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From “carefree casuals” to “professional wanderers” Segmentation possibilities for football supporters

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Abstract Academically constructed segments may often fail to be implemented by practitioners. There may be a number of reasons for this, but at the heart of the matter for practitioners must be an economic reward that outweighs the incremental costs of segmenting. Central to this issue is the ease with which different types of data can be collected and used. Experience from direct marketing practice suggests that segments based on customer value and customer benefits sought often lead to successful strategies. Accordingly, looks to utilise these variables to complement the traditional use of geo-demographic and psychographic approaches. Examines the business of football. Using a mixed qualitative and survey based approach, an exploration of football supporters was undertaken with the objective of identifying segmentation opportunities. A number of new segments were identified, among them “professional wanderers”; “carefree casuals” and “repertoire fans”. Suggests directions for broader studies. Hopes that this work will better inform the marketing efforts of professional sports franchises and indeed all leisure sectors that rely on regular live audiences for their livelihood.

Introduction

Segmentation has been described as:

The subdividing of a market into distinct subsets of customers, where any subset may be selected as a target market to be reached with a distinct marketing mix (Kotler, 1980).

Segmentation’s most widely reported benefit is that it leads to a better understanding of customer needs and characteristics, allowing more accurate marketing approaches to be made (Frank *et al.*, 1972). However, Dibb and Simkin (1997) found that true market segmentation is very rarely applied. Segmentation usually requires a concerted effort in gathering data over time, identifying appropriate segments, then allocating customers to each segment. This, of course, is only the start. Separate marketing strategies need to be created and implemented, with all the commensurate upheaval that entails. To counter this, Dibb and Simkin (1997) developed a process for segmentation based on a simple cycle of analysis, strategy development and marketing program design. They described “analysis” as the identification of appropriate segments and this is the intention of this paper. The question of what is “appropriate” will be developed as the paper progresses, but one early direction can be provided by the direct marketing community, who appear to have had



some success by emphasising customer value and benefits sought as of primary importance.

While the academic focus of this paper is segmentation, the context is the business of football. Reflecting its growing importance as a substantial sector of commerce, there is an increasing body of literature that discusses marketing strategies for sports clubs (e.g. Mullin *et al.*, 2000; Parker and Stuart, 1997; Szymanski, 1998). This literature emphasises the need to reflect the uniqueness of the sports spectator, and the implication is that consumers in this sector should be treated as different to those of arguably more “mainstream” areas of commerce. The focus here is the segmentation of football supporters and the literature provides clues that “traditional” variables – age, sex, income and so on – may need to be supplemented with sector specific variables which reflect the nature of sport. It is hoped that this paper can contribute to the academic debate about the merits of, on the one hand, a single, unifying approach, and on the other hand, a sector-specific approach, to segmentation.

The intention here then is to construct a series of segmentation options for the business of football, taking the academic and practitioner concerns raised so far into account.

Segmentation approaches

There are a number of familiar approaches open to marketers who wish to segment. These were grouped by Jobber (1995) under behavioural and profile based techniques, which need to be examined in a little more detail in order to set this paper in context.

A number of authors, including Stone (1996), Shaw and Stone (1990), Dupin (1992), Patron (1994) and Peppers and Rogers (1993) have identified different segmentation strategies for behavioural data. In the context of this study, such data could be used for segmenting by product need (what supporters want from the football product), or segmenting by value (how much supporters are worth to the club). Another behavioural approach for us to consider is to segment according to the different levels and types of loyalty that supporters exhibit. This debate was highlighted by Piercy (1997), who questioned whether all customers wanted long term relationships, and also differentiated between close and distant types of relationship.

Profiles are often aggregates of psychographic and geodemographic variables. Psychographic approaches involve the segmentation of people according to their activities, interests and opinions (AIO) (Wells and Tigert, 1977). These have been applied by direct marketers via the collection of so called lifestyle data (Reynolds, 1993), but more for the use of profile data, often in conjunction with geodemographic data (see Sleight, 1993; Fairlie, 1992). Geodemographic data describes extrinsic facts about customers such as their income, age, household status, house type and so on. In order to choose which variables were likely to be important, the authors decided on a closer examination of the sports literature, which would provide a platform for the exploratory phase.

In the sport context, while previous studies (e.g. Mullin *et al.*, 2000; Parker and Stuart, 1997) have usually attempted to analyse supporters with a number of variables, none have begun from as broad a perspective as the one attempted here. Thus this research examines a number of variables in the context of supporters' attitudes, their views on loyalty, and the behaviour both in terms of purchase frequency and process of consumption.

The paper begins with a short review of the existing literature on the business of football and the segmentation of sports supporters. It then draws upon both qualitative and quantitative research gathered as part of an ongoing partnership with a football club in the English Premier League to provide an in-depth analysis of possible segmentations. The analysis goes beyond existing frameworks to provide a number of alternative segmentations specific to football supporters, before concluding with a tentative new model of supporter types for clubs to consider.

The business of football

With the emergence of football as "big business", the segmentation debate has assumed much greater importance from a practitioner perspective. To begin with, the revenues obtained from supporters are impressive. At the top end Manchester United reported their annual turnover at over £100m in 1999 (Deloitte and Touche, 1999), while typical Premier League clubs are effectively medium sized businesses with turnovers averaging £20-30m, enough to sustain separate marketing departments staffed with professional marketers (Deloitte and Touche, 1999). (A similar picture is revealed internationally, indeed, in 1997 (Sugden *et al.*, 1998), Jaou Havelange, the FIFA president, estimated football's annual global turnover to be \$250bn, an astonishing figure.) Second, with the increased interest that football clubs are taking in direct marketing, each club is building substantial databases (Tapp and Clowes, 1999) which will enable them to segment supporters much more easily. Third, there is evidence building (Tapp and Clowes, 1999) that supporters will be responsive to a segmented approach.

Academically, however, there is a lack of substantial work which profiles and segments fans. Segmentation allows new opportunities to be identified from under-served customer groups and there is little doubt football fans fit this description. This then is the focus of this research: who are modern football supporters? What typical profiles do they fit, and how could they be segmented, if at all?

Segmentation in sport – traditional approaches

As a sector, sport exhibits a number of unique characteristics. Mullin *et al.* (2000) point out that:

- Partly due to sport's salience and also strong personal identification, sports consumers have remarkably high involvement with the product. As Taylor (1998) put it recently: "football is more than just a business. No one has their ashes scattered down the aisle at Tesco".

- Consumer demand tends to fluctuate widely.
- Sport is an example of a highly intangible and personalised service in the sense that each participant/spectator takes a unique set of benefits.
- Sport is generally publicly consumed and customer satisfaction is related to social facilitation.
- The sport product is inconsistent and unpredictable.
- The sport marketer has little or no control over the core product.
- Sport has almost universal demographic appeal worldwide.

These characteristics have led to specialist segmentation approaches unique to professional sports support. Mullin *et al.* (2000) emphasised the importance of value based segmentation in which supporters are grouped according to their attendance commitment.

Mullin *et al.* (2000) also emphasised the importance of approaches such as lifestyle, social class and other profile data driven segmentations in driving sports supporters' behaviour. More recently, Parker and Stuart (1997) discussed the remarkably high loyalty of football fans compared to customer loyalty in other sectors. They did, not however, discuss possible segmentations of fans according to their levels of loyalty. Another variable important to sport was discussed by Quick and Van Leuwen (1998), that being supporters' attitudes to winning. The complex linkages between supporters' motives (for example winning, entertainment or self-image) and their loyalty and behaviour will be subject to further exploration in this paper.

Market segmentation and the football industry

Armchair fans of football are entranced by TV footage of games from the past, black and white pictures of a game played by men in baggy shorts and old fashioned haircuts. Viewers who allow their eyes to be distracted by the shots of the terraces may smile at the uniformity of thousands of cap wearing men swaying forwards and back. There seems to be quite a contrast to the present day. In those days, in fact from 1863 when the world's first football association was formed in London, right through to the late 1980s, football was enjoyed largely by a "skilled working and lower middle class" male audience (Russell, 1997). This gave rise to the description of football as the "working man's ballet" (Tomas, 1996).

The Hillsborough disaster of April 1989 and the Taylor Report which followed it have forced profound changes on British football (Dempsey and Reilly, 1998). The introduction of all seat stadia has coincided with a massive influx of money from satellite TV and an increase in the popularity of sport generally in society. While there is little direct evidence, popular commentators (Dempsey and Reilly, 1998) assert that traditional support for football has evolved into a more heterogeneous audience, with sections of society ranging from corporate business people through middle class families to mother and daughter groups, alongside the traditional male groups. A glance at the Carling

Premier League survey (Sir Norman Chester Centre for Football Research, 1998 (see Table I) will confirm that the fan base is demographically complex, certainly more so than was the case prior to 1989 (see Russell, 1997). While the profile of supporters has undoubtedly changed, the attitudes of the "new fan" are less well understood, and there are conflicting views. For instance, Irving Scholar, ex-chairman of Tottenham Hotspur (Tomas, 1996):

I have problems with the view that football has gone upmarket. Do the people who say that mean that football has suddenly found a whole new audience of people who previously hadn't been to a game in their lives? There might be some cases of this, some youngsters who took their fathers to a match and dad suddenly thought – I like this. But generally, the new audiences are people who wanted to go to matches but were put off by the poor facilities and crowd violence (Irving Scholar, former chairman, Tottenham Hotspur FC).

Tomas (1996) quotes Halstead as an example of another view of football supporters:

With football having attracted middle income groups, the market for the game is now much more sophisticated and variable. Many of these people don't have the same emotional links with football as the traditional hard core supporters. They go to football to have a good day out, but they could just as easily switch to something else (Richard Halstead, Editor, *Business Age*).

These anecdotes provide some colour but in fact there is still relatively little data available to help our understanding of sports consumers. Wann and Hamlet (1995) found that only 4 per cent of research into sport focused on the spectator. In particular:

Little empirical research has been directed toward individual differences among sports spectators in terms of their level of commitment or identification with a particular team (Wann and Branscombe, 1993).

	Leicester University study		
	Our club	National	Our sample
<i>Age</i>			
Under 30	40	32	44
31-50	49	52	48
50 +	11	16	8
Per cent male	88	87	80
Married/live with partner	58	65	54
Have school age children	33	33	39
Ever go to university/poly	31	34	nk
<i>Income</i>			
< 10,000	1	10	10
10,001-15,000	24	22	14
15,001-20,000	28	23	14
21,001-25,000	16	15	15
25,001-30,000	9	11	17
30,001 +	12	19	30

Table I.
Demographics of
football supporters:
our sample vs
Leicester University
study of 1998

Source: Sir Norman Chester Centre for Football Research (1998)

This is important because as Mann and Pearce (1978) noted:

Sports spectators bring to a game a set of motives that have an effect on their cognitive, affective and behavioural dispositions.

Methodology

The authors were not satisfied that the existing literature gave sufficient understanding of supporters. It was therefore decided to undertake a two-stage research strategy with an exploratory qualitative phase followed by a quantitative survey to help investigate associations between variables. Both stages were conducted with the full collaboration of the football club, who allowed the authors access to club facilities for the in-depth interviews.

The exploratory qualitative phase was based on a checklist of topics rather than a formal list of questions. The checklist was designed to enable the interviewer to develop levels of both pre-understanding and understanding (Gummerrsson, 1991). A number of factors contributed towards the selection of a qualitative approach to supplement the survey data. It was considered important for the internal validity of the work that respondents' answers be understood within the context of their personal construct. It was felt that a high degree of trust and understanding needed to be present between researcher and respondent in order to overcome a reluctance to discuss sensitive topics such as supporter loyalty.

Guba and Lincoln (1994) argue the case for the shift from positivism to constructivism in cases like this. At an ontological level, each supporter represents an individual reality constructed with a variety of relativist attitudes and motives. At an epistemological level, too, the constructivist approach can be justified. Preliminary interviews revealed a distinct divergence of perspectives on personal motives and beliefs, which would be very difficult to assess using objective methodologies.

A semi-structured approach to questions was used, with the researchers employing a topic guide that allowed deviation into new areas as appropriate. Questions employed centred around the key areas of:

- where football fitted into the respondent's life;
- degree of commitment and identification of motives;
- linked factors such as community, family and social needs;
- supporter loyalty, needs and match day behaviour; and
- bonding with the club versus bonding with football as a whole.

Accordingly, some 25 in-depth interviews were carried out with supporters. These were held at the premises of an English Premier League club, between February and April 1998. Each interview lasted approximately one-and-a-half hours. In order to ensure a measure of standardisation of interviewing and interpretation, each interview was recorded and then analysed by both authors separately, before agreeing on a joint interpretation and understanding. NUDIST software was employed for some early interviews, but was found not

to significantly add to the personal interpretations of the authors. This joint approach enhanced the consistency-coherence and the communicability of the research (Rubin and Rubin, 1995). Finally, the conclusions were subjected to further debate and validation in a meeting with colleagues within the sports research unit at our university.

Respondents were recruited from a variety of sources to ensure a range of different views would be explored. These sources consisted of lists supplied by the club, and also supporters recruited from the ticket office or retail premises. The major sampling issue was felt to be the level of commitment to the club. Hence we interviewed a range of supporters from season ticket holders to "casual" supporters. These were recruited from a list of supporters who bought tickets using the phone and credit cards. The final group were supporters who bought tickets in person from the ticket office, usually paying cash. These were more likely to be representatives of social classes C₂, D and E groups, which were under-represented in the above groups.

Respondents were offered the incentive of a free match ticket to encourage attendance to interviews. The refusal rate for interviews was exceptionally low at less than 5 per cent (only one person did not wish to be interviewed) leading us to conclude that non response bias was not an issue in this research.

The findings from the qualitative work completed the exploratory phase. The subsequent quantitative phase built on this hermeneutic approach. A number of different mindsets were identified according to supporters' strength of feelings towards both football generally, and also the club they support. It was found that supporters who differed significantly along these dimensions exhibited very different personal constructs. This understanding allowed us to design the questionnaire appropriately. Mixing of qualitative and quantitative approaches in this manner was advocated by Neuman (1997), who asserted that positivist research should proceed only after interpretive research has understood the subjects' systems of meaning. Easterby-Smith *et al.* (1991) also noted the technique of bridging between positivism and phenomenology.

The quantitative survey was carried out on 28 November 1998 at the club ground just before a Premier League match. A total of 667 supporters filled out a questionnaire. The data were gathered by 27 postgraduate students studying for the Masters degree in Marketing. Quotas were set based on the clubs' own database records and from the Leicester University survey (Sir Norman Chester Centre for Football Research, 1998 (see Table I) which gathered details of all Premier League season ticket holders, including those of our club.

The research sample was subsequently validated against these records. The Leicester University data and the club's own records were representative of season ticket holders only, but comparison between the Leicester University sample and this research nevertheless revealed a similar demographic profile. Validation was also conducted against two further surveys of supporters of this club, completed by the authors in June 1999 and November 1999. While these have focused on objectives separate to this paper, personal data and some

attitudinal data comparisons could be made, and again similar patterns were uncovered in the data.

Based on the exploratory work, questions focused on the following elements: personal profile data, affective and conative attitudes to loyalty; affective attitudes to football as entertainment; the decision-making process of attending and how this may be influenced; and conative attitudes towards non-match-day activities. Likert scales or simple multichotomous choice designs were used for the responses. Open questions were not used because the exploratory phase enabled a high degree of precision with question and response choice.

The data were subsequently analysed using Pinpoint and SPSS software. Chi square analysis was used to test for significance between groups. All of the data presented were found to be significant for this test at $p < 0.05$. The Cronbach alpha test of reliability was employed for each major segment, and is reported and commented upon in the next section of the paper.

Results and discussion

The important variables were identified by the literature review earlier as geodemographics, psychographics, loyalty, supporter usage levels (value) and supporter needs. Each of these is addressed separately, before concluding with a segment framework which links supporters into one picture.

Geodemographic variables

The survey revealed a broad profile, implying a mix of different types of people. While men still dominate the gender mix, women made up nearly 20 per cent of support. There was a range of occupations, highlighting a broad social class mix, with a slight C1C2 bias, which has historical roots. The sample reflected the changes of 1990s “new football”: finding 30 per cent managers/professionals, while 30 per cent of supporters said their household income was >£30,000 p.a. and only 8 per cent said they earned less than £10,000 p.a. The interviews revealed three variables of particular importance for segmentation: lifestage, gender and proximity of residence to the club. The age profile was found to be very wide, with support starting at about five years of age and often lasting a lifetime. The concept of lifestage was felt likely to be of more interest, as Mullin (2000) highlighted lifestage as an important explainer of sports attendance. Supporters confirmed this with their stories of how they had drifted in and out of regular attendance at their club. Of particular interest were the “admissions” by heavy attendees of variations in their attendance in the past. They explained that reasons for non-attendance included family/work commitments, lack of income, and they had simply lost interest, often in their late teens and early 20s. It was concluded that different lifestages created both barriers to attendance (for example socialising or having a young family) and also triggers (for instance, a son or daughter influences parents to attend).

One clear winner of the decline of hooliganism has been women, with their representation increasing from 10 per cent (Malcolm *et al.*, 1992) to 20 per cent in this study. The women saw social barriers as being rapidly eroded, with “all

women” groups now more common, and daughter/mother units now alongside the traditional father/son dynamic. Culturally, it was very much the norm for women to attend football matches. That said, security issues were still raised – many women preferred to attend only with male friends or family, and some said they would never attend without a male consort. One respondent had discussed coming to the match with her girl friends but she felt intimidated:

Women are more accepted now . . . but I wouldn’t feel comfortable to go with a group of my girlfriends . . . (Woman, professional, 30s).

The interviews suggested that women did not want to be treated differently to men; but they did want security:

Maybe if it had . . . I wouldn’t want segregation or anything . . . but if it felt a bit more friendly towards women then maybe we could go along (Woman, clerical, 20s).

Women with more traditional views felt that it was “not the done thing” for women to stand, shout and sing in a big crowd by some, but most expressed an opposite view. In general, women seemed to enjoy the singing and tribalism as much as men, but did not relish feeling in danger. They were firmly against any segregation in the ground, however. In summary, women did not want different treatment to men, but for them safety was a key issue.

Another key variable was found to be location, or geography. The rise of football owes much to its social and cultural roots in working class geographical areas (Russell, 1997). For example, the high interest in football pre 1900 in the north west of England can be attributed to the advent of Saturday as a holiday for workers in the textile industry in the 1890s, something not available to workers in the rest of the country. However, even allowing for this culture, the researchers were unprepared for the extent to which local pride played a part in supporter psychology. Fans (particularly the more committed) saw the club as the main source of local expression of the city. In addition to the locals who had been brought up in the area the research also identified a new segment, which could be termed as “professional wanderers”. This group were made up from people (mainly managers/professionals) who have held jobs in a number of different places who tended to strike up (weakly held) allegiances with local teams, which they retain when they next move. Perhaps because of this they tended to be “casual” rather than “regular” fans. They did not feel the same community ties as local people and would usually readily admit to being less loyal.

Psychographic variables

When marketing to supporters, the dichotomy between the quality of entertainment of the product and the success of the team has proved a fertile area of academic debate (Burca *et al.*, 1995). Quick and Van Leuwen (1998) suggested there are examples in tennis, golf and soccer where the motive for sport consumption is not related to winning. This is also clearly true of English football fans. The very large crowds at Manchester City while in lower

divisions is a very salient example of supporter loyalty with a losing team (the team had been relegated twice in the late 1990s).

Sutton *et al.* (1997) found that people associate themselves with winning sports teams to enhance their prestige in others eyes and even to increase their own self esteem. Other “customer benefits” have also been investigated. For example, Burca *et al.* (1995) emphasised the importance of tribalism in hard core supporters, and this research revealed this as much more prevalent in fanatics than fans who only attend on a casual basis. Research carried out on Australian Rules Football supporters attempted to segment the crowd based on a combination of psychographics and benefits sought.

Stewart and Smith’s (Quick and Van Leuwen, 1998) typology developed after studying Australian Rules Football supporters are:

- *Aficianado* – the fan who seeks quality performance – game not team loyal.
- *Theatre goer* – seeks entertainment and wants a close contest.
- *Passionate partisan* – wants his team to win and identifies with team success and losses.
- *Champ follower* – brand switcher based on winning.
- *Reclusive partisan* – fan identifies strongly with team, but does not often attend.

These groups had much in common with the psychographic segmentations found in this study, with 55 per cent of supporters preferring an entertaining game, even if the team lost, and 39 per cent seeing winning as more important. Linked to this notion of winning versus entertainment was a split between those who identified themselves as “football” fans rather than “club” fans. “Football” fans identified with the skill of the players, admired the level of skill on display, seeing themselves as knowledgeable about the game. In contrast, “club” fans linked their self-image to the club’s fortunes. The in-depth interviews highlighted the commitment of the club affiliated fan: they took the risk of tying themselves to the club, win or lose, whereas “football” fans linked themselves to the skill levels on display. Asked what they would do if their club ceased to exist, the “club fans” insisted they would stop watching live football. They were not interested in transferring their allegiance to another club. As well as winning/entertainment, Stewart and Smith’s typology highlights a different issue, that of loyalty.

The loyalty issue

Football fans have much higher levels of involvement with their sport than customers have with mainstream products (Parker and Stuart, 1997; Tapp and Clowes, 1999). This partly explains the importance of attitudinal loyalty amongst football fans compared to mainstream business. After all, customers do not usually walk onto a British Airways flight chanting “loyal customers”! This study examined the more complex relationship between attitudinal and

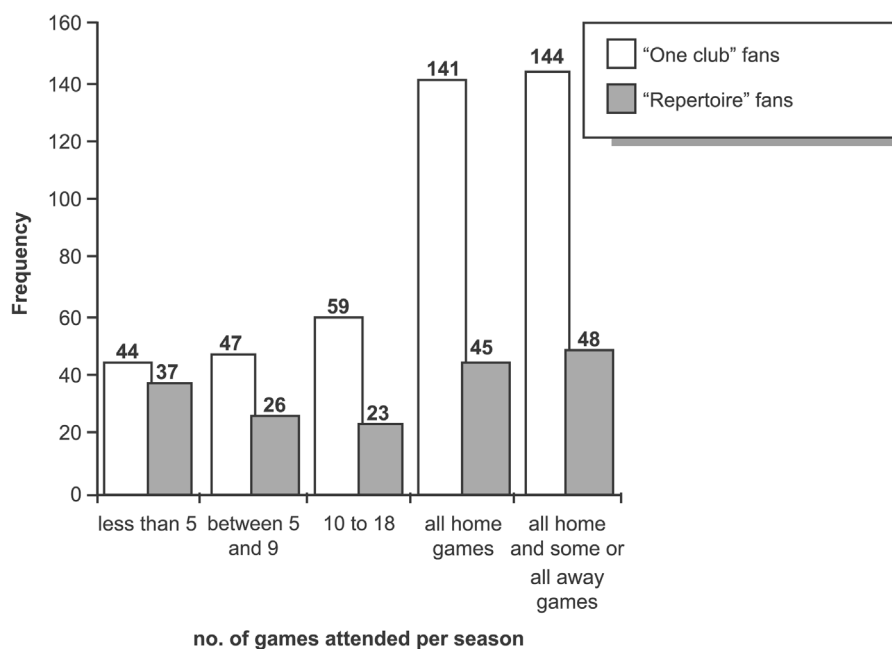
behavioural loyalty. There are many ways of defining behavioural loyalty in sports supporters: the percentage of total games attended per season; the propensity to renew support in successive seasons; and the extent to which supporters stick to only one team. The conventional wisdom within football (for example Fynn and Davidson, 1996; Parker and Stuart, 1997) is that supporters are blindly loyal. However, any analysis of supporter attendance figures quickly reveals layers of complexity. Russell (1997) scanned crowd size data back to the inter war period and found that in general, most sides see support rising and falling in more or less direct correlation to their success on the field. Exceptions to this include Newcastle United, Sunderland and more recently Manchester City. Data based on crowd totals are likely to be a misleading indicator of individual loyalties, but we can deduce that a significant sector of supporters are not sticking with their teams through thick and thin.

Whether these more fickle fans move onto other teams or cease being active supporters altogether is another important question. The qualitative interviews confirmed the “pariah” status accorded to those who switch teams, and not surprisingly no-one owned up to this behaviour, although both Kahle *et al.* (1996) and Stewart and Smith (1997) did uncover “champ followers” in their work in other sports. If this serial brand switching appeared rare, multiple brand usage was surprisingly common. After uncovering this increasingly often in our interviews it was tested in the quantitative phase, finding 27 per cent of the sample said that they regularly watched matches not involving “their” team. Other matches that they attended involved premier league, football league and local non league teams. The researchers described this new segment as “repertoire fans”.

Figure 1 indicates that those supporters who only occasionally attend at their club were more likely than committed supporters to be repertoire fans (in percentage but not in absolute terms). An interesting contradiction between attitudinal and behavioural loyalty emerged when an attitudinal loyalty measure was cross tabulated with repertoire support (Figure 2).

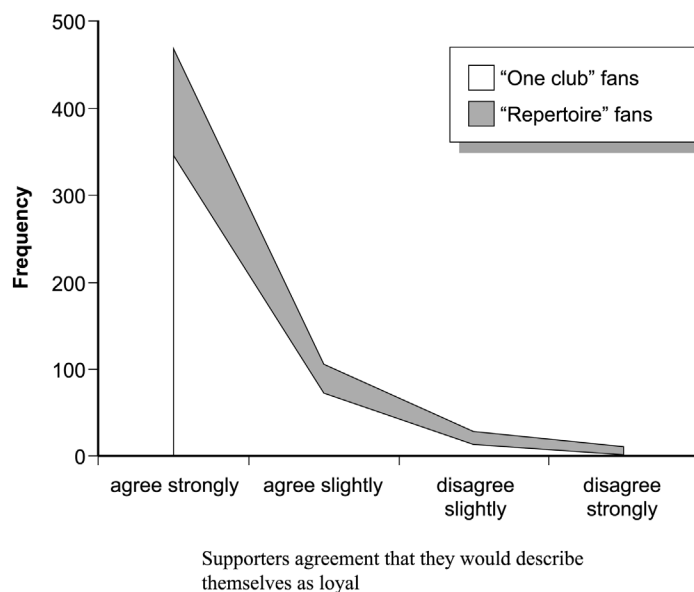
Figure 2 highlights a trend towards repertoire fans being less likely to describe themselves as loyal than all fans. However, arguably more important is the finding that most repertoire fans still see themselves as loyal supporters. In their minds there is no contradiction between loyalty and watching other teams. For these fans, loyalty is seen as a support issue (an attitude) rather than an attendance issue (behaviour). The research also found repertoire fans to be younger, with higher incomes, and more likely to have business/professional jobs than manual/factory working occupations. However, as Figure 3 shows, repertoire fans were only slightly more likely to favour “entertainment” over “winning”, contrary to what the researchers had predicted.

A Cronbach alpha reliability test of the key dimensions (they attend games not involving the club; their agreement that they are loyal supporters; their total attendance in the season) of repertoire supporters was calculated at 0.77,



Note: Chi square $p < 0.01$

Figure 1.
How repertoire fans vary versus overall attendance



Note: Chi square $p < 0.01$

Figure 2.
How repertoire fans may still describe themselves as loyal

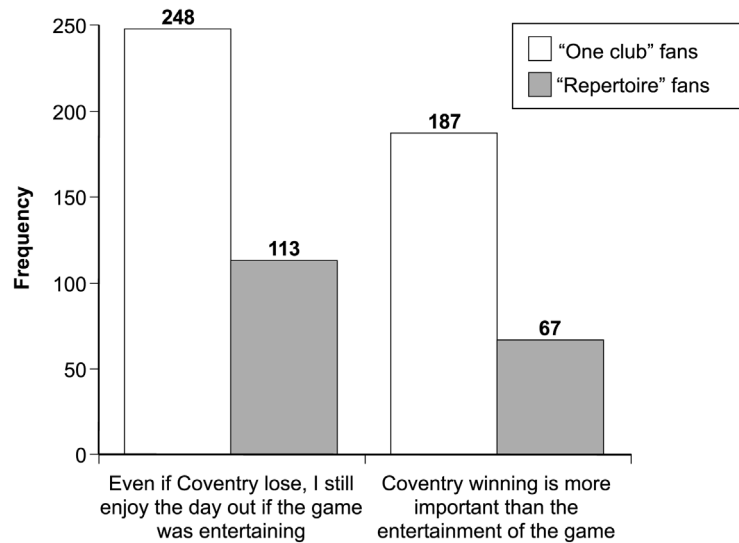


Figure 3.
Repertoire fans'
attitudes to winning
versus entertainment

Note: Chi square $p < 0.01$

indicating good internal consistency. The next segmentation dimension investigated was supporter's value to the club.

Segmenting according to supporter value to the club

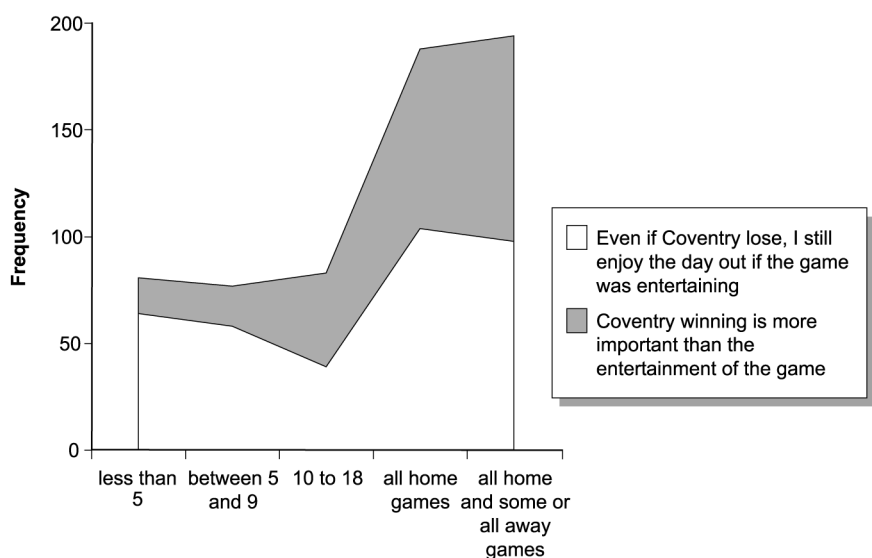
Mullin (2000) highlighted the utility of segmenting supporters according to their value to the sports organisation. For example, occasional supporters could be targeted to provide more regular support, while high attendees may be targeted with "loyalty programmes". Discussions with managers at the club confirmed the researchers' feeling that supporter value (defined by the number of games attended) would be an important variable to explore. For the purposes of reporting the findings from this research, those supporters who went to between one and nine games per season are called "casual" fans. Those who went to between 10 to 18 games are dubbed "regulars", while those attending more than 18 home games plus some or all away games were classified as "fanatics". The qualitative and quantitative data found links between psychographic and behavioural variables, which enabled the profiling of "fanatics", "regulars" and "casuals" as discussed below.

Fanatics. By asking fans about their spending levels, it was possible to calculate an estimated average spend for each value segment. Fanatics spend an average of £350 per annum on tickets and about £75 per annum on merchandise, making them the most important group in terms of income to the club. The in-depth interviews revealed a spectrum of "fanatics" from those referred to as "football extremists" who had commitment to the sport and the club that is arguably unparalleled in other business or leisure sectors. Many of

these fans were collectors (Tapp *et al.*, 1999), others lived and breathed football, placing it at the top of the list of priorities in their lives, above even friends and family. The fanatics' need for a relationship with their club/football stretched beyond the match day experience with 66 per cent of fanatics saying they would attend supporter evenings compared to only 26 per cent of "casual fans" (those who attended an average of five games per season). Similar numbers of fanatics (63 per cent) showed more interest in receiving regular information about the club. Finally, in terms of benefits sought, fanatics were more likely than casual fans to be "winning" rather than "entertainment" oriented. Figure 4 highlights how more involved fans are more oriented towards "winning" than "entertainment".

The importance of loyalty has already been discussed, but deserves a closer look in a discussion about the most partisan supporters. By definition, fanatics are more behaviourally loyal than regulars or casuals, and the research found that this group also emphasised the importance of conspicuous loyalty. The act of being loyal – both regular attendance and being one-club fans – is crucial to the credibility of a tribal fanatic supporter. Figure 5 highlights the difference between fanatics and more casual fans with respect to their agreement that they were loyal supporters.

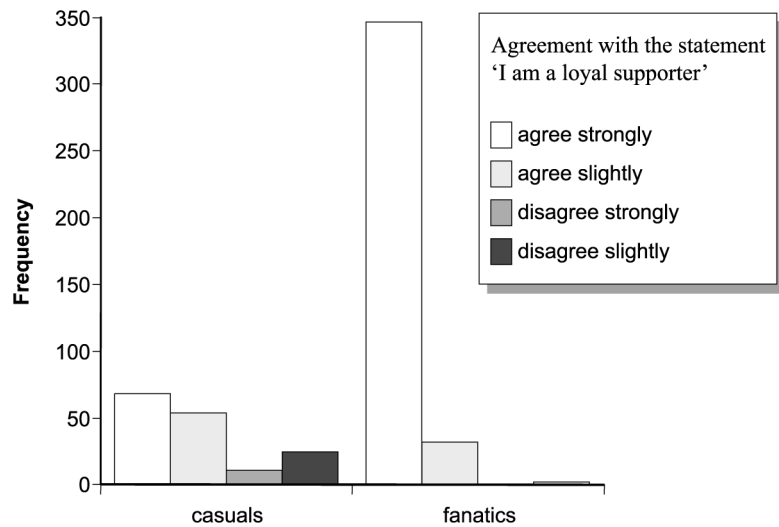
Similarly, while 46 per cent of "casuals" were "repertoire fans" attending games not involving the club being studied, this was true of (only) 25 per cent of "fanatics". A Cronbach alpha reliability test was calculated at -1.01 for three dimensions important to fanatics: number of games attended; likelihood of describing oneself as loyal; and interest in attendance at supporter events. This indicated high levels of internal consistency.



Note: Chi square $p < 0.01$

Figure 4.
How attitudes towards winning and entertainment vary by supporter value to the club

Figure 5.
Showing how “fanatics”
are more attitudinally
loyal than “casuals”



Note: Chi square $p < 0.05$

Regular supporters. “Regulars” attend an average of about 15 games a season, spending £300 per annum on tickets and about £35 per annum on merchandise.

The qualitative phase revealed that by most standards, these are committed supporters, but held something in reserve. Unlike the “fanatic” segment, football was not considered top priority in their lives. There seemed to be more of a sense of perspective to their support: while they shared the same highs and lows as fanatics, they did not match the depth of commitment of fanatics in linking their self image to the club. There was also some evidence in the qualitative phase that regulars were slightly more likely to be “glory hunters” – following winning teams. Quantitatively this was reinforced by the finding that this group had the highest percentage of fans (53 per cent compared to 23 per cent of casuals and 47 per cent fanatics; $p < 0.05$) who were more interested in “winning” than “entertainment”.

Casual supporters. Casuals attended an average of five games per year spending about £100 per annum, and also spending an average of £25 per annum on merchandise. The importance of local community spirit and links to club support for fanatics has already been noted, so it was thought that local geography could be important in understanding the casuals’ mentality. The research found that 67 per cent of casuals lived outside the city, compared to only 40 per cent of fanatics ($p > 0.05$). The depth interviews completed the picture: none of the casuals interviewed felt a close part of the local community, in contrast to the fanatics. Linked to this was that casuals were much more likely to be the “professional wanderers” group discussed earlier. One fan that lived in a neighbouring town summed up typical attitudes:

I have thought about going to see [another club] ... but this is the most convenient for me I suppose ... I can be in [town under study] in 20 minutes (Middle aged male casual).

Clearly this attitude would be anathema to dedicated fans.

The “casuals” (77 per cent) were more likely than fanatics (53 per cent) to prefer “entertainment” to “winning”, which was summed up by one interviewee.

I don't have any great love for any particular club any more . . . although you do tend to get involved in a particular game . . . you get to be an enthusiastic neutral for an hour and a half (Older male casual).

This seemed to sum up many casuals. They did like many of the same things about live football as regulars and fanatics, the atmosphere, the football skills, and they did get involved in the drama of it. It was not the case that casuals did not care:

While it's on I do tend to get involved. . . . If a goal's scored I'm up there with the rest of them jumping about, and I really don't mind which end it's scored in – you just get caught up in the whole atmosphere of the thing (Casual couple, professional, 35-45).

But afterwards they could just go home and forget it; if their team lost they did not feel the sense of depression and pain that regulars get. Instead of fighting for tickets, their response was “what else shall we do today”. Instead of depression when the team loses, the response was “oh well that was a good game”.

Figure 5 highlighted attendance versus attitudinal loyalty. One might expect that casual attendees would be less likely to see themselves as loyal, so the researchers were more intrigued by those casual attendees who nevertheless saw themselves as loyal supporters. This was investigated further by isolating these groups and cross tabulating against key variables.

This methodology uncovered two distinct groups, which the researchers have named “carefree casuals” and “committed casuals”:

(1) Carefree casuals (57 per cent of casuals):

- Defined as those casuals who only slightly agree, or disagree, with the notion that they are loyal supporters.
- 88 per cent of carefree casuals prefer to see an entertaining game, even if the club lose.
- 50 per cent carefree casuals attend matches not involving the club, compared to 29 per cent of all fans.
- 88 per cent describe watching football as just one of a number of choices for them on a Saturday.
- 63 per cent don't know when the club's next home game is.

In summary, “carefree casuals” may be football lovers, but see the club as an entertainment option, and being club supporters is not part of their self image.

(2) Committed casuals (43 per cent of casuals):

- Defined as those casuals who strongly agree that they are loyal to the club.

- Only 26 per cent attend matches not involving the club.
- 38 per cent think the club winning is more important than an entertaining game (close to the percentage of fanatics who think the same).
- 78 per cent of committed casuals know when the club's next game is.
- However, 75 per cent still see watching the club as one of a range of things they will consider.

In summary, "committed casuals" are genuine fans of the club, but for them some non-football activities are of equal or greater priority for them. Income was not an issue. They therefore value variety and choice, and perhaps have their football support in perspective with the rest of their lives.

Reflecting their differing levels of involvement with the product, "carefree casuals" and fanatics displayed different consumer behaviour characteristics. Casuals were much more likely to make last minute decisions to go to the game than fanatics. While over 93 per cent of regulars and 97 per cent of fanatics always knew what the club's next game was, the same was only true of 55 per cent of casuals. Indeed, 35 per cent of casuals said they often got to hear about games on the day itself, implying a group who saw football as one leisure option amongst many and made last minute decisions, which was also evidenced in the depth of interview.

Casuals were much more likely to make an active evaluation of alternatives; 82 per cent of casuals said watching the club was one of several alternatives they considered, while only 6 per cent of fanatics agreed with this. The fact that these casuals were receptive to timely marketing approaches was confirmed when 34 per cent said they would come to more games if contacted directly by the club a few days before. This compared to 5 per cent of fanatics and 20 per cent of regulars. Casuals preferred to buy tickets from a variety of sources like phone ordering with credit card, at an automatic dispenser, and at the ticket office. Most regulars and fanatics either had season tickets or bought face to face at the ticket office.

In the final section of this analysis the authors looked at match day behaviours to establish any segmentation possibilities according to product need.

Segmenting according to product need

In the qualitative phase the supporters were asked to describe their activities on the day of the match – before, during and after the game. Patterns of behaviour were found that revealed ingrained habits. These allowed the authors to propose six groups distinguished by their match day behaviour:

- (1) *Mine's a pint*. These are people who like a drink or two either side of the game. These fans will arrive early, "to park", will often meet casual acquaintances at the bar or maybe read the programme.

- (2) *Juggling the kids*. Families trying to fit in two or three events in the day. They may arrive at the ground at the last minute, but be high half time spenders on snacks and so on. Families are also high spenders on merchandise.
- (3) *Thermos at row D*. These are creatures of habit who get into the ground quite late, they were not interested in talking to anyone and may not spend much money at the ground on programmes or food.
- (4) *Season ticket friendlies*. These people enjoy the social event of meeting fellow supporters by virtue of always having the same seat.
- (5) *Loyal cash and chanters*. They buy tickets with cash when they get paid and have a good shout at the game. May be “regular” fans.
- (6) *Dads and sons*. These were quiet supporters, and not part of a group. They were loyal, “club” rather than “football” oriented, and critical of “disloyal” boys being Manchester United fans.

Further analysis of the segments is possible. Each segment can be modelled according to its position on a simple two dimensional map according to its fit with level of attendance and lifestyle variables. This is illustrated in Figure 6.

Summary: linking together identified segments

Strong links were felt to exist between our findings and the approaches of Reichheld (1996), Peppers and Rogers (1993) and others who stress segmenting according to customer value. The value variable was also a surrogate for other variables such as repertoire purchase, behavioural characteristics such as purchase of tickets and match day behaviour, and attitudes to winning and entertainment. This is illustrated as a model in Figure 7.

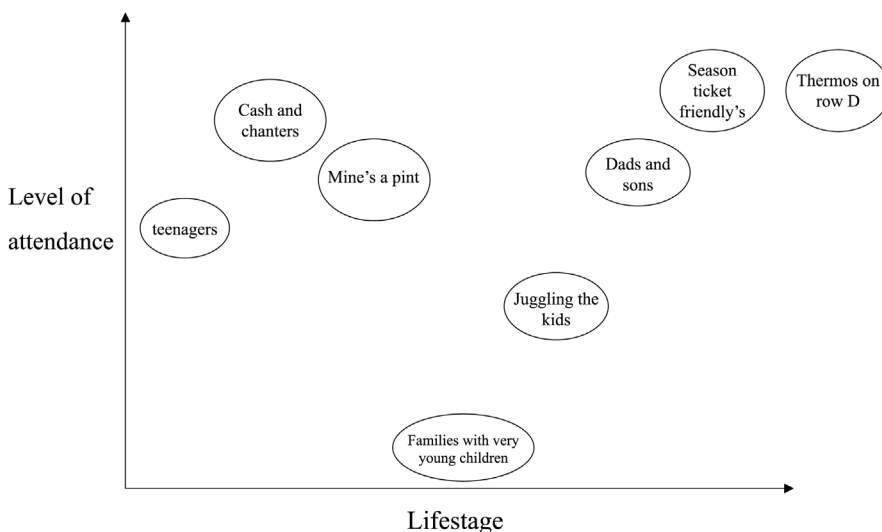


Figure 6.
Behaviour-based
segments mapped
against level of
attendance and lifestyle

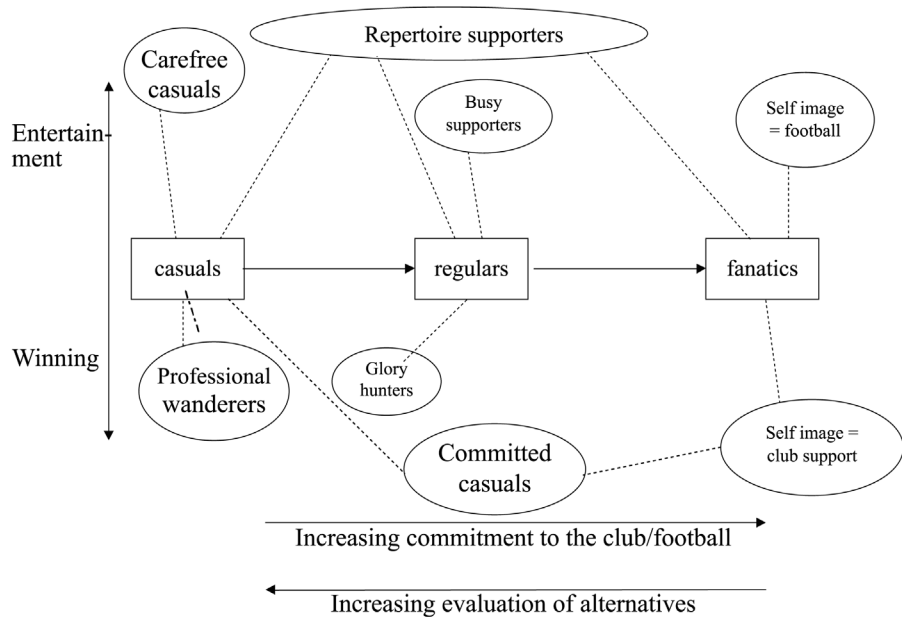


Figure 7.
Linking together sub
groups of “casuals”,
“regular” and “fanatic”
supporters

Further work

The methodology chosen lends itself to high internal validity. The survey instrument is informed by exploratory interviews, a literature review and was contextualised within an ongoing partnership with the club over a number of years, which has allowed us a broader understanding of the issues. The external validity is not as robust, however, with the survey requiring replication across other clubs and across national boundaries.

Conclusion

Throughout this research the authors have attempted to balance the often conflicting contributions of the “segmentation debate” to the academic world and to the practitioner. Often, the practitioner is keen to pursue tangible and quick routes to achieving their objectives. In the sports sector, these may be maximising attendance and revenue. The academic is keen to “model” the realities and build frameworks into which we can neatly fit clearly identified groups of individuals that can be labelled as a segment. However, as Dibb and Somkin (1997) point out, segmentation is hard work and difficult to do.

The authors have identified previous work in the professional sport area (Mullin *et al.*, 2000; Quick and Van Leuwen, 1998) where attempts have been made to segment supporters groups normally by one or two variables. This is often either by demographic, usage level or psychographic. In this research the authors have attempted to use a single club approach with both qualitative and quantitative methodologies to investigate the complex set of relationships associated with various variables available to segment football supporters. These included geodemographics, psychographics, and benefits sought, with

particular focus on loyalty and usage to include frequency of purchase and the process of consumption of the product.

The qualitative phase allowed the authors to identify the key issues which were further investigated in the quantitative research. The key findings are in some ways predictable and reinforce previously held views and yet in other ways produce potentially ground breaking results in this industry sector. The commonly held view of football supporters moving more towards a heterogeneous mix of social classes with an increasing number of female supporters was broadly supported. The so called “fanatic” hard core supporter who lives close to and associates very strongly with “their club” does still exist, albeit perhaps in less numbers, and in a number of cases with a more flexible behaviour towards viewing other teams.

Where the research began to uncover some interesting new findings was in the complex area of supporters’ attitudes, their views on loyalty and their behaviour both in terms of the frequency of purchase and their method of consumption of the product. Other research had identified so called light, medium and heavy user groups (see Mullin *et al.*, 2000) but none had identified “professional wanderer” groups who held allegiances to a number of clubs and were often more interested in ease of access, payment method and entertainment than they were in winning. This research also uncovered groups of casual supporters who initially appeared to be a homogeneous segment in that they attended similar numbers of games each season. However, further investigation highlighted significant differences between so called “committed casuals” and “carefree casuals” (see previous list).

Through the in-depth interviews and to some extent the quantitative results the authors were able to postulate a new segmentation typology based on attendance level, behaviour and lifestyle (see Figure 6). Whilst some of these segments appear to be attractive in terms of their “labels” for media headlines (“juggling the kids”, “mine’s a pint”), they also highlight that behind the supporter masses lie complex sub-groups worthy of more investigation. From an academic viewpoint this work supports the need to examine unusual sectors (like sport) in an individual manner. Finally, the hope is that this research will contribute to the academic debate on segmentation, in particular by highlighting the need to provide segmentation options that have accessibility and economic value for practitioners.

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