

ANNEX 6

Attendance / Stadium Trends

Introduction

As part of the community stadium outline business case match day attendance data has been researched and analysed for football and rugby league clubs. The data has been used to assess supporter demand as well as the impact a new stadium could have on attendance.

Match day attendances are crucial because they have a direct impact on revenue streams. Supporters also contribute to intangible benefits such as creating an atmosphere at the game which can also be linked to the performance of a team.

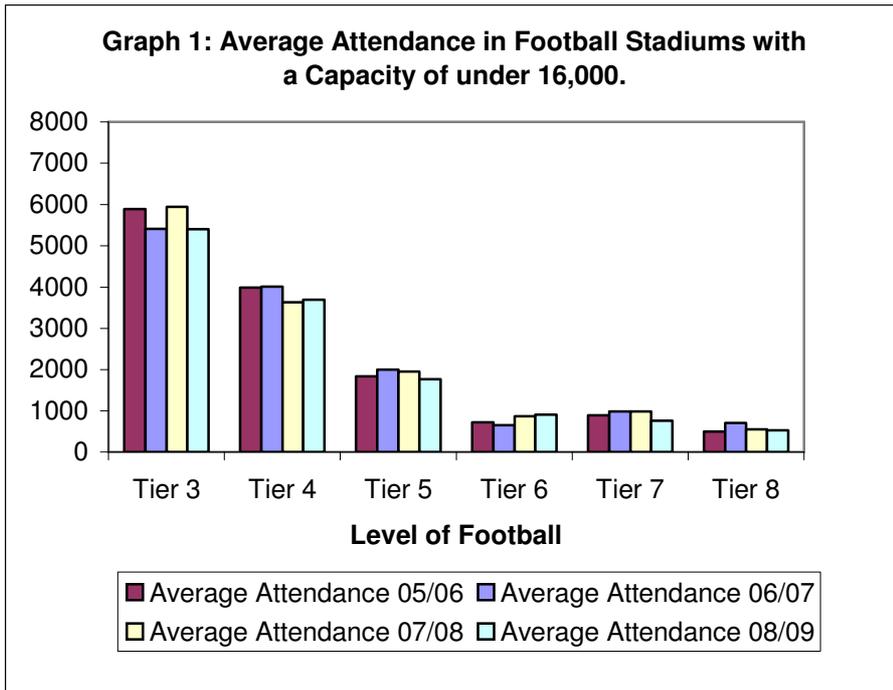
A database has been collated which primarily includes statistics from stadiums with a capacity of under 16,000. This is to keep the research proportionate and reflect the potential capacity that the community stadium could one day achieve. The information publicly available in regards to the rugby league is limited and therefore this report mainly centres on football attendances.

Findings

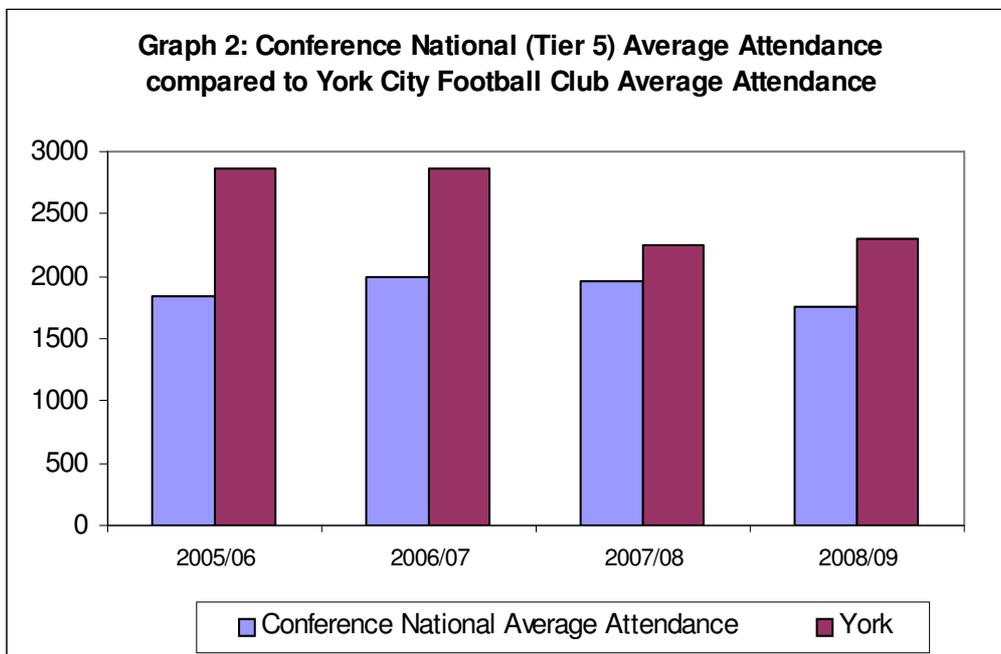
Average Attendance

Graph 1 below shows average football match attendance by football tier over the past four years. There is an obvious correlation between the level of football and the level of attendance. York City Football Club is currently in Tier 5 (Conference National)¹. The graph shows a considerable increase in average attendance between Tier 5 and Tier 4. The graph also shows a significant decrease in average attendance between Tier 5 and Tier 4. Therefore York City Football Club could see a considerable change in attendance if they were to be either promoted or relegated.

¹ For an explanation of the different football tiers please see the end of the report.



However York City Football Club have a higher than average attendance compared to other teams in the Conference National. This shows that York could have a stronger and more loyal supporter base compared to other Tier 5 teams.



Supporter Base

The proportion of York’s population who attend York City Football Club home matches is currently less than other teams in Tier 5. 2008/09 average attendance shows that York City Football Club’s support base is

approximately 1.27% of York's population². This is lower than many other clubs, for example Oxford United (3.82%), Cambridge United (3.28%) and Wrexham (2.56%), which could mean that there is potential to increase average attendance. Approximately 6.71% of York's population went to see the final of the FA Trophy at Wembley. Though playing at Wembley is an infrequent opportunity it shows that an increased supporter base could be realised which could mirror that of Oxford United, Cambridge United and Wrexham.

Performance

There is a clear link between average attendance and team performance. As a rule if a team perform well then average attendance increases. Additionally attendance decreases if a team perform poorly or get demoted. This is

Team	Promotion, Relegation and Performance	Affect on attendance
Accrington Stanley	Performance: 2007/08 finished 17 th in the table	-27.74%
AFC Telford United	Performance: 2006/07 finished 3 rd in table	44.74%
Barrow AFC	Performance: 2007/08 finished 5th in the table	36.35%
Boston United	Relegation: Tier 4 (06/07) to Tier 6 (07/08)	-31.75%
Cambridge United	Performance: 2006/07 finished 2 nd in the table	36.33%
Exeter City	Promotion: Tier 5 (07/08) to Tier 4 (08/09)	33.31%
Histon	Promotion: Tier 6 (06/07) to Tier 5 (07/08)	34.56%
Luton Town	Relegation: Tier 2 (06/07) to Tier 3 (07/08)	-24.34%
Mansfield Town	Relegation: Tier 4 (07/08) to Tier 5 (08/09)	-14.08%
Rushden and Diamonds	Relegation: Tier 4 (05/06) to Tier 5 (06/07)	-35.33%
Salisbury City	Promotion: Tier 6 (06/07) to Tier 5 (07/08)	38.01%
Tamworth	Relegation: Tier 5 (06/07) to Tier 6 (07/08)	-28.18%

demonstrated in the table below:

Additionally there can be a detrimental effect on average attendance if a club goes into administration. When a club announces that it is going into administration they are deducted 10 points by the Football Association. In some cases, for example Wrexham (2004/05) and AFC Bournemouth (2007/08) the loss of these 10 points have seen them finish the season in the relegation zone. AFC Bournemouth average attendance suffered the following season with a drop of 10.41%. Administration cost Darlington a place in the play offs in 2008/09 and further penalties such as points deduction for failure to comply with the rules on insolvency prevented Leeds United from getting automatic promotion in 2007/08 which could have had an effect on potential attendance figures for both clubs.

Many teams that have gone into administration over the past five years are already in the relegation zone at the end of the season and so it is difficult to separate the effect of administration and the effect of relegation. Luton Town (relegated 2007/08), Rotherham (relegated 2006/07) and Boston United (relegated 2006/07) saw attendance figures drop by 7.3%, 11.8% and 31.8%

² All populations are based on figures published in the 2001 Census

respectively. Nevertheless there are anomalies to this pattern. Despite going into administration as well as being relegated both Cambridge United (2005/06) and Leeds United (2006/07) saw a rise in attendance in the following year of 36.33% and 22.8% respectively.

The Stadium Affect

Using recent examples there is enough evidence to show that a new stadium increases average attendance. The tables below demonstrate the percentage change in average attendance, where possible for both football and rugby league, three years before and after the new stadium was opened.

Football and Rugby League Attendance Analysis

Football Stadium (Football Team)	Pre-development Attendance (percentage change from previous year)			Opened	Post-development Attendance (percentage change from previous year)		
Stadiums with a capacity of over 16,000							
St Mary's Stadium (Southampton)	1998/99	1999/00	2000/01	2001	2001/02	2002/03	2003/04
	15,133 (-0.17%)	15,132 (-0.01%)	15,115 (-0.11%)		30,633 (102.67%)	30,680 (0.15%)	31,699 (3.32%)
Liberty Stadium (Swansea)	2002/03	2003/04	2004/05	2005	2005/06	2006/07	2007/08
	5,160 (39.84%)	6,853 (32.81%)	8,458 (23.42%)		14,112 (66.9%)	12,720 (-9.86%)	13,520 (6.29%)
Riverside Stadium (Middlesbrough)	1992/93	1993/94	1994/95	1995	1995/96	1996/97	1997/98
	16,724 (13.70%)	10,400 (-37.81%)	18,710 (79.90%)		29,257 (56.37%)	29,871 (2.10%)	29,997 (0.42%)
The Northern Echo Darlington Arena (Darlington)	2000/01	2001/02	2002/03	2003	2003/04	2004/05	2005/06
	3,817 (-30.89%)	4,107 (7.6%)	3,312 (-19.36%)		5,023 (51.6%)	4,245 (-15.49%)	4,199 (-1.08%)
Madejski Stadium (Reading)	1995/96	1996/97	1997/98	1998	1998/99	1999/00	2000/01
	8,917 (-4.63%)	9,165 (2.78%)	9,676 (5.58%)		11,262 (16.40%)	8,985 (-20.22%)	12,647 (40.76%)
The Stadium of Light (Sunderland)	1994/95	1995/96	1996/97	1997	1997/98	1998/99	1999/00
	15,476 (-8.95%)	17,504 (13.10%)	20,847 (19.10%)		34,337 (64.71%)	38,745 (12.84%)	41,375 (6.79%)
KC Stadium (Hull)	1999/00	2000/01	2001/02	2002	2002/03	2003/04	2004/05
	5,736 (-4.80%)	6,684 (16.52%)	9,506 (42.22%)		12,843 (35.10%)	16,847 (31.18%)	18,025 (6.99%)
Britannia Stadium (Stoke)	1994/95	1995/96	1996/97	1997	1997/98	1998/99	1999/00
	12,875 (-19.35)	12,279 (-4.63%)	12,748 (3.82%)		15,003 (17.69%)	12,735 (-15.17%)	11,426 (-6.79%)
Stadiums with a capacity of under 16,000							
Princes Park (Dartford)	2003/04	2004/05	2005/06	2006	2006/07	2007/08	2008/09
	235	260 (10.64%)	291 (11.92%)		1171 (302.41%)	1135 (3.07%)	1118 (-1.50%)
Pirelli Stadium (Burton Albion)	2002/03	2003/04	2004/05	2005	2005/06	2006/07	2007/08
	1746	1698 (-2.75%)	1368 (-19.43%)		1724 (26.02%)	1869 (8.41%)	1815 (-2.89%)

Football and Rugby League Attendance Analysis

Keepmoat Stadium (Doncaster Rovers)	2003/04	2004/05	2005/06	2006	2006/07	2007/08	2008/09
	6939 (96.02%)	6886 (-0.76%)	6139 (-10.85%)		7725 (25.83%)	7978 (3.28%)	11961 (49.92%)
The New Lawn (Forest Green Rovers)	2003/04	2004/05	2005/06	2006	2006/07	2007/08	2008/09
	902	855 (-5.21%)	977 (14.27%)		1185 (21.29%)	1178 (-0.59%)	955 (-18.93%)
Kassam Stadium (Oxford United)	1998/99	1999/00	2000/01	2001	2001/02	2002/03	2003/04
	7,056 (-5.77)	5,790 (17.94%)	5,148 (11.09%)		6,257 (21.54%)	5,862 (-6.31%)	6,296 (7.40%)
New Meadow (Shrewsbury Town)	2004/05	2005/06	2006/07	2007	2007/08	2008/09	
	4,251 (6.09%)	3,997 (5.98%)	4,730 (15.50%)		5,659 (19.64%)	5664 (-0.09%)	N/A
Adams Park (Wycombe Wanderers)	1998/99	1999/00	2000/01	2001 (renovated)	2001/02	2002/03	2003/04
	5,121 (-5.41%)	5,101 (-0.39)	5,549 (8.78%)		6,621 (19.32%)	6,002 (-9.35%)	5,256 (-12.43)
Spotland (Rochdale)	1997/98	1998/99	1999/00	2000 (renovated)	2000/01	2001/02	2002/03
	1,884 (1.89%)	2,113 (12.15%)	2,774 (31.28%)		3,249 (17.12%)	3,431 (5.60%)	2,740 (-20.14%)

Rugby Stadium (Rugby Team)	Pre-development Attendance (percentage change from previous year)		Opened	Post-development Attendance (percentage change from previous year)		
KC Stadium (Hull F.C)	2002/03		2003	2003/04	2004/05	2005/06
		6928		11598 (67.41%)	11458 (-1.21%)	10639 (-7.15%)
Halliwell Jones Stadium (Warrington Wolves)	2003/04		2004	2004/05	2005/06	2006/07
		7031		9889 (40.65%)	11003 (11.27%)	10406 (-5.43%)
JJB Stadium (Wigan Warriors)	1999/2000		2000	2000/01	2001/02	2002/03
		8526		10533 (23.51%)	11454 (8.74%)	10439 (-8.86%)
Keepmoat Stadium (Doncaster RLFC)	2006/07		2007	2007/08	2008/09	2009/10
		1140		1680 (46.37%)	N/A	N/A

Football and Rugby League Attendance Analysis

The tables above show that average attendance increases for both football and rugby league teams in the first year that the stadium opened. Of the football examples used Dartford has the highest increase in crowd size of 302.41% and Reading the lowest at 16.40%. Overall football attendance increases by an average of 48.44% in the first year of a stadium opening. Using the rugby league figures available Hull have the highest level of increased attendance of 67.41% and Wigan have the lowest increase at 23.51%. The average increase for Rugby League attendance is 42.65% in the first year of opening.

In the following years the pattern of average attendance shows increases as well as decreases because factors such as performance can start to play a role in encouraging or dissuading crowds. However when comparing attendance for the final year in the old stadium with third year in the new stadium, all but three of the clubs have overall increased attendance. Two of these stadiums, Adams Park (Wycombe Wanderers) and Spotland (Rochdale) are examples of stadium renovation and perhaps show that on-site improvements do not sustain increased crowd numbers as successfully newly build stadiums.

Conclusion

York City Football Club currently has a higher than average level of attendance when compared to other Tier 5 teams. However the proportion of the population attending matches fall short of other teams in the same tier. This could mean that the current supporter base has the potential to be increased and therefore realise similar levels as other teams. Furthermore a community stadium development in York could see, facilitate and sustain an increase in average attendance for both football and rugby league games. Yet as demonstrated in the evidence above the performance of a club on the field as well as financially could affect attendance. Consequently a new stadium could increase attendance but club performance could affect the crowd numbers in the longer term.

An explanation of the tiers in football

Tier	League/Divisions
1	Premier League
2	Football League Championship
3	Football League One
4	Football League Two
5	Conference National
6	Conference North Conference South
7	Northern Premier League Premier Division Southern Football League Premier Division Isthmian League Football Premier Division
8	Northern Premier League Division One North Northern Premier League Division One South Southern Football League Division Midlands Southern Football League Division South and

Football and Rugby League Attendance Analysis

	West Isthmian League Football Division One North Isthmian League Football Division One South
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