

2019 SUPPORTERS SURVEY



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FOREWORD

EFL

Welcome to the EFL Supporters Survey 2019.

The EFL regularly communicates with supporters on various subjects but this is the first time since 2010 that it has carried out such a detailed and comprehensive survey.

The response has been fantastic and close to 30,000 supporters took the time to fill in the online survey. I would like to thank everyone who responded as their input 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.

This year we asked a range of questions that reflect the football landscape in 2019, which touched on aspects of life outside of the traditional matchday experience. We also sought views on fans' feelings regarding their club, their routine when travelling to a game, their attitude to inclusion, live streaming, broadcasting and a whole host of other topics.

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 continues to meet the needs of fans.

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





EXECUTIVE SUMMARY

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SUPPORTERS SURVEY 2019

EXECUTIVE SUMMARY

OVERVIEW

The EFL Supporters Survey 2019 gave fans of all 72 EFL Clubs an opportunity to have their say on the major issues that affect the EFL, its Clubs and competitions.

The most comprehensive and wide-ranging Supporters Survey since 2010, it focussed on a range of key issues, such as the matchday experience, cup competition formats, match officials and broadcasting.

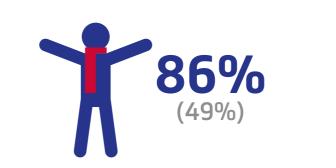
Nearly 28,000 people completed the survey. The EFL has since worked with its data partners Goodform to collate and analyse the findings, with all 72 Clubs receiving their own results, in addition to this report.

SURVEY RESPONDENTS

TOTAL SAMPLE SIZE



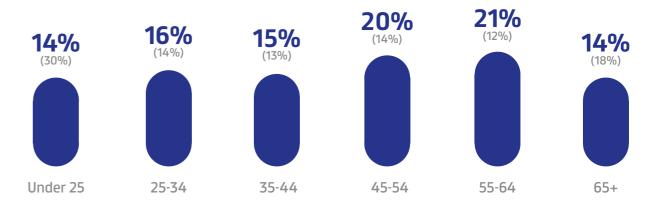
GENDER SPLIT*





14% (51%)

AGE OF RESPONDENTS*



*Note: ONS data for England and Wales in the brackets

EXECUTIVE SUMMARY | SUPPORTERS SURVEY 2019

EXECUTIVE SUMMARY | SUPPORTERS SURVEY 2019

SUMMARY OF RESULTS



RELATIONSHIP BETWEEN CLUBS AND THEIR SUPPORTERS



- Supporters of EFL Clubs have a deep emotional and social connection to their team.
- Family and friend connections are hugely influential in determining which club people support.
- There is a strong sense of family and community connection to Clubs, indicating the importance and success of activity in this area such as the Family Excellence Scheme and work carried out by Clubs in their local communities.

MATCH ATTENDANCE



- The 2018/19 season saw the highest attendances across the EFL for 60 years, and the survey responses reflect this high level of commitment, with 95% of supporters having attended at least one home game during the season, and three quarters also stating they attend away games.
- More than 80% get their match ticket information from Clubs' websites with the vast majority of supporters saying their Clubs made it easy to buy tickets
- A quarter of season ticket holders attend more games than they used to. This is especially true of younger fans as 32% of under 35s now go to more matches than previously.

MATCHDAY EXPERIENCE



- Atmosphere and safety are the two most important factors for match regulars, with the majority of Clubs again scoring highly in both of these areas.
- While 84% of supporters have witnessed abusive behaviour in the stands, 86% believe their club provides a welcoming and inclusive matchday experience for supporters. 33% believe there should be no place in football for aggressive/abusive behaviour
- The vast majority of supporters admit Match Officials have a very difficult job to do and nearly 60% of supporters in Leagues One and League Two would be supportive of their Clubs funding the introduction of professional referees in these divisions.
- Nearly two thirds of supporters would like both Goal Line Technology and VAR to assist match officials.

COMMUNICATION & CONTENT



- 89% of supporters use at least one of their club's own official channels to access post-match content.
- 58% of respondents access content online via a mobile phone during the match.





- 56% of fans feel positive when their team is selected as a live TV game with 67% saying it enables them to watch a game they otherwise wouldn't have attended.
- 90% of supporters do not believe that their club's matches being streamed online would influence their decision to attend a home game.

CUP COMPETITIONS



- 37% of supporters from League One and Two Clubs stated they would attend at least one EFL Trophy match during the season.
- Nearly half of supporters plan to attend Carabao Cup matches at some point in the competition.

THE EFL, POLICIES & PERCEPTION



- 86% of respondents feel it is important Clubs promote home grown talent while 69% believe their club has a good track record of nurturing young talent.
- 61% of supporters agree that the EFL's competitions remain engaging, accessible and enjoyable.
- 59% of supporters agree the EFL provides a sustainable and profitable League that gives all Clubs an environment to prosper and succeed.
- 58% of supporters believe that sponsorship by gambling companies is acceptable with suitable safeguards to protect the young and problem gamblers.

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SUPPORTERS SURVEY 2019



THE RELATIONSHIP BETWEEN CLUBS AND THEIR SUPPORTERS

THIS CHAPTER COVERS

- Reasons for becoming a supporter
- The importance of winning
- Age at which supporters attend their first match
- The role of the family unit
- Motivations to attend live football

OVERVIEW

This section explores the relationship that supporters have with their club and looks at factors that influence their choice of team and long-term allegiances. It also looks in detail at supporters' habits and reasons for attending matches, perceptions of their club, and what social factors help bind them to their local team and wider community.



WHAT THE RESULTS TELL US

The 2019 Supporters Survey has reinforced the view that supporters have a strong emotional and social connection to our football Clubs. Noticeably the survey illustrates a high commitment to match attendance, with 95% of respondents having attended at least one match in the 2018/19 season.

REASONS TO BECOME A CLUB SUPPORTER

The results demonstrate that family connections are highly influential in determining fans' allegiances to a team while proximity to the club also plays a significant role.









 $Base: All \ supporters \ n=27,671. \ Reasons \ that \ are \ lower \ than \ 10\% \ are \ not \ shown, \ full \ list \ can \ be \ provided \ on \ request$

THE IMPORTANCE OF WINNING

What has also emerged is an acknowledgement that supporting your football team isn't all about winning. When asked whether supporters feel other aspects of the matchday experience are more important than victory, fans cited 'experiencing the highs and lows', 'demonstrating loyalty to my club' and 'feeling a sense of belonging to my town or city's football Club' as meaning more than winning.



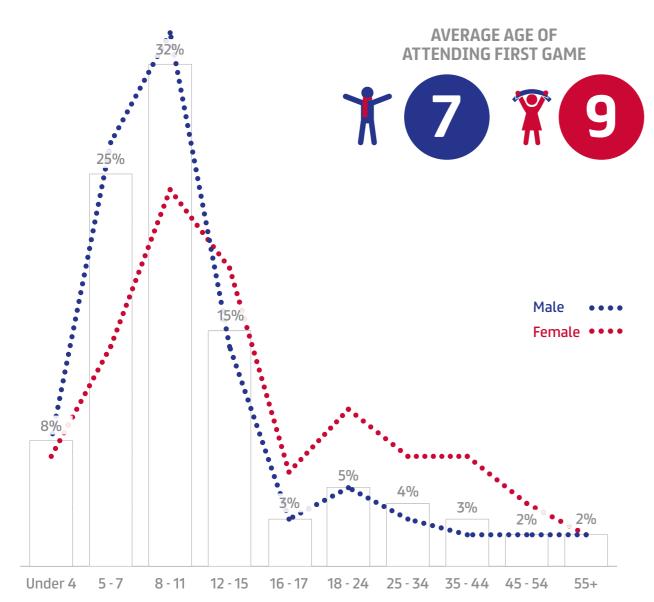


Base: All supporters n=26,465. On a scale of 1 to 5 where 1= much less important than winning, and 5=much more important than winning

A FAMILY AFFAIR



A connection to their club often begins at an early age, with more than two thirds of respondents having first gone through the turnstiles by the time they reach the age of 11, with most, on average, having attended their first game at around eight years of age.



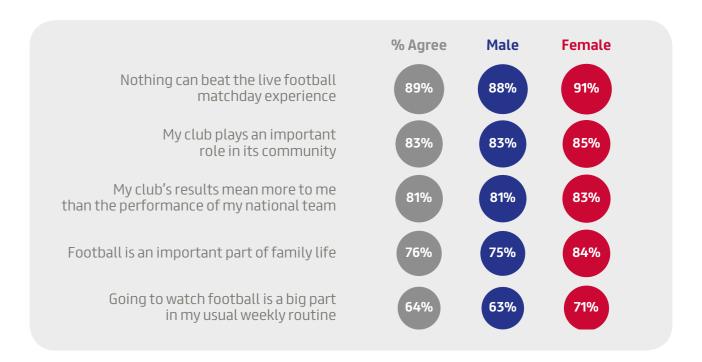
Base: All supporters n=27,854. Male supporter n=23,888. Female supporters n=3,789.

FOOTBALL IN THE LIVES OF SUPPORTERS

In addition, 75% of respondents said that going to the match was an important part of family life and 68% attended with someone from their family.

This sense of family and belonging is a consistent theme throughout the responses in this survey, suggesting supporters have a deep-rooted link to their childhood local team.





Base: All supporters n=27,854. On a scale of 1 to 5 where 1=strongly disagree and 5=strongly agree n=27,854

The importance of family appears to be even more prominent with female supporters, with 84% saying it is an important part of family life, compared to 75% of men. Indeed, the need for Clubs to attract the whole family is illustrated in the fact that 61% of female fans see immediate family supporting the club as an important factor.

This illustrates the importance of EFL Clubs' ongoing commitment to encouraging families with young supporters to attend games.

MOTIVATION TO ATTEND LIVE FOOTBALL

Continuing the family theme, supporting your local team is often a lifelong commitment, as shown by the 59% who say that 'passing on the support of my club to future generations' is more important than winning. When asked about motivations for attending live football, atmosphere also played a huge part with 84% stating it was the biggest draw while 71% said they enjoyed everything about the live matchday experience.

This demonstrates the factors that influence support are based around social and family aspects of attachment, and the shared, communal experience of supporting a club is highly important.



	Total	Male	Female
I enjoy the atmosphere in the stadium and amongst the fans	84%	84%	87%
To show loyalty to my club	71%	71%	74%
I enjoy everything about the live matchday experience	71%	70%	77%
It's the main way I can watch my club's games	61%	61%	61%
It's a chance to socialise with family/friends	53%	54%	51%
To enjoy the club's hospitality	6%	6%	6%
It's a chance to meet business associates	1%	1%	0%
None of these	1%	1%	0%

Base: All supporters n=26,465. Male supporter n= 22,638. Female supporters n= 3,667.





In the EFL Supporters Survey 2010, it was established that the level of interest in League football among female fans was growing. Nine years later and it's clear that female supporters are attending games in ever-increasing numbers. In total 3,789 female fans responded to the 2019 Survey, representing an increase of 21% on the previous study.

Female fans' dedication to the game can also be seen in the number of season tickets purchased. In the 2019 Survey, 64% of the female sample indicated that they were season ticket holders, compared to 53% of male fans.

The influence of family life on the viewing habits of female supporters is also interesting. In particular 'immediate family' has a stronger influence on attending games for female fans compared to their male counterparts (61% vs 45%). This is also evident on a matchday with women more likely to attend with immediate families than friends, (63% vs 32%).

Similarly, 84% of female fans agree that football is an important part of their family's life, compared to 75% of male supporters. Clubs can take heart from the news that 91% of female fans believe that 'nothing can beat the live football matchday experience' while 61% agree that football is about more than just winning, it's about creating memories and feeling a sense of belonging to their town or city's football club (62%). This is a strong message that supporting their club is about more than 90 minutes especially for female fans.



Attitudes towards bad language differ slightly from males with 36% of female fans saying that there should be no place for aggressive/abusive language at football matches (32% among male fans). Encouragingly, female fans also express that they are less frequently exposed to bad language compared to male fans, with only 24% stating they have heard it at matches attended over the past six months.

Females - like their male counterparts - place atmosphere in the stadium as a matchday priority. Significantly however, they place a huge emphasis on safety with 91% putting it second on their list of matchday priorities , compared to 77% of males. Stadium facilities, quality of stewarding, attitude of club staff/stewards and the activities/ entertainment on offer for children and families are also more important to female fans than males.

The good news is that female supporters consider EFL Clubs are delivering well on most matchday areas and rate the overall matchday experience more positively than male fans (43% vs. 30%).

CONCLUSION

As has been supported in findings from previous surveys, supporters view their connection to their club as an integral part of their social lives. Through a combination of factors such as friends and families, proximity to the ground and the desire to leave a legacy to future generations, it appears that fan allegiance to a team is part of their very identity.

This sense of belonging is no doubt influenced by the tender age in which supporters are going to their first game – a memorable occasion for many football fans that often lives with them forever. It is no surprise therefore that supporters see their choice of team as a lifelong commitment that can only be reinforced by the additional bonds to family and place.

This appears to be especially true in the case of female supporters who overwhelmingly see football as an extension of their family and social life. This is why the EFL and its Clubs remain determined to encourage families to attend football through such initiatives as the 'Family Excellence Scheme' and 'Enjoy the Match' campaign.









DONCASTER ROVERS





Doncaster Rovers' efforts to attract and retain young fans and families have been recognised throughout the 2018/19 season as they won an EFL Family Excellence Gold Award, were named EFL Away Fan Experience divisional winners in League One and were crowned overall EFL Family Club of the Year.

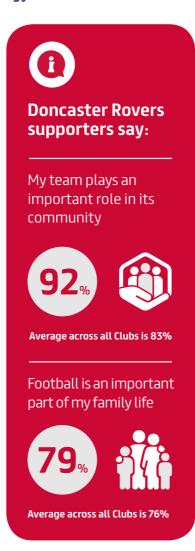
The club is acutely aware of the importance of being a 'Family Club' and points to a ticketing strategy which focuses on building and improving the fan experience and putting families first. As a result, they claim that the 2018/19 season has seen their ticketing revenues grow to their highest for five years.

Doncaster Rovers' Group Head of Marketing & Communications Shaun Lockwood, explained why reaching out to families is a key part of the club's engagement strategy.

As a club, we put a huge focus on growing our fanbase and reaching out to potential new fans. Families are a focus, if you can attract a family, often you're generating three, four or even five ticket sales at once and potentially creating new supporters that may spend with you over a lifetime.

"Our family matchday experience starts days before a game, using dedicated communication channels to provide families with the information they need to make an informed decision about whether a Doncaster Rovers match is a good family day out. We have a dedicated family microsite, first time fan guide, even our mascot, Donny Dog, has a twitter account. We use all of these channels to educate and engage families, providing information but also entertainment so the family feels engaged before their day out.

"On matchdays the focus then goes into making the experience about more than the football, our family zones (both home and away) provide opportunities for children to participate in interactive skill challenges, we provide free craft sessions, complimentary face-painting and have set up several games consoles for children to play. We then support this with unique experiences, giving children chance to read out the team sheets or get on the pitch. The purpose is to create positive memories for all the family that will make them want to return again and again, and become Doncaster Rovers fans for life.









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SUPPORTERS SURVEY 2019



2 MATCH ATTENDANCE

THIS CHAPTER COVERS

- Attendances
- Season tickets
- Purchasing match tickets
- Ticket information
- Matchday travel

OVERVIEW

As one of the most important sections within the survey, this chapter addresses the main influences of matchday attendance, to understand how and when supporters buy tickets, how they travel to matches, and other factors that influence decisions around matchday habits and levels of commitment. It also explores the many ways in which fans source information about tickets, and how this may differ between age groups.



WHAT THE RESULTS TELL US

The 2019 Supporters Survey results have revealed a strong commitment and loyalty amongst the majority of fans, with 95% of respondents having attended least one match this season.

ATTENDANCES

In 2018 /19 crowds reached their highest levels in 60 years as the total attendence for league fixtures reached 18.4 million, the highest figure since 1959.

This is the third successive season attendances have topped 18 million.

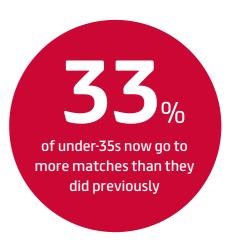
This hugely committed fanbase is naturally reflected in the survey responses. A highly significant 95% of respondents have attended at least one match over the previous year, three-quarters have travelled to at least one away match, with 74% stating that they usually attend a number of both home and away fixtures each season.





SEASON TICKETS

Season ticket holders account for 55% of the respondents to the survey, with an additional 23% having previously held a season ticket at their Club. This commitment to attending games is also reflected in the fact that more than 40% attend the same number of games they always have, while a quarter actually attend more games than they used to. This is especially true of younger fans as 33% of under 35s state they now go to more matches than they did previously.



Overall the main motivations for supporters when purchasing a season ticket are to guarantee a seat for all matches, and to demonstrate loyalty to their Club. There is some variance between divisions, with 77% of Championship supporters buying season tickets to ensure they have a seat at each game, compared to 63% in League Two.





DEMONSTRATES LOYALTY TO MY CLUB

66%



CHEAPER THAN BUYING TICKETS INDIVIDUALLY

63%

	TOTAL	UNDER 35	35 & 0
It guarantees me a seat for all regular season home games	73%	70%	749
Demonstrates loyalty towards my Club	66%	72%	649
Cheaper than buying tickets individually	63%	62%	649
It means I will not lose my seat	49%	41%	519
It gives me priority booking access for cup and away league games	47%	45%	489
Additional benefits/membership (Club shop discounts, priority access, etc.)	24%	22%	249
Other	4%	3%	4%

 $Base: All \ supporters \ n=14,983. \ Under \ 35 \ years \ supporter \ n=4,006. \ 35 \ years \ and \ over \ supporters \ n=10,955.$

SEASON TICKET RENEWAL

When looking at potential barriers to buying season tickets, it is clear that factors outside the control of the club can play a big part.

For instance, not having enough free time and being too far from the club are two reasons why people don't purchase tickets. However, just over one-in-five stated cost was a reason for no longer holding a season ticket. Noticeably team performance was only an important factor for 10% of supporters.

OVER HALF OF SEASON TICKET HOLDERS DID NOT RENEW DUE TO WORK/ FAMILY COMMITMENTS



FACTORS INFLUENCING SEASON TICKET PURCHASE

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

	TOTAL	UNDER 35	35 & OVER
Work/family commitments	47%	51%	45%
I no longer live close enough to the stadium	31%	32%	30%
Lack of disposable income	22%	24%	21%
Season tickets are too expensive	20%	26%	18%
Too many fixtures were moved for broadcast	13%	11%	13%
I did not feel my support was valued by the club	11%	10%	12%
My team was not performing well	10%	9%	11%
Change in club ownership	8%	7%	8%
I had no-one to go with	6%	8%	5%
Poor stadium facilities	3%	3%	3%
Poor range and quality of refreshments	3%	3%	3%
Poor transport links to the stadium	3%	3%	3%
Poor stewarding/security	2%	2%	2%

WORK & FAMILY COMMITMENTS

31%
NO LONGER LIVING IN THE AREA

22%
LACK OF DISPOSABLE INCOME

Base Previous season ticket holders n=6207. Under 35 years n=1956. 35 years and over n=4238.

ENCOURAGING SEASON TICKET PURCHASES

The factors influencing potential future season ticket purchases remain similar for supporters, regardless of whether they have or haven't held a season ticket before. 'Living closer to the stadium' appears to represent a significantly greater barrier for those who have never held a season ticket.



	LAPSED SEASON	NEVER HELD A
	TICKET HOLDERS	SEASON TICKET
Having more available time	42%	45%
Cheaper season ticket prices	38%	34%
More disposable income	29%	36%
Living closer to the stadium	29%	49%
Fixtures not being moved for broadcast as frequently	19%	18%

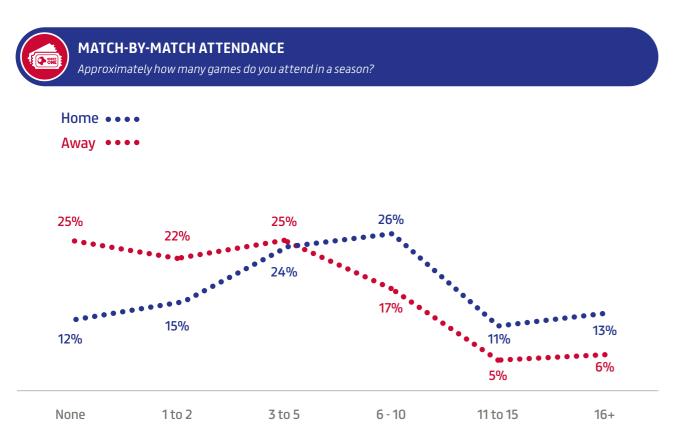
Base: Lapsed Season Ticket Holders n=5907. Never had a season ticket n=6313.



HOME AND AWAY MATCH ATTENDANCE

It's clear that similar factors influence non-season ticket holders when deciding whether to go to the match. For home matches, while cost and ticket availability are strong reasons, the logistics of attending away fixtures are key to fans' decision making. Encouragingly, further to the 95% of supporters who have attended at least one home game in the last 12 months, 75% of supporters have also attended at least one away game.

It's also clear that each factor becomes more influential when planning to go to an away game.



 $Base: Home\ matches\ -\ Supporters\ who\ are\ non-season\ ticket\ holders\ n=12,520.\ Away\ matches\ -\ All\ supporters\ n=27,503$





INFLUENCES ON MATCH ATTENDANCE

To what extent does each of the following factors influence your decision to attend a game?

HOME

44% Other commitments (e.g. family) 43% The cost of buying a ticket 43% Ticket availability 35% When the match is played (e.g. midweek) 32% Kick-off time 31% If it's a big game (e.g. local derby) 24% The distance to travel to the game 23% The cost of travelling to the game

Base: Supporters attending Home matches n=26,053

AWAY

58% When the match is played (e.g. midweek) 54% The distance to travel to the game 53% Other commitments (e.g. family) 48% The cost of travelling to the game 47% Ticket availability Kick-off time 42% 39% The cost of buying a ticket 37% If it's a big game (e.g. local derby)

Base: Supporters attending Away matches n=20,690

PURCHASING MATCH TICKETS

As expected, supporters place significant importance on ease of finding ticket purchase information and broadly speaking it seems that most are satisfied with the process in place at their respective Clubs. When asked to indicate their overall level of satisfaction, respondents were often pleased with their ability to obtain information on fixtures, levels of ticket availability, and ways to purchase tickets online.

More than 80% of supporters state they get their ticketing information from club websites, while 60% of under 35s visit club social media platforms. Given the overall levels of satisfaction this suggests Clubs are listening to their fans' preferences and acting on them.

Importance

Satisfaction



77% Clear release dates of fixtures 79% 71% Being able to purchase tickets for friends / family 76% 71% Clear indication of ticket availability 81% 69% Having the ability to order tickets online 83% 69% Clear pricing options / structure 77% 67% Location of seat / stand within the stadium 85% 65% The purchase process is easy 60% Helpfulness of club staff 81% 57% Having clear instructions on how to collect tickets 78% 56% Having someone to contact to ask guestions 71% 55% Attitude of club staff 80% 39% Having the ability to print off tickets ahead of the game 63% **32%** Earning points as part of a membership / loyalty scheme 42%

Base: All supporters n= 22,448

This is specifically reflected in data on purchasing home tickets, with supporters again placing a significant emphasis on the ability to buy tickets online and having clear fixture release dates.

Again, the majority of supporters indicated they were satisfied both with the ways in which they could buy a ticket and the choice of stand or seat within the stadium.

MORE THAN

80%
GET TICKETING
INFORMATION FROM
CLUB WEBSITES



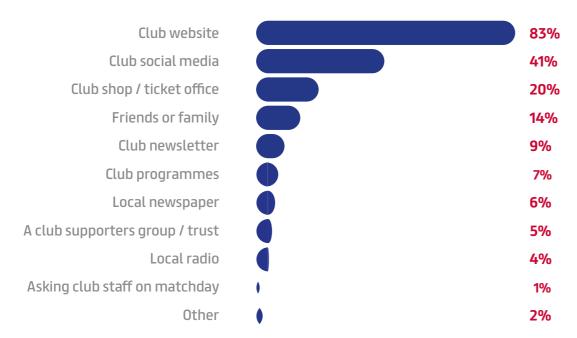
TICKET NEWS AND INFORMATION

What's also clear is that fans prefer to get their ticket news and information direct from the club, with the majority favouring their team's official website as a trusted source. For example, 97% of supporters go to their club's official channels for key information about attending games, in particular the club's official website (83%).

Again, there is a clear split between age groups in terms of how they prefer to access information. Supporters aged under 35 years (60% vs 33%) display a stronger preference for information via social media platforms and this also applies to how they consume ticketing information.







Base: All supporters n=26,465

TRAVELLING TO THE MATCH

Another key decision that fans need to make around matchday is how they get to the ground. Travelling by car is the most common method for getting to the game, both for supporters travelling home and away. For fans attending away fixtures, train and supporters' coaches become a more popular method of travel.

Given the importance of train travel to away fans, the EFL continues to work with transport bodies and other stakeholders to identify ways of encouraging more supporters to use rail travel. So, while 68% rate the rail service they use as good or very good, fans suggest a number of possible enhancements including more regular services and no extra costs to reschedule train tickets in the event of a game being moved.



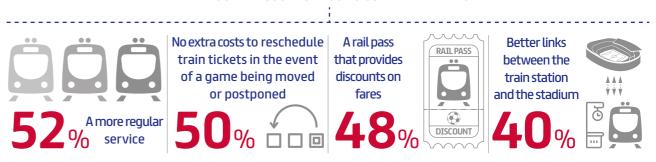


TRAIN SUPPORTERS' COACH

HOME AWAY HOME AWAY HOME AWAY

66% 52% 13% 26% 2% 18%

WHAT WOULD ENCOURAGE YOU TO USE THE TRAIN MORE?





When it comes to attracting supporters and making getting to the game easy, it's clear from the survey responses that MK Dons fans believe their club excels. The club's Box Office Manager Oona Carmichael explains their ticketing strategy and why the creation of an attractive pricing model, and matchday experience for home and away supporters, is crucial in building for future success.

As one of the younger members of the EFL, we have had to develop and engage a new fanbase within a community only established in the last 50 years. Family engagement is very much at the forefront with 33% of MK Dons season ticket holders aged under 18. Our club is in a unique position where it is often a younger generation introducing their parents and grandparents to live football at their local football club rather than the traditional way of support being passed down from older fans to their children.

"We aim to make attending as affordable as possible, highlighted by the club's 12 month interest-free payment scheme for season tickets. This process managed in-house, with automatic renewals in April each year each helping to retain support whilst simplifying the annual season ticket renewal prices for all supporters, with 70% of season ticket holders pay for their season tickets using the scheme.

"The club also operates an 'Under-12s Go Free' scheme, which is promoted heavily in schools by our Community Trust and at local junior football clubs. The Club has 700 season ticket holders aged under 12 and a further 2,000 junior members aged 12 or under.

"Underpinning our ticket strategies is extensive supporter consultation and fan engagement, driven by the club's Attendance and Matchday Experience supporter working groups, who meet regularly throughout the season. Both enable supporters to meet with our executives to develop ticketing promotions and review and improve all aspects of the supporter experience from travel to the game to stewarding, concessions and entertainment. All these aspects are ranked in order of delivery and importance to supporters to ensure the right factors are properly prioritised.



"The club also believes that away supporters are a vital component of the matchday atmosphere and have welcomed large travelling support for a number of fixtures in recent seasons. Over 5,000 fans from Lincoln and Mansfield supported their team at Stadium MK in 2018/19, taking the average away attendance at Stadium MK in that season to 988. The club believes that any promotion offered to home fans should equally apply to away supporters and has benefited financially from a focussed strategy in increasing away numbers wherever possible. Ultimately it all adds to the matchday experience, and we want to ensure as many fans as possible see MK Dons as a superb away day destination.



CONCLUSION

A survey conducted halfway through a season where attendances reached their highest level for 60 years unsurprisingly shows an engaged fanbase, with 95% of respondents having attended at least one game.

Clubs are working hard to make it easier to purchase tickets and attend the game, and their growing use of technology means supporters are feeling increasingly engaged. This is especially true of younger fans who are using club social media platforms in ever increasing numbers. This presents Clubs with numerous opportunities to enhance and innovate around engagement with their supporters and to build on the sense of social cohesion that exists in football.









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SUPPORTERS SURVEY 2019



MATCHDAY EXPERIENCE

THIS CHAPTER COVERS

- Importance of the live matchday experience
- Matchday programmes
- Food and drink
- Atmosphere in the stadium
- Safety, security and stewarding
- Inclusivity on matchdays
- Awareness of EFL initiatives
- Match officials

OVERVIEW

In this chapter we explore supporters' perceptions of the matchday experience. There are many elements of attending fixtures that can influence fans' views of their club and impact on the overall experience they have, and we look at the performances of Clubs in terms of atmosphere, safety, accommodation, refreshments, and more.



WHAT THE RESULTS TELL US

The results demonstrate that supporters enjoy the unique experience of going to the match, in particular fans generally feel safe and welcome, watching their team in an environment where they can enjoy the atmosphere.

As we explored in Chapter 1, motivations for supporting a club and attending matches are heavily influenced by family, friends and the prospect of being part of a communal experience, perhaps something that matchdays offer that may not be available elsewhere. There are many important contributory factors that influence the experience fans have, but none more so than being part of a live event.

ARRIVING AT THE GROUND

The matchday experience extends well beyond the 90 minutes of the match itself. The results tell us that 39% of respondents indicated they will arrive at the stadium for a home match in the final 30 minutes before kick-off. This is compared to 75% who arrive at away games with more than 30 minutes before kick-off. This is not surprising as supporters are likely to ensure they factor in sufficient flexibility around their journey to away grounds.

Once arriving at the stadium, supporters show a broad range of habits, representing their own individual matchday journeys. For example, 39% of supporters will go to a local pub before entering the stadium and this is higher for Championship Clubs, male supporters and those aged under 35 years.

In terms of club-specific routines, 41% of supporters will go straight inside the stadium once arriving at the ground and this is higher for season ticket holders, League One and League Two Clubs. For supporters who feel less valued by their Clubs and those who indicate lower matchday satisfaction levels, there is also a trend that indicates they are more likely to go straight inside the stadium.





arrive 30 minutes or less before a home game



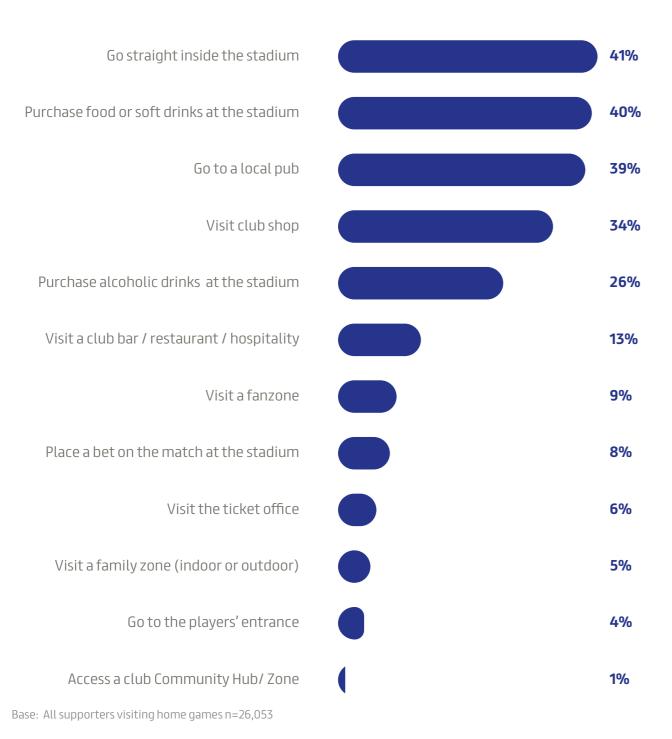
arrive over 30 minutes before an away game



3. MATCHDAY EXPERIENCE | SUPPORTERS SURVEY 2019

3. MATCHDAY EXPERIENCE | SUPPORTERS SURVEY 2019





Go to a local pub

i 48% of under 35s

i 36% of those 35+

Purchase alcoholic drinks

7 27% of men

Q 18% of women



50

WHAT'S IMPORTANT TO SUPPORTERS

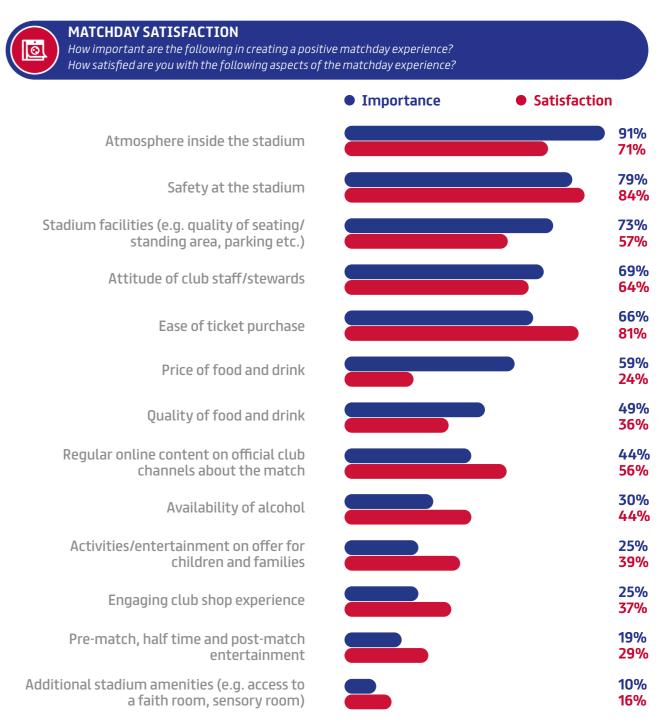
In terms of the matchday experience, supporters state atmosphere and safety are the two most important factors when attending the game. As already discussed female supporters place greater emphasis on the importance of safety (91% vs. 77% for male supporters) but all respondents are largely content that their Clubs deliver in this area.

While there are a range of other factors rated by supporters, such as the provision of alcohol, activities for children, an engaging club shop experience, and pre-match and half-time entertainment, fans tell us they are not integral to the overall matchday experience they have. 91% overall

to the overall matchday experience they have.

However what is also clear is that, while supporters rate such aspects as atmosphere and safety extremely highly along with facilities, and attitudes of staff/stewards there remains an expectation that Clubs could always do more.

In particular, Clubs should be encouraged to do whatever they can to help generate a positive atmosphere inside the stadium as this clearly enhances the overall matchday experience for all supporters.

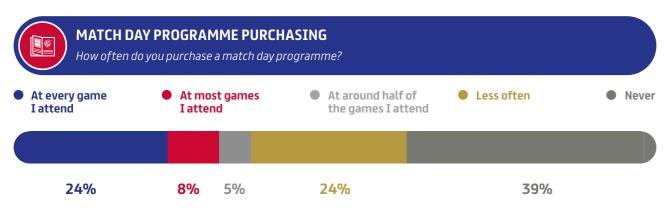


Base: All supporters visiting home games n=26,053

MATCHDAY PROGRAMMES

Matchday programmes still have a role to play for many supporters, with one in four purchasing a programme at every game they attend, acting as a memento of the game which they can add to their collection, as well as keeping them up to date on all the traditional latest news and features from both management and players.

Nearly 40% of supporters state to never buying a matchday programme, with the biggest barriers to purchase being; a lack of interest in the content, the price and the fact that they can find more up-to-date information online, negating the need to invest in a matchday programme.



Base: All supporters visiting home games n=26,465



	TOTAL	UNDER 35	35 & OVER
I am not interested in the content	44%	53%	40%
Price/value for money	37%	38%	36%
More up-to-date information online	32%	31%	33%
I can find all the information elsewhere	25%	28%	24%

Base: Supporters who never purchase a matchday programme n=10,289



MATCHDAY BEHAVIOUR & INCLUSIVITY

While atmosphere remains an integral part of the fan experience, there are some aspects of crowd behaviour that provoke a less positive response. Nearly 70% of supporters state they have witnessed aggressive or abusive behaviour at matches in the last six months, however this does not seem to significantly impact on their decision to attend matches.

Further to this, half of the survey respondents state that they tolerate this behaviour as they see it as 'part of going to football'. This attitude, however, seems to be more prevalent among supporters under 35 years; with supporters aged over 55 years appearing to be much less tolerant of abusive behaviour.

Encouragingly, it is clear that supporters believe their Clubs perform well in combating anti-social behaviour, with 86% of respondents believing their club offers a 'welcoming and inclusive matchday experience for all supporters'. Furthermore, only 4% of supporters disagreed with this statement.



	TOTAL	U35	35+	MALE	FEMALE
Every game	11%	15%	10%	12%	9%
Most games I've attended but not every game	14%	16%	14%	15%	13%
Occasionally	44%	36%	47%	43%	49%
Never	27%	27%	28%	28%	27%
Don't know	3%	6%	2%	3%	3%

Base: All supporters n=26,465. Under 35 years n=7,916. 35 years and over n=18,506. Male supporters n=22,638. Female supporters n=3,667.



	TOTAL	UNDER 35	35 & OVER
I don't mind it and it's part and parcel of going to football matches	50%	60%	46%
There should be no place for aggressive/abusive language	33%	14%	40%

Base: All supporters n=19206. Supporters aged Under 35 years n=5,752. Supporters aged 35 years or older n=13,418

FAN FOCUS ON INCLUSIVITY

Over recent years, the EFL and individual Clubs have worked hard to promote inclusivity and accessibility within the game, welcoming supporters from all communities.

As already established, going to watch football is a social activity enjoyed with friends and family. It is therefore important to understand the matchday experience of all supporters, including those from minority communities.

When looking closely at the experiences and priorities of fans from BAME, disabled and LGBT communities, the data would suggest that their overall perceptions, particularly on matchdays are fairly consistent with all supporters.

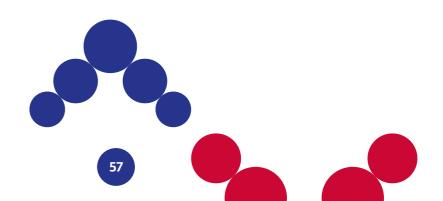
There are several areas where the results of BAME, disabled and LGBT supporters compare favourably with the total fanbase, including feeling valued by their club, the importance of their club as a focal point for its local community, belonging to their town or city and atmosphere in the ground.

While data shows consistent results throughout all groups, there is always to more work be done. This is seen in the results related to whether or not supporters believed their club provides an inclusive and enjoyable matchday experience for all supporters, regardless of their background, religion, sexual orientation or ethnicity.

How do you rate your Club's overall matchday experience? **SUPPORTERS** SUPPORTERS SUPPORTERS DISABLED **SUPPORTERS** On a scale of 0 - 10 0=very poor and 10=excellent

This is why the EFL and its Clubs continue to work to deliver an inclusive football experience for all. The EFL's Code of Practice underpins this work, to ensure inclusivity is embedded in the culture of all EFL Clubs.

	ALL SUPPORTERS	BAME SUPPORTERS	LGBT SUPPORTERS	DISABLED SUPPORTERS
I feel valued by my club when attending matches	3.55	3.58	3.59	3.59
My club provides an inclusive, accessible and enjoyable matchday experience for all supporters	3.95	3.88	3.93	3.91
It is important that my club is a focal point for its local community	4.35	4.33	4.36	4.39
Experiencing the atmosphere at the stadium	3.24	3.33	3.38	3.40
Feeling a sense of belonging to my town/ City's Football club	3.64	3.73	3.77	3.78
My Club provides an inclusive and enjoyable matchday experience for all supporters, regardless of background, religion, sexual orientation or ethnicity.	4.38	4.27	4.17	4.35





CODE OF PRACTICE

The EFL's Equality Code of Practice covers 12 areas of accountability from the matchday experience, reporting incidents, legal compliance to academies and community work.

It sets out where the responsibilities lie for Clubs and the League, as employers and event organisers, and asks that Clubs demonstrate minimum requirements across all 12 areas.

The Code makes it clear that it is the Club's board that sets responsibility for equality at the highest level in the organisation.

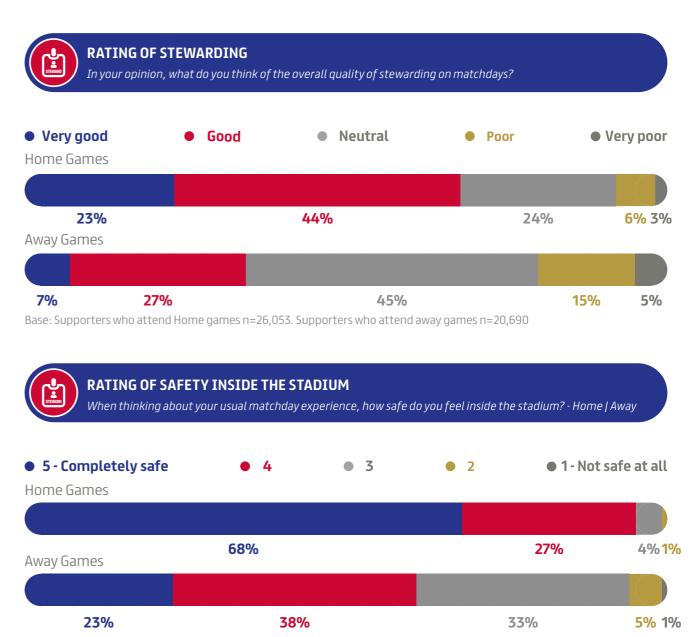
They also have a commitment that everyone associated with a Club, be it supporters, sponsors and staff are aware of the importance of inclusion and Clubs plan a series of events every season to raise awareness.

SAFETY & SECURITY

When attending matches, what stands out from many of the responses is that the vast majority of football supporters feel safe, the majority of the time. Not only is safety important to people, as previously mentioned, but Clubs are delivering on their duty to keep fans safe.

Away supporters don't always feel as safe, but this is likely to be influenced by their unfamiliarity with their surroundings. As a result the work of staff, stewards and police is vital in creating an environment where fans feel safe enough to focus solely on events on the pitch.

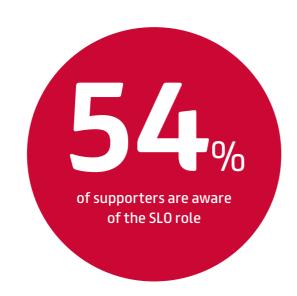
Supporters are also encouraged to increase their overall enjoyment of matchdays by planning their journey to the game in advance, minimising what they carry into the stadium and remaining vigilant. These general safety messages are contained in the 'Know the Game Plan' initiative, launched in season 2018/19, which aims to promote safety and security at football.



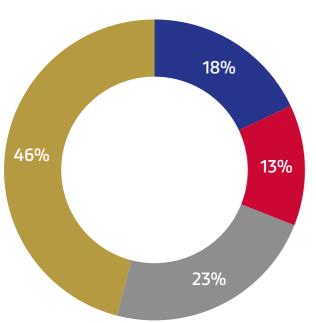
Base: Supporters who attend Home games n=26,053. Supporters who attend away games n=20,690

SUPPORTER LIAISON OFFICERS

The results show that nearly a third of supporters are aware of their club's Supporter Liaison Officer (SLO), even if some of them are unsure how to contact them if needed. As already established, there is a desire among supporters to feel more valued by their Clubs, and SLOs could potentially play a key role in helping to foster this connection between club and fans. Their role is to be a bridge between fans and the club to help improve dialogue between the two sides, acting as a club ambassador championing effective communication, understanding and supporter service.







Base: All supporters n=27,671

- I am aware of my club's SLO and how to contact them if needed
- I am aware of my club's SLO, but I'm not sure how to contact them
- I am unaware of my club's SLO but have heard of the role before
- I have not heard of the role before



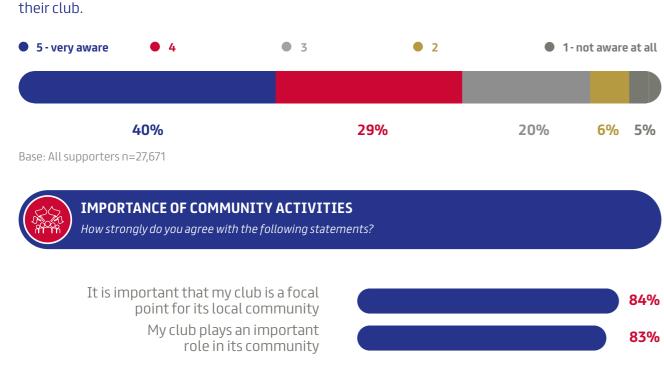
COMMUNITY ACTIVITIES

Most football Clubs grew out of their local communities and there is a widespread acknowledgment among fans that they continue to play a key role today. As part of this relationship, nearly 70% of supporters are aware of their club's activity within the community. The majority of fans believe their club should be a focal point for the local area. As a result, making fans more aware of their club's community activities can only be beneficial to all.



AWARENESS OF CLUB COMMUNITY ACTIVITIES Please confirm your level of awareness of the Community activity carried out by your club?

Two thirds of fans state that they are very or quite aware of the community activity carried out by



Base: All supporters n=27,854

EFL INITIATIVES

While respondents agree that Clubs perform well in creating a safe, inclusive and welcoming matchday environment, there is also significant awareness amongst respondents of both Kick It Out and Rainbow Laces campaigns. Elsewhere, awareness of additional initiatives is rather mixed, but there are real opportunities to ensure all supporters are conscious of the positive work being spearheaded by the EFL and their Clubs.



29% of fans who try to attend all EFL Trophy games are aware of 'Every Game Matters'





Base: All supporters n=27,854





Pompey in the Community's Head of Community Projects, Clare Martin, explains the club's philosophy towards community engagement, and ensuring Portsmouth offers a welcoming and inclusive environment on matchdays and beyond.

Portsmouth Football Club is more than a community club, its community is the club. There is a desire to ensure the best of the city is represented in everything we do, and we strive to make everyone connected to us feel welcome and valued.

"Pompey in the Community, the club's Community Trust, works with some of the most vulnerable groups in our city, as well as providing opportunities for children and young people to participate in football at whatever level of ability.

"A long-term strategy has been adopted, first seeking to make the club a good neighbour, before looking at ways communities can be engaged as fans. In recent years there has been a conscious shift to better represent the diverse ethnicity and religious mix of the city, and outreach work with faith groups, for example, is slowly beginning to bear fruit.

"Other under-represented groups are also fully engaged, with the club working closely with its disabled supporters association for more than five years, and now has a thriving LGBT supporters group.

"Pompey in the Community work tirelessly to give people from all backgrounds the confidence to attend matches and become a part of the Club. Most matches at Fratton Park are themed with community tickets offered to groups linked to particular initiatives. These have included our women's team attending along with 200 girls from grassroots teams, and a focus on disability, linked to our constant aim to improve the matchday experience for all.

A large part of our community ethos is working with our fans with a spirit of "yes we can". Wherever possible we endeavour to ensure fans feel welcomed and truly embedded in the values of the club.





3. MATCHDAY EXPERIENCE | SUPPORTERS SURVEY 2019

3. MATCHDAY EXPERIENCE | SUPPORTERS SURVEY 2019

MATCH OFFICIALS AND NEW TECHNOLOGY

Overwhelmingly, supporters across the country recognise that referees have a difficult job to do, with 71% believing 'the job has got harder in recent seasons'. This demonstrates clear empathy amongst supporters for the challenging nature of the role of Match Officials in the modern game. What is interesting is that these supporters are also more likely to believe Match Officials treat players and managers with respect, however they do not believe managers and players show the same levels of respect towards referees.











Base: All supporters n=27,854

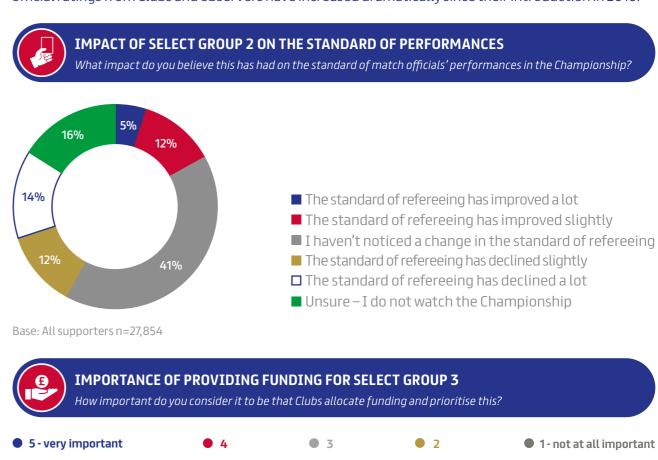
SELECT GROUP 2 REFEREEING

While supporters have a range of views on the overall quality of refereeing, the EFL has been working to improve standards. In a move funded by Clubs themselves, the 2016/17 season saw the introduction of Select Group 2 professional match officials in the Championship, to look to improve standards and create a clear development pathway for all officials across the EFL. Perceptions of the success of its introduction are mixed, with those fans watching Championship football on the whole relatively undecided on whether there has been any change in standard of performance.

Based on the introduction of Select Group 2 officials, we took the opportunity in the current survey to also ask fans to indicate their support for the potential introduction of professional referees in League One and League Two, and creation of Select Group 3 match officials.

Respondents overall indicate a preference for their introduction with over half of supporters believing it is important, rising to nearly 60% of respondents in League One and Two. The majority of supporters say it is important that their Clubs allocate money and prioritise funding for this.

It is important to note however that, while perceptions among supporters are somewhat mixed, official ratings from Clubs and observers have increased dramatically since their introduction in 2016.



Base: All supporters n=27,854

26%

66

30%

27%



Darren, you have officiated for many years now at different levels of the game but tell us a little about becoming a referee at Select Group Two (SG2) level and specifically officials at Championship level.

Before SG2, the biggest challenge as a referee was juggling life, and having another job while still trying to be a referee to the highest possible standard. Essentially, before SG2, it was a part-time role but because the Clubs expect you to be professional and perform to a high standard, the main challenge was balancing all of that. We still had to make sure we could train properly, prepare properly, do the games at the weekends and midweek, while all the time juggling another job and family time. It was a really big challenge, but the introduction of Select Group 2 has been fantastic.

What would you say were the benefits to becoming a full-time professional Match Official?

It has obviously made it a full time job, allowing us to train properly. Previously we might have had a quick 40 minutes to do a session in the gym and that's all we had because of other work commitments, but SG2 allows us to train, prepare and recover properly, to deal with what is now a very demanding football schedule.

With additional time to train and prepare, in what ways do you feel this benefits SG2 officials?

Just in terms of the ability to prepare and train it's a significant improvement. We have fitness tests pre-season and during the season, we have our body fat measured every month and we wear heart-rate monitors for our sport scientists to track the data and look at on a weekly basis. This then determines whether we are working at the right intensity for the games we have coming up.

We now attend training camps which consist of many technical training sessions in the classroom, but also includes practical sessions as well. We do pitch intensity sessions, and also spend time in the gym doing strength and conditioning and hydrotherapy sessions - just trying to get our bodies in the best possible shape for matchdays.

As a group we train together every two weeks, but we train independently by ourselves almost every day. We all have training plans given to us by our sport scientists, so there are not many rest days as a Select Group 2 referee.

It's clear that SG2 officials now have more time to prepare for games but what about performance review and analysis, is that also given more time?

We go through many different forms of evaluation post-match as referees. Every game, no matter what level you're refereeing at, is attended by a match assessor. We also work with our full time coaches on a day to day basis. We review incidents, both at the training camp and back at home as well, we're ultimately analysing where we can do better at all times, as well as learning from best practice and experiences of all SG2 officials.

We break down the key match decisions such as penalties, red cards, offsides - they're all looked at and we are provided that data on a week-by-week basis to see where we are in the performance table.

It's clear the modern referee has to be fitter and more aware of their performances than ever before, so what are your views on technology assisting officials in the modern game?

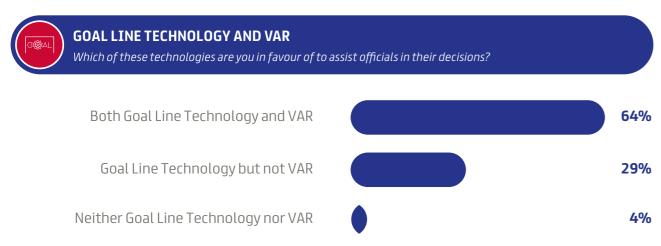
The introduction of technology has been fantastic overall for officials. Certainly, Goal Line Technology (GLT) has been fantastic because it's now black or white - it's either a goal or it's not. It helps that everyone sees when we point to our watch when we give a goal, it's a clear way of reaching a decision.

Some GLT decisions you see are about one centimetre away from being a goal or viceversa which shows the almost impossible task it is to see in 'real time', so the introduction of technology has helped us on that front.



THE ROLE OF TECHNOLOGY

With modern developments in the use of technology to support officials' decision making, the survey also represented the ideal opportunity to understand the current views of supporters across the EFL. The 2018/19 season saw Goal Line Technology (GLT) being used across the Championship for the second season since its introduction. The use of Video Assistant Referees (VAR) has also been trialled in some Carabao Cup games.



Base: All supporters n=27,854





610

agree that VAR should be used at all times and wherever possible



THE USE OF VAR TO ASSIST MATCH OFFICIALS

To what extent do you agree with the following statements about when VAR should be used to assist match officials in making decisions, on a scale of 1 to 5?

VAR should be used at all times and wherever possible

VAR should only be used for decisions inside the penalty box

VAR should only be used for serious foul play

VAR should only be used if there is no delay in play

Base: Asked to those who are in favour of VAR n=18,041





4%

reject the idea of technology being introduced into the game



state that VAR should **ONLY** be used if there was no delay in play

CONCLUSION

Having arrived at the ground, supporters expect to feel welcome, safe and free to enjoy the build-up and atmosphere of matchday. So, it is heartening to see the vast majority of supporters do indeed feel their ground offers a welcoming experience to most fans. While the majority of fans have heard or witnessed abusive behaviour at a football ground, most of them would also state they felt welcomed. This general feeling of football being a game for all, is also reflected in the high levels of awareness of various campaigns and initiatives, many of which are designed to improve both inclusivity and the matchday experience for all fans. There is also a widespread acceptance that, while Match Officials have a difficult job to do, most people welcome the use of technology to support their decision-making.





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SUPPORTERS SURVEY 2019



CONTENT & COMMUNICATION

THIS CHAPTER COVERS

- The impact of digital technology
- Club websites
- Role of social media
- Other sources of official club information
- Local and national media
- Post-match content
- Information during the game

OVERVIEW

If there is one area of the game that is almost unrecognisable from the last full Supporters Survey in 2010, it is the way people communicate about the match and their club. This chapter shows how digital technology has revolutionised the methods many supporters use to stay up-to-date with news about their team.

Communication for supporters now manifests itself in many forms, with the average supporter engaging with over five different channels of communication with their club. Supporters now have the ability to access and receive information about their club 24/7, through both club official channels and other information sources.



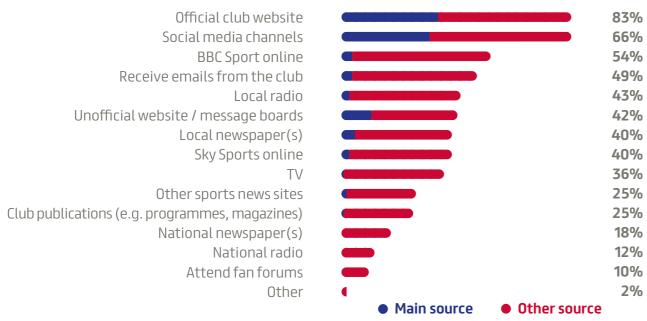
CLUB WEBSITES

Over the last decade, the way supporters consume news about their Clubs and share their stories has undergone a massive change.

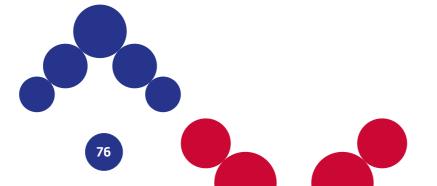
While the results show a huge number of fans now use social media to engage with football, there remains one place where supporters overwhelmingly go for information they can trust – their club website. Clubs' official websites remain a key source of information for most supporters. Official club websites are used by 83% of supporters as either as a primary or secondary source of information. This shows that supporters trust their Clubs to provide accurate, up-to-date information and that, in the main, Clubs are successful at providing this service.

INFORMATION SOURCES

Which of the following sources do you use to find information about your Club? And which of the following do you use as your main source of information about your Club?



Base: All supporters n=27,854



OTHER SOURCES OF OFFICIAL INFORMATION

Social media now plays a huge part in many supporter's lives, revolutionising the way people stay connected. Football is no different of course, and supporters now use a range of platforms to stay in touch with their club, sharing in the highs and lows of their team's season. This changing media landscape is reflected in the fact that two-thirds of supporters now use social media as their main source or secondary source of club-related information. This figure remains broadly consistent across the EFL divisions.

However supporters aged under 35 demonstrate much higher usage than those aged 35 or over (85% vs. 58%).

It is clear that obtaining information via official club sources is important to fans. Season ticket holders, female supporters and those attending with children are also more likely to engage with Club emails.

Supporters aged over 35 are more likely to favour engagement with their club via email communication. This difference could be as a result of the fact younger people are more likely to use social media for information.



Which of the following sources do you use to find information about your Club?







































City's Media Content Editor James Crawley explained how innovation and teamwork have combined to help the club reach as many fans as possible:

It's a real team effort to operate the website as a daily news site and to deliver as much engaging, interesting and fun content as we can. So to see how much our fans appreciate and use our channels is great to see. As well as publishing key information, we are finding ways to entertain the fans as well and there's certainly more to follow in 2019/20.

"We are publishing daily updates on everything City-related with articles, videos, quizzes and features, all of which are shared across the website and through social media, which of course includes the familiar pre-match and post-match messages as well as other, fun or off-topic content.

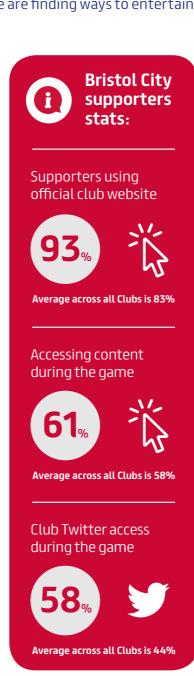
"Quizzes and more picture-focussed articles for the website have proved to be more engaging for our fans, while for the 2018/19 season we introduced more content for our social channels, notably Facebook and Twitter.

"On a matchday, we are capturing moments of player celebrations in the tunnel and we've seen the social figures around these behind-the-scenes clips soar. On the website we have a matchday centre with a live text feed and an updated match gallery, while post-match it acts as a hub for in-depth reaction pieces.

"In terms of standout projects, the launch of the club Vodcast has introduced a relaxed chat show where the fans get to see the players in a different light. It is broadcast live on Facebook and our opening episode received 18,000 views. Since then it has continued to grow and develop, each stream has been widely shared and it has been positively received among the fanbase.

"The club crest rebrand in March was another social success where the return of the iconic robin was projected across the city and it was revealed exclusively through our social feeds and the club website. The website featured an exclusive interview with Chairman Jon Lansdown too, explaining the process of the crest redevelopment and the direction the club is heading in.

"It's great to see the online fanbase engaging with our content across all platforms. We're always looking at ways to improve and we firmly believe in being the go-to for the Bristol City and Bristol Sport content which our fans love.





FIELDS ONLINE | PRINT

Online

LOCAL AND NATIONAL NEWSPAPERS

While social media will undoubtedly shape the future of club and supporter engagement, traditional media outlets still have a part to play in sharing club-related news.

Local papers for instance are read by 40% of supporters for information about their Clubs. In terms of national newspapers; The Sun, Daily Mail and Guardian are the most read titles. Interestingly, The Sun's readership shows a clear preference for printed news over its online counterpart.

Which national newspaper do you usually read (on or offline) for information about your Club? The Guardian 12% 10% Daily Mail 19% Sün 5% The Telegraph 8% THE TIMES 8% Mirror 2% 2% 😢 INDEPENDENT DAILY SEXPRESS 2%

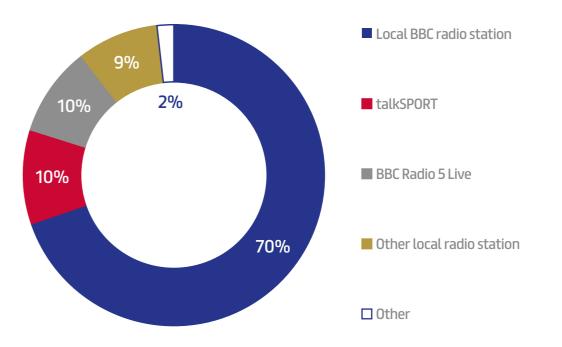
Base: Which national newspaper do you usually read (on or offline) for information about your club? n=5010

LOCAL AND NATIONAL RADIO STATIONS

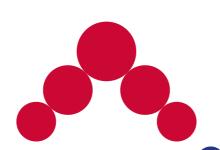
Local radio continues to be a traditional source of information that remains well used by supporters. Of the 43% of respondents who use local radio as a source, 70% trust their local BBC radio station for club-related news. In terms of national stations, only 12% of supporters listen to any national station for information regarding their club. Of the sites used, there is an even spread of listeners across talkSPORT and BBC Radio 5 Live. Both attract a higher proportion of Championship supporters, which could be explained by their wider coverage of this division.







Base: Which national or local radio station do you usually use (on or offline) for information about your club? n=13,091



2%

Print

INFORMATION DURING THE GAME

Such is the instantaneous nature of social media, that supporters are accessing content wherever and whenever they want it. This is especially true on matchdays with 58% of supporters saying they access content during the match itself.



	Total	Championship	League One	League Two
5 very easy	16%	11%	21%	30%
4	14%	11%	17%	21%
3	25%	23%	29%	29%
2	17%	19%	15%	11%
1 very difficult	27%	35%	19%	9%

of respondents access content while at the match

Base: All supporters n=26,465

The content accessed is varied; it covers anything from team sheets through to player interviews.



Teamsheets



Manager interviews



Match previews

Match reviews



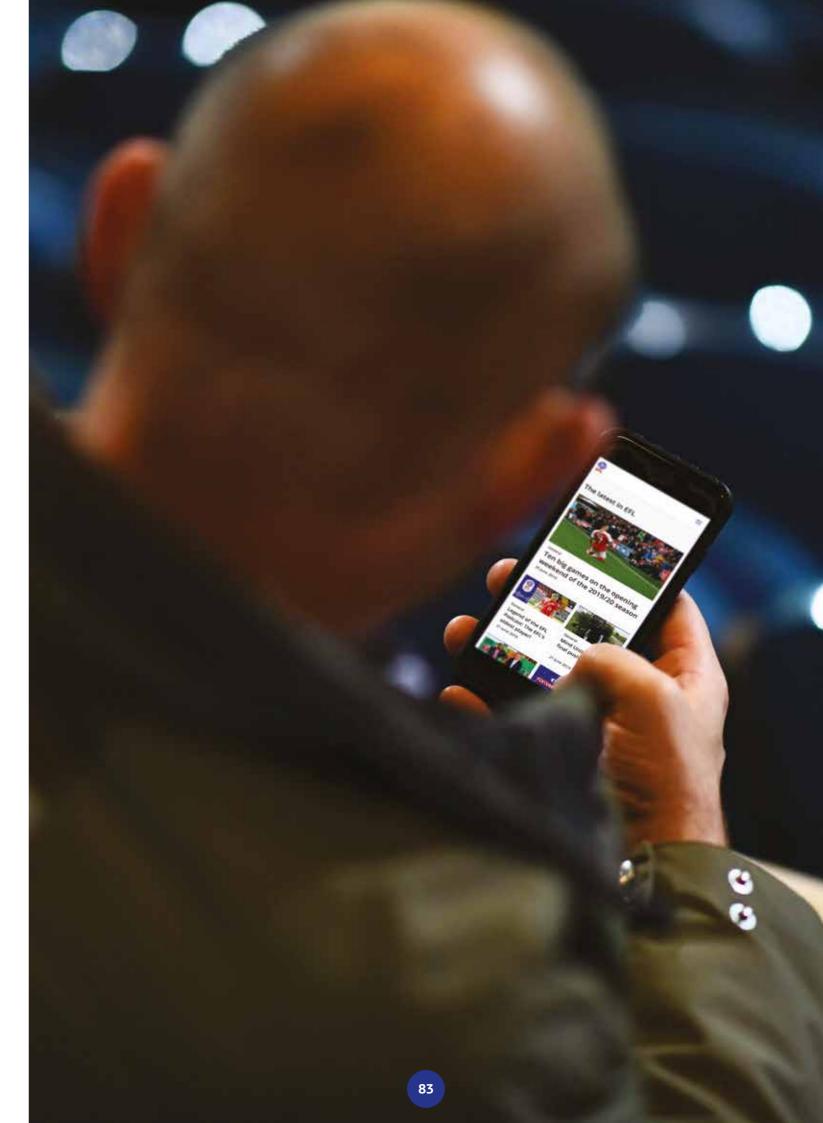
interviews

Player

Player & team stats



Base: All supporters n=26,465



PLATFORMS USED TO ACCESS CONTENT

When analysing what type of content supporters like to access during the match, it is noticeable that it shares many similarities to what is traditionally found in matchday programme publications. This could help explain why 39% of supporters said they never purchase a match day programme, as they can access the information for free in a digital format.



TOP PLATFORMS USED FOR MATCH-DAY CONTENT DURING THE MATCH

Which of the following types of content do you access online during a matchday, and on which platforms?



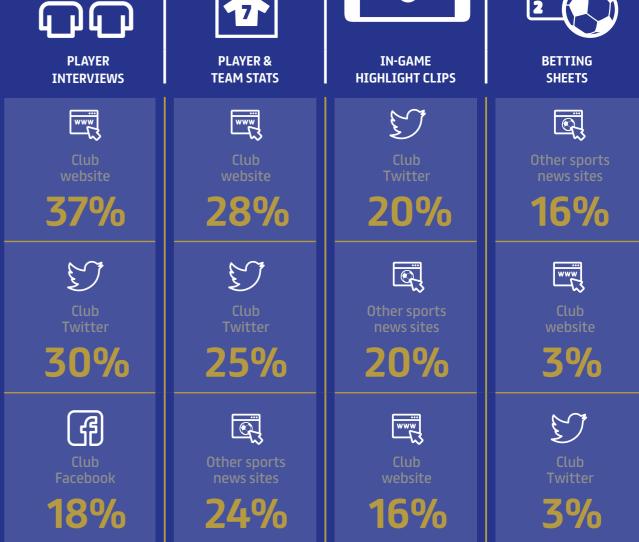
Base: Which of the following types of content do you access online during a matchday, and on which platforms? n=26,465







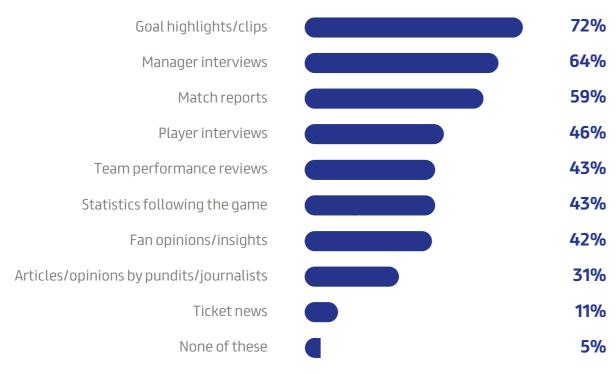




POST-MATCH CONTENT

After a match, there has always been a desire for supporters to read or swap stories about their club's performance. In 2019 there are now more opportunities than ever for fans to re-live their favourite parts of the game or to hold a post-match inquest. Supporters are predominantly looking for goal highlights, manager interviews and match reports. The desire for this content remains consistent across the divisions, highlighting the universal appeal of supporters wishing to further indulge in their club's on-field performance and the aftermath. Other types of content popular with fans are, player interviews, match statistics, team performance reviews and fan opinions / insights.





Base: After a match, which of the following club content do you look for? n=27,854



ACCESSING POST-MATCH CONTENT

In terms of where the content is accessed, 89% of supporters use at least one of the clubs' official channels to access this information, with the club website being the main source for most supporters (65%). Social media is used by 63% of supporters and the EFL official channels are used by 1 in 10 supporters.



SOURCES USED TO FIND CONTENT

Which of the following sources do you use to find Club content following a match?

CLUB CHANNELS

89%

CLUB SOCIAL MEDIA

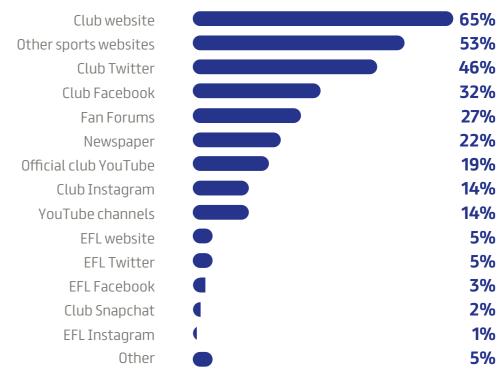


63%

EFL CHANNELS



10%



Base: Which of the following sources do you use to find club content following a match? n=26,385

EFL CHANNELS OF COMMUNICATION

Unsurprisingly, the EFL is not a destination for supporters seeking information about their Clubs. Information around competitions and other topical matters are sourced through mainstream platforms such as club websites, BBC Sport and Sky Sports. Currently only 10% of supporters use any of the EFL channels, with EFL.com, Twitter and Facebook accounts being the most commonly used.

So, in an age where digital channels have become the primary source of information. it seems clear that supporters can pick and choose what they access and when. This provides opportunities for the EFL to offer unique and relevant content that fans may not be able to readily find elsewhere.

To understand what might make supporters visit EFL.com more, we asked what areas of content would be of interest.



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

Statistics and data on player /managers/divisions

23%



More video features and exclusive interviews

19%



Historical archive of matches and records

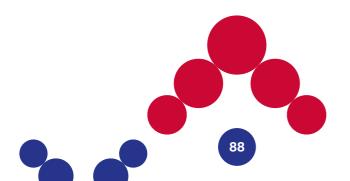
19%



EFL fantasy league

18%

All supporters n=27,854



CONCLUSION

While the desire to consume stories and content about our Clubs has always been there, the multitude of platforms now available to supporters has truly revolutionised our conversations about football.

Fans now receive and share updates on travel news, ticket information and team news before, during and after the game, often on several platforms and from different devices. These results also tell us that supporters trust their own Clubs to provide content - be it goal clips, interview soundbites, team stats or travel advice.

Meanwhile, there is still a part to play for traditional media such as local and national newspapers or radio. However, what is overwhelmingly apparent is that fans enjoy the immediacy of digital technology and use it to consume and share information and key moments among friends, family, fellow and rival supporters. Social media appears to reinforce the social connections that already existed in football.

As a result, Clubs could increase engagement with their fans by continuing to invest time and creativity in building up their on-line presence. In addition, Clubs should be encouraged to explore how they could improve connectivity within their stadia.







BROADCASTING

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SUPPORTERS SURVEY 2019

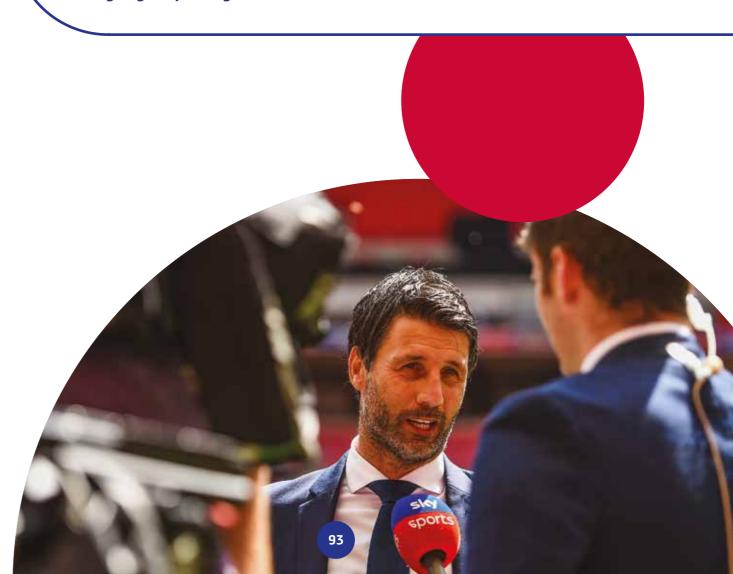
THIS CHAPTER COVERS

- Perceptions of subscription services
- Subscription to key broadcasters
- Viewing of competitions
- EFL match viewing
- Live coverage

- Access to club highlights
- Awareness and perceptions of Quest
- Streaming awareness and impact on experience
- Streaming impact on attendance

OVERVIEW

This chapter focuses on the ever-changing face of football broadcasting and asks supporters if the vast range of on-screen choices effects their matchday attendance. It looks in detail at viewing habits across the EFL, in particular how and why people watch matches and highlights packages related to their club.



5. BROADCASTING | SUPPORTERS SURVEY 2019
5. BROADCASTING | SUPPORTERS SURVEY 2019

WHAT THE RESULTS TELL US

Like every aspect of modern life, the way people watch football on the big or small screen has been hugely influenced by significant advances in technology.

Now, with live streaming and a vast array of satellite TV packages, football fans can often consume the game wherever or whenever they want.

SUBSCRIPTION SERVICES

Respondents' views on the use and cost subscription services appear to be quite complex, with some believing they could dissuade supporters from going to matches.

However, it is far from a clear picture across the fanbase. When asked how they feel about new broadcasters and services acquiring more rights to football, 60% felt it increases the cost of football. Just over half the respondents also agreed that the introduction of new broadcasters will make it more difficult to watch games.

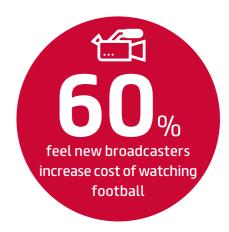


VIEWS ON SUBSCRIPTION SERVICES



	AGREE
The introduction of new broadcasters is increasing the cost of watching football	60%
The introduction of new broadcasters will make it more difficult for fans to watch games	53%
I will select a service that is right for me, even if I see fewer games	48%
I welcome new broadcasters buying rights as they bring new competition for Sky and BT	38%
I'm interested in subscriptions that allow me the flexibility to watch across multiple devices	38%
I would purchase more than one subscription if I could watch it through my existing service (i.e. watch BT Sport through a Sky subscription)	31%
I think the choice of multiple subscriptions is positive for football supporters	26%
I will purchase any/all subscription(s) so I can watch all football available	20%

Base: All supporters n=26,570

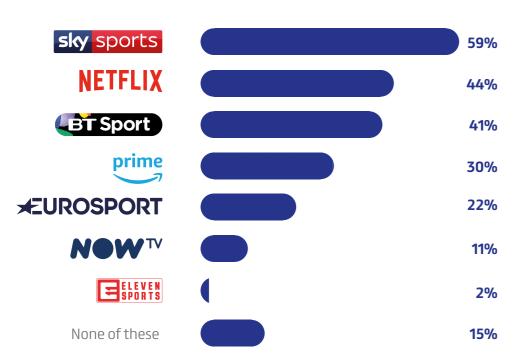


SUBSCRIPTION TO KEY BROADCASTERS

While many believe cost is a consideration when it comes to paying for access to Sky Sports, a large percentage of people do pay for Sky Sports. Nearly 60% of respondents said they currently subscribe, or have access to Sky Sports, with more than four in five of these paying for Sky Sports Football and Sky Sports Main Event packages.

At the same time, supporters also show a willingness to explore new services with only 35% saying they wouldn't welcome new broadcasters buying rights and only 37% not interested in subscriptions that give them flexibility to watch across multiple devices.





Base: All supporters n=26,570





5. BROADCASTING | SUPPORTERS SURVEY 2019 5. BROADCASTING | SUPPORTERS SURVEY 2019

VIEWING LIVE MATCHES

When focusing solely on EFL Clubs, the majority of supporters, nearly 60%, watch any EFL game they can, even if it doesn't involve their team. In addition to this, the majority of supporters agree that they like their club being on TV.

Supporters have a genuine desire to watch live football, regardless of whether or not the team they support is playing, and the appeal of the live broadcasted matches is evident throughout the survey responses. This isn't exclusive to one division; supporters are enjoying watching a vast array of teams, across the League.



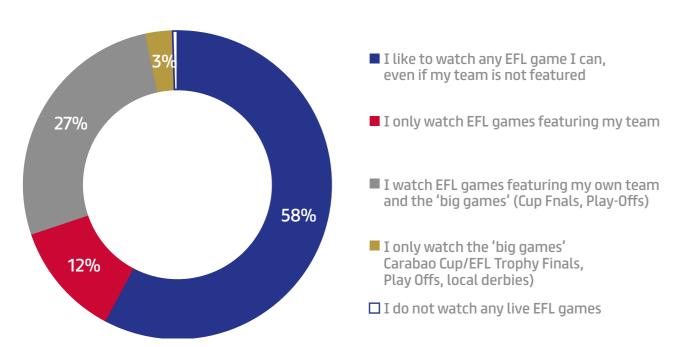
CLUB TV COVERAGE

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

	STRONGLY	SLIGHTLY	NO	SLIGHTLY	STRONGLY
	AGREE	AGREE	OPINION	DISAGREE	DISAGREE
I like the coverage and exposure the club gets when on TV	40%	26%	20%	7%	8%

Base: All supporters n=26,570

FREQUENCY OF WATCHING EFL GAMES Which of these best describes how often you watch live EFL games on Sky Sports? (asked to those who watched any EFL competitions)



Base: Asked to supporters who watched any EFL competitions n=15,102

ATTITUDES TO CLUB TV COVERAGE



	OVERALL %	CHAMPIONSHIP CLUB SUPPORTERS	LEAGUE ONE CLUB SUPPORTERS	LEAGUE TWO CLUB SUPPORTERS
Sky bet CHAMPIONSHIP EFL	92%	97%	84%	79%
Sky bet LEAGUE ONE EFL	61%	49%	90%	64%
Sky bet LEAGUE TWO EFL	46%	36%	54%	79%

Base: Supporters who have access to the relevant broadcasting channels n=15,329

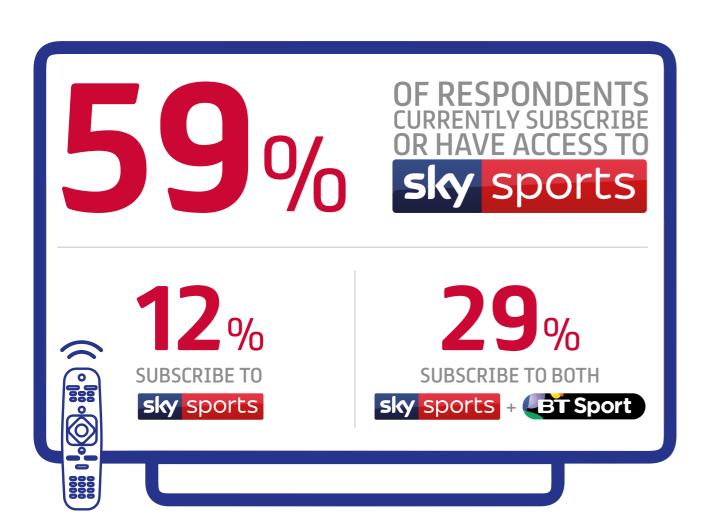


ATTITUDES TOWARDS BROADCASTERS

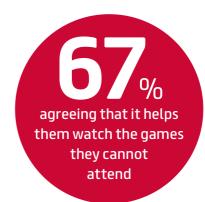
With so many viewing options and packages available to football supporters there is naturally a wide range of views among fans. Some supporters believe it adds greater competition while others believe it adds to the cost of watching football on TV.

Sky Sports remains the channel with the highest subscription, with almost 60% currently subscribing to the channel or having access to it.





Overall, supporters agree that live TV coverage is beneficial overall, with numerous advantages in terms of access to their club's matches.





This desire to see their team on TV is reflected in supporters' responses when asked how they felt when their team was selected. More than half of fans feel positive when their team is chosen for TV coverage and around the same number believe that live coverage of their team has no impact on them attending a game whatsoever.

LIVE TV COVERAGE

There is a small proportion of supporters who believe that their team is selected too frequently for live TV coverage, however this is heavily driven by a limited number of Championship Clubs and is not representative of the majority of EFL fans, especially those in League One and Two.



POSITIVE

NEGATIVE



















15%





74%



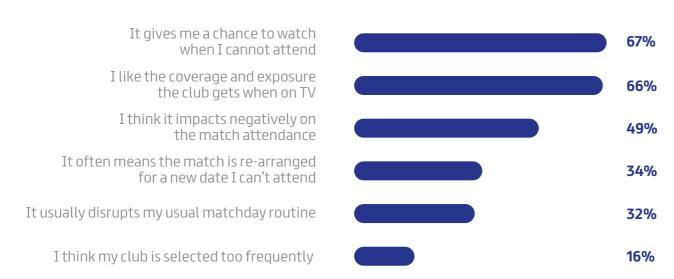
10%

Base: All supporters n=26,570

5. BROADCASTING | SUPPORTERS SURVEY 2019
5. BROADCASTING | SUPPORTERS SURVEY 2019

Broadcasting is now such an integral part of the football landscape that fixtures are frequently changed to accommodate TV selections. While supporters understandably share mixed views about this, the EFL strives to ensure disruption and inconvenience is kept to a minimum. However, when asked overall to rate how they feel when their team is selected for live TV, 56% of supporters feel positive towards this with just 19% feeling negative.





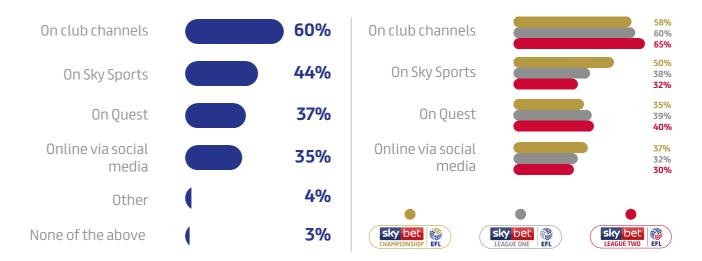
Base: All supporters n=26,570



ACCESS TO CLUBS HIGHLIGHTS

Away from live coverage, supporters have always enjoyed catching up with their team's fortunes via highlights packages. Almost all supporters watch highlights and goals with 60% watching them on their club channels. Club platforms such as website, iFollow, YouTube and Twitter are the most commonly used channels, especially for League One and Two Clubs. As highlighted earlier in the survey, we can clearly see Clubs giving supporters what they want – varied content related to their team.





Base: All supporters n=26,388

Away from their own club channels, supporters are now able to watch highlights on TV channel Quest. The audience for the 90-minute free-to-air weekly highlights package is growing, with more than a third of supporters watching it every week.

More than half of all supporters are aware of the programme and have watched it. Therefore, there are encouraging opportunities for growth during the course of Quest's partnership with the EFL.

iFOLLOW

Since 2017, the EFL has been at the cutting edge of sports broadcasting, offering supporters the chance to live stream matches. Overseas supporters have been able to stream most non-televised EFL games since the start of the 2017/18 season. This was expanded to domestic supporters at the start of the last League season.

As well as giving fans an opportunity to view the game they otherwise wouldn't have had, iFollow also provides a new, regular revenue stream for the Clubs.

are aware of the ability to stream games





The introduction of live streaming has been a real success story, particularly for international supporters who traditionally would miss out on seeing their team. When asked about the impact of iFollow on their experience as a fan, 76% rated the service positively. iFollow is perceived to offer these supporters a unique service, giving them the ability to watch their team live again. There is a similar feeling closer to home with domestic audiences also feeling the benefits of watching their team when traditionally they would have missed out.



IMPACT OF IFOLLOW ON ATTENDING MATCHES

To what extent do you agree that the availability of a fixture for live streaming would make you less likely to

	HOME	AWAY
Strongly agree	5%	18%
Slightly agree	5%	15%
No opinion	15%	24%
Slightly disagree	12%	10%
Strongly disagree	63%	34%

iFollow gives people the chance to watch their team when they otherwise wouldn't have been able to go to the game. When asked whether the availability of a fixture for live streaming would make them less likely to attend a home game, three quarters of people disagreed.

Base: All supporters n=26,465

Many supporters appear to rely on iFollow services for away games when they would otherwise have been unable to get to the match.

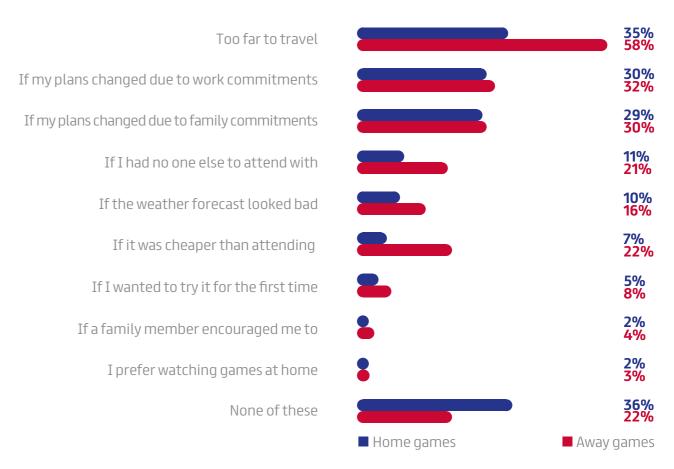












Base: Home games n=16,929 and Away games n=14,197



LUTON TOWN





Since the launch of the iFollow Hatters streaming service at the beginning of the 2017/18 season, Luton Town has embraced the opportunity and actively marketed it to their supporter base, using it as a platform to enhance fan engagement.

The club's Marketing Manager Ed Smith, explains their approach and the impact the service has had for the club and benefits passed on to their fanbase.

The club has enjoyed a sustained period of success on the pitch over the last two seasons, and this has undoubtedly contributed to a marked increase in iFollow subscriptions and match pass purchases. Improvements in the production quality, especially the introduction of the live commentary over the live stream at the beginning of the 2018/19 season, has also made the product a great deal more attractive to supporters.

"Crucially it allows all our fans to feel a part of the matchday experience, especially those supporters who are unable to regularly attend Kenilworth Road.

"The service has enabled us to extend our reach way beyond the capacity of Kenilworth Road, especially during a season which has seen home sections of the stadium reaching capacity or near-capacity for well over 50% of the games. A good example of this was an evening clash against Portsmouth in January 2019, when subscribers to our live coverage broke previous streaming records on the platform.

"This has been particularly valuable from a commercial perspective, but more importantly from an engagement point of view, where relatively few games are available to watch via broadcast networks. By our calculations we have been able to reach an additional 18,000 supporters during the course of the season who would otherwise not have been able to watch or attend a game at Kenilworth Road.

"From a financial point of view, we have seen very positive results across each of the iFollow product types, achieving a year-on-year international match pass increase of 70%, a 36% increase in UK monthly passes and overall revenues rising by 70% compared to the launch season.

"iFollow has presented an excellent opportunity to engage with our overseas supporter base, with approximately 4,000 subscriptions or match-pass interactions with the service coming from outside of the UK, in turn helping us to grow our website traffic. Visits to the 'match centre' increased by 40% year on year in 2018/19, helping us to retain visitors within our domain which offers clear marketing benefits.

"We are looking forward to working alongside the EFL and other Clubs as part of the digital working group to continue strengthening the product through new innovations and developments.



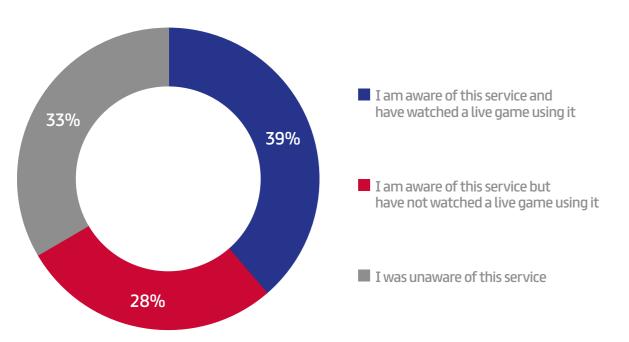
5. BROADCASTING | SUPPORTERS SURVEY 2019
5. BROADCASTING | SUPPORTERS SURVEY 2019

RED BUTTON

The range of viewing options now available to supporters is unprecedented. Not only can fans watch their team from any device or on subscription TV, but supporters of Championship Clubs can now choose which game to watch via Sky's Red Button service.

Available when multiple matches are broadcast at the same time, Red Button is being used by 39% of supporters, with this figure rising to 56% in the Championship.





Base: All supporters n=26,570



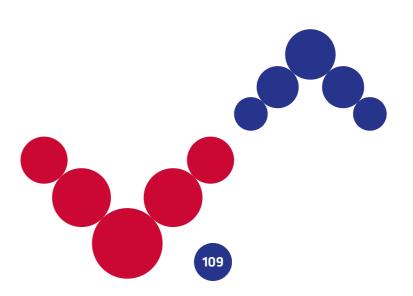


	НОМЕ	AWAY
Strongly agree	7%	22%
Slight agree	6%	15%
No opinion	14%	24%
Slightly disagree	11%	9%
Strongly disagree	62%	30%

Base: Supporters who are aware and Sky Sports subscribers n=12,256

CONCLUSION

Overall the rapidly evolving broadcasting landscape appears to be embraced by fans up and down the country. While the cost can sometimes be an important factor in deciding whether to subscribe, it appears most supporters accept that pay-for-TV and live streaming are here to stay and don't detract from the pleasure of going to the game. They are viewed as an additional opportunity to watch their team but without having a negative impact on attendances, which is a core aim of the League model.







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SUPPORTERS SURVEY 2019



EFL CUP COMPETITIONS

THIS CHAPTER COVERS

- EFL competitions attendance and importance
- Carabao Cup
- EFL Trophy

OVERVIEW

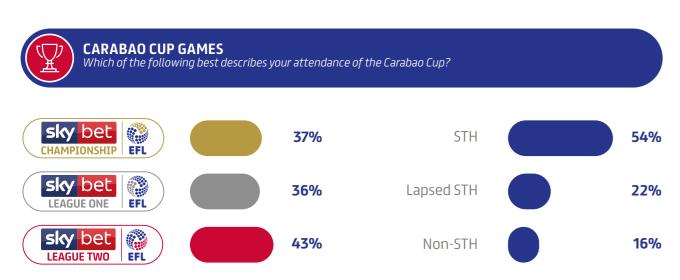
Alongside the Sky Bet Championship, Sky Bet League One and Sky Bet League Two, the EFL's two cup competitions are designed to provide the thrill of the knock-out format.

The Carabao Cup and EFL Trophy can provide supporters with a welcome distraction from the rigors of weekly league action. As in many aspects of football however, the multiple competing pressures on club squads can have a similar effect on supporters' time, budget and decision-making. This section therefore examines the role of cup competitions in the lives of club supporters and asks them how they view their place in the football calendar.



CARABAO CUP

Nearly half of supporters have intentions to attend Carabao Cup matches at some point in the season, with a similar proportion of supporters also recognising the importance of the competition. Encouragingly for the competition, 37% of respondents said they try to attend all of their club's Carabao Cup games with a further 7% having intentions to attend, should their team reach either Round Three or the Final.

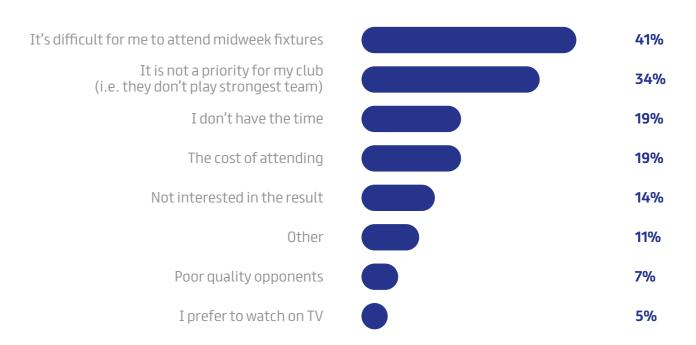


Base: All supporters n=27,854



For the supporters who do not attend any Carabao Cup games, the main reason is centred around the difficulty in attending midweek matches.





It is not a priority for my club (i.e. they don't play strongest team)

Sky bet CHAMPIONSHIP EFL

sky bet LEAGUE ONE EFL

31%

Sky bet LEAGUE TWO EFL

Base: Supporters who do not attend Carabao Cup games n=13,514

In summary the Carabao Cup's importance to supporters seems to vary from club-to-club and across the divisions. For Clubs that progress in the competition it's a real opportunity to generate additional revenue and increase their national exposure.

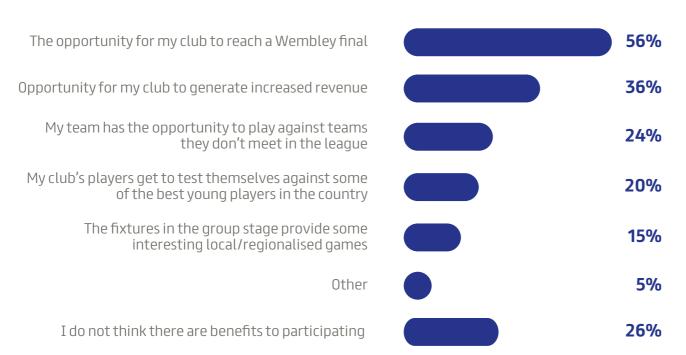
EFL TROPHY

The EFL Trophy is a knock-out competition that gives League One and Two Clubs, plus 16 Category One sides the chance to play for a winner-takes-all Final at Wembley Stadium. Its growing appeal was highlighted at the 2019 final where a competition-record crowd of 85,021 came to Wembley for a thrilling match between Portsmouth and Sunderland.

This positive perception of the EFL Trophy – which was sponsored by Checkatrade until May 2019 – was borne out in the fact the vast majority of League One and Two supporters see many overarching benefits to the competition. In particular, the opportunity for their team to play at Wembley and the additional income that a cup run generates are seen as major potential benefits. Furthermore, there is a recognition that the Clubs are able to test themselves against some of the best new talent coming through the ranks and play against teams they wouldn't normally meet in League fixtures.

While the competition is viewed positively by many, around a quarter of supporters don't see any of these benefits. As a result Clubs should take the opportunity to educate fans on the potential impact of having a good trophy run. By increasing awareness of the EFL's ongoing 'Every Game Matters' campaign, it's hoped that more supporters will be encouraged to embrace every match and attend further games in the competition.





Base: Those who follow League One and Two Clubs n=11,139



FACTFILE - EVERY GAME MATTERS

- The EFL actively promotes matchday attendance throughout the course of the EFL Trophy competition, under the 'Every Game Matters' banner.
- The EFL and Clubs work together to increase fan engagement and attendances by stressing that teams need our support regardless of the opposition and when and where the match is held.
- Attendances over the course of the 2018/19 season saw an uplift, culminating with a competition record-breaking crowd of 85,021 for the Final between Portsmouth and Sunderland.
- Overall, attendances increased by 32% in comparison to 2017/18, with cumulative figures reaching almost 309,000, at an average of 2,433 per game.







Winning the 2018 EFL Trophy at Wembley was one of the greatest moments in Lincoln City's history. Lifelong Imps supporter Jonathan Battersby reflects on a cup run and showpiece final that will live long in the memory.

I thought the EFL Trophy was a competition worth taking seriously, and so it proved. It came at a good time for City, newly promoted, a chance to do well and to have a realistic crack at a Wembley final.

"We weren't to be disappointed, and the Lincoln public backed City in numbers right from the start and we possibly saw some of the best games of the season during these matches, particularly at home to Peterborough in the Northern Final, and then of course, the Wembley decider itself.

"I was happy with the format as it gave kids from Premier League teams valuable experience playing under pressure in front of good crowds, and the money donated by them for their inclusion certainly helped Lincoln City with their overall financial ambitions.

"The Final itself was amazing. It was incredible to see 30,000 Lincolnians all gathered together. I never thought that possible in my lifetime, that's for sure.

"I sat next to some of my late Dad's family - long since exiled from Lincoln - but still followers from afar. It had been over 40 years since we'd all sat together, huddled in the old South Park Stand at Sincil Bank, and now we were watching the team walk out at Wembley. I'll readily admit we had a few tears in our eyes. That's the power of the football family.



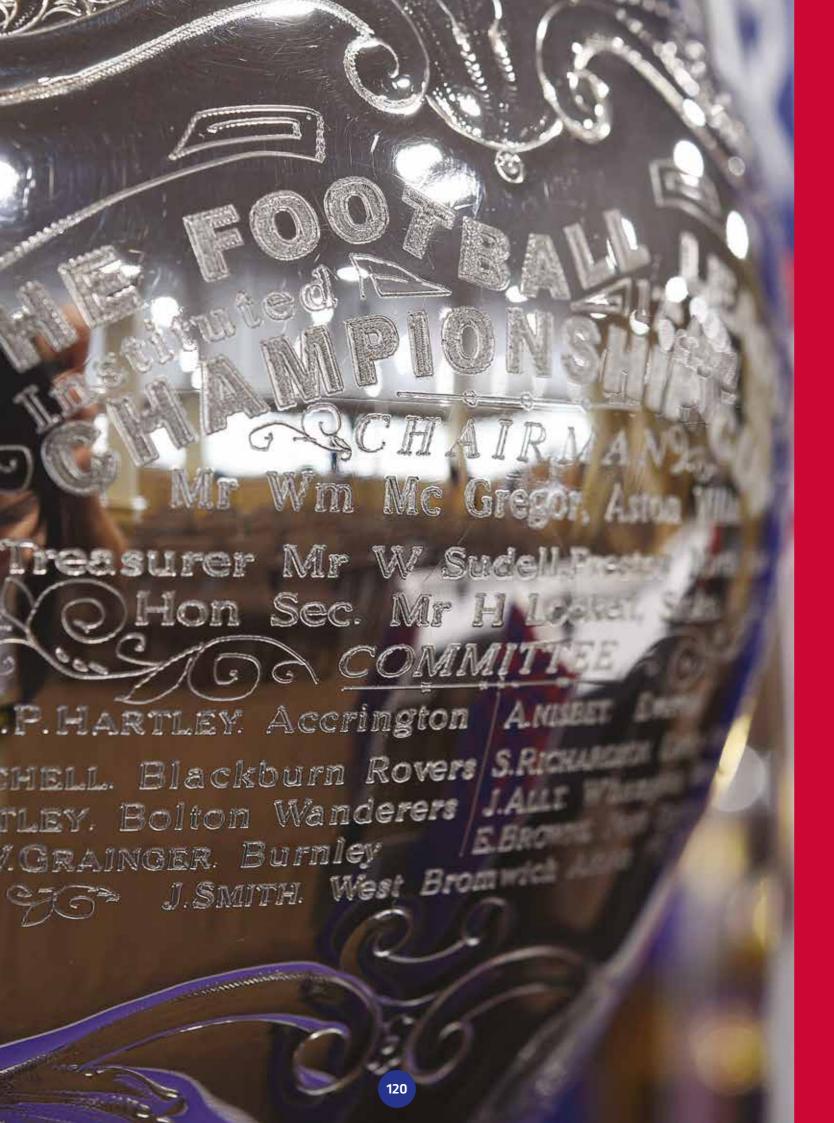






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SUPPORTERS SURVEY 2019



THE EFL, POLICIES & PERCEPTIONS

THIS CHAPTER COVERS

- Perceptions of EFL and its role
- Main functions and priorities of the EFL
- Importance of key issues
- Importance of home grown players
- England team
- Sponsorship

OVERVIEW

The Supporters Survey provided the EFL with a great opportunity to consult supporters across a wide range of important issues within the modern game. This in turn will help to get a better understanding of their views which may assist in future planning and policy making.

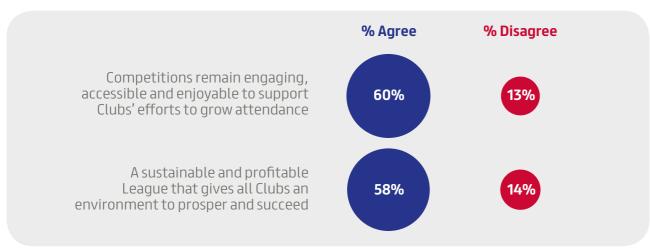


THE EFL

Supporters were asked to provide their opinions on the role of the EFL, its key priorities and perceptions of how successfully it ran its competitions. Over half of all respondents agree that the EFL's main core functions are to ensure its competitions remain engaging, accessible and enjoyable for fans, whilst also broadly agreeing that the EFL should ensure the League remains sustainable and profitable. Supporters also placed these two functions at the top of their list of priorities for the EFL. A third of respondents believe the EFL should prioritise the development of young players through the Academy system, and assist the overall development of the game alongside the Football Association and Premier League.

MAIN PRIORITIES OF THE EFL When thinking about the main function

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.



Base: All supporters n=27,853

There are some noticeable differences in opinion based on age range of respondents, with younger supporters (aged U35) more likely to recognise the importance of EFL around promoting inclusivity and accessibility. One of the EFL's key responsibilities is helping to promote inclusivity and accessibility with the game and it remains committed to working with its fellow stakeholders, including the FA and Kick It Out, to ensure football remains a game for all.



PERCEPTIONS OF THE EFL

As the competition organiser and administrator of League rules, supporters look to the EFL for leadership across a range of areas. More than a third of supporters agree that it does a good job in administering its competitions and has the interests of football supporters at heart whilst less than 15% disagreed.



	STRONGLY AGREE	SLIGHTLY AGREE	NO OPINION
Helps promote inclusivity within the game	13%	31%	43%
Helps promote accessibility within the game	11%	30%	45%
Does a good job in administering its Competitions	9%	28%	43%
Is an important influencer in the development of the game in England	12%	24%	41%
Helps its Clubs to make a positive impact in their communities	10%	25%	47%
Has the interests of football supporters at heart	8%	21%	35%
Is helping to develop future home grown players	8%	20%	42%
Plays a key role in working to establish fair representation of BAME coaches or managers	8%	19%	55%
Makes innovative and progressive changes to benefit the game	7%	16%	46%

MAIN PRIORITIES FOR THE EFL

In terms of the priorities for the EFL moving forward, supporters would like to see it focus its activity on maintaining a healthy competition, where Clubs are both sustainable and profitable. They want their Clubs to be financially competitive and to have equal chances of success both on and off the pitch.



To ensure a sustainable and profitable League that gives all Clubs an environment to prosper and succeed	48%
To successfully administer and manage the League and its competitions	45%
To develop young players through the Academy system	36%
To assist development of the game alongside the FA and Premier League	35%
To support growth of attendances across all EFL Clubs	33%
To provide guidance and support, ensuring all Clubs operate within EFL regulations	25%
To create first team playing opportunities for young players	23%
To develop Regulations that actively demonstrate robust and effective governance	16%
To grow and cultivate club fanbases domestically	12%
To grow and cultivate club fanbases internationally	4%

Base: All supporters n=27,854

HOME GROWN PLAYERS

When focussing on home grown players and the importance of Clubs investing in the development of the next generation of footballers, on the whole, supporters recognise the importance of nurturing new talent. However, when rating their club's track record in developing players, there is some room for improvement in bridging the gap between what fans want and what Clubs deliver. At present, the majority of fans (63%) rate producing home grown players as very important, yet only a third of supporters actually rate their club's performance as very good. The importance of producing home grown players is reflected in supporters' reasons for wanting progress in this area ranging from:



IMPORTANCE OF PRODUCING HOME GROWN PLAYERS

Please explain why you feel it is important for your Club to develop home grown players?



Good for the national team



For the future of the club and football



For the Club to be financially competitive and sustainable



Fans love a local lad "one of our own" and added sense of pride



Preference to foreign players within the team – young local players care more and should be given the opportunity

IMPORTANCE VS RATING ON HOME GROWN PLAYERS • 5 - very important How important is it that your club produces home grown players? 63% 23% 13% 1% • Very good • Good • Neutral • Poor • Very poor How do you rate your club's track record in developing/nurturing home grown players?

HOME GROWN PLAYERS



FACTFILE - YOUTH DEVELOPMENT

- One of the EFL's key strategic aims is to help provide more playing opportunities for young home grown players.
- The EFL invests £100 million a year into Youth Development
- 45% of EFL scholars gain a professional contract
- 20 out of the 23 players in the England squad had either come through EFL academies, made their senior debuts in EFL or played on-loan in the EFL
- 25% of registered players at EFL Clubs are U21 and English





As a former professional footballer, Dave Wetherall signed for his hometown club Sheffield Wednesday as a schoolboy player before being transferred to Leeds United in 1989, going on to establish his first team professional career at both Leeds United and Bradford City. Now the EFL's Youth Development Director, he is all too aware of the need for Clubs to focus on nurturing young players coming through the Academy system. Having been in the role for eight years, he has overseen the progression and development of the Academy system and the work of Clubs in this area across the EFL.

Dave, tell us your views on the importance of youth development and Clubs having the necessary framework in place to enable young players to progress.

The promotion of young home grown players is one of the core aims of the EFL and its Clubs, so it's our job to help and support the Clubs to develop talented young footballers and provide opportunities for these players to develop and flourish. In order to achieve this, the Elite Performance Plan, which has shaped the English professional game's Youth Development System since 2012, means EFL Academies have to meet really high demands relating to the number of staff, their qualifications, the quality of the facilities and the overall operating procedures of the Academy.

It must be a challenge to oversee the development of young players across 72 Clubs spread out all over the country. How does the EFL manage this?

The EFL has a dedicated Youth Development department which has a central base in Preston with a team of Regional Managers located all over the country. The department's main focus is to assist, guide, monitor and support Clubs in all aspects of their Academy operations. League Football Education (LFE) are also based in Preston and primarily facilitate and deliver the formal education programme to Apprentice players. LFE also provide an array of training through the extensive Life Skills programmes.

In recent seasons the successes of the English national team across various age groups has arguably shown that the focus on youth development in this country is working. Do you think this has provided added incentives for EFL Clubs?

In assisting and supporting Clubs with their Academy programmes we see our role as further helping to cement the EFL's position as a developer of young players. Clubs invest significant resources in working with young players, but to see them come through the ranks and play for the first team, or even to make a move to a higher level, can be just reward.

The League are helping to further incentivise player development through such initiatives as the EFL Futures programme, which rewards Clubs to the tune of £1 million per season for providing playing opportunities to U21 English qualified players. In addition the EFL has also developed the EFL Trophy format to provide opportunities for U21 Academy teams to experience competing with experienced professionals.

The EFL also established the Club Developed Player criteria, where a player who has been developed at a club for a year before the end of the U19 season must, for a club to field a full complement of substitutes, be named on each first team team-sheet. This criteria establishes a definitive pathway from Academy football to the first team environment and is assisting with providing playing opportunities for young players which can help them to maximise their potential.

So yes, we are very much driven to continue to support our Clubs in this area.

In terms of overall player development, what kind of off-the-pitch support do these young footballers receive?

Well, there is of course a recognition that not all Academy players will go on to a long and successful professional football career so, in addition to focussing on the development of the player, there is a need to focus on the overall development of the individual. The importance of education has been emphasised through a substantial increase in Clubs responsibilities in this area in recent times.

Additionally, the LFE 'Life Skills' scheme provides training, education and advice on matters including emotional well-being, equality and diversity, finance, heart and sexual health awareness, social media, talent transfer, lifestyle and education on key subjects such as gambling, alcohol and drugs, psychology, resilience and personal development. The Academy system is not just developing the player – it is developing and educating the young person."



ENGLAND TEAM

Base: All supporters n=27,854

Like most football supporters, fans in the EFL also take an interest in their national team, England. When asked about the performance and success of England, two thirds of respondents said it was important or very important to them. This figure perhaps reflects the success of the national team at the 2018 FIFA World Cup, which finished just before the start of the 2018/19 domestic campaign.



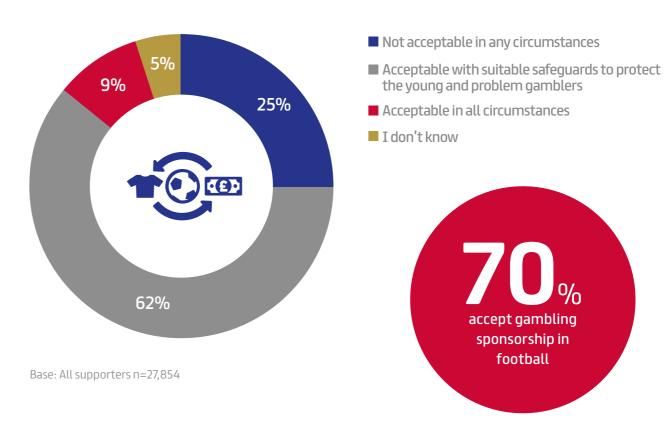
SPONSORSHIP BY GAMBLING COMPANIES

Sponsorship has been a feature of the modern game for some time, but the revenue it now brings to Clubs means it now plays a larger role in supporting football. Key among the multitude of sponsors are betting companies. When asked about gambling companies involvement in the game, 71% of respondents believed it was acceptable, with 62% stating it was acceptable with suitable safeguards to protect the young and problem gamblers. A quarter of fans said sponsorship by gambling companies was not acceptable in any circumstances.

Meanwhile exactly half of those who have gambled online say they used Sky Bet, with 28% saying they only used that platform.

Like many aspects of a football supporter's life, the way they place bets has changed fundamentally over the last decade. Whereas previous generations gambled on the pools or physically went to the bookmakers, fans now are much more likely to gamble online.





This is reflected in the fact that 46% of supporters have placed a bet online in the last 12 months. Of that figure the most common frequency – once a week – accounts for 13% of those surveyed. While most people seem to have a healthy relationship with betting, there appears to be a tiny minority (2%) that place a bet every day. This is why the EFL and its Clubs continue to encourage responsible gambling.

For a small proportion of supporters, they believe that these types of companies are not acceptable as sponsors. There is a clear uplift among older supporters, especially those aged 65 years+ in terms of the inappropriateness of gambling companies.



Base: All supporters n=27,854

FACTFILE - RESPONSIBLE GAMBLING

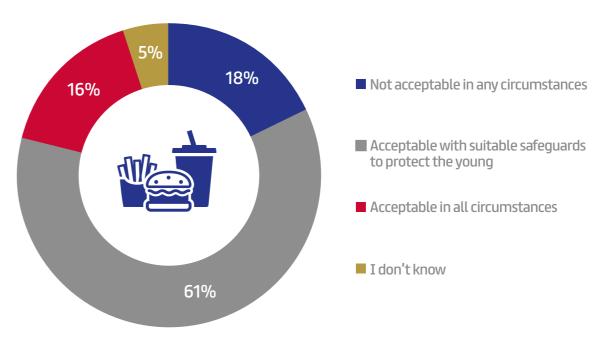
- Responsible Gambling is at the heart of the EFL's partnership with Sky Bet.

 Over a five-year period £1million has been invested to educate EFl Clubs via the responsible gambling campaign.
- Sky Bet and the EFL committed to deliver training to players and staff at all 72 Clubs during the 2018/19 season.
- The training included sessions on:
 - Understanding the potential risks associated with gambling
 - Rules regarding betting integrity
 - How to look out for signs of potential harm in their teammates

FOOD AND DRINK SPONSORSHIP

A similar picture emerges when asked about sponsorship from firms that make food that is high in fat, salt, sugar and/or caffeine. Again, just under two thirds believe it's acceptable with suitable safeguards to protect the young, while 18% say it is not acceptable in any circumstances.





Base: All supporters n=27,854

CONCLUSION

Despite covering a wide range of subjects and issues, the results in this section are consistently clear – supporters expect the EFL and its Clubs to uphold the integrity of the game. Whether related to developing young players or gambling and sponsorship deals, supporters appear to want the relevant football authorities to provide ethical leadership while increasing sustainability across the game.

The survey suggests the EFL is broadly focussing on the right areas - sustainability, financial stability, accessibility and enjoyment for fans - but there seems to be a desire for more investment in young, home grown players. As a result, youth development remains one of the key strategic aims of the EFL.







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