



Football - UK - April 2021

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This report looks at the following areas:

- The impact of COVID-19 on the professional football market.
- How fans have followed football during the COVID-19 restrictions.
- Opportunities created by post-pandemic demand for social leisure.
- Changes in fan behaviour following the COVID-19 crisis.

Football is twice as popular as any other spectator sport in the UK, with 42% of all online adults following it during the COVID-19 pandemic despite an initial three-month suspension of competition and matches being played behind closed doors ever since.

Empty stadiums and changes to broadcast agreements have cost Premier League and English Football League (EFL) clubs around £1.7bn already and ended a period of sustained market growth that saw combined revenues grow by 50% over the five seasons to 2018-19.

The two main threats to the market's full recovery are that the softening of the media rights market seen before the pandemic is amplified by its impact on broadcasting businesses and that younger fans in particular have less money to spend on watching football (in stadiums, pubs or via pay-TV subscriptions) if the COVID recession is prolonged.

However, anticipated post-pandemic desire to socialise with family and friends outside the home also creates an opportunity for football clubs to attract new spectators by positioning themselves as safe places for larger groups to meet, have fun and make new memories together.



“Interest in football has remained strong throughout a COVID-19 crisis that has cost clubs approaching £2bn in lost revenue, but the pace of the game’s recovery is likely to be slowed by a softening media rights market and any prolonged post-pandemic recession.”

– David Walmsley, Senior Leisure Analyst

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