<table>
<thead>
<tr>
<th>CONTENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOREWORD</strong></td>
</tr>
<tr>
<td>Pages 6 - 7</td>
</tr>
<tr>
<td><strong>EXECUTIVE SUMMARY</strong></td>
</tr>
<tr>
<td>Pages 8 - 11</td>
</tr>
<tr>
<td><strong>SECTION 1</strong></td>
</tr>
<tr>
<td><strong>RELATIONSHIP BETWEEN CLUBS &amp; THEIR SUPPORTERS</strong></td>
</tr>
<tr>
<td>Pages 12 - 31</td>
</tr>
<tr>
<td><strong>SECTION 2</strong></td>
</tr>
<tr>
<td><strong>MATCH ATTENDANCE</strong></td>
</tr>
<tr>
<td>Pages 32 - 51</td>
</tr>
<tr>
<td><strong>SECTION 3</strong></td>
</tr>
<tr>
<td><strong>MATCHDAY EXPERIENCE</strong></td>
</tr>
<tr>
<td>Pages 52 - 75</td>
</tr>
<tr>
<td><strong>SECTION 4</strong></td>
</tr>
<tr>
<td><strong>CONTENT &amp; COMMUNICATION</strong></td>
</tr>
<tr>
<td>Pages 76 - 93</td>
</tr>
<tr>
<td><strong>SECTION 5</strong></td>
</tr>
<tr>
<td><strong>BROADCASTING</strong></td>
</tr>
<tr>
<td>Pages 94 - 115</td>
</tr>
<tr>
<td><strong>SECTION 6</strong></td>
</tr>
<tr>
<td><strong>EFL COMPETITIONS</strong></td>
</tr>
<tr>
<td>Pages 116 - 129</td>
</tr>
<tr>
<td><strong>SECTION 7</strong></td>
</tr>
<tr>
<td><strong>THE EFL, POLICIES &amp; PERCEPTIONS</strong></td>
</tr>
<tr>
<td>Pages 130 - 145</td>
</tr>
</tbody>
</table>
WELCOME TO THE EFL SUPPORTERS SURVEY 2022.

The EFL is committed to regular and meaningful engagement with supporters, and our latest comprehensive survey follows on from the last one we successfully conducted in 2019.

Of course, a number of unexpected challenges and changes have shaped the world in last two years and Clubs, supporters and local communities have shown remarkable resilience in the wake of the Covid pandemic and its impact. I’m delighted that we were able to return to football as we know it at the start of the 2021/22 season.

The response from supporters to engage with this survey has been fantastic and over 32,000 fans took the time to give us their views. I would like to thank everyone who provided their input, which will prove invaluable to Clubs and the EFL as we look to capture the thoughts and feelings of supporters across a broad range of subjects.

Importantly our previous survey work has provided an ideal opportunity to benchmark opinion across a range of supporter experiences, to enable us to identify trends and key feedback for the benefit of our Clubs, and to inform the EFL’s future work across a number of important areas.

This year we asked a range of questions that reflect the football landscape in 2022, focusing on the relationships between fans and their Clubs and the role football plays in the lives of supporters up and down the country. We also sought views on attendance, particularly as we continue to recover from the Covid restrictions. Then there are other aspects of the match experience, such as travelling to games, attitudes to fan behaviour, stadium safety, impact on communities and important work around equality and inclusion. One area that continues to grow and become an influential part of the fan experience is across broadcasting and media, with supporters asked to tell us how they like to consume their football, whether they stream matches and just how they like to keep up to date with the latest news related to their Club.

In sharing their views across such a broad range of football-related topics, supporters have given us the insight that will help us shape future policy and ensure that the league and its Clubs continue to enhance the competition and the match experience, to meet the needs of fans.

Thank you again to all those who took the time to take part.

Trevor Birch
Chief Executive Officer
EFL
OVERVIEW

Supporters from all 72 EFL Clubs gave their thoughts on over 100 questions in the 2022 EFL Supporters Survey, covering a range of topics, such as the Club and fan relationship, matchday experience, Club communications, broadcasting and EFL policies.

Over 32,000 supporters of EFL Clubs responded, an impressive figure and 4,000 more than responded to the EFL’s previous survey in 2019.

The responses will be used to assist Clubs in their decision making, and provide the EFL with insight into perceptions of supporters across its three divisions, on a large range of matters impacting on the modern game.

DEMOGRAPHICS OF FANS WHO COMPLETED THE SURVEY

DIVISIONS

- **46%**
- **36%**
- **15%**

GENDER SPLIT OF FANS

- Male: 83%
- Female: 16%
- 1% prefer not to say

AGE PROFILE OF FANS

- Under 35: 19%
- Over 35: 81%

SEASON TICKET STATUS

- Season ticket holder: 63%
- Never held a season ticket: 19%
- Lapsed season ticket holder: 18%
EXECUTIVE SUMMARY

SUMMARY OF RESULTS

RELATIONSHIP BETWEEN CLUBS AND THEIR SUPPORTERS

The majority of fans who completed the survey have deep-rooted relationships with their Club, with 62% having supported their Club for 30 years or more.

89% of supporters believe that their Club is important to the social fabric of the town or city it is based in, with 58% aware of their Club’s activities in the community.

Supporters understand the importance of passing on their passion for their Club to the next generation of fans, with 74% viewing this as more important, or as important, as winning matches.

Importantly, a greater number of supporters have stated that they feel more valued by their Clubs than when surveyed in 2019.

MATCH ATTENDANCE

93% of fans who completed the survey have attended at least one game during the 2021/22 season, and survey respondents attend 14 to 15 home games and four to five away games away games on average per season.

Covid has had no impact on the number of home games attended by 62% of supporters, and 8% have attended more matches than usual since the pandemic.

Match attendance is a social activity for most fans, with 90% attending with friends or family.

The main reason that fans purchase a season ticket is to see their team live, followed by the ability to guarantee a seat.

Life commitments, distance to stadia and cost are the biggest barriers to attending games and purchasing season tickets for fans.

MATCHDAY EXPERIENCE

Atmosphere and safety are the two most important factors for supporters on matchday, with 65% of fans satisfied with the atmosphere at their Club and 82% happy with safety.

The majority of fans strongly agreed that their Club provides an inclusive and enjoyable matchday experience for all supporters, regardless of background, religion, sexual orientation, ethnicity or disability.

Overall, matchday satisfaction is 7.9 / 10, which is a slight improvement since the 2019 survey, and the number of fans that have experienced discriminatory language at games has halved.

CONTENT AND COMMUNICATION

62% of fans access digital content on a matchday with social media most commonly used to view score updates and team news, however supporter opinion is split on how easy or difficult it is to engage with digital content when at their Club’s stadium.

60% of supporters head to Club channels as the main source of information about their Club, and are most likely to be seeking ticket news, and fixture and results information.

BROADCASTING AND STREAMING

Fan opinion is split on whether the multiple subscriptions now available to supporters is a positive, although fans under 35 are significantly more positive than over 35s.

65% of supporters have used the Red Button service on Sky Sports, and 81% say that this streaming option wouldn’t impact their match attendance.

The majority of supporters were positive about the EFL’s online streaming service, iFollow.

51% of fans are social streamers who watch iFollow or their Club’s streaming service with one or more viewing companions.

EFL COMPETITIONS

87% of fans agree that EFL matches, whether watched in-person, or from home, are exciting.

Compared to the EFL Supporters Survey 2019, an increasing number of supporters are keen to attend games across EFL Cup competitions. Over 50% of supporters attempt to attend their Club’s Carabao Cup fixtures, and over 30% attempt to attend Papa Johns Trophy fixtures.

63% of season ticket holders attempt to attend all their Club’s Carabao Cup fixtures. Fans suggest the main barriers to attending are difficulties getting to midweek matches, and a view that Clubs don’t always prioritise games in the Carabao Cup.

The opportunity to attend a final at Wembley is considered a key benefit of the Papa Johns Trophy by 58% of supporters.

THE EFL, POLICIES AND PERCEPTIONS

Nearly all fans perceive the role of the EFL as being to uphold regulations effectively, to ensure competitions remain engaging and accessible, and to successfully administer, manage and develop EFL competitions.

92% of fans said that it is important that their Club develops young players, with 75% believing that their Club is currently doing a good job of this.

Fans believe that the opportunity to stand at matches, environmental sustainability and ensuring accessibility for all supporters are important focal points for the EFL and EFL Clubs.

79% fans would welcome the introduction of an Independent Regulator into English football.
RELATIONSHIP BETWEEN CLUBS & THEIR SUPPORTERS

OVERVIEW

EFL Clubs continue to play a huge role in supporters’ lives, and here, we’ll explore the main reasons for this.

We’ll also look into the generational and social aspects of their Club relationships, and how this links to family and in particular, community.

say that their Club plays an important role in its community
WHAT THE FANS HAVE TOLD US

This year, performance and action on the pitch are an important part of why fans love football, but for many supporters, their relationships with EFL Clubs are built on more than this. Community is a strong common thread throughout – in short, football brings everyone together.

LENGTH OF CLUB SUPPORT

For how long have you been a supporter of your Club? n=38,182

- 15% Less than 10 years
- 28% 10-20 years
- 19% 21-30 years
- 15% 31-40 years
- 15% 41-50 years
- 15% Over 50 years

It’s clear that EFL Club support is a lifetime commitment for many supporters. Incredibly, 62% of the fans that took part in the survey have supported their Club for over 30 years, and for a staggering 28%, this has extended to half a century or more. Passion for EFL Clubs runs deep.

LIFETIME SUPPORTERS

32% of men have supported their team for over 50 years (vs women - only 15%)
FOOTBALL IN THE LIVES OF SUPPORTERS

ATTITUDES TOWARDS THE ROLE OF FOOTBALL
To what extent do you agree with each of the following statements on a scale of 1 to 5 where 1 = strongly disagree and 5 = strongly agree?

Matchday is still a core fixture of fandom for many supporters, with 89% agreeing that nothing beats experiencing the energy and exhilaration of seeing matches live from the stadium.

As you might expect, football also has a huge social impact on people’s lives beyond the game itself, underlining the importance of Club community work. 85% of supporters can see the important role that Clubs play in fostering a community and being actively involved in it, and 75% of fans agree that football has a central role in their family life. It’s more than just a game for so many people right across the UK.

77% of under 35s say football allows them to feel part of their community

IMPORTANCE OF FOOTBALL:

- Nothing can beat the live football matchday experience: 89%
- My Club plays an important role in its community: 85%
- My Club’s results mean more to me than the performance of my national team: 79%
- Football is an important part of my family life: 75%
- Going to watch football is a big part in my usual weekly routine: 67%
- Football allows me to feel part of my community: 65%

85% of female fans say football is an important part of their family life
EFL CLUBS IN THE COMMUNITY

IMPORTANCE OF EFL CLUBS IN THE COMMUNITY

How important do you believe your Club is to the social fabric of the town or city in which it is based?

To what extent do you agree or disagree with the following statements, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

The huge majority of fans view EFL Clubs as having an integral role within their community. As we can see, 89% of fans said their Club is important to the social fabric of their town or city, and 85% view EFL Clubs as a focal point for their community. Football goes well beyond the game and truly does bring people together.

For most fans, this means that a sense of community is built around their team during and outside of matchdays. This really underlines the responsibility for Clubs to proactively engage their communities with initiatives that allow them to thrive.

IMPORTANCE OF THE CLUB TO TOWN OR CITY:

63% 26% 9%
5 – very important 4 3 - neutral 2 1 – not important at all

FEELING A SENSE OF BELONGING TO MY TOWN/CITY’S FOOTBALL CLUB:

39% AMONGST UNDER 35s 30% AMONGST OVER 35s
89% believe their Club is important to the social fabric of the town or city it is based in

AGREEMENT WITH STATEMENTS ABOUT CLUB

It is important that my Club is a focal point for its local community

54% 31% 13% 1% 85%
My Club welcomes all away fans

39% 39% 18% 3% 78%
My Club’s matchday crowd is representative of the local community

33% 37% 22% 6% 70%
My Club provides an inclusive, accessible and enjoyable matchday experience for all supporters

30% 40% 23% 5% 70%

NET AGREE

To what extent do you agree or disagree with the following statements, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree? n=35,328
COMMUNITY ACTIVITIES

How aware are you of the community activities carried out by your Club?

The EFL and its Clubs are acutely aware of the importance of the role football plays in the communities of the 72 towns and cities their clubs reside in. Having a positive impact on those closest to supporter networks and those closest to stadiums, has never been more important than throughout the global pandemic.

What’s great is that 58% of fans are aware of their Club’s community activities, which was even higher for female fans. Topping the ranking of most important Club activities are mental health related initiatives, with two in three fans viewing them as very important.

65% of female supporters are aware of their Club’s community activities (vs 58% of male supporters)

AWARENESS OF THEIR CLUB’S COMMUNITY ACTIVITIES:

<table>
<thead>
<tr>
<th>5 – very aware</th>
<th>4</th>
<th>3 – neither aware nor unaware</th>
<th>2</th>
<th>1 – not aware at all</th>
</tr>
</thead>
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<tr>
<td>27%</td>
<td></td>
<td>31%</td>
<td></td>
<td>26%</td>
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TOP 3 MOST IMPORTANT COMMUNITY ACTIVITIES:

- MENTAL HEALTH INITIATIVES: 66%
- HEALTHY LIFESTYLES: 61%
- EDUCATION: 57%

COMMUNITY WORK DELIVERED BY FOOTBALL CLUBS IS WITHOUT A DOUBT ONE OF THE KEY MECHANISMS IN HELPING TO ADDRESS IMPORTANT SOCIETAL ISSUES WITH THE AIM OF BUILDING STRONGER, HEALTHIER, ACTIVE, MORE COHESIVE COMMUNITIES.

Rick Parry,
EFL Chair
PORT VALE

Port Vale’s ongoing off-the-pitch activity continues to ensure they remain an important focal point for the communities they serve. In recent seasons, this work has had a lasting and profound impact on all those connected with the Club, and earned them the accolade of EFL Community Club of the Year in 2020/21.

Their ongoing efforts to attract new supporters, and welcome existing fans back to Vale Park, demonstrates the Club’s awareness of the importance of being a source of hope, support and passion.

Port Vale’s Chair, Carol Shanahan, explains how they are building on this work to look to improve the fan experience for supporters young and old, and to continue to strengthen the bond between the Club and its local community.

Port Vale has a burgeoning reputation as the heart of its communities which has grown out of its response to the Covid pandemic. This saw the Club transformed into a community hub – delivering support and more than 500,000 meals to local families and isolated individuals. “The Club was named the EFL’s Community Club of the Year for the season 2020/21 as a result of this invaluable work. This philosophy has continued following the easing of Covid restrictions and the return of fans to sporting stadia. For example, the Port Vale Foundation does sterling work with all age groups – including the creation of its Golden Valiants social group for over-50s which is now a thriving community of its own.”

“At Port Vale we have invested a great deal of time and resource in enhancing the match day experience for supporters during the 2021/22 season – including the introduction of half-time entertainment and the creation of the Staffordshire University FanZone, which provides entertainment and refreshments to home supporters on match days. Communication with fans is key to everything the Club does and the creation of a supporter database, an improved match day programme (also available digitally), and a significant uptick in social media and video output has really raised levels of engagement.”

“Meanwhile, the evolution of the Club’s Junior Valiants scheme – which has seen the number of young Season Ticket holders rise from around 200 to 1,400 – is proof of the genuine endeavour to nurture a welcoming, inclusive and family-friendly environment at Vale Park. “

THE PORT VALE FOUNDATION DOES STERLING WORK WITH ALL AGE GROUPS – INCLUDING THE CREATION OF ITS GOLDEN VALIANTS SOCIAL GROUP FOR OVER-50S WHICH IS NOW A THRIVING COMMUNITY OF ITS OWN.

Carol Shanahan, Port Vale Chair
Supporter Liaison Officers (SLOs) are a vital link between supporters and their Clubs, enhancing communication and creating stronger, more meaningful relationships. The results show that 37% of supporters are aware of their Club's Supporter Liaison Officer (SLO), even if some of them are unaware of how to contact them. On the bright side, awareness of Supporter Liaison Officers has improved since before the pandemic, highlighting the ever-important role that they play in facilitating supporter relationships with their Club.

Supporter awareness of the SLO role has increased

54% in 2019 ➡️ 65% in 2022

**KNOWLEDGE OF SUPPORTER LIAISON OFFICERS (SLOs):**

- I am aware of my Club’s SLO and how to contact them if needed: 21%
- I am aware of my Club’s SLO but I’m not sure how to contact them: 16%
- I am unaware of my Club’s SLO but have heard of the role before: 28%
- I have not heard of the role before: 35%
As supporters are integral to the EFL experience, the importance of effective fan engagement cannot be understated. It is a requirement across the EFL that all Clubs appoint a Supporter Liaison Officer (SLO) and the creation of the role has helped to formalise fan engagement processes and assist in enhancing two-way communications between Clubs and their supporters.

Aside from the basic principles of the role, Clubs can approach it in a manner that suits them, but fundamentally an SLO will take on a unique position - someone who is both an advocate for the views of supporters and fan groups, while also being a source of key information and advice for their Club’s hierarchy. SLOs will therefore play an integral role in coordinating Structured Engagement sessions and can often help facilitate smaller meetings and forums to look to discuss issues that matter to specific fan groups.

SLOs will therefore often need to have their ‘ear to the ground’, providing supporters with a point of contact, assisting with a broad range of areas relating to both home and away matchday experience, safety matters, and logistics of match travel and ticketing. It’s key therefore that much of an SLO’s role will be to liaise internally with other departments, all ultimately for the benefit of information sharing and relationship building with supporters.

In this sense it is beneficial for SLOs to build a profile in the eyes of their supporter base, and it is therefore encouraging to see the positive trend in the 2022 survey responses in terms of supporters’ awareness of their SLO.

One of those Clubs, Barrow AFC, were only promoted to the EFL in 2020, and the Club’s SLO, Chris Altreet, spoke to the EFL on the steps he’s taken to build his profile and acclimatise to life in League Two.

“Having joined as SLO during the pandemic, I’ve worked with the Club’s board and other staff to elevate our communication with supporters, running online Q&As, using the official website to provide updates, creating an SLO Twitter account, and appearing on local radio amongst other things.

One of the key additions was the creation of our monthly podcast, to provide the latest news and insight and allow fans to put questions to us, the Board and senior Club officials, which are then answered as part of the podcast schedule. We’ve built up quite an audience since it launched and I understand many fans listen to it on their travels to home and away games.

Around matchdays we’ve also added a team of SLO assistants to help the stewards and supporters and looked to establish where we can improve the matchday experience for our supporters. Overall we’re pleased with the progress but the aim is to keep building the connections between Club and supporters.”

At Millwall, SLO Shona Groves has also been on a journey since her appointment as SLO, having started in 2017 as DLO and Ticket Office Assistant, she was appointed Supporter Liaison Officer in 2020. The key to progress for any SLO, as Shona points out, is listening and learning about the Club and its fans.

“In all my time here I’ve been operating in a supporter-facing environment, so have been able to build-up experience and knowledge. Every SLO will bring certain qualities to their role but for me it’s about embracing the Club, learning about its history, its challenges and its opportunities. Above all else - it’s caring about the views of all your supporters, to assist them as best you can. Thinking about things from a fan-perspective is crucial to understand the things that are important to the fanbase at any given time.”
CLUB VALUING OF SUPPORTERS

To what extent do you feel that your Club values you as a supporter, on a scale of 0 to 10 where 0=I do not feel valued at all and 10=I feel extremely valued?

Fans invest time, money and emotions into their Club, so it’s important that they feel valued in return. So, when we see positive numbers here, it’s an excellent measure of the strength of Club relationships with fans. And that’s just what we’ve seen, with the data telling us supporters are feeling even more valued by their Clubs than in 2019, highlighting improved fan engagement delivered by EFL Clubs in the last three years.

Another great stat is that female fans and under-25s are feeling the most valued of the various demographic fan profiles. We can see a number of Clubs are leading the way with building strong relationships with their fans.

HOW CLUBS CAN MAKE FANS FEEL EVEN MORE VALUED

In what ways does your Club help you to engage with it?

So, what can EFL Clubs do to improve fan relationships even more? ‘Players acknowledging fans’, ‘regular communication with fans on Club matters’ and ‘upholding and understanding of heritage and community’ and ‘updates’ by owners and senior decision-makers, are specifically what fans value the most. EFL player recognition of fans is clearly an important catalyst for building fan relationships, and so it’s great to see 65% of fans have experienced just that.

On the other hand, while nearly half of fans value communication directly from those at the helm of their Clubs – many don’t actually experience this. As a result, this would be a great area for Clubs to focus on if they haven’t already.
The Importance of Winning

**Attitudes Towards the Importance of Winning**

How important is each of the below, compared to winning?

What's interesting is that performance on the pitch has a significant influence on supporters' lives. It really matters to them deeply. What also became clear is fans value the future of their Clubs just as, if not more, highly than winning.

Many of them share the opinion that bringing in younger fans to the game is crucial to the future success and growth of their beloved Clubs, with passing the torch onto the next generation being as important or more important than winning for 74% of supporters.

A family-friendly stadium atmosphere is a must for the next generation of fans to be introduced to the game in a welcoming environment - we'll cover this in more detail in the matchday experience section.

'Creating memories' and 'showing loyalty to my Club' were also top of the list over winning for a number of supporters.

**Factors of Importance Compared to Winning:**

- To pass the support of my Club on to future generations
  - Much more important than winning: 26%
  - Slightly more important than winning: 14%
  - As important as winning: 34%
  - Slightly less important than winning: 14%
  - Much less important than winning: 12%

- Creating memories
  - Much more important than winning: 22%
  - Slightly more important than winning: 17%
  - As important as winning: 39%
  - Slightly less important than winning: 15%
  - Much less important than winning: 6%

- Showing loyalty / support to my Club
  - Much more important than winning: 22%
  - Slightly more important than winning: 15%
  - As important as winning: 43%
  - Slightly less important than winning: 14%
  - Much less important than winning: 5%

- Sharing the experience with my family / friends
  - Much more important than winning: 12%
  - Slightly more important than winning: 12%
  - As important as winning: 46%
  - Slightly less important than winning: 19%
  - Much less important than winning: 12%

The thrill, excitement and energy of the matchday experience remain at the heart of football and it continues to pull in crowds and maintain fans' passion for the game. There's really nothing like it.

As we discovered in previous surveys, EFL Clubs really are a central part of fans’ wider lives. What’s encouraging to see is that supporters recognise that Clubs are playing an important role in the community too, underscoring the human value of EFL Trust initiatives and the incredible £59 million invested in communities every year.

Sharing the joy of the matchday experience with loved ones and family remains at the heart of why supporters want to attend. It's great that so many longstanding fans took the time to have their say in this survey, many of whom can see the importance of converting younger generations to supporters.

To sum up, fan relationships with EFL Clubs are generally strong and have improved in the last three years, despite the pandemic. Looking ahead, the relationship between fans and Club ownership is vital, with direct communication key to making fans feel valued.
of supporters say socialisation with family and friends is a key motivation for match attendance.
WHAT THE FANS HAVE TOLD US

While a love of the game and matchday atmosphere are core reasons that fans watch their Clubs, match attendance is also deeply ingrained in family and social life for a vast majority of EFL supporters. On the other hand, lifestyle factors beyond the control of EFL Clubs are often a barrier for some fans, but it seems supporters have certainly returned after being forced to watch football behind closed doors over the 2020/21 season.

ATTENDANCES

NUMBER OF GAMES ATTENDED

Approximately how many games do you attend in a season?

It’s great to see that fans who took part in the survey are committed attendees, with the number of home fixtures attended in an average season at 14 – 15 and 93% having attended a home fixture. As you might expect, average away fixture attendance is lower, with fans telling us they attended three times more away matches than home matches.

AVERAGE HOME GAMES ATTENDED

AVERAGE AWAY GAMES ATTENDED

HOME GAMES

AWAY GAMES

<table>
<thead>
<tr>
<th>Range</th>
<th>Percentage</th>
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<tr>
<td>0-5</td>
<td>20%</td>
<td>0-5</td>
<td>17%</td>
</tr>
<tr>
<td>6-10</td>
<td>11%</td>
<td>6-10</td>
<td>5%</td>
</tr>
<tr>
<td>11-15</td>
<td>8%</td>
<td>11-15</td>
<td>5%</td>
</tr>
<tr>
<td>16+</td>
<td>61%</td>
<td>16+</td>
<td>73%</td>
</tr>
</tbody>
</table>

Approximately how many games do you attend in an average season? n: 38,182
FAMILY IN FOOTBALL

MOTIVATION TO ATTEND LIVE FOOTBALL
Which of the following motivates you to attend live football?

Stadium atmosphere wins hands down when it comes to why fans attend live fixtures, and 70% of supporters enjoy everything about the live matchday experience.

It’s clear that football plays an important role in the social and family aspects of supporters’ lives. The matchday experience is at the heart of this, with 66% of supporters saying that the chance to socialise with family and friends is a key reason why they attend fixtures – an opinion that’s shared by more fans this year, than we saw in our 2019 survey. This clearly indicates the importance of the great work taking place at Clubs across the League to enhance the matchday experience for families, and attract and retain supporters of all ages.

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>I enjoy the atmosphere in the stadium</td>
<td>85%</td>
</tr>
<tr>
<td>To show loyalty to my Club</td>
<td>72%</td>
</tr>
<tr>
<td>I enjoy everything about the live matchday experience</td>
<td>70%</td>
</tr>
<tr>
<td>It’s a chance to socialise with family / friends</td>
<td>66%</td>
</tr>
<tr>
<td>It’s the main way I can watch my Club’s games</td>
<td>58%</td>
</tr>
<tr>
<td>It’s good for my mental health</td>
<td>50%</td>
</tr>
<tr>
<td>To enjoy the Club’s hospitality</td>
<td>10%</td>
</tr>
</tbody>
</table>

Which of the following motivates you to attend live football? n: 35,812

66% of fans said a motivation to attend live football is that “it’s a chance to socialise with family/friends” (vs 53% in 2019)
Blackburn Rovers

CASE STUDY

Previous EFL Family Club of the Year Winners, Blackburn Rovers, pride themselves on creating an engaging and inclusive matchday experience for all supporters. While the Club has been continuously developing its facilities and matchday activities, the Covid Pandemic provided even sharper focus for them to find new ways of reaching out to attract and retain Rovers supporters of all ages. The Club’s Head of Operations, Lynsey Talbot, is rightly proud of the work they have achieved, and the positive way in which their fanbase has responded.

At Blackburn Rovers we take great pride in being one of the most family-friendly football Clubs in the country – a commitment that was highlighted when we were named the EFL’s Family Club of the Year in 2018, having won our divisional award two seasons running.

The Club offers a wide range of family-themed activities on matchdays, with the aim of both attracting new fans from across our local community to attend, while providing the best possible experience for existing supporters at each fixture.

Over recent years, the Club has invested in both staff and facilities to improve our matchday offering in areas such as our FanZone, which attracts local music artists, various stalls and inflatable football challenges, as well as our Strikers’ Lounge, Sensory Room and GAME Room.

We have a dedicated Family Stand, which is sponsored and supported by our award-winning Community Trust, which brings our young supporters closer to the pitch and creates lasting memories when they are able to interact with their Rovers heroes. Our child priority lane and special group offers on refreshments have also proved particularly popular in this area.

We also continue to make great strides with engaging with our diverse local community, with our ‘Ewood Express’ initiative – which helped us win this year’s EFL Diversity Award – being a standout success. The special travel service, which brought over 2,500 local youngsters to home games last season, provides children from local schools, mosques, community groups and grassroots football teams, who wouldn’t normally be able to attend games, with the opportunity to experience live football at Ewood Park at an affordable price.

The Ewood Express initiative forms an integral part of our wider Next Generation strategy, which aims to attract fans of the future to Ewood Park.

Our Halal food offering, including a new Blackburn Rovers Biryani, alcohol-free areas inside the stadium and promoting our Prayer Room via the Club’s communication channels have also helped to attract new supporters from our local South Asian community.

Blackburn Rovers fans say their Club provides an inclusive, accessible and enjoyable matchday experience for all supporters (69% EFL average)

81% of Blackburn Rovers fans agree that their Club helps promote inclusivity within the game and wider community

After a full season (over 18 months in fact) without supporters inside Ewood Park due to the pandemic, our strapline ahead of the 2021-22 season was ‘Back to Live’, with a key focus on welcoming fans back to the stadium.

Stringent safety measures were put in place in order to offer reassurance to all players, staff and supporters inside the stadium and to ensure that our fans could continue to support the team with confidence throughout the course of the campaign. Player videos and social media messages were produced and regularly communicated to encourage everyone visiting Ewood Park to adhere to our Code of Conduct, to apply common sense and to follow some important steps out of respect and consideration for their fellow fans.

We’re delighted that supporters were able to enjoy every home match at Ewood Park this season, and that our community has responded so positively to our continuing work to engage and attract them to be part of the family at Blackburn Rovers.

79% Blackburn Rovers fans say their Club provides an inclusive, accessible and enjoyable matchday experience for all supporters (69% EFL average)
**BOUNCING BACK FROM COVID**

**IMPACT OF COVID ON ATTENDANCE**

How, if at all, has the COVID pandemic impacted your attendance so far during the 2021/22 season, compared to an average season?

Interestingly, for 62% of fans, Covid has had no impact at all on the number of home games they attended during the 2021/22 season. In fact, 8% attended more games than usual - showing just how much fans have missed being absorbed in the thrill of live football for 90 minutes.

Even though traditional away game transport means there’s more social mixing on the journey, supporters told us that the pandemic has influenced their away game attendance only a little more than it has their home attendance.

The results also indicated that fans aged over 65 may have felt more hesitant to return to live football. As has been shown throughout the 2021/22 season, Clubs have continued to adapt elements of their matchday experience, to help provide a safe and welcoming environment.

**SOCIAL ACTIVITY**

**ATTENDANCE COMPANIONS**

Who do you usually attend matches with?

- **My friends**: 51%
- **My immediate family**: 34%
- **My children**: 33%
- **My partner / spouse**: 20%
- **I attend alone**: 10%
- **Other children**: 8%
- **My extended family**: 8%

It might not come as a surprise that for 90% of fans, match attendance is a social activity with friends and family. After all, as fans have already told us it is important for many of them to share the experience with others, and attending a match is one way of bringing families and friends together.

The results told us that 39% of over 35s have kept Club support in the family, as they place a great deal of importance on growing the next generation of Club supporters. In contrast, fans under 35 are more likely to attend with friends.

Focusing on gender now; female fans are much more likely to attend with their partner/spouse, although of the 2.9 million women attending EFL matches per season, many more are watching with friends and other female fans than ever before.
MOTIVATION TO PURCHASE SEASON TICKETS
What are your main reasons for purchasing your season ticket?

It’s great to see that 63% of the fans who took part in the survey were season ticket holders, while 18% of them had previously held one. As you might expect, fans with a season ticket show unwavering loyalty, with season ticket holders coming to watch their team’s 19 home games on average per season – a clear demonstration of the passion they have for their Clubs.

One fact that came to light was that the main reason for purchasing season tickets was to watch or support their Club, followed by a guaranteed seat. When we look at this by division, Championship supporters were more concerned with claiming their seat, while for League Two supporters, showing loyalty was more important.

For younger supporters the key motivator to purchase a season ticket was to spend time with family and friends. But for older supporters, the value was in guaranteeing a seat – a key insight to inform season ticket sales strategy for EFL Clubs for different demographics.

- To watch / support my Club live: 84%
- It guarantees me a seat for all regular season home games: 76%
- It demonstrates loyalty towards my Club: 67%
- It is cheaper than buying tickets individually: 60%
- To spend time with family / friends: 50%
- It gives me priority booking access for cup and away league games: 49%
- Additional benefits / membership: 24%
- Other: 2%

65% of under 35s are motivated to spend time with family / friends (vs 47% of over 35s)
SEASON TICKET RENEWAL

Which of the following reason(s) best describe why you no longer hold a season ticket?

Just as we saw in the 2019 Supporters Survey, lifestyle factors outside of EFL Club control are the biggest barriers to renewal for lapsed season ticket holders.

For example, one of the most common barriers for supporters is work or family commitments, followed by distance to the stadium. It seems that distance is actually more of a significant challenge for Championship and League One supporters to overcome, compared to League Two supporters. This seems to show a more localised supporter base.

The data also shows us that 29% of fans are still purchasing individual match tickets as opposed to season tickets, which comes with a lower level of commitment and flexibility to attend fixtures when it suits them. Finally, compared to three years ago, we discovered that fewer supporters perceive cost of season tickets as a barrier.

**Reason for lapsing season ticket:**

- Work / family commitments: 40%
- I no longer live close enough to the stadium: 29%
- I purchase tickets for individual matches instead this season: 29%
- Lack of disposable income: 16%
- Dissatisfaction with Club ownership: 13%
- Season tickets are too expensive: 13%
- Unsure / uncertain due to current COVID-19 situation: 13%
- Other: 10%

**Cost of season ticket:**

- 20% in 2019 vs 13% in 2022

ENCOURAGING SEASON TICKET PURCHASES

Which of the following would encourage you to purchase a season ticket (again)?

Time was the top barrier to repurchase this year, with just over a third of lapsed season ticket holders telling us that if they had more time to attend matches, it would encourage them to repurchase.

On a similar theme, for 13% of fans fixtures being selected and moved for broadcast impacted their decision. Unsurprisingly this was a view mainly held by Championship fans, as the League with the most TV selections each season.

**Fixtures not being moved for broadcast as frequently**

- 23%
- 6%
- 2%

On top of this, 32% called for cheaper season tickets, with Championship supporters and under 35s the most likely to see season ticket prices as a barrier.

**Factors to encourage re-purchase of season tickets:**

- If I had more time to attend: 34%
- Cheaper season ticket prices: 32%
- If I lived closer to the stadium: 30%
- If I had more disposable income: 24%
- Better team performances: 15%
- Fixtures not being moved for broadcast as frequently: 13%
- Change in Club ownership: 13%
- Having the opportunity to stand at matches: 11%
- Improved stadium facilities: 11%
- Other: 7%

18% of respondents previously held a season ticket.
Motivation to Attend a Game

To what extent does each of the following factors influence your decision to attend a game (Home & Away)?

When it comes to home match attendance, friends, family and Club performance are most likely to influence attendance. But when it comes to away attendance, logistical reasons such as travel distance and the associated costs, are most likely to influence fans.

The second biggest influence on both home and away match attendance is the match time and date. But we did see that it’s less than half as likely to influence supporters’ decision to attend an away day in 2022, compared to supporters surveyed in 2019. This would seem to show that supporters have more flexibility to travel after the pandemic.

Factors That Influence Home Game Ticket Purchase:

- If friends or family are attending: 25%
- When the match is played: 23%
- My Club’s performance: 18%
- Kick-off time: 16%
- If it’s a big game: 15%
- The distance to travel to the game: 14%
- The cost of buying a ticket: 8%

Factors That Influence Away Game Attendance:

- The distance to travel to the game: 46%
- When the match is played: 28%
- The cost of travelling to the game: 24%
- Ticket availability: 23%
- If friends or family are attending: 22%
- If it’s a big game: 16%
- The cost of buying a ticket: 14%

*Factors below 14% total have not been included.

Which of the following factors, if any, most influence your decision to attend away games? n: 27,632

- The distance to travel to the game: 46%
- When the match is played: 28%
- The cost of travelling to the game: 24%
- Ticket availability: 23%
- If friends or family are attending: 22%
- If it’s a big game: 16%
- The cost of buying a ticket: 14%

28% stated that when the away match is being played influences their attendance (vs 58% in 2019)
**TICKET PURCHASING**

**PURCHASE RATING**

How would you rate your Club on the following factors, on a scale of 1-5 where 1=very poor and 5=very good?

<table>
<thead>
<tr>
<th>Factor</th>
<th>5 – very good</th>
<th>4</th>
<th>3 - neutral</th>
<th>2</th>
<th>1 – very poor</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attitude/helpfulness of Club staff</td>
<td>51%</td>
<td>29%</td>
<td>15%</td>
<td>3%</td>
<td></td>
<td>4.3</td>
</tr>
<tr>
<td>Ticketing information provided (e.g. pricing options, ticket availability)</td>
<td>43%</td>
<td>34%</td>
<td>18%</td>
<td>4%</td>
<td></td>
<td>4.1</td>
</tr>
<tr>
<td>A clear Covid policy</td>
<td>42%</td>
<td>28%</td>
<td>24%</td>
<td>4%</td>
<td></td>
<td>4.1</td>
</tr>
<tr>
<td>Ticketing / seating options within the stadium</td>
<td>42%</td>
<td>34%</td>
<td>18%</td>
<td>3%</td>
<td></td>
<td>4.1</td>
</tr>
<tr>
<td>The ticket purchase process (e.g. refund process, print at home option etc.)</td>
<td>42%</td>
<td>30%</td>
<td>20%</td>
<td>6%</td>
<td></td>
<td>4.0</td>
</tr>
</tbody>
</table>

Supporters were really impressed with the attitude/helpfulness of Club staff - a testament to the often unsung heroes who are integral to positive fan experiences.

Fans also think the level of information and choice they have access to is good, as well as the overall ticketing process offered by EFL Clubs. Despite unknown territory presented by the pandemic, fans also generally agreed that Covid ticketing terms and conditions have been easy to understand.

**WHERE AND WHEN TICKETS ARE PURCHASED**

Where do you usually buy your matchday tickets from?
When do you purchase ticket for home games and away games?

The majority of fans told us they head online to purchase matchday tickets via their Club’s ticketing website, and nearly all get ahead of the game and purchase in advance. Clearly buying tickets is front of mind for fans, highlighting the importance of timely sharing of ticketing information and easy ticket purchase processes.

All fans, regardless of their EFL Club, have the option to buy their tickets online. Despite this, 23% of supporters – ‘traditionalists’ – buy tickets in person, with League Two Club supporters more likely to pay a visit to the ticket office than Championship and League One Club supporters.

To underline this, League Two Clubs should expect that on average, 18% of their supporters will purchase home tickets on the day.

**WHERE FANS PURCHASE TICKETS:**

<table>
<thead>
<tr>
<th></th>
<th>Club website</th>
<th>In Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club ticketing website</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Ticket office in person</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Someone else purchases for me</td>
<td>14%</td>
<td>67%</td>
</tr>
<tr>
<td>Ticket office by phone</td>
<td>11%</td>
<td>36%</td>
</tr>
<tr>
<td>Club app</td>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>

![3 in 4 fans purchase from the Club ticketing website](image)

85% of under 35s purchase on the Club website
(vs 72% of over 35s)

Where do you usually buy your matchday tickets from? n: 35,812
MATCHDAY TRAVEL

TRAVELLING TO GAMES

Which of the following is your usual chosen method of transport when travelling to games? When travelling back from evening away matches or away matches which require significant travel via public transport, how easy or difficult is it usually to get back home on a scale of 1 to 5 where 1 = very difficult and 5 = very easy?

Travelling to and from games is a significant part of the matchday experience for supporters. When it comes to home matches, getting there by car is by far the most popular for 67% of fans attending home matches. A large majority of fans also drive to away games.

Public transport scores well for away matches with 38% of supporters using either a Supporters’ bus or train (it's a great way to chat through all the action) and 10% choosing to attend home fixtures on foot. However, using public transport to attend midweek evening away action poses difficulties for a number of fans, with only 25% finding the journey back easy.

What's also interesting is that League Two supporters are more likely to walk to games, once again suggesting that they’re more likely to be local to their Club ground than League One and Championships fans.

25% Find public transport back from midweek away games to be easy

LET’S ROUND UP

Putting it all together supporters have told us that they’re avid attendees – demonstrating an incredible commitment to step through the turnstiles of their home grounds, in spite of Covid.

We’ve seen that the biggest challenge for fans to attend matches is balancing all the commitments in their lives. This is made all the more challenging for them with cross country away fixtures, and compounded even more with fixtures where the date and time are out of the ordinary.

What’s the takeaway for EFL Clubs? Well, it’s important to help ease these challenges where possible, creating a matchday environment that caters for families, female fans and over 35s, as well as affordable and accessible travel options.

What’s clear is that regardless of age, gender or any other demographic variable, experiencing the thrill and excitement of matchdays with family and friends is at the core of why EFL fans love to be there in person, and why they continue to purchase match and season tickets.
OVERVIEW

Over the following pages we’ll analyse the matchday experience created for supporters by EFL Clubs. We’ll look at supporter opinions on atmosphere, safety and refereeing, as well as fan activities outside of the match. As you’ll see, diversity and inclusivity are a core theme of this chapter, with the data giving us the chance to measure matchday experiences across various communities.
WHAT THE FANS HAVE TOLD US

We can see from the data that fans flock to stadiums to enjoy the unique live football atmosphere provided by their Club. What makes this all the more enjoyable for supporters, is knowing that the environment and experience will be a safe one.

As well as safety, Clubs have a responsibility to create an inclusive experience for their supporters, so it’s great news that all fan groups have rated highly safety, inclusivity and the overall matchday experience provided by their Clubs.

ARRIVING AT THE GROUND

ARRIVAL TIME AT GAMES
On average, how long before kick-off do you normally arrive at the stadium?

It’s perhaps no surprise that 44% of fans arrive at the stadium less than 30 minutes before kick-off. But on the other hand, we can also see that 66% of them (the majority) are arriving between 30 mins to 90 mins before. In a reverse of arrival times at home games, fans travelling to away games tend to arrive earlier, with 71% telling us that they like to get to away stadia more than 30 minutes before kick-off.

ARRIVAL TIME AT GAMES:

<table>
<thead>
<tr>
<th>HOME GAMES</th>
<th>AWAY GAMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 30 mins</td>
<td>44%</td>
</tr>
<tr>
<td>31 mins – 1 hour</td>
<td>30%</td>
</tr>
<tr>
<td>More than an hour</td>
<td>27%</td>
</tr>
</tbody>
</table>
PRE-MATCH BEHAVIOURS

Which of the following do you usually do when arriving at the stadium or stadium vicinity?

What’s great for Clubs is that 82% of supporters are engaging in some form of pre-match activity ahead of the game. Buying food or drinks to enjoy at the stadium is the most popular pre-match activity and 50% will purchase a programme on matchdays, with most of them buying physical copies rather than digital copies.

It seems supporters who’ve never held a season ticket and attend fewer fixtures are most likely to spend money at the stadium, putting a spotlight on the importance of Clubs not only satisfying regular attenders and season ticket holders, but also ensuring a memorable matchday experience for newcomers and infrequent attenders.

PROGRAMME PURCHASING

How often do you purchase a match day programme?

- Physical: 48%
- Digital: 43%
- I never purchase a matchday programme: 7%
- My Club doesn’t produce a matchday programme: 4%

If you purchase a matchday programme, would it be a digital or physical version? n= 35,182

PREMATCH BEHAVIOURS:

- Purchase food or soft drinks at the stadium: 45%
- Go to a local Pub: 35%
- Visit Club shop: 30%
- Purchase alcoholic drinks at the stadium: 30%
- Purchase food or drink from a nearby, independent vendor: 26%
- Visit a Club bar / restaurant / hospitality: 19%
- Visit a fan zone: 10%
- None of these – I go straight to my seat: 18%

Which of the following, if any, do you do on a matchday when arriving in and around the stadium vicinity? n= 35,328
WHAT’S IMPORTANT TO SUPPORTERS

This chart plots scores for both satisfaction (Y-Axis) and importance (X-Axis) of key aspects of the match-day experience.

- Low importance but high satisfaction: nice to have factors to maintain
- High importance and high satisfaction: areas to maintain
- Low satisfaction but also of low importance
- High importance but low satisfaction: areas to improve

How important are the following in creating a positive match day experience, on a scale of 1 to 5 where 1=not at all important and 5=very important?
How would you rate the following aspects of matchday experience at your Club, on a scale of 1 to 5 where 1=very poor and 5=very good?
MATCHDAY SATISFACTION

MATCHDAY SATISFACTION RATING

How would your rate your Club’s overall matchday experience, on a scale of 0 to 10 where 0=very poor and 10=excellent?

It’s great to see that, overall, fans are satisfied with the experience their Clubs provide on matchdays – in fact, even more so than in 2019. We can see this improved positivity comes from League One and League Two Club supporters, while Championship Club fans have remained consistently pleased with their matchday experience since 2019. We also found that satisfaction with the experience at League One fixtures is now on a level with Championship fixtures.

MEAN SATISFACTION ACROSS THE EFL IS UP COMPARED TO THE 2019 SUPPORTERS SURVEY - FAN MATCHDAY SATISFACTION SCORE IS 7.9 out of 10 on average

Mean / 10

MATCHDAY SATISFACTION:

0–6 14% Not satisfied

7–8 52% Neutral

9–10 34% Satisfied

↑ up from 7.6 in 2019

↑ up from 7.4 in 2019

7.9 out of 10 on average

Matchday satisfaction was 7.8 in 2019
CASE STUDY

LINCOLN CITY - MATCHDAY EXPERIENCE

Lincoln City have worked hard for many seasons in providing a memorable matchday experience for all home and away supporters. Key to this work has been their approach to fan engagement and consultation, understanding that by asking fans and families what they would like from their experience, they are in a much better position to make positive changes to deliver it.

We caught up with the Club’s Head of Supporter Services, Rob Noble, to hear some more details on how they have gone about enhancing the experience for all matchday attendees.

City work hard to provide an engaging and welcoming matchday atmosphere and our average crowd has grown to close to 9,000. Just five years ago our average was less than a third of that.

One area of success has been the groundbreaking Lady Imps Supporters Association, who celebrated their fifth birthday in 2021/22. They help us through much more than just being a highly visible role model for female fans. Their co-founder Maria Ryder sits on our EDI working group and leads on projects such as our Fans For Diversity replica shirt which was designed to represent the Club’s heritage and modelled for launch by our diverse fanbase. Our #ImpsMatchdayWelcome saw LISA purchase season tickets which they use to invite people who would not normally come to games - targeting groups in our community which are under-represented in our fanbase.

We’ve worked hard to create a friendly atmosphere for everyone attending the game, with our Fan Village open to supporters from both Clubs. Like many traditional stadiums we are limited for space, but we’ve created an area where supporters can access a variety of local food options while enjoying interviews and interactive games from our Foundation and a Club partner who provides VR experiences. We aim to cater for the full spectrum of fans - from youngsters who want certain activities, to those who want to listen to former players, through to our moments of magic in the ground, where we take families pitchside and invite a young fan to read out the teams. We’ve leaned into the challenges of space and, as the Fan Village can be secured during the match for access control, we open it up for fans at half-time which substantially increases the food options for supporters as well as the speed at which they can be served. Fans get all this information via social media and an email beforehand, for those who still have questions we’ve introduced a ‘Here to Help’ team of clearly-identifiable stewards who are briefed even further on the areas of fan-related topics.

Our Foundation put on activities from 9am, with free coaching sessions put on from 1-2pm to encourage families to come down early. We encourage social media interaction by asking people to choose our matchday music and sharing images from the #ImpsSelfie hashtag. We identify first-time supporters for photos which are also shared on social media and as the primary images in our matchday fan galleries.

Our integration does not stop here, with an email going out to invite feedback, as well as regular calls through other channels - and not just official Club channels, we’ve used methods such as our CEO’s programme notes or high-profile staff’s social media accounts.

WE AIM TO CATER FOR THE FULL SPECTRUM OF FANS - FROM YOUNGSTERS WHO WANT CERTAIN ACTIVITIES, TO THOSE WHO WANT TO LISTEN TO FORMER PLAYERS, THROUGH TO OUR MOMENTS OF MAGIC IN THE GROUND, WHERE WE TAKE FAMILIES PITCHSIDE AND INVITE A YOUNG FAN TO READ OUT THE TEAMS

Rob Noble,
Head of Supporter Services

8.5/10
Lincoln City fans rate their overall matchday experience
The average EFL Club matchday experience score is 7.9/10
At any game, at any EFL Club, it’s vital that matchday is a welcoming environment for supporters from all communities and backgrounds. The EFL, via the Code of Practice, supports Clubs who proactively ensure diversity and inclusivity are embedded in their culture, with the view of driving positive change. It’s why monitoring perceptions of supporters from various groups and communities is so important to progress.

It’s therefore really encouraging fans have told us that EFL Clubs provide a positive, inclusive and enjoyable experience on matchdays for all fan groups, which is testament to the fantastic work that many EFL Clubs do to facilitate this. Interestingly, disabled and female fans are even more satisfied with the matchday experience than the average EFL supporter, and generally feel that their Club is inclusive to all.

Meanwhile, LGBTQ+ and ethnically diverse fans are positive about the matchday experience provided by their Clubs, but less so than other groups, highlighting to EFL Clubs that a continuously developing diversity and inclusivity strategy is a necessity.

Based on your usual matchday experience, to what extent do you agree with the following statement, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

**“MY CLUB PROVIDES AN INCLUSIVE AND ENJOYABLE MATCHDAY EXPERIENCE FOR ALL SUPPORTERS, REGARDLESS OF THEIR BACKGROUND, RELIGION, SEXUAL ORIENTATION, ETHNICITY OR DISABILITY”**

<table>
<thead>
<tr>
<th>Statement</th>
<th>All Supporters</th>
<th>Ethnically Diverse Supporters</th>
<th>Disabled Supporters</th>
<th>LGBTQ+ Supporters</th>
<th>Female Supporters</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is important that my Club is a focal point for its local community</td>
<td>4.3</td>
<td>4.2</td>
<td>4.4</td>
<td>4.4</td>
<td>4.4</td>
</tr>
<tr>
<td>My Club welcomes all away fans</td>
<td>4.1</td>
<td>4.0</td>
<td>4.2</td>
<td>4.1</td>
<td>4.2</td>
</tr>
<tr>
<td>My Club’s matchday crowd is representative of the local community</td>
<td>3.9</td>
<td>3.8</td>
<td>4.0</td>
<td>3.9</td>
<td>4.0</td>
</tr>
<tr>
<td>I feel valued by my Club</td>
<td>3.7</td>
<td>3.4</td>
<td>3.7</td>
<td>3.7</td>
<td>3.9</td>
</tr>
<tr>
<td>I have confidence in my Club’s senior decision makers</td>
<td>3.5</td>
<td>3.2</td>
<td>3.6</td>
<td>3.4</td>
<td>3.6</td>
</tr>
</tbody>
</table>
MATCHDAY BEHAVIOUR

EXPOSURE TO ABUSIVE LANGUAGE OR AGGRESSIVE BEHAVIOUR
How often have you been exposed to abusive language or aggressive behaviour at matches in the last six months?

As we know, atmosphere is everything in live football and it’s the responsibility of the EFL, Clubs and supporters to make sure that it’s a positive one, with the EFL and EFL Clubs adopting a zero-tolerance approach to discriminatory language. What's great is that the data shows over half of supporters have never been exposed to discriminatory language in the last six months – almost twice as many supporters as this time three years ago.

53% of fans say they haven’t experienced discriminatory language or anti-social behaviour in the last 6 months
(vs 27% in 2019)

When it comes to behaviour, there does seem to be a certain amount of acceptance among supporters, with 33% of them saying they don’t personally mind foul and abusive behaviour during matchday – but they do find it uncomfortable for others around them, such as children. What's interesting is that there's been a shift downwards in the number of people believing that it's part and parcel of going to football fixtures in the last three years, with only 29% saying this compared to 50% in the 2019 supporters survey.

ATTITUDES TOWARDS TO AGGRESSIVE OR ABUSIVE LANGUAGE
Which of the following best describes your attitude to aggressive/abusive language at football matches?

- I don’t mind it, but I find it uncomfortable for others around me, such as children: 33%
- I don’t mind it and it’s part and parcel of going to football matches: 29%
- There should be no place for aggressive / abusive language at football matches: 22%
- I find it offensive, but I accept it is part of attending football matches: 14%

45% of under 35 fans accept that foul and abusive behaviour is part and parcel of going to matches
(vs 25% of over 35s)

How important is each of the below, compared to your Club winning? n: 38,812
SAFETY AND STEWARDING

PERCEPTIONS OF SAFETY AND STEWARDS
When thinking about your usual matchday experience, how safe do you feel inside the stadium, on a scale of 1 to 5 where 1=not at all safe and 5=completely safe?
In your opinion, how would you rate the overall quality of stewarding on matchdays?

It’s great to see the majority of supporters do feel safe on matchdays, particularly as safety and security during matchday is so important to supporters. The EFL, through a number of initiatives with EFL Clubs, strive to ensure this.

We can see that supporters tend to feel safer at their Club’s home ground than on away days. There’s also a perception of lower quality stewarding at away matches, which could be because fans feel a sense of the unknown when it comes to visiting stadiums for the first time.

Generally speaking, supporters feel that the number of stewards and police at games is just right. When asked to think about the most important role of stewards at their Club, fans felt that stewards’ primary duty is to ensure a safe environment for all, with watching the crowd the key duty. According to a smaller number of fans, it’s also important that stewards support with tasks less associated with safety, such as welcoming and directing supporters, and being representatives for their Club.

SAFETY AT GAMES

Home games

Away games

ROLE OF STEWARDS:

STEWARDING
Overall, what is your opinion on the numbers of Stewards inside football stadia? What do you believe the most important role of your Club’s stewards at matches are?

Number of Stewards at matchdays

ROLE OF STEWARDS:

To provide a safe experience
To watch the crowd for any issues or disorder
To investigate any incident reported
To welcome supporters
To direct and to assist supporters
To reduce ground regulations being broken
To be an ambassador for the Club
To check fans have tickets
Unsure

What do you believe the most important role of stewards at matches are? n=35,812
MATCH OFFICIALS

To what extent do you agree with each of these statements relating to match officials?

Many fans seem to agree that referees have a pretty challenging job, and that it has actually become harder in recent years. This underlines both the importance of Professional Game Match Officials’ (PGMOL) ongoing development of match officials at Select Group 2 and National Group level, and the introduction of the Elite Referee Development Plan (ERDP), which aims to enhance the standards of officiating across the English game as a whole.

On the downside, few believe that supporters treat match officials with respect. Opinions on match officials seem to differ between older and younger supporters, with people over 35 slightly more positive, optimistic and sympathetic, and less likely to have the view that managers and players treat match officials with respect.

AWARENESS OF CAMPAIGNS AND MATCHDAY INITIATIVES

Which of the following EFL campaigns and matchday initiatives are you aware of?

It’s great to see that almost 60% of supporters are aware of the Kick It Out Week of Action campaign, a league-wide initiative that saw EFL captains wearing Kick It Out armbands. What’s also great to see is that 34% of fans were aware of the EFL’s Together Against Discrimination campaign.

It seems that there’s a good general awareness of all EFL initiatives across the three EFL division, which shows that the commitment and participation from all EFL Clubs is making a difference. One interesting fact that came to light is that supporters under the age of 35 were more likely to be aware of EFL campaigns and matchday initiatives, compared to over 35s.

EFL INITIATIVES

<table>
<thead>
<tr>
<th>Campaign/Matchday Initiative</th>
<th>Awareness Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kick It Out (Week of Action)</td>
<td>59%</td>
</tr>
<tr>
<td>Rainbow Laces Campaign</td>
<td>56%</td>
</tr>
<tr>
<td>Kick It Out (Reporting App)</td>
<td>51%</td>
</tr>
<tr>
<td>Together Against Discrimination</td>
<td>34%</td>
</tr>
<tr>
<td>EFL Official Charity Partnership – Mind</td>
<td>18%</td>
</tr>
<tr>
<td>Not Today or Any Day</td>
<td>18%</td>
</tr>
<tr>
<td>Level Playing Field Week of Action</td>
<td>9%</td>
</tr>
<tr>
<td>EFL Code of Practice</td>
<td>9%</td>
</tr>
<tr>
<td>Stand Up For Choice</td>
<td>8%</td>
</tr>
<tr>
<td>EFL Family Excellence Scheme</td>
<td>6%</td>
</tr>
<tr>
<td>EFL Day of Action</td>
<td>5%</td>
</tr>
<tr>
<td>EFL Enjoy the Match Campaign</td>
<td>5%</td>
</tr>
<tr>
<td>EFL Away Fan Experience Campaign</td>
<td>4%</td>
</tr>
<tr>
<td>None of these</td>
<td>14%</td>
</tr>
</tbody>
</table>

MATCH OFFICIALS

OPINION ON MATCH OFFICIATING:

Match officials have a difficult job

46% |

The job of match officials has got harder in the modern game

37% |

Referees and other officials treat players and managers with respect

12% |

Managers treat match officials with respect

8% |

Players treat match officials with respect

7% |
For many fans, the matchday experience starts long before kick-off, especially for those who watch games less frequently. We found that this group of fans are more likely to spend money on food and drink, matchday programmes, and spend time in the Club shop.

During the 90 minutes, fans are generally pleased with the quality of stewarding in the EFL, and there’s an appreciation for referees and the challenging role they have. When it comes to what makes an incredible matchday for fans, other than winning, fans have told us they are looking for a positive, safe and welcoming atmosphere around the stadium.

It’s really encouraging to see that almost all fans, regardless of background, religion, sexual orientation, ethnicity or disability feel safe and satisfied, and that their Clubs are inclusive. Reports of discriminatory language are down and there has been a shift towards fans being less accepting of abusive behaviour. It’s clear from the data that attitudes have shifted slightly from the last 2019 survey, moving in a positive direction.

### Match Officials

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Under 35s (%)</th>
<th>Over 35s (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match officials have a difficult job</td>
<td>65%</td>
<td>77%</td>
</tr>
<tr>
<td>The job of match officials has got harder in the modern game</td>
<td>48%</td>
<td>69%</td>
</tr>
<tr>
<td>Referees and other officials treat players and managers with respect</td>
<td>33%</td>
<td>43%</td>
</tr>
<tr>
<td>Managers treat match officials with respect</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>Players treat match officials with respect</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>There are some promising young officials emerging across the EFL</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>The quality of match officials has improved over recent seasons</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Supporters treat match officials with respect</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>
OVERVIEW

In this section, we’ll explore how fans access online content on matchday – the results were very interesting, and at times unexpected. Added to this, we’ll consider the various ways that fans get information about their Club, the EFL and football in general, whether that’s through official Club sources, other online sources, broadcast, digital and print.
WHAT THE FANS HAVE TOLD US

With online content continuing to grow in popularity, communicating with supporters across a number of these key channels is now an important part of the full matchday experience. Supporters who choose to follow their Club online increasingly have an expanding range of content and information at their fingertips. Clubs are therefore looking to create content that is fresh, relevant and speaks to different audiences.

The results in this chapter indicate that Official Club sources continue to be the most-used source of information, telling us there’s a desire amongst fans for trusted and specific information.

ONLINE CONTENT ON MATCHDAYS

ACCESSING CONTENT

During a match, do you usually access content online via a mobile device?

Digital content is a vital aspect of the matchday experience for supporters, giving them the freedom to share their thoughts and the experience of the game with others. This is shown by the data, with 62% of fans telling us they access digital content when in the stadium. This has actually risen by 4% from the 2019 survey, showing the increasingly important role that digital content plays in matchdays and the need for Clubs to provide information, and to engage fans, during, before and after the game via various channels.

62% access digital content on a matchday

70% of under 35s (vs 61% of over 35s)

ONLINE CONTENT ON MATCHDAYS

SOCIAL MEDIA ON MATCHDAY

What ways do you use social media on a matchday?

We discovered that fans access social media content on matchday in quite a few different ways – the most common one was for score updates. Fans also seem to use social media pre and post-match, with team news the most popular type of content viewed. Match previews and manager and player interviews are popular, but these seem to be viewed by a smaller number of supporters.

Perhaps not surprisingly, the data also told us that when it comes to posting content, younger fans are significantly more likely to post or view pictures and video clips of match play than older fans.

TYPES OF CONTENT ACCESSED:

- Score updates: 86%
- Team news: 77%
- Post a photo of you/friends/family at the match: 29%
- Match previews: 28%
- Manager interviews: 23%
- Video clips of match play: 18%
- Player interviews: 16%
- Posting photos of match play: 15%
- Viewing photos of match play: 12%
HOW EASY IS IT TO ACCESS CONTENT ON MATCHDAYS

EASE OF ACCESSING ONLINE CONTENT
While inside the stadium on matchdays, how easy or difficult is it to access content on your device, on a scale of 1 to 5 where 1=very difficult and 5=very easy?

Even though digital content is a vital part of the matchday experience for fans, there seems to be differences in how easy it is for supporters to access it. For example, 50% of Championship Club supporters find it difficult to access content on a matchday, compared to only 19% of League Two fans.

The results indicate that improvements to online access have been made since the 2019 survey. For instance, 36% of fans say that accessing content is easy or very easy, which is up from 30% three years ago.
MAIN SOURCES OF INFORMATION

Which of the following do you use as your main sources of information about your Club?

The fans told us they want to be able to access information quickly and easily, through sources they trust, with Club websites being the most popular source for information. Great news for EFL Clubs.

An interesting point that came up was that 20% of supporters access information about their Club from their local newspaper, compared to only 3% reading a national newspaper, showing the importance of in-depth coverage that a local newspaper can provide on the action.

For younger fans, Club social media was their go-to source of information, with 59% of under 35s using it. Added to this, female fans are more likely to find information from social media and emails than males. This underlines the importance of website, social and email as key channels for Clubs to engage a fan group who are currently less represented on matchday.

It’s also interesting that 27% of season ticket holders use local radio as a main source of information, compared to 15% of people who haven’t held a season ticket. This shows us how core fans engage with their Club, with phone-ins and discussions a popular format.

**CLUB INFORMATION SOURCES**

<table>
<thead>
<tr>
<th>Source</th>
<th>Use</th>
<th>Females vs Males</th>
<th>Under 35s vs Over 35s</th>
<th>STH vs never held ST</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Club website</td>
<td>60%</td>
<td>43% vs 34%</td>
<td>59% vs 30%</td>
<td>35% vs 36%</td>
<td>9%</td>
</tr>
<tr>
<td>Official Club social media channels</td>
<td>35%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emails from the Club</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BBC Sport online</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local radio</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unofficial Club sites</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local newspaper(s)</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sky Sports online</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other social media channels</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
As we've seen across this section, fans search for accurate content and information from official Club sources. When we look at their motivations for using Club channels, it's clear to see why:
ticketing news - something that's rarely found anywhere else.

The other key reasons that fans use Club channels for is to keep up to date on fixtures and results, and match previews. It seems that fans have a preference for information directly from their Club on previous and upcoming games, rather than from elsewhere. This insight is also supported by the fact that fans use BBC Sport, local newspapers and unofficial Club sites less to gather their information.

The significance of this increases all the more when we look into the reasons why different fan groups use official Club channels. For instance, 46% of Championship Club supporters use their Club's official online store to buy merchandise. This is quite a bit more when compared to 40% of League One fans and 36% of League Two fans. This suggests that fans from these divisions are less likely to seek out merchandise for their Club online. Many of these fans are local, so could be heading to the Club shop to buy their kit.

Perhaps to be expected, younger fans are more likely to use their Club's digital channels for a wider range of reasons compared to older fans, particularly to purchase merchandise, to find streaming information and to read over player profiles.
CASE STUDY

WYCOMBE WANDERERS

As the survey results have indicated, supporters are keen to consume relevant and interesting content about their Clubs. Their favoured destination for such content is via their official Clubs’ channels, whether that’s through an official website, or across a variety of social media platforms. The challenge for Clubs is to not only keep their content updated but tailor it for different audiences across multiple channels.

We spoke to Wycombe Wanderers’ Head of Media & Marketing, Matt Cecil, about the importance of enhancing ongoing engagement and dialogue with supporters, via what is now a plethora of communication tools.

Good content is at the core of our marketing efforts to our supporters, and that means finding the balance between being entertaining, informative, accurate and engaging. Reacting to trends in society, or moods within our fanbase, mean we need to be quickly adaptable. And things don’t always go to plan; last season, one innocent tweet about a sold-out car park went viral and temporarily left us on the receiving end of some ridicule, but reacting in good grace and humour rescued a potentially tricky situation. We became the most followed League 1 club on TikTok, amidst some pretty tough competition, due to a series of well-judged, topical posts, and saw Instagram follower number sprint well past our Twitter tally by identifying which types of content were most relevant for the platform.

It’s always been important to recognise that website and social media content cannot just be a one-way mechanism to attempt to directly drive revenue by advertising ticketing, retail or hospitality opportunities. We are constantly building brand loyalty and attracting followers to our platforms through the use of diverse but consistently relevant and engaging articles, videos and posts, backed up by superb and powerful imagery. Our followers and readers enjoy personality and character from their football club - and we never lose sight of the fact that we work broadly in the entertainment industry."

“Matches are, perhaps obviously, where the majority of our content is created and consumed. The unpredictability of live sport, the challenges of busy schedules and the huge competition for our followers’ attention online mean we need to be at our best to encourage ticket or streaming sales, to share the news of the game and always maintain values of humility and good grace in victory and defeat. With that comes the need to feel empathy with our supporters and know what to say, how to say it, and when to say it. Sometimes, less is more.”

“Changing times, new platforms and the rollercoaster of on-field success and struggles mean that communication and content strategies are in regular need of review, but our talented team of creative minds are able to understand what will achieve the best results, through anecdotal reactions from fans and insights provided by various analytic tools. It’s great to know this is being recognised by our fans and we are thrilled to have them so closely engaged with the Club, both online and at matches, as it continues on its upward trajectory on and off the pitch.”

**GOOD CONTENT IS AT THE CORE OF OUR MARKETING EFFORTS TO OUR SUPPORTERS, AND THAT MEANS FINDING THE BALANCE BETWEEN BEING ENTERTAINING, INFORMATIVE, ACCURATE AND ENGAGING. REACTING TO TRENDS IN SOCIETY, OR MOODS WITHIN OUR FANBASE, MEAN WE NEED TO BE QUICKLY ADAPTABLE**

Matt Cecil,
Head of Media & Marketing
Which national newspaper do you usually read (on or offline) for information about your Club/Football news/EFL news?

What’s great is that Clubs have an opportunity to shape their own stories and communicate directly with fans through their own digital channels. We can also see that traditional media, both online and printed newspapers, is still a source of information for many fans.

In line with the 2019 survey, the Guardian remains the most read title online, with readership even increasing by 5%. Not to be outdone, the Daily Mail is the most read offline newspaper, replacing The Sun as the most popular offline choice among EFL fans.

Despite The Sun’s offline audience decreasing by 12% from the 2019 survey, the publications’ online EFL audience has grown by 8% in three years, showing us the shift to digital that many media businesses have made.

We’ve seen fans regularly head to BBC Sport, TV and social media to gain information about football. However, newspapers continue to be used by fans, despite their low use for Club specific news.

When breaking down by national and local newspapers, 17% of fans have told us they read national newspapers for their football news and 10% read local newspapers. For EFL specific news, this is slightly lower, with 16% using national and 8% using local. This tells us that for football news, it seems fans prefer coverage from national press, rather than local, which they head to for Club related news.

While we’ve seen that digital formats are more likely to be used more by younger fans, 47% of supporters who read national newspapers are over 65, showing the importance of newspapers for older fans.
Over half of fans who don’t attend games use EFL.com for fixtures/results and league tables (56% & 55%)

**ENGAGEMENT WITH THE EFL WEBSITE**

How frequently, if at all, do you use EFL.com? Which of the following do you use EFL.com for?

Even with a great range of content and information available to fans, the EFL website isn’t used frequently by most supporters, who instead prefer to use Club Channels. Despite this, 45% of fans have told us they’ve used EFL.com at some point, with 21% using the site once a month or more. Added to this, 25% of League Two Club fans use the site once a month or more, compared to 19% of Championship Club fans.

**PROPORTION OF FANS WHO USE EFL.COM ONCE A MONTH OR MORE**

<table>
<thead>
<tr>
<th>Channel</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sky Bet</td>
<td>19%</td>
</tr>
<tr>
<td>Sky Bet</td>
<td>22%</td>
</tr>
<tr>
<td>Sky Bet</td>
<td>25%</td>
</tr>
</tbody>
</table>

When asked why supporters use EFL.com, fans told us they mostly use it to read about fixtures and results information, and league tables. What’s interesting here is that those who don’t attend games were more likely to head to EFL.com for information on fixtures or results and league tables. This really does highlight just how important ease of navigation and captivating content is for the EFL website to excite new fans.

**GENERAL USE OF EFL.COM:**

- **21%** use EFL.com once a month or more
- **55%** use EFL.com one or more times a year
- **6%** use EFL.com once a week
- **5%** use EFL.com more than once a week
- **6%** use EFL.com less often
- **5%** never use EFL.com

**USES OF EFL.COM:**

- Fixtures and results information: 45%
- League tables: 40%
- Key competition dates: 34%
- Latest TV announcements: 16%
- Match previews: 16%
- Post-match round-ups: 15%
- Streaming information: 13%
- EFL regulations: 6%
- EFL campaigns & projects: 11%
ENCOURAGING FANS TO USE THE EFL WEBSITE

Thinking about the content available on EFL.com, which of the following, if any, would make you visit the website more often?

We asked fans what types of website content they are interested in, to understand what would cause them to use EFL.com more frequently.

It appears that 29% of EFL fans are data and detail orientated when it comes to football, with the option to browse statistics likely to increase traffic to EFL.com the most. The insight and entertainment that some fans want to be able to gain from the EFL website isn’t just from content for the current season, with 23% enjoying the thought of accessing the rich history of matches played in the EFL, which date back to 1888.

From past and present to the future, the digitisation of sport means that fans are growing used to, and enjoying, gamified content and products. Interestingly, an EFL fantasy league appears to be a fantastic way to engage younger fans, as 43% of under 35s would be encouraged to use EFL.com, given the introduction of an EFL fantasy league.

USES OF EFL.COM:

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statistics and data on EFL</td>
<td>29%</td>
</tr>
<tr>
<td>Historical archive of matches and records</td>
<td>23%</td>
</tr>
<tr>
<td>More exclusive video features</td>
<td>18%</td>
</tr>
<tr>
<td>An EFL fantasy league</td>
<td>16%</td>
</tr>
<tr>
<td>Regular competitions</td>
<td>12%</td>
</tr>
<tr>
<td>An FAQ section on popular topics for fans</td>
<td>9%</td>
</tr>
<tr>
<td>Information regarding EDI</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

Content and communication played a huge part in the football experiences of EFL fans during the 2021/22 season, whether that was inside or outside of a matchday.

The fans told us they want trusted and official content as well as local coverage from their Club, whether that’s through official social media and website channels, or from local radio and newspapers.

It seems there’s room for improvement too. Accessing digital content on a matchday is still difficult for a lot of fans, although it’s improved from the 2019 survey. Fans want to have a range of ways to engage with their team online, before, during and after the match. Being able to access content at the ground with ease is the next step towards driving matchday satisfaction even further.

What’s also interesting is there seems to be variations in the sources and types of content that different people engage with. This indicates that a one-size-fits-all approach to enriching fan relationships with content and communication is perhaps not the most effective strategy. Clearly different groups of supporters have varying preferences to how they wish to consume Club content, and this is particularly true around matchdays and the different channels used.
OVERVIEW

Sports fans, and particularly football fans, now have a variety of ways to watch their Club on TV or on live streams, including the likes of Sky Sports, (including Red Button service), via TV highlights and Club streaming services. We’ve learnt some interesting facts from fans and over the course of this section, we’ll dive into fans’ perceptions of subscription services and how they feel when their Club is selected for live coverage. We’ll also look at the levels of engagement with these services, and if there’s anything that would persuade fans to choose to live stream over going to watch their team play. Stay tuned.
WHAT THE FANS HAVE TOLD US

Fans have access to more subscription services than ever with Sky Sports, the EFL’s principal broadcast partner, remaining the most subscribed. We found that opinion on the range of these options is split, but on the whole, fans are positive about their EFL Club being broadcast to the nation despite any impact on kick-off time this may have. iFollow (and Club Streaming generally) is still a popular service for so many supporters, giving fans the chance to be closer to their Clubs when there are barriers to stop them being there in person.

SUBSCRIPTION SERVICES

Which of the following services do you currently subscribe or have access to (either through a TV provider’s package or directly)?

When we asked fans what broadcasting services they’re currently subscribed to, Sky Sports, the EFL broadcaster, was most popular. Interestingly, subscription rate varies greatly, with 64% of Championship Club fans telling us they have a Sky Sports subscription, compared to 57% and 55% of League One and Two fans, respectively.

When we look back and compare this to the 2019 survey, nearly all subscriptions have gone up. Netflix has increased by 14% and access to Amazon Prime has surpassed BT Sport, increasing by 27%. An additional platform that offers flexibility and EFL coverage is NowTV, which EFL fans are using more than ever; subscription and access to Now TV is 2% higher than in 2019.

BROADCASTING SERVICES CURRENTLY SUBSCRIBED TO:

- Sky Sports: 60%
- Netflix: 58%
- Amazon Prime: 57%
- BT Sport: 42%
- Eurosport: 23%
- NowTV: 13%
- None of these: 12%

Amazon Prime is now higher than BT Sport, increasing by 27% since 2019.
Which of the following statements best describes your view on subscriptions to football coverage?

Fans have a lot of choice when it comes to ways of watching football on-screen, however, opinion is split on whether the number of subscriptions available are a good thing. Just over a third believe the range of subscriptions is positive, while slightly more fans see it as a negative, with the rest unsure. Perhaps to be expected, younger audiences are significantly more positive towards the variety of subscription options at their disposal, compared to older fans.

### Positivity Towards Subscription Options:

- **I think the choice of multiple subscriptions is positive for football supporters**: 36%
- **I do not think it is positive for football supporters**: 27%
- **Unsure**: 35%

42% of under 35s are positive about the choice vs 34% of over 35s.
ATTITUDES TO CLUB TV COVERAGE

How do you feel when your Club is selected for live TV coverage?

Even though there's a range of viewing subscriptions on offer for fans, when it comes to their team being chosen for live TV coverage, supporters across all Leagues are generally positive.

FEELING WHEN TEAM IS SELECTED FOR TV COVERAGE:

- I attend the match and like the coverage the Club gets: 53%
- I like it, it's a chance to watch my Club's matches: 34%
- I don't mind but I think it impacts negatively on the match attendance: 21%
- It often means the match is rearranged for a date I can't attend: 15%
- It usually disrupts my matchday routine: 14%
- I think my Club is selected too frequently: 6%
- Other: 5%

What's interesting is that fans of League One and League Two Clubs tend to be more positive about their Club being chosen for TV coverage, while Championship Club supporters claim they are more likely to struggle to attend fixtures rescheduled due to TV coverage. This is unsurprising, with Championship fixtures selected most often for broadcast coverage under the rights agreement.
**ENGAGEMENT WITH SUBSCRIPTIONS**

### FEELINGS TOWARD LIVE TV COVERAGE

*How do you feel when your Club is selected for live TV coverage?*

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sky Sports</td>
<td>60%</td>
</tr>
<tr>
<td>NowTV</td>
<td>13%</td>
</tr>
<tr>
<td>BT Sport</td>
<td>43%</td>
</tr>
<tr>
<td>Sky Sports and BT Sport</td>
<td>68%</td>
</tr>
<tr>
<td>BT Sport and NowTV</td>
<td>48%</td>
</tr>
<tr>
<td>BT Sport, Sky Sports and Prime subscription</td>
<td>81%</td>
</tr>
</tbody>
</table>

When the pandemic struck, Club Streaming and the Sky Sports Red Button service provided a lifeline for fans as they could watch their team from home, when stadium seats were off limits. We found that a significant number of fans engaged in both services, which not only benefitted supporters, but in the case of Club Streaming, helped to raise in excess of £40 million for EFL Clubs at a crucial time.

**£40 million**

Club Streaming during the pandemic helped to raise in excess of £40 million for EFL Clubs.

### USING THE RED BUTTON

*Have you accessed the Sky Sports 'Red Button' service to watch live midweek Championship matches?*

Since August 2018, fans who are also Sky TV or Now TV customers have been able to watch midweek Championship games not picked for broadcast on one of the main Sky Sports channels via the Red Button feature. When we asked fans whether they have used the service, **65%** told us that they’d watched Sky Bet Championship matches on the Red Button.

### RED BUTTON AND ATTENDANCE AT A HOME MATCH:

**65%**

Of all fans

**84%**

Of Championship fans

have accessed the Sky Sports Red Button service to watch live midweek Sky Bet Championship matches.
ENGAGEMENT WITH iFOLLOW

Which of the following subscriptions to iFollow or your Club’s streaming service have you previously purchased or currently have?

In total, 50% of EFL fans who completed the survey and are based in the UK have engaged with iFollow across video or audio, with the majority purchasing a video match pass to watch their team. In comparison, international fans were more likely to be iFollow subscribers, with 35% committing to an annual or half-season live video subscription, highlighting just how important streaming services are to keeping international fans connected to their Club.

We also unearthed some interesting insights when analysing fans and their usage of Club Streaming in more detail. For instance, League Two Club fans are the most likely to engage with the streaming service, while international League One Club fans are more likely to subscribe to iFollow than international supporters of Clubs playing in the Championship or League Two.

UK FANS:

- Live video match pass: 46%
- Monthly audio subscriptions: 5%
- Annual audio subscriptions: 5%
- None of these – I am not currently a subscriber: 50%

UK iFOLLOW SUBSCRIBERS BY DIVISION:

- European Champions League: 45%
- European League One: 64%
- European League Two: 67%

International fans: 35%

Annual / Half-season live video subscription

Live video match pass

Monthly live video subscription

None of these – I am not currently a subscriber

66% 70% 63%

PROPORTION OF INTERNATIONAL FANS WHO SUBSCRIBE TO iFOLLOW ACROSS EFL DIVISIONS:

INTERNATIONAL FANS: 67%

of international fans have/had an iFollow subscription

50% of UK fans have/had an iFollow subscription
ENGAGEMENT WITH iFOLLOW

When you watch iFollow or your Club’s streaming service – who do you usually watch with?

Just like it is with live football attendance, streaming the action on iFollow is a social experience for many fans. 41% of fans watch with at least one other person, and a further 9% sometimes watch with other people.

When we look at who the biggest social streamers are, younger fans came out on top, as they’re more likely to watch with family and friends, while older fans are more likely to watch alone. It would seem that the streaming viewing experience varies for different fan demographics.

**iFOLLOW WATCHING COMPANION:**

- **49% of under 35s watch with a wider group vs 8% of over 35s**
- **52% of over 35s watch alone vs 37% of under 35s**

[Chart showing breakdown of viewing companions by age group.]
CASE STUDY

CAMBRIDGE UNITED

At Cambridge United, they are making the most of their Club Streaming service to bring match footage and Club content to fans across the world. Having aimed to develop and enhance their content and delivery during the pandemic, they’re now reaping the rewards with a growing number of keen followers regularly tuning in for their audio and video services.

United’s Head of Communications, Dan Branowsky, talks us through how their investment in the service has created an enjoyable product for their supporters.

“First and foremost, we view our Club Streaming product as an extremely important tool to connect with our supporters. We know that our fanbase is much larger than our just the regular match-going fans and therefore, Club Streaming is a crucial asset to stay connected with our wider base of fans domestically and abroad.”

“Whenever a game is available for streaming, we ensure that our supporters are aware and promote the product across our website, social media channels and via our email database. Whenever there’s an opportunity to stream a game, we take it. Occasionally, we’ve had the option not to stream a match, like when a game has been moved from a Saturday to a Tuesday, and while some Clubs may take this option due to a fear of the stream impacting ticket sales, we don’t view it in this way. Instead, we see it as an opportunity to get more fan eyeballs onto the team, and ultimately the chance for more Cambridge United fans to be able to watch their Club.”

“One of the key reasons for our success is due to the team’s on-pitch performance and promotion into League One during the behind-closed-doors season. With no supporters in the ground, we invested in our online coverage with premium video content to supplement the live stream and this, in addition to the team’s extraordinary performances throughout the season, led to huge audiences for a Club of our size.”

“We have been able to ride this positive momentum into our League One season and retain the enthusiasm behind our iFollow coverage, led by our dedicated and fanatical commentators, who have been commentating on Cambridge United games for a number of decades.”

“We have seen unprecedented visible growth in our overseas fanbase, with people from 172 countries visiting Cambridge-United.co.uk over the past year. The financial benefits are extremely important to the Club with record revenue coming in via EFL Digital across the past two seasons. Importantly though, it remains a key tool for the Club to connect to as many fans as possible, and we’re looking forward to being able to continue to bring them high quality coverage of games going forward.”

Dan Branowsky,
Head of Communications

71% of Cambridge United fans in the UK have used a live video match pass
The average proportion of fans of an EFL Club who have used a Live Video Match Pass is 46%

IT REMAINS A KEY TOOL FOR THE CLUB TO CONNECT TO AS MANY FANS AS POSSIBLE, AND WE’RE LOOKING FORWARD TO BEING ABLE TO CONTINUE TO BRING THEM HIGH QUALITY COVERAGE OF GAMES GOING FORWARD.
INCREASING USAGE

ENGAGEMENT WITH iFOLLOW/STREAMING SERVICE
What would make you buy iFollow or your Club’s streaming service video passes more regularly?

Around one in three fans told us that increasing the number of fixtures and the reliability of the stream were the main drivers of propensity to purchase an iFollow pass or subscription, with improved production coming in a close third.

FACTORS THAT WOULD INCREASE iFOLLOW PURCHASING MORE REGULARLY:

RATING OF iFOLLOW/STREAMING SERVICE
How would you rate the iFollow or your Club’s streaming service/product, on a scale of 1 to 5 where 1=very poor and 5=very good?

With the EFL continuously developing its services to give fans the best possible streaming experience to bring them closer to their Club, it’s great to hear that 57% rated the service as good or very good. Added to this, 73% of international fans rated the service positively too, which is an encouraging statistic given the importance of streaming to the relationship with their Club.

RATING OF iFOLLOW:

5 – very good
4
3 – neutral
2
1 – very poor
LIVE STREAM VS LIVE ATTENDANCE

Although many EFL supporters use streaming and the Sky Sports Red Button, it’s clear that fans still prefer the live football experience. In fact, the majority of them told us that even with the variety of streaming options, it doesn’t impact their attendance.

Let’s explore the data in more detail.

ENGAGEMENT WITH IFOLLOW

When thinking about going to a home match, does the ability to watch matches via via the Sky Sports ‘Red Button’ impact on your decision to purchase a ticket to attend the game?

EFL Clubs will be pleased to hear that 81% of fans said that if their team was chosen for the Sky Sports Red Button service, it wouldn’t impact their attendance, and that they would still be in the crowd for as many home fixtures as possible. In fact, the number of supporters saying this has increased by 8% since 2019, telling us that the live stadium experience has a bigger pull for fans than ever.

Of lapsed season ticket holders, a significant 61% stated that their attendance would not be impacted by the red button service compared to 73% of those who never held a season ticket.

81% stated that they would still attend as many home games as they can.

Which of the following scenarios, if any, would make you select to live stream a game instead of attending?

Almost a third of fans told us that nothing would make them choose to stream a live fixture rather than attending a match. As we’ve seen through this section already, it seems that watching their EFL Club from a stadium seat is still really important for so many fans.

Again continuing a matchday theme, travel time and distance to away fixtures are two of the main barriers to attendance for supporters, so it’s unsurprising that 47% are motivated to stream when a long journey is on the cards. It’s why promoting streaming and driving awareness ahead of away fixtures is vital to getting fans to watch their Club, who otherwise wouldn’t.

FACTORS THAT WOULD INFLUENCE FANS’ DECISION TO LIVE STREAM OVER ATTEND

- Travel distance
  - 47%
- Nothing
  - 31%
- The convenience of watching at home
  - 23%
- Weather
  - 16%
- To assist with caring commitments
  - 10%
- If it’s cheaper than buying a ticket to attend the match
  - 10%
- I can watch a live stream with my friends / family
  - 8%
- Other
  - 5%
LET’S ROUND UP

It seems fans are paying for subscriptions more than ever amidst a rapidly evolving broadcast landscape. This is in part driven by the range of options available to fans, which they have mixed feelings about. The majority of supporters do seem to agree that being chosen for TV coverage is generally a positive for them and their Clubs, although there is slightly more negativity from Championship supporters.

Live streaming is still an important option for fans, particularly for international supporters and when there’s significant travel time for away fixtures. It’s why it’s great to hear that more than half are positive about the service that streaming provides.

While there are similarities in who supporters like to watch the live action with, regardless of whether it is from home or at the stadium, a huge number of them would still attend live matches rather than live stream. In short, streaming is an essential option for fans, but nothing beats the live stadium experience.
OVERVIEW

Over the following pages, we’ll explore just how important the excitement of EFL matches and competitions are to fans, with a focus on the Carabao Cup and Papa Johns Trophy. We’ll also discover how many games in each competition fans try to attend. Where they don’t attend, we’ll look into the core reasons. All of this aims to give us a greater understanding of what fans really think of the competitions and how the EFL and its Clubs can encourage more supporters to attend in the future.
WHAT THE FANS HAVE TOLD US

It’s great to see that fans continue to have a thirst for EFL competitions, with nearly all supporters telling us EFL matches are a source of excitement, whether they watch in person, on TV or via streaming. Another significant positive for EFL competitions, specifically the Carabao Cup and Papa Johns Trophy, is the number of fans attempting to attend all games – with over 30% experiencing Papa Johns Trophy matches, and over 50% attending Carabao Cup games.

EFL MATCHES

EXCITEMENT FROM WATCHING EFL MATCHES

To what extent do you agree with the following statement, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

A real positive for the EFL and its Clubs is that 87% of fans are excited by EFL matches no matter how they watch them. This belief is widely held by fans across every league of the EFL and helps to explain why appetite for EFL football continues to grow.

WATCHING EFL MATCHES - BE IT IN PERSON, ON TELEVISION OR VIA STREAMING - IS EXCITING

53% 34% 11%
5 – strongly agree 4 3 – neutral 2 1 – strongly disagree

COMPETITION ATTENDANCE

In which of the following competitions have you attended games this season? N=32,812

EFL LEAGUE MATCH ATTENDANCE:

- Sky Bet Championship 47% - Sky Bet League One 37% - Sky Bet League Two 20%

CUP COMPETITION ATTENDANCE:

- Carabao Cup 39% - Papa Johns Trophy 22% - EFL 35%

To what extent do you agree with the following statement, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree? n=30,031

In which of the following competitions have you attended games this season? N=32,812
EFL CUP COMPETITIONS

EXCITEMENT FROM WATCHING EFL MATCHES

EFL Clubs had a standout year in the Carabao Cup, one of the EFL’s showpiece competitions, with Sunderland beating Queens Park Rangers on penalties to reach the Quarter-Finals, and four EFL Clubs making it to the last 16.

Sutton United and Rotherham United reached the Papa Johns Trophy Final at Wembley Stadium back in April 2022, a competition created to give fans the opportunity to watch their Club in a major Final, with Rotherham coming out on top.

With the Carabao Cup and the Papa Johns Trophy an integral part of the EFL product, we asked fans about their thoughts towards these two football competitions and the excitement they generate.

CARABAO CUP

CARABAO CUP ATTENDANCE
Which of the following best describes your attendance of the Carabao Cup?

On the whole, fans showed a strong backing for their team in the Carabao Cup. 53% of fans told us they’d attempted to attend all their Club’s games in the competition, although 23% said they didn’t try to attend at all.

We found that Sky Bet League Two fans are the most likely to attend Carabao Cup games, despite only two Clubs from that division making it to Round Three of the competition in 2021/22. This perhaps indicates the value these supporters place on Carabao Cup progress, and the potential of facing higher-profile Clubs from higher divisions.

ATTENDING ALL GAMES BY LEAGUE:

| PROPORTION WHO ATTEND ALL CARABAO CUP GAMES: |
| SEASON TICKET HOLDERS | 63% |
| LAPSED SEASON TICKET HOLDERS | 39% |
| NON-SEASON TICKET HOLDERS | 38% |

When we looked at the results by season ticket holder status, we found that loyal league match attendance also translated to the Carabao Cup Games, with 63% of holders trying to attend all Carabao Cup fixtures.

ATTENDANCE AT CARABAO CUP GAMES:

- Attempt to attend all games: 53%
- Only attend games at latter stages: 22%
- Only attend the final: 3%
- I do not attend: 23%

Which of the following best describes your attendance of the Carabao Cup? n=28,895
REASONS FOR NOT ATTENDING

What are your main reasons for not attending Carabao Cup games?

Similar to EFL League competitions, Carabao Cup midweek matches present a challenge for some fans to attend. But the good news is that the number of fans put off by midweek fixtures is down by 9% since the 2019 survey. This may be explained by the increased flexibility many supporters have in their professional life and work patterns since the pandemic.

The second most common reason for fans not attending is that they don’t believe their Club prioritises the competition. This perception becomes even more prominent among Championship and League One Club fans, compared to League Two Club supporters. Another positive for the EFL is that the overall number of fans that believe this is 5% less than the 2019 survey, telling us that more fans see their Club approaching the Carabao Cup to progress, and even win it.

FACTORS THAT INFLUENCE DECISION TO ATTEND CARABAO CUP MATCHES:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s difficult for me to attend midweek fixtures</td>
<td>32%</td>
</tr>
<tr>
<td>It is not a priority for my club</td>
<td>29%</td>
</tr>
<tr>
<td>The cost of attending</td>
<td>22%</td>
</tr>
<tr>
<td>Not interested in the result</td>
<td>20%</td>
</tr>
<tr>
<td>I don’t have the time</td>
<td>15%</td>
</tr>
<tr>
<td>I prefer to watch on TV</td>
<td>8%</td>
</tr>
<tr>
<td>Poor quality opponents</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
</tbody>
</table>

Fewer supporters find it difficult to attend fixtures

41% in 2019  →  32% in 2022

CARABAO CUP IS NOT A PRIORITY FOR THEIR CLUB:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 35s</td>
<td>32%</td>
</tr>
<tr>
<td>Under 35s</td>
<td>29%</td>
</tr>
</tbody>
</table>

43% of over 35s say the Carabao Cup is important to them

(vs 34% of under 35s)
**PAPA JOHNS TROPHY**

**REASONS FOR NOT ATTENDING & IMPORTANCE OF PROGRESSION**

What are your main reasons for not attending Papa Johns Trophy games?

How important do you rate your Club’s progress in the Papa Johns Trophy, on a scale of 1 to 5 where 1=not at all important and 5=very important?

37% of fans told us they don’t attend Papa Johns Trophy matches, the two biggest reasons for this is that they’re not as interested in the result, or they don’t really see it as a priority for their Club.

As expected, most of the fans who don’t attend Papa Johns fixtures also said progress in the competition isn’t important. But the good news is that 61% of supporters either said that it was important or were neutral in their position.

When we look at the figures by age, we find that over 35s are likely to view progress in the competition as more important than under 35s - all of which were not born in 1983, the first year of the competition.

Perhaps to be expected, fans of 2021/22 finalists Rotherham United and Sutton United were most likely to rate progress in the competition to be more important to them. This is significant when we consider the average of importance is 35% for Sky Bet League One and Two.

**ATTENDANCE AT PAPA JOHNS TROPHY MATCHES:**

Like the Carabao Cup, fan attendance habits for Papa Johns Trophy games are looking up. Over 30% try to attend all Papa Johns Trophy games, whilst the number of fans who don’t attend any Papa Johns Trophy games at all is down significantly by 26% since 2019. This tells us that supporters believe the competition to be increasingly important, and the passion to attend live games after the pandemic is strong.

**REASONS WHY THEY DO NOT ATTEND PAPA JOHNS TROPHY MATCHES:**

Which of the following best describes your attendance of the Papa Johns Trophy? n=16,261

- I try to attend all games 35%
- I only attend games if my club gets past the group stage 17%
- I don’t attend Papa Johns Trophy games 11%
- I’m only interested in attending if we reach the Final 37%

**Fans who do not attend Papa Johns Trophy matches**

- 63% in 2019 → 37% in 2022
**IMPORTANCE OF PROGRESS IN PAPA JOHNS TROPHY:**

<table>
<thead>
<tr>
<th></th>
<th>5 - very important</th>
<th>4</th>
<th>3 - neutral</th>
<th>2</th>
<th>1 - not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td></td>
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<tr>
<td>19%</td>
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<tr>
<td>26%</td>
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<tr>
<td>13%</td>
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<tr>
<td>25%</td>
<td></td>
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</tbody>
</table>

**IMPORTANCE OF PROGRESS BY DIVISION:**

<table>
<thead>
<tr>
<th>Club</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotherham United</td>
<td>64%</td>
</tr>
<tr>
<td>Sutton United</td>
<td>88%</td>
</tr>
</tbody>
</table>

**MAIN BENEFITS TO CLUBS**

What do you consider to be the main benefits of your Club participating in the Papa Johns Trophy?

It's clear that fans see a lot of benefits in taking part in the Papa Johns Trophy, while the number of supporters seeing no benefits is down by 8% since the 2019 survey. The most recognised benefit by fans is the opportunity to reach a Final at Wembley Stadium, an exciting occasion that 30,688 fans of Sutton United and Rotherham United experienced this season.

Two other significant factors for fans were the opportunities the competitions provide for their Club's younger or wider squad players and to see an uplift in revenue for their Club. These responses, and the increase in those fans saying they would attend games indicates a growing awareness of the benefits the Trophy competition can provide.

**BENEFITS OF THE PAPA JOHNS TROPHY:**

- The opportunity to reach a Wembley Final: 58%
- The opportunity to see my Club's younger/squad players: 43%
- The opportunity for my Club to generate increased revenue: 41%
- The opportunity to play against teams we don't meet in the League: 31%
- My Club test themselves against the best young players in the UK: 24%
- I do not think there are benefits to participating: 17%

**Those not seeing any benefits down from**

26% in 2019  →  17% in 2022

36% of over 35s say the Papa Johns Trophy is important to them (vs 29% of under 35s)
Throughout this chapter the results have told us that overall fans view EFL competitions as exciting, regardless of whether they watch in person, via broadcast or streaming. Looking at Cup competition attendances, the number of fans who told us they didn’t attend dropped in comparison to 2019, which tells us that interest in the competitions is on the rise.

For many supporters a good Cup run is a fantastic opportunity for their Club to progress to later rounds and test themselves against high-profile opposition. This is particularly true for fans of League Two Clubs, who clearly look forward to seeing their team compete against Clubs from a higher division. In the Papa Johns Trophy, many fans see progress in the competition to be important. This insight was especially true of Sutton United and Rotherham United followers, with the competition offering them the chance to watch their Club in a Final. Fans also expressed a keen interest in seeing young squad players get a chance to perform in Papa Johns Trophy matches, viewing the competition as the perfect opportunity for them to develop.

However, fans also told us some of the challenges they face when attending matches more often. Some believe Cup matches are not a priority for their Club, while others highlight the cost of tickets as a barrier, particularly for the Carabao Cup.

On the whole though, fans are really engaging with all EFL competitions, and clearly see the potential benefits from Cup progress and the extra benefits that brings.
THE EFL, POLICIES & PERCEPTIONS

OVERVIEW

Here we’ll explore what fans see as the function of the EFL and the role it plays. We also take a look at the importance of Club developed players and on other matters such as attitudes towards gambling. Some interesting facts emerge that we’ll share in the coming pages. We’ll also reflect on the current and future focuses for the EFL based on what fans say is important to them such as safe standing, environmental sustainability, and ensuring accessibility for all supporters.

% of fans saying that they would welcome the introduction of an Independent Regulator
WHAT THE RESULTS TELL US

Although fans see some of the main functions of the EFL as being administrative and regulatory, they also believe that the EFL is here to create exciting competition for supporters. From one topic to the next, fans are encouraged by their Club’s success in cultivating young players, while gambling habits are shifting. We’ve also seen that environmental sustainability, the opportunity to stand at matches and an independent regulator are important areas of development for fans.

ROLE OF THE EFL

VIEWS ON THE ROLE OF THE EFL

When thinking about the main function of the EFL, to what extent do you agree or disagree with the following statements, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

Since its formation in 1888, administering and regulating the EFL, its Clubs and League Cup competitions has been at the core of the EFL’s purpose.

As well as upholding competition rules and guiding Clubs, the majority of fans agree that the EFL has a role to play in developing home grown talent, cultivating domestic fanbases and diversifying the game. In comparison to 2019, more fans believe that the EFL should ensure that all competitions are entertaining and that the League format is sustainable and profitable.

ROLE OF THE EFL IS TO...

...uphold competition rules and regulations effectively

Agree: 83%
Neutral: 12%
Disagree: 6%

...ensure its competitions remain engaging, accessible and enjoyable

Agree: 81%
Neutral: 13%
Disagree: 6%

...ensure a sustainable and profitable league

Agree: 78%
Neutral: 15%
Disagree: 7%

...support growth of attendances across all EFL Clubs

Agree: 72%
Neutral: 20%
Disagree: 8%

...develop young players through the academy system and create first team playing opportunities

Agree: 71%
Neutral: 18%
Disagree: 11%

...grow and cultivate Club fanbases domestically

Agree: 62%
Neutral: 25%
Disagree: 13%

...help diversify the game

Agree: 58%
Neutral: 29%
Disagree: 13%
PERCEPTION OF THE EFL

HOW FANS FEEL ABOUT THE EFL
To what extent do you agree or disagree with each of the following statements, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

While many fans agreed that the role of the EFL is to uphold and administer competitions and regulations, it’s really positive to see that 44% of them agree that the EFL is doing a good job of this. That’s actually a 7% increase from the 2019 survey. Generally, fans slightly agreed more than disagreed with the statements listed below which is encouraging, but without consensus it means that there’s still work to be done.

### PERCEPTION OF THE EFL:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does a good job in administering its Competitions</td>
<td>44%</td>
<td>38%</td>
<td>18%</td>
</tr>
<tr>
<td>Helps promote inclusivity within the game</td>
<td>44%</td>
<td>42%</td>
<td>14%</td>
</tr>
<tr>
<td>Upholds competition rules and ensures all Clubs operate within regulations effectively</td>
<td>43%</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Helps promote accessibility within the game</td>
<td>41%</td>
<td>44%</td>
<td>15%</td>
</tr>
<tr>
<td>Is an important influencer in the development of the game in England &amp; Wales</td>
<td>38%</td>
<td>41%</td>
<td>21%</td>
</tr>
<tr>
<td>Lives up to its heritage as the world’s oldest football league competition</td>
<td>37%</td>
<td>39%</td>
<td>24%</td>
</tr>
<tr>
<td>Helps its Clubs to make a positive impact in their communities</td>
<td>34%</td>
<td>45%</td>
<td>21%</td>
</tr>
<tr>
<td>Plays a key role in working to establish fair representation of coaches or managers</td>
<td>31%</td>
<td>48%</td>
<td>21%</td>
</tr>
</tbody>
</table>

To what extent do you agree or disagree with each of the following statements, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

**Importance of the production of home grown players:**

- **69%** agree that their Club is helping to develop future home grown players.
- **23%** neutral.
- **6%** disagree.

To what extent do you agree or disagree with each of the following statements about your Club, on a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree?

Producing and developing young talent is important to nearly all fans, and more so than ever before, with 92% of fans telling us it’s important that their Club helps produce the next generation of footballers, up 6% on 2019. When we compare this to how successfully fans think their Club is doing this, we found that 75% of them agreed that their Club is helping to develop future home grown players, with only 8% saying that they’re not. This is positive news for all EFL Clubs.

My Club is helping to develop future home-grown players

- **75%** agree.
- **17%** neutral.
- **8%** disagree.

92% of fans told us it’s important that their Club helps produce the next generation of footballers (up 6% on 2019)
Producing Club Developed Players is not only important to the vast majority of fans, most also think their Club is good at it.

And it is easy to see why, with EFL Clubs at the heart of producing the next generation of footballers.

In the 2020/21 season, EFL Clubs gave 203 senior debuts to players produced across their academies - that’s more than 200 new, young players coming into the professional game through the EFL, and an increase on the two seasons before.

The development of youngsters is nothing new, with the legacy being felt across recent seasons. Last season, for instance, Club Developed Players were named on a team sheet 8,489 times across the EFL’s three divisions - that’s the second highest across the last six seasons, with 2020/21 seeing Club Developed players featuring on teamsheets 9,609 times.

All told, 81% of teamsheets entered on match days across the 2021/22 EFL season featured at least one Club Developed Player, meaning the majority of games watched last season would have featured a player developed in the EFL. The Championship led the way, with 89% of teamsheets in the division last season featuring a Club Developed Player and 78% featuring at least two Club Developed Players.

The Papa Johns Trophy also continues to contribute to youth development, with 16 invited teams from the Premier League and Championship using the competition to give senior experience to their academy players.

The importance of Clubs’ roles in developing players is regularly felt by the England national team, with 23 of Gareth Southgate’s provisional England squad for last summer’s Euros having gained experience in the EFL.

And when Southgate named his squad for World Cup Qualifiers in September last year, all 25 players had been ‘Raised in the EFL’, meaning they either played in the EFL, progressed through an EFL Academy or made their debut in an EFL competition.

So there is certain to be the fingerprint of EFL Clubs on the Three Lions line-up when they head to the 2022 World Cup in Qatar this winter.
GAMBLING IN FOOTBALL

OPINION ON GAMBLING COMPANIES SPONSORSHIP IN FOOTBALL
Do you believe that sponsorship of football by gambling companies is...

Football has had a long-standing relationship with the gambling industry, and many supporters enjoy responsibly placing a bet as part of their matchday experience. Equally we recognise that the promotion of gambling by sport remains a contentious issue with the Government currently reviewing the Gambling Act 2005.

57% of supporters view commercial partnerships between gambling companies and football stakeholders as acceptable. Responsible betting is central to the Sky Bet and EFL partnership, therefore it is positive that 51% of supporters believe that, with suitable safeguards to protect young people and those vulnerable to gambling, it’s acceptable.

OPINION ON GAMBLING COMPANIES SPONSORSHIP IN FOOTBALL:

- Acceptable with suitable safeguards to protect the young and problem gamblers: 51%
- Not acceptable in any circumstances: 6%
- Acceptable in all circumstances: 6%
- I don’t know: 36%

FREQUENCY OF BETTING
How frequently have you placed a football bet online in the last 12 months?

What does stand out is that the majority of supporters don’t place bets online. Added to this, it seems that the number of fans who’ve not placed an online bet in the last 12 months is 8% greater than when we asked supporters in 2019.

The number of fans who gamble online more than once in a week is also down, indicating that supporters are betting slightly less frequently. And for those fans who do bet, a number of them seem to do it once a week on average.

FREQUENCY OF ONLINE BETTING IN THE LAST 12 MONTHS:

- Every day / most days: 2%
- A few times a week: 6%
- About once per week: 10%
- About once a fortnight: 4%
- About once a month: 4%
- Every couple of months: 3%
- A few times a year: 6%
- Once in the last 12 months: 3%
- No bet placed online in the last 12 months: 62%

Increase in those who have not placed a bet in the last 12 months compared to 2019: 8%
FINANCIAL SUSTAINABILITY

IMPORTANCE OF FINANCIAL SUSTAINABILITY
How important is it to you that football clubs are financially sustainable in the long term?
How concerned are you about the financial imbalance between Premier League and the EFL?
To what extent do you believe that parachute payments distort fair competition between those clubs in the Championship (and occasionally in League One/Two) that are receiving such payments and those that are not?

From the data we’ve received from fans, there’s an almost unanimous consensus among fans that their Club’s financial sustainability is important to them. In addition to this, there’s also widespread concern when it comes to financial distribution in English football, with 87% of fans worried about the financial disparity between the Premier League and the EFL.

Added to this, 69% of fans agree that parachute payments are distorting fair competition in English football – these payments are provided to Clubs relegated from the Premier League to assist them in managing a reduction in income.

It seems to be very clear that fans support the view that English football would benefit from a change to the current financial distribution model, in order to seek to achieve greater financial fairness and sustainability across the football pyramid.

CONCERN ABOUT FINANCIAL IMBALANCE BETWEEN PREMIER LEAGUE AND EFL:

EXTENT PARACHUTE PAYMENTS DISTORT FAIR COMPETITION:
**SUPPORT FOR AN INDEPENDENT REGULATOR**

**IMPORTANCE OF ISSUES**

How important to you are each of the following issues, on a scale of 1 to 5 where 1=not at all important and 5=very important?

As we look ahead to the future of football and the EFL, we asked fans what areas are important to them. The EFL’s sustainability strategy in the coming years is clearly high on the agenda, with 53% of fans telling us they’d like the EFL and its Clubs to operate more environmentally friendly and sustainably.

The second issue raised was around safe standing, with 51% of fans telling us that it is important that all Clubs offer it. As we’ve touched on throughout this report, diversity in football is another key topic and a central goal for the EFL, so it’s good to see that only 25% of supporters said that it isn’t important to them.

**IMPORTANCE THAT...**

- **the EFL operate more environmentally sustainably**: 53% Important, 31% Neutral, 15% Not at all important
- **all Clubs can offer standing**: 51% Important, 23% Neutral, 26% Not at all important
- **the game tackles the under-representation of BAME coaches**: 41% Important, 35% Neutral, 24% Not at all important
- **the game tackles the under-representation of BAME fans**: 39% Important, 36% Neutral, 26% Not at all important
- **supporters are able to consume alcohol in sight of the pitch**: 23% Important, 23% Neutral, 54% Not at all important

**INDEPENDENT REGULATOR**

To what degree would you support the introduction, by the Government, of an independent regulator with powers to address the distribution of money in football in order to ensure the sustainability of Clubs and deliver fair competition between them?

Following the Fan Led Review, the UK Government has promised to implement an independent regulator, with a primary element of the role to seek financial fairness and Club sustainability throughout the football pyramid.

The survey has found the majority of respondents support this decision, with 79% of them saying that they would welcome the introduction of a regulatory body. While this view is shared more widely by the over-35 age demographic, there is close consensus across EFL Club fanbases that it would help with the ongoing development and direction of domestic football games.

**SUPPORT FOR AN INDEPENDENT REGULATOR:***

- **Strongly support**: 59%
- **Slightly support**: 20%
- **Neither support nor oppose**: 12%
- **Slightly oppose**: 2%
- **Strongly oppose**: 3%
- **Don’t know**: 3%

To what degree would you support the introduction, by the Government, of an independent regulator with powers to address the distribution of money in football in order to ensure the sustainability of Clubs and deliver fair competition between them? n= 38,182

81% of over 35’s support the introduction of an Independent Regulator in English football (vs 73% of under 35’s)
LET’S ROUND UP

We asked fans what they see as the principle function of the EFL. Upholding rules and regulations, administrating competitions, and ensuring an exciting competitive product were the most popular responses.

When it comes to Clubs, developing home-grown talent in the EFL is so important, so it is fantastic to see not only that fans agree, but that they view their Clubs as succeeding in this area – the future is bright.

What is also clear is that the majority of fans are positive towards partnerships with betting companies, as long as the necessary safeguards are in place and responsible gambling is promoted and ensured.

By listening to EFL fans, it’s clear that environmental sustainability, standing at matches, and diversity represent areas of focus that will help to shape the future of the EFL. Finally, it is also clear that supporters are concerned about a financial imbalance within the domestic game, and see the potential appointment of an Independent Regulator as a means to seek to address Club sustainability throughout the pyramid.