

Sport Management & the Business of Football

Strategic Sport Marketing & the Football Industry

**INCREASING ATTENDANCES
AT FOOTBALL CLUBS**

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FOOTBALL IN TROUBLE

Professional football is in trouble. The 2009/2010 season has seen the first Premier League club go into administration with the debacle at Portsmouth FC, and the new owners of West Ham United FC claim that only their takeover saved the Hammers from a similar fate¹. The worldwide economic crisis has not looked kindly upon clubs who have over-committed themselves, and there is a realisation amongst stakeholders that football clubs need to be run as solvent trading companies.

It is acknowledged that a well-supported football club is not as disposable as a company in any other industry, or else Portsmouth FC would have been wound-up rather than allowed to limp on in administration. However, clubs can only retain that privileged and protected position in society with the support of their passionate and loyal fans. It is certainly true in the upper echelons of the game that the distance between clubs and fans is ever-increasing. Many years ago players would not earn significantly more than the working class supporter. These days, Premier League players can earn more in a week than the average person earns in a year², making it difficult for fans to identify with their idols in the same way. There is a growing chasm that needs to be addressed to ensure that fans continue to flow through the turnstiles, bringing in an essential source of funding and, no less importantly, the heart and soul of any football club.

Football Fans Survey

The latest Virgin Money Football Fans Survey is worrying reading for clubs in the Premier League. Published in March 2010, the Survey shows that an average of one in four season

¹ <http://www.mirrorfootball.co.uk/news/David-Sullivan-West-Ham-would-have-gone-into-administration-like-Portsmouth-if-it-wasn-t-for-me-and-David-Gold-Exclusive-article336957.html>

² <http://news.bbc.co.uk/1/hi/8151355.stm> shows that the median annual UK salary was £20,801, as against the average weekly Premier League salary of £21,000 at <http://www.guardian.co.uk/football/2009/apr/23/football-fans-salary-cap> both for the financial year ending April 2009.

ticket holders is considering not renewing their season ticket for the 2010/2011 season³. The figure is as high as 59% for disgruntled Manchester United fans, 15% suggesting that they would stop going altogether, and 44% intending to buy tickets for individual matches.

It is the Manchester United statistic that perhaps provides the clearest example of supporter disengagement. In recessionary times, Manchester United was the only club to increase its season ticket price for the 2009/2010 season, with the owners failing to show sufficient sensitivity to the financial circumstances of the club's fans. Whilst the increase can partly be attributed to the well publicised financial difficulties of the club itself, there is an element of arrogance in the move with the management no doubt confident that high demand would ensure all tickets were sold. That confidence was justified, but the Survey statistic shows the short-termism of the approach.

Percentage of Premier League season ticket holders who are thinking of not renewing for 2010/2011 according to Virgin Money's Football Fans Survey⁴:	
Manchester United 59%	Wigan 21%
Wolves 54%	Tottenham 19%
Burnley 31%	Manchester City 18%
Fulham 29%	Birmingham 17%
Everton 28%	Chelsea 17%
Blackburn 28%	Hull 17%
Portsmouth 28%	Arsenal 14%
West Ham 27%	Bolton 13%
Aston Villa 24%	Liverpool 9%
Sunderland 23%	Stoke City 9%

³ <http://uk.virginmoney.com/virgin/news-centre/press-releases/2010/one-in-four-season-tickets-could-be-cancelled.jsp>

⁴ <http://uk.virginmoney.com/virgin/news-centre/press-releases/2010/one-in-four-season-tickets-could-be-cancelled.jsp>

Learning from The Football League

Season ticket sales are the bedrock of a club's match day income, but going forward clubs in the Premier League may find themselves under increased pressure to maximise ticket sales on a match-by-match basis if the changes threatened by respondents to the Survey are borne out. This is a challenge that clubs in the Football League have faced for a considerable period of time – with average attendances as low as 69% of stadium capacity in the Championship, 53% in League 1 and 39% in League 2, there is little pressure on fans to commit to a season ticket when they know they can turn up on the day to buy a ticket for any match they want to see.

Attendances as percentage of stadium capacity for 2009/2010 season ⁵			
League	Highest percentage	Lowest percentage	Average
Premier League	99% (Arsenal)	71% (Wigan)	91%
Championship	87% (Derby)	53% (Coventry)	69%
League 1	95% (Norwich – next is 73%)	31% (Carlisle)	53%
League 2	61% (Burton)	8% (Darlington – next is 24%)	39%

However, as described below, the Football League clubs have been pro-active and innovative in their efforts to attract and retain fans. Overall Football League attendances are at a 50 year high⁶. The marketing departments of Premier League clubs should look to their Football League colleagues for models and inspiration for increasing attendances, as they may no longer be able to rely on their presence in the Premier League as a guarantee of attracting large crowds.

⁵ Information compiled from attendance statistics for 2009/2010 season to 13 March 2010
<http://itv.stats.football365.com/dom/ENG/D2/attend.html>

⁶ <http://www.thesun.co.uk/sol/homepage/fun/competitions/promotions/2825850/Family-football-tickets-from-950.html>

MARKETING IN FOOTBALL

The Match Ticket

In the context of match attendances, the 'product' that football clubs are looking to promote is the opportunity to watch a game of football, enjoying the facilities and amenities available at the stadium on the day of the game. Each club has a fixed quantity of the product for sale, the quantity being determined by the stadium capacity, less any sales of season tickets.

The match ticket is the product in its most basic form – it permits access to the stadium for a particular game, and requires you to sit in a designated seat. The ticket gives no guarantee as to the quality of the football that you will see, nor does it guarantee an electric atmosphere or a seat amongst pleasant company. If you are lucky, you will see a good game of football and a win for your team, but you may see an awful performance and a disastrous result. The cost will be the same regardless.

Ticket prices have increased over the years but the product itself has remained unchanged. In a time of enlightened consumerism, it is unsurprising that clubs are working on marketing strategies to make the product more appealing to fans. In doing so, they will no doubt be considering the appropriate marketing mix – creating the right product, to be sold at a suitable price, in the correct place, using a fitting promotion. However, in order to determine the optimum marketing mix, thought must also be given to the target market.

Market Segmentation

Football as a spectacle is fortunate in that it is a class of entertainment that can be enjoyed by anyone. In theory, it is accessible to adults of any age and children from as young as four or five years old, irrespective of gender, religion, race, education or class. The demographic

segmentation of those that *could* be interested in the product is consequently very broad. Similarly, the potential football supporter would not be restricted by any particular psychographic segmentation.

Geographically, clubs will be limited by their catchment area. Some fans will travel far and wide to watch their team play, but a realistic segment would be those living within 90 minutes of the stadium. This is limiting to some degree, but when you consider that a club such as Newcastle United has 2.5million people living within 30 minutes of St James' Park (which has a capacity of 52,000)⁷, there are enough people within the immediate vicinity of the stadium to fill the ground 50 times over.

If segmenting the geographically and demographically viable public by behaviour, you will find that there are people who (A) have no interest in football so do not attend, (B) have an interest in football but do not attend, (C) attend matches occasionally, (D) attend matches regularly, and (E) are season ticket holders⁸.

Some people within the first category could no doubt be persuaded to change their minds, but the reward to resources ratio of targeting that group would be unlikely to justify the efforts. In order to increase attendances at matches, clubs should focus on the middle three categories as those are the categories with most room for improvement. Clubs such as Arsenal who enjoy near capacity crowds would have no product available to sell if they were to successfully adopt such a broad strategy, so are likely to focus their marketing approach elsewhere (such as on top-end hospitality packages, global reach, and ensuring long term interest). However, the attendance chart above shows that, particularly outside of the Premier League, few clubs

⁷ Meeting with Barry Webber, Commercial Director of Newcastle United, on 3 March 2010.

⁸ These categories broadly mirror the categories used by the Football League Supporters Survey 2008.

have the luxury of a full stadium, so are looking to sell thousands rather than hundreds of match tickets. For those clubs, a broad approach is required.

THE MARKETING MIX

Assuming that the target market are individuals within the geographic segment of a maximum 90 minute journey to the stadium, and behavioural categories B, C or D, the optimum marketing mix can now be considered.

Product

For those individuals who are with behavioural categories B and C, their reluctance to attend matches may be down to more than simple pricing. For those individuals, the product may be wrong.

If you take category B and C women for example, whilst they may have an interest in football, and whilst they may be able to afford the ticket, the overall experience of attending a football match is not sufficiently appealing. Category B and C children, as another example, do not have to worry about pricing as their parents will pay, but the trek to the ground on a cold, wet evening only to watch a boring match and to stand around in long queues can be a big deterrent from going again. Clubs could improve the attendances of these categories by offering enhanced products which make the match day experience more than the basic product of the football match.

'Product' in practice – Nottingham Forest FC

Nottingham Forest came up with a pioneering initiative of a 'mixed family area' for their game against Doncaster Rovers in November 2009⁹. They brought together fans of both teams in a single family enclosure to allow families to enjoy the day's football in a friendly atmosphere. Importantly, the experience was more than just the football match. The lounges

⁹ <http://www.nottinghamforest.co.uk/page/ClubGallery/0,,10308~1894673,00.html>

in the stand were used for children's activities such as face painting and computer games, and players from both teams visited the lounges pre-match to sign autographs and pose for photos with the young supporters. The half-time entertainment was also aimed at children, all of whom went home with a goody bag and a big foam hand, undoubtedly having had a thoroughly enjoyable day. The event was a success in that the tickets were sold out in advance of the day, and the club will hope that the positive impact on those who attended will have encouraged them to come back again soon.

Another way of looking at the 'product' is by considering it in terms of ticket bundles. Category C and D fans attend matches, but not as season-ticket holders. The overwhelming reason that these fans do not buy season-tickets is because they cannot get to every game. Many of the reasons for which people become season ticket holders are things that can equally apply to those fans who are unable to attend every week – the wish to show loyalty to a club, the benefit of cheaper tickets when bought in bulk, the guarantee of a ticket, and the desire to sit with the same people. Therefore, clubs should look to fill the void between individual tickets and season tickets by offering smaller bundles of tickets.

'Product' in practice – Derby County FC

Derby County FC's American owners have done precisely that with their '6-Pack' ticket offering¹⁰. The bundle allows you to choose from a selection of matches, and is aimed at getting greater commitment from the occasional supporter, and enticing lapsed fans to return to Pride Park¹¹. The club's 'Fans First' approach towards supporter re-engagement, which includes a pro-active telesales team and improved communication between the board and fans, has been a real success. Despite a relatively poor season on the pitch, the club has the

¹⁰ <http://www.dcfc.co.uk/page/6Pack/>

¹¹ Meeting with Tim Hinchey III, Commercial Director of Derby County FC, 2 March 2010

highest average attendance by percentage of capacity in the Championship (at 87%), and an average attendance figure (29,000) that is higher than half of the teams in the Premier League¹².

Price

The Football League Supporters Survey 2008 shows that price is a major reason that many people in category D do not buy season tickets. Approximately a quarter of respondents cited season tickets being overpriced as their reason for not committing.

'Price' in practice – Bradford City FC

Bradford City FC demonstrated what a difference pricing could make to attendances when they announced their 'Cheapest Season Ticket' initiative. They dropped season ticket prices for adults to as low as £138, and offered free season tickets to under-11s when accompanied by an adult. This saw season ticket sales jump from approximately 5,000 to over 12,000¹³. Statistics for the current season show that they are only at 45% capacity, but with an average attendance of over 11,400 they are drawing in nearly twice as many fans as the next best attended club¹⁴. Whilst the figures are impressive, they fall well short of the 20,000 average gate that Bradford City had hoped for as a follow up to their 'Cheapest Season Ticket' initiative, and show that price is only one of many relevant factors. Furthermore, the club has to attract 10,000 season ticket holders per season to make this price sustainable.

Promotion

Football tickets have long been under-promoted when compared with the advertising campaigns that other entertainment events conduct. The assumption seems to have been that

¹² <http://itv.stats.football365.com/dom/ENG/D1/attend.html>

¹³ Football League Supporters Survey 2008

¹⁴ <http://itv.stats.football365.com/dom/ENG/D3/attend.html>

fans know where to go to get tickets, whether in person from the club's ticket office, online or by telephone. However, that does not reach out to the category B and C market segments whose interest may be peaked when the product is advertised to them.

Promotion can be very easy for football clubs, particularly with the increased use of customer relationship marketing systems which can gather and analyse data about a club's fans. By storing email addresses and mobile phone numbers of fans, clubs can send marketing material directly to fans at low cost and on a regular basis. In 2008, Southend United had a database of 65,000 names, against an average attendance of 9,000¹⁵. The systems can allow clubs to effectively monitor the attendance habits of supporters, and take active steps to contact and bring back absent fans (as in the case of Derby County). Clubs at all levels of the game appreciate the potential value of such a tool, and even the smaller clubs in League 2 are investing in the software¹⁶. Of course, the limitation of a CRM system is that it requires an initial step by the individual to contribute their personal details to the database.

'Promotion' in practice – The Sun & The Football League

The Sun newspaper teamed up with the Football League in January 2010 to offer reduced price family tickets to matches in the Championship, League 1 and League 2¹⁷. With an average daily readership of nearly 8million¹⁸, this was a novel way for the clubs to highlight their product nationally, and potentially attract first time fans. Because the product is sold as a two adult/two children ticket, it may encourage women to attend (as statistically women are more likely to attend as a family group¹⁹) and will give parents an opportunity to take children to a game that could otherwise be prohibitively expensive. Queens Park Rangers are

¹⁵ Football League Supporters Survey 2008

¹⁶ Meeting with Martin Edmundson, Marketing Manager of Accrington Stanley FC, 3 March 2010

¹⁷ <http://www.thesun.co.uk/sol/homepage/fun/competitions/promotions/2825850/Family-football-tickets-from-950.html>

¹⁸ <http://www.guardian.co.uk/media/2009/feb/19/nrs-figures-newspapers-readership>

¹⁹ Football League Supporters Survey 2008

part of the scheme, with The Sun's family ticket costing only £19.50 compared to the regular price of £80. As stated by the Football League's David Malkinson in support of the public relations effort, the promotion has "*created a brilliant offer that can't be beaten on scale or price*"²⁰.

'Promotion' in practice – Southend United FC

Southend United came up with an original promotion to encourage fans to buy season tickets. Launched on the same day as the World Cup draw in December 2009, the club announced that supporters who purchased their season ticket early for 2010/2011 will get their money back if England win the World Cup in South Africa. The campaign was run on a limited budget, but maximised exposure through exploiting the local press, and used digital media such as text messaging and emails to alert fans to the offer. It is assumed that the promotion is somehow insured to cover for the eventuality of England winning and the club having to provide a refund to its fans.

Place

'Place' is an increasingly easy element of the marketing mix for clubs to get right. Accessibility to tickets through all-hours phone lines and online booking systems is important for clubs throughout the divisions. The League 2 fan is generally going to be in no better position to attend the stadium in person to queue and collect tickets than any fan at a higher level, so ensuring modern systems are in place should be the basic requirement for all professional clubs.

²⁰ <http://www.nottinghamforest.co.uk/page/ClubNews/0,,10308~1951795,00.html>

THE PRESENT AND THE FUTURE

Top of the League

Looking back to the table showing attendances as a percentage of capacity, the notable success outside of the Premier League is Norwich City FC. Despite relegation to League 1, the club still attracts an average crowd of nearly 25,000 in a stadium that holds 26,000. The Chief Executive, David McNally, rightly commented that, *“These figures are nothing short of astonishing when you consider we are currently in the third tier of English football for the first time in 50 years.”*²¹ Impressively, by early March 2010 the club has already sold over 18,500 season tickets for the 2010/2011 season, and there is a waiting list for those wanting to purchase new season tickets.

The fact that the Canaries are sitting top of the league undoubtedly assists in keeping up attendances, but given the club’s attendances were almost identical last season when the club was relegated, impressive home form only tells part of the story. With season ticket prices at around £450 for adults, cheap ticketing cannot be the primary factor. Judging by the Football League Supporters Survey ‘Best Practice’ guide, it is the match day experience and the value for money that makes Norwich City such a well-supported club. Norwich City came top in the Survey (whilst a Championship club) for match day atmosphere, fan safety, stewarding, stadium cleanliness, price of food and drink, standard of food and drink, and attitude of kiosk staff²². The Club has correctly acknowledged the importance of ancillary factors to the match ticket product, and the success should be noted by the Club’s rivals.

²¹ <http://www.canaries.co.uk/page/NewsDetails/0,,10355~1989960,00.html>

²² Football League Supporters Survey 2008

Fans of the Future

For those clubs who cannot sell their tickets to near capacity, the focus must be on ensuring that the seat does not go to waste. If the club fails to sell a ticket then the ticket value is lost, the secondary spend is lost, and the stadium is that little bit emptier, affecting the match atmosphere. Offering the unused seats up for school and community use would seem to be the best way to get some value from an otherwise wasted asset. The business rationale behind free access for children is that they will inevitably have to be accompanied by a paying adult, the club will benefit from secondary spend on programmes, food, drinks and club merchandise, and those children will hopefully become life-long fans.

The Football League has a long term strategy to attract young people to matches, an initiative it has called 'Fans of the Future'²³. Clubs who show a genuine commitment to attracting and retaining family groups to their matches can be eligible for the Football League's 'Family Excellence Award'. Most people become supporters of a particular team from a young age, whether influenced by family or friends, and once a team has been 'chosen' it is unlikely to change. That fan loyalty is key to marketing in football, and something that the Football League is keen to take advantage of.

Queens Park Rangers FC won a Family Excellence Award for its performance in the 2008/09 season, and has continued to target schools and community projects over the past year²⁴. Its 'QPR in the Community Trust' programme reaches out to local children to offer interaction with the club through school coaching session and holiday soccer schools, and the club also allows all under-8s to attend home matches for free when accompanied by an adult.

²³ <http://www.football-league.co.uk/page/FamilyCharter/0,,10794,00.html>

²⁴ Meeting with Joe Kyle, Commercial Director of Queens Park Rangers FC, 3 March 2010

CONCLUSION

The search for ways to increase match attendances goes on as clubs continue to look at new initiatives to pull fans through the turnstiles. Numerous strategies for increasing attendances on a large scale have been implemented with varying degrees of success, and it is difficult to come up with new initiatives. Clubs have already introduced so many ideas, including holiday vouchers for season ticket holders²⁵, match day crèches²⁶, and ‘pay-what-you-like’ schemes²⁷.

The Football League clubs should be pleased with their efforts, as attendances remain respectably, and in some cases impressively, high given the distraction of televised matches and the glamour of the Premier League. However, this should not stop the marketing managers or marketing departments (as they are at some clubs) from continued development. Football is not the only activity that people can enjoy at weekends, and increasing ticket prices have made it less attractive to some supporters. It is therefore essential that clubs continue to engage with young fans, and attract new fans, with the knowledge that female and ethnic market segments are under-represented.

Clubs must work together to share stories of their successes with fellow league members in an effort to maximise attendances at all levels. The unique nature of the football supporter means that clubs are rarely in competition when it comes to attracting fans. A supporter will stay loyal to one team, so clubs do not risk losing fans to local rivals merely by exchanging ideas. Increasing attendances across the board can only be good for the game.

Many of the schemes for improving attendances have shown innovation and ingenuity in a sport where 'tradition' has arguably restricted progress. With modern technology and

²⁵ Northampton Town offer - <http://www.ntfc.co.uk/page/SeasonTickets/0,,10425~1912316,00.html>

²⁶ For example at Leeds United - www.leedsunited.com/staticFiles/ef/44/0,,10273~148719,00.pdf

²⁷ Mansfield Town - http://news.bbc.co.uk/sport1/hi/football/teams/m/mansfield_town/8502204.stm

advanced CRM systems there is a burgeoning opportunity for marketing departments of clubs to create focussed marketing strategies to reach out and re-engage with all categories of supporter.

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