

State of Play 2018
Sport UK

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Foreword

Sport is constantly reinventing itself. From using video technology to change a referee’s penalty decision or review an umpire’s LBW call, to redesigning formats to attract a new legion of live sports fans growing up in an experience economy.

Change has been slower off the field, though, as this report demonstrates. Fans have been slow to flock to women’s sport, as attendance plateaus over three years. How can that be when, for England in their respective World Cups at least, the women cricketers are current Champions, the rugby players were runners up, and the footballers won their third-place play off? All better than the men.

Some things never change, they say, like family. When it comes to football, my own nine-year-old daughter, a Londoner, supports Liverpool, because I do. I support them because of my uncles. They do because of my grandfather. But that too may not be the norm any more.

For me, the very idea of switching teams is unthinkable – is nothing sacred? But the data is beginning to show that fans already do consider jettisoning their idols if things are going badly. Locality is also beginning to threaten loyalty amongst fans. Will this matter to the next generation? Could I even end up being the dad of a Spurs fan?

Whatever happens, it will be fascinating to continue watching.

Matt Barbet
Broadcaster





Introduction

Welcome to Ticketmaster's State of Play 2018 report; a deep dive into fans' attitudes towards sport in the United Kingdom.

At Ticketmaster, we have worked in the sporting field for well over 30 years. When it comes to ticketing a sporting event we are the experts. Over the years, we have worked with everything from Premiership football, to test cricket, to governing bodies and some of the world's greatest events, including the London 2012 Olympic and Paralympic Games. Our team is full of huge sports fans (including me), which makes us all feel pretty lucky coming to work every day.

This report draws on a nationally representative study of over 12,000 UK respondents and 6,000 sport fans, and includes transactional data from our database of over one million customers. We've also weaved in data from a number of clubs and governing bodies from across the UK, who we're delighted have chosen to partner with us – thanks to all involved amongst our amazing clients.

What results is a comprehensive overview of what fans really think about the world of UK sport. To give it some focus, we have looked at the country's three best attended sports: football, cricket and rugby union. You will find some overarching statistics on each of these genres of sport, and the nuanced differences between their respective fans – as well as the crossover.

On the following pages you will learn that sport is a family affair and the real reason fans support the teams they do (p. 27), that loyalty may be waning (p. 28), and that, as a match day beverage, Bovril is most popular amongst Londoners (p. 55).

Football fans go to matches with their sons, rugby prefer their other half, while cricket fans bring the whole family (p. 53). Early exposure to sport breeds stronger connections and longer lasting support (p. 25), younger fans are more likely to be on board

with sponsors (p. 75), and scheduling matches on weekdays may increase attendance (p. 20).

Disappointingly, fans are still not as engaged with women's sports. The demand is there though, with a sizeable portion of sports fans saying they would watch women's sports if it was made more readily available by broadcasters. Also, it's the younger fans displaying much of the positivity, which bodes well for the future. Most fans also agree that clubs, venues and the media must do more to improve the promotion of women's sports across the board (p. 62).

Sport is so much to so many. To some it's entertainment, to others it's family, to many it's a bit of fun – but to some, it's life. We hope you learn something here and we'd love to hear your stories too.

You can always contact us at:
tmsportsales@ticketmaster.co.uk

Adam Newsam
Managing Director, Ticketmaster Sport



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Chapter 1: Sport in the UK

“Scotland beating England in 1990 Five Nations – the first live match I had ever been to.” Male, 44, rugby

“England vs France 1966 World Cup on a black and white TV.” Male, 61, football

“England winning The Ashes in 1985.” Female, 42, cricket

Sport attendance in the UK

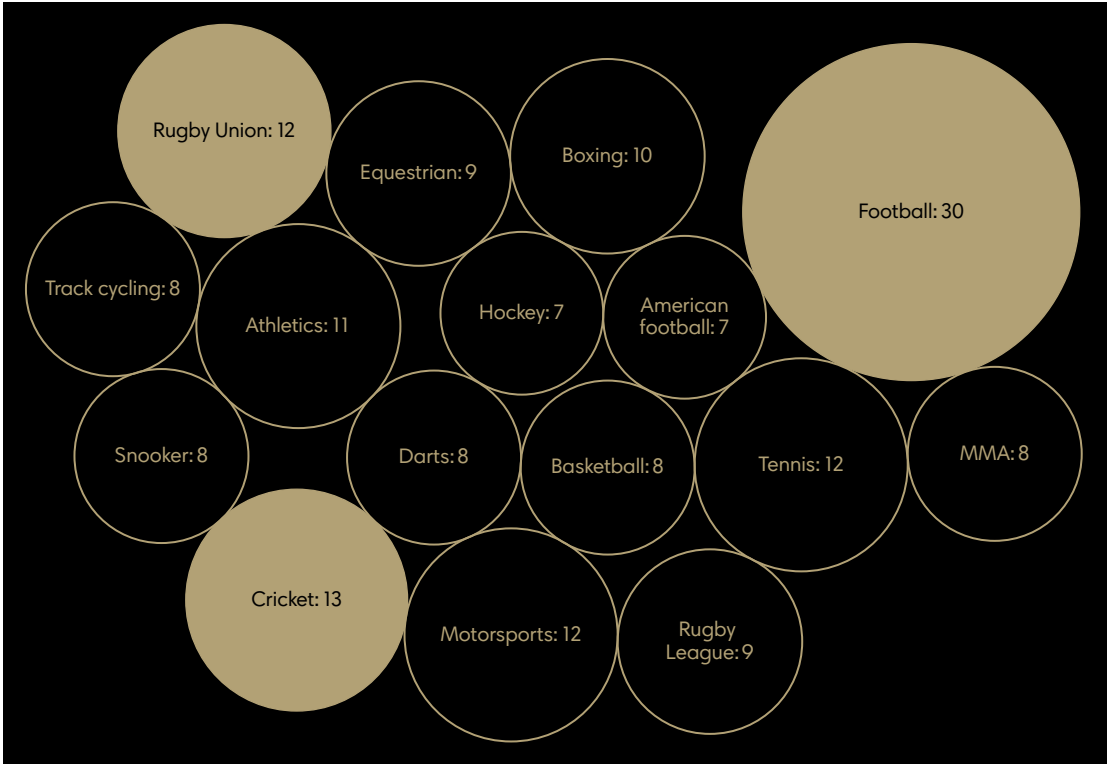
Over two in five of the UK population have been to at least one sports event in the last three years, with football, cricket and rugby the most attended. In fact 30% of the UK population went to at least one football match, 13% cricket, and 12% rugby.

Tennis and motorsports follow, with 12% attending at least one. On the flip side, just 7% of the UK population went to a hockey match or American football game.

Ticketmaster purchasers

Ticketmaster’s transactional data shows the number of purchasers buying rugby tickets has consistently increased since 2012, reaching its highest level in 2017. The number of football purchasers has stayed consistent over the years.

Sport attendance in the last three years (%)
Base: 12,114 surveyed; football: 3,584; cricket: 1,615; rugby: 1,479



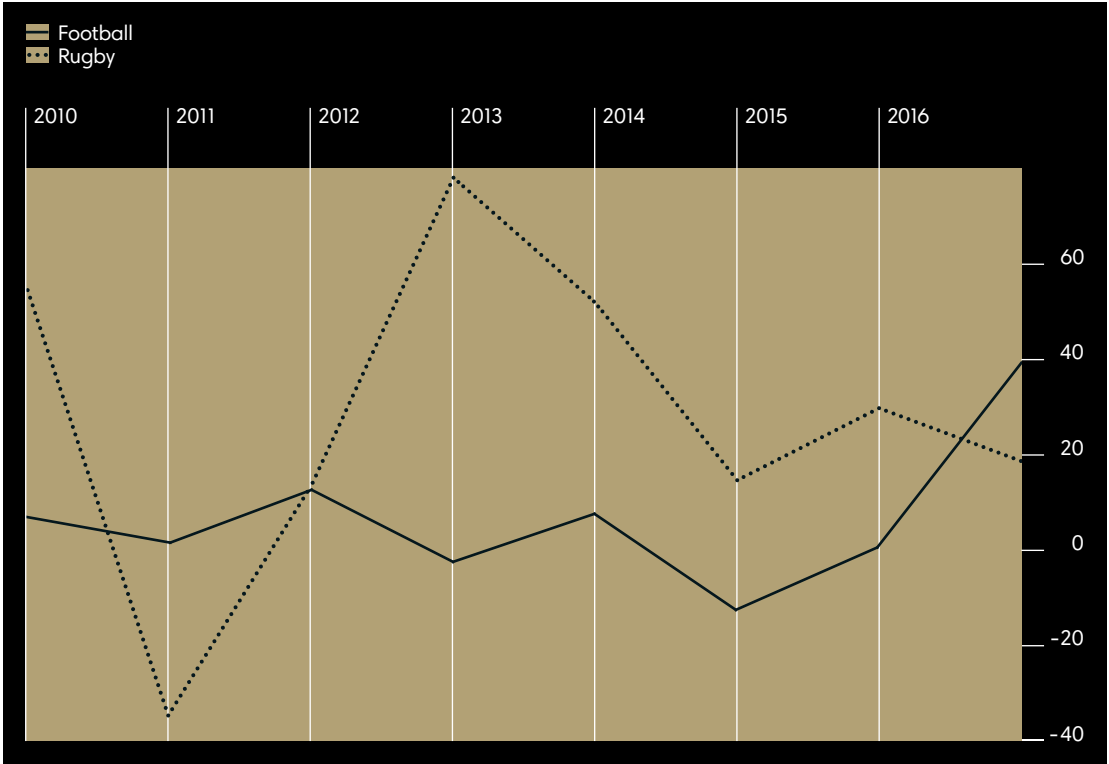
Attendance overlap

Of the three sports we’re focusing on, football has the most dedicated fans with close to half (47%) attending only football matches in the past three years (though they might go to other sports events outside of rugby or cricket). In contrast, only 7% of rugby fans and 6% of cricket fans attend their sport exclusively; they are more likely to go to their respective sport alongside football.

This trend is seen for other genres too, with rugby and cricket fans much more likely to attend other sporting events, such as tennis and hockey, as well as other live events. Cricket fans are much more likely to overlap with arts and theatre events. Rugby fans are more likely to go to comedy events.

Football fans, on the other hand, are the least likely to attend a comedy, festival, arts and theatre or concert event.

Ticketmaster purchasers for rugby and football – year on year growth (%)
Base (purchasers since 2009): football: 403,669; rugby: 1,002,106. Note: no year on year data available for cricket purchasers

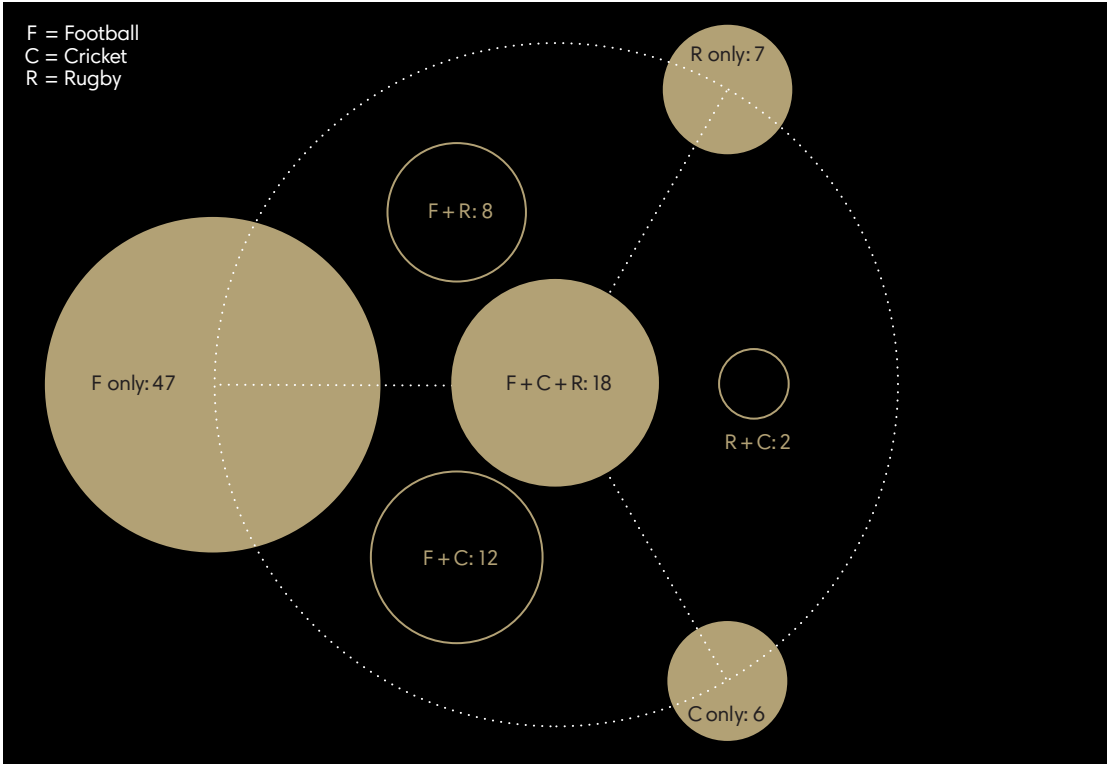


Ticketmaster transactional data shows further evidence of this, with rugby purchasers much more likely to buy tickets for other sporting events, particularly for NFL and cycling.

Top five sports attended, excluding football, rugby union and cricket (%):

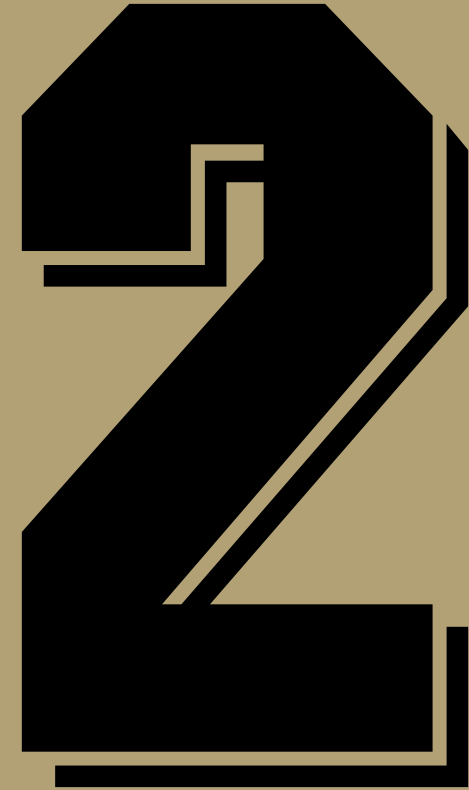
Football		Cricket		Rugby Union	
Tennis	38	Tennis	51	Rugby League	52
Athletics	35	Athletics	49	Tennis	50
Motorsports	34	Rugby League	45	Motorsports	49
Boxing	30	Motorsports	45	Athletics	49
Darts	28	Darts	41	Boxing	43

Attendance overlap (%)
Base (fans): football: 3,584; cricket: 1,615; rugby: 1,479





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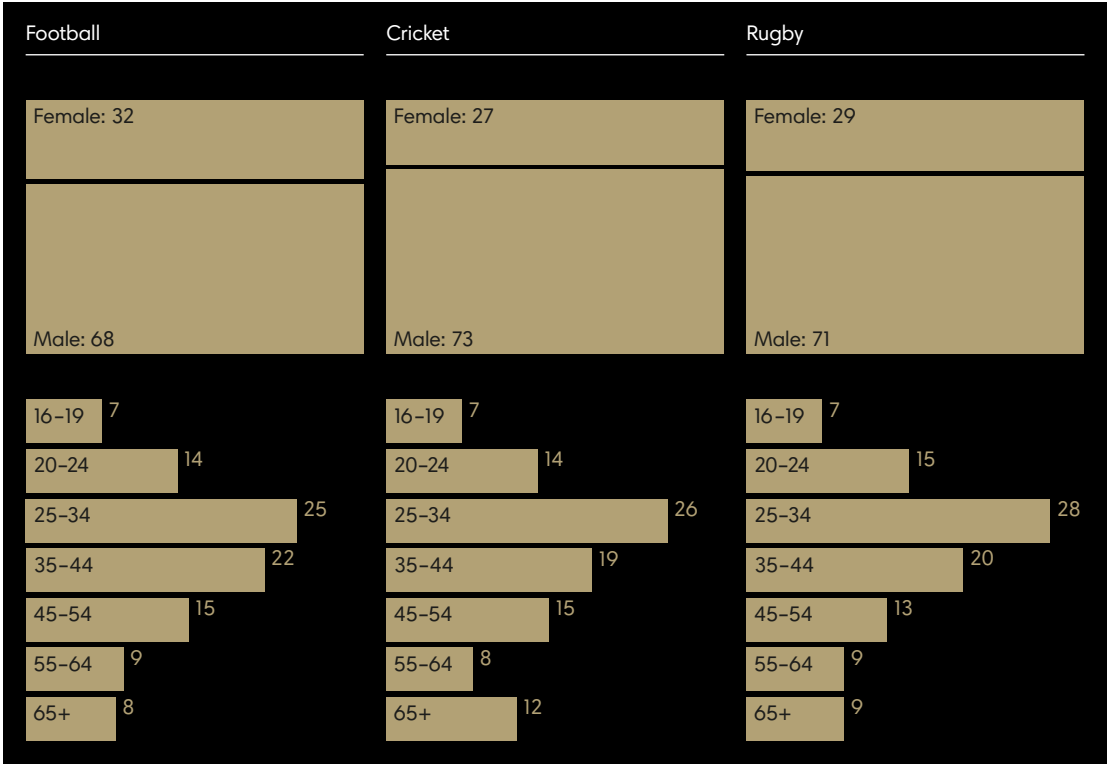
Chapter 2: Audience

"We live on a tight budget, so buying tickets is just not an option for us, even though I would love to go to a lot more games." Female, 54, rugby

Age and gender

The average attendee age for all three sports is around 35. The average age of male fans is higher than the average age of female fans. At least two in three fans are male. Football has the highest proportion of females attending and cricket has the least. Ticketmaster transactional data, however, shows average ticket purchasers to be in their 40s (slightly older than those who are going). Though cricket purchasers are, on average, younger than football or rugby. Ticket purchasers for rugby are also much more likely to be female than purchasers for football and cricket, and in comparison to the survey data. This might suggest that women are more likely to buy than attend.

Audience profile: age and gender (%)
Base (fans): football: 3,584; cricket: 1,615; rugby: 1,479





Audience profile: region (%)
Base (fans): football: 3,584; cricket: 1,615; rugby: 1,479

Region
The likelihood to go to a football match is highest in Northern Ireland, rugby in Wales and cricket in England, though the majority of fans for all three sports come from London. Northern Ireland attracts the youngest female crowd for all sports, with an average age of 28, whereas London has the youngest male crowd (31). The Southeast and Southwest have the oldest female crowd for all sports (42). Scotland has the oldest male football and rugby crowd (44) and the Southwest has the oldest male cricket crowd (47).

Sociographics
Football is more likely to attract single fans than other sports. Rugby has the highest proportion of married fans and cricket has the highest proportion of divorcees and retirees, which could be because it is the sport with the oldest crowd. Despite the highest proportion of singletons, football fans are the least likely to be using a dating app. Rugby fans have a slightly higher average household income compared to cricket and football. The more matches attended, the higher the household income. Football fans under 30 are the least adoptive of technology, being less likely to be regular users of social media and to use TV sport subscriptions.



Matches attended

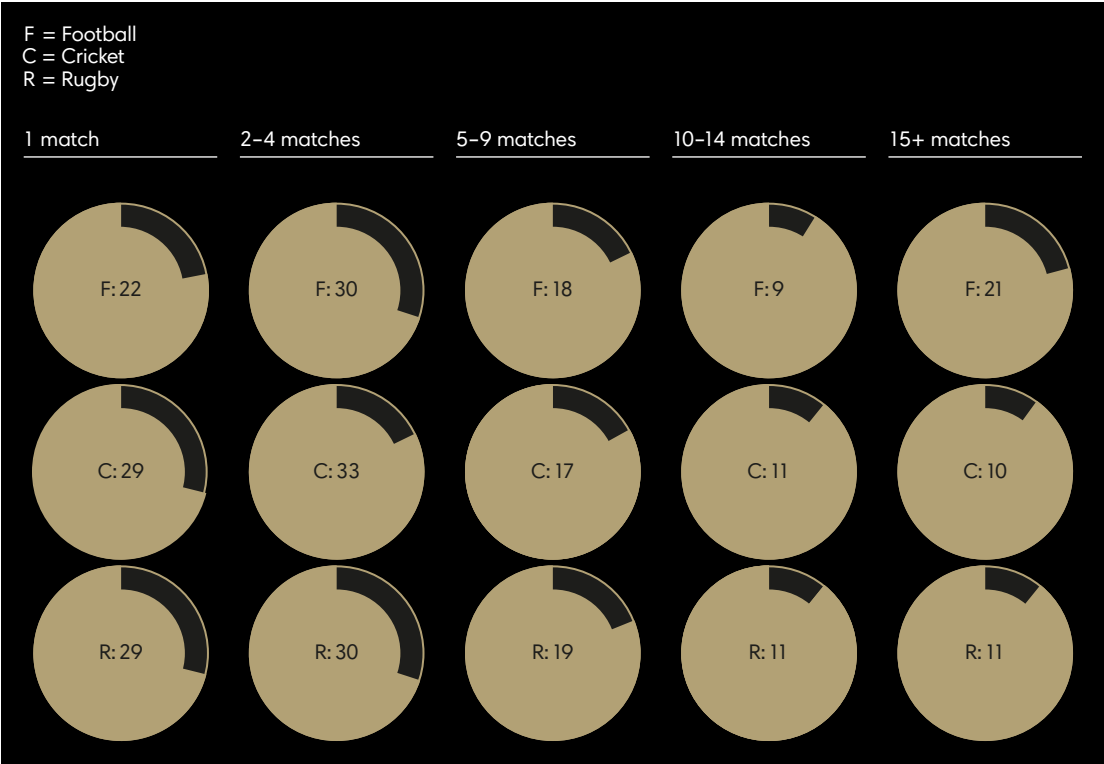
Football fans are twice more likely to have attended more than 15 matches in the past year compared to rugby and cricket fans, who are more likely to have attended one match in the same timeframe. This is likely due to the much higher propensity of football fans to own season tickets.

Football fans that go to 15+ matches are significantly more likely to be over the age of 45, and from the north of England or Scotland. They are more likely to be retired, and to be regular users of TV sport subscriptions.

Cricket fans who go to matches more regularly are more likely to be under the age of 35, and also to be regular users of TV sport subscriptions. They are more likely to be users of Tinder and social media platforms, such as Snapchat and Instagram.

There is little difference between rugby fans who go to multiple matches and those that attend just a few.

Number of matches attended in past three years (%)
Base (fans): football: 3,584; cricket: 1,615; rugby: 1,479



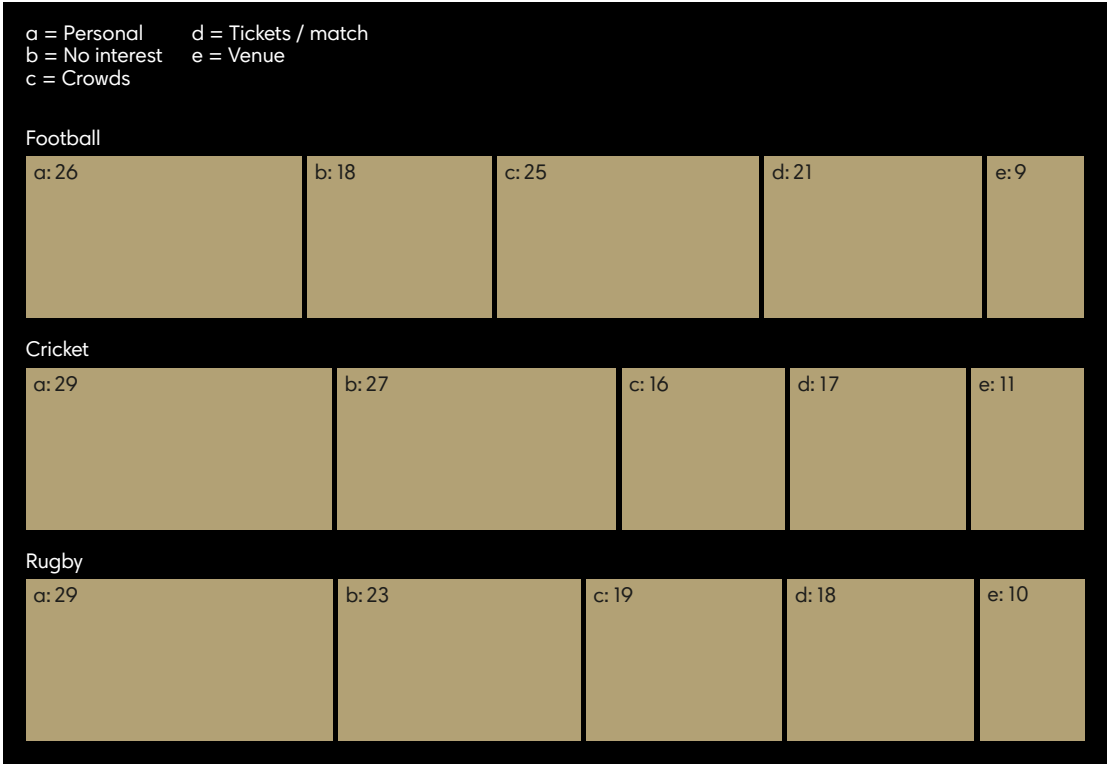
Those who rate themselves as superfans of the sport are twice more likely to have been to 15+ matches in the past three years. However, 15% of self-identified rugby and cricket superfans and 5% of football superfans have actually not attended a live match in the past three years, mostly citing expensive or sold out tickets as reasons.

Barriers to attending

Overall, personal reasons, such as not having anyone to go with, or not finding out about matches in time, are the biggest barriers to attendance. Lack of interest in the sport is the second largest barrier, with the exception of those who did not go to any football matches, where the crowds are the largest factor.

Younger fans who have not attended a sports event, are much more likely to find crowds and / or spectator behaviour a barrier than their older

Barriers for non-attendees (%)
Base (non-attendees): football: 8,530; cricket: 10,499; rugby: 10,635



Motivators for non-attendees (%)
Base (non-attendees):
football: 8,530; cricket:
10,499; rugby: 10,635

counterparts. They are also more likely to not attend because they don't know the rules, whereas older fans are more likely to not go because they don't have the time. Male fans are more put off by ticket prices and inconvenient venue location, while female fans are more likely to feel out of place or intimidated by sport crowds.

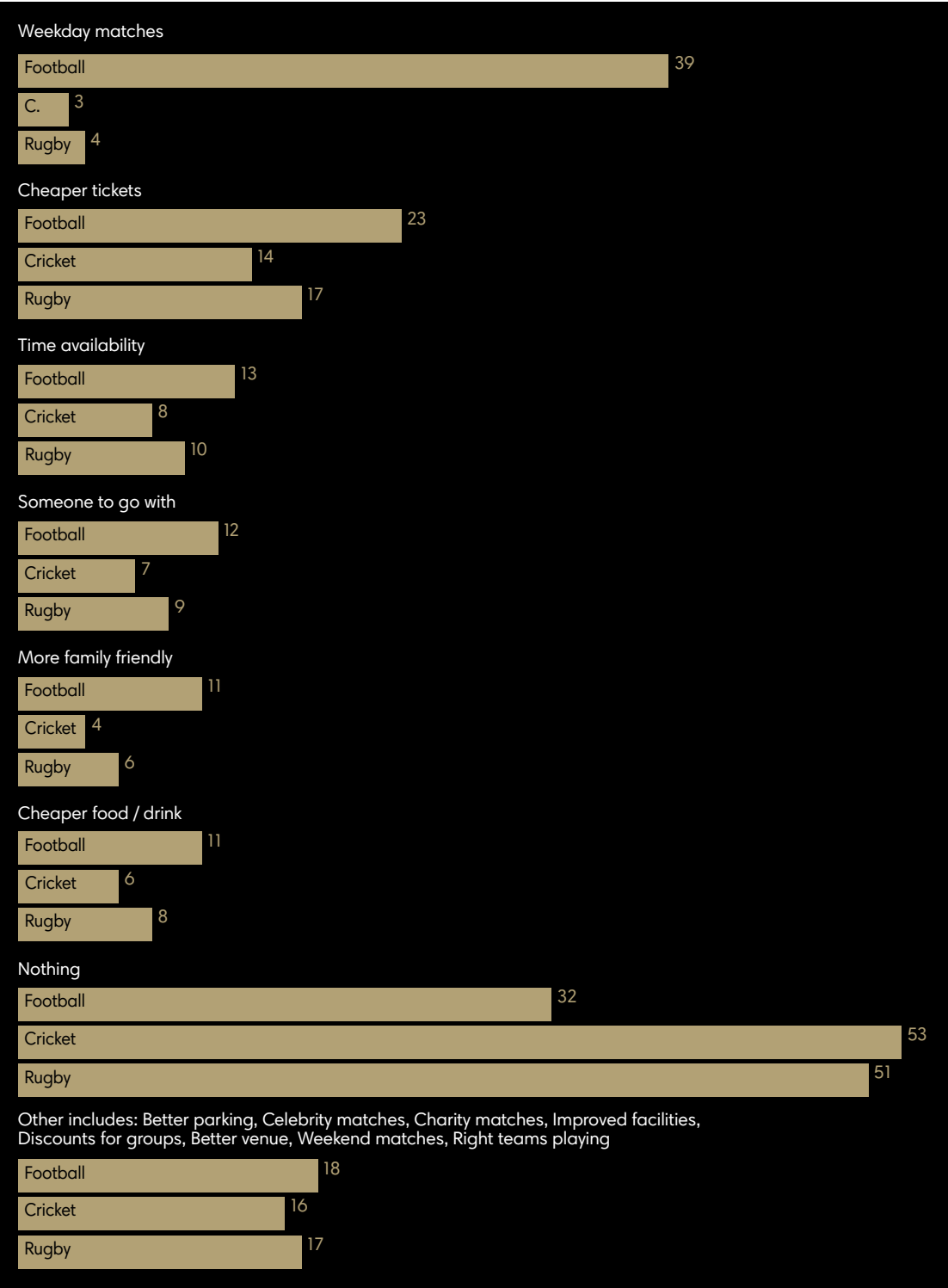
The majority of those that do go to sports events rate personal reasons as their main barrier for not going to more events. Tickets are the second largest barrier, specifically relating to price. This is a particularly large barrier for football fans. It's worth noting that ticket prices are more aligned with expectations among those who do go to sports events.

Attendance motivators

The majority of those that haven't attended a sports match feel nothing would motivate them to go, as they are simply not interested in the sport. While this group would be difficult to convert to sports fans, those who would consider attending a match cite cheaper tickets as the biggest motivator for rugby and cricket.

For football, scheduling matches on weekdays would make non-attendees more likely to attend live matches, particularly for those who consider themselves superfans of the sport. In comparison, weekend matches are the lowest motivator for all of the sports.

Weekday matches would also make existing football fans likely to attend more events (third biggest motivator), behind cheaper tickets and having more time to attend. These are also the two biggest motivators for attending more rugby and cricket events.





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Chapter 3: Getting started

"It's been in my life since I was a baby and just always been there." Female, 23, football

Getting into the sport

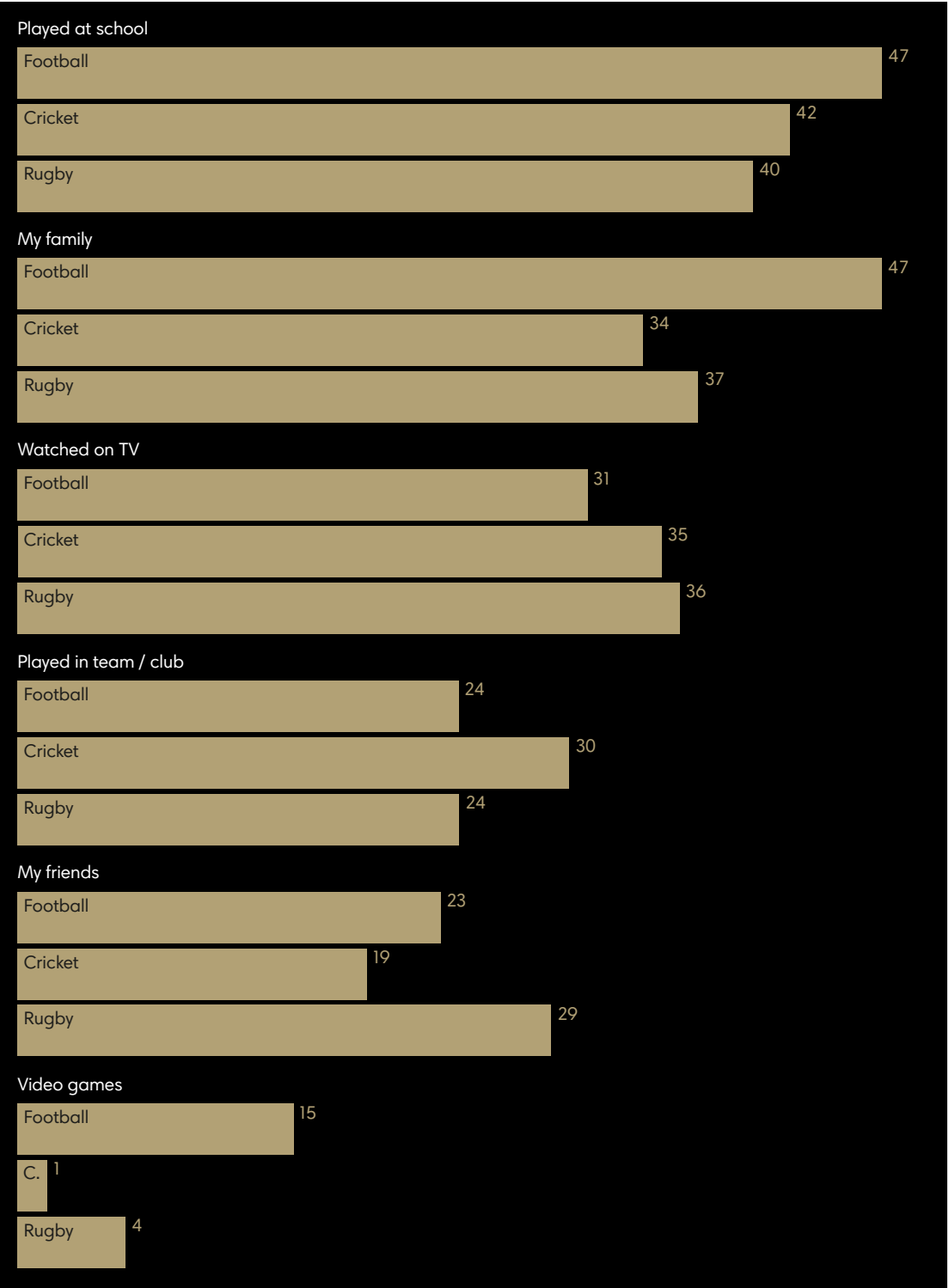
The majority of sports fans get into their respective sport at school or through their family. After this, rugby fans are more likely to support the sport because of their friends and for cricket fans because they played in a team or club. Football fans are significantly more likely to get into the sport by playing video games.

Male fans across the three sports are three times more likely to have been introduced to the sport playing it at school, whereas females are twice more likely to become supporters because of their family.

Football fans start the youngest, being more likely to get into the sport as a child. Rugby and cricket fans are more likely to get into the sport as teenagers and adults. Overall, the younger fans get into the sport, the more likely they are to attend matches frequently in later life.

Football fans are much more likely to go to multiple matches if their family is the reason they got into the sport. While family is a significant instigator for rugby and cricket fans, playing it at school is the largest influence for attending multiple events.

When it comes to playing the sport, football fans are also more likely to play (and regularly) if they get into it as a child and at school. The same is not true for rugby and cricket.



Getting into the sports (%)
Base (fans): football: 2,116;
cricket: 1,313; rugby: 1,259

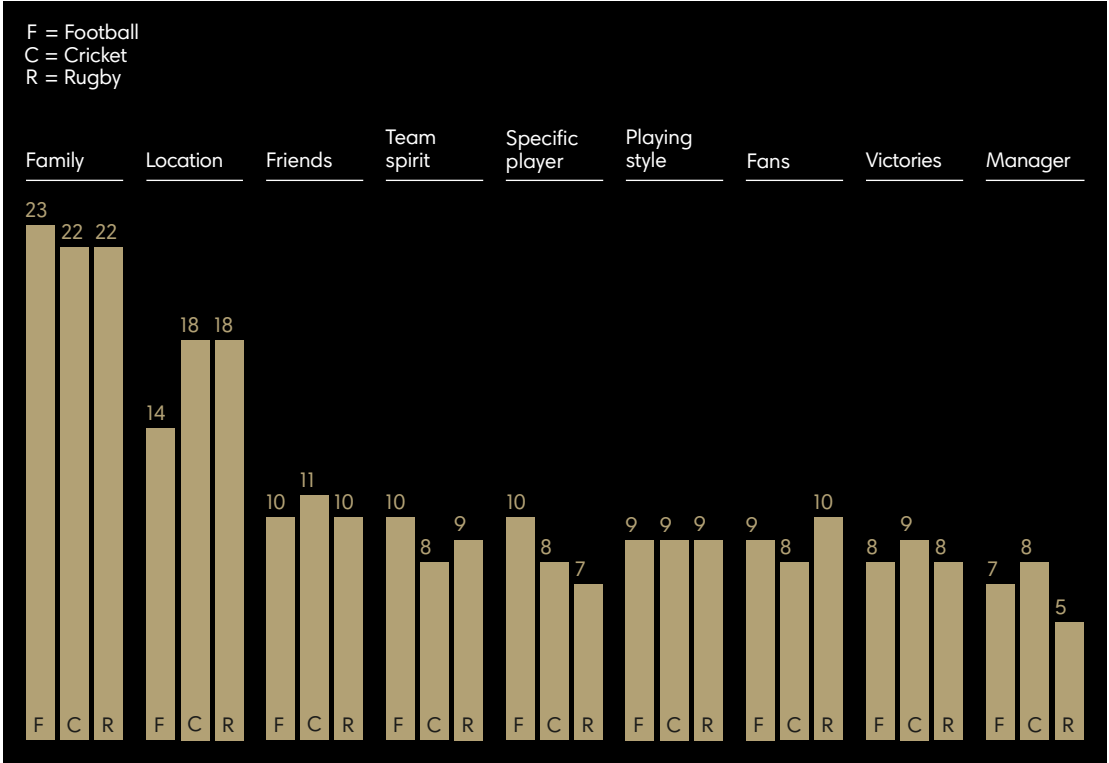
Team support

The majority of sports fans support their team as part of a family tradition or because it's local to them; this is particularly true for older fans. In comparison, younger fans are more likely to support their team because of its history of winning, the team spirit or culture, or because their friends support it.

Just over nine in ten have at least one member of their family supporting the same team. A third share their favourite team with their parents, and around a quarter with their children and / or partner.

Cricket fans are the least likely to share their favourite team with their siblings and children.

Reasons for supporting team (%)
Base: football: 2,116; cricket: 1,313; rugby: 1,259



Reasons for switching teams (%)
Base (team switchers): football: 320; cricket: 199; rugby: 179

Switching teams

Close to one in five football fans admits to previously switching teams, a higher proportion compared to cricket (14%) and rugby (10%). However, the majority say they would not switch teams, with football fans (68%) being the most loyal, followed by rugby (60%) and cricket (53%).

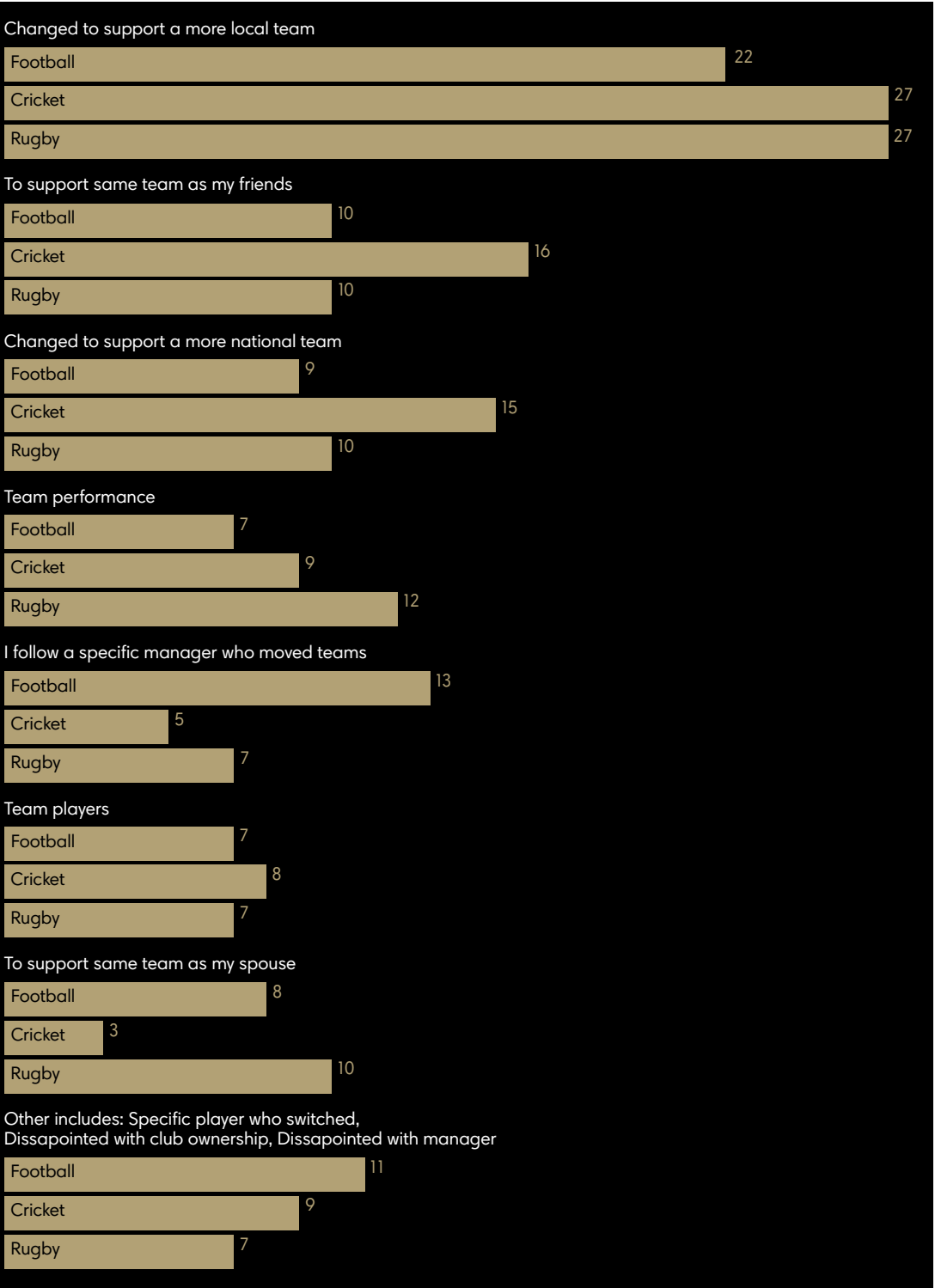
For those who have switched previously, the majority did so to support a more local team. Cricket fans are the most likely to switch in order to support the same team as their friends or to support a national team.

Sports fans over the age of 55, living in East Anglia and Scotland, are the most likely to switch teams. Lower income and divorced fans are also more likely to switch, due to them moving and choosing to support a more local team.

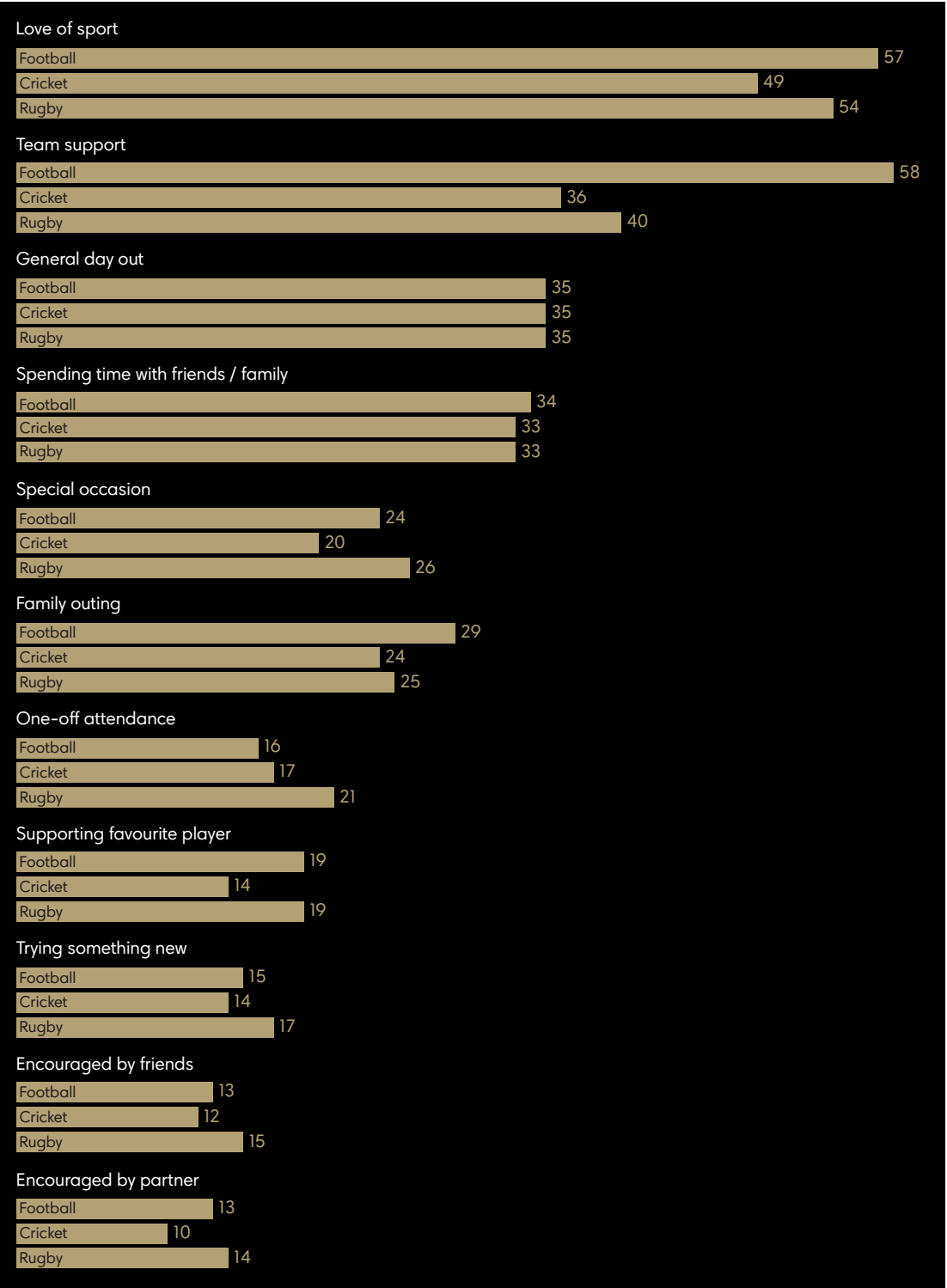
Females are five times more likely to switch rugby teams in order to support the same one as their spouse (nearly three times for football).

Those who said they would consider switching cite poor team performance as the key reason, which is only fourth among those who actually made a switch.

“I moved schools when I was 12 and everyone there supported this team so I did too, and I still support them today.” Male, 37, football







Reasons for attending matches (%)
Base (fans): football: 2,116; cricket: 1,313; rugby: 1,259

Motivations

The majority of fans go to matches simply because they enjoy the sport. Supporting their team is the second strongest motivating factor, and is particularly important to football fans.

Team support is also referenced by fans as their favourite thing about live matches, particularly the excitement of their team winning.

Younger fans are more motivated by social factors whether for a family outing, to spend time with friends / family or for a special occasion.

Female fans are much more motivated to go to a live match for a family day out than males, for all the sports. Males are more motivated to attend in order to support their favourite team.

Female cricket fans are twice more likely to have attended because they were encouraged by their partner, compared to male cricket fans.

“I like the uncertainty of not knowing how the team will play, taking the good times with the bad and still supporting the team, being with family and friends.”

Female, 63, football

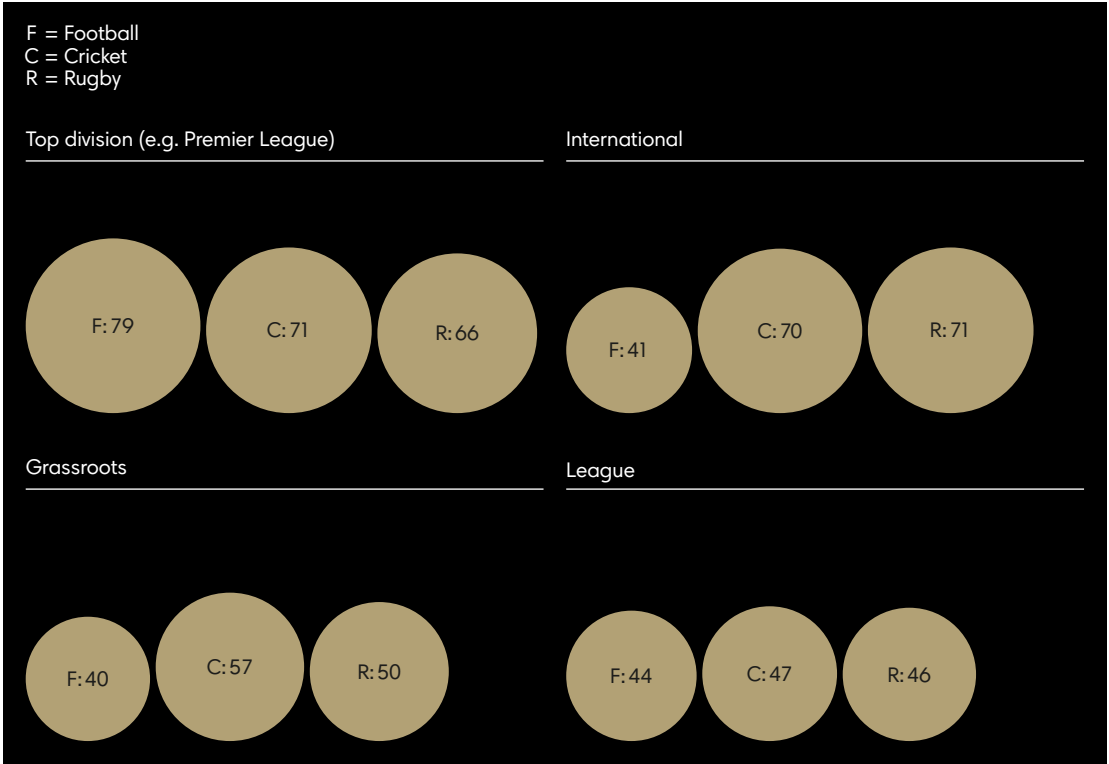
Type of matches attended

When it comes to what fans usually attend, top division (e.g. Premier League) matches are the most popular, particularly for football.

International matches are much more popular with rugby and cricket fans compared to football. Football fans are the least likely to attend grassroots and local events.

Those who rated themselves as super football fans are much more likely to attend top division matches compared to those who did not. The same cannot be said for superfans of rugby and cricket, who usually attend all types of games over more casual fans of the sport.

Types of matches attended (%)
Base (fans): football: 2,116;
cricket:1,313; rugby: 1,259



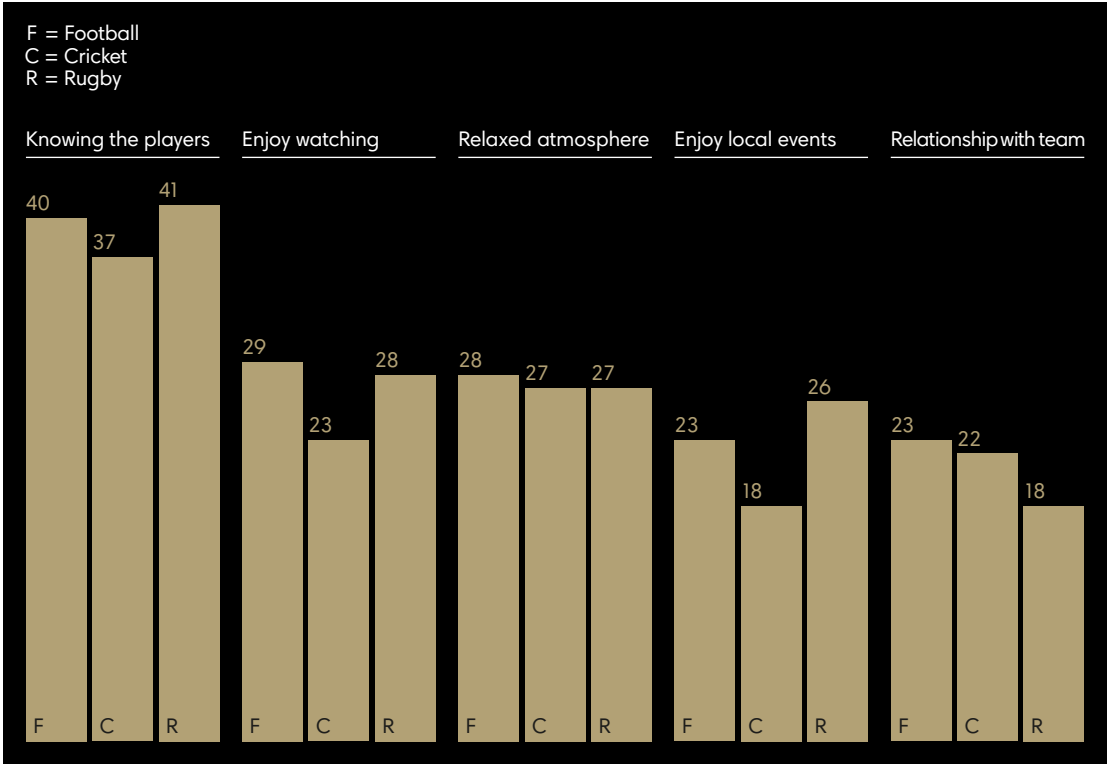
Grassroots

Nearly half of fans regularly attend a local or grassroots match, although an additional 17% have attended at least one local or grassroots match in the past three years despite not attending regularly.

In general, the majority of fans recognise the importance of supporting grassroots sport in order to grow new players (65%). Most feel that clubs have a responsibility to support grassroots (70%).

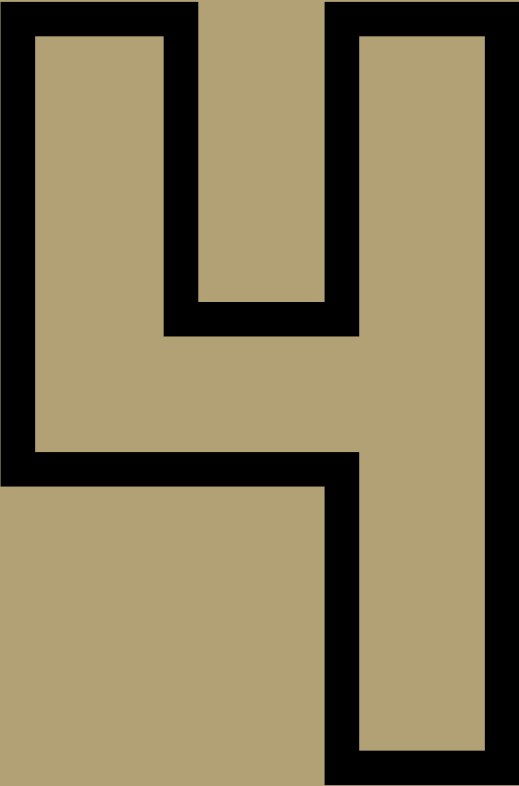
However, 44% are only interested in larger, professional teams. The more they consider themselves a fan of the sport, the more likely they are to be interested in these larger teams only.

Reasons for attending grassroots matches (%)
Base (grassroots fans):
football: 846; cricket: 748;
rugby: 630





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Chapter 4: Run up to the match

*“Getting the tickets. The build up to the game.
Anticipation. Being part of the occasion.”* Male, 53, football

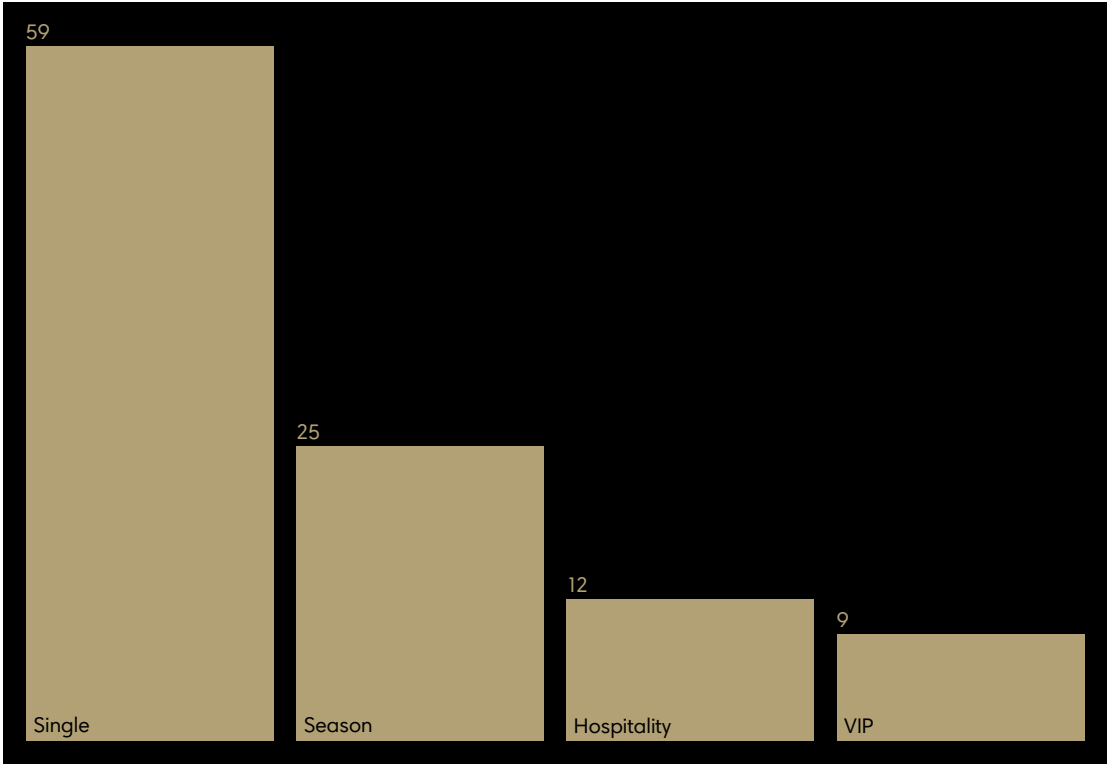
Ticket types

Around three in five sports fans tend to purchase single match tickets. Season tickets are the second most popular ticket type, and more popular for cricket and football than rugby.

Around one in four fans would consider purchasing hospitality or VIP tickets (one in five for football). They are predominately younger, under the age of 34, and more likely to be from London.

There is little difference between the three sports in how fans usually purchase tickets. The majority purchase through the club (43%), then through the venue (36%) and, to a lesser extent, through a primary ticketing site (17%). The remaining 4% use a resale site, although those fans typically only attended one match in the past three years.

Tickets usually purchased (%)
Base (fans): football: 2,116;
cricket: 1,313; rugby: 1,259

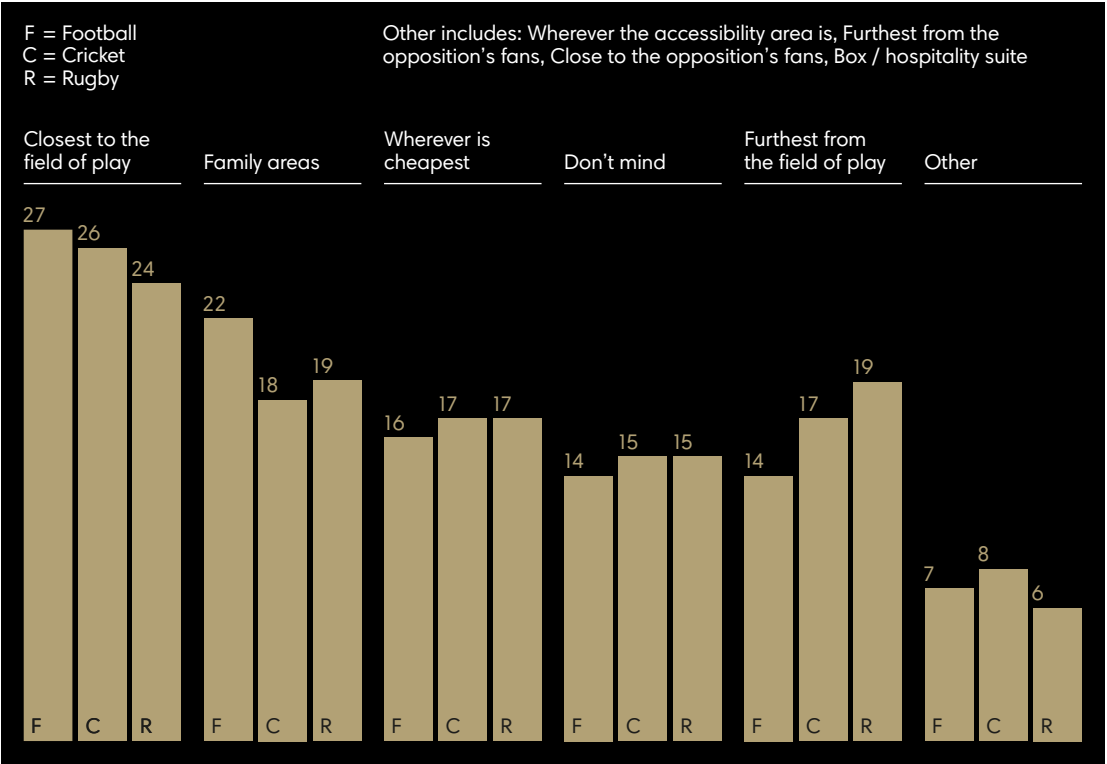


Preferred seats

The majority of fans prefer to sit closest to the field of play, followed by family areas. Very few care about where the opposition is sitting when it comes to choosing their preferred seat.

People who don't consider themselves as superfans are four times more likely to prefer the comforts of a box or hospitality suite when attending. Those that do classify themselves as superfans are less likely to purchase the cheapest tickets on offer, these fans are more likely to want to be closer to the field.

Seat preference (%)
Base (fans): football: 2,116;
cricket: 1,313; rugby: 1,259



Spending on tickets: football

The majority of football fans report spending £30–£59 on a single ticket, which is also what the majority say they are willing to spend. Looking at transactional data, the average amount spent is in fact between £11–£29. For season tickets, the average amount spent is between £300–£499, which is also aligned with what respondents are willing to spend. From transactional data, it appears that fans are paying less than what they are willing to spend, with the majority of football purchasers spending up to £299.

Spending on tickets: cricket

The majority of cricket fans report spending between £30–£59 on a single ticket, which is also what the majority are willing to spend. For cricket purchasers, the average price is higher, £60–£99. For season tickets, the majority of cricket fans spent up to £300, which is also what the majority are willing to spend. Although approximately one in ten say they have and are willing to spend over £1,000 on a season ticket.

Spending on tickets: rugby

The majority of rugby fans report spending £30–£59 on a single ticket, which is also what the majority are willing to spend. This is in line with transactional data, which also places the average ticket price between £30–£59.

Just under one in three rugby season ticketholders pay less than £300, which is also what most are willing to spend. However, one in ten reportedly spend over £1,000 on season tickets and would be willing to spend that amount. From transactional data, the average purchaser spent up to £499 for a season ticket, with 7% spending over £2,000.



Reported, willingness to, and actual spend on tickets

Note: we do not have season ticket sales for cricket purchasers

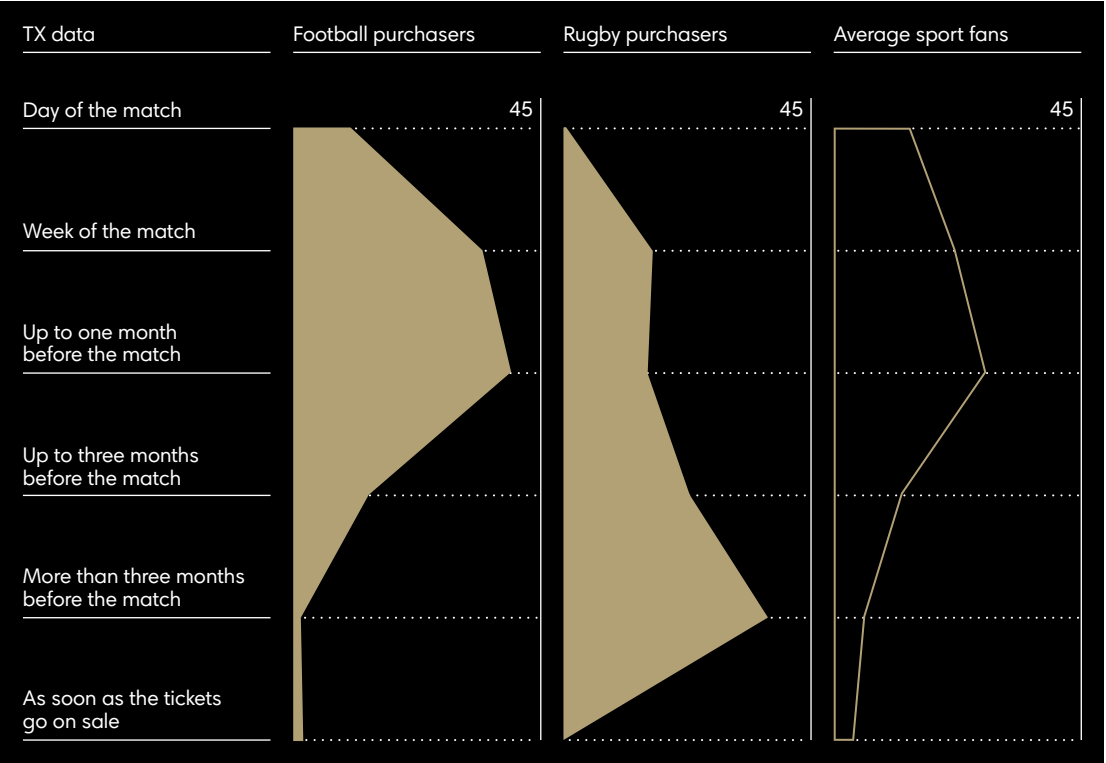
When they book

When it comes to booking tickets, the majority do so around one month before the match. Football fans are more likely to book in the week of the match. Whereas cricket fans are more last minute than the others, with one in five booking the day of the match. Rugby fans are the most likely to book in advance. This is in line with the transactional data. Last minute bookers are much more likely to prefer to sit closer to the field of play, with those who book further in advance looking at whatever is cheapest.

Looking at the top five rugby union events sold on Ticketmaster in 2018, the majority of purchasers bought within the first hour of browsing.

Booking tickets (%)

Base: survey respondents: 4,688;
TX football purchasers: 368,390;
TX rugby purchasers: 677,539





Source of information

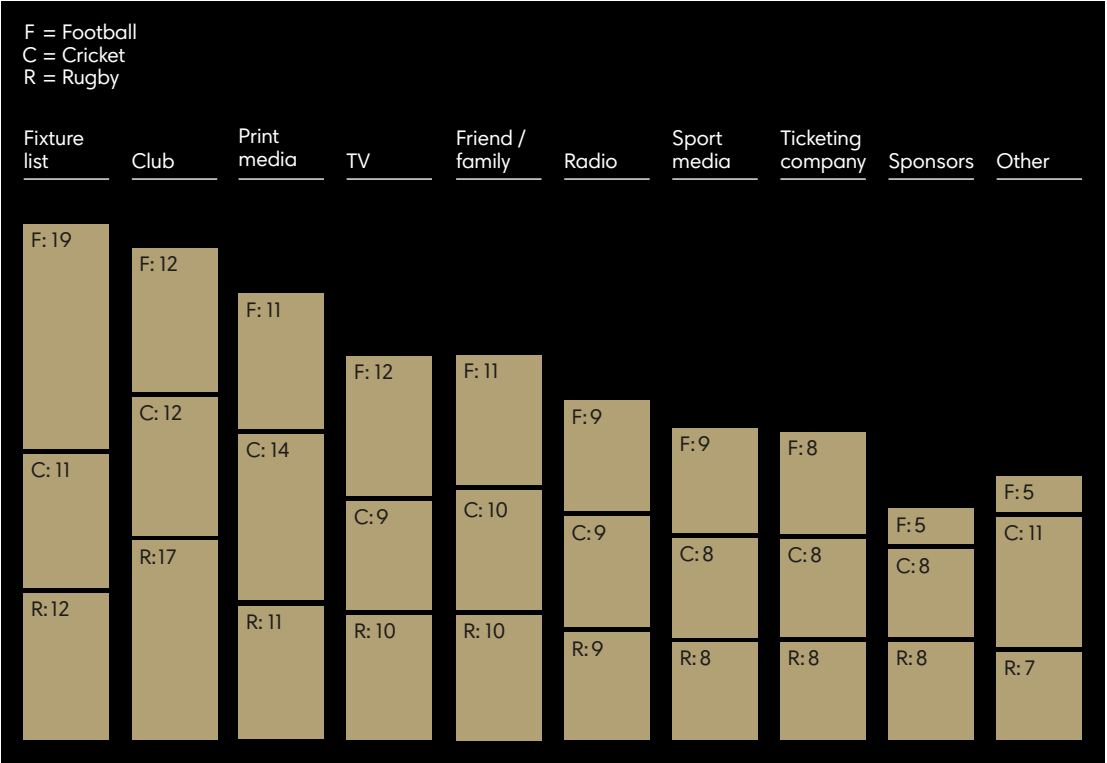
When it comes to finding out about matches, football fans rely mostly on fixture lists. The majority find out directly from the source, such as the club (35%), or via a website (29%). One in 12 access their fixture list via mobile app.

Rugby fans rely mostly on communication from the clubs, either directly (35%) or from their website (22%), although one in six rely on the club’s social media.

The main way cricket fans find out about matches is through a newspaper, either in print (41 %) or via social media (19%). They also rely more heavily on “other” sources compared to football and rugby – the majority citing “BBC” and “Google” as their sources.

For keeping up with sport in general (not just live matches), TV is one of the most relied on sources, particularly for football fans. Rugby fans are the most

Finding out about events (%)
Base (fans): football: 2,116;
cricket: 1,313; rugby: 1,259

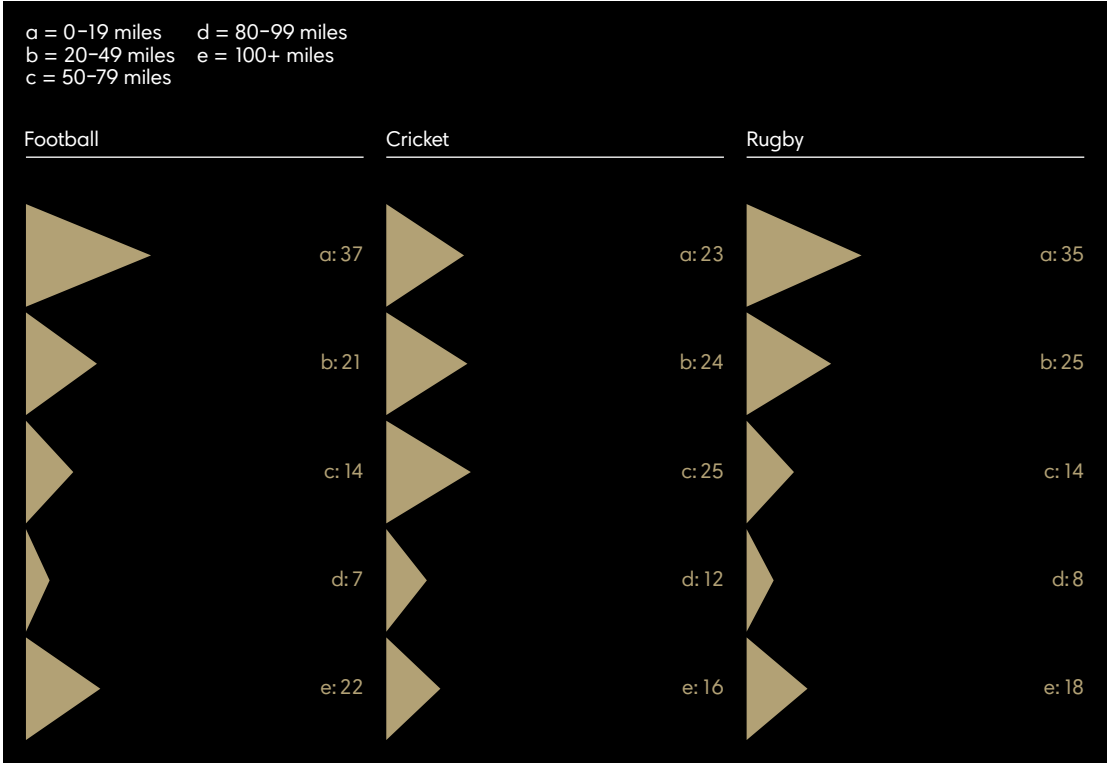


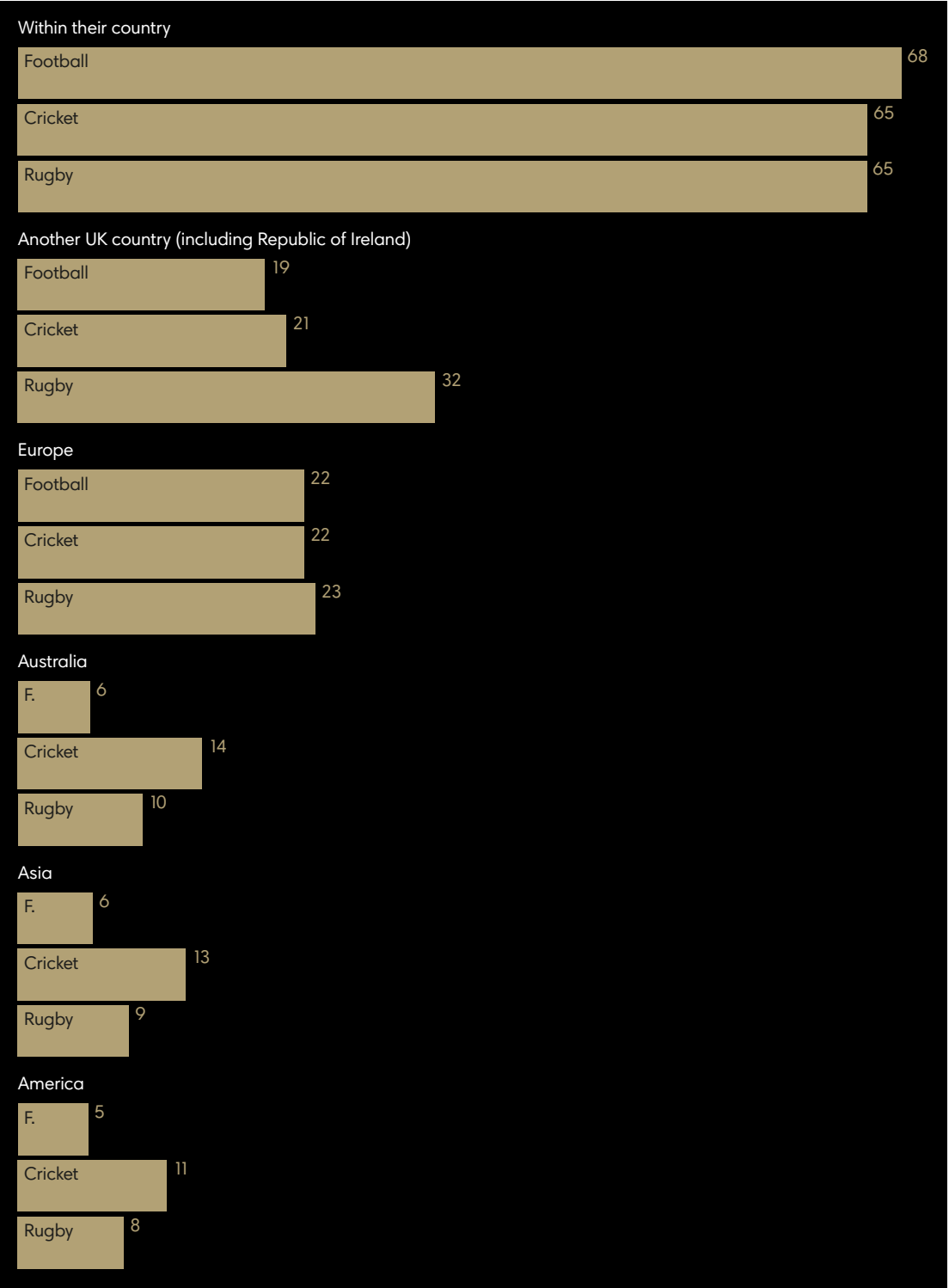
likely to rely on social media in general. Cricket fans rely more on print media.

Distance to venue

The majority of football fans travel up to 19 miles for a match, whereas cricket fans typically travel up to 79 miles. Most rugby fans travel up to 49 miles. Despite the majority of football fans travelling the least distance, they are also the most likely to travel over 100 miles.

Miles travelled to venue (%)
Base (purchasers):
football: 281,965; cricket:
52,593; rugby: 392,118





Travel to away games (%)
Base (travelled to an away game): football: 1,382; cricket: 919; rugby: 851

Away games

Around seven in ten usually attend at least one away game in an average season, with one in ten exceeding ten away games in a season.

A third of rugby fans have travelled to another UK country for a match. This is less for cricket and football fans, with only one in five doing the same.

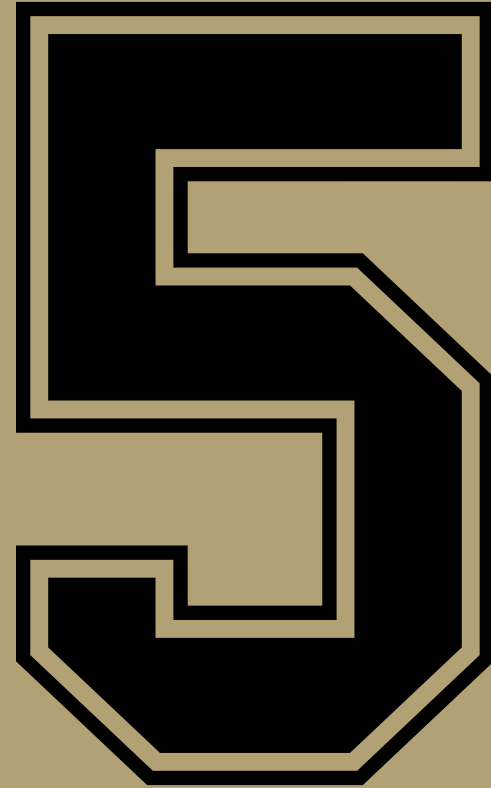
Further afield, cricket fans are the most likely to have travelled to another continent, with football fans the least likely. The same is true for those willing to travel, with around one in four cricket fans considering it, compared to rugby (one in five) and football (one in eight).

In general, Londoners are the most likely to have travelled internationally for a match, with around two in five having travelled to Australia, Asia, America and / or Europe. Welsh and East Anglian fans are the least likely to have travelled internationally for a rugby match, whereas fans from Yorkshire and the Southwest are the least likely to have travelled for a cricket match.

Welsh fans are the most likely to have travelled within the UK for a football or cricket match. Despite being the most willing to travel internationally, English fans are the least likely to have travelled within the UK for an away match.



© Ticketmaster

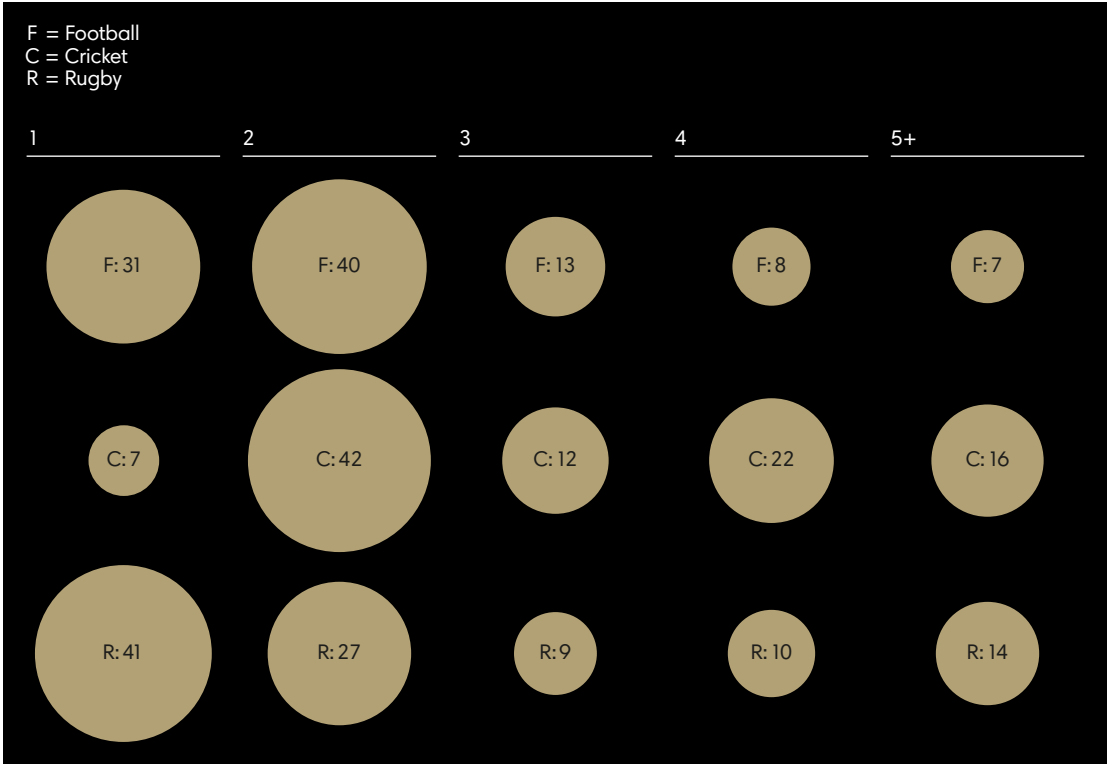


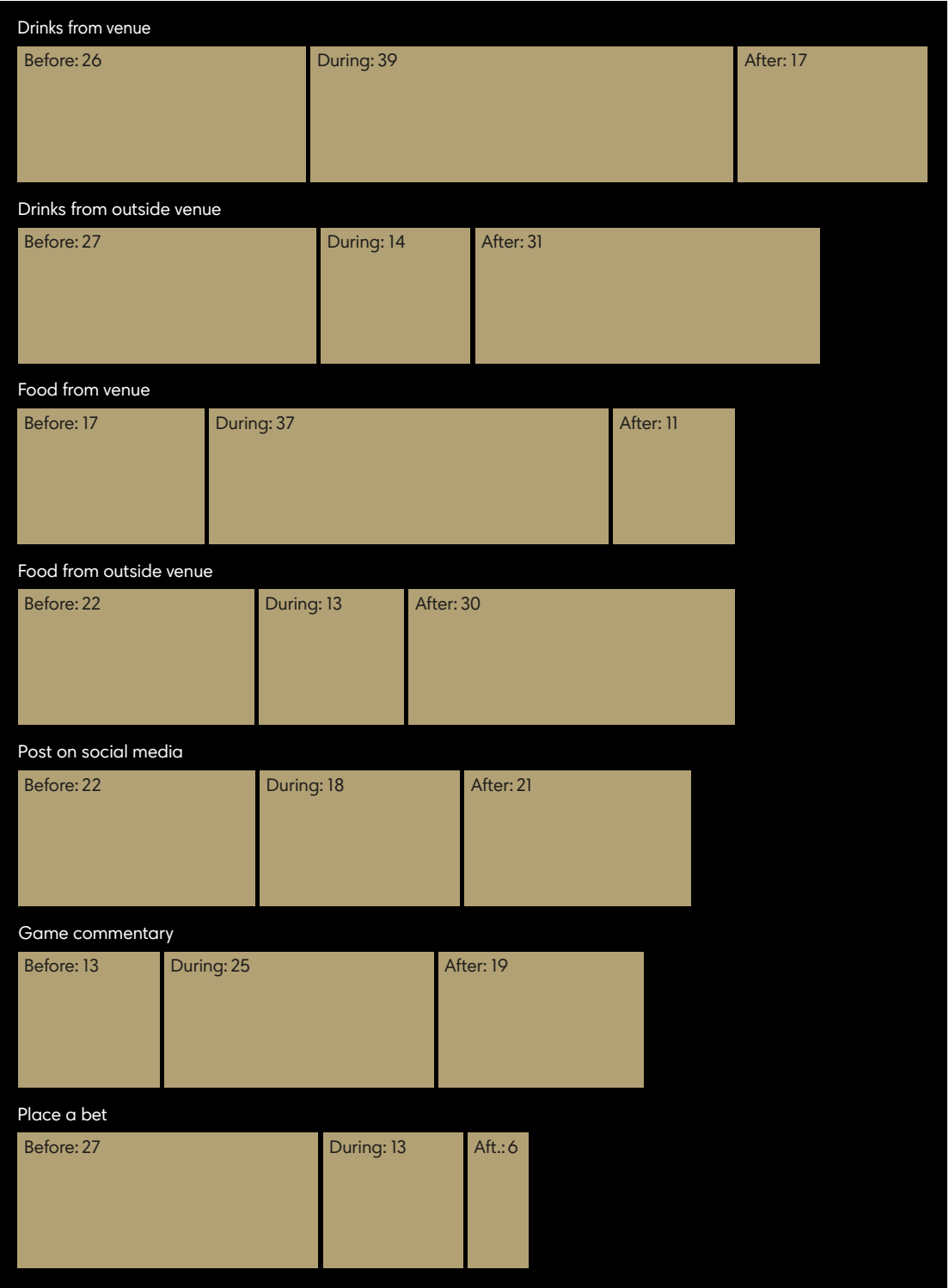
Chapter 5: Attending the event

*“The game is much better when you watch it live.
There’s something about it I can feel but can’t explain.”*
Male, 25, rugby

Who they attend with
43% of cricket purchasers buy four or more tickets on average. Football purchasers, on the other hand, are more likely to buy two tickets and rugby purchasers typically buy just one. This is consistent with what respondents say they purchase.
For all the sports, around one in three usually attend with friends or colleagues, although this is more significant for rugby fans. Football fans are more likely to attend with their sons, cricket fans with their brothers, fathers, mothers or grandparents and rugby fans with their spouses.

Number of tickets purchased (%)
Base (purchasers):
football: 368,390; cricket: 60,729; rugby: 677,539





Match day behaviour (%)
Base (fans): 4,688

During the match

Around two in three sports fans will consume a drink from the venue on match day, the majority doing so during the match itself. Rugby and cricket fans are more likely to have a drink from the venue (and more likely for it to be alcoholic) compared to football fans, as expected given the restrictions on drinking at most football matches during play.

Younger fans are the ones who do more outside the sport itself; they are more likely to drink / eat at the venue and check up on game commentary and / or place a bet.

Around half of sports fans post on social media on the day of a live match, the majority doing so during the match. Superfans of the sport are more likely to post after the match compared to more casual fans. Facebook is more likely to be used before the match, with Twitter and Snapchat during.

Drinks on match day

The drink of choice for two in three on match day is beer with 58% of fans having at least one beer before, during or after a match. The highest proportion is seen in Scotland at 65%, who are also the least likely to consume tea. The lowest proportion of beer drinkers are found in Northern Ireland (31%). They are the most likely to consume coffee, wine or cider on match day compared to the other regions.

Although beer is still the number one drink of choice, Londoners are the most likely to drink tea, Bovril, or a soft drink on match day. They are also the most likely to consume spirits and cocktails. Cricket fans are the least likely to drink beer and more likely to drink tea / coffee, wine, or a soft drink rather than beer. Rugby fans are the most likely to drink cider.





Beer consumption
Base (fans): 4,688

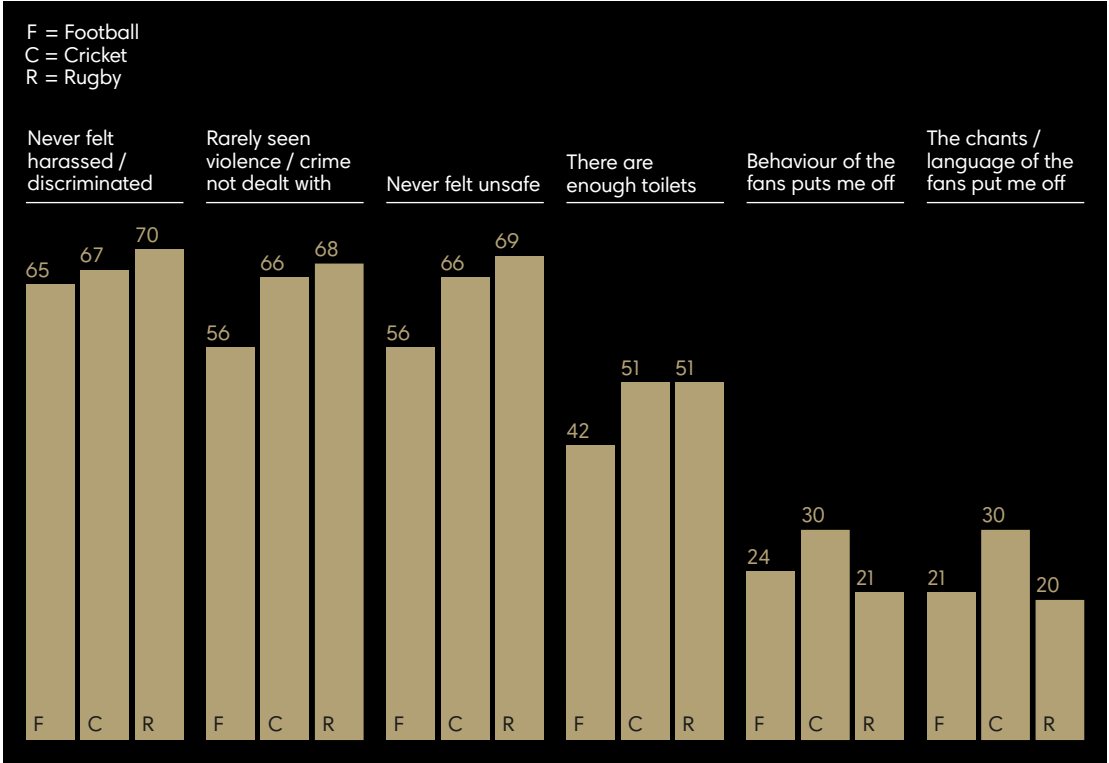
Fan experience

The vast majority of fans have never felt harassed or unsafe at a live match, although around one in six have. They are more likely to be female and under the age of 24.

Football fans are more likely to feel unsafe at matches, and to feel they have seen crimes not dealt with, compared to rugby and cricket fans. They are also more likely to feel there are not enough toilets at venues, particularly true of female fans. However, those who consider themselves football superfans are the least likely to be put off by other fans.

Cricket fans are more likely to be put off attending games because of other fans and their behaviour, language or chants.

Experience at the venue (%)
Base (fans): football: 2,116;
cricket: 1,313; rugby: 1,259





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Chapter 6: Women in sport

“There are now more opportunities for women in sport, with coverage on TV and sponsors. It is definitely on the up, but has a way to go.” Male, 54, cricket

“People of a certain age (my age) are generally committed to the sports and teams they like and have watched from a young age. Governing bodies, authorities, public bodies and broadcasters should do more to promote women’s sports to attract the up and coming generations.” Male, 41, rugby

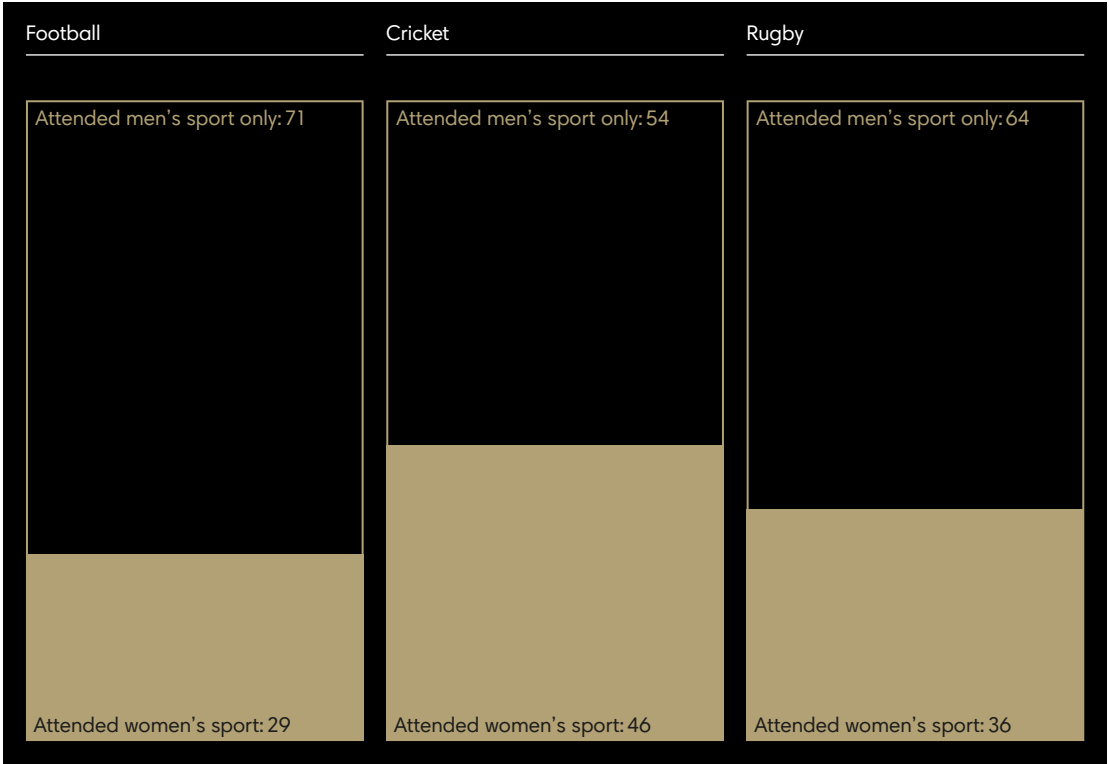
Women’s sport attendance

Of the three sports, it is cricket fans that are more likely to have been to a women’s match in the past three years at 46%. For rugby it’s 36% and football fans, 29%.

Since 2015, there has been very little change in attendance for women’s matches – however, around three in ten sports fans feel they are likely to attend a women’s match in the next year.

International games are the most attended women’s matches for all three sports, with 22% of cricket fans having attended at least one in the past three years.

Women’s sport attendance in the past 3 years (%)
Base (fans): 12,114; football: 3,584; cricket: 1,615; rugby: 1,479



Audience profile

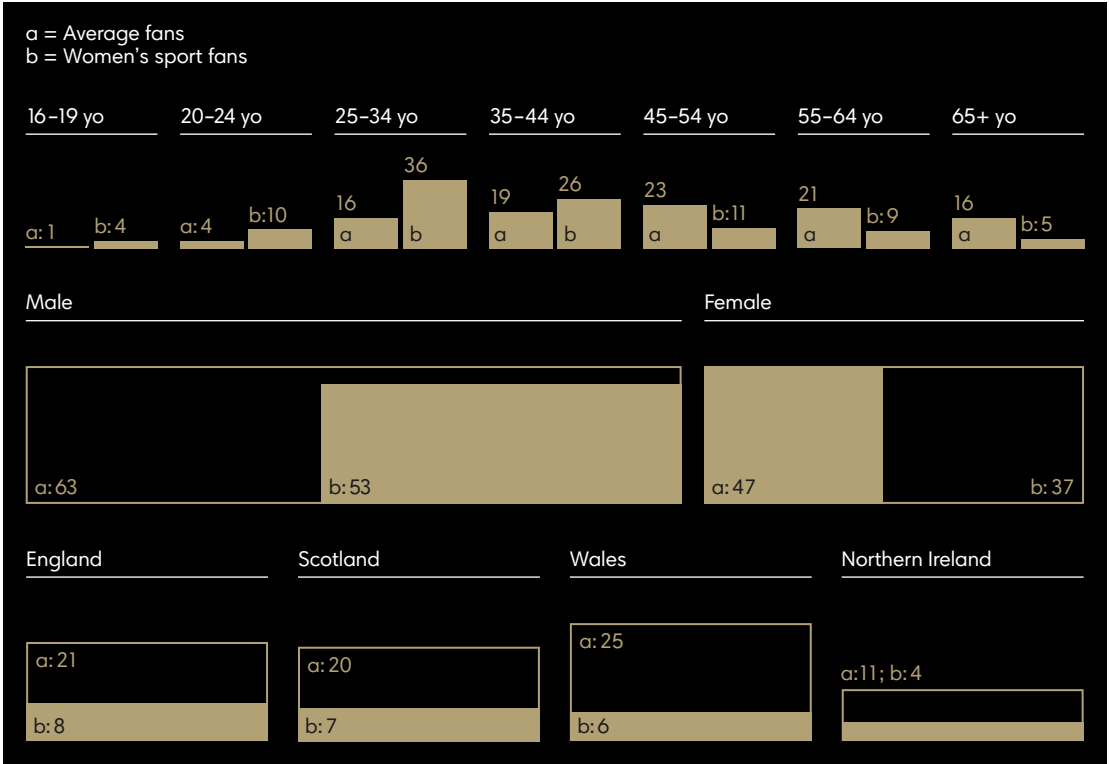
Fans that have been to women’s matches are significantly more likely to be female and under the age of 35 compared to the average sports fan.

As age increases, the likelihood to have attended at least one women’s sport match decreases. The younger age groups are over three times more likely to have attended a women’s match. They are also more likely to feel they would attend a women’s match in the future compared to older fans.

The transactional data tells the same story. On average, those buying tickets for women’s football and rugby matches are younger and more likely to be female. Those who do buy tickets for women’s matches are much more likely to order more tickets compared to men’s matches of the same sport.

For women’s football, the majority is purchasing five or more tickets (compared to an average of two for

Women’s sport audience profile (%)
Base (fans): 984



men’s football). For women’s rugby, the average order is two tickets (compared to one for men’s).

However, the average spend for women’s rugby and football matches is significantly lower compared to men’s matches, with 99% spending up to £29 per ticket.

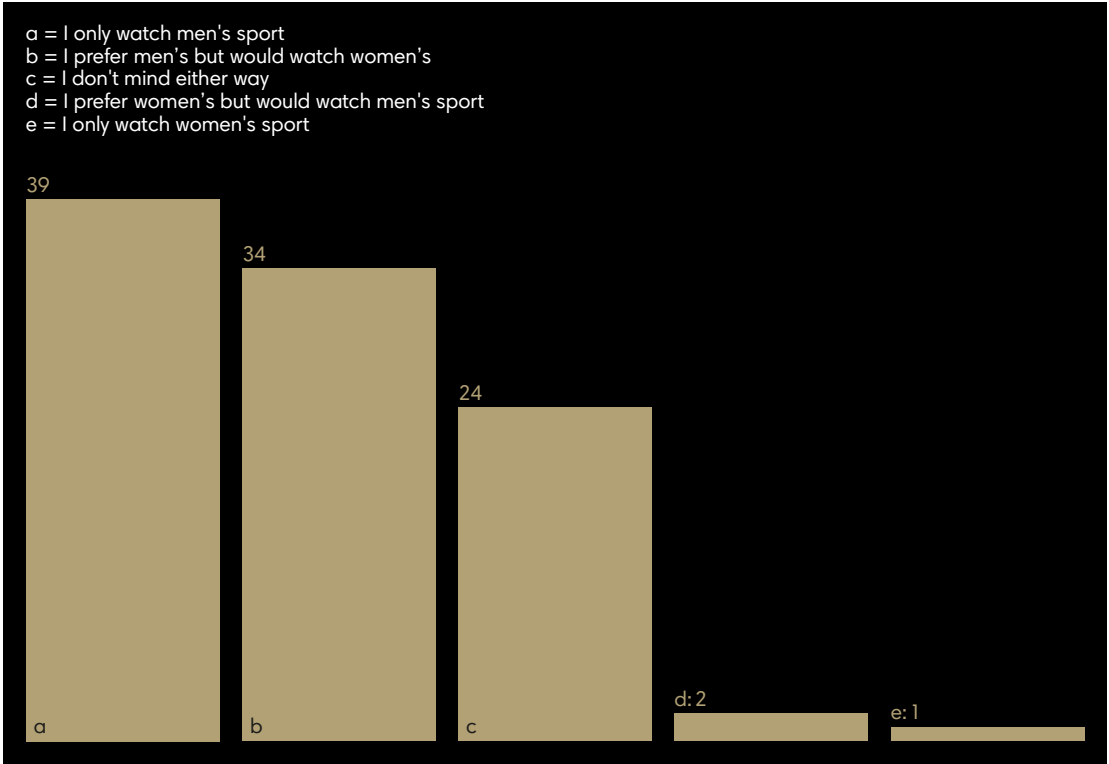
Women in sport

The majority of fans prefer watching men’s sport, with 39% watching men’s matches only. Just 3% of sports fans say they prefer women’s sport over men’s, although around a quarter of sports fans say they don’t mind either way.

Football fans are more likely to watch men’s sport only (43%) compared to rugby (40%) and cricket (33%).

Lack of interest in women’s teams or in women’s sport in general is the top barrier to attending women’s matches. Again, these are higher barriers for football fans compared to rugby and cricket fans.

Sport preferences (%)
Base (fans): 4,688





Communication is key. 17% of fans simply do not hear about women's matches which is why they do not go. Compared to men's sport, fans of women's sport rely more on the clubs, sports media brands and sponsors to find out about the matches they want to attend.

Those who went to a women's match in the past three years are six times more likely to prefer or only watch women's sport. However, 64% still prefer or only watch men's.

Attitudes towards women's sport

Just over three in five agree that women's sport is on the rise. Younger fans are the least likely to agree with this statement, while being the most positive towards women's sport in general.

Older fans, particularly males, are more likely to feel women's sport should not get equal attention and that the clubs / venues should not improve promotion.

However, the bigger the fan of sport, the more positive they are towards women's sport.

"I am proud the UK is so good at women's sports and feel it is making a great difference in our schools in promoting fitness and sports to young girls." Female, 37, cricket





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Chapter 7: Sponsors

"Sponsors are important to sports, without the investment there will be no growth." Male, 32, rugby

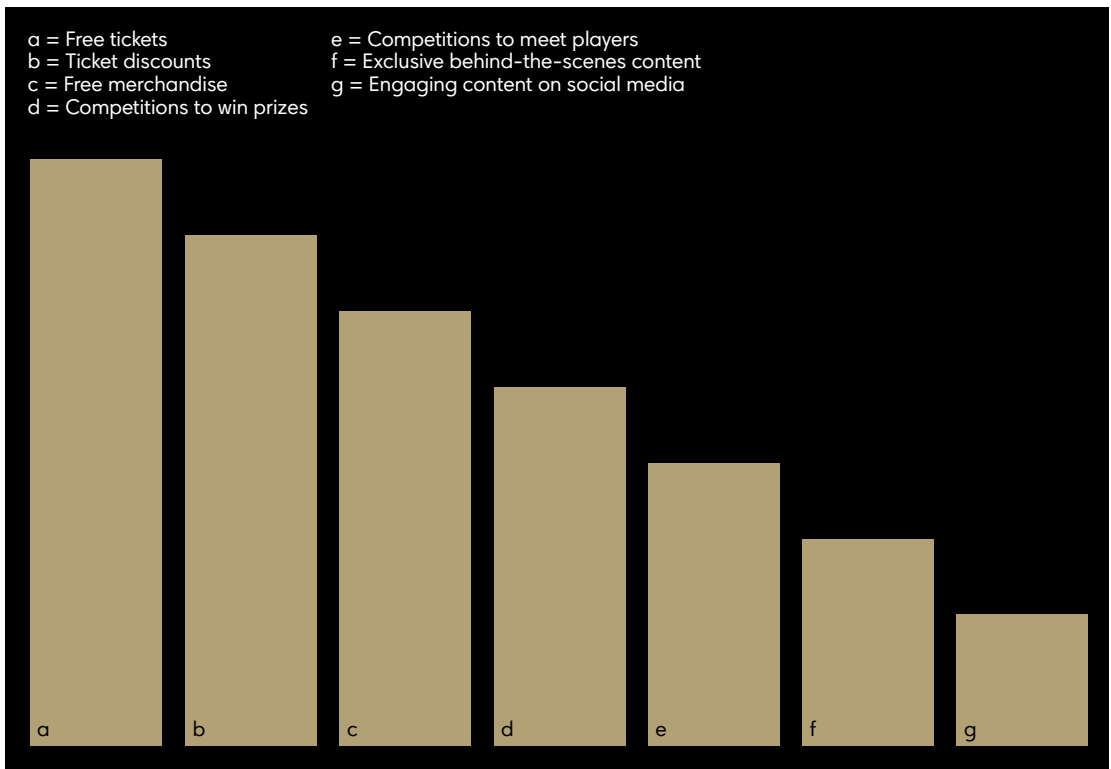
Type of sponsors

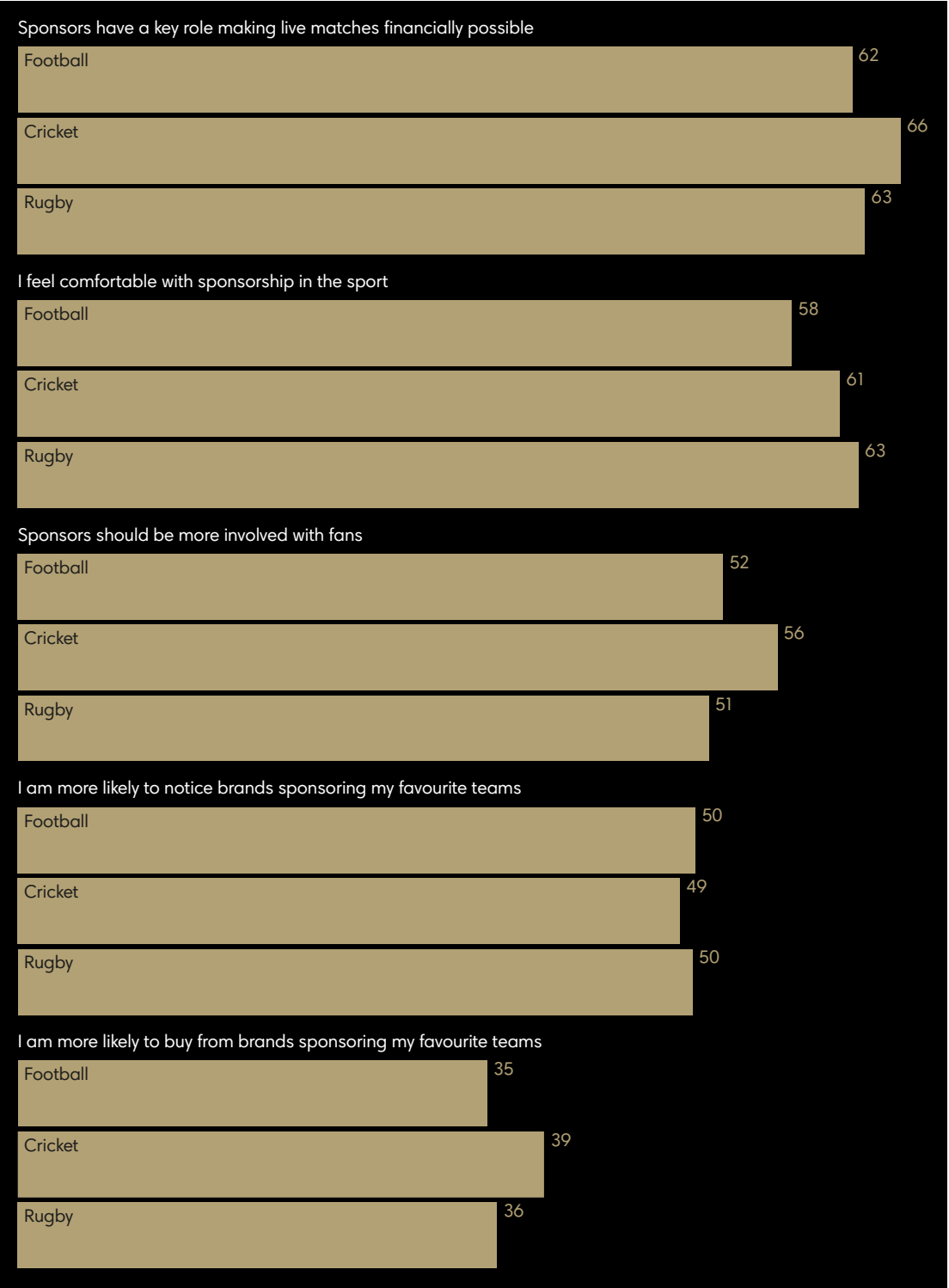
In terms of what sponsors should be contributing to sports events, fans want free tickets or ticket discounts above all else. Content, whether that is exclusive behind-the-scenes footage or engaging social media activity, ranks the lowest in the list. Although, of the three, football fans value this content the most.

Fans, when rating different sponsor types, select clothing, travel, and entertainment brands the most suitable. In general, the younger the sports fan, the more they like entertainment brands as sponsors. Gambling is the least suited brand for the majority of fans, with the exception of men aged 45–54 who place it as their fourth most suited brand type.

Female fans under the age of 24 rate supermarket and fast-moving consumer goods as the second and third most appropriate brands after clothing. While

Sponsors offers
Base (fans): 4,688





Attitudes towards sponsors
Base (fans): 4,688

females above the age of 55 rate travel as their top brand. Males over the age of 55 rate automotive brands as their number one.

Attitudes towards sponsors

Two in three agree that sponsors play a key role in making matches financially possible. A similar amount feel comfortable with sponsorship in sport.

Cricket fans are the most accepting of sponsors. The more cricket or rugby matches attended, the more positive these fans feel towards sponsors. The same is not true for football fans where going to more football matches has no impact on their acceptance of sponsors.

In general, 35–44 year olds are the most comfortable with sponsors, and are the most likely to feel sponsors should be more involved with fans. Conversely, fans over the age of 45 are the least likely to agree with these statements.

Methodology

The primary research was conducted in two waves. The first wave was based on a nationally representative sample of the UK population of 10,000 aged 16–60+, secured by independent panel partners Lightspeed Interactive using an online panel. This was used to get the incidence rate of sports attendance within the overall population, as well as information on each sport's audience and overlap between them.

The second wave was to boost the number of sports fans, to achieve at least 1,200 respondents per sport (football, cricket, rugby union) for the full analysis. These fans were then weighted according to the audience profile identified in the first wave of 10,000 respondents. After cleansing and merging the two datasets, the total number of respondents was 12,114.

For the first nat-rep dataset, we had 3,584 football fans, 1,615 cricket fans and 1,479 rugby fans who answered our base questions about sport in the UK. For the full survey, 2,116 football, 1,313 cricket and 1,259 rugby union fans completed the more in-depth questions, and these respondents were weighted to reflect the demographics identified in the first wave. The research was fielded between June 21st and July 18th 2018.

We have complemented the research data with Ticketmaster's transactional and Google Analytics data. The ticketing data was taken from Ticketmaster's Live Insight database of 1,098,591 purchasers who bought at least one football, rugby union, or cricket ticket from 2009 to 14th September 2018. This has been combined with data from seven Ticketmaster clients consisting of 549,548 unique purchasers: Cardiff City F.C., Peterborough United F.C., Queens Park Rangers F.C., Tottenham Hotspur F.C., Rugby Football Union, Welsh Rugby Union and ICC Cricket World Cup 2019. The data provided by the football clients was weighted against the number

of clubs available in the UK, to better reflect the makeup of football clubs in the UK.

Google Analytics data is based on the top five rugby union events taking place in 2018, ranked by ticket sales.

Definition of terms

Fans: people who have attended at least one live sporting event in the past three years

Rugby: refers to rugby union

Superfan: fans who identified themselves in the survey as superfans

Purchasers: Ticketmaster customers from Ticketmaster's transactional data

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Welsh Rugby Union



About Ticketmaster

Ticketmaster is the global market leader in live event ticketing, digital marketing, and mobile fan engagement tools that drive over 500 million tickets to fans in 29 countries.

We are the world leaders in ticketing, and the number one destination for tickets selling on behalf of hundreds of events.

Our mission is to delight fans with the best possible experience when buying tickets, while providing our 12,000+ clients with the most sophisticated, cloud-based, web tools to manage their events.

We are constantly investing in technology innovation and are committed to delivering world-class products and services across the entertainment ticketing sector. We are proud to provide a safe, secure and stable environment for fans to purchase tickets.

Say hello at:
tmsportsales@ticketmaster.co.uk

About Ticketmaster Insight

Ticketmaster Insight provides consumer insight and business intelligence on events, entertainment and ticketing. We deliver sophisticated data products and services that help to improve customer retention, maximise ticket sales, increase upsells. These range from dedicated research resources to access to our international customer database, Live Insight (with more than 102 million individual customer records across 20 markets), with which we produce unique customer insight.

In the UK, the Insight team leverages data from Ticketmaster's massive database of 30m plus fans. Overlaid with in-house and licensed demographic data, Insight offers information on fan preferences, and ticketing trends to give artists, venues and teams unrivalled insight into how, where and to whom they can sell tickets – and, afterwards, measure the effectiveness of marketing campaigns while events are still on sale, to optimize results and ROI.

State of Play: Sport UK is the sixth in a series of reports published under the LiveAnalytics banner by the Insight team at Ticketmaster International, as part of our drive to better understand the live entertainment sector and its audiences. The first State of Play report was published in 2012 on Festivals, followed by Theatre in 2013, Comedy in 2014, Dance music in 2015, and Grime in 2017.

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