

Ipsos: State of the Game research

Ipsos research report

June 2026



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KEY FINDINGS

01

Key findings (1)

Club loyalty: Family, friends and locality drive support

Four in ten fans (41%) support their club because of family and friends, whilst a third (33%) support the first team they watched. Being local is also a key driver (31%), especially for fans outside the Premier League.

Fans describe how engaging with football creates connections and sense of belonging, bringing them closer to family and friends through shared experiences.

Club loyalty: Support is often seen as unconditional

Almost half of fans (47%) say they would never consider switching teams, rising to 55% among highly engaged fans. Some describe their loyalty as an unbreakable emotional bond tied to identity and family tradition – something “in their DNA” that defines who they are. Poor team performance rarely shakes this commitment.

When presented with potential scenarios, only extreme circumstances of a relocation combined with rebranding would break some fans’ connection and prompt fans to stop supporting their club.

Fans have a range of concerns around the game

Fans identify a range of issues facing the game: financial disparities between the Premier League and lower divisions; affordability and access challenges including ticket prices and expensive TV subscriptions; ownership taking advantage of fans’ goodwill; commercialisation diluting fan experience by prioritising tourists over loyal supporters; and on-pitch issues including player power (e.g. demanding transfers and better contracts), excessive wages, and VAR (Video Assistant Referees). Lower league fans feel particularly affected by financial inequality between themselves and the Premier League/top end of the Championship.

Mixed feelings on being valued by clubs

Fans’ views are mixed on whether their club values and listens to them. 42% agree their club values and listens to them, but the majority do not agree, with three in ten (31%) actively disagreeing that their club values them, and a further quarter (25%) noting they are neutral or don’t know. Lower league fans can feel closer to their clubs due to smaller crowds and more direct relationships with management. Some fans reference fan-owned models (AFC Wimbledon, Germany’s 50+1) as most effective for genuine engagement.

Key findings (2)

What fans want a say on

62% of fans are satisfied with how their club engages with them. Over half (54%) want a say on ticket prices and allocations, whilst other aspects that fans are most likely to feel they should have a say include matchday experience, fan engagement approaches, and heritage factors including stadium moves and badge changes. However, many remain sceptical about whether their input would actually influence owners.

Attending matches

Ticket prices (82%) and matchday atmosphere (81%) have the largest influence on whether fans attend matches in person. Key barriers include cost (not just tickets but transport, food, and merchandise), lifestyle commitments, unpredictable scheduling and last-minute changes to kick-off times. Fans identify cheaper tickets, simpler purchasing systems, and improved transport links as factors that would encourage more attendance.

Watching on TV

Around three-quarters of fans (73%) pay for at least one subscription to watch men's football, with 40% subscribing to more than one. Different viewer types emerge: ardent enthusiasts (watch everything), loyalists (own team), occasionals (major events only).

Around a quarter (26%) say they watch football via pirated or illegal means at least once a season, with one in five overall (20%) watching via these means at least monthly during a typical season.

Heritage

Club history is the most important heritage aspect to fans (selected by 91% as important), followed by stadium location, matchday traditions, and community presence (all 87%). Six in ten fans (59%) agree heritage is well protected.

Fans primarily associate heritage with their club's founding story, historic players and performances, stadium and location, traditional kit colours and badge, as well as matchday traditions like songs and chants.

BACKGROUND AND METHODOLOGY

02

Research approach

To fully address the research questions, Ipsos delivered both quantitative and qualitative research:

1

Quantitative research

The quantitative research phase was conducted through the Ipsos online omnibus, reaching 1,904 adults in England or Wales who support a team within the top five divisions in English men's football.

The survey covered:

- Perceptions of the current key issues in football
- How fans engage with their club
- What influences how often fans watch football in person and on TV
- Why fans support their club, and what factors, if any, could lead fans to support another club
- What fans would do if their team ceased to exist
- What aspects of club heritage are most important to fans

2

Qualitative research

The qualitative phase comprised 12 x online focus groups with football fans in England or Wales who support a team within the top five divisions in English men's football.

The discussions covered:

- The current key issues to fans
- Extent to which fans feel listened to and valued by their club
- How fans engage with their club
- What club heritage means to fans
- Why fans support their chosen club
- Scenarios to understand whether different circumstances could lead to fans supporting another club

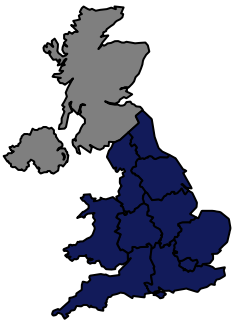
Methodology and sample – Quantitative research



Overview

Ipsos carried out an **online survey via Ipsos' online omnibus**. From an overall nationally representative sample of 4,092 adults aged 16+ across England and Wales, a total of 1,904 identified themselves as a fan of a men's football team within the top five divisions in England and Wales. These respondents proceeded with the full set of survey questions. Quotas were set on the overall sample to be representative of:

- Age
- Gender
- Region
- Socio-economic group



Data collection

The survey was carried out **online** and respondents were sampled from the Ipsos online panel.

Fieldwork took place between 10th – 14th April 2026

Methodology and sample – Qualitative research

The qualitative research comprised **12 online focus groups with men’s football fans in England and Wales. In total 96 participants took part.** Groups were segmented by league tier and self-reported engagement level (see table below) and within each group there was a mix of fans by gender, age, ethnicity, and region.

The groups took place between 17th February and 13th April 2026. The **composition of the groups** was as follows:

Group	League	Level of engagement with football in England and Wales*
1	Premier League	High
2	Premier League	High
3	Premier League	Medium
4	Premier League	Low
5	Championship and League One	High
6	Championship and League One	High
7	Championship and League One	Medium
8	Championship and League One	Low
9	League Two and National League	High
10	League Two and National League	High
11	League Two and National League	Medium
12	League Two and National League	Low

*Levels of engagement were categorised based on the extent to which participants attended live games, watched football on TV and engaged in football in other ways.

Over half (53%) of all adults follow men's football in England and Wales; 47% overall support at least one team



...of the sample of 4,092 adults aged 16+ in England and Wales identified themselves as following men's football in England and Wales to some extent.



...of the sample of 4,092 adults aged 16+ in England and Wales identified themselves as a fan of at least one men's club in the top five divisions of men's English football.

Among the 47% who support at least one men's team in the top five divisions of men's English football:

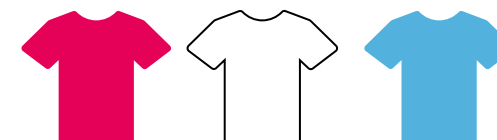
67% support one men's team



23% support two men's teams



6% support three men's teams

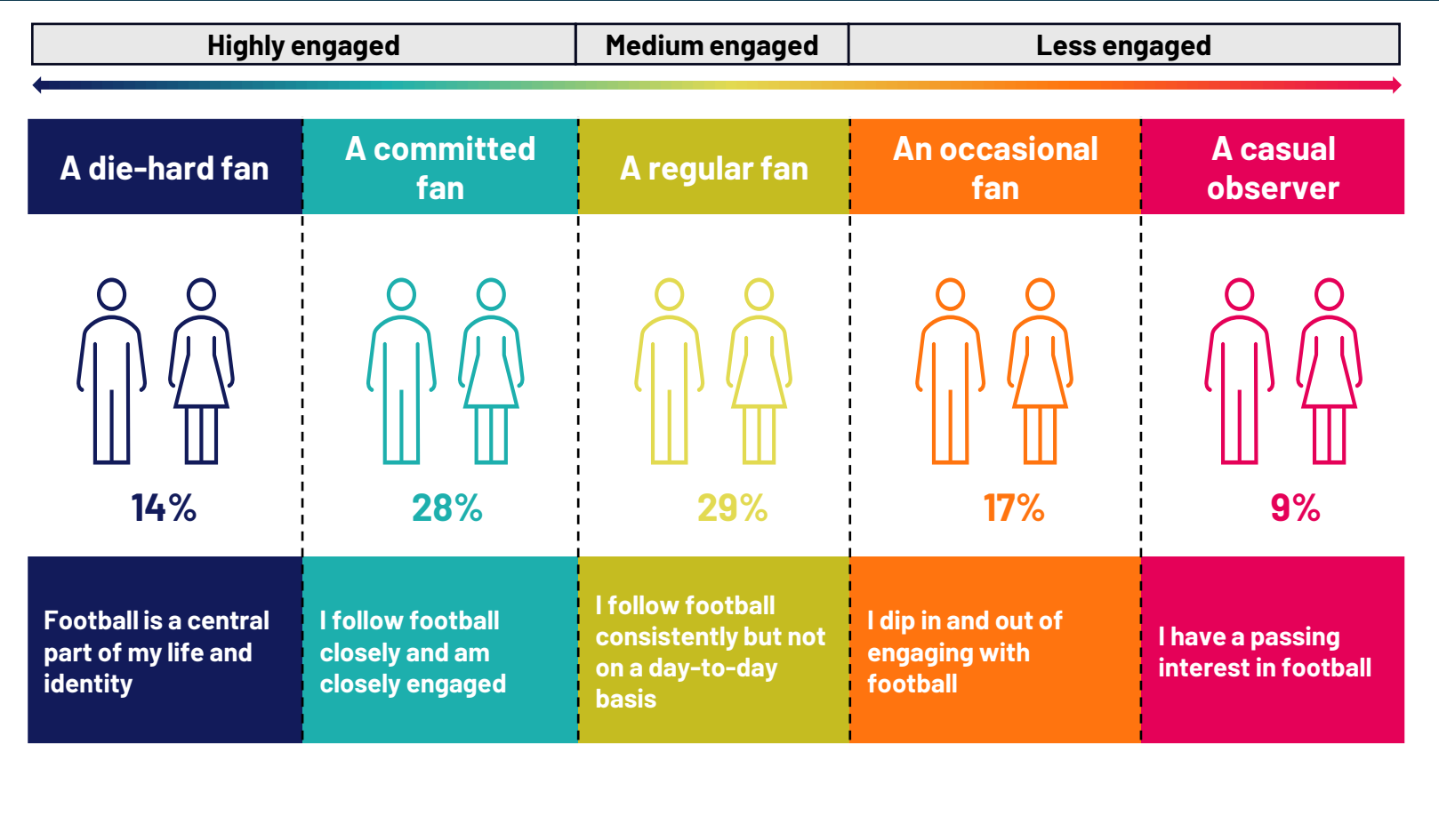


Defining levels of engagement amongst football fans

Survey respondents were asked how they would describe themselves as a men's football fan and were given five options, ranging from 'A die-hard fan – football is a central part of my life and identity', through to 'A casual observer – I have a passing interest in football'.

The chart on the right shows the proportions of fans who placed themselves within each of the five categories.

These categories are the basis for fan engagement levels that are referenced throughout this report, "Highly engaged" include the first two categories (die-hard fans and committed fans), "Medium engaged" include the middle category (regular fans), and "Less engaged" includes the last two categories (occasional fans and casual observers).



CLUB LOYALTY

03

Men's football fans are most likely to have chosen to support their team through friends or family.

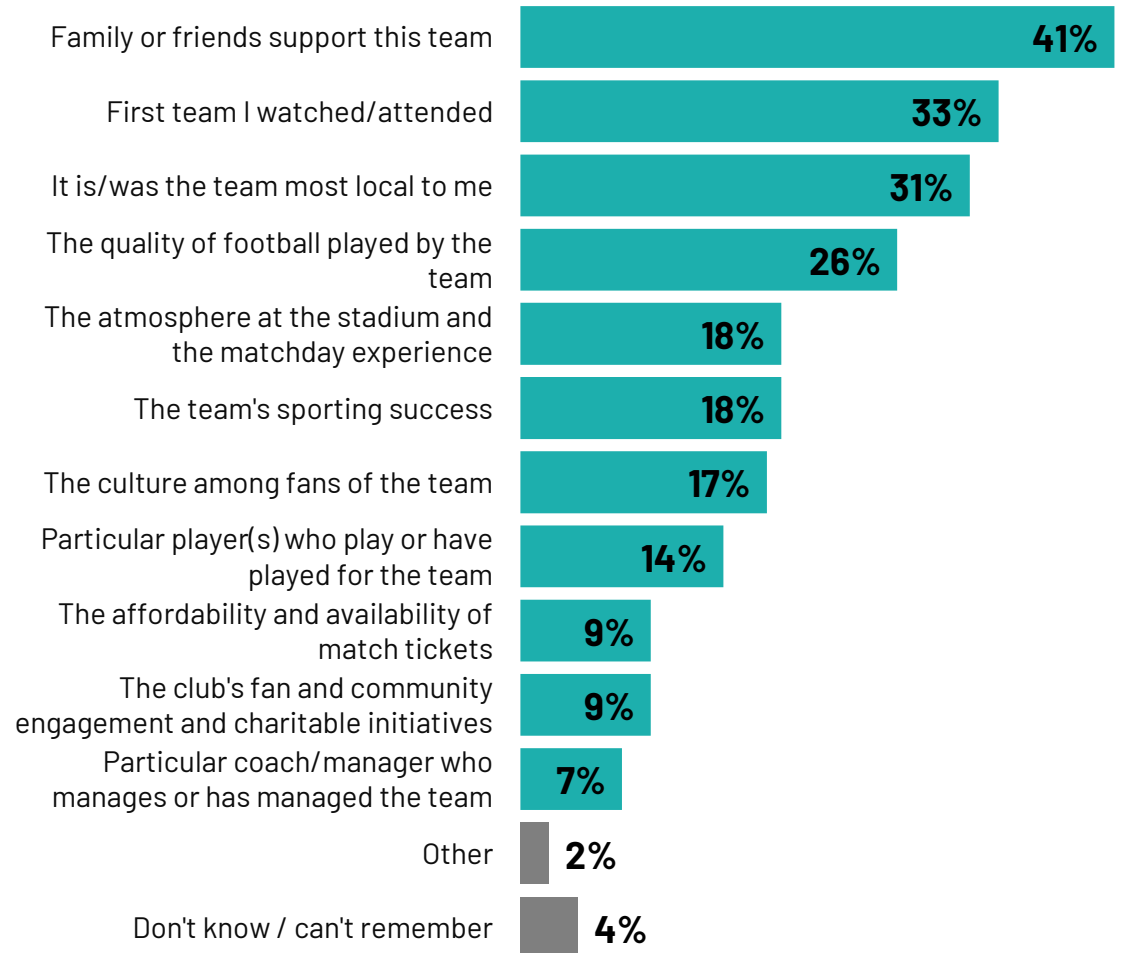
Four in ten fans (41%) support their club through family or friends having supported the same team.

A third (33%) support their club because it was the first team they watched. This matters most to highly engaged fans – 40% of these fans said this was why they support their club.

Being local is a key driver (31%), especially for fans outside the Premier League; 37% of Championship/ League One fans, and 35% of League Two/ National League fans said this is why they support their chosen club.

Factors including specific managers/coaches, the club's fan/community engagement and the affordability/availability of tickets are less likely overall to be cited as key reasons for supporting a team.

Q13. Thinking now about the men's team in England and Wales that you would describe yourself as supporting the most. Which of the following best describes the reasons why you chose to support your football team. Please select the top three reasons.



Q13. Thinking now about the men's team in England and Wales that you would describe yourself as supporting the most. Which of the following best describes the reasons why you chose to support your football team. Please select the top three reasons.

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

Fans in the focus groups explained why these factors were so important to them in supporting their chosen club.

Friends and family, alongside location, were similarly cited as key factors among the focus group participants. Fewer cited playing style and specific player(s) as crucial factors.

Strength of connection was critical; participants across ages, leagues and levels of engagement highlighted how football brings them closer to their family and friends. Some described the routine of attending matches and could not imagine life without it.

Similarly, fans who support their local club cited how it helps to create a sense of belonging and connection to the place that they come from, instilling and strengthening local pride.

"I've grown up in Braintree, so I've grown up going with my family, my brother. It feels like it's an extension of the community. I just can't imagine not having gone to the matches" League Two/ National League, higher engaged fan.

"It's my dad's team so that's probably the most influential thing. I live maybe three miles from Old Trafford so they're my local club. I've had a season ticket since I think I was five, so I've been going for close to 30 years now". Premier League, highly engaged fan

"I've supported them really, most of my life because my family did" Championship/ League One, less engaged fan

Fans typically described their continued support as non-negotiable.

Some fans highlighted their support for clubs that are not very successful. Fans attributed their loyalty to a strong emotional bond to their club. Despite poor performances, fans described their loyalty as non-negotiable. Some struggled to articulate this feeling but acknowledged that it defines who they are (at least to some extent). Often this was tied to family – fans want to continue the tradition of supporting the club and pass it on to future generations.

Likewise, some fans explained that the hope of having a successful season is a key factor. Fans often highlighted past seasons where their team had performed well and how it made them feel – which they hoped they would feel again in the future.

The enjoyment of watching football draws fans in, with many noting the fun and excitement it brings. For some it is a core part of their daily/weekly routine, and were unsure what else they would do instead of watching football.

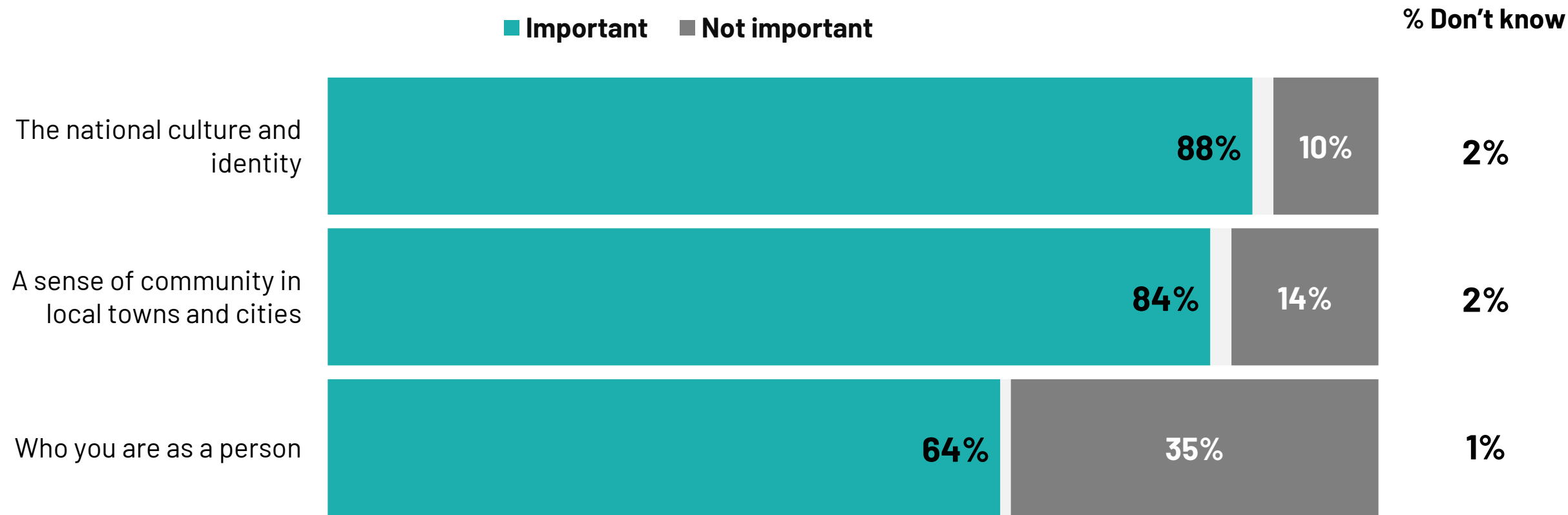
“Loyalty keeps me coming back, through ups and downs, it’s a lifelong commitment.” Premier League, highly engaged fan

“Once you’ve got that club in your DNA, it’s very difficult to get them out” Championship/ League One, medium engaged fan

“The family connection keeps me going; it’s something we’ve always done together” League Two/ National League, highly engaged fan

“I just remember so much of my childhood being my dad. Just like, either, like living in hope or just absolute despair because a game’s not gone well ... But it’s amazing that he has been a fan his entire life, despite them not always doing great. And I think a big part of football is that, like, sense of loyalty and hope.” Championship/ League One, less engaged fan

Fans view men’s football in England and Wales as crucial to national culture and identity, and to local sense of community. Around two-thirds say football is important to who they are.



Q6. Thinking of men’s football in England and Wales, how important, if at all, is football to ...?
Base: 1904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

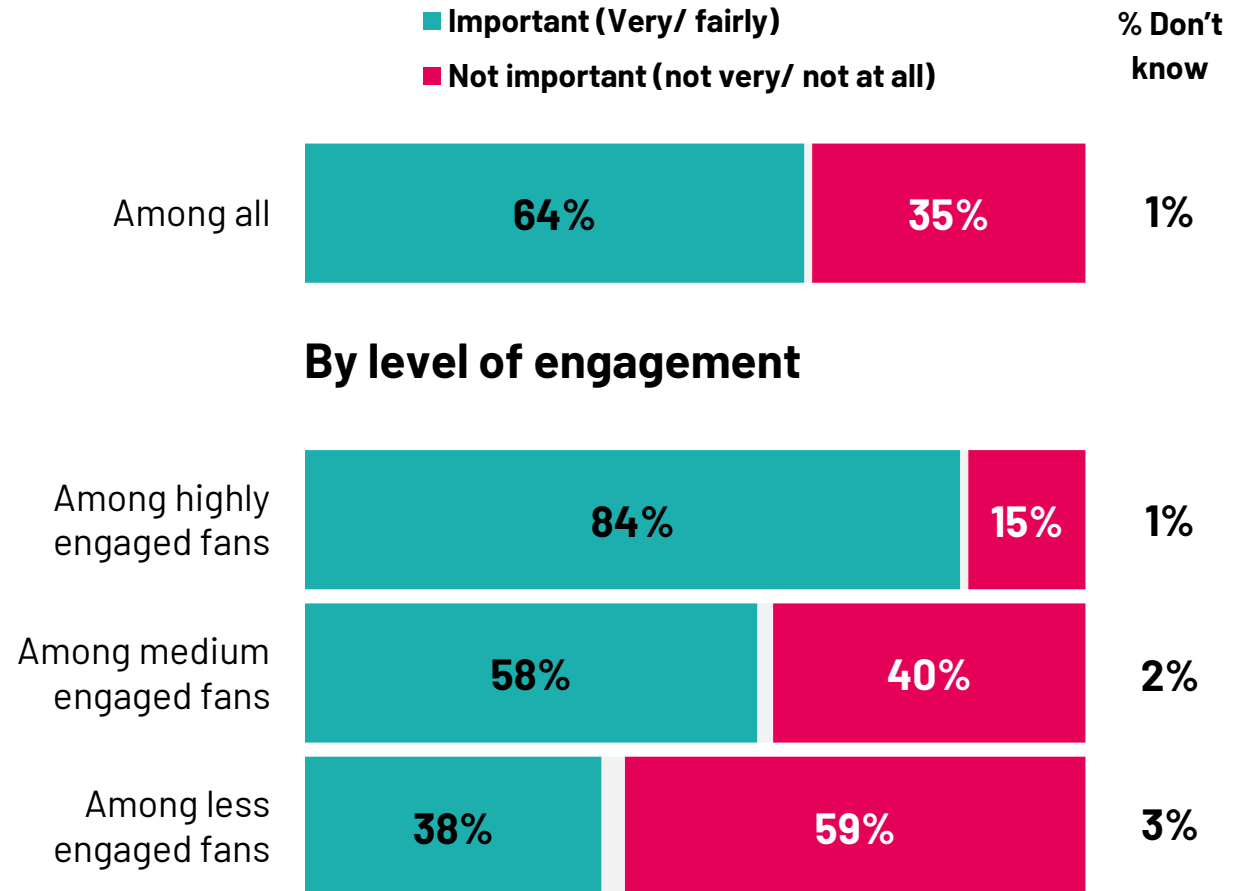


For most highly engaged fans, football defines who they are as person.

Over eight in ten highly engaged men's football fans (84%) say football defines who they are. This is 20 percentage points higher than among all men's football fans. Just 15% of highly engaged fans say football is not important to who they are as a person.

In contrast, less engaged fans are more likely to say that football is not important to who they are as a person (59%) than to say it is important (38%).

Q6. Thinking of men's football in England and Wales, how important, if at all, is football to who you are as a person?



Q6. Thinking of men's football in England and Wales, how important, if at all, is football to ...? Base: 1904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

Almost half of fans would never consider switching their support to another team.

Highly engaged fans are most likely to say nothing could make them switch (55%), compared to 35% of less engaged fans.

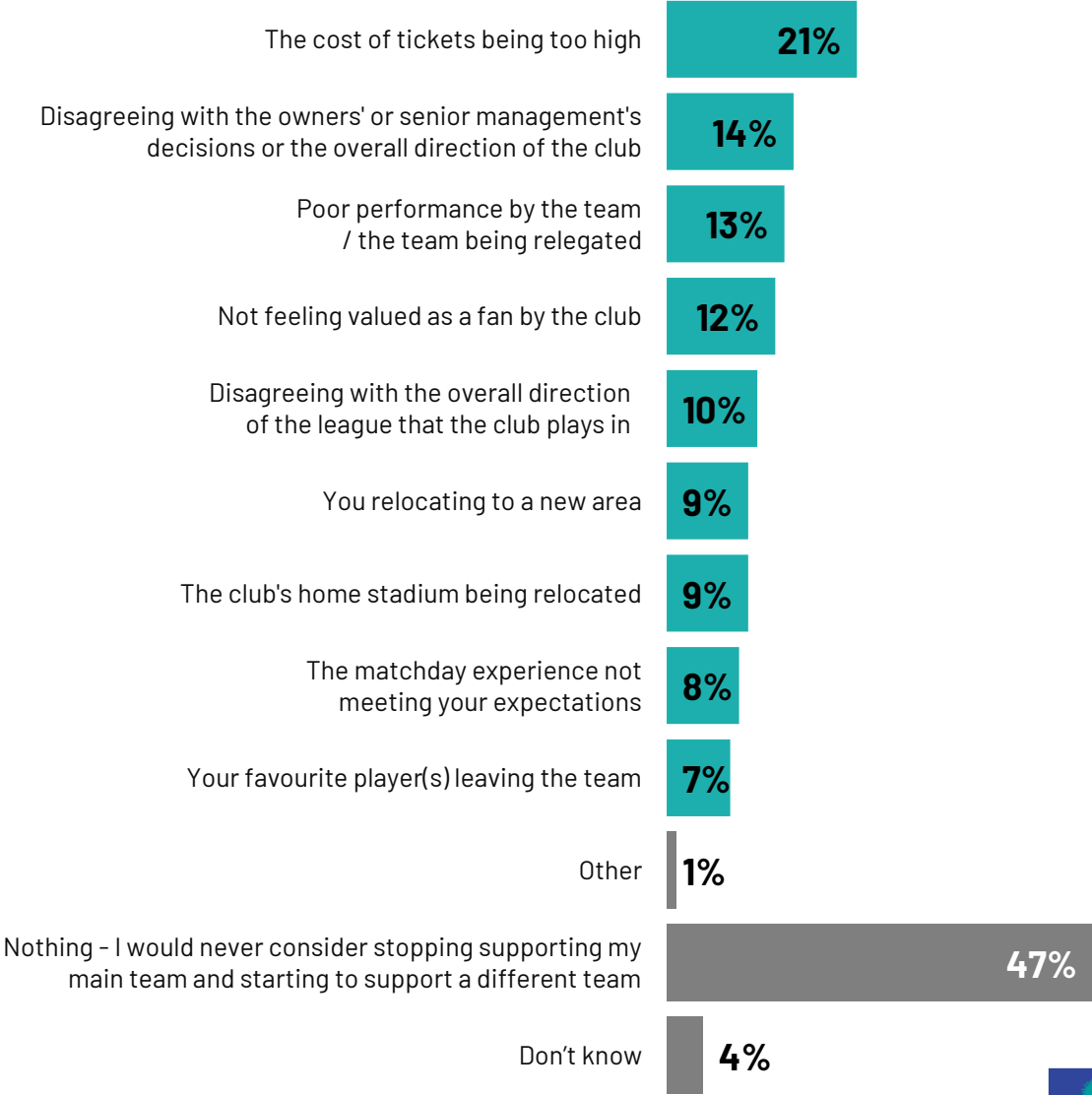
Among the factors that might prompt a switch to another club, the cost of tickets being too high is selected as the factor most likely to lead to a change.

Around one in eight fans (12%) note that not feeling valued could lead them to switch.

Q14. Which, if any, of the following factors do you think could lead you to stop supporting the main team that you currently support and to start supporting a different football team in England and Wales? Please select all that apply. Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

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Q14. Which, if any, of the following factors do you think could lead you to stop supporting the main team that you currently support and to start supporting a different football team in England and Wales? Please select all that apply



Within the focus groups, most fans reject the possibility of switching support, though some recognise potential situations upon further reflection

Fans typically did not understand how anyone could switch teams. This attitude ties back to why fans support their club; an inherent emotional connection that meant they could never change team under any circumstances. Some criticised “glory hunters” who swap between top teams, noting that this is not what football is about.

However, on reflection, and when prompted with potential scenarios, some fans identified factors that might draw supporters to another club:

- Fans discussed what would happen if their team folded, with some acknowledging that in this situation, and in the event of no phoenix club, then it may be a necessity to follow another team, though allegiance would likely still be with the original team.
- Fans understood that if someone moved to a different part of the country/overseas, then they might start to follow another team. However, this would not stop them supporting the original team to whom there would remain a strong connection and allegiance.
- Some noted that if children or grandchildren support another team, then fans might build some affinity with that club to share experiences (though again not necessarily affecting affinity to the original team).

“It’s an emotional connection that I have with the club and that emotional connection goes back many decades. It’s just inconceivable. There may be times when I would like to change, you know, I wish I could sometimes, but once you have that connection it’s a deep connection.” League Two/ National League, highly engaged fan

“I don’t see any reason why would I change my club. Obviously, I love entertainment, I love theatre, but that doesn’t make me change my clubs because I’ve been supporting Millwall pretty much for 20 years and I never supported any club before” Championship/ League One, highly engaged fan

“I think the only thing that could possibly cause you to really start supporting the new club and not the old is, is if it was to literally up sticks. Like the MK Dons scenario. I can’t think of any other situation, really.” Premier League, highly engaged fan

“Only if you moved abroad, maybe you still keep your old team, but if you wanted to watch some football and you lived in Spain, you might go and watch your sort of local team there and start to support them.” Championship/ League One, less engaged fan

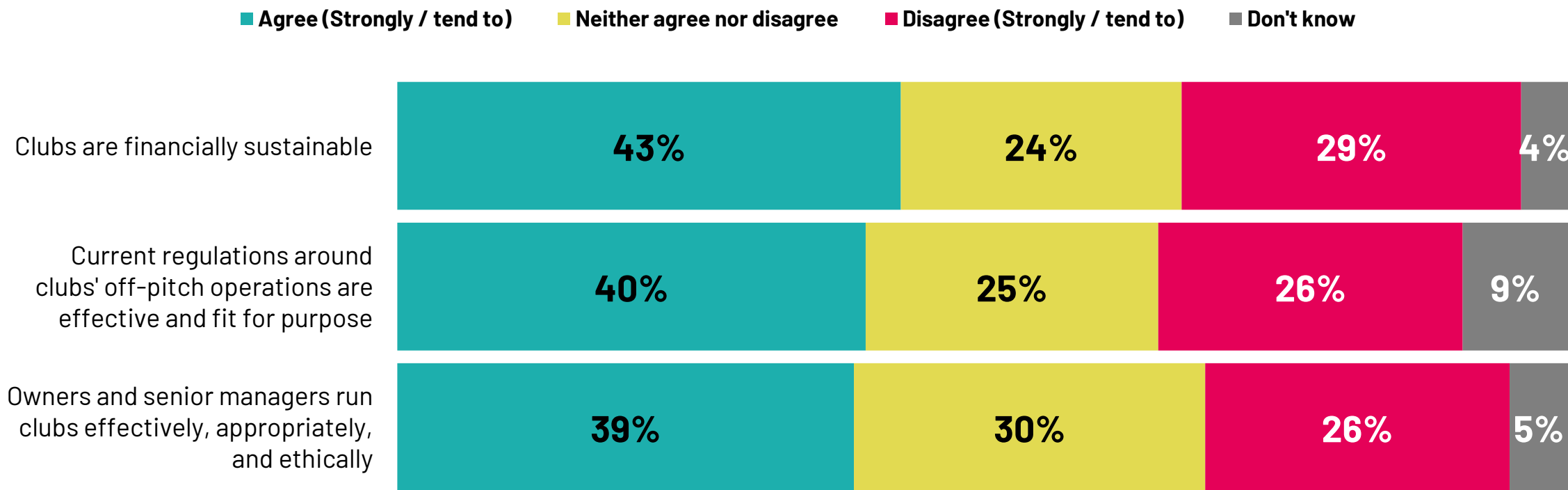
WHAT MATTERS MOST TO FANS

04

Within the focus groups, fans raised issues they felt were currently most important with regards to football in England and Wales. These fall into five broad categories:

Financial disparities and funding	Affordability and access	Ownership and governance	Commercialisation and fan experience	On-pitch issues
• The wealth gap between the Premier League and lower divisions • Concerns about clubs' financial sustainability • Money not filtering down to the lower leagues	• Ticket prices (season tickets and one-off tickets) • High matchday costs (food, travel etc) • Multiple (expensive) TV subscriptions required to watch games, including competitions like the FA Cup that many fans believe should be free-to-air. • Some fans are also frustrated that not all games are broadcast, notably Saturday 3pm games. • Increased push to digital only platforms – less accessible for older or less digitally confident fans	• Overseas owners who lack connections to the club and/or treat it purely as a business. • Perceived increase in numbers of “dodgy” owners • Concerns that regulations to protect clubs are not enough – citing recent liquidations as examples.	• Premier League clubs prioritising tourists over loyal fans, as they spend more on merchandise and the broader experience on matchdays. • Declining atmosphere, partly due to football tourism and fans being priced out, but also perceptions of a rise in threats of violence/ intimidating atmospheres • Racism and sexism in football • Frequent short-notice kick-off changes driven by TV scheduling. • Loss of 3pm kick off times	• Too much player power (e.g. demanding to be transfer listed/ wanting better contracts) and excessive wages • VAR • Agent influence

Fans are divided on club sustainability and oversight, with the majority either neutral or negative.



Q6A. Thinking of men's clubs in the top five divisions in England and Wales (Premier League to National League Step 1) and giving your overall view, to what extent do you agree or disagree with the following statements...?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

But fans doubt clubs' financial sustainability and whether owners run them properly.

Fans see financial sustainability and ownership as key issues in modern English football. Many reference recent examples of clubs where owners' have broken rules and faced punishment, with a perception that this is now more frequent.

Fans express frustration around how some owners prioritise treating clubs as businesses over helping fans and the club. Whilst fans understand that clubs are a business, they feel that some owners go too far and ask too much from fans, particularly in the higher leagues (and notably regarding the cost of tickets). Fans who feel their club has a "good" owner are grateful for them, citing how they listen to fans and don't run the club purely as a business.

Most feel the financial disparity between the biggest clubs and the rest is growing. Many question whether money is filtering down to all clubs in the way that is claimed by the higher leagues. Lower league fans are particularly critical, noting the financial struggles that their clubs often face.

"I think a lot of ownerships don't necessarily have fans at their like as their first thought... Not all of them, but a lot of them are there for money." Premier League, medium engaged fan

"I think the ownership model has changed over the last sort of little while. Is very much business focused. It doesn't seem like it's that a lot of the owners care about the fan bases a lot of the time." Championship/ League One, less engaged fan

"I was just listening to everyone's opinions there and it just made me reflect on how lucky I am having [Owner's name]. He's been there since we were in administration and we've had like consistency with him for 40 years. We've had a lot of ups and downs, but he's always been quite stable, quite reserved, he's never in the press, he's not dramatic. So I feel quite lucky with that. And we as a fan base have a lot of trust in our chairman... from what I'm seeing here and is when it's like a foreign owned chairman that they have, it seems to be the same feel detached from the club. So I just feel quite lucky that you know, we're not in that position." Championship/ League One, highly engaged fan

The perceived prioritisation of 'tourist fans' by Premier League clubs was illustrated as symptomatic of 'over-commercialisation'

Fans of Premier League clubs highlighted how their clubs increasingly prioritise "tourist fans", referring to fans who might attend one game a season but will spend far more on the ticket, as well as merchandise, kits and food/drink as part of the 'experience'.

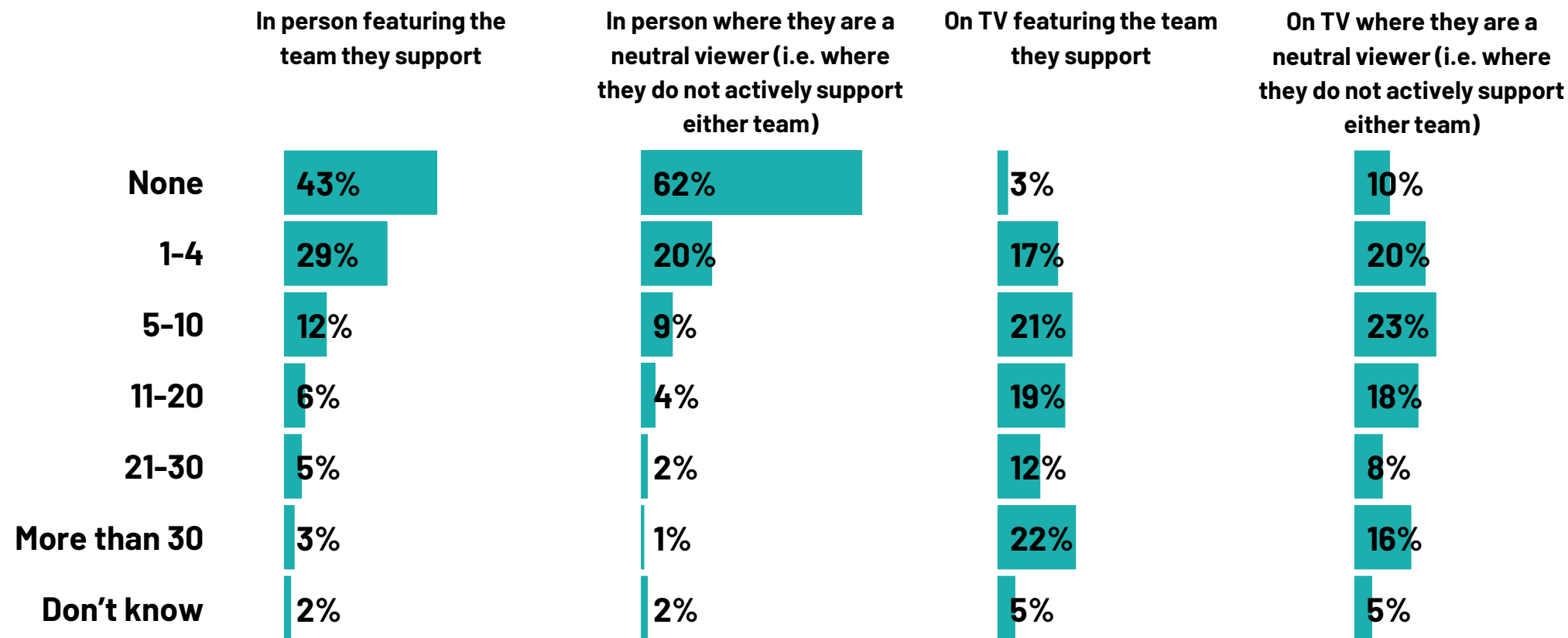
Fans pointed to examples of season ticket holders no longer being able to give tickets to friends or family, and clubs instead now reselling them for higher value. Fans warned that this dilutes the atmosphere at games, ironically a key factor which attracts the 'tourists'.

"I know the new stadium makes money and you've got 25, 000 coming on a Saturday, who are London tourists who are going to buy a football shirt because they're on holiday or they're going to buy a hot dog and drinks because they're on holiday for five days they're going to see a Premier League game." Premier League, medium engaged fan

HOW FANS ENGAGE WITH THEIR CLUB

05

Just over half (55%) attend live matches featuring their team at least once a season, compared to 36% who attend live games as a neutral viewer. The large majority watch both their own and other teams on TV.



Q7a/b - How many men's football matches in England and Wales do you attend in person/ do you watch on television (or another device) in a typical season involving a team you support?
 Q8a/b - And how many men's football matches in England and Wales do you attend in person/ do you watch on television (or another device) in a typical season where you do not actively support either team (i.e. you are a neutral viewer)?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

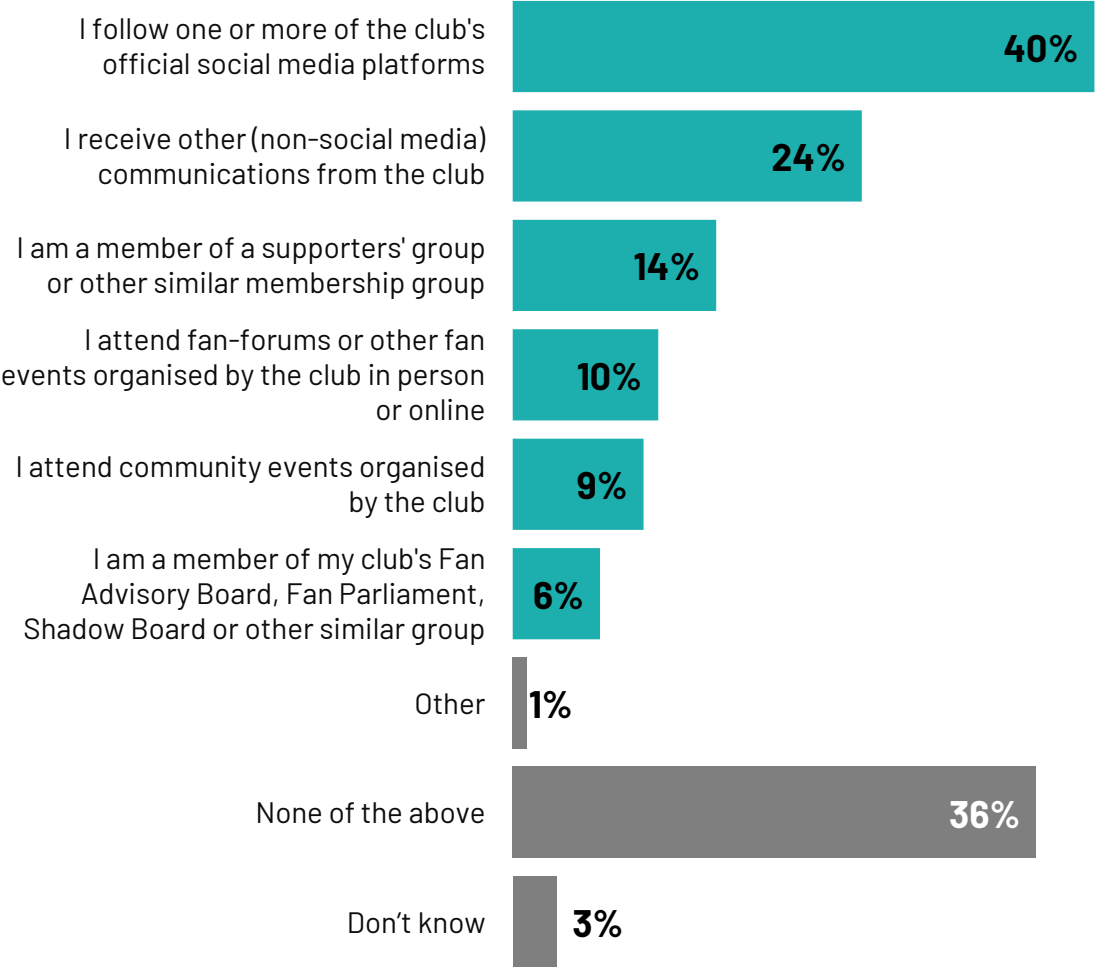
Beyond watching matches, men’s football fans most commonly follow their club on social media.

When asked about official club platforms/communications and affiliated supporter groups (rather than unofficial or non-affiliated sources), four in ten fans (40%) note that they follow their club via official social media platforms. This rises to 53% among highly engaged fans and drops to 28% among less engaged fans.

Highly engaged fans are also comparatively more likely to engage with other (non-social media) forms of communications from their club (33%) or be a member of a supporters’ group (22%).

Just over a third of fans (36%) do not interact with their club via any of the listed channels/activities. This rises to half (50%) amongst less engaged fans.

Q18. Outside of attending or watching the team’s games, which of the following ways, if any, do you currently interact with your club? Please only include official club platforms/communications and affiliated supporter groups, not unofficial or non-affiliated sources.



Q18. Outside of attending or watching the team’s games, which of the following ways, if any, do you currently interact with your club? Please only include official club platforms/communications and affiliated supporter groups, not unofficial or non-affiliated sources.

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026



Fans rely on online sources to follow their club, both club and fan-generated.

Within the focus groups, fans across leagues explained that social media is key for following their clubs. They value clubs sharing match news, offers and other updates via official social media platforms, though 'unofficial' social media sources are more frequently cited.

Fan-produced social media content helps fans feel closer to their club and fanbase. Fans cited groups across platforms where fans share news about their club as well as other informal updates.

In addition to social media, fans cited podcasts as increasingly important. This included podcasts about football in general where fans obtain information about the wider game, but also fan-created podcasts which provide alternative perspectives to club-produced media.

For lower league fans, local news sources are critical, as their clubs rarely feature in national media. Local news media keeps some fans up-to-date on key stories featuring their club.

"They put something on Facebook two or three times a day, so they'll be promoting the matches. They'll be telling you what's happening today." Championship/ League One, highly engaged fan

"Social media is the go-to for most of my club news. It's immediate and engaging." Premier League, highly engaged fan

"As someone who's not a massive fan and doesn't tend to like often watch like Talksport or like read it on the news, something like Twitter is a lot more accessible these days. I tend to just see general news on there rather than like going out and searching for it." Championship/ League One, less engaged fan

"I follow Oldham on their Facebook page. I'm also signed up to the fan website, so I get emails of upcoming things and obviously when tickets go on sale and stuff like that." League Two/ National League, Medium engaged fan

"For me to get my updates, I use podcasts. There's some really good ones out there at the minute for Middlesbrough. Local newspaper seems quite well informed with the club." Championship/ League One, highly engaged fan

Fan forums are highly valued by some, though tend to attract certain types of fans and sometimes can appear tokenistic.

Positives of fan forums and similar events:

- Highly engaged fans attend more often and value hearing directly from senior figures and sharing feedback.
- Fans who have attended feel these are important to show clubs listen to them.

Negatives of fan forums and similar events:

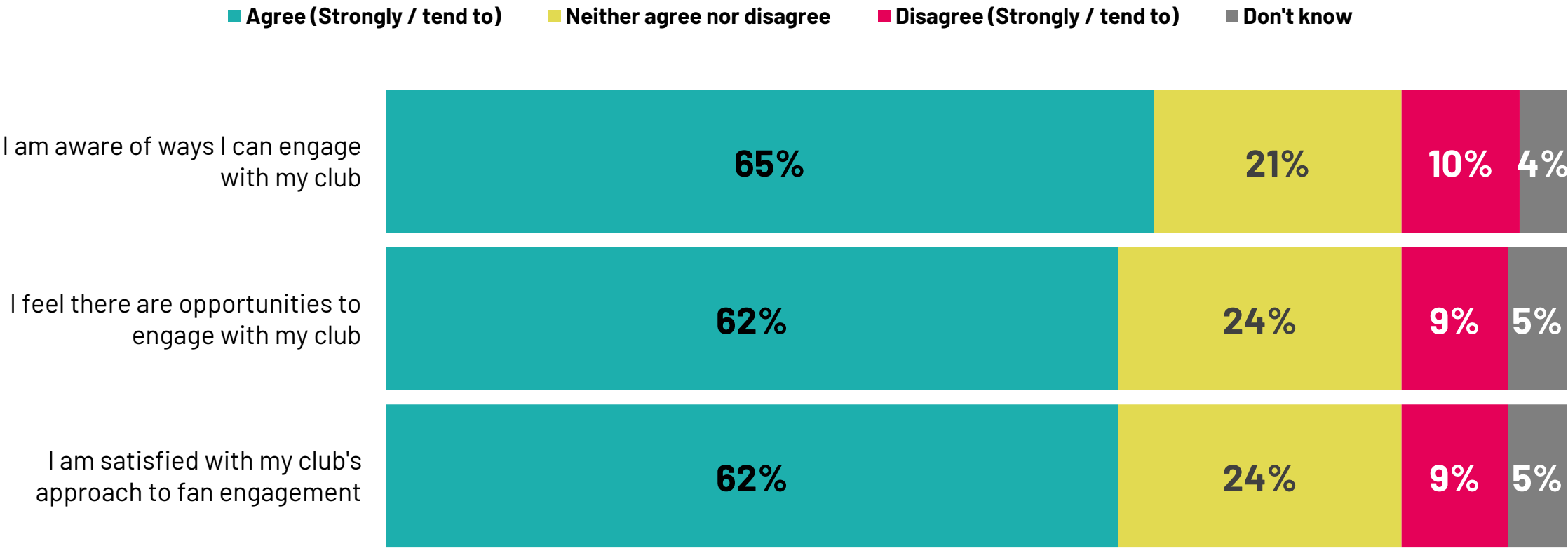
- Some fans suggested fan forums are tokenistic and exist only so clubs can appear to be doing the right thing.
- Less engaged fans are less likely to have attended these events. Some of these fans felt they are not “enough of a fan” for their opinions to matter.
- A lack of interest in attending.

“Fan forums are crucial - they make you feel like the club cares about what you think” Premier League , highly engaged fan

“[Club name] have got a fan forum which people go in and represent. But again, how much of it gets listened to, who knows? Nothing seems to translate much from that going onto the pitch or on into the facilities and the ground even.” Premier League, medium engaged fan

“I almost feel as though that I'm not almost at that level as a fan yet. I want to be involved with [their club], but it's mainly because like a lot of my friends are from [club name] and they support it and they kind of got me onto that bandwagon of support in that club. I feel like I'm not really at the point where I've watched enough games or I watch like the games enough to go into those kind of events.” League Two/ National League, less engaged fan

Around two thirds of men’s football fans know how to engage with their club, and a majority are satisfied with their club’s engagement approach. The remainder are typically neutral or unaware.



Q21. Thinking of men’s clubs in the top five divisions in England and Wales (Premier League to National League Step 1) and giving your overall view, to what extent do you agree or disagree with the following statements?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

The majority of men’s football fans do not feel valued and listened to by clubs.

Fewer than half (42%) of fans agree their club values and listens to them. The majority do not agree (56%), with three in ten (31%) fans actively disagreeing that their club values them, and a further quarter (25%) noting they are neutral or don’t know.

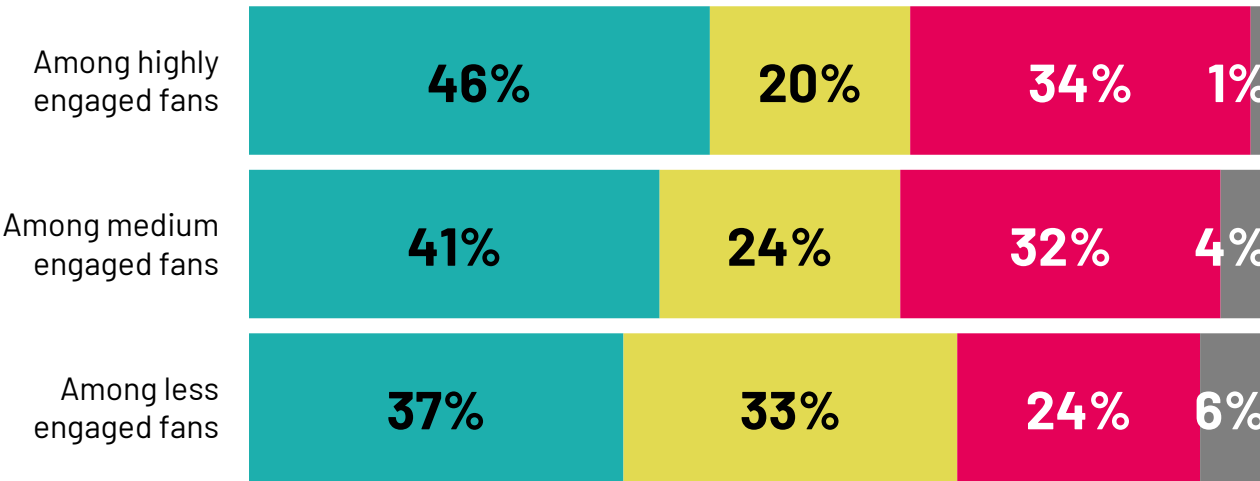
Highly engaged fans follow a similar pattern, though with slightly higher levels of both agreement (46%) and disagreement (34%). Fewer are neutral/don’t know.

Q6A. Thinking of men’s clubs in the top five divisions in England and Wales (Premier League to National League Step 1) and giving your overall view, to what extent do you agree or disagree with the following statements... Fans are valued and listened to by clubs?

■ Agree (Strongly / tend to) ■ Neither agree nor disagree ■ Disagree (Strongly / tend to) ■ Don't know



By level of engagement



Q6A. Thinking of men’s clubs in the top five divisions in England and Wales (Premier League to National League Step 1) and giving your overall view, to what extent do you agree or disagree with the following statements...?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026



Discussion in focus groups highlighted scepticism about whether clubs truly listen.

Fans feel clubs inconsistently value and listen to supporters. Participants cited some notable examples of clubs listening to fans, including the response to the fans' protests around the proposals for the European Super League (though others noted that this also illustrated a lack of understanding of fans' views from the outset). However, fans generally remained sceptical at how often clubs really listen to their fans, feeling that clubs often act so that they can be seen to be doing the right thing.

Fans across the leagues felt that lower league clubs are more likely to listen to their fans, noting that they have a closer connection with fans and with smaller crowds, rely more on their supporters.

Premier League clubs feel more distant, with a larger gap between fans and senior leadership who make the key decisions.

Fans also referenced fan-owned clubs, like AFC Wimbledon, or the 50+1 model in Germany, where fans have more say in how their clubs are run. Some cited this as the most effective way of ensuring supporter voices are heard.

"We're in a quite a good position at [club name] where the club do liaise with fans quite a bit. So we are in a privileged position"
League Two/ National League, highly engaged fan

"Larger clubs have more layers, which can dilute how much our voices are heard."
Premier League, highly engaged fan

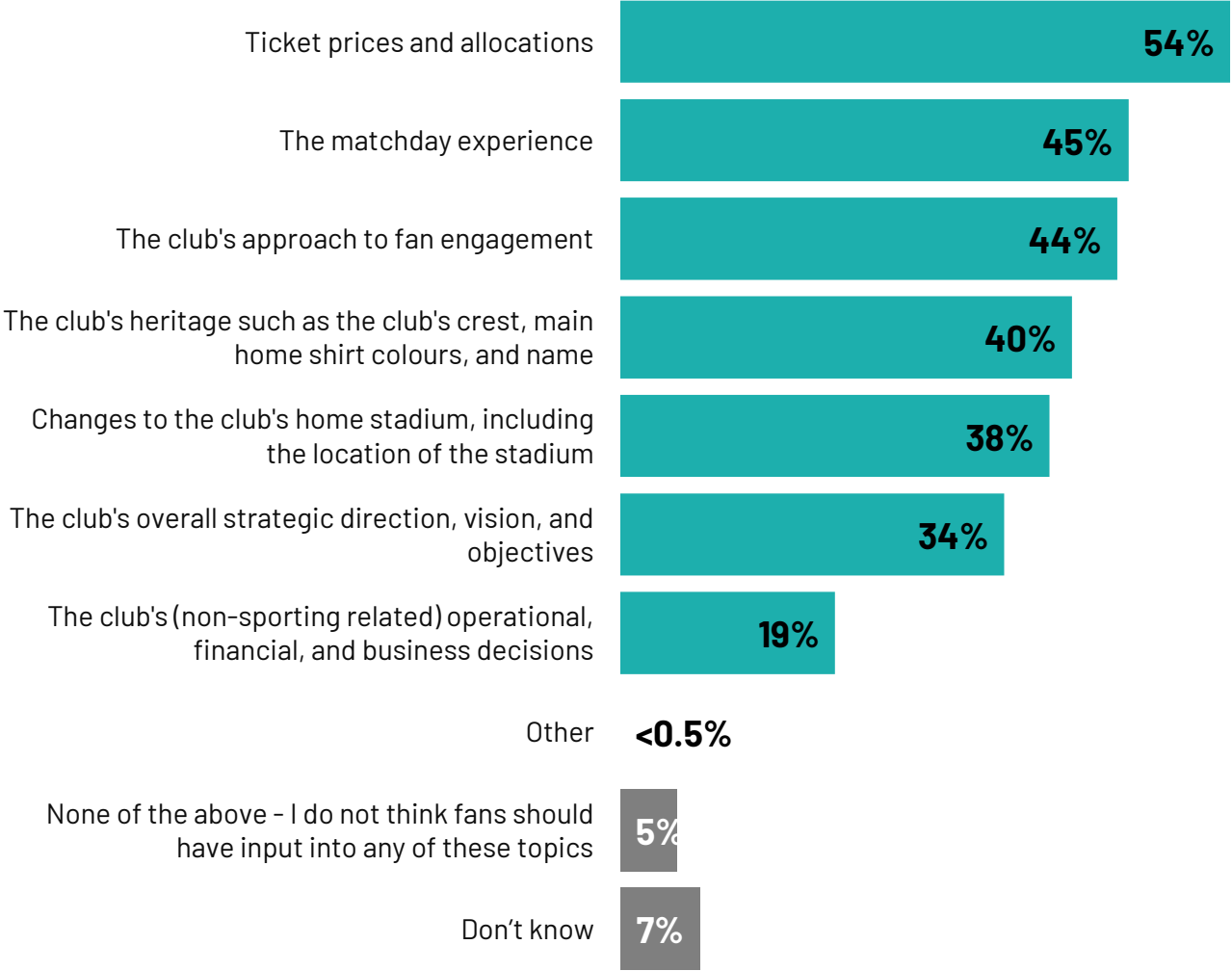
"I think the lower league clubs do, yeah, because they're reliant on the fans. They can't, you know, they're not getting the income from the FA or the TV deals that don't exist. So they have to do a lot more work with the fans."
League Two/ National League, less engaged fan

Fans most want a say on ticket prices and allocations.

Over half (54%) select ticket prices and allocations when asked which topics are most important that fans have a say on through fan engagement. This is followed by the matchday experience (45%) and the club's approach to fan engagement (44%).

Around four in ten fans feel it is important that they have a say on the club's heritage, including the club crest, kit colours and name (40%) and changes to the club's home stadium (38%).

Q19. Thinking about the team you support, which of the following topics do you think it is important that fans have a say on through fan engagement?



Q19. Thinking about the team you support, which of the following topics do you think it is important that fans have a say on through fan engagement?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026



Discussions within the focus groups also prioritised ticket prices

The focus on ticket prices was driven by a perception that prices at many leading clubs have become too expensive for most fans and are continuing to rise at unaffordable rates. This is felt to be impacting on the profile of fans who attend games and the (dampened) atmosphere in some grounds.

Fans also noted how they felt it was important to have a say on changes to club 'heritage', including stadium moves and any potential changes to kit and/or badge. Fans see themselves as the custodians of their club and want a say on any proposed changes to these critical aspects of their club.

However, while fans want consultation on these issues, many doubt it would influence owners.

"I've seen ticket prices go up an awful lot over the past sort of four or five years and it's one of the reasons why I, I haven't, you know, I don't go very regularly now", Championship/ League One, less engaged fan

"I would say it would be really good to have fans on board for the things like the ticket prices. Obviously, you know, it's impossible to give the best prices to fans as they ask, but I appreciate, you know, some clubs have got more financial power and then they can, you know, change their ticket prices a little bit. I think most of us have been speaking that the tickets are usually affordable. I'm of the same opinion." Championship/ League One, highly engaged fan

"I think it's important but I think some of the bigger clubs have sort of lost that identity with their shirts and their badges because, because of advertising and they've got to have. I don't know how many different types or styles of shirts they have these days but I, you know you can remember back in the days like back in the 1970s you would identify with the club through their shirts". League Two/ National League, medium engaged fan

HOW FANS ENGAGE WITH LIVE FOOTBALL

06

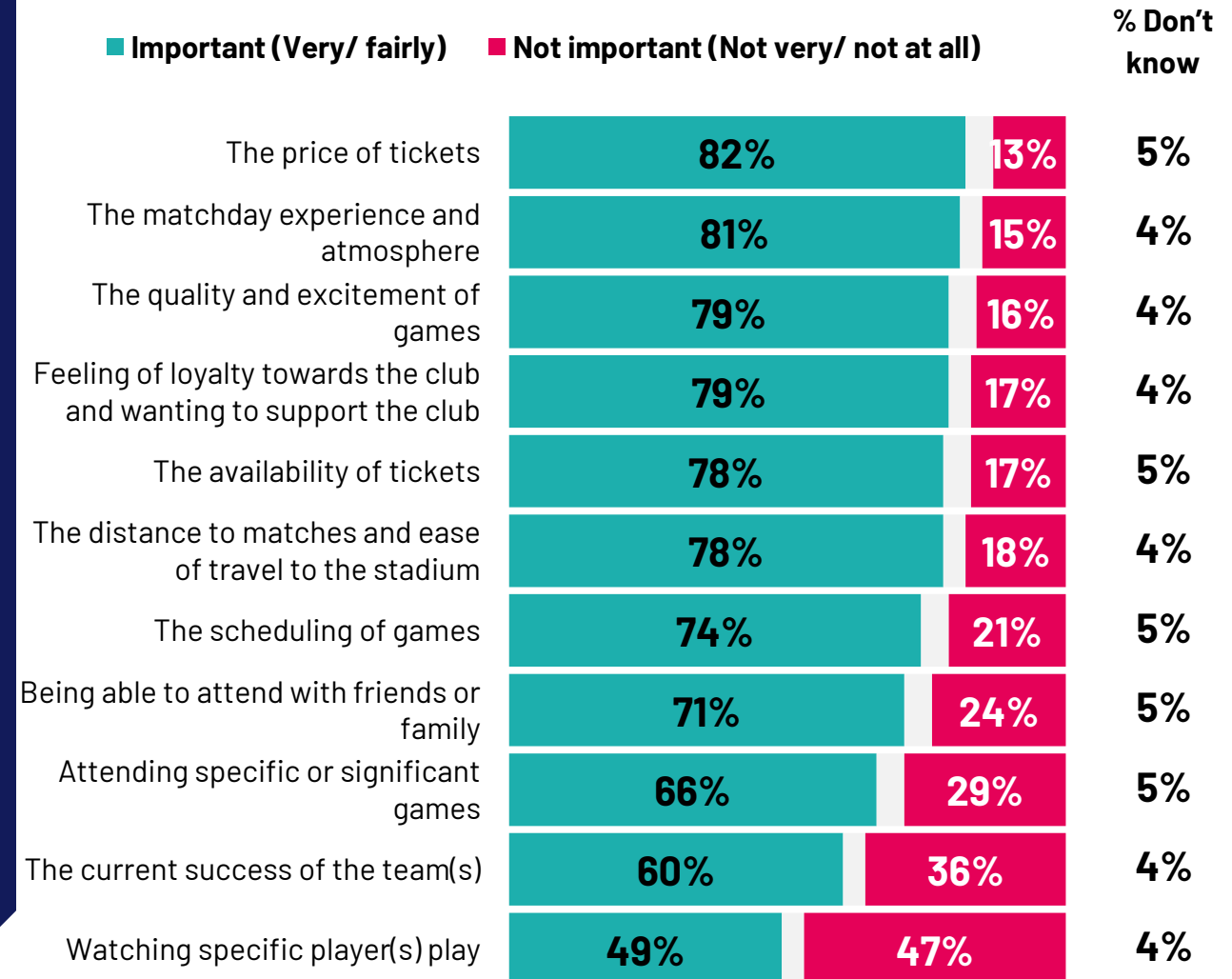
Ticket prices, matchday atmosphere and quality of games are key drivers to in-person attendance.

Around eight in ten fans say the ticket prices (82%) and matchday experience/ atmosphere (81%) are important in determining the number of matches they attend in person.

These are followed closely by the quality/excitement of games (79%), loyalty towards the club (79%), availability of tickets (78%), and the ease of travel to the stadium (78%).

Current success of the team (cited by 60% as important) and watching specific players (49%) are comparatively weaker factors.

Q9. How important, if at all, are the following factors in determining the number of football matches you attend in person in a typical season?



Q9. How important, if at all, are the following factors in determining the number of football matches you attend in person in a typical season?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

Why fans attend: Irreplaceable atmosphere, family bonds, and club loyalty

The matchday experience is irreplaceable. Live football offers a unique atmosphere that broadcasts cannot replicate – from the in-person energy and visibility to the sense of occasion. The sport's unpredictability means fans might witness rare, memorable moments that define seasons.

Football connects families and communities. Match attendance can be deeply embedded in family routines, bonding generations through shared traditions. Beyond family, stadiums provide rare spaces where people from all backgrounds unite around their club, strengthening local community ties.

Loyalty transcends performance. While sustained good form encourages attendance, dedicated fans' loyalty persists regardless of results. This obligation to support is strongest among lower league fans, who feel their presence directly helps their club survive and value their closer connection to players.

"You're supporting the club, you're helping it to survive, and at the same time, you're. You're chasing that poison chalice of actually enjoying the success when it does come along." League Two/ National League, highly engaged fan

"Football's unpredictability and the anticipation of what could be drives my support" Premier League, highly engaged fan

"Just to be there and feel that atmosphere and that rush when, when the ball hits the back of the net and everything and just that whole experience of just feeling like you're involved for 90 minutes." Premier League, less engaged

"It sounds very basic but it's the most prominent thing I can say is that it's a family thing. It's just going to continue, I feel as it's a role for me to pass on down to my future generation, obviously as only being 18, but when I therefore have children to pass on for my grandfather who learned it from his dad." Premier League, highly engaged fan

Cost, scheduling issues, and lifestyle commitments limit match attendance

Key barriers to attending more matches:

Cost extends beyond tickets. While ticket prices are significant, the total matchday expense – transport, food, drinks, merchandise – creates an unaffordable day out, especially for families.

Unpredictable scheduling disrupts plans. Frequent kick-off changes affect all fans regardless of engagement level, making planning difficult and inflating last-minute travel costs. Some have missed games they've already purchased tickets for due to fixture changes.

Lifestyle and alternatives compete. Work and family commitments limit attendance, particularly for less engaged fans who have other interests and increasingly rely on TV coverage. Poor team performance further deters less engaged fans, though doesn't affect highly engaged supporters.

Solutions fans want:

- Affordable pricing. Some clubs' £1-£5 ticket initiatives are welcomed
- Simpler access. Remove complex membership platform requirements
- Reliable transport. Address costly and unreliable travel options

"Monday night football and Friday night football and midweek football and very little at 3 o'clock on a Saturday, you know, it makes it very difficult. I'm retired and I still struggle to get to some of the games" Premier League, medium engaged fan

"It is just a massive time commitment, especially on the weekend... you're almost out for the whole day and if you lose, it almost ruined your weekend" Championship/ League One, medium engaged fan

"I would go if I was available but more often than not there's so many other things to do" League Two/ National League, less engaged fan

"It can be down to the costs for people. If they don't live locally or something, they get in the train. If I was to jump on the Metro, that would be my boy. It probably cost me about 12 pound return. But for some other people, like on a train from, say from, I don't know, Nottingham to Manchester, it's going to cost them a lot of money." Premier League, less engaged fan

"I think it's just the cost that's the main thing. Like if, if match tickets were cheaper, if trains were cheaper, if food and drink around the stadium was cheaper, I think a lot of fans would definitely go a lot more". Championship/ League One, less engaged fan

HOW FANS ENGAGE WITH FOOTBALL ON TV

07

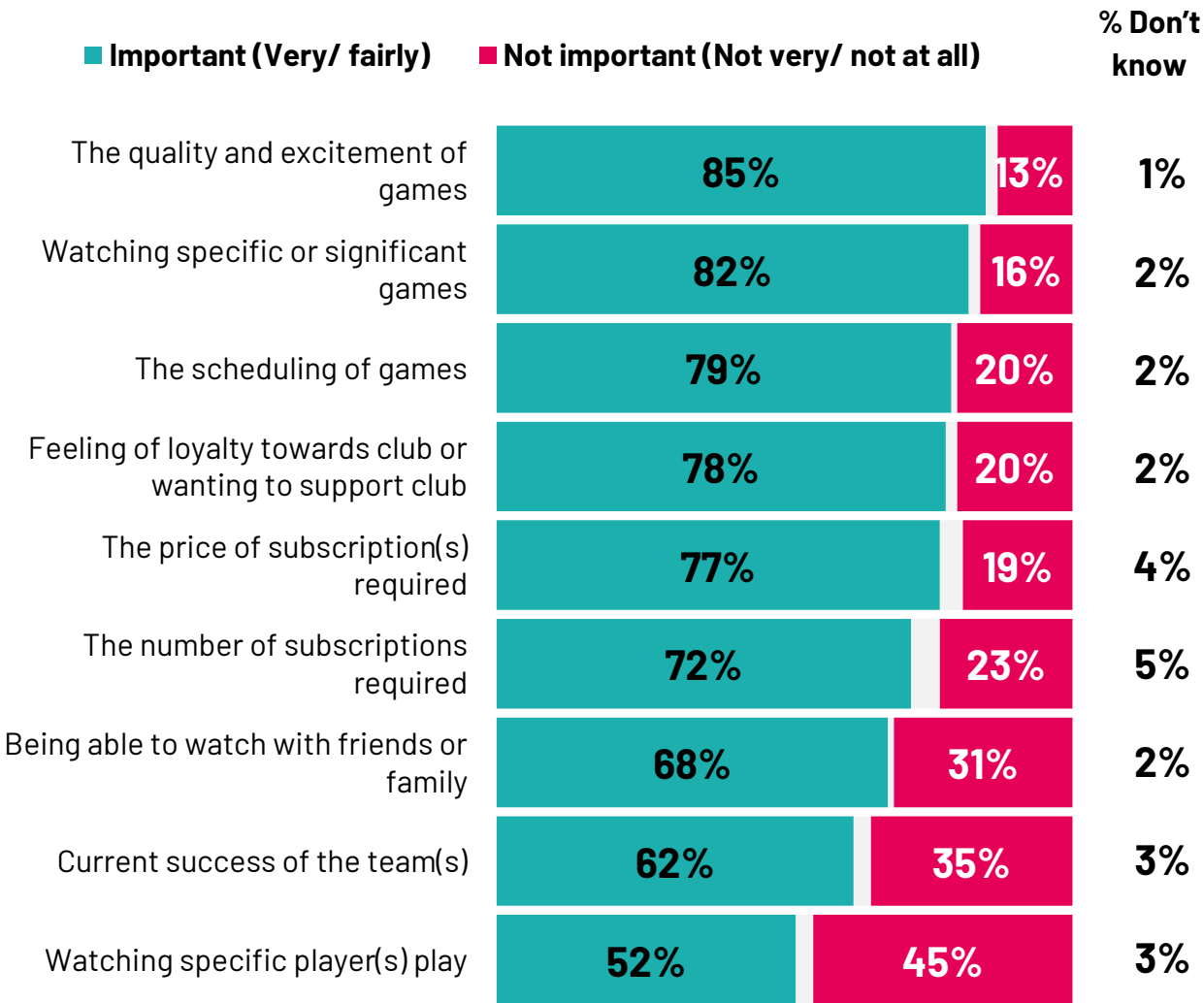
Quality and excitement of matches, and access to specific matches are key drivers to TV viewing.

Over eight in ten fans say game quality and excitement (85%) and watching specific/significant games (82%) are key factors determining the amount of football they watch on TV.

A similar majority of fans say scheduling of games (79%) and club loyalty (78%) are also important factors.

Subscriptions play an important role in how many matches fans watch on television: 77% say the subscription prices is an important factor, and 72% similarly select the number of subscriptions required.

Q10. How important, if at all, are the following factors in determining the number of football matches you watch on television (or another device) in a typical season?



Q10. How important, if at all, are the following factors in determining the number of football matches you watch on television (or another device) in a typical season?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026



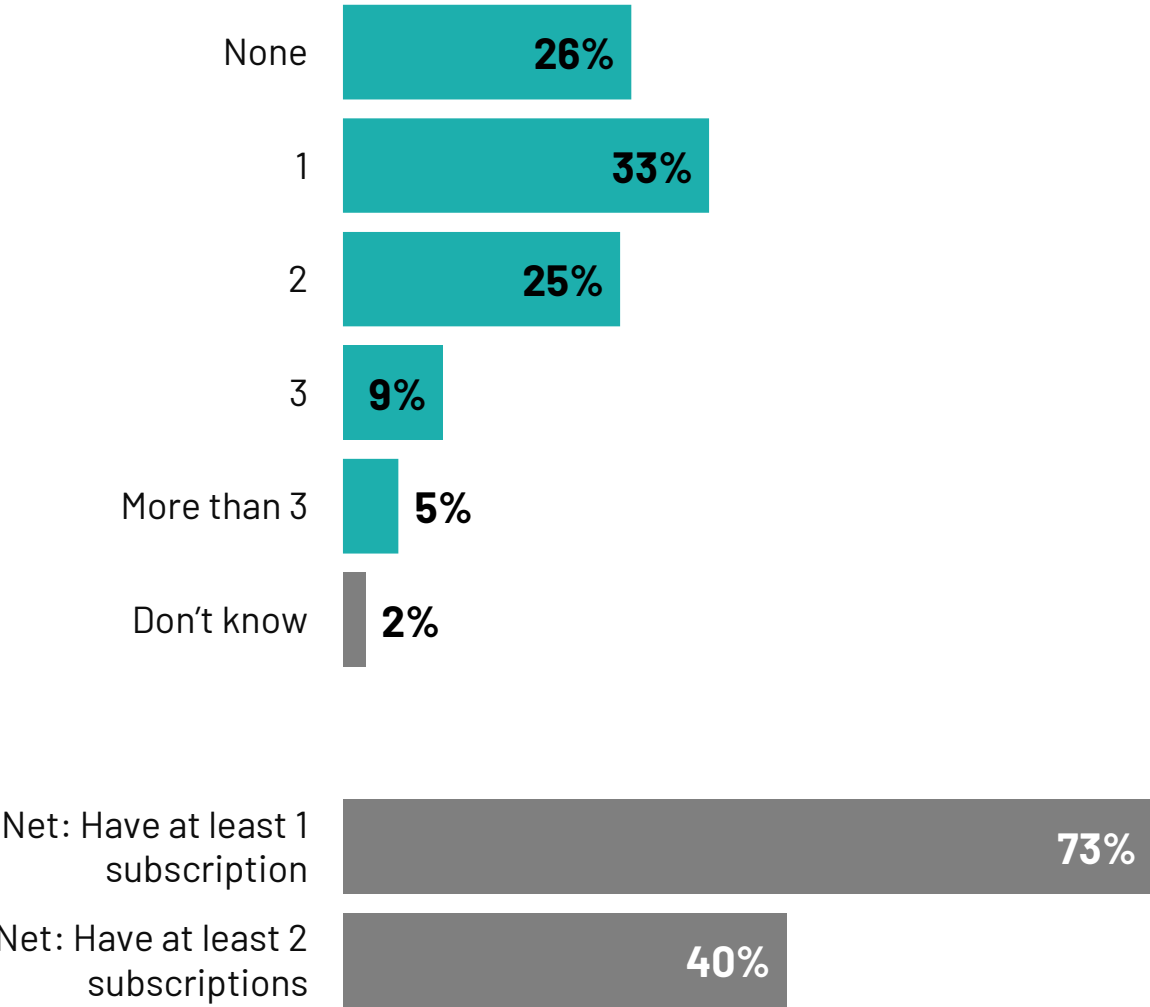
Around three-quarters of fans pay for at least one subscription to watch men’s football in England and Wales.

Around three-quarters of football fans (73%) currently pay for at least one subscription to watch men's football. One in three (33%) have one subscription, a quarter (25%) have two, 9% hold three subscriptions, and 5% have more than three.

40% of fans subscribe to more than one service, while 26% report paying for no subscriptions.

Highly engaged fans are more likely to have at least one subscription (81%), with half subscribing to more than one service (51%). In contrast, over a third of less engaged fans (36%) do not pay for any subscriptions to watch men's football.

Q11. How many paid monthly / annual subscriptions (e.g. Sky Sports, TNT, Amazon Prime, Club TV, DAZN) does your household currently pay for in order to watch men’s football in England and Wales on television?



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Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

TV viewing reveals three fan types – all frustrated by subscription model

Different viewing profiles emerged:

- Ardent enthusiasts – Watch everything available, multiple games weekly across all competitions (mainly highly engaged fans)
- Loyalists – Prioritise their own team, supplementing with highlights on TV/social media
- Occasionals – Only tune in for major events (World Cup, Euros, FA Cup)

Universal frustrations with the subscription model:

Poor value perception. Multiple expensive subscriptions required, yet many games unavailable despite being broadcast abroad – primarily due to the 3pm blackout in England and Wales. Fans following just their own team struggle to justify costs, while those attending matches or those with other commitments see subscriptions as wasteful.

Making it work. Some fans cope by sharing costs with family or justifying through other sports content – though acknowledge this is precarious if circumstances change.

Access concerns for football's future. The move to some FA Cup games being shown on a subscription channel exemplifies concern about free-to-air coverage disappearing. Fans fear this will damage football's long-term health by preventing young people and families from easily

accessing the game.

"A lot of games, probably like three or four a week. Super Sunday, it's almost like tradition in my family. We might end up going to the pub or to my grandparents' house." League Two/ National League, highly engaged fan

"Some of the FA Cup games, there's hardly any FA Cup on TV at the weekend." League Two/ National League, highly engaged fan

"The price of subscriptions is kind of ludicrous now." League Two/ National League, less engaged fan

"I think a lot of people can't watch the number of games that they used to watch just because of how much the likes of Sky and TNT charge now. I don't think a lot of people can subscribe to it because it's just too, too expensive." Premier League, highly engaged fan

"I think a big one this year has been for me has been the FA cup on TNT Sports. It's known as the People's cup. Yet now we've got to pay an extra subscription fee to watch half of it. I think it's on BBC and it was on terrestrial TV before, and I think it's better for the smaller clubs that is on those as well, because those people aren't necessarily going to pay for your subscriptions because their team aren't on the TV and it's not sort of worthwhile." League One/ National League Fan

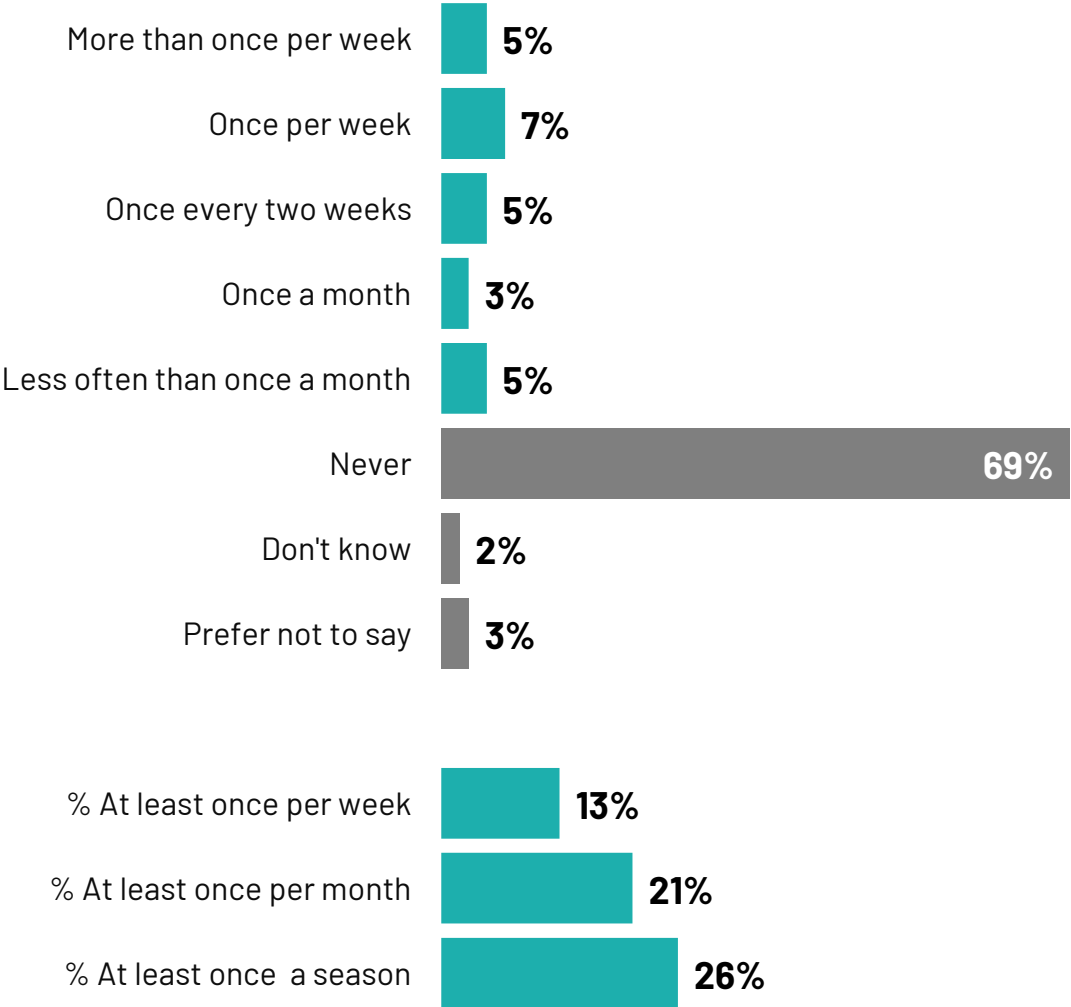
One in five fans (20%) say they watch matches via pirated or illegal means at least once a month

Fans were asked how often they watch football matches via pirated or illegal means, including modified Fire Sticks, illegal streaming websites and IPTV services.

Around a quarter (26%) say they watch football via pirated or illegal means at least once a season, with one in five overall (21%) watching via these means at least monthly, and 13% at least once a week during a typical season.

Around seven in ten (69%) say they never watch matches via pirated or illegal means.

Q12. During a typical season, how often, if at all, do you watch football matches via pirated or illegal means?



Q12. As you may or may not know, there are ways in which people in the UK can watch live football illegally by accessing certain websites and devices. This means they can watch a wide range of football, including matches broadcast in the UK and matches not broadcast in the UK, without paying for subscriptions. This includes modified Fire Sticks, illegal streaming websites and IPTV services.

During a typical season, how often, if at all, do you watch football matches via pirated or illegal means?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

HERITAGE

08

Fans had varying views around the meaning of 'heritage' in a football context, though most equated it with history. Other themes emerged during discussions:

The origin of the club and links to local area	Historic players and performances	The stadium	The team colours and badge	Other matchday traditions
- When the club was founded - Origins of the club - Links to the local community - The background and 'story' of the club	- Key players before their time - Players they grew up with - Historic matches and seasons that stand out	- Stadium location - Stadium infrastructure (the look and feel of the stadium) - The stadium name	- Historic kits - The traditional kit colours - The traditional badge	- Pre-match songs - Club-specific chants - Matchday traditions
<i>"It's about their story. That's what connects them to their community. It's like their story, really. So I know West Ham, it was like ironworks and it then gives you some kind of identity linked to the club" League Two/ National League, less engaged</i>	<i>"Heritage syncs with history, doesn't it? So you look at the golden era or, when things were great or when it was booming" Premier League highly engaged fan</i>	<i>"I've only ever known Kenilworth Road so moving somewhere else would be fairly difficult for me to still know. I know it's the same club but it'll just be difficult to know this is where a new beginning essentially." Championship/ League One, highly engaged fan</i>	<i>"Seeing the red and white stripes of Lincoln City. When a team's been around since 1884, you can't change the strip. Yeah, the away one, absolutely, go for it. Change it all you want. But not the home one." Championship/ League One, medium engaged fan</i>	<i>"It's random but everyone walks out the ground singing along to it, whether they're 80 or 8. It's what you want to hear, especially if you've been on a bit of a drought of winning." League Two/ National League, highly engaged fan</i>

Six in ten (59%) men’s football fans agree that club heritage is well protected.

Six in ten (59%) fans agree that club heritage is well protected, compared to 17% who disagree and 24% who either don’t have a view either way or ‘don’t know’.

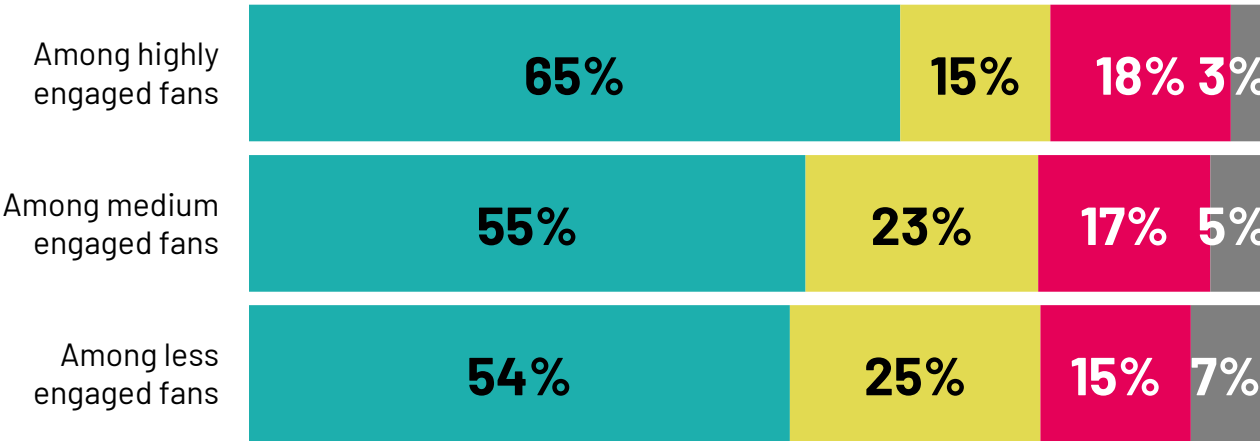
Highly engaged fans are more likely to agree (65%), while medium and less engaged fans are slightly less likely to agree (55% and 54% respectively).

Q6a. To what extent do you agree or disagree that Club heritage is well protected?

■ Agree (Strongly/ tend to) ■ Neither agree nor disagree
■ Disagree (Strongly/ tend to) ■ Don't know



By level of engagement



Q6A. Thinking of men’s clubs in the top five divisions in England and Wales (Premier League to National League Step 1) and giving your overall view, to what extent do you agree or disagree with the following statements...?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10–14 April 2026

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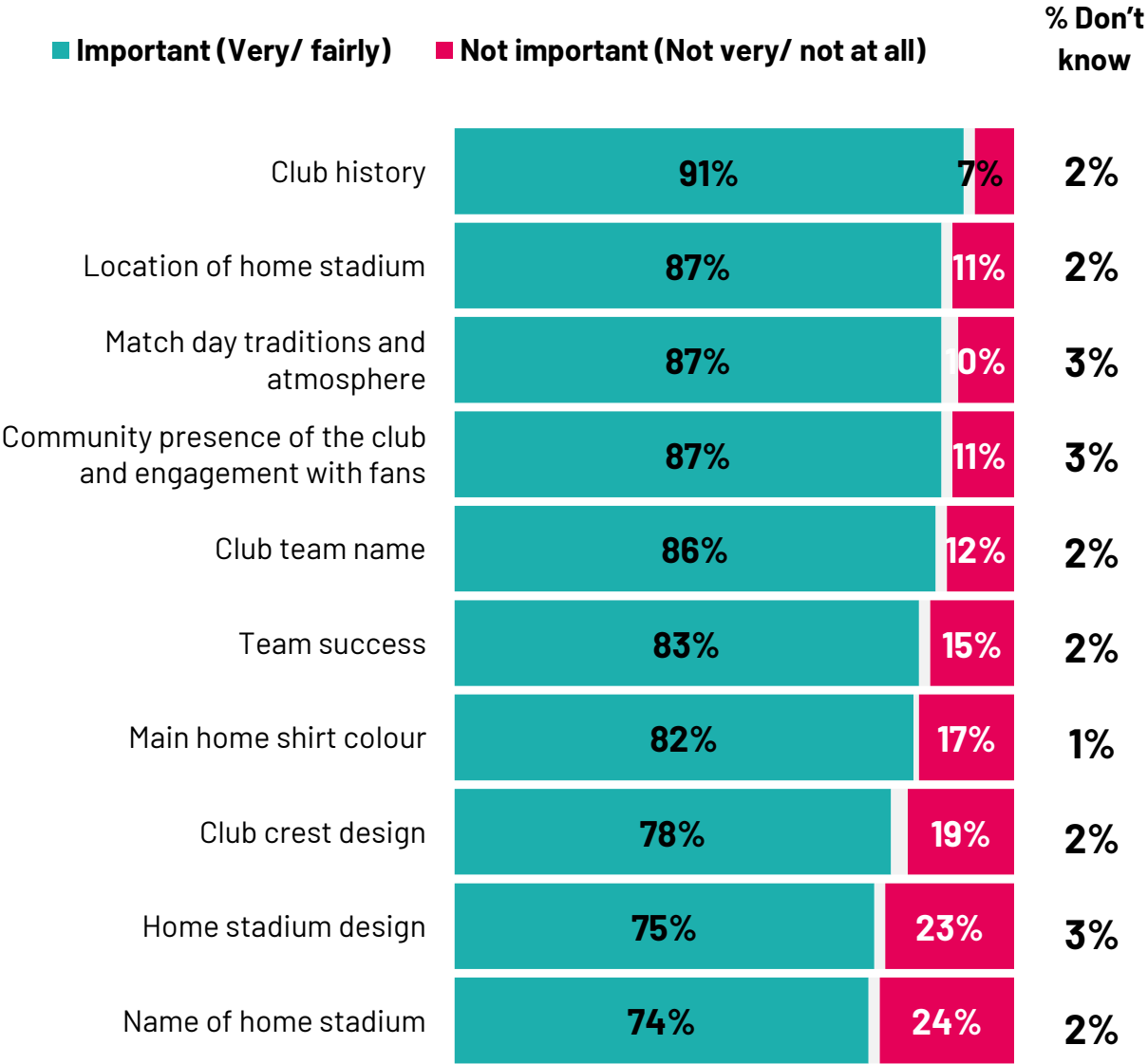
Most aspects of a club's heritage are important to football fans, particularly history, location and traditions.

The majority of fans – 74% or more – rate all aspects of their club's heritage as being important to them personally (when presented with a list of different factors).

The club history is most likely to be selected as important (by 91% of fans), followed by stadium location, matchday traditions/atmosphere and community presence (all noted as important by 87%).

Three-quarters of fans view the stadium name (74%) and design (75%) as important.

Q20. How important to you personally, if at all, are the following aspects of your club's heritage?



Q20. How important to you personally, if at all, are the following aspects of your club's heritage?

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Stadiums embody heritage through memories, with fans needing to adapt to change

Survey results confirm stadiums are crucial to heritage (87% cite location as important, 75% value stadium design). Fans in the focus groups similarly viewed historic grounds as intrinsic to club identity – sites where memories form and communities gather.

Mixed reactions to relocations. Fans whose clubs have relocated report divided feelings. Some feel the loss acutely, citing diminished atmosphere and the disappearance of a key identity element. Others acknowledge that while old ground memories remain precious, new stadiums can develop their own heritage through better facilities and fresh traditions.

Names matter less than places. Stadium naming rights generate less concern – fans continue using original names regardless of corporate branding, preserving linguistic heritage even as commercial realities change.

"It's the history of the club and the memories you have and they built up over a period of time. And it doesn't matter what's happening on the pitch now, you will always support that club, whoever is in charge and whoever the managers and how poor the players are. And although you get relegated, you will still go and support that club in a championship or Division 1 or 2 or National League. And I think that's what. That's what the heritage is about, the history club. It's a love for the club. Not necessarily. Not necessarily the now or what's happening in the future." Premier League, highly engaged fan

"The old stadium it felt like everybody there was loud and, and that kind of rubs off on the crowd. So I think it makes a big difference maybe on the results, the atmosphere, the overall kind of enjoyment. A lot of people kind of mythologize that old stadium and that experience." League Two/ National League, medium engaged fan

"I think when someone moves to a new stadium, it can take away a bit of the history and what's happened there, the memories of what's happened there. If you've been there certain things have happened whilst you've been there. They can be core memories and core areas for you". Championship/ League One, less engaged fan

TESTING THE BOUNDARIES OF LOYALTY

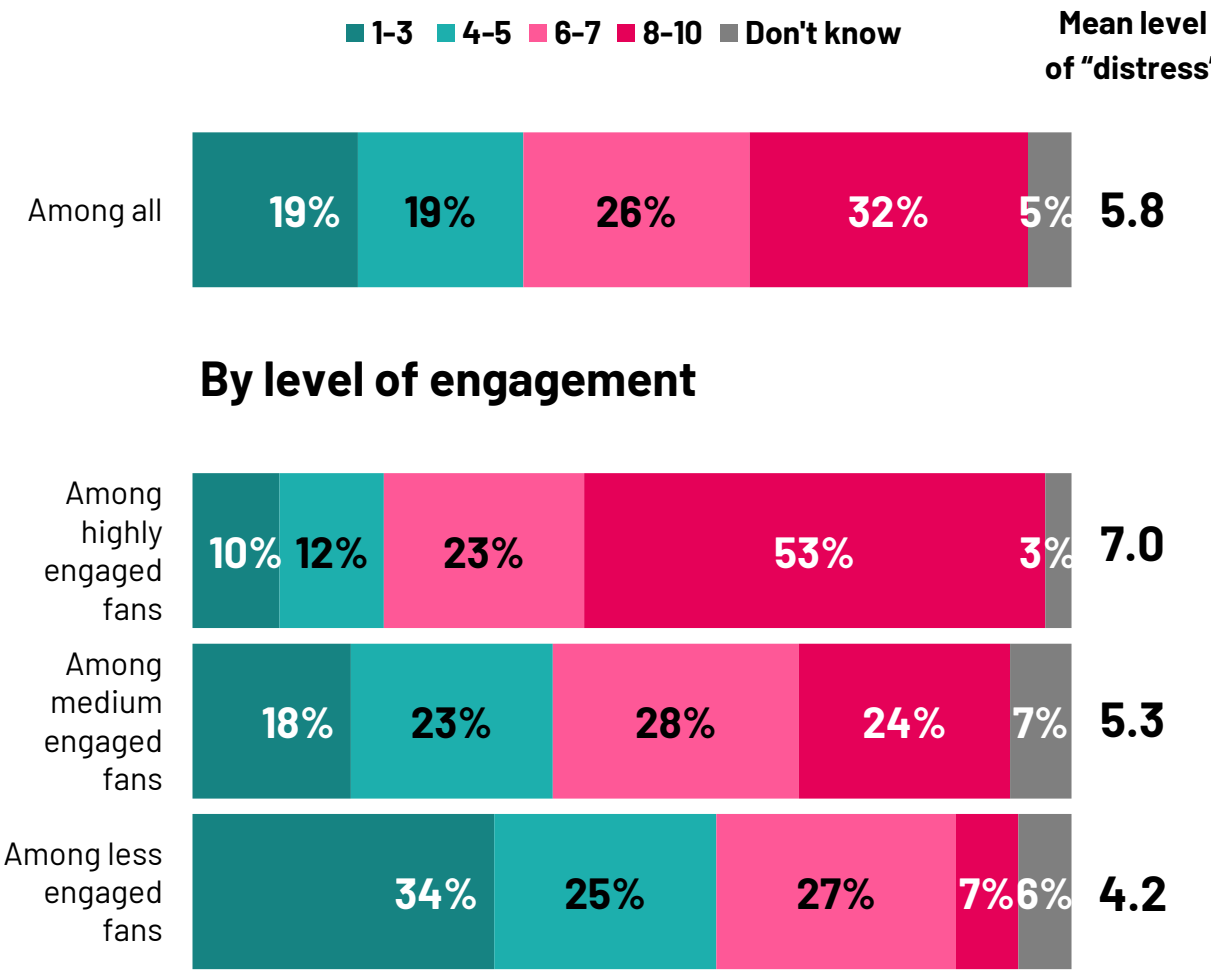
09

Highly engaged fans would be most distressed if their club ceased to exist.

When fans were asked how distressed they would feel if their club was dissolved and ceased to exist, around three in ten (32%) indicate a high level of likely distress, giving a score between 8-10 on a scale of 1-10, with 10 being extreme emotional distress. At the other end of the scale, 19% note a score of 1-3. The mean rating for perceived level of distress if a club ceased to exist was 5.8.

Levels of perceived likely distress rise the more engaged a fan is. Highly engaged fans have a mean distress level of 7.0, compared to an average of 4.2 among lower engaged fans.

Q17. And if your club was dissolved and ceased to exist, how much emotional distress, if any at all, do you think you would feel? Please answer on a scale of 1-10, where 1 is No distress at all and 10 is Extreme emotional distress



Q17. And if your club was dissolved and ceased to exist, how much emotional distress, if any at all, do you think you would feel? Please answer on a scale of 1-10, where 1 is No distress at all and 10 is Extreme emotional distress

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Highly engaged fans are more likely to take action if their club was at threat of being dissolved.

Over half (56%) of men's football fans would consider taking some action if their club faced the threat of being dissolved. This rises to 70% among highly engaged fans and drops to 45% among less engaged fans.

The most likely actions that fans would consider taking would be to raise awareness through participating in events, meetings or online posts (25%), and/or to join the supporters' trust/association (21%).

Around one in ten fans (11%) would consider boycotting matches or purchases from the club to campaign for new ownership.

	Among all	Among highly engaged	Among medium engaged	Among lower engaged
Raise awareness or support for the club by participating in fan or community events, attending meetings, or posting online.	25%	33%	19%	20%
Join the supporters' trust / association	21%	29%	18%	13%
Make monetary donations to help the club	17%	22%	15%	13%
Make more purchases from the club	17%	22%	14%	12%
Participate in fan protests	16%	24%	11%	10%
Volunteer time to help the club	15%	21%	12%	9%
Boycott matches or purchases from the club to campaign for new ownership	11%	15%	9%	8%
Other	<0.5%	<0.5%	0	<0.5%
None of the above	30%	19%	38%	40%
Don't know	14%	11%	16%	15%

Q15. Several men's football clubs have been dissolved following financial difficulties, such as Macclesfield Town in 2020 and Bury FC in 2023. If your club faced financial difficulties and the threat of being dissolved, which of the following actions would you consider doing, if any?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026

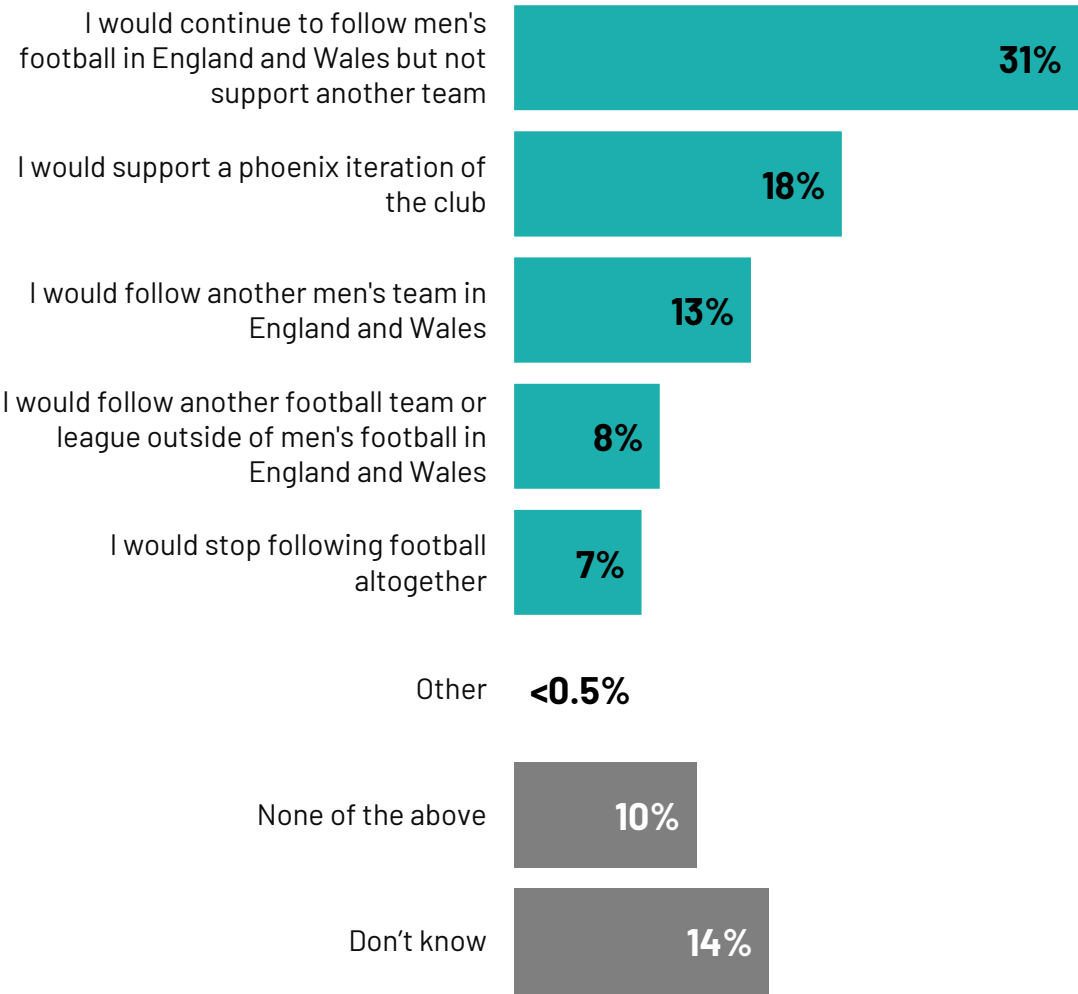
Fans would most likely not support another team if their club was dissolved.

Around three in ten men’s football fans (31%) say they would continue to follow men’s football in England and Wales but would not support another team in the event of their club ceasing to exist.

Almost one in five (18%) say they would support a phoenix iteration of the club they support. Highly engaged fans are more likely to say they would support a phoenix club (24%, compared to 7% of less engaged fans).

Overall, 13% say they would follow another team in England and Wales, whilst 7% would stop following football altogether.

Q16. If the team you support was dissolved and ceased to exist, which of the following would you be most likely to do?



Q16. If the team you support was dissolved and ceased to exist, which of the following would you be most likely to do?

Base: 1,904 English or Welsh football fans 16+ who support a team in the top 5 leagues in England and Wales, online, 10-14 April 2026



As part of focus group discussions, scenarios were presented to fans to understand how fans would react to potential drivers to switching clubs.

Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
<i>"Very little has changed with the wider infrastructure of the club. The stadium remains the same and the core identity of the club remains the same. However, due to on field performances, the club has been relegated twice within the past five years. This means the club is at a level that is below where the club would traditionally be".</i>	<i>"Due to off the field decisions and changes, the club you support is faced with liquidation. There are rumours of a phoenix club forming that will adopt elements of the club you currently support. But it is technically a new entity and will start at a significantly lower level".</i>	<i>"The club you support has been taken over by a new owner. You do not agree with their priorities for the direction of the club. This includes the types of signings the club is making and staff they are hiring to manage the club. Alongside this they have suggested moving to a new stadium in the same area".</i>	<i>"The club you support is to be renamed and moved elsewhere in England and Wales. Alongside this the kit and badge are rumoured to be changing. However, this club will retain the history and legacy of the old club, despite the changes".</i>	<i>"Nothing happens to the club you support. They continue to perform as they have done over the past 10 years. However, you move further away and more travel is required to attend games regularly".</i>

Fans in focus groups were asked about five scenarios and were asked to consider what they would do. Fans would typically not support another team, except in the most extreme circumstance where the club rebranded and relocated.

	Response
Scenario 1: Club is relegated multiple times	Relegation doesn't break bonds. Most fans across leagues and engagement levels do not think multiple relegations would lead them to support another club. Many recounted experiencing this themselves or could identify examples from other clubs. While some may attend fewer matches or buy less merchandise, support continues.
Scenario 2: Phoenix club formed after liquidation	Phoenix clubs retain support. Most would follow a phoenix club, with Bury/Macclesfield cited as precedents. However, heritage retention is crucial - without it fans might not follow the new entity. Some did note they would not follow the phoenix club, having no interest in following football at the lowest level.
Scenario 3: Disagreement with new owner's priorities	Ownership changes are tolerated. Fans tended to feel that an unpopular ownership, coupled with a move to a new local stadium, would not stop them supporting their club. Participants cited examples of clubs facing similar situations and highlighted how regular changes in players, owners, and managers tend now to be largely expected. Despite this overall attitude, fans reflected that rather than stopping supporting the club altogether, some may engage to a lesser extent.
Scenario 4: The club moves location and changes its name and identity	Identity loss is the red line. A scenario in which relocation is combined with rebranding is, by far, the most likely to lead to loss of support for the club. Fans cited the examples of Wimbledon and MK Dons, as well as franchises in American sport, which was something fans were eager not to see happening to football teams in England and Wales. Most felt that even retaining some heritage elements wouldn't preserve loyalty after such fundamental changes.
Scenario 5: The fan moves further away	Moving away may lead to less engagement but would not impact allegiance. Fans related to the scenario of moving further away from their team, though did not see it as a barrier to continued support. Highly engaged fans said they would still travel for games wherever possible or may go to more away games instead. Some fans suggested if they moved, they might end up going to games involving other teams that were now more local to them, though they would still support their original club.

Ashley Ames
ashley.ames@ipsos.com

Ben Roff
ben.roff@ipsos.com