



Insight into Awareness and Interest,  
Patronage and Consumption, and Commerce

## **An African Sports Survey Report**

**December 2020**



Asante Kotoko players celebrate



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Diawisie Taylor of Karela United

## INTRODUCTION ■

**F**andom and commercial opportunities for football have seen massive changes over the years as globalisation, technology and digital revolution continue to proliferate. These have come with as many challenges as they have opportunities. If the wave was not enough reason to explore new ways to keep afloat the sports business stream, the Covid-19 pandemic has made change in the present time an absolute necessity for sport properties and industry business entities.

Like many other football championships around the world, the Ghana Premier League (GPL) has been heavily impacted by the novel coronavirus - both positively and negatively. While matchday revenue has been hugely disrupted, there has been a surge in fans online more than ever. These are just two examples of the many intricate challenges and opportunities at hand in the current times. The need to know and understand one's fanbase in sports, therefore, has never been more important as this helps to identify opportunities and form best commercialisation strategies.

With fans at the centre of sports, their study remains paramount to revenue generation.

For a league rising from the ashes of recent instability, calendar disruptions and low patronage, the need for thorough fan evaluation cannot be underemphasised.

The African Sports Centre (ASC) is an organisation championing the use of scientific and technical methodologies and innovations for the development of sports, largely by data, research and technology. We undertook a nation-wide survey on the Ghana Premier League to dig into the championship's fandom, focusing on Awareness and Interest, Patronage and Consumption, and Commerce.



Gladson Awako and Great Olympics teammates celebrate

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## KEY TAKEAWAYS

1. ASC's 2020 survey found a significant rise (8%) in general football interest, with an accompanying significant increase (15%) in awareness of the Ghana Premier League (GPL), but with relatively small increase (2%) in the GPL following numbers over the past year.

2. Asante Kotoko and Hearts of Oak's reputation as Ghana's 'big boys clubs' remains unquestionable. Together, they hold 67% of the GPL fanbase.

3. Football followers in Ghana are open to supporting 'smaller' teams who show top branding, management and professionalism. Legon Cities provides a good case study.

4. Marquee signings are an effective way of drawing more fans to a club. Legon Cities (Asamoah Gyan) and Asante Kotoko (Fabio Gama Dos Santos) exemplify benefits of this avenue.

5. People in Ghana are increasingly coming to terms with Pay TV as a means of following their favourite leagues: 52% of 2020 survey respondents indicated openness to Pay TV subscription, a change from 38% in 2019.

6. There has been a paradigm shift in ideal league football preference in favour of the GPL but people, in practice, paradoxically consume more foreign league football.

7. Fan preference for stadium attendance (as an ultimate means of football consumption) over media coverage has not changed despite safety concerns relating to the Covid-19 pandemic. Nevertheless, a lesser amount of people are now willing to attend matches.

8. Over-the-top (O-T-T) platforms remain a viable revenue source but other confounding variables such as internet cost may pose a challenge.

9. A year-on-year rise (8%) in GPL clubs jersey ownership among fans represents a positive future for the merchandising industry as does the 29% growth in fan willingness to purchase jerseys of clubs they do not support.

10. The Betting industry, contributing most to shirt sponsorship in the GPL, is a key contributor to football development in Ghana amid recorded rise in patronage (10%) and intention to patronise (18%).

# The Ghana Premier League

**T**he Ghana Premier League sits atop the West African nation's men's professional league system.

The maiden organised league in the country came off in 1958, following national independence in 1957 and affiliations to the Confederation of African Football (CAF) and the Federation of International Football Association (FIFA).

The Ghana Football Association's Professional League Management Committee oversees the annual championship, which was ranked the 11th best in Africa and 65th in the world in the first Decade of the 21st Century by the International Federation of Football History and Statistics (IFFHS)

Asante Kotoko, with 23 titles to their name, are the most successful club in the competition, boasting four more wins than arch-rivals and closest contenders, Hearts of Oak. Following the abrupt suspension and subsequent annulment of the 2017-2018 season midway as a consequence of a corruption scandal, and further disruption of the 2019-2020 season by the coronavirus pandemic, Aduana Stars remain the cup holders after coming out on top in the 2016-2017 season. The league has seen eleven winners since its inception.

Ghanaians consider themselves a 'football nation', and



the resulting popularity of the sport in the country means that the league is widely followed. The high status of the sport has been positively enhanced by the early successes of the senior men's national team, the Black Stars, at the Africa Cup of Nations (AFCON) between the 1960s and early 1980s - the Black Stars won four AFCON titles during that period.

The 2020-2021 Ghana Premier League season is the 58th edition (excluding the annulled 2017-18 edition), with the 34-week campaign beginning on 14 November, 2020 and scheduled to run until July 2021.

The present season is Ghana's second successive campaign of an 18-club Premier League championship, a change from 16 made ahead of start of the 2019-2020 term. The competing teams face one another in a home-and-away round-robin format, with the team at the top of the league table crowned champions at the end of the season. The bottom three clubs, meanwhile, are relegated to the Ghana Division One League, the second tier of the football pyramid.

The league winners will also attain the coveted reward of representing Ghana in the 2021-2022 CAF Champions League.



**Table 1.** The 18 Ghana Premier League clubs, their number of titles won, 2020-21 home ground, ground location and capacity

Club	Number of Titles	2020-21 Home Ground	Ground Location	Ground Capacity
Asante Kotoko	23	Accra Sports Stadium	Accra	40,000
Hearts of Oak	19	Accra Sports Stadium	Accra	40,000
Ashanti Gold	4	Len Clay Stadium	Obuasi	25,000
Aduana Stars	2	Nana Agyeman Badu I Stadium	Dormaa Ahenkro	10,000
Great Olympics	2	Accra Sports Stadium	Accra	40,000
Berekum Chelsea	1	Golden City Park	Berekum	6,000
Ebussua Dwarfs	1	Cape Coast Stadium	Cape Coast	15,000
Legon Cities	1	Accra Sports Stadium	Accra	40,000
Bechem United	0	Nana Fosu Gyeabour Park	Bechem	4,000
Dreams FC	0	Theatre of Dreams	Dawu	4,000
Eleven Wonders	0	Ohene Ameyaw Park	Techiman	6,000
Elmina Sharks	0	Nduom Sports Stadium	Elmina	6,000
Inter Allies	0	Accra Sports Stadium	Accra	40,000
Karela United	0	Crosby Awuah Memorial Park	Aiyinase	6,000
King Faisal	0	Ohene Ameyaw Park	Techiman	6,000
Liberty Professionals	0	Carl Reindorf Park	Dansoman	6,000
Medeama	0	Akoon Park	Tarkwa	4,000
WAFA	0	WAFA Sports Complex	Sogakope	4,000

Ground Capacity Source: Ghana Football Association



## The Study

**A**SC's Ghana Premier League survey was conducted before the start of the domestic football season in Ghana between October and November 2020. Data was collected in every administrative district within each of the country's 16 regions, seeking individuals' thoughts on the Ghana Premier League.

The study had a sample size of 3300 participants, with the number of respondents for each region allocated based on the region's share of Ghana's total population.

A combination of online, face-to-face and mobile data collection methods was used in data collection to ensure the study did not only capture perspectives of the highly-educated population – some of whom are most likely to be found online – but also included those of the less educated population who are less likely to be found online. Again, the face-to-face approach ensured sampling of participants of both sexes and at different levels of age, education and financial backgrounds. Also, to ensure a more representative sample, data was collected from every district in each administrative region of the country, and as well from urban and rural communities, elite residential areas and inner cities.



Stephen Amankonah of Berekum Chelsea

The study focused on the following areas:

- Awareness and Interest
- Patronage and Consumption
- Commerce

There was a total of 37 questions in the survey questionnaire. Each respondent was initially asked questions regarding their demography and general interest in football and awareness of the Ghana Premier League. Only respondents who answered that they “know of the Ghana Premier League” and “follow the Ghana Premier League” went on to answer the remainder of the questions regarding Awareness and Interest, Patronage and Consumption and Commerce.



**Map of Ghana showing regional location of the various Premier League clubs**

# Survey Demographics

**Table 2.** Breakdown of survey demographics at levels of region, gender, education and age

## REGION

Region	Percentage of Sample Size
Ashanti	19.2
Greater Accra	16.3
Eastern	10.7
Central	8.4
Western	7.2
Northern	6.3
Volta	6.2
Upper East	4.2
Bono	3.8
Bono East	3.7
Western North	3.0
Upper West	2.8
Oti	2.5
Ahafo	2.0
Savannah	1.9
North East	1.9

## GENDER

Gender	Percentage of Sample Size
Male	71.5
Female	28.5

## EDUCATION

Education	Percentage of Sample Size
No formal education	21.3
Basic education (primary)	7.7
Junior High School (JHS/JSS/Middle School)	15.0
Secondary/Vocational	26.0
Tertiary	30.0

## AGE

Age Range	Percentage of Sample Size
14 and below	2.8
15-24	23.9
25-34	36.2
35-44	16.8
45-54	11.4
55-64	7.0
65 and above	1.8





# INTEREST AND AWARENESS

There is no doubt that football remains the most followed sport in the world.

In 2018, survey data from Nielsen's *World Football Report* on 18 markets across the Americas, Europe, the Middle East and Asia showed football's unrivalled place as the No.1 sport, with 40% or more of respondents either "interested" or "very interested" in the beautiful game.

According to Repucom's *2014 World Football* report, nearly half of the world's population are interested in football, with Africa holding the most engaged fanbase (over three quarters of the continent's population is said to be interested in football).

In 2019, 66% of respondents in our Ghana Premier League Report survey indicated interest in football.

So how do the figures look in 2020?

# Interest in Football

Seventy four (74) per cent of respondents in ASC’s 2020 Ghana Premier League Report survey indicated a positive interest in football, representing an 8% rise from 2019. With the Ghana Football Association (GFA) launching a national campaign dubbed “Bring back the love” to whip up interest in the sport over the last year following a turbulent bribery and corruption scandal in 2018, the resumption of the Premier League in December 2019 after a one-year break, and a general football rebranding exercise in full gear over the last year, the rise in interest level was not surprising.

Of the respondents interested in football, 80% were males while 20% were females.

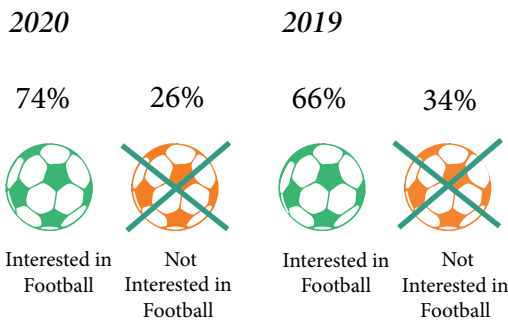
The Ashanti Region contributed the most to the group interested in football with a percentage of 20.6 more than closest contributor Greater Accra, while

the Eastern Region ranked third with 12%. While the Ashanti and Greater Accra regions maintained their places as Ghana’s football fandom hubs, the Eastern Region has jumped up by two places to third on the ranking. The Savannah Region, meanwhile, ranked the least (1%). Asante Kotoko - the most successful team in the history of the Premier League and the most followed domestic club - are likely to have contributed to the high interest level in the Ashanti Region.

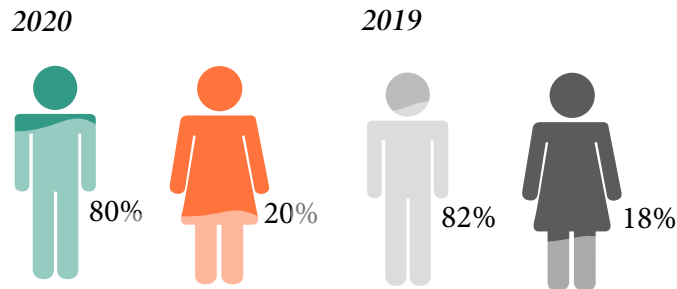
Millennials (40%), aged 25-34, also contribute the most to the group interested in football, followed by the 15-24 age Generation Z group (25%).

Respondents who expressed interested in football were asked to rate their level of interest in the sport from 1 (lowest) to 10 (highest). The most chosen interest level was 8 (19%) and 10 (19%).

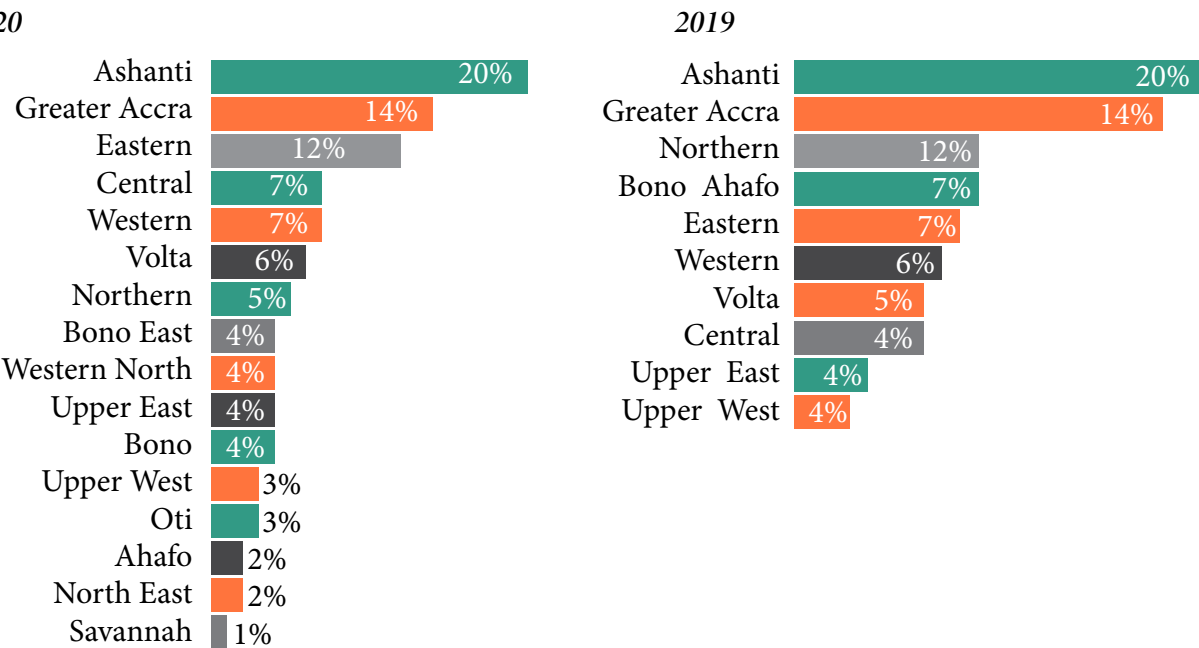
## Football interest level of respondents



## Contribution of each sex to people interested in football



*Regional distribution of people interested in football*



Ghana’s new 16 administrative regions used in 2020 while the old order of 10 regions was used in 2019.



Inter Allies’ Joel Aso is challenged for the ball by his Karela United opponent

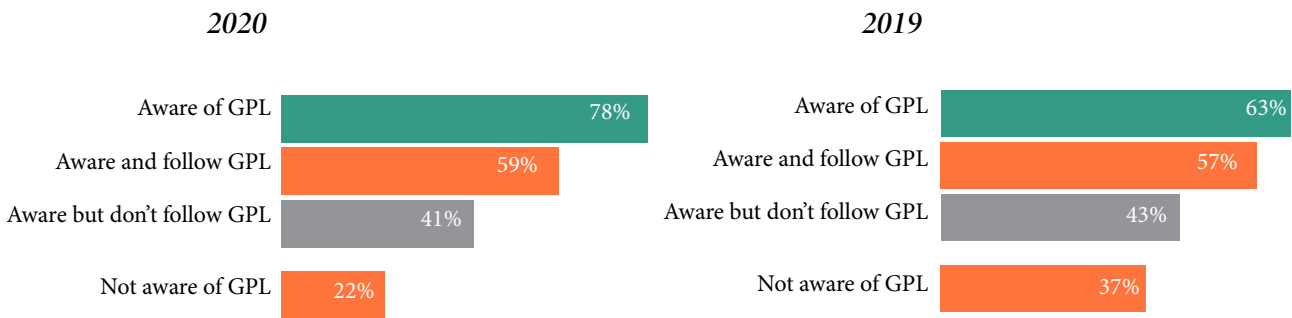
**Awareness and  
followership of GPL**

There was a rise from 2019’s 63% to 78% in 2020 in fans who indicated that they knew of the Ghana Premier League. The 15% increment could be explained by the general concerted effort to “bring back the football love” as well as marketing and promotional activities by the GFA and its Premier League Management Committee to increase awareness and patronage of the championship. Individual club efforts by the likes of Legon Cities, Asante Kotoko and Hearts of Oak cannot go unmentioned.

Seventy six (76) percent of respondents who were aware of the Premier League were males, with the

Ashanti (21%), Greater Accra (17%) and Eastern (11%) regions contributing the most to this figure. The least contribution came from the North East Region (1%).

While the rise in awareness of the GPL is significant, the increase in followership of the league was relatively small as 59% of our 2020 survey respondents follow the league (57% in 2019).





# Fans' Picks

## Teams' fanbase

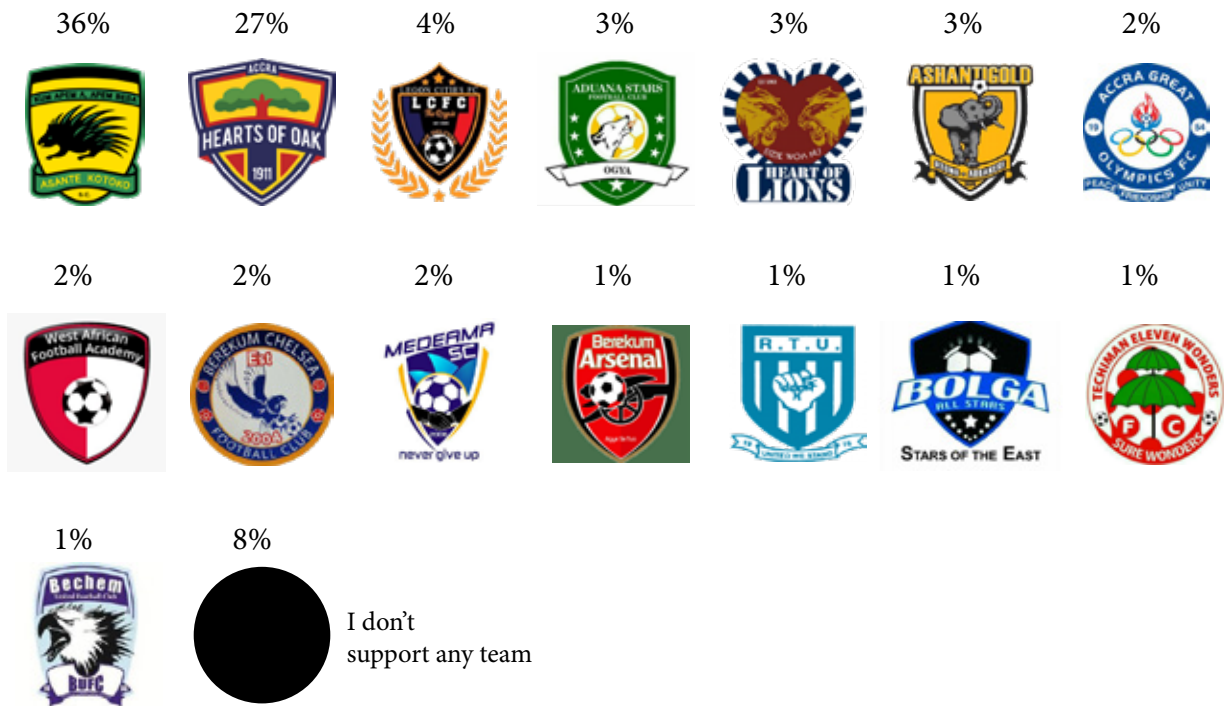
Respondents who indicated a positive interest in football were asked to state which teams they supported as ASC sought a deeper understanding of club football fandom in Ghana. For this question, any football club at all in Ghana, irrespective of its football division, could be selected. Also, respondents were allowed to choose as many clubs as they wanted.

Asante Kotoko emerged as the club with the biggest fanbase, with 36% of respondents indicating support for the side. Arch-rivals Hearts of Oak, unsurprisingly, came second with 27%. Significant, though, was the rank of Legon Cities who placed third (4%), beating Aduana Stars (3%). Former Premier League clubs Heart of Lions and Real Tamale United (RTU) placed

5th and 12th with 3% and 1% respectively, above Eleven Wonders, Bechem United, Elmina Sharks, Dreams FC and Karela United, Liberty Professionals, King Faisal and Inter Allies, who all currently play in the topflight.

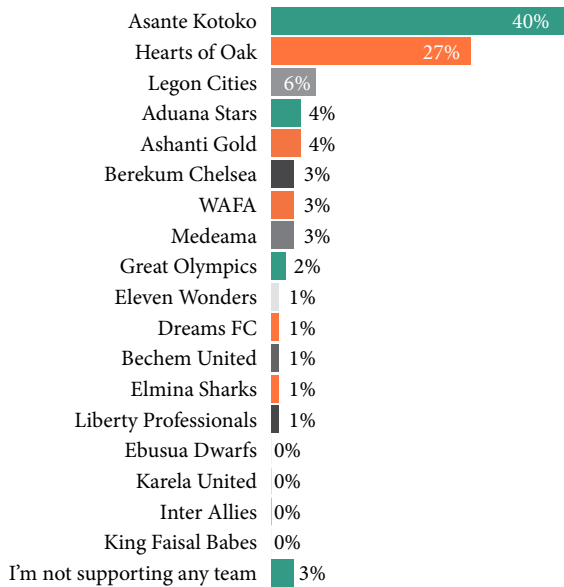
We subsequently narrowed down the team support question to only the 18 2020-2021 Ghana Premier League clubs. Still, Kotoko topped at this level with 40% (41% in 2019), followed by Hearts of Oak 27% (27% in 2019). Legon Cities (6%) still sat above Aduana Stars (4%) at this section.

### Which football club in Ghana do you support?

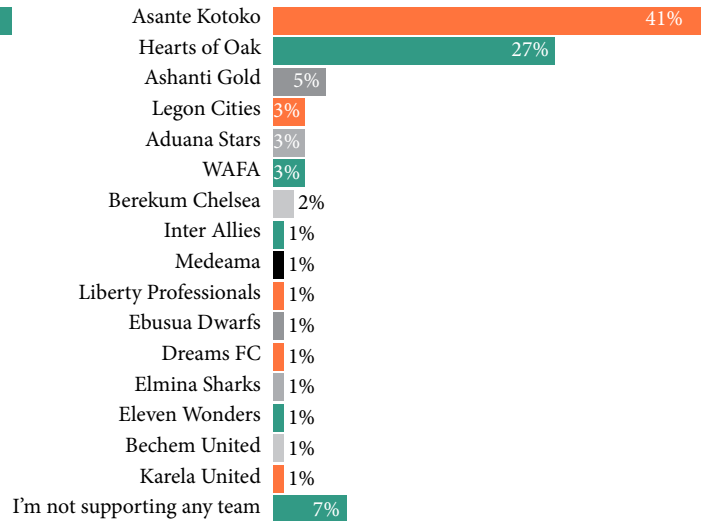


## Which team are you supporting in the Ghana Premier League in the coming 2020-2021 season?

2020

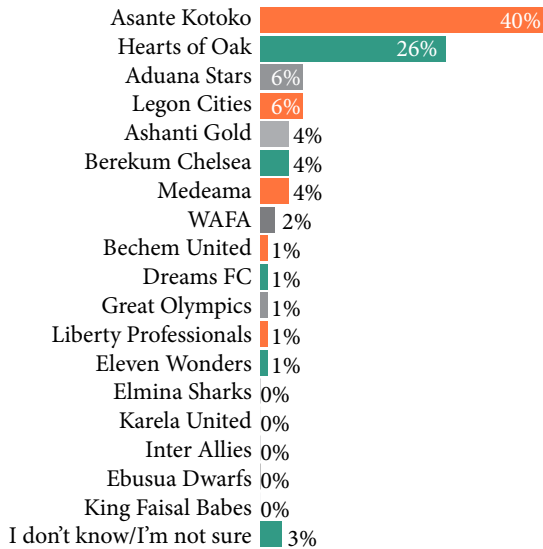


2019

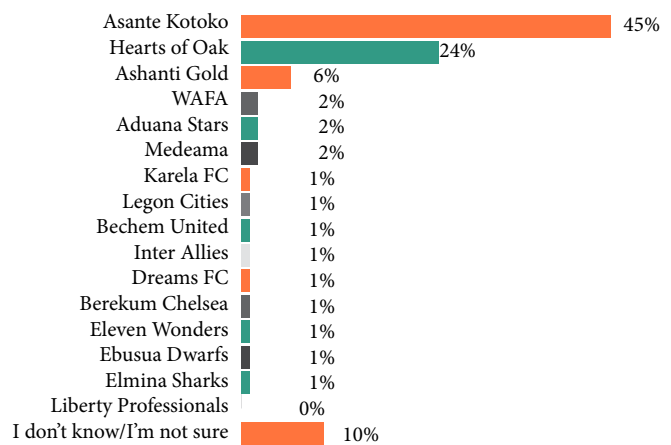


## Which team do you think will win the Ghana Premier League in the coming 2020-2021 season?

2020

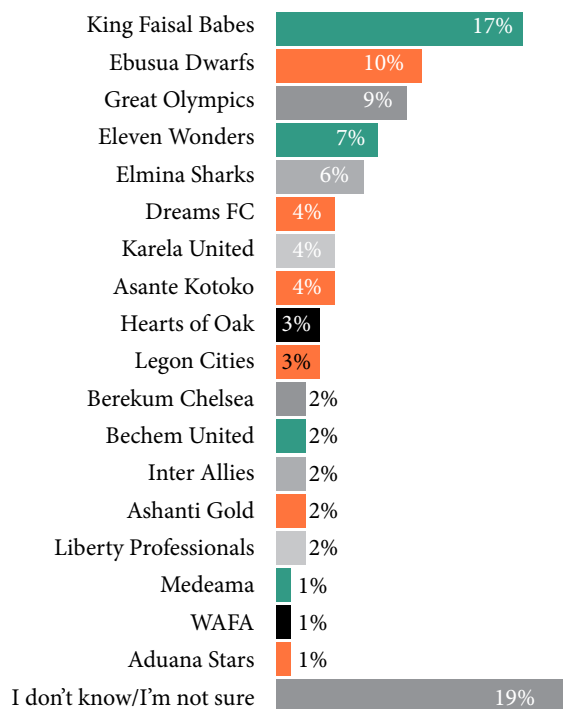


2019

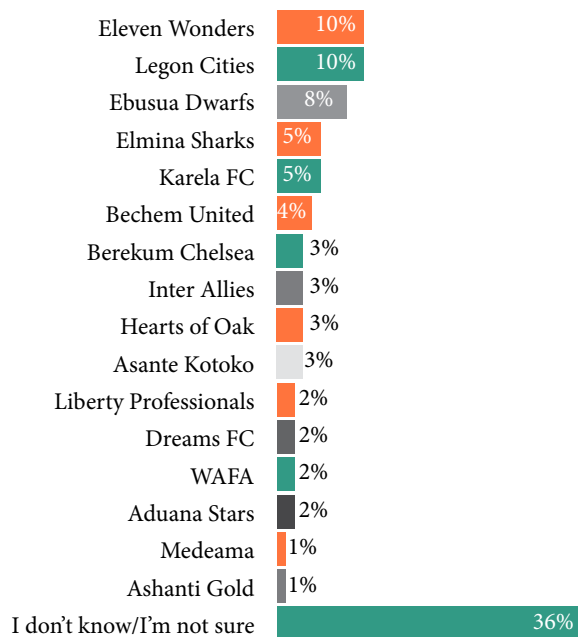


***Which team do you think will be relegated from the Ghana Premier League in the coming 2020-2021 season?***

**2020**



**2019**



*Which current player in the Ghana Premier League (GPL) would you pick as the most attractive player in the championship? “Attractive” is defined as the one player that is mostly likely to draw/pull you to watch a GPL game or follow the GPL.*



Asamoah Gyan



Justice Blay



Felix Annan



Yahaya Mohammed



Patrick Razak



Fabio Gama Dos Santos



Emmanuel Gyamfi



Others combined



Asamoah Gyan  
in action for Legon  
Cities



# PATRONAGE & CONSUMPTION



While a high interest level indicates a good possible consumer base, it may not necessarily translate into sales, patronage or consumption.

Matchday revenue (including ticket and corporate hospitality sales), broadcast rights and commercial sources (e.g. sponsorship, merchandising, stadium tours and other commercial operations) have been the top revenue sources for clubs in recent times. The extent to which each of these sources is beneficial to a property is different from one club/league to the other based on distinguishing factors such as pedigree, appeal, competitiveness, performance, and fanbase.

In Europe, for example, while the elite clubs source most of their revenue from commercial avenues, smaller clubs tend to rely more on broadcast rights. This was evident in the 2020 edition of the *Deloitte Football Money League*.

While the fine details of the European situation may not necessarily be the same in the African context, and for that matter Ghana, a lot of useful parallels can still be drawn, especially as Europe continues to blaze the trail of modern football professionalism and commercial success.

In our survey, ASC probed into fan behaviour, preferences and patterns/forms of engagements to understand the levels of patronage and consumption of Ghana's flagship football league and possible best revenue opportunities.

## Preference: Ghana Premier League vs European Leagues

While the GFA continues its effort to make the GPL the most watched football league in Ghana, one of its major challenges has been competition from foreign leagues.

We asked respondents about their viewing preference on a typical matchday. Refreshingly for the GPL, 56% of fans said they would prefer to watch a match in the domestic topflight to watching a match of any of the European leagues. Almost one-quarter (24%) of respondents chose the European leagues over the GPL while 20% were undecided.

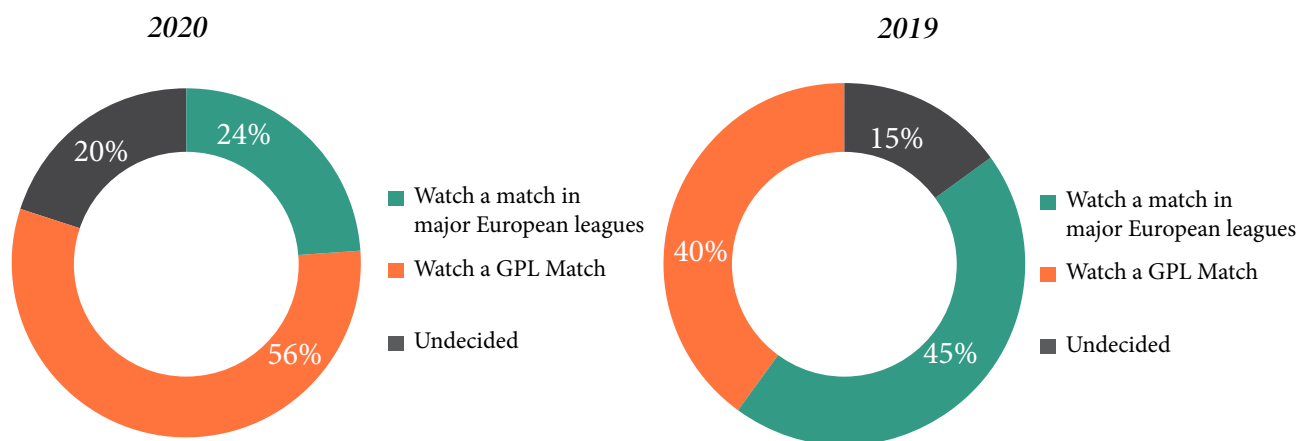
The positive viewing preference for the GPL in 2020 is a significant deviation from 2019 where less than half of our respondents (45%) chose the European leagues, 40% preferred the GPL while 15% were undecided.

It is important to note that the viewing figures above only represent respondents' ideal preferences and not actual current practice.

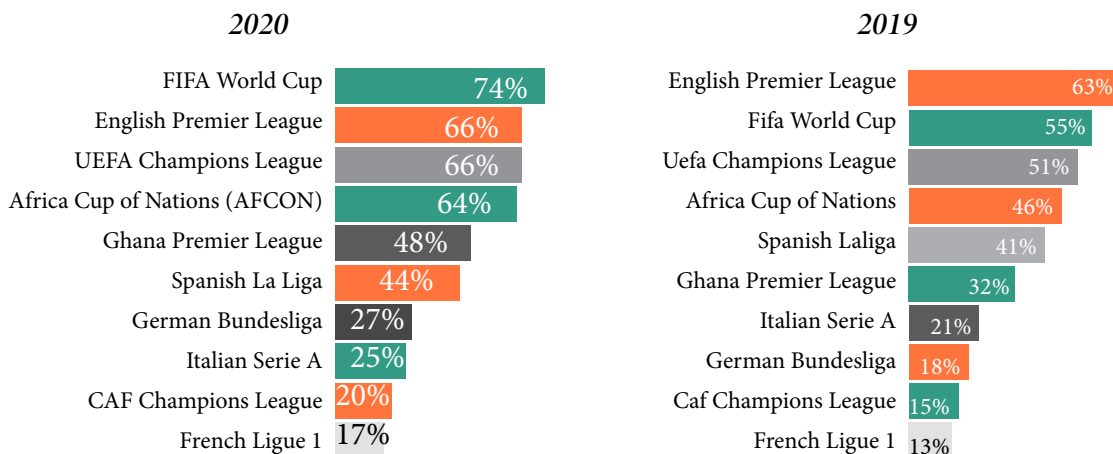
Indeed, despite the positive preference, respondents, in practice, followed the European leagues more than the GPL over the same period. Our survey revealed the GPL ranks as the fifth most followed football competition in Ghana, behind the English Premier League but moving up by one place above the Spanish La Liga. Also significant is the GPL's percentage rise from 32 in 2019 to 48 in 2020. While the FIFA World Cup has overtaken the English Premier League at the top – probably due to increasing popularity as Qatar 2022 approaches - the Uefa Champions League and Africa Cup of Nations (AFCON) maintain their third and fourth places.

Despite the change in positions for some, all the top 10 football competitions increased their following percentages from last season.

*On a typical matchday, will you prefer to watch a match in the Ghana Premier League to watching a match of any of the European leagues?*



## Mostly followed football competitions in Ghana based on behaviour of survey respondents



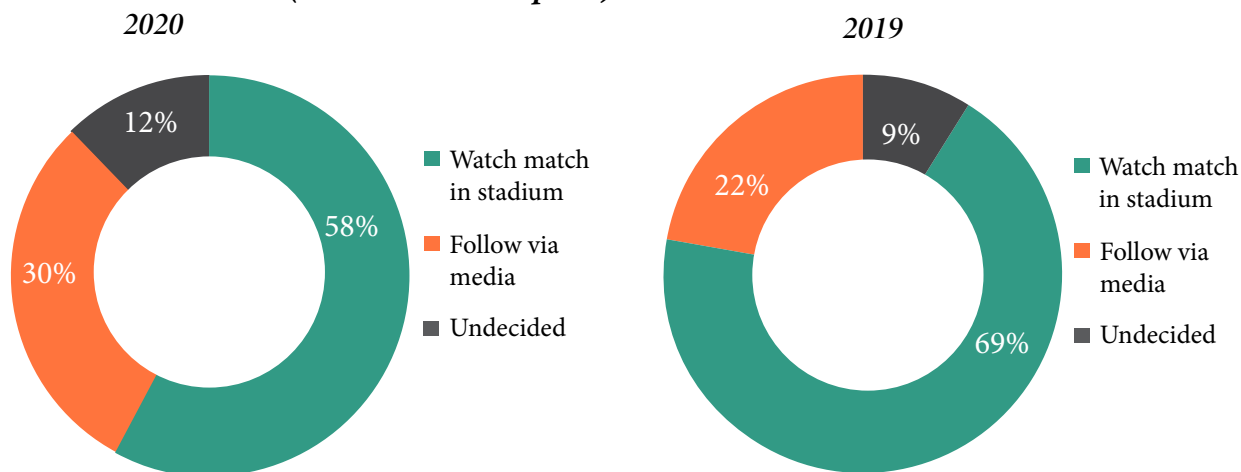
## Preference: Watching at stadium vs Following via media

When asked about their consumption preferences on watching a Ghana Premier League match live at the stadium as opposed to following a game via media coverage (TV, radio, online, print) on a typical match day, respondents indicated a higher attraction to stadium attendance (58%) although it is worth

stating this figure has dropped by 11% from 2019. Following via media sources, on the other hand, increased from 22% in 2019 to 30% in 2020, similar to the undecided group which increased from 9% in 2019 to 12% in 2020.

These findings are particularly relevant considering the present safety concerns around travel and match attendance due to the Covid-19 pandemic.

## Will you prefer to visit a stadium to watch a Ghana Premier League match or rather follow the match via the media (radio/TV/online/print)?



## TV Coverage

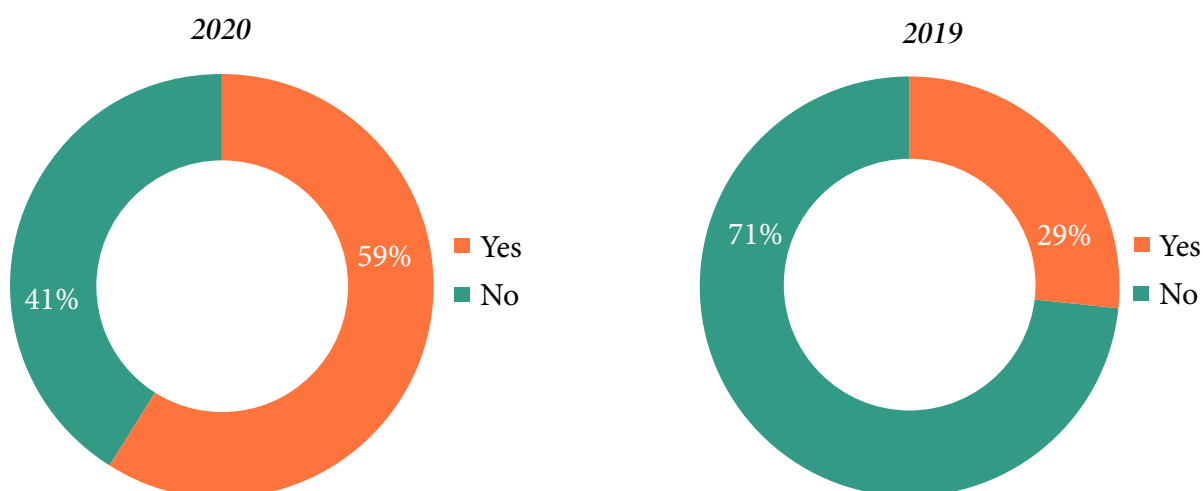
When asked whether they knew the Ghana Premier League would be broadcast live on TV in the 2020-2021 season, 59% of respondents responded in the affirmative, representing a staggering 30% rise from 2019. Also, nearly three-quarter (74%) of respondents who claimed that they knew matches would be broadcast live on TV revealed knowing the precise television channel which would be broadcasting the matches. ASC, however, did not dig deeper to ask about which TV channels/platforms respondents had in mind.

The stark difference in TV broadcast knowledge between 2019 and 2020 was not surprising as right holders StarTimes and local TV partners Max TV have heavily invested in promotions and advertising over the last year. At the time of the 2019 survey, there was a huge cloud of uncertainty regarding StarTimes' continuous hold of the broadcast rights following the coming into office of a new GFA administration. This may have heavily impacted advertising and promotional activities of the league. Also, a short

time period between confirmation of the start date of the 2019-2020 season and the actual kick-off day provided little time for advertising and promotional campaigns. This short time interval also likely heavily impacted several other findings in last year's survey.

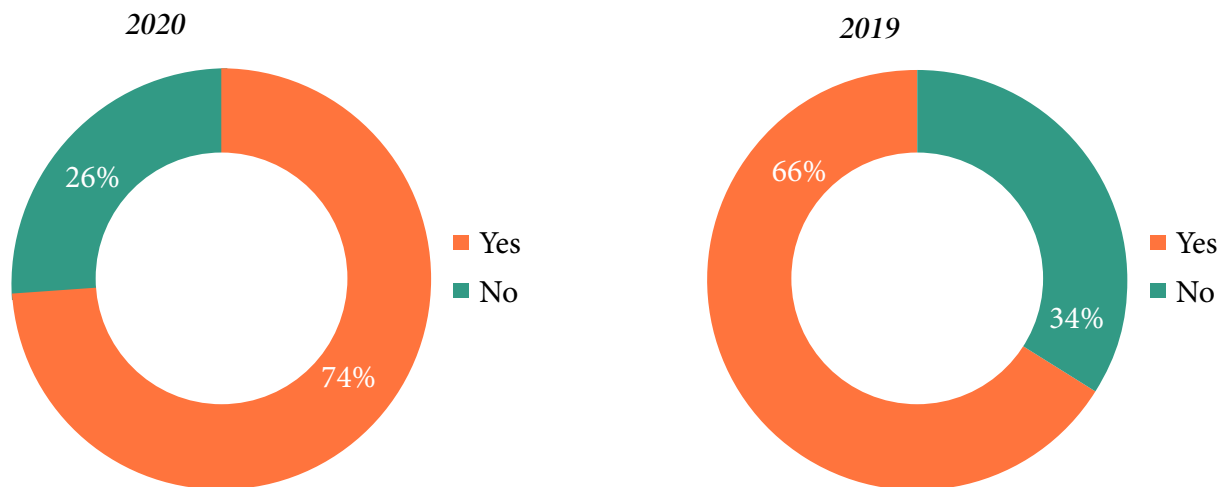
Interestingly, there seem to have been a change of mind regarding respondents' willingness to subscribe to Pay TV. This year, majority of respondents (52%) said they "will subscribe to a Pay TV to get access to watch matches in the Ghana Premier League". Thirty two (32) per cent responded negatively to the question while 17% were undecided. Fair to say people in Ghana are increasingly coming to terms with Pay TV as a means of following their favourite leagues, considering only 38% responded in the affirmative in 2019. With the ever increasing presence of DSTV and StarTimes in Ghana, an expected rise in patronage was expected.

### *Do you know if Ghana Premier League matches will be broadcast live on TV in the coming 2019-2020 season?*





## Do you know which TV station/outfit will be broadcasting the Ghana Premier League matches in the coming season?



### Online Streaming

The Covid-19 pandemic has resulted in an increase of people online as individuals, amid lockdown, isolation and quarantine restrictions, find ways to keep abreast of happenings and latest developments around the world. The online space has also provided people with an opportunity to engage with friends and family from whom they may be physically separated due to coronavirus-related barriers.

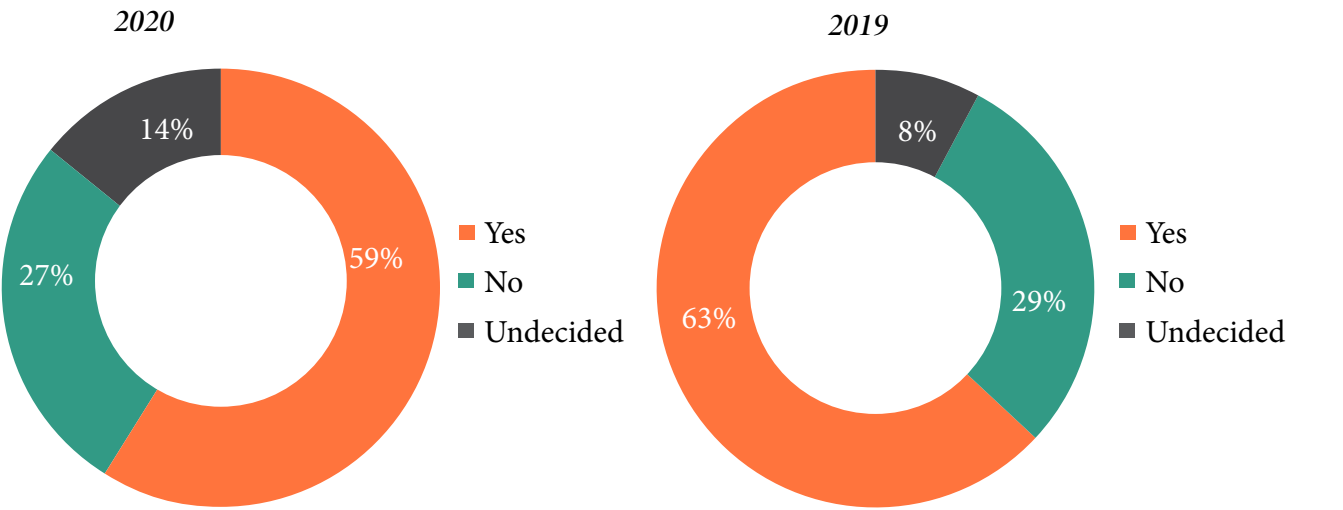
For some, meanwhile, online platforms provide a chance to keep abreast of their various celebrities, football leagues, clubs and stars, etc., while others find it a safe place to kill their boredom. For another group, it is a convenient way of accessing content on demand, a good news to the Over-The Top (OTT)/streaming industry. For Ghana Premier League fans, online access is of utmost importance as matches continue to be played behind closed doors as part of coronavirus safety protocols.

According to the 2020 *Digital Report*, there are 14.76

million internet users in Ghana, a figure increased by increased by 1.0 million (+7.5%) from 2019, while internet penetration stands at 48%, 12% more than the rate for Western Africa.

When asked whether they would consider watching a Ghana Premier League match online via live stream if the option were available, 59% of respondents positively, 27% responded negatively while 14% were undecided. Interestingly, however, the 59% positive group represents a 4% drop from 2019, a finding that could partly be attributed to the rising internet cost in the country.

*Will you consider watching a Ghana Premier League match online via live stream if the option were available?*



**Social Media**

As more people gather online, social media remains among the most used platforms as Twitter, Facebook, WhatsApp, Snapchat, Instagram and lately TikTok stay popular in Ghana’s online community.

The *2020 Digital Report* pegs Ghana’s social media users at 6 million and penetration at 20% (7% more than the rate of Western Africa), with WhatsApp, Facebook, YouTube, Instagram, Facebook Messenger, Twitter, Snapchat, Pinterest, TikTok and LinkedIn, in that order, making up the top 10 most used platforms.

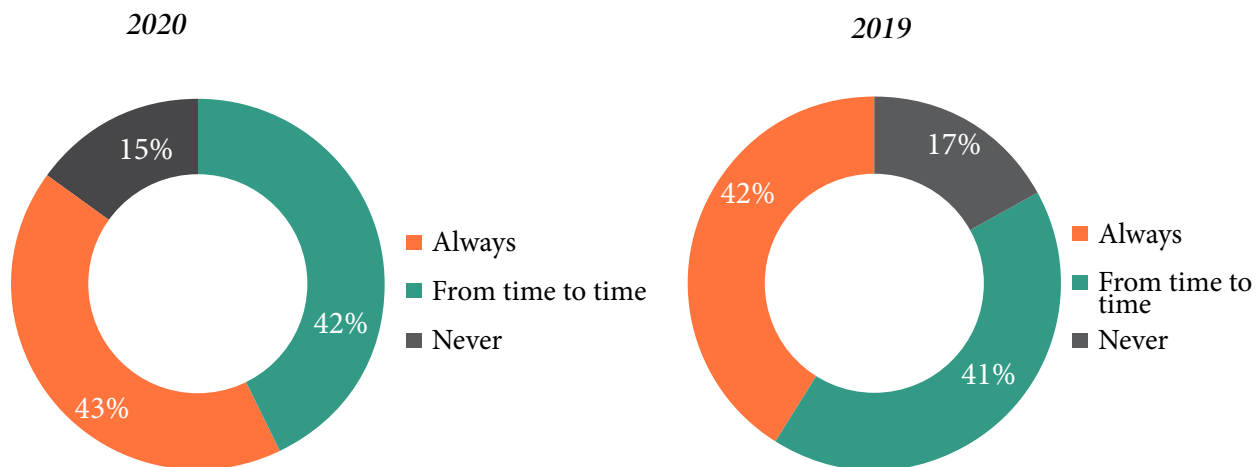
Asked about their online social activity, 43% of respondents indicated they “always” use social media to follow news/events/happenings in the Ghana Premier League, 42% said they do “from time to time” while 15% said the “never” use social media as a means. These figures are only slightly different from

the findings of 2019.

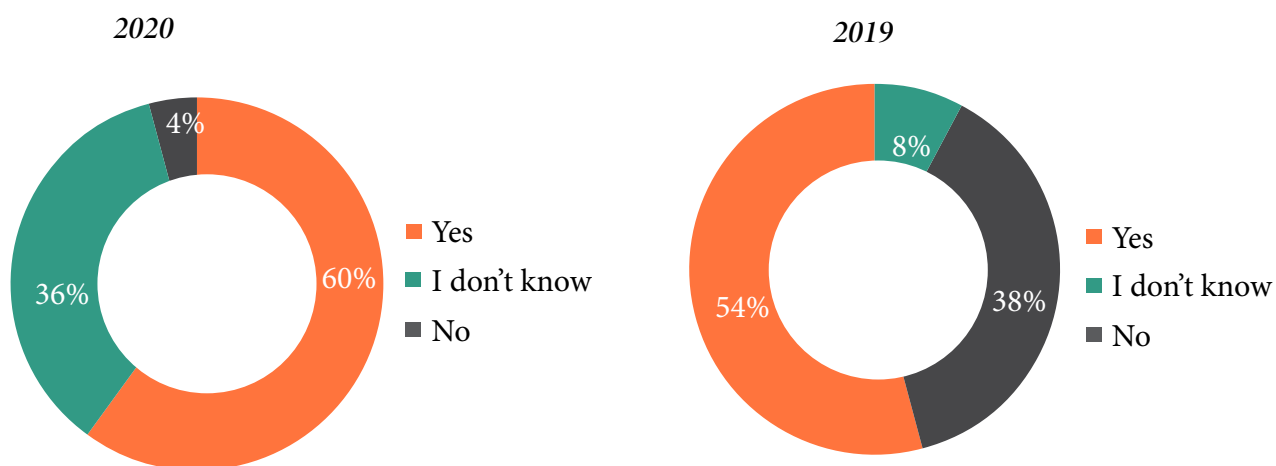
We delved deeper into whether fans knew their favourite clubs had social media platforms and about their satisfaction with the level of activity and/or content on these platforms. Over half (60%) of our respondents gave a positive reply when asked whether they knew their favourite clubs had social media platforms, 36% said they did not know and 4% claimed their favourite clubs did not have social media accounts.

Seventeen (17) per cent of fans said they were not happy with the level of activity and/or content on their favourite club’s social media platform. For the ‘happy fans’ group, however, Asante Kotoko (46%), Hearts of Oak (27%) and Legon Cites (6%) contributed mostly.

*How often do you use social media to follow news/events/happenings in the Ghana Premier League?*



*Does your favourite club have a social media platform?*

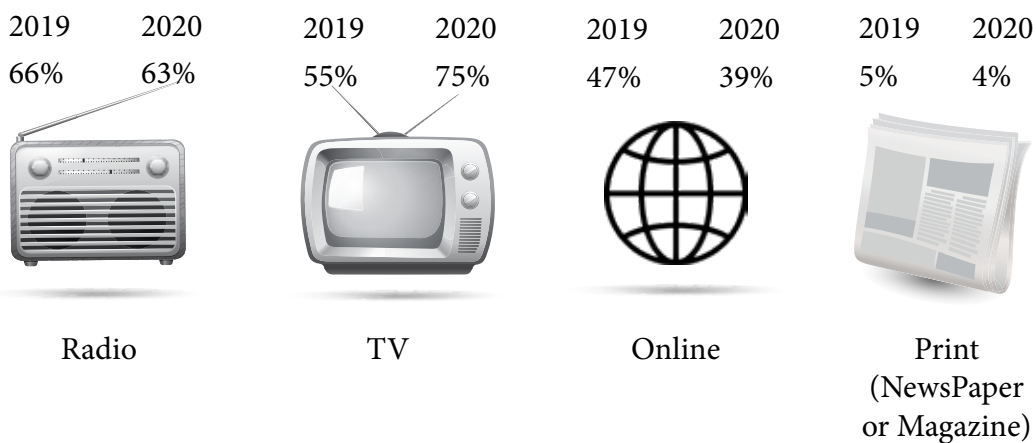




Emmanuel Ocran (left) of Dreams FC and Patrick Razak (right) of Hearts of Oak battle for the ball.

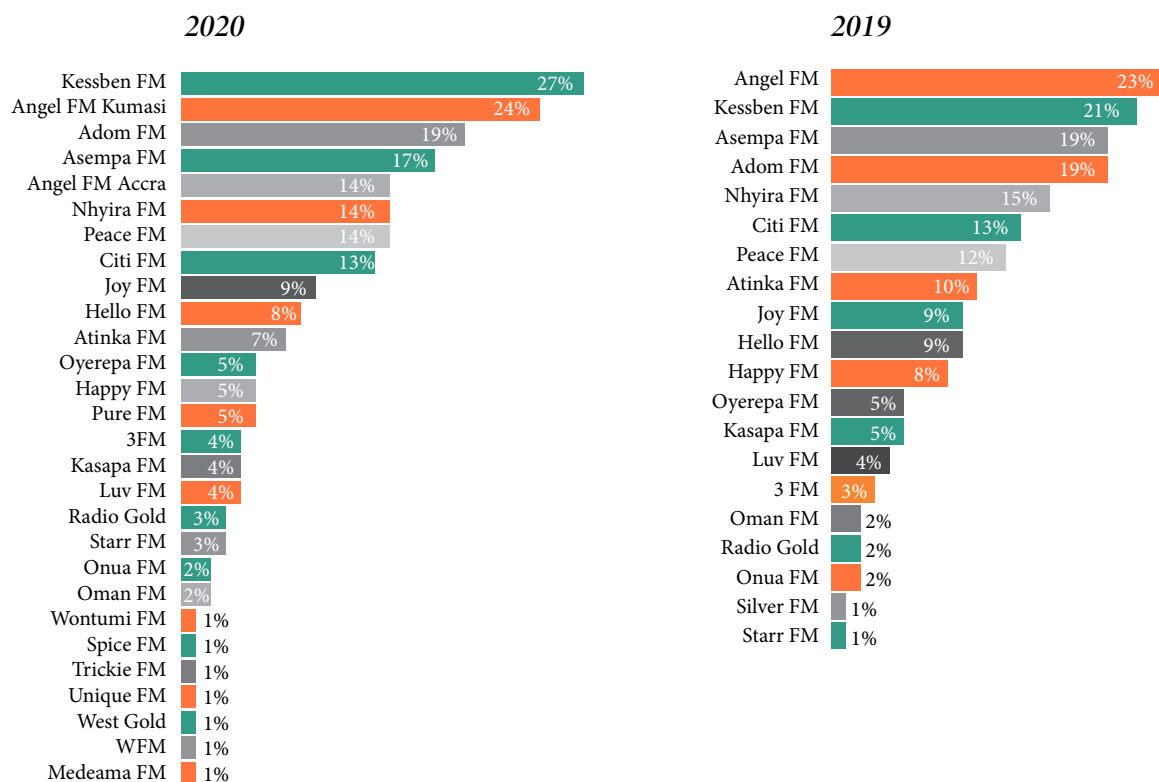
### *Consumer behaviour of respondents: TV vs Radio vs Online vs Print*

(What are your main media sources for following (or for news on) the Ghana Premier League?)



## Ranking of radio sources based on behaviour of survey respondents

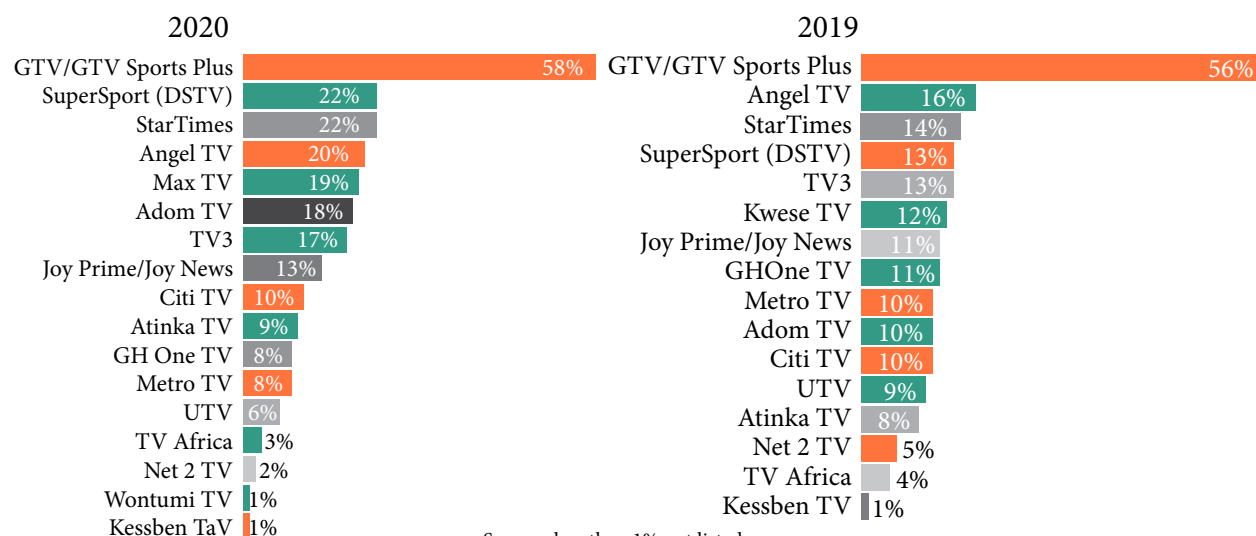
(Which radio station(s) do you mostly follow the Ghana Premier League by?)



Sources less than 1% not listed.

## Ranking of TV sources based on behaviour of survey respondents

(Which TV station(s) do you mostly follow the Ghana Premier League by?)

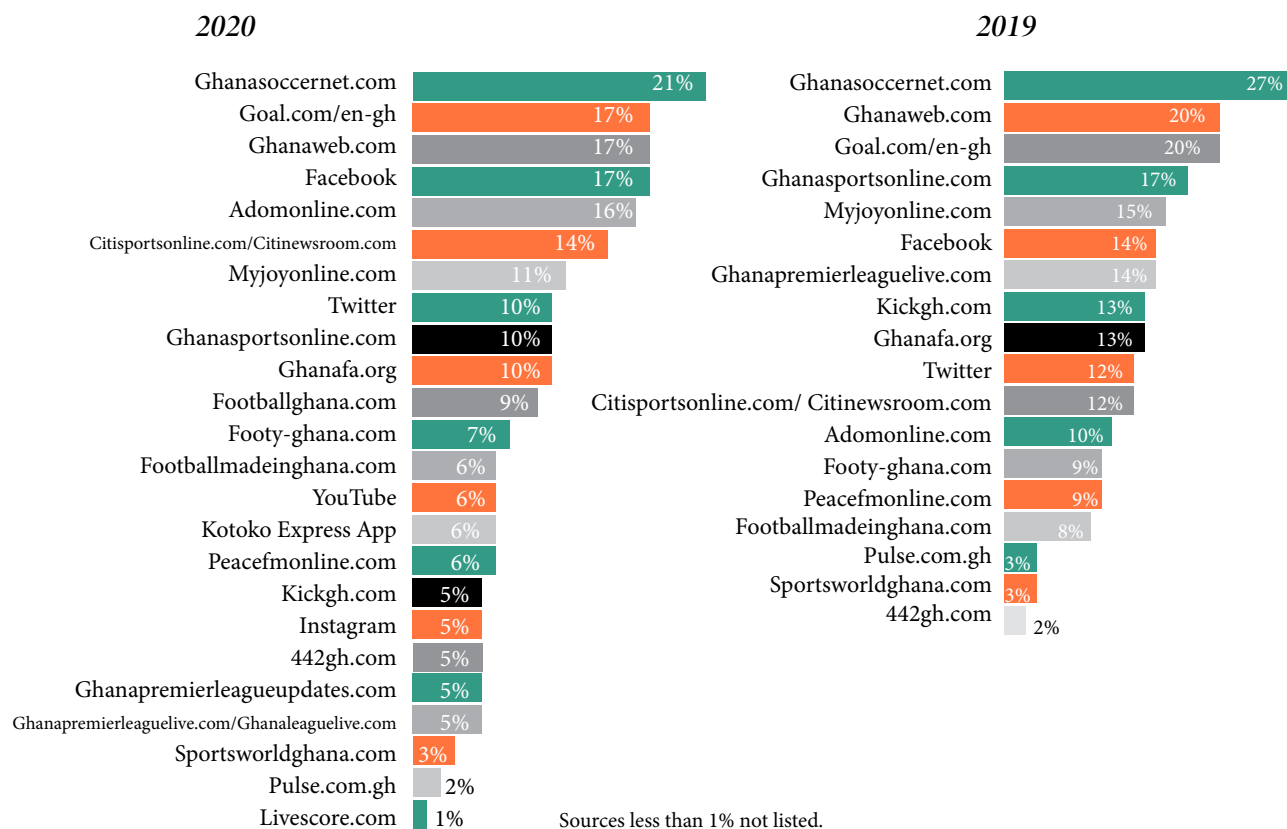


Sources less than 1% not listed.



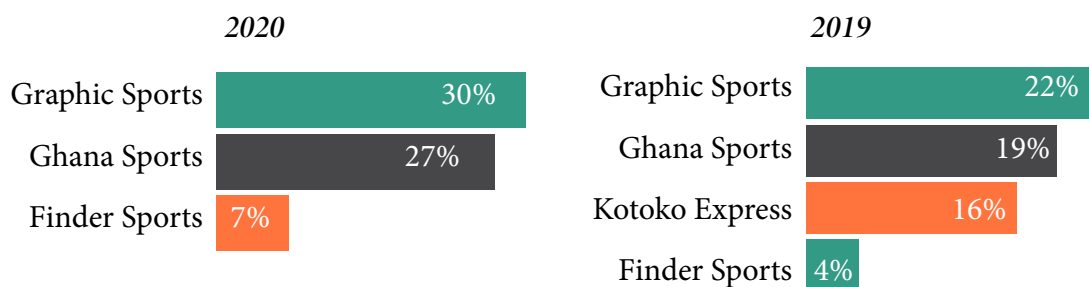
## Ranking of online sources based on behaviour of survey respondents

(Which online portal(s) (websites or mobile application (apps)) do you mostly follow the Ghana Premier League by?)



## Ranking of print sources based on behaviour of survey respondents

(Which print media (newspaper or magazine) do you mostly follow the Ghana Premier League by?)



**Table 3.** Ghana Premier League clubs, size of their Facebook following, size of Twitter following and total of Facebook and Twitter following

(Data collected on the eve of 2020-2021 GPL season kick-off)

Club	Facebook followers	Twitter followers	Total followers
Asante Kotoko	142K	361K	503K
Hearts of Oak	148K	311K	459K
Inter Allies	43K	63K	106K
Dreams FC	54K	43K	97K
WAFA	39K	52K	91K
Berekum Chelsea	42K	36K	78K
Legon Cities	13K	61K	74K
Ashanti Gold	35K	34K	69K
Liberty Professionals	24K	36K	60K
Medeama	8K	50K	58K
Elmina Sharks	22K	33K	55K
Ebusua Dwarfs	4K	34K	38K
Aduana Stars	11K	19K	30K
Great Olympics	7K	22K	29K
Karela United	10K	15K	25K
Bechem United	1K	16K	17K
Eleven Wonders	4K	11K	15K
King Faisal	7K	1K	8K

Following numbers as at 13th November 2020.

**Table 4.** Ghana Premier League clubs Twitter following at the start of 2019-2020 season, end of 2019-2020 season, new followers and growth rate

Club	Following Number at Season Start	Following Number at Season End	New Followers	Growth Rate
Asante Kotoko	190K	300.8K	110.8K	58%
Hearts of Oak	151K	259.8K	108.8K	72%
Legon Cities	19.3K	53.3K	34K	177%
Inter Allies	38.5K	57.4K	18.9K	49%
Medeama	30.6K	45.1K	14.5K	48%
Great Olympics	5K	18.6K	13.6K	274%
Liberty Professionals	21.1K	33.4K	12.3K	59%
Ashanti Gold	17.9K	30.2K	12.3K	69%
WAFA	36.6K	48.4K	11.8K	32%
Dreams FC	28.2K	39.3K	11.1K	40%
Berekum Chelsea	23.8K	34.3K	10.5K	44%
Ebusua Dwarfs	22.3K	31.9K	9.6K	43%
Elmina Sharks	21.7K	31.1K	9.4K	43%
Karela United	6.9K	12.5K	5.6K	82%
Aduana Stars	11.8K	16.7K	4.9K	42%
Eleven Wonders	5.1K	9.7K	4.6K	91%
Bechem United	13.6K	14.8K	1.2K	9%
King Faisal	345	1.2K	878	254%

# COMMERCE

Sponsorship, merchandising, stadium tours and other commercial operations have helped clubs broaden their revenue base, moving away from traditional sources like prize money, matchday sales and transfers.

Juventus' reported sale of 500,000 Cristiano Ronaldo jerseys in the 2018-2020 season upon the Portugal star's acquisition from Real Madrid and Liverpool's new five-year £150 million (\$200m) deal (£30m a year) with Nike have obviously generated a lot of talk about the profitability of kit licensing deals.

According to *Sponsorglobe* by Nielsen Sports, the betting/lottery industry ranked as the fifth highest investor in jersey sponsorships in the top six European leagues between 2008 and 2017.

In the 2019-2020 Ghana Premier League last season, 5 of 11 main shirt sponsors among the 18 clubs at the start of the season were betting companies. This 2020-2021 term, 4 of 9 main jersey sponsors of the 18 Ghana Premier League clubs fall under the betting industry.

With the apparent possible revenue opportunities for clubs in jersey sales and the obvious contribution of the betting industry to the domestic league, we asked our respondents questions concerning their jersey and betting behaviour and preferences.



betway

Jersey: patronage and appeal

Asked whether they have ever owned a jersey of a Ghana Premier League club, 47% of fans responded in the affirmative, 49% responded negatively while 4% said they ‘did not know’ or ‘could not remember’ whether they have ever owned a jersey or not. The affirmative response represents an 8% increment from 2019.

Of the group that responded having ever owned a jersey, almost three-quarter (73%) said they bought the jerseys, 29% claimed they were gifted the jerseys while 6% revealed the jerseys they owned were inherited.

Also, of the ‘ever owned jersey’ group, 87% were men, 45% owned Asante Kotoko jerseys while 26% owned Hearts of Oak jerseys.

Of the respondents that bought their own jerseys, only 9% were female. Again, Asante Kotoko (45%)

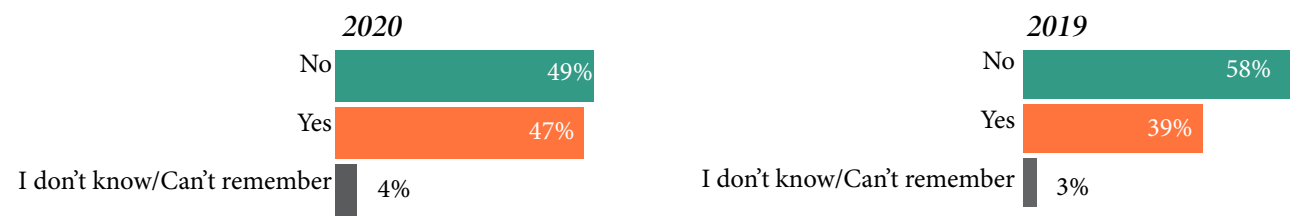
and Hearts of Oak (26%) contributed mostly to the ‘bought’ respondents.

With Hearts of Oak and Asante Kotoko contributing 67% of the Ghana Premier League support base, ASC sought to find out if opportunities existed for the other 16 elite division clubs to bite into the fanbase of the big two in jersey sales.

Sixty-eight (68) per cent of our respondents said they were open to buying a jersey of a team they did not support, possibly for aesthetic reasons. This response indicates a 20% rise from 2019. Twenty-five (25) per cent of respondents, though, were not willing to purchase a jersey of a team they did not support, while a further 7% were undecided.

We also asked respondents if they were open to buying a jersey of a Ghana Premier League club in the future, to which 78% responded in the affirmative, 11% said ‘no’ while a further 11% were undecided.

Have you ever owned a jersey of any Ghana Premier League team?



How did you get ownership of the jersey(s)?





*Will you ever buy a jersey of a Ghana Premier League club?*



*For one reason or the other (e.g. because of beauty), will you ever buy a jersey of a team you do not support?*



Joseph Adjei of Legon Cities challenges his Great Olympics opponent for the ball



Betting

Betting platforms Betway.com.gh (8th) and Sportybet.com (19th) rank among the top 20 most visited websites (according to average monthly traffic) in Ghana by Amazon’s Alexa (December 2020).

With betting becoming increasingly popular in Ghana, especially among the youth, ASC delved into the phenomenon.

Sixty-four (64%) of the respondents said they do not engage in betting, an 11% reduction from the previous year. Thirty-three (33) per cent said they engage in

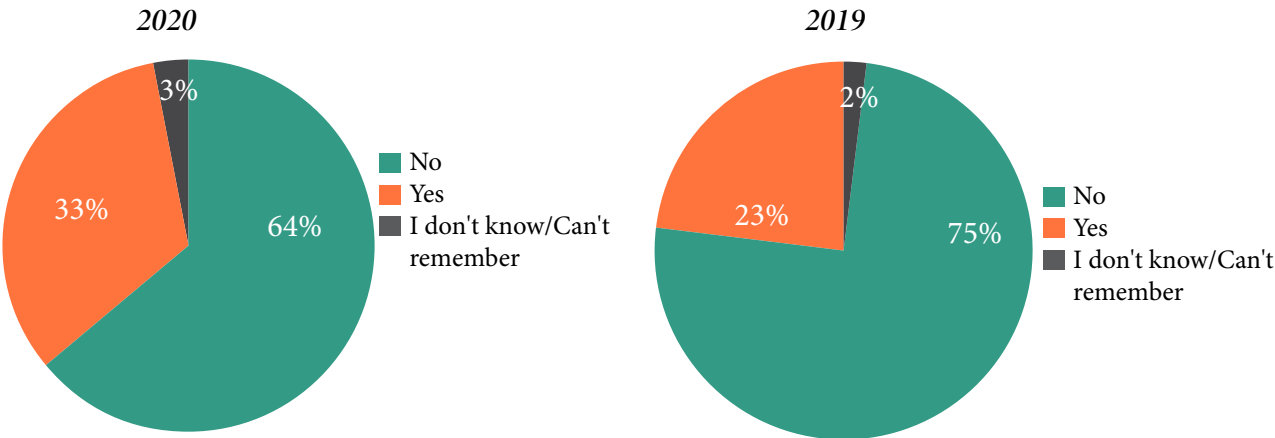
betting while 3% were unsure if they had ever bet.

The Ashanti (24%), Greater Accra (15%) and Volta (14%) regions contributed most to the 64% of respondents who indicated betting on Ghana Premier League matches.

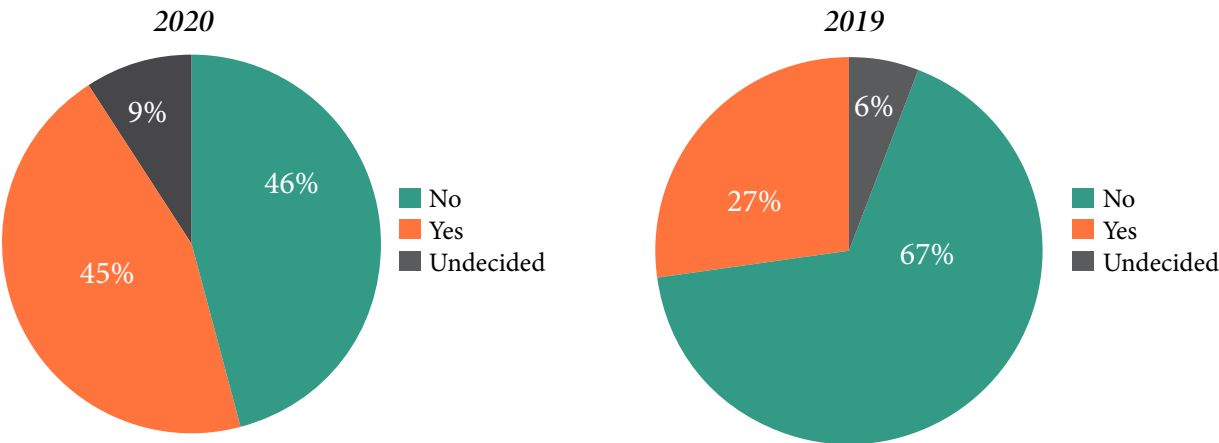
We also asked respondents whether they would bet or were open to betting on (a match or matches of) the Ghana Premier League in the future.

To this, 46% of respondents said “no”, 45% said “yes” while 9% were undecided.

Do you bet or have you ever bet on (a match or matches of) the Ghana Premier League?



Will you bet or are you open to betting on (a match or matches of) the Ghana Premier League in the future?



**Table 5.** Some Ghana Premier League clubs, their kit provider/manufacturer, main shirt sponsor and other major sponsors/partners

Team	Kit Provider/ Manufacturer	Main shirt sponsor	Other Major Sponsors/Partners
Aduana Stars	Mayniak Sports	betway	Ronor Motors, Next Level Energy Drink
Asante Kotoko	Errea	Hisense	Veo, InStat, CedarVite, Ceek, StarLife Assurance, Star Assurance, Next Level Energy Drink
Ashanti Gold	iGimel	betway	-
Bechem United	-	-	Top Kings Group, Nana's Rice, Next African Football Star, Walter's Technology
Berekum Chelsea	Laurus	-	Obolo Soap, Locust, S.O Frimpong Transport, Sultan Drinks
Dreams FC	Mayniak Sports	Mybet.africa	Ezzy paints, M.Vision, Gold's Gym
Ebusua Dwarfs	Pokoo	-	Bole
Eleven Wonders	-	-	-
Elmina Sharks	-	-	Groupe Nduom
Great Olympics	-	-	-
Hearts of Oak	Umbro	-	Beyond the Pitch, SAS, Goil, Star Assurance, StarLife, Koflex Gym, Bitsweaver, Cloud, GTV Sports Plus, Next Level Energy Drink
Inter Allies	Cappeli Sport	Tampico	Sub Box
Karela United	Strike	GNPC	Ghana Gas
King Faisal	iGimel	-	-
Legon Cities	-	Lemla Petroleum	Gulf Energy
Liberty Professionals	iGimel	betway	-
Medeama	Pokoo	Gold Fields	Mospacka
WFAA	-	-	-

\*Club partners and sponsor data not necessarily exhaustive. A dash (-) in Table 3 means no such entity exists or that information was not available to ASC.



# CONCLUSION AND WAY FORWARD

Fans remain central to football, not only in the atmosphere they provide for enjoyment of the beautiful game but also for commercial operations and revenue generation of football properties such as clubs and leagues.

With proliferation of smartphones and other digital devices, improved internet connectivity and rising popularity of social media, fan engagement and consumption behavior have massively changed over the last decade.

The Covid-19 pandemic has also hugely impacted modern trends, creating opportunities and problems alike.

It is for these reason that properties need to stay on top of the fandom evolution trend, progressively identifying their fanbase, nurturing existing fanbase and undertaking campaigns to increase their fanbase.

## **Knowledge and understanding of fanbase is key**

To craft the best commercial and marketing campaigns, knowledge of one's fanbase is key. Not only is it important to identify the size of one's fanbase, but knowing who they are, what they are, how they currently engage with the property and how they will like to engage in the future is key.

There is also a need to segregate fans by their level of affinity to the property as football fanatics, club loyalists, icon imitators, FOMO (feeling of being left out) followers, main eventers and tagalongs all engage with the sport in uniquely different ways, each providing separate revenue opportunities requiring varying forms of content and marketing. Consumption and engagement forms are also known to vary with generations (e.g. Gen X, millennials, Gen Z, etc.)

The 74% football interest level, 78% GPL awareness level and 59% GPL followership recorded in ASC's 2020 survey bodes well for the country's sport and league. It was also evident that Asante Kotoko and Hearts of Oak, who hold a combined 67% of the GPL fanbase, boast of uniquely high possible revenue streams, but the steep rise of Legon Cities over the last years remains a good motivational case study for other 'smaller' clubs.

Following a new ownership takeover and a strong rebranding exercise that involved renaming of the club from Wa All Stars to Legon Cities FC, changing the club's home base to Accra, a change of crest, acquisition of marquee signing Fatau Dauda (Ghana's 2014 World Cup No.1 goalkeeper), enhancement of the matchday experience with musical performances

from some of Ghana's elite musicians and an active digital presence, particularly on social media, the club recorded a staggering rise (177%) in Twitter following over the course of last season to become the fourth most followed GPL club on the platform.

Ahead of start of the 2020-2021 term, the club signed legendary Ghana striker Asamoah Gyan, a move that may have impacted the club becoming the third most supported team in Ghana and in the GPL, per our survey respondents. It is also worth stating the club was also picked by respondents as the third-joint favourites to win the league while Gyan was overwhelmingly named as the most attractive player in the topflight. While the club's brand and appeal have obviously seen a major lift, their current struggles in transforming their off-pitch progress to on-pitch success remains a challenge. The Legon Cities story is proof that a club's fanbase and appeal can be transformed with good strategy.

For The Royals, and indeed all other GPL clubs, improving their fan stickiness and retention will be key to their long term growth.

## **Marquee signings can be helpful**

Asamoah Gyan's overwhelming position as the most attractive player in the GPL is a good indication of the power of marquee signings. Indeed, the striker garnered 52% of votes, with his closest challenger, Justice Blay, of Medeama polling 7%. Another remarkable placement on the order was Kotoko's own marquee signing, Fabio Gama Dos Santos, who placed sixth on the order. A largely unknown personality to football fans in Ghana at the time of his acquisition, his status as a Brazilian and a former national U17 and U20 star may have greatly factored into people's



perceptions of his abilities.

The practice of marquee signings is particularly important as some fans have more connection to individual players rather than clubs. While marquee signings have been heavily utilised in other African leagues, such as Egypt, South Africa, Morocco, Tunisia and Algeria, there has been little seen of that in the GPL in recent times.

### **Diversification of revenue streams**

A good knowledge about the various fan segments, including their level of affinity and engagement, helps to identify and explore new possible revenue

opportunities. Positive numbers recorded in GPL viewing preference (56%) over European leagues, live stream of matches (59%) and social media following of league (85%) are good indicators for diversification plans.

While clubs have traditionally relied on prize money, transfers, linear TV broadcast rights and match attendance as their main revenue sources in the past, there are new possibilities including OTT platforms and social media advertisement. The league can also explore fantasy football and betting as possible sources of revenue. Asante Kotoko's partnership with virtual events streaming platform CEEK VR certainly deserves commendation.

### **Improvement of digital experience**

A good digital engagement obviously increases consumer affinity, stickiness and retention. Knowledge of fans is key in this area as it helps to explore various digital opportunities such as linear TV, OTT platforms, social media, websites and mobile applications, and as well helps to feed followers with tailor-made content. Properties must strive to be content creators and curators. Content may include interviews, training and changing room footage, behind-the-scene photos, highlights and memes.

Again, a good digital engagement involves good timing of content release. It is important to state properties must not restrict themselves to putting out content on only match days or during game times. Inter Allies and Dreams FC are two good examples of GPL clubs known for their week-round content delivery. It was refreshing that 79% of our survey respondents indicated happiness with their favourite clubs' level of activity or content on social media, most of whom were Asante Kotoko (46%) and Hearts

Fatau Dauda



of Oak (27%) fans.

### **Enhancement of the matchday experience**

That 58% of respondents picked stadium attendance as their ideal match consumption preference over media coverage following shows that matchday revenue is still a strong cash source of properties. The figure recorded was even more significant considering the safety and health concerns over the coronavirus disease. Matchday experience can be improved by the availability of good access roads to the stadia, efficient ticketing systems, availability of food and beverage shops, gaming centres, provision of merchandising outlets, quality infrastructure and entertainment.

Last season, Legon Cities' matches saw performances from some of Ghana's A-list musicians such as Shatta Wale, Medikal and Kwesi Arthur, and it has been no surprise that the club's popularity among the youth has seen an astronomical rise. It is also important to add that the matchday experience goes beyond stadium activities to online and general digital engagement.

### **Solid Branding, management and general professionalism a good attraction**

Legon Cities' success has been heavily fuelled by a sense of professionalism and strong branding. Their significant fanbase growth is enough proof that people in Ghana are open to supporting new teams, provided a strong corporate and management practice is exhibited by clubs.



Hearts of Oak players celebrate



## About Us

**A**frican Sports Centre for Data, Research and Technology (also known as African Sports Centre or ASC) is an organisation committed to championing the use of scientific and technical methodologies and innovations for the development of sports, largely by data, research and technology (DR&T) in an integrated approach.

Our objectives also target four of the UN's 2030 Sustainable Development Goals (SDGs): Good Health and Well-being (SDG 3), Decent Work and Economic Growth (SDG 8), Industry, Innovation and Infrastructure (SDG 9), and Partnerships for the Goals (SDG 17).

Based in Accra, Ghana, and with a satellite office in Nigeria, ASC is devoted to increasing awareness and utilisation of sports DR&T in Africa and to providing related services. We are a one-stop centre of excellence for on or off-pitch data collection and management, performance, scouting, betting, health and safety, research, training and advocacy, events (seminars, workshops and conferences), consultancy, etc.

We coordinate and facilitate public, governmental, non-governmental and private sector initiatives in sports, provide relief for sports teams, and serve the needs of the commercial sector – all aimed at bridging the gap between the continent and the rest of the world and tackling inequalities.

Our services are targeted at sports teams, national and regional sports governing bodies and associations, regulatory agencies, NGOs, private businesses/corporate entities, and other sports DR&T companies. We are more than happy to partner, serve or help.

With training and advocacy among our top priorities, we seek to spread the message of the incredible opportunities available to sports outfits from the utilisation of DR&T, more so in these days of million-

dollar brand sponsorships, performance monitoring and analytics, media digitalisation, social media marketing and sports betting. It is our vision that sports teams in Africa, like those in other parts of the world, exploit DR&T for maximum benefits.

We aspire to lead the way in capacity-building, providing outfits with the technical know-how and resources to make the best use of DR&T. In the face of admittedly bigger responsibilities and priorities – like heavy debts of player salaries – we aim to provide teams with equally good but less costly options.

The games and industry have moved on from opinions, intuitions and theories to data, research and technology-driven decisions. For long, Africa has lagged behind. But the narrative has been on the change. And we, the ASC, are proud to lead the charge.



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