

# Consumer psychology of rugby supporters

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March 22<sup>nd</sup> 2005

## 1 Background

The Prospectory researches the consumer psychology of 'experiential products', i.e. products whose primary value is 'an experience' rather than a tangible item. Rugby, sailing, horse racing, tourism, art and theatre, for example, all fall into this category.

Over the past two years, we have done a number of research studies into Welsh rugby support, principally working with the Llanelli Scarlets to increase their match attendance and identify new sources of consumer revenue for them.

Our research consists of a mix of paper and on-line surveys combined with interviews, discussion groups and, occasionally, observational studies. Our aim is to uncover the fundamental psychological drives which underpin people's behaviours, values and attitudes in response to experiential products.

This note summarises some of our findings about rugby 'consumers' which might be relevant to 'consumers' of horse racing events.

## 2 Rugby findings

### 2.1 Motivations

An analysis of rugby supporters' conversation showed that the core motivations for being a rugby supporter are not, in fact, rugby specific. They are based on 3 fundamental<sup>2</sup> human needs that supporting a rugby team fulfil:

1. The need for drama/sensation in everyday life – people experience an intense buzz of excitement from watching their team play. The more emotionally invested they are with the team, the more intense the drama.
2. The need to belong to a community or social group – people experience an emotional high from the bonding which comes out of sharing the intense highs and lows of rugby drama.
3. The need to develop and reinforce a sense of one's own uniqueness and self-worth – people gain a strong sense of their own identity from being a supporter of their chosen club. Rivalries with other clubs (or nations!) are a necessary part of establishing this sense of uniqueness and self-worth.

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<sup>1</sup> [www.prospectory.co.uk](http://www.prospectory.co.uk)

<sup>2</sup> By 'fundamental', I mean the needs which *all* humans share and therefore will find some way of fulfilling – rugby or horse racing are simply a means to do so.

### 2.1.1 Drama

This is the element which proves most addictive to consumers. They can get a ‘high’ (literally) from experiencing dramatic moments of the match. It has long been known that athletes’ testosterone levels increase during the excitement of the game. Recent research has shown that highly engaged soccer or basketball supporters have testosterone levels that mirror those of the players. The supporters of the winning side can experience a 28% increase in testosterone<sup>3</sup> whilst the losing supporters experience a 27% decrease. Research has also shown that there is a direct correlation between excitement levels and one’s physical distance from the action. It would very interesting to test for this effect at horse races.

Rugby matches (and I assume horse races) are events where the crowd shout their encouragement or delight at the tops of their voices. The rugby supporters (particularly ladies) pointed out that rugby matches were the *only* place where they could shout with complete abandon and they found it a great way of releasing the stress of their everyday lives. They are right – shouting (for any reason) releases endorphins into our bloodstream which create a ‘feel good factor’ and reduce the risk of heart disease etc.

In rugby’s case, the emotional buzz is directly related to the degree of identification (i.e. emotional investment) which a supporter has in his or her team. In racing’s case, the equivalent might be the consumer’s knowledge of or engagement with individual horses or (obviously) the money they have invested in them winning. Ways of enabling ordinary consumers to have a ‘share’ (however small) in particular horses will increase their emotional investment and therefore the power and addictive nature of the drama.

In the case of rugby, we found that the following factors were the most critical in creating or heightening a powerful sense of drama:-

- A long tense build up and a totally unpredictable outcome (i.e. no-one knows or has choreographed the result).
- Immediacy of physical action and sensation – (i.e. seeing the steam rise from the players, hearing the thud of a tackle, even catching the ball when it is kicked into the stands).
- Being directly involved as an actor in the drama – feeling you can affect the outcome.
- The possibility of emotional highs and lows.
- Mingling with stars.
- Acoustic Atmosphere – the effect of the stand design on acoustics is very important.<sup>4</sup>
- Large crowds – a large crowd creates a buzz and a sense of being a ‘happening place’ in and of itself.
- Well-defined heroes and villains – exercising rivalries (not so relevant to racing, I imagine!).

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<sup>3</sup> Measured via saliva samples.

<sup>4</sup> Acoustic atmosphere is the dominant factor in football supporters’ ratings of stadia they have visited for matches.

### 2.1.2 Social

Analysis of the sense of social bonding shows that the main factors involved are:-

- Sharing moments of intense emotion at exactly the same time. This creates very powerful bonding - even between strangers.
- Singing or shouting together – communal singing (of any kind) is known to create a powerful bond.
- Enjoying the *same* activity and emotions across age groups. Families talked about the bonding effect of attending a match together because parents, children, siblings were entering into and enjoying the *same* thing. Children (up to a certain critical age!) love to see their parents letting themselves go shouting and screaming because normally this is ‘frowned on’ behaviour!

Modern family life offers few opportunities for this to happen so this is a USP for sports matches and racing events. This factor was a particularly important to women who will seek out these kinds of shared experiences to keep their family together.

### 2.1.3 Identity

In rugby, identification with *your* team is a huge factor for the most committed supporters. Their own sense of personal status is tightly bound to that of the team and hence the intense rivalries with other teams in the area.

These supporters are almost boundless consumers of merchandise which allows them to display their identification with their team.

Obviously, racing does not have the same notion of identification with a home side or team which represents you (unless, I assume, you actually own a horse). However, going regularly to the races may still form an important sense of someone’s identity.

People’s sense of identity and status used to be determined by their social class, employment and membership of large institutions (church, political party, etc). In our post-modern world, individuals construct their own ‘life-style’ based identities by mixing and matching the kinds of consumer brands they favour, the clothes they wear, the kind of house they live in, the activities they engage in and even the food and wine they consume. Consciously or unconsciously, people will find ways to display these lifestyle markers to others in order to signal how successful, talented or wealthy they are, how individualistic or conformist they are, how big a social network they have or simply how interesting they are. If someone is into horse racing, you can guarantee that they will seek out subtle (or not so subtle!) ways to state that interest to a wider audience as it forms an important part of how they see themselves and wish others to see them too. Chepstow racing merchandise (ranging from the blatant to the discreet) will be jumped on by people wishing to mark out this aspect of their lives.

## 2.2 Attendance patterns

Alongside the motivational research, we have been collecting data on attendance patterns at rugby matches throughout the season.

This research revealed the surprising (to us anyway) finding that 20% of the crowd at *any*<sup>5</sup> Scarlets match attend only 1 or 2 matches a season. In fact, 50% of the entire ‘supporter base’ only attend 1 or 2 matches a season. And, because there are far more individuals in this ‘occasional’ category, they actually represent the same proportion of revenue for The Scarlets as the ‘hard core’ season ticket holders who attend every match<sup>6</sup>.

Analysis of the few profit making clubs in English rugby suggests that the days of an enormous ‘hard core’ support are gone and the new revenue growth is in these ‘occasional theatre-goers’, as we have termed them. In the case of rugby, 38% of the Welsh population<sup>7</sup> have an interest in rugby and, if each of those people attended one regional match a season, all 4 regional grounds would be full to capacity for every match. The challenge, of course, is reaching this ‘occasional’ population who are not rugby (or racing) centric and who will consider attending a sporting event simply as one kind of day out for the family. Informing them of such events and making them accessible to the outsider are now the lessons we are trying to implement.

### 2.3 Customer segmentation

The data on attendance patterns combined with the data on different motivation patterns provide us with 4 distinct customer segments:-

1. Hard core – these are the most committed supporters who attend every match and whose identities are most closely tied up with the team. They tend to have a lower socio-demographic profile but spend significant amounts on tickets, travel, liquid refreshment and merchandise because rugby is their identity and life. Changing the names of teams (e.g. Dragons from Newport RFC) has the biggest negative impact on this segment. Increasing their number is hard.
2. Social habitual – these supporters attend the majority of matches. For them, following rugby is primarily social – they come because it’s what they ‘always do’ with their family and friends on a particular afternoon or evening of the week. Changing the time or location of matches has the biggest impact on these supporters because it breaks their social habits, e.g. the pub they meet in, who they sit with, etc. Friday night rugby, interestingly, is creating a new set of social habituals – large groups of teenage boys *and* girls. We believe there is real opportunity to grow this sector by enabling social groups and interaction to form which are enhanced by the event and the facilities offered<sup>8</sup>.
3. Big match traditionalist – these tend to be the older male supporters who like to attend Internationals and other big cup games *only*. They have little interest or identification with a team on a week to week basis. There is little one can do to grow this sector other than having more big matches!
4. Occasional theatre-goer – as already discussed, this is the fastest growing sector of rugby support. These people (often families) consider rugby as one of a range of occasional entertainment products or ‘days out’ which they can enjoy with friends or family. They may attend 1 or 2 matches a season. They are often from a higher socio-demographic

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<sup>5</sup> i.e. not just the high profile matches.

<sup>6</sup> i.e. the committed supporters generate much higher revenue per head but there are far fewer of them.

<sup>7</sup> Data from Mori.

<sup>8</sup> For example, a few years ago, Newport RFC had attracted a large collection of single mothers who had found that it was a great place to go where the kids were happy and safe and they could meet some attractive men!

group which, coupled with the fact that this is a one-off event for them, makes them less price sensitive and they are likely to spend more at the ground on both refreshments and merchandise as part and parcel of their 'day out'.

### **3 Concluding comment**

Our consumer psychology research has helped us understand the motivations and behaviour patterns of rugby supporters and thus identify customer segments who value very different aspects of the overall product and offer different revenue opportunities.

Any experiential product will offer consumers a way of meeting fundamental human needs. The trick is figuring out exactly which needs are driving the consumption of the product and whether it could be adapted or expanded to meet these needs more effectively. We'd be intrigued to know what drives horse racing as a consumer product, if you ever want help finding out!