

Supporter Feedback on Covid19

(Premier League Restart & Attending Next Season)

MUST

June 2020

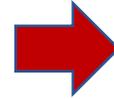
Background

- To help back up our representations to the club on fan issues related to Covid19 we wanted to provide some clear evidence and feedback from supporters. We conducted a small snapshot survey prior to our first post-lockdown meeting in March and undertook this second, more detailed, survey to inform our follow up meeting in early June.
- The objectives of the research was to understand:
 - The scale of concerns around personal health and finance and to test potential solutions to them, particularly around new season ticket renewal options.
 - Supporter perceptions of the club's overall approach to Covid19.
 - Supporter attitudes to restarting the current season that the Premier League had asked for feedback on.
- Fieldwork period 2nd – 7th June. Targeting match-going fans, both MUST Members and Non-members were invited to participate via email and via social media.
- We had received 2931 fully complete responses by the time of this analysis, creating a good representative profile of match-going supporters.
- We have shared this report and all open comments with club decision makers, alongside offering potential solutions to supporter concerns.
- All information has been fully anonymised.

Key Take Outs:

1

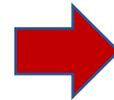
Perceptions of the club's reaction during COVID-19 are positive. Both overall and towards supporters



Continue to promote what the club has done during the crisis. This has potentially influenced renewal behaviour

2

81% of season ticket holders are still to renew. Around a quarter (23%) of all season ticket holders want to renew, but have health or affordability concerns

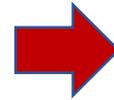


Supporters need reassurance/communications detailing:

- What circumstances will reactivate the renewals process alongside what that will be
- What renewal options will be available to supporters, in particular those with affordability or health concerns
- How concerns around affordability and health will be addressed (i.e. How social distancing will work within the stadium)
- How the club intends to issue tickets to those who want to attend. This will no doubt be contentious, i.e. should priority be given to those with Platinum, Gold, Silver etc.

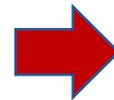
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Just under a third of season ticket holders (31%), who are still to renew, would react positively to a flexible arrangement or a sabbatical (A quarter of all season ticket holders)



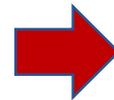
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Feelings are mixed about re-starting this season behind closed doors. As is starting next season behind closed doors



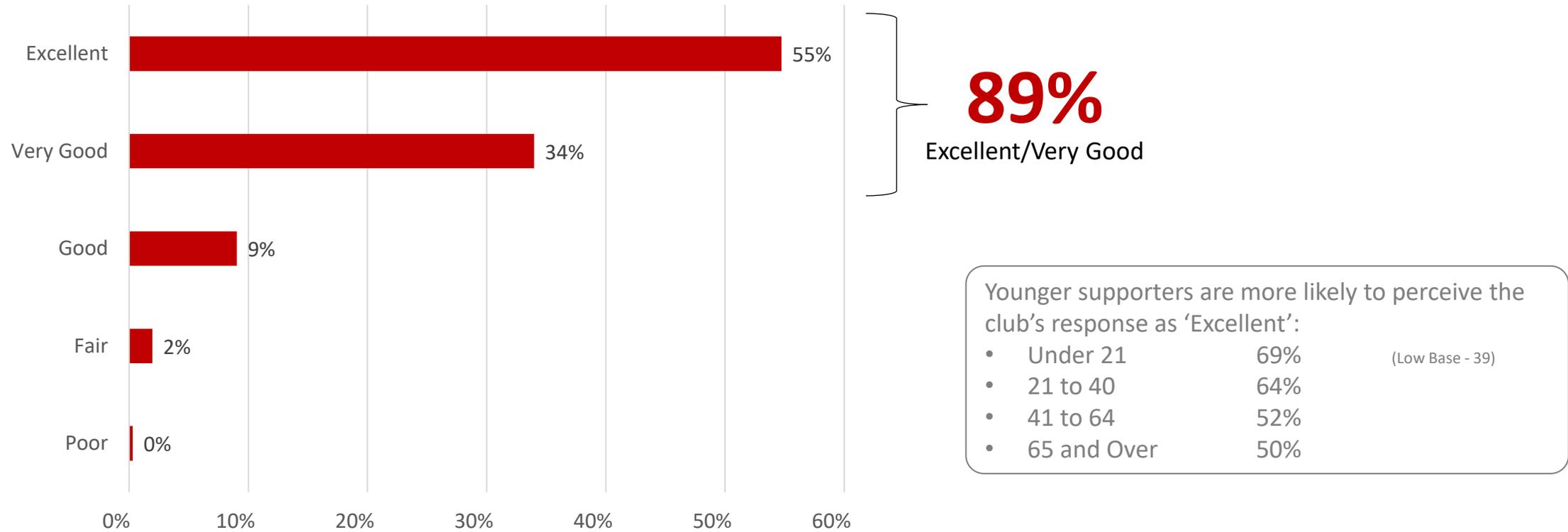
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The majority of supporters are willing to participate in a phased return.



Supporters Perceive the club's response to COVID-19 as strong

Q1: Overall, how would you rate Manchester United's response to the COVID-19 crisis?

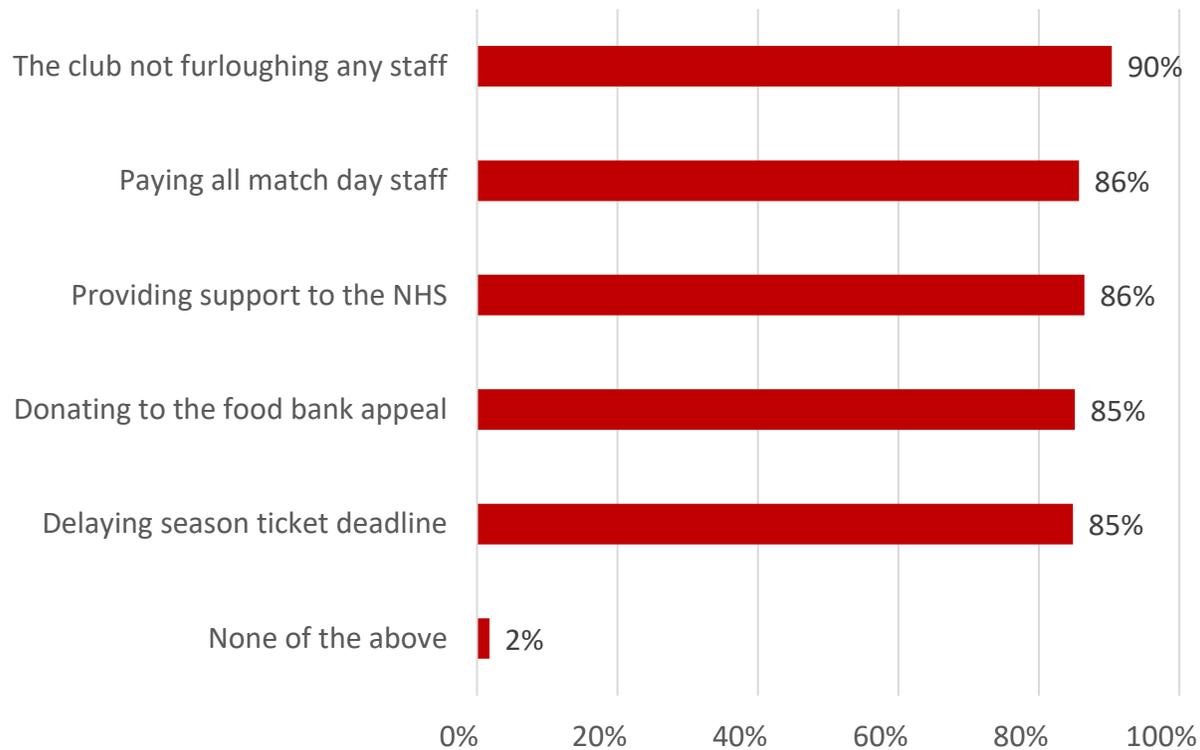


Base: All Supporters 2931

NB: No differences by supporter type (i.e. STH, Member)

Awareness of club COVID-19 initiatives is also high

Q2: Which of the following, if any, were you aware of?



Awareness of initiatives are significantly higher amongst:

- Season ticket holders
- Those season ticket holders who intend to renew

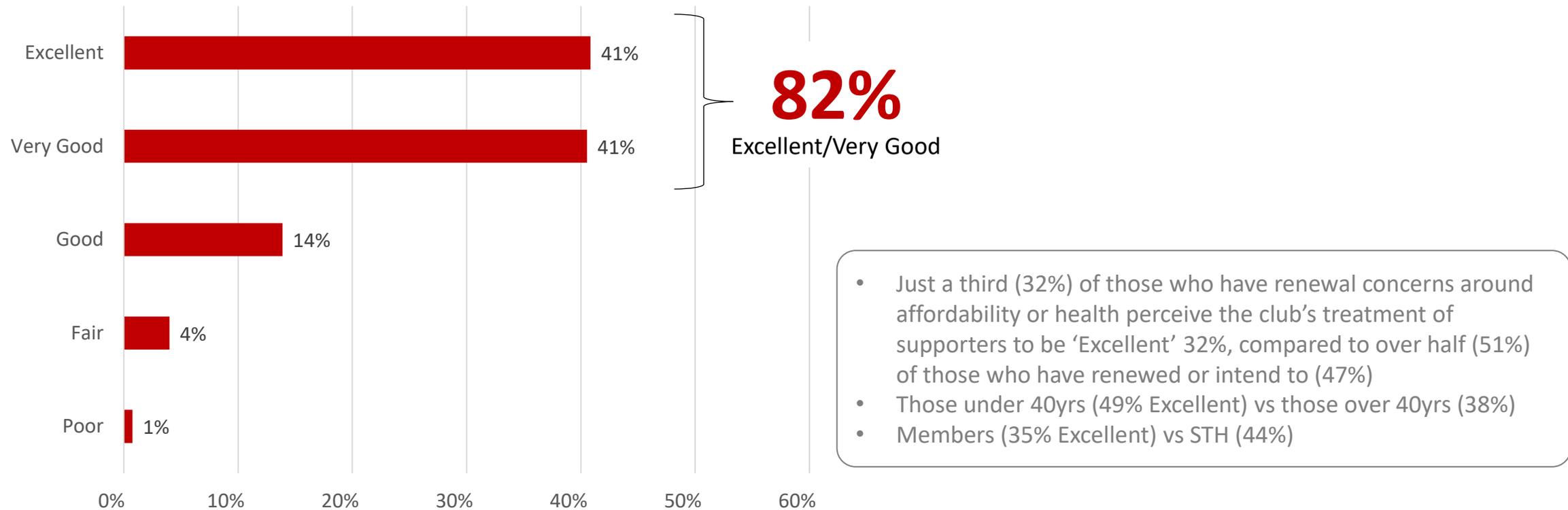
Awareness of initiatives are significantly lower amongst:

- Official Members who haven't attended games
- Those who rated the clubs treatment of supporters as fair/poor

Base: All Supporters 2931

Again, perceptions of the club are high. However, clear some supporters are less positive i.e. those with health or affordability concerns around renewal. Communication required.

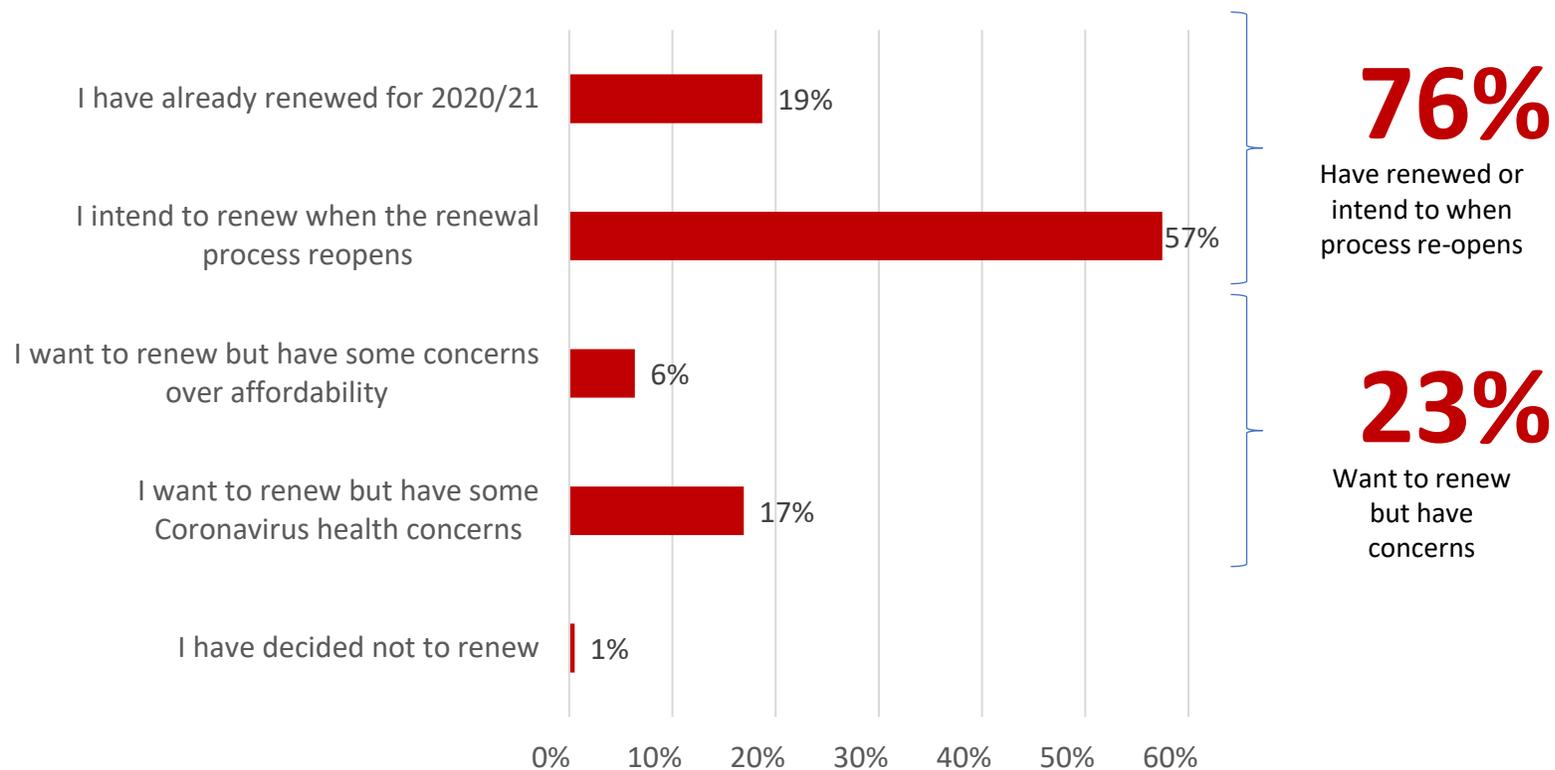
Q3: Overall, how would you rate Manchester United's treatment of supporters during the COVID-19 crisis?



Base: All Supporters 2931

1 in 5 season ticket holders have already renewed, with almost a quarter having health or affordability concerns

Q6 - Thinking about renewing your season ticket, which of the following statements most closely applies?

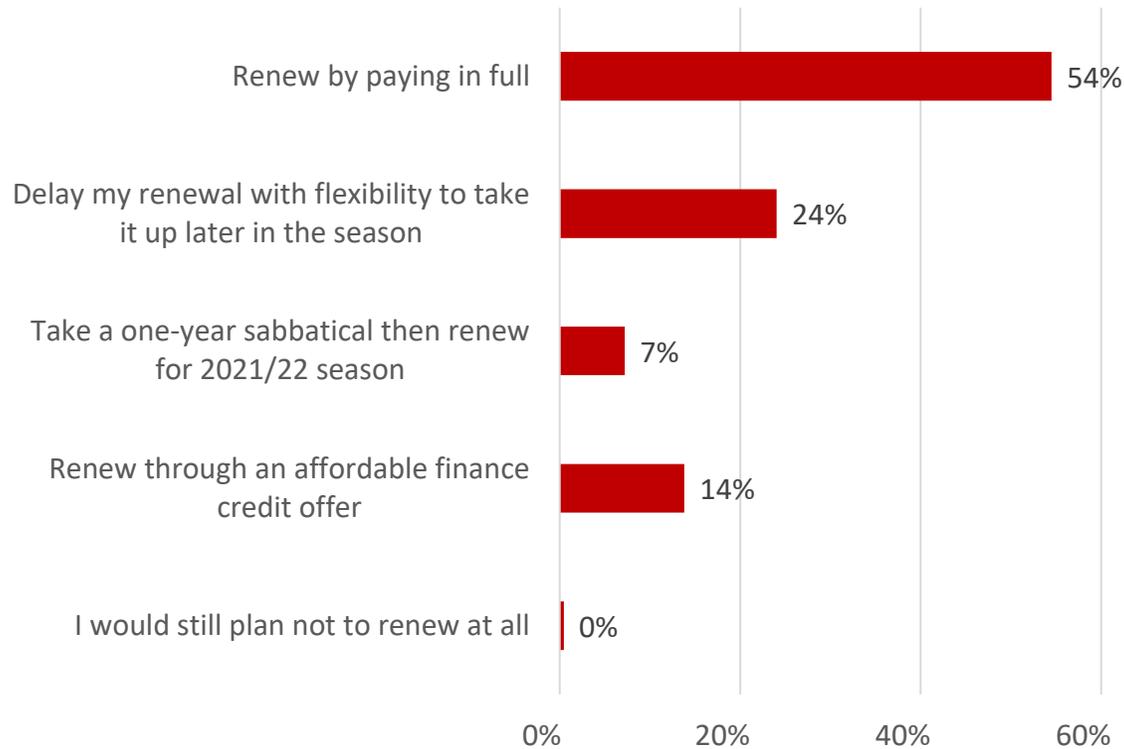


- As age increases so does the proportion of supporters that have health or affordability concerns:
 - Under 21 9% (Low Base 23)
 - 21 to 40 21%
 - 41 to 64 23%
 - 65 and over 30%
- Interestingly just 14% of those who have been impacted financially by the COVID-19 crisis have affordability concerns around renewal

Base: All Season Ticket Holders (1914)

Over half of those who have not yet renewed plan to do so by paying in full, clearly different approaches are preferred amongst those who have specific concerns

Q7 - Thinking about next season, if offered, which of the following options would you most likely take?



Renewal method	No Concerns	Affordability Concerns	Health Concerns
Pay in full	68% ↑	16% ↓	23% ↓
Delay renewal with flexibility to take later in the season	16% ↓	31%	48% ↑
Take a one-year sabbatical	2% ↓	13% ↑	20% ↑
Renew through an affordable credit offer	13%	40% ↑	8% ↓
Still not renew	0% ↓	0%	0%
Base	1100	122	324

- Of those who have been impacted financially by the crisis, they are twice as likely to renew through affordable finance (21% vs. 10%).
 - 25% wish to take up a flexible option
 - 8% wished to take a season sabbatical
- The credit option is most preferred amongst those aged 21 to 40 (25%)
- The flexible option is most preferred amongst those aged 65 and over (30%)

Base: Season Ticket Holders who are yet to renew (1556)

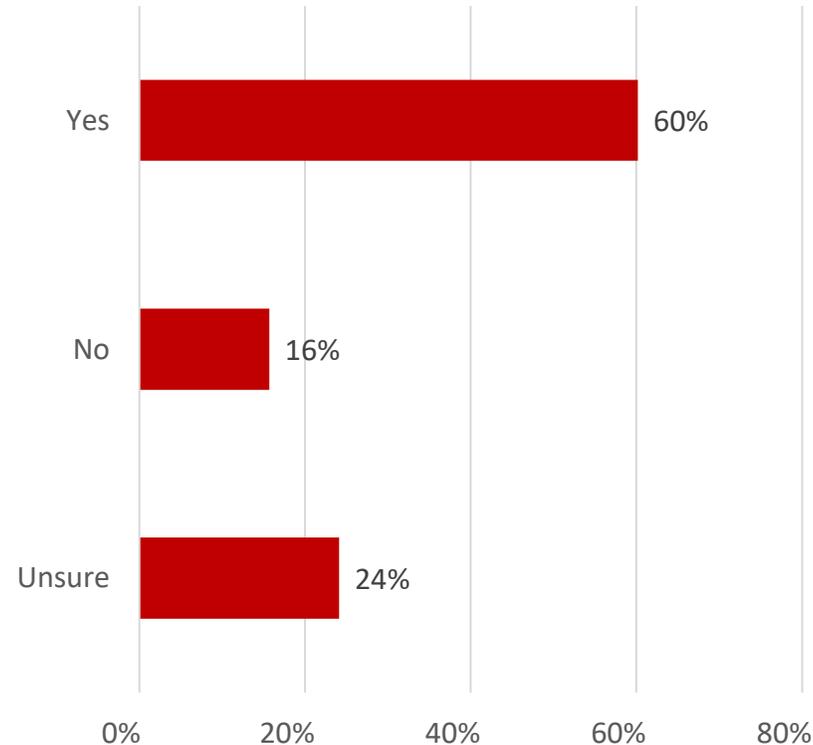
The majority of supporters agree with a phased return of supporters to stadia. Those who wish to attend, tend to be younger and less likely to have health concerns

Q10 - If a phased return of supporters was introduced, with a reduced capacity and social distancing measures put in place, would you want to attend?

Q9 - 'Phased' return of supporters

58%
Agree

- Interestingly, members (66%) are more likely to agree than season ticket holders (54%)

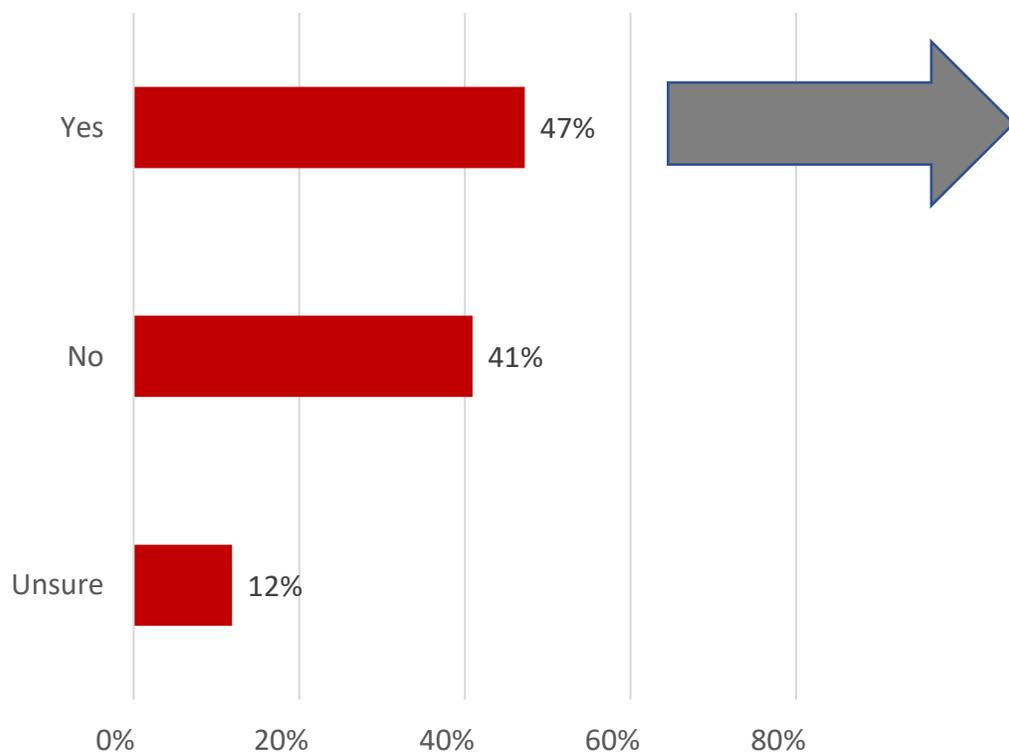


- Just a third (34%) of those with health concerns would want to participate in a phased return vs. around three quarters of those who have already renewed or intend to do so
- Age is a key predictor
 - Under 21 79%
 - 21 to 40 66%
 - 41 to 64 60%
 - 65 and over 51%

Base: All Supporters 2931

Match going fans are less likely to be supportive of football returning behind close doors.

Q11 - Given the current circumstances are you supportive of football returning behind closed doors to complete this season 2019/20?



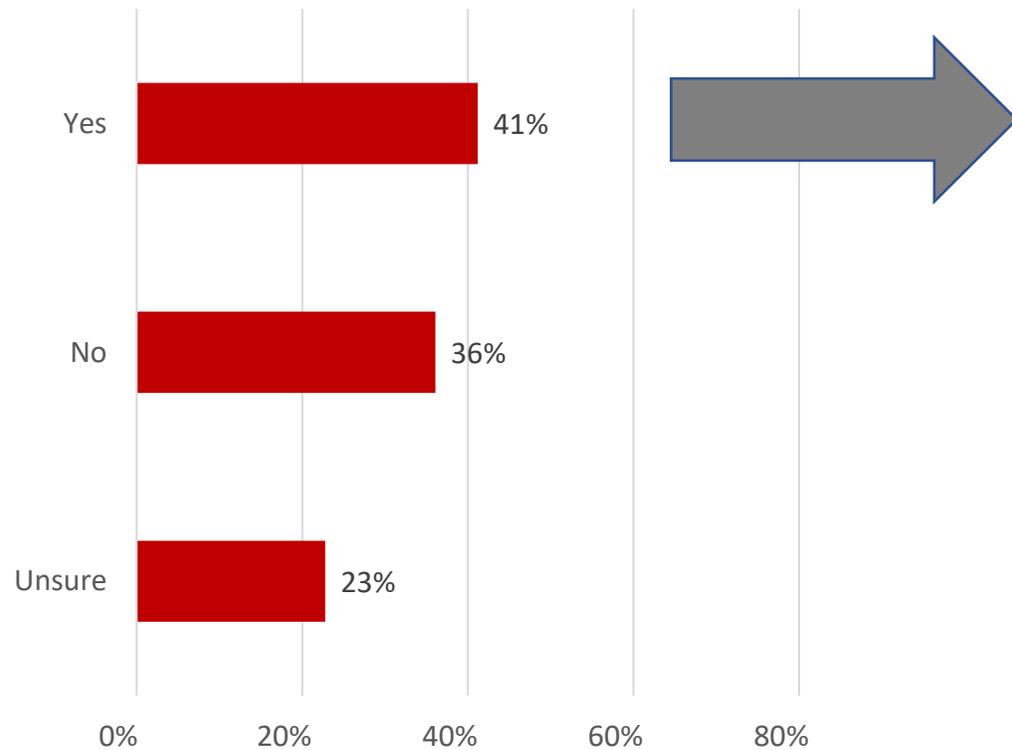
Supporter Type	% Yes
Season Ticket Holder	43%
Member who attends	49%
Member who doesn't attend	63%

- Those who perceived the club's treatment of supporters not to have been Excellent/Very Good during the crisis are also far less likely to be supportive of football returning behind closed doors
- Those under 21 (62%) and those 65 and over are most supportive of games being played behind closed doors (58%)

Base: All Supporters 2931

Support declines for starting next season behind closed doors. Potentially, could this be mitigated by not seeking season ticket renewals until a phased return is confirmed

Q12 - Would you be supportive of a closed door start to the 2020/21 season?



Renewal Status	% Yes
Renewed/Intend to pay in full/Take credit option	38%
Wish to take sabbatical	57%
Flexible Arrangement	49%

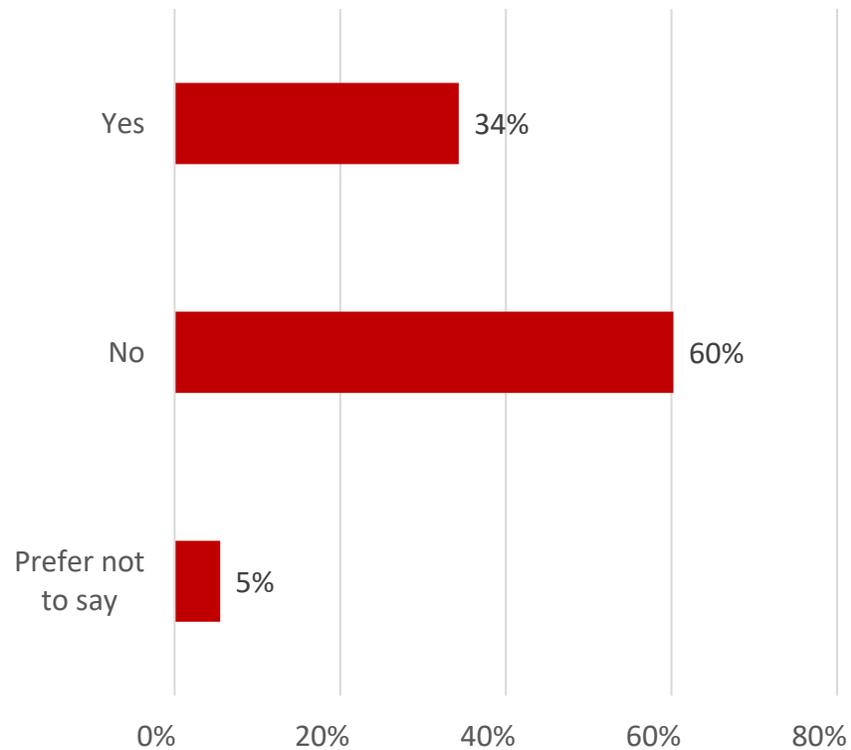
Base: All Supporters 2931

NB: No differences by supporter type (i.e. STH, Member)

Respondent Profile

COVID-19 have impacted over a third of supporters financially

Q18 - Have your finances have been negatively impacted by the COVID-19 pandemic (i.e. Furlough, Salary cut, Redundancy etc.)?



75%

Of those who have concerns around affordability have been negatively impacted by COVID-19

53%

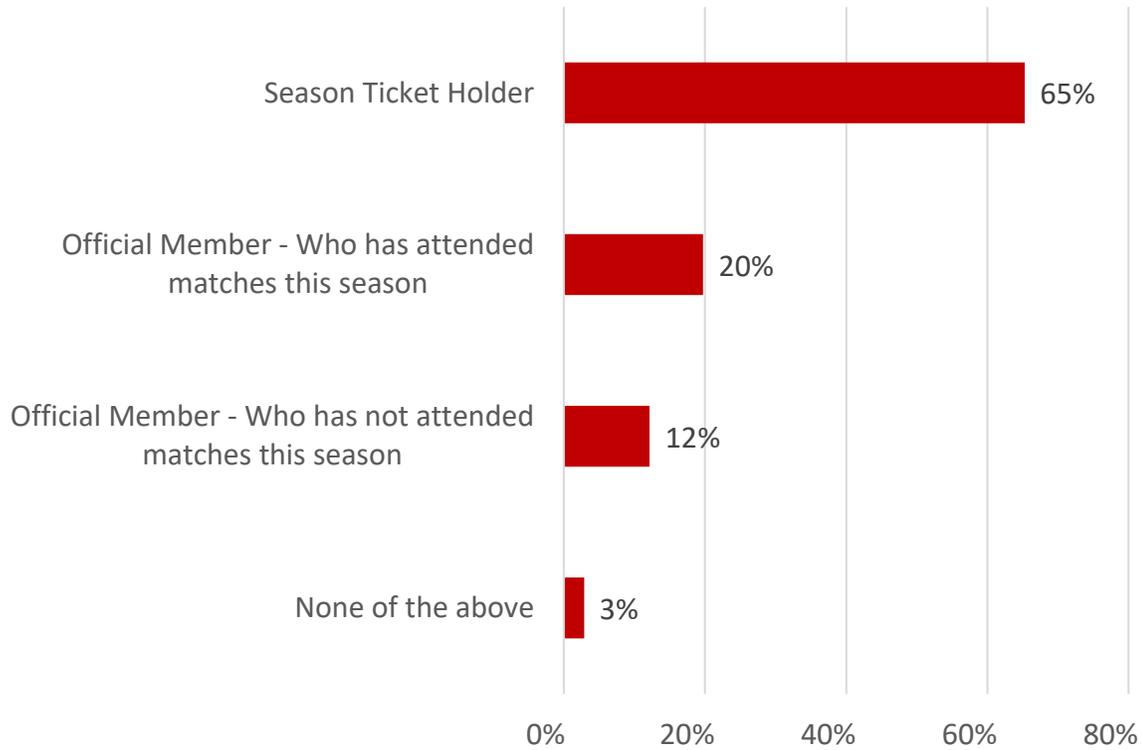
Of those who intend to renew via affordable credit have been negatively impacted by COVID-19

Base: All Supporters 2913

NB: No differences by supporter type (i.e. STH, Member)

Respondent Profile

Q5: Which of the following are you?



Q16: Gender

Male 90%
Female 10%

Q17: Age

Under 21 1%
21 to 40 26%
41 to 64 53%
65+ 18%