

Premier League returns with record audiences

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Anthony Goddard, head of media research, Publicis Sport & Entertainment, delves into the numbers to see how the UK's football public returned to their seats for Premier League action after the Covid-19 enforced hiatus.

Last Wednesday's return of the Premier League marked a gradual step back to normality for millions of UK (and international) football fans starved of their regular fix of action for almost one hundred days.

Before I delve into the numbers, a quick update on the revised Premier League broadcast landscape for the remainder of the season: Sky Sports will air 64 matches, 25 of those matches will air on Sky's free-to-air (FTA) channel Pick with the remaining 39 airing across Sky Sports Pay-TV channels. 20 matches will air across BT Sport's Pay-TV channels, four matches will receive FTA coverage on the BBC and four will be shown FTA by Amazon.

Healthy appetite for free-to-air and Pay-TV coverage

Of the 13 post-suspension matches so far aired by Sky Sports, only one (West Ham v Wolves) failed to eclipse the broadcaster's pre-suspension whistle-to-whistle average match audience of 1.559 million viewers. Indeed three of the thirteen matches that Sky Sports has aired since the resumption now rank amongst the broadcasters top ten-rated Premier League matches of the season to date. Interestingly, only one of the matches (Everton v Liverpool) that Sky has made available on its FTA Pick TV platform makes that top ten list.

Post-suspension Match Audiences versus Channels Pre-Suspension Average

Broadcaster	Date	Start time	Programme Title	Average Audience (000's)	% Diff. versus pre-suspension average for that broadcaster
Sky Sports	17-Jun	18:00	Aston Villa v Sheffield United	2,302	47.6
Sky Sports	17-Jun	20:15	Manchester City v Arsenal	3,107	99.3
Sky Sports*	19-Jun	18:00	Norwich City v Southampton	2,413	54.7
Sky Sports	19-Jun	20:15	Tottenham Hotspur v Manchester United	3,188	104.4
BT	20-Jun	12:30	Watford v Leicester City	592	-16.2
BT	20-Jun	15:00	Brighton v Arsenal	850	20.4
Sky Sports	20-Jun	17:30	West Ham United v Wolves	1,487	-4.6
BBC	20-Jun	19:45	Bournemouth v Crystal Palace	3,537	-
Sky Sports*	21-Jun	14:00	Newcastle United v Sheffield United	1,994	27.8
Sky Sports	21-Jun	16:15	Aston Villa v Chelsea	1,926	23.5
Sky Sports*	21-Jun	19:00	Everton v Liverpool	4,817	208.9
Sky Sports*	22-Jun	20:00	Manchester City v Burnley	2,297	47.3
Sky Sports	23-Jun	18:00	Leicester City v Brighton	2,173	39.3
Sky Sports	23-Jun	20:15	Tottenham Hotspur v West Ham United	1,833	17.5
Sky Sports*	24-Jun	18:00	Manchester United v Sheffield United	2,173	39.3
BT	24-Jun	18:00	Newcastle United v Aston Villa	198	-72.0
BT	24-Jun	18:00	Wolves v Bournemouth	91	-87.1
BBC	24-Jun	18:00	Norwich City v Everton	1,726	-
Sky Sports	24-Jun	20:15	Liverpool v Crystal Palace	2,114	35.6

**shown free-to-air on Pick TV as well as Sky Pay-TV channels.*

The Merseyside derby became reportedly the most watched Premier League match ever with an average viewership of 4.817 million, peaking at 5.517 million viewers mid-way through the second half. This beats the previous peak of 4.486 million viewers set by Manchester United v Manchester City in 2012 (average audience of 4.050 million). It should be noted that the 2012 match aired only on Sky's Pay-TV platform, though 60 per cent of the Everton v Liverpool 2020 audience came from the Pay-TV channels coverage.

The BBC has so far aired two matches, the first being Bournemouth v Crystal Palace which was shown on BBC1 during Saturday evening primetime. The match had a whistle-to-whistle average audience of 3.537 million viewers and a peak of 4.116 million.

This is roughly in line with BBC1's June average audience for the same time slot (approx. 3.4 million viewers). However, perhaps due to the heavy foot-traffic and churn on BBC1 during Saturday primetime, the match was actually seen by a total of 10.556 million people (those who watched at least one minute of coverage) meaning that this unlikely fixture could also lay claim to be the "most watched" in Premier League history (at least for now).

Interestingly, the average viewer of the BBC1 coverage watched 40 minutes of coverage versus over an hour per match for viewers of the thematic sports channels. This reflects the fact that viewers of these channels are more invested in the coverage that they are paying to watch.

Matches aired on BT Sport have received a more mixed reception; live whistle-to-whistle coverage of Brighton v Arsenal achieved an average of 850,100 viewers, which is 20 per cent higher than the broadcasters pre-suspension average but well below the seasons high of 1.502 million (Liverpool v Sheffield United).

Watford v Leicester City garnered an average of 591,500 viewers, 16% below the BT Sport season to date average of 721,000 viewers. Wednesday evening's matches, Newcastle United v Aston Villa and Wolves v Bournemouth (both 6pm kick-off), achieved audiences of 198,000 and 91,000 viewers respectively.

On Wednesday evening, there was the unique scenario of four Premier League matches airing simultaneously on UK television. These matches achieved a combined average audience of 4.187 million viewers, almost double the combined channels' typical audience in this time slot in June (2.110 million). 11.5 million viewers saw at least some Premier League coverage, 19 per cent of the potential audience. Impressive numbers considering the early kick-off time and unusually warm weather experienced across the UK.

Over 41 per cent of UK TV viewers have watched Premier League coverage since the restart. Since matches resumed, 25.179 million UK viewers have seen at least some Premier League coverage on linear TV, this represents over 41 per cent of the potential audience. The first match (Aston Villa v Sheffield United) reached almost a fifth of these viewers (4.853 million), with the BBC contributing a further 7.207 million "new" post-suspension viewers for their prime time coverage of Bournemouth v Crystal Palace.

TV audiences prefer crowd noise

Sky Sport's simulcast coverage has enabled the broadcaster to offer several different versions of match coverage; matches on Sky Sports Main Event have aired with artificially produced crowd noise while coverage on Sky Sports Premier League has aired without the crowd noise. For selected matches a "watch along" option has been available on Sky Sports Football, with former players and pundits watching the match and commentating/discussing.

Based on viewers who watched at least some coverage of the first match after the suspension (Aston Villa v Sheffield United) on both Main Event and Premier League channels, there was a clear preference for virtual crowd noise with an average of 58 minutes per viewer (compared to 45 minutes for no crowd noise).

Looking at viewers who watched only some of the coverage without crowd noise (3-15 minutes), 55 per cent subsequently switched to watching with the virtual crowd noise. However, the switching did not go the other way – just 14 per cent of viewers who watched only some of the footage with virtual crowd noise (3-15 minutes) subsequently went on to watch without crowd noise.

However, there is evidence to suggest that a significant population exists that prefers watching with no crowd noise. Out of the 2.14 million viewers who were watching the virtual crowd noise coverage of Man City v Arsenal at kick-off (the second match post lockdown), around 10% switched to the no crowd noise coverage during the match and stayed for the duration of the match. Furthermore, over 3/5ths of those who were watching the no crowd noise coverage at kick-off stayed with that coverage through to the end of the match.

Summer football proves to be a big draw – will this change in coming weeks?

The 19 matches broadcast so far have seen the Premier League pick up where it left off, with strong audiences for Sky Sports. This is not perhaps surprising, but it was far from certain that viewers would return in such large numbers given the glut of live matches, the unusual time of year for the competition, the lack of live crowds and the recent good weather in the UK. The unusual broadcast landscape, with the addition of live coverage on free-to-air channels for the first time in Premier League history, has propelled viewing to unprecedented heights, breaking both the all-time peak audience and 1 minute reach records.

One caveat to the impressive viewing figures is the continuing lockdown on public gatherings in pubs, clubs, etc. in the UK, meaning that viewers who may previously have watched matches out-of-home (and hence not been included in the viewing figures) are now watching from their sofas and are being picked up in the TV Audience Measurement figures.

It remains to be seen to what extent viewership will remain high if lockdown restrictions are eased, especially after Liverpool have secured what seems to be their inevitable title win and other sports make their gradual return to our screens.

However, the fact that Sky's strongest audiences have come for matches involving the clubs with biggest fan bases (Manchester United, Liverpool, Manchester City, Arsenal, Tottenham) suggests that the primary motivator for watching football on TV is still supporting your club, a factor that is unlikely to change whatever the prevailing conditions.

Source: BARB / Publicis Sport and Entertainment

Notes – Whistle-to-whistle audiences based on the average audience for two hours immediately following kick-off.

The audiences for simulcast matches on Sky Sports channels have been aggregated.