

## Football - UK - November 2012

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"Football revenues will continue to be buoyed by the game's rising TV and commercial segments but, for perhaps the first time since the 1980s, direct consumer expenditure is under genuine pressure as a result of the straining wider economy.

In the face of supporter demands for cheaper tickets, FAPL clubs will point to high utilisation rates to justify current prices, but could also look to technology-led investment to deliver an improved stadium experience that can lift average revenue per seat without bumping up admission costs.

Beyond the stadium, new technologies and media platforms are creating new ways of following football, particularly around mobile devices. These propositions can deepen fans' engagement with the game through always-on connections and change the way in which consumers watch live football in future."

– David Walmsley, Senior Leisure Analyst

### In this report we answer the key questions:

- Is football now vulnerable to the economy?
- Are match tickets too expensive?
- How can the stadium experience be improved?
- What is the role of mobile in football's marketing mix?
- Can tablets give the game a new viewing platform?

After 20 years of the FA Premier League (FAPL), English football is now well established as one of the UK's leading leisure sectors, with total annual attendances consistently around 30 million and televised matches attracting peak audiences of 20 million on free-to-air channels and 4 million on pay TV.

A record-breaking broadcast rights sale is set to deliver a significant rise in FAPL clubs' revenues from 2013, but consumer expenditure on football has come under genuine pressure as real incomes have been squeezed by the economic climate. As a result, supporters are cutting back on football purchases and 75% now consider match tickets to be too expensive. The flipside, however, is that the search for trading-down and alternative methods of following the game is creating opportunities for new technologies and media platforms to emerge as key channels for reaching fans.

This report assesses current trends in the ways in which consumers follow English football (both in person and via media), examines their purchasing patterns around the game and identifies ways in which clubs, sponsors and partner brands can respond to the main themes emerging.

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