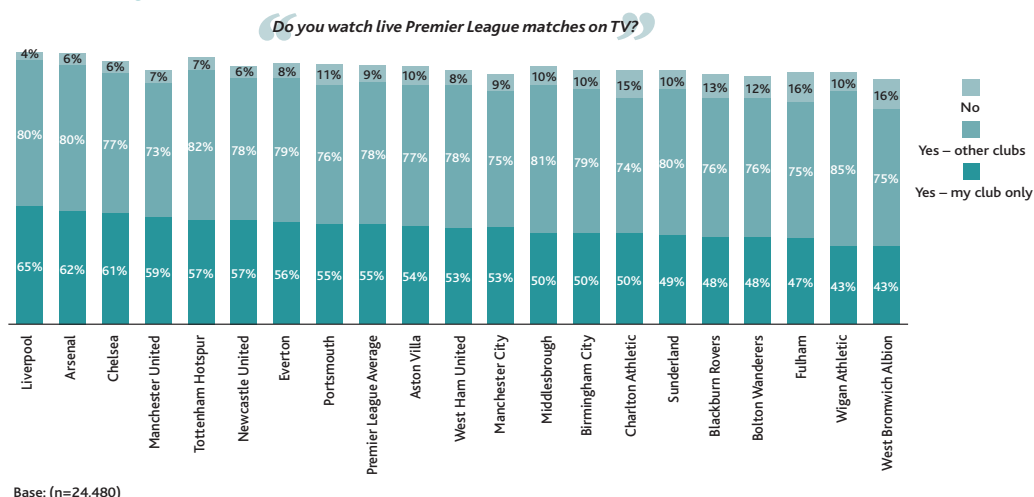
Overall, however, Freeview (17%) is now neck and neck with cable (18%) and, on current trends, penetration could overtake cable in the 2006/07 survey.

Live Premier League matches on TV

The overwhelming majority of Premier League supporters watch live Premier League matches on TV – in fact nine out of every ten supporter surveyed confirming the continuing success of the Premier League 'brand' in this regard.

FIGURE 7.2

Premier League matches on TV



Certain supporters admit to a further degree of 'brand loyalty' in that fans of **Liverpool**, **Arsenal** and **Chelsea** are more wedded than most to watching their club and their club only, though overall 78% will watch other clubs in action.

The three clubs with the most reluctant live TV audience are **Fulham**, **West Bromwich Albion** and **Charlton Athletic** of whose fans surveyed 16%, 16% and 15% respectively did not watch any live Premier League football.

Moving on from simple satellite or cable subscription services, a further 20% of all fans that took part in the survey have purchased a pay-per-view season ticket this season while 27% have purchased a pay-per-view single match ticket – albeit over half (53%) of the fans asked have purchased neither.

Wide variations exist between clubs with 28% of **Manchester United** fans having signed up for a PPV season ticket compared to just one in ten of **Wigan Athletic** fans. This could quite easily correlate to ticket demand – particularly away from home where for United fans the chance to see their heroes in action is likely to be far more restricted than for travelling Latics fans.

Saturday 3pm policy

This was a new question for the 2005/06 survey that asked whether supporters agreed with the policy not to screen live matches at 3pm on a Saturday due to concern that it could affect attendance at grass roots or lower league level – 71% of supporters back the policy.

While a degree of variation between clubs exists – from 84% of **Blackburn Rovers** supporters backing such a policy to 61% of **Manchester United** fans – there is nevertheless widespread agreement that screening games live at 3pm on a Saturday afternoon would have a detrimental effect on the overall well-being of the national game.

Favourite kick-off times

Handed the chance to schedule live football matches themselves, 47% of supporters felt that the 4.05pm slot on a Sunday afternoon fitted their life-style wishes best followed by the late Sunday lunchtime slot of 2pm (17%).

Volume of 'live' football on TV

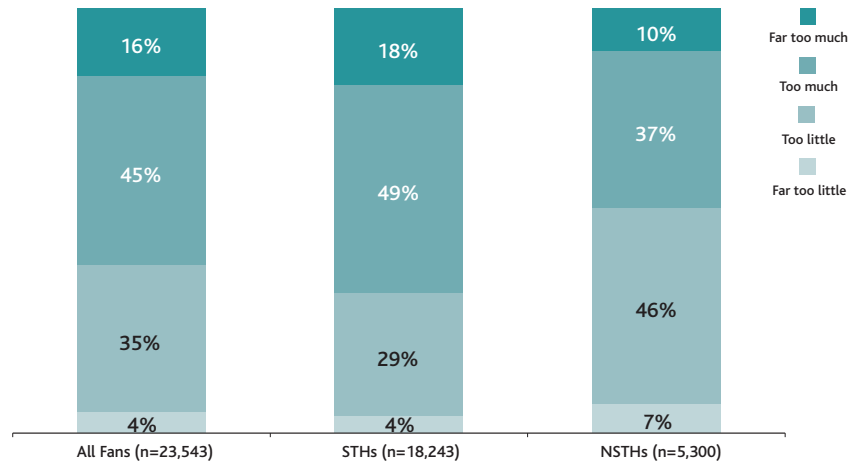
A high proportion of Premier League fans feel that there is currently either too much or far too much live football shown on TV (61% versus 39%).

Perhaps the greatest discrimination comes between season ticket holders and the more casual match attenders – the former tending to think there is too much, whilst the latter slightly too little, which suggests the present number is about right.

FIGURE
7.3

Amount of Live Football on TV

“What do you think about the total amount of 'live' football which has been on TV this season?”



On average, supporters watch five live Premier League matches on TV a month – a figure which is remarkably consistent across all Premier League clubs.

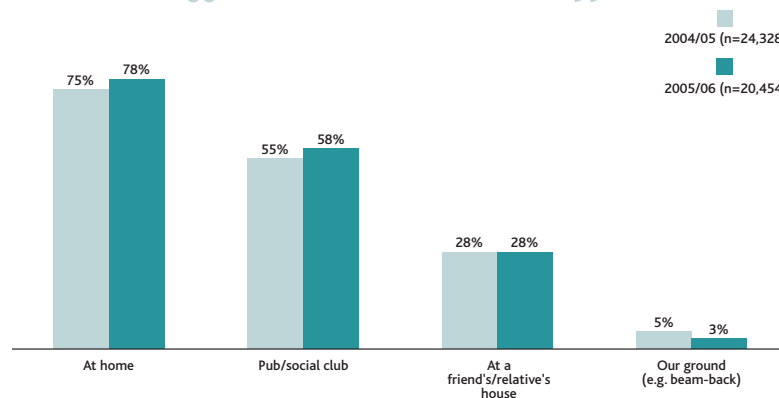
Where do they watch live games?

The two most popular destinations to watch live Premier League football remain the same as ever – at home (78%) and at the pub or social club (58%). Both show a very slight rise year on year, whilst watching at a friend's or relative's house remains static at 28%.

FIGURE
7.4

TV Match Venue

“Where do you watch live Premier League matches on TV?”

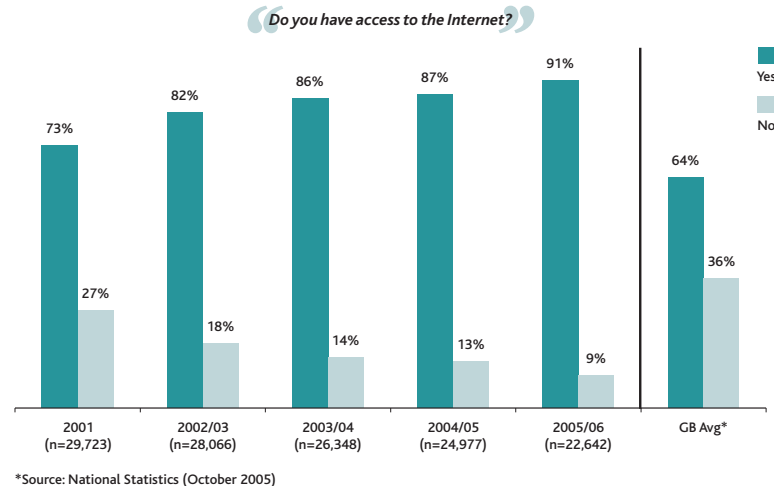


Football and the Internet

As expected, supporters access to the Internet continues to grow year after year with 91% of those supporters quizzed this year now having access to the Internet – up from 73% in 2001.

Interestingly, the average football supporter continues to out-perform the national UK average by a considerable margin with the latest National Statistics (October 2005) putting the Internet take up rate for the country as a whole at just 64% of all GB adults aged 16 and over.

FIGURE 7.5 Internet Access



The 2005/06 survey also reveals the active interest that 91% has – 79% of those that have Internet access have used this over the course of the last week specifically for football reasons.

And that 91% is only an average – a remarkable 99% of **West Ham United** fans have access to the Internet, likewise 98% of **Birmingham City** supporters. Though **Blackburn Rovers** supporters (85%) and **Wigan Athletic** fans (85%) may trail in the Premier League stakes, they remain well ahead of the national average.

As for where supporters access the Internet, 81% now have access at home – a rise from 66% in 2002/03 – while over half can also access the Internet from their place of work.

Likewise one in five fans reveal they can now access the Internet via their mobile phone – further evidence that a whole new platform for football information is evolving before our eyes. Football is coming to people's mobile phones. The Premier League will, literally, be in the palm of everyone's hand.

TABLE 7.1 Internet Access Location

“Do you have access to the Internet...”

	2002/03 (n=28,537)	2003/04 (n=26,608)	2004/05 (n=25,129)	2005/06 (n=22,642)
At home	66%	71%	74%	81%
At work	46%	47%	47%	53%
Via mobile phone	13%	16%	16%	20%
At friend's/relative's house	10%	11%	10%	9%
At school/college	6%	6%	5%	4%
No Internet access	18%	14%	13%	9%

Internet usage for football information

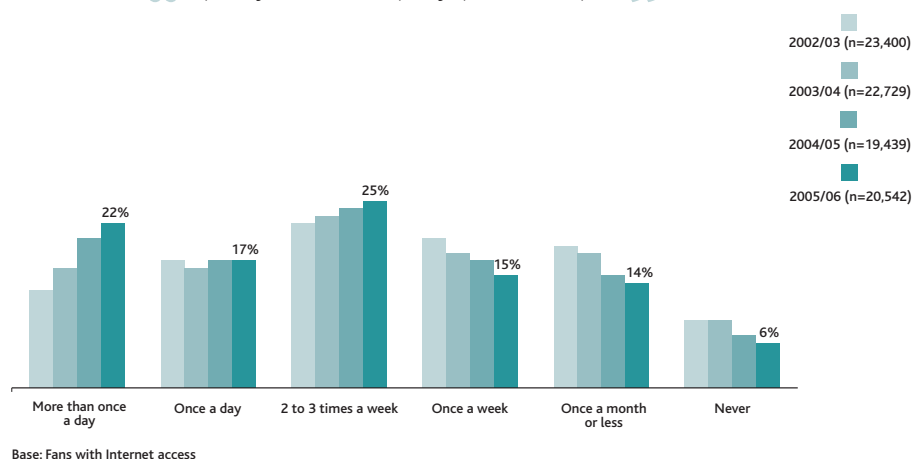
Just as Internet access is becoming more widespread, so too is the frequency with which people search the Internet for their football information. From 13% revealing that they search the world-wide web for football info more than once a day in 2002/03, 22% now do the same in 2006.

Add that to the 17% who surf the Internet once a day and the further 25% who do so two or three times a week, then approaching two thirds of fans with Internet access regularly use (more than once a week) the Internet for football news.

FIGURE
7.6

Internet Use for Football Information

How often do you use the Internet for any information about football?



Official club website usage

Club websites remain well used with 27% of those with Internet access revealing that they visit their club's official website at least once a day – if not more.

Liverpool and **Everton** fans are the most frequent users of their club's official websites and are duly rated among the best official club websites by their fans.

Other websites visited

Once again www.bbc.co.uk emerges as a firm favourite among fans for football information with 44% of those supporters with Internet access visiting the BBC site at least once a month followed by www.skysports.com on 41%.

premierleague.com

Usage of premierleague.com remains steady at 8% of our overall sample with internet access. Importantly, usage amongst younger fans (aged up to 24 years) more than doubles (to 18%), suggesting that The Premier League's own website is a useful portal for this group of supporters.

Future usage

As for the future, fans surveyed for the 2005/06 F.A. Premier League National Fan Survey appear to have lost little of their appetite for the Internet with 76% of fans anticipating that they will use the web in the future to keep up with, first and foremost, club news and thereafter issues related to ticket availability and purchase. The Internet looks set to be an integral part of the football landscape for many years to come.



APPENDICES

Acknowledgements

SMRC *SportsWise* Ltd would like to take this opportunity to thank all fans that participated in the survey for their time in completing the questionnaire and returning it to us for analysis purposes.

We would also like to thank the F.A. Premier League and the Clubs themselves for their assistance in making fan databases available for survey sampling and for their general contribution to questionnaire design.

For further information on this survey please contact:

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Every possible care has been taken to ensure that the information given in this publication is accurate and whilst the F.A. Premier League would be grateful to learn of any errors, we regret we cannot accept any responsibility for loss thereby caused.

F.A. PREMIER LEAGUE FAN SURVEY QUESTIONNAIRE 2005/06

(Club) is taking part in the 2005/06 F.A. Premier League (FAPL) National Fan Survey. This survey is an opportunity for you as a fan to express your feelings and opinions. We ask a number of questions about you, your club, the Premier League, and how you would like to see the game progress.

SportsWise SportsWise, an independent sports research company, is conducting the survey on our behalf and your contact details have been provided to them for this sole purpose. They will produce a report for us on exactly what our fans say. They will also publish a summary document for the Premier League, which will be available at www.premierleague.com towards the end of the season. All your answers will be held in the strictest confidence and will not in anyway be attributable back to you personally, or passed to any third parties, unless you state otherwise at the end of this questionnaire.

Win Matchday Hospitality at a Premier League Match!!

All questionnaires returned within 2 weeks of receipt will go into a prize draw to win matchday hospitality for 2 at a Premiership match this season.
To enter, please TICK THIS BOX ☐

This questionnaire is easy to complete. Just follow the instructions and read each question carefully before answering. Follow the question numbers and TICK WITHIN THE BOX IN BLUE OR BLACK INK. On completion, please return the questionnaire in the REPLY PAID ENVELOPE provided and post it within TWO WEEKS of receipt.

A. Patterns of Attendance

- Looking at this list, what if any is your involvement with our club? (Tick as MANY boxes as you need)

Season ticket holder <input type="checkbox"/>	Member of football club <input type="checkbox"/>
Member of a supporters club <input type="checkbox"/>	An occasional attender <input type="checkbox"/>
Sponsorship / corporate activity <input type="checkbox"/>	FSF member <input type="checkbox"/>
Shareholder in club <input type="checkbox"/>	Don't go but check results <input type="checkbox"/>
- How many of our F.A. Premier League matches do you usually attend in a season? (Tick ONE box in each row)

At home	None <input type="checkbox"/>	1-4 <input type="checkbox"/>	5-9 <input type="checkbox"/>	10-14 <input type="checkbox"/>	15-18 <input type="checkbox"/>	All <input type="checkbox"/>
Away	None <input type="checkbox"/>	1-4 <input type="checkbox"/>	5-9 <input type="checkbox"/>	10-14 <input type="checkbox"/>	15-18 <input type="checkbox"/>	All <input type="checkbox"/>
- IF YOU DO NOT ATTEND ALL HOME LEAGUE MATCHES; What prevents you from attending more F.A. Premier League home matches? (Tick as MANY boxes as you need)

Ticket cost <input type="checkbox"/>	Travel cost <input type="checkbox"/>
Travel time <input type="checkbox"/>	Watch the match live on TV <input type="checkbox"/>
Timing of games <input type="checkbox"/>	Watch the highlights on TV <input type="checkbox"/>
Family commitments <input type="checkbox"/>	Work commitments <input type="checkbox"/>
Ticket availability <input type="checkbox"/>	Other <input type="checkbox"/>
- IF YOU DO NOT ATTEND ALL AWAY LEAGUE MATCHES; What prevents you from attending more F.A. Premier League away matches? (Tick as MANY boxes as you need)

Ticket cost <input type="checkbox"/>	Travel cost <input type="checkbox"/>
Travel time <input type="checkbox"/>	Watch the match live on TV <input type="checkbox"/>
Timing of games <input type="checkbox"/>	Watch the highlights on TV <input type="checkbox"/>
Family commitments <input type="checkbox"/>	Work commitments <input type="checkbox"/>
Ticket availability <input type="checkbox"/>	Other <input type="checkbox"/>
- How far away from our home ground do you live now? (PLEASE WRITE IN NUMBERS e.g. 0 1 2 miles)

I live about miles from the ground.
- For how long have you been attending our football matches? (Tick ONE box only)

Less than 1 year <input type="checkbox"/>	5 - 14 years <input type="checkbox"/>	Over 25 years <input type="checkbox"/>
1 - 4 years <input type="checkbox"/>	15 - 24 years <input type="checkbox"/>	Never attended <input type="checkbox"/>
- What made you start going to matches? (Tick as MANY boxes as you need)

Parental influence <input type="checkbox"/>	It's my local Club <input type="checkbox"/>
The Club is successful <input type="checkbox"/>	Family / friends wanted me to come <input type="checkbox"/>
Good stadium facilities <input type="checkbox"/>	I watched the team play on TV <input type="checkbox"/>
The way the team plays <input type="checkbox"/>	More free time to go <input type="checkbox"/>
To see a particular player <input type="checkbox"/>	Other <input type="checkbox"/>

B. Attending Home League Matches

- Who is usually with you when you attend our home league matches? (Tick as MANY boxes as you need)

Adult friends <input type="checkbox"/>	Other adult family <input type="checkbox"/>	Corporate guests <input type="checkbox"/>
Partner / spouse <input type="checkbox"/>	My children <input type="checkbox"/>	
Usually alone <input type="checkbox"/>	Other children <input type="checkbox"/>	
- How do you usually travel to our home league matches? (Tick ONE box only)

I walk / cycle all the way <input type="checkbox"/>	Park & Ride <input type="checkbox"/>
I get a lift in a car <input type="checkbox"/>	In my own car all the way <input type="checkbox"/>
On a supporters' coach <input type="checkbox"/>	In a minibus / van <input type="checkbox"/>
By local bus / tube / metro <input type="checkbox"/>	By train <input type="checkbox"/>
- If you drive or get a lift to our home league matches, where do you usually park? (Tick ONE box only)

Football Club car park <input type="checkbox"/>	Park & Ride <input type="checkbox"/>
On street near the ground <input type="checkbox"/>	Other local car park <input type="checkbox"/>
NCP <input type="checkbox"/>	At friend's / relative's house <input type="checkbox"/>
- How long does it usually take to travel from where you live to our home matches? (PLEASE WRITE IN NUMBERS e.g. 0 2 hrs 0 5 mins)

It takes me hours minutes to travel to home matches.
- What do you usually do prior to going to a home league match? (Tick as MANY boxes as you need)

I go to a pub / social club <input type="checkbox"/>	I go to the club shop <input type="checkbox"/>
I go straight to the ground <input type="checkbox"/>	I eat inside the ground <input type="checkbox"/>
I go to a friend's / relative's house <input type="checkbox"/>	I eat outside the ground <input type="checkbox"/>
I go to a takeaway / café <input type="checkbox"/>	I go to a bar at the ground <input type="checkbox"/>
- How long before kick off do you usually get into the ground for home league matches? (Tick ONE box only)

Just before kick off <input type="checkbox"/>	Up to 45 minutes before <input type="checkbox"/>
Up to 10 minutes before <input type="checkbox"/>	Up to 1 hour before <input type="checkbox"/>
Up to 20 minutes before <input type="checkbox"/>	Up to 2 hours before <input type="checkbox"/>
Up to 30 minutes before <input type="checkbox"/>	More than 2 hours <input type="checkbox"/>
- Which of the following, if any, would make you come to the ground earlier? (Tick as MANY boxes as you need)

Better bars / kiosks <input type="checkbox"/>	More bars / kiosks <input type="checkbox"/>
Better food / drink <input type="checkbox"/>	More things for children to do <input type="checkbox"/>
Lower prices for food / drink <input type="checkbox"/>	Wider range of food / drink <input type="checkbox"/>
Interviews / highlights on screen <input type="checkbox"/>	More comfortable concourses <input type="checkbox"/>
Better pre-match entertainment <input type="checkbox"/>	None of these <input type="checkbox"/>

C. The Matchday Experience

11. We would like to know what you think about the following at home matches. Please rate **each issue** on a scale of good to poor, then rate the level of importance you attach to **each issue** on a scale of 1 to 10, where 10 means very important and 1 means not at all important. (Please tick ONE box in the first section, then WRITE CLEARLY INSIDE THE BOX the level of importance out of 10 for **each issue** in the last column)

	Good	Neither Good nor Poor	Poor	Don't know	Level of importance
Match atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The quality / range of food / drink	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prices of food / drink	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to food / drink	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleanliness of the area around you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sight lines of the game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Matchday programme / magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toilet facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities for fans to bring children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities for disabled fans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall matchday experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. And thinking about safety / security in our stadium, what do you think of the following?

	Good	Neither Good nor Poor	Poor	Don't know	Level of importance
Fan safety at the match	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stewarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behaviour of people around you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall stadium facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

E. Club Services and Facilities

14. Apart from the matchday experience, what do you think about the way we treat you as a supporter and customer? Please rate **each issue** on a scale of very good to very poor, then rate the level of importance you attach to **each issue** on a scale of 1 to 10, where 10 means very important and 1 means not at all important. (Please tick ONE box in the first section, then WRITE IN the level of importance out of 10 for **each issue** in the last column)

	Very Good	Good	Neither Good nor Poor	Poor	Very Poor	Don't know	Level of importance
Contacts with the Club							
The attitude of club staff to fans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of contacting us by telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ways of consulting with fans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our membership and loyalty schemes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The extent to which we listen to fans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our club website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our text messaging service (SMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information on our disabled policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information on our social and community policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticketing							
Ease of getting ticket information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ticket prices for league matches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distributing away match tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to tickets for cup matches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket price concessions for children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket price concessions for senior citizens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket price concessions for students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall ticketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social and Community							
Our work against racism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our work on 'community' activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall social and community policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

F. Football Spending

15. At any one home league match, on average, how much do you spend on each of the following items in total in the ground? (Tick ONE box in each row)

	Don't buy	Up to £2.99	£3-£5.99	£6-£9.99	£10+
Confectionery / snacks (e.g. crisps)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other foods or meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Soft drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alcoholic drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Betting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

D. You as a Fan

- 13a. Which of the following have you seen or heard at our home league matches this season? (Tick as MANY boxes as you need)

Fighting / missile throwing	<input type="checkbox"/>
Abuse about sexuality ('gay' abuse)	<input type="checkbox"/>
Racist comments	<input type="checkbox"/>
Language/chanting which is offensive to you	<input type="checkbox"/>
Abuse about gender	<input type="checkbox"/>
None of these	<input type="checkbox"/>

- 13b. Thinking about Premier League home matches, please rank the 3 best elements about going to a game from the following list. (Please rank your top 3 elements by WRITING 1, 2 and 3 in a box, with 1 being the most important)

Seeing the team play live	<input type="checkbox"/>
Being close to the action	<input type="checkbox"/>
Meeting family / friends	<input type="checkbox"/>
Singing / chanting	<input type="checkbox"/>
Match action	<input type="checkbox"/>
Match crowds	<input type="checkbox"/>
Stadium facilities	<input type="checkbox"/>
The quality of the football	<input type="checkbox"/>

16. Now thinking about club merchandise, on average, how much are you likely to spend on each of the following items **over the season**? (Tick ONE box in each row)

	Would not buy	Up to £20	£21-£60	£61-£99	£100+
Club replica kit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club videos, DVD's and publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult club clothing (not kit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's products (not kit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other club products and merchandise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

G. Television and the Internet

17. Which of the following do you have at home? (Tick ONE box only)
Cable TV ☐ Satellite TV ☐ Freeview ☐ None ☐
18. Do you watch live Premier League matches on TV?
(Tick as MANY boxes as you need)
Yes – my club only ☐ Yes – other clubs ☐ No ☐
- IF YOU DO WATCH LIVE PREMIER LEAGUE MATCHES ON TV;
19. Which of the following is your preferred kick off time for live matches on TV? (Tick ONE box only)
Saturday 1pm ☐ Sunday 2pm ☐ Monday 8pm ☐
Saturday 5:15pm ☐ Sunday 4:05pm ☐
- 19a. What do you think about the total amount of live football which has been on TV this season? (Tick ONE box only)
Far too much ☐ Too much ☐ Too little ☐ Far too little ☐
20. Live matches are currently not screened on TV at 3pm on a Saturday due to concern that this could affect attendances at matches in lower leagues and participation at grass roots level.
This policy is designed to protect football at all levels. Do you agree with it? (Tick ONE box only)
Yes ☐ No ☐
- 21a. There are 2 ways of increasing the amount of times your Club appears on TV; either by them being selected more often as part of the 138 matches currently on TV, or by the Premier League showing more of every Club's games thereby increasing the overall number of matches broadcast.
Of the matches that are currently live on TV, would you like to see more of them involving your Club? (Tick ONE box only)
Yes ☐ No ☐
- 21b. Would you like to see the Premier League broadcast more of your Club's (and every Club's) matches on TV if this meant that more games were re-scheduled away from a Saturday 3pm kick off? (Tick ONE box only)
Yes ☐ No ☐
22. How many live matches on TV would you usually watch in a normal month? (Tick ONE box in each row)
- | | None | 1 or 2 | 3-6 | 7-10 | 11+ |
|-----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Premier League | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Football League | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Champions League | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| UEFA Cup | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other European League | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
23. Which of the following Premier League Pay-Per-View (PPV) packages have you purchased this season? (Tick as MANY boxes as you need)
PPV season ticket ☐ PPV single match ticket ☐ Neither of these ☐
24. Where do you watch live Premier League matches on TV?
(Tick as MANY boxes as you need)
At home ☐ Our ground (e.g. beam-back) ☐
At a friend's / relative's house ☐ I don't watch live matches on TV ☐
Pub / social club ☐
25. Do you have access to the Internet? (Tick as MANY boxes as you need)
At home ☐ Via mobile phone ☐ At a friend's / relative's house ☐
At work ☐ At school / college ☐ No Internet access ☐
26. How often do you use the Internet for any information about football? (Tick ONE box only)
More than once a day ☐ 2 to 3 times a week ☐ Once a month or less ☐
Once a day ☐ Once a week ☐ Never use it ☐
27. How often do you use your official club website for information about the club? (Tick ONE box only)
More than once a day ☐ Once a week ☐
Once a day ☐ Once a month or less ☐
2 to 3 times a week ☐ Never use it ☐
28. Which other sites do you usually visit for football information (i.e. at least once a month)? (Tick as MANY boxes as you need)
football365.com ☐ skysports.com ☐ A newspaper site ☐
rivals.net ☐ newsnow.co.uk ☐ None of these ☐
bbc.co.uk ☐ premierleague.com ☐
4thegame.com ☐ Other football sites ☐
29. Which sorts of football-related services or coverage are you likely to use the Internet for in the future? (Tick as MANY boxes as you need)
Keeping up with club news ☐ Watching highlights ☐
League tables / match statistics ☐ Buying club products ☐
Match tracker service ☐ To view archive footage ☐
Ticket information / purchase ☐ Games (e.g. Fantasy Football) ☐
Club match reports ☐ None of these ☐

H. Football and the Community

30. Football can play an important role in the local community. Please indicate how much you agree with each statement below.
(Tick ONE box in each row)
- | | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree | Don't know |
|--|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|--------------------------|
| Football players have an important role to play as role models in society | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Premier League Clubs have an important role to play in their local community | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
31. How likely would you or your family be to engage in any of the following activities if they were based or available through your Club?
(Tick ONE box in each row)
- | | Very likely | Fairly likely | Neither likely nor unlikely | Not very likely | Not at all likely | Don't know |
|--|--------------------------|--------------------------|-----------------------------|--------------------------|--------------------------|--------------------------|
| Adult education courses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| After school educational classes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Health information / advice | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Health check or screening | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A GP service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Travel vaccination | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Family reading groups at local libraries | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Football coaching courses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
32. Which of the following community projects supported by the F.A. Premier League and its Clubs are you aware of? (Tick as MANY boxes as you need)
Football Foundation ☐ Playing for Success ☐ Club Learning Centres ☐ None of these ☐
Premier League Reading Stars ☐ The Prince's Trust Football Initiative ☐ Kick it Out ☐
33. How interested are you in reading about the activities that your Club does in the community? (Tick ONE box only)
Very interested ☐ Fairly interested ☐ Not that interested ☐ Definitely not interested ☐ Don't know ☐

I. The F.A. Premier League

34. Below are statements that people have made about the F.A. Premier League. Please indicate how much you agree with each statement. (Tick ONE box in each row)

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Don't know
Going to matches in the Premier League is value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Premier League is the most exciting league in Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Premier League has the best football stadiums in Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

35. Do you hold any of the following products with the title sponsor 'Barclays'? (Tick as MANY boxes as you need)

Bank account <input type="checkbox"/>	Insurance <input type="checkbox"/>	Credit Card (Barclaycard) <input type="checkbox"/>	Other Barclays products <input type="checkbox"/>
Mortgage (including Woolwich) <input type="checkbox"/>	Savings (including ISAs) <input type="checkbox"/>	Business Banking <input type="checkbox"/>	None of these <input type="checkbox"/>

K. Questions Specific to the Club

L. Personal Details: Remember this information is confidential and can only be given to your club if you indicate below.

36. How old are you? (Tick ONE box only)

Under 16 years <input type="checkbox"/>	45 to 54 years <input type="checkbox"/>
16 to 24 years <input type="checkbox"/>	55 to 64 years <input type="checkbox"/>
25 to 34 years <input type="checkbox"/>	65 to 74 years <input type="checkbox"/>
35 to 44 years <input type="checkbox"/>	75 years or older <input type="checkbox"/>

37. Are you :

Male ☐ Female ☐

38. If you have school age children (16 years or below), please write in the box to show how many children in each age group and sex you have. (PLEASE WRITE IN NUMBERS e.g. Boy - 0 to 5 years)

Boy - 0 to 5 years <input type="text"/>	Girl - 0 to 5 years <input type="text"/>
Boy - 6 to 10 years <input type="text"/>	Girl - 6 to 10 years <input type="text"/>
Boy - 11 to 16 years <input type="text"/>	Girl - 11 to 16 years <input type="text"/>

39. Are you :

Single <input type="checkbox"/>	Divorced / separated <input type="checkbox"/>
Married / living with partner <input type="checkbox"/>	Widowed <input type="checkbox"/>

40. Which of the following best describes your occupation / work status? (Tick ONE box only)

Professional / Managerial <input type="checkbox"/>	Semi-skilled manual <input type="checkbox"/>
Skilled manual <input type="checkbox"/>	Student <input type="checkbox"/>
Clerical / office worker <input type="checkbox"/>	Unemployed <input type="checkbox"/>
Shop worker <input type="checkbox"/>	Retired <input type="checkbox"/>
Unskilled <input type="checkbox"/>	House person <input type="checkbox"/>

41. If you are in work, what is your approximate income each year? (Tick ONE box only)

Below £10,000 p.a. <input type="checkbox"/>	£30,000 - £49,999 p.a. <input type="checkbox"/>
£10,000 - £19,999 p.a. <input type="checkbox"/>	£50,000 - £99,999 p.a. <input type="checkbox"/>
£20,000 - £29,999 p.a. <input type="checkbox"/>	£100,000 + p.a. <input type="checkbox"/>

42. To which of the following 'ethnic' groups would you describe yourself as belonging? (Tick ONE box only)

Bangladeshi <input type="checkbox"/>	Indian <input type="checkbox"/>	Other Asian background <input type="checkbox"/>
Black - African <input type="checkbox"/>	Mixed background <input type="checkbox"/>	Other black background <input type="checkbox"/>
Black - Caribbean <input type="checkbox"/>	Pakistan <input type="checkbox"/>	Other <input type="checkbox"/>
Chinese <input type="checkbox"/>	White <input type="checkbox"/>	Rather not say <input type="checkbox"/>

Thank you for taking part in the 2005/06 F.A. Premier League National Fan Survey.

If you would like to be included in future research projects, please tick this box and sign ☐ Signed _____

If you are happy for your details to be given to your club (ONLY), please tick this box ☐ Email _____
They may send you information and special offers.