

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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Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Products covered in this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on professional football**
Figure 1: Short-, medium- and long-term impact of COVID-19 on professional football, 6 April 2020
- **The market**
- **COVID crash ends golden era of growth**
Figure 2: Forecast of English professional football* club revenues, 2015/16-2025/26
- **Premier League sustains commercial appeal**
Figure 3: Premier League revenues, by segment, 2015/16-2019/20
- **Free access draws record crowds**
Figure 4: Television audiences for selected Premier League matches played during COVID-19 restrictions, 2020 and 2021
- **Companies and brands**
- **Top flight in a league of its own**
Figure 5: English professional football club revenues, by division, 2018-19
- **Shared screens save social experiences**
- **The consumer**
- **Stadiums well set for social leisure boom**
Figure 6: Higher priorities since the outbreak of the COVID-19 pandemic, 4-12 February 2021
- **Pandemic profile keeps football top of the table**
Figure 7: Sports followed, February 2021
- **Football writing still in the game**
Figure 8: Methods of following football, February 2021
- **Amazon achieves impressive early results**
Figure 9: Broadcast channels used to watch live football, February 2021
- **Strategic sharing needed to reach social media's silent majority**
Figure 10: Football follower typologies, February 2021
- **Fans looking forward to summer of sport**
Figure 11: Major sports event viewing intentions, February 2021
- **Mostly home games for EURO 2020**

What's included

Executive Summary

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Figure 12: EURO 2020 viewing intentions, February 2021

ISSUES AND INSIGHTS

- £2bn down – but football still sports market's COVID winner
- High visibility proves a lifesaver
- Summer of broadcast sport advertises autumn attendance
- Has the pandemic taken media interest into extra time?
- Reading and listening shoot past the post
- Social media a signpost, not just a destination

THE MARKET – KEY TAKEAWAYS

- Golden age of growth ends in COVID crash
- Cost of pandemic heads for £2bn
- Commercial appeal looks resilient
- Free access draws record TV crowds
- Women's game earns higher profile

MARKET SIZE AND FORECAST

- **COVID curtails golden era of growth**
Figure 13: Short-, medium- and long-term impact of COVID-19 on professional football, 6 April 2021
- **Broadcast boom starting to soften**
Figure 14: English professional football* club revenues, 2015/16-2019/20
- **COVID closures end five-year run of attendance growth**
Figure 15: Premier League and EFL attendances, by division, 2015/16-2019/20
- **A rapid rebound but slower growth to follow**
Figure 16: Forecast of English professional football* club revenues, 2015/16-2025/26
- **Market drivers and assumptions**
Figure 17: Key drivers affecting Mintel's market forecast (prepared on 6 April 2021), 2015-25
- **Learnings from the last recession**
Figure 18: English professional football* club revenues, 2007/08-2011/12
- **Forecast methodology**

MARKET SEGMENTATION

- Break in play cuts key revenue streams
- Broadcast income hit by deferments and rebates
- Matchday spending slashed as stadiums shut
- Commercial appeal stays strong

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Figure 19: Premier League revenues, by segment, 2015/16-2019/20

MARKET DRIVERS

- **Free screenings set new viewing records**
Figure 20: Television audiences for selected Premier League matches played during COVID-19 restrictions, 2020 and 2021
- **Investment in stadiums can drive long-term COVID comeback**
Figure 21: Capital investment by English professional football clubs, by division, 2014/15-2018/19
- **Football and technology: accelerating demand but slowing supply**
- **Women's game brings new fans, attitudes and opportunities**
Figure 22: Women's sports watched, July 2019

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Top-flight value overshadows lower leagues' growth**
- **Virtual tickets generate real revenue**
- **Shared screens save social experiences**
- **Strong Euro performance pushes up pounds**

MARKET SHARE

- **Lower league clubs at greatest COVID risk**
Figure 23: English professional football club revenues, by division, 2018-19
- **The best of the best are the richest of the rich**
Figure 24: Premier League clubs' average revenues, by participation in UEFA competition, 2018-19

LAUNCH ACTIVITY AND INNOVATION

- **Fans club together for virtual tickets**
- **You'll never watch alone**
- **Reality of 5G offers augmented experiences for fans**
- **Clubs get into the gaming game**

LEADING CLUBS

- **Top six gets more competitive**
Figure 25: Leading Premier League club revenues, by segment, 2018-19
- **Desperate times spark calls for radical measures**

THE CONSUMER – KEY TAKEAWAYS

- **Demand for social experiences plays to football's strengths**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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- **Pandemic profile maintains sports market dominance**
- **Television a lifeline while stadiums stay shut**
- **Core fans and customers navigate to Amazon**
- **Strategic sharing needed to reach social media's silent majority**
- **Financial pressures give EURO 2020 home advantage**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Close season could help open more cautious eyes**
Figure 26: Football fans' willingness to return to sports stadiums, August 2020
- **Stadiums at home to friends reunited**
Figure 27: Higher priorities since the outbreak of the COVID-19 pandemic, 4-12 February 2021

FOOTBALL FANS

- **Getting back on the pitch keeps football ahead of the game**
Figure 28: Sports followed, February 2021
- **Younger market needs careful management**
Figure 29: Football followers, by generation, February 2021

FOLLOWING FOOTBALL

- **COVID breaks the attendance habit**
Figure 30: Methods of following football, February 2021
- **Social listening pushes players' podcast opportunity**
Figure 31: Methods of following football, by social-media activity, February 2021

WATCHING FOOTBALL

- **Core fans flood over to Amazon**
Figure 32: Broadcast channels used to watch live football, February 2021
- **YouTube crashes broadcasters' highlights party**
Figure 33: Broadcast channels used to watch non-live football video/programming, February 2021
- **TV still the biggest and the best**
Figure 34: Devices used to watch broadcast coverage of football, February 2021

FOOTBALL AND SOCIAL MEDIA

- **Seen but not shared?**
Figure 35: Football follower typologies, February 2021
- **Instagram for players, Facebook for teams**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

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Figure 36: Social-media channels used to follow football, February 2021

WATCHING EURO 2020

- Fans ready to welcome back sport's biggest occasions**

Figure 37: Major sports event viewing intentions, February 2021

- Stay home, watch the EUROS, save money**

Figure 38: EURO 2020 viewing intentions, February 2021

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations**
- Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- Forecast methodology**

Figure 39: Forecast of English professional football* club revenues, 2020/21-2025/26

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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