



SD 2014

supporters direct
scotland

NATIONAL FOOTBALL SURVEY

In association with





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THE
COLOURS
OF OUR
SCARVES

All photographs used in this document are courtesy of The Colours of Our Scarves project in association with Stuart Roy Clarke.



INTRODUCTION

Supporters Direct Scotland, in association with the Scottish Football Association, conducted the National Football Survey, a survey that offered fans a say on a range of issues affecting Scotland’s national game.

The survey aimed to engage supporters by gathering vital information on the game’s key consumers, its supporters. Topics such as the match day experience, national team performance, regulation and governance were all covered.

Some findings from the survey have been used within more focused research which made up a

book of papers from Supporters Direct Scotland.

You can find these online at www.scottishfans.org/research. The findings of these were published and promoted by media outlets including the Daily Record, FC Business, the Scotsman and were also discussed at First Minister’s questions.

METHODOLOGY

The survey was available to complete online between the 2nd and 27th of April. It was made available and distributed through the Supporters Direct Scotland database and shared across multiple social media platforms. Each Scottish

Professional Football League team was asked to share details of the survey on their website and via their respective Twitter and Facebook feeds. In total, 3,067 survey responses were gathered.

EXECUTIVE SUMMARY

Responses from the Supporters Direct Scotland 2014 National Football Survey produced some insightful findings.

The survey revealed that almost 62% of Scottish football fans were in favour of lifting the alcohol ban in Scottish football. A vast majority of participants (72.40%) were in favour of the introduction of a small scale trial.

Nearly 91% of participants were in favour of seeing safe-standing areas being introduced. Of those who don’t attend games regularly, almost half (48.79%) claimed they would be more likely to attend games if they had the choice to stand.

And as the momentum continues to build towards greater fan representation at the highest levels of the game, over 93% believe supporters should be represented in their club’s boardroom. Similarly, there is a strong belief that the fan ownership model can work in Scotland, with over 91% holding this opinion.

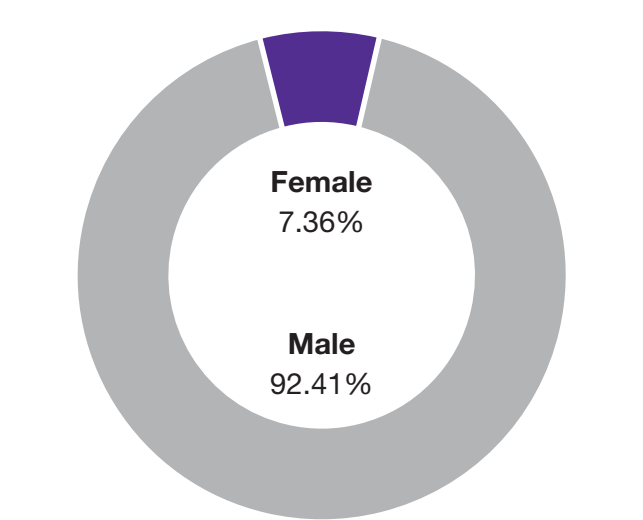
14% of participants were ‘very’ worried about the issue of match fixing, although 56% were either ‘not very’ worried or ‘not at all’ worried. 65% believed players should not be allowed to bet on matches.

The survey also showed that 61% believe a change of season to March to November would benefit the recreational game and 56.5% are confident that the National Team will qualify for Euro 2016.

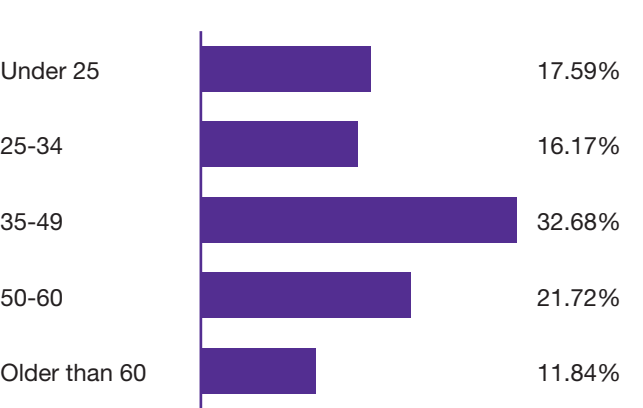
While participants were strongly of the opinion that Scottish football does not have a problem with racism or homophobia, 84% believed the game still has a problem with sectarianism.

SURVEY PARTICIPANT BACKGROUND

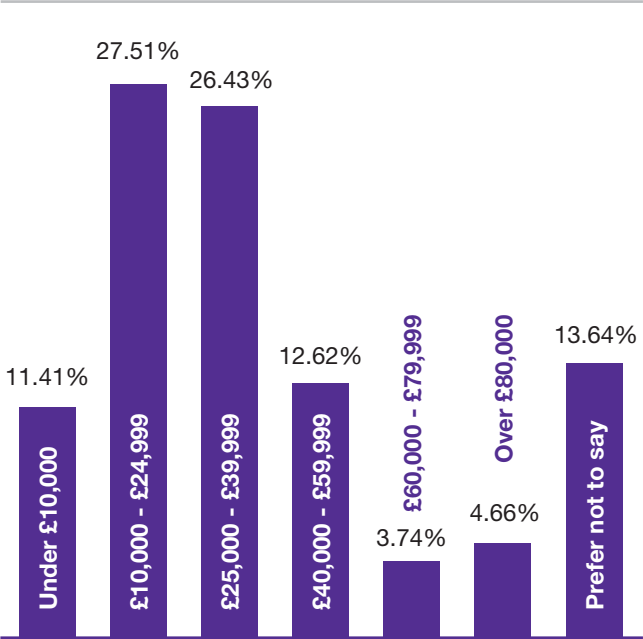
Gender



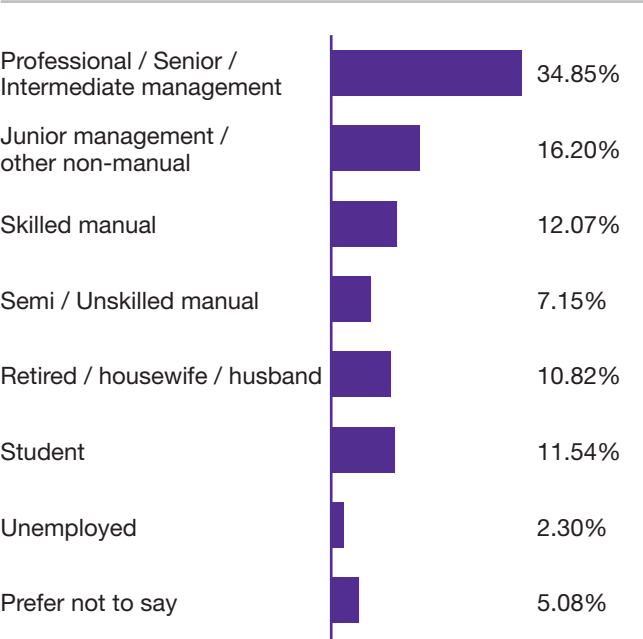
Age



Annual Income



Occupation

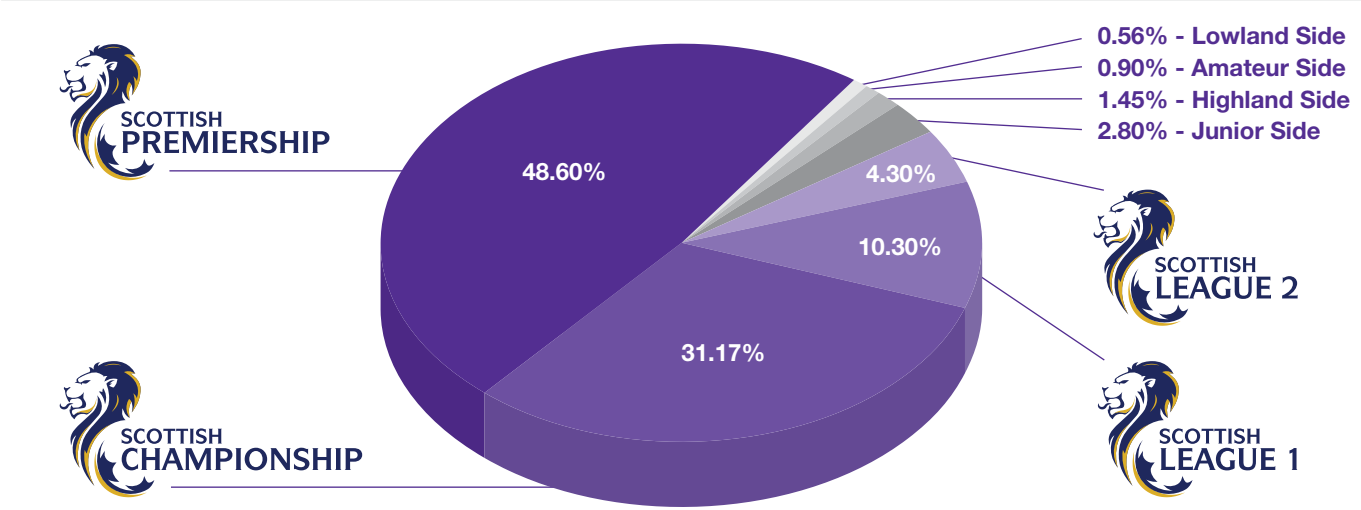


Location (by postcode)

| | |
|----------------------------|--------|
| AB (Aberdeen) | 9.33% |
| DD (Dundee) | 6.47% |
| DG (Dumfries and Galloway) | 1.48% |
| EH (Edinburgh) | 21.60% |
| FK (Falkirk) | 5.56% |
| G (Glasgow) | 21.5% |
| HS (Outer Hebrides) | 0.10% |
| IV (Inverness) | 2.49% |

| | |
|-----------------|-------|
| KA (Kilmarnock) | 5.46% |
| KW (Kirkwall) | 0.47% |
| KY (Kirkcaldy) | 8.39% |
| ML (Motherwell) | 7.35% |
| PA (Paisley) | 6.77% |
| PH (Perth) | 2.09% |
| TD (Galashiels) | 0.71% |
| ZE (Lerwick) | 0.24% |

Which club do you support?



| | |
|----------------------|--------|
| Aberdeen | 11.60% |
| Airdrieonians | 2.40% |
| Albion Rovers | 0.49% |
| Alloa Athletic | 0.36% |
| Annan Athletic | 0.23% |
| Arbroath | 0.26% |
| Ayr United | 2.10% |
| Berwick Rangers | 0.23% |
| Brechin City | 0.53% |
| Celtic | 18.04% |
| Clyde | 0.39% |
| Cowdenbeath | 1.35% |
| Dumbarton | 1.25% |
| Dundee | 1.58% |
| Dundee United | 5.65% |
| Dunfermline Athletic | 2.96% |
| East Fife | 1.25% |
| East Stirlingshire | 0.72% |
| Elgin City | 0.30% |
| Falkirk | 1.64% |
| Forfar Athletic | 1.08% |
| Greenock Morton | 0.89% |
| Hamilton Academical | 1.77% |

| | |
|------------------------------|--------|
| Heart of Midlothian | 15.77% |
| Hibernian | 3.68% |
| Inverness Caledonian Thistle | 1.02% |
| Kilmarnock | 1.61% |
| Livingston | 0.56% |
| Montrose | 0.39% |
| Motherwell | 2.37% |
| Partick Thistle | 5.19% |
| Peterhead | 0.33% |
| Queen of the South | 0.99% |
| Queen's Park | 0.72% |
| Raith Rovers | 1.41% |
| Rangers | 9.23% |
| Ross County | 0.89% |
| St. Johnstone | 1.31% |
| St. Mirren | 5.39% |
| Stenhousemuir | 0.30% |
| Stirling Albion | 1.15% |
| Stranraer | 0.20% |
| Junior side | 3.25% |
| Highland league side | 1.68% |
| Lowland league side | 0.56% |
| Amateur side | 1.05% |

SURVEY PARTICIPANT BACKGROUND

Involvement in football

| Involvement | Regularly | Sometimes | Seldom | Never | Don't know/ No Answer |
|---|-----------|-----------|--------|--------|--------------------------|
| Go to watch professional football matches | 71.30% | 21.05% | 6.80% | 0.66% | 0.20% |
| Attend youth football matches | 11.40% | 18.35% | 27.64% | 41.38% | 1.23% |
| Play 5/6 a-side | 20.38% | 14.97% | 16.63% | 45.77% | 2.25% |
| Attend amateur football matches | 3.41% | 12.61% | 25.29% | 56.32% | 2.37% |
| Attend junior football matches | 4.40% | 14.66% | 21.97% | 56.56% | 2.40% |
| Play in amateur football matches | 4.86% | 3.80% | 6.74% | 79.91% | 4.70% |
| Help with running of football clubs | 7.86% | 5.16% | 6.41% | 75.54% | 5.04% |
| Coach/manage adult football teams | 1.44% | 1.52% | 2.21% | 88.97% | 5.87% |
| Coach/manage youth football teams | 5.62% | 3.03% | 3.47% | 82.59% | 5.29% |
| Referee football matches | 1.32% | 1.94% | 2.52% | 88.31% | 5.91% |

Motivation to attend games

| | |
|--|--------|
| Back Room Factor: Any factor amenable to management control that contributes to the overall experience this includes parking and ease of getting a seat. | 14.25% |
| Emotional Arousal Factor: The arousal of spectator’s emotions includes variables such as whether the sports event was found to be astonishing or stirring. | 52.55% |
| True Fan Factor: Attendees for whom the enjoyment of the game itself is most important. They are interested in the competitive nature of the event, the process the outcomes and the performance of the team or individual that they support. | 86.11% |
| Front Room Factor: Facilities or elements of the event experience that are under the control of management, which include food and drink facilities and general cleanliness. | 12.42% |
| Social Factor: The Social Factor considers the importance of friends and family in the enjoyment of the event. | 56.61% |
| Alternative Options: Attendance being influenced by whether the game is to be broadcast on television and the success of the team. | 8.86% |

Which of the following groups would you describe yourself part of?

| | |
|--|--------|
| A ' Football Diehard ' who never misses a game (Attends all games in a season) | 12.50% |
| A ' Committed Regular ' who has a season ticket and attends regularly (Attends most games a season) | 52.22% |
| A ' Committed Occasional ' who attends games when possible (Attends 3-6 games a season) | 18.00% |
| A ' Historical Occasional ' who doesn't attend as much as they used to (Attends 1-2 games a season) | 5.03% |
| A ' Walk In ' who attends an occasional game (Attends 1-2 games a season) | 0.76% |
| A ' Distant Lover ' who follows the team but cannot attend for geographical reasons (Attends 1-2 games a season) | 5.23% |
| A ' Lapsed Lover ' who might go to Cup Finals or special events but doesn't attend as much as they used to (Attends 1-2 games a season) | 1.84% |
| An ' Armchair Fan ' who only watches games on TV (Does not attend games) | 1.28% |



PERCEPTIONS OF PERFORMANCE

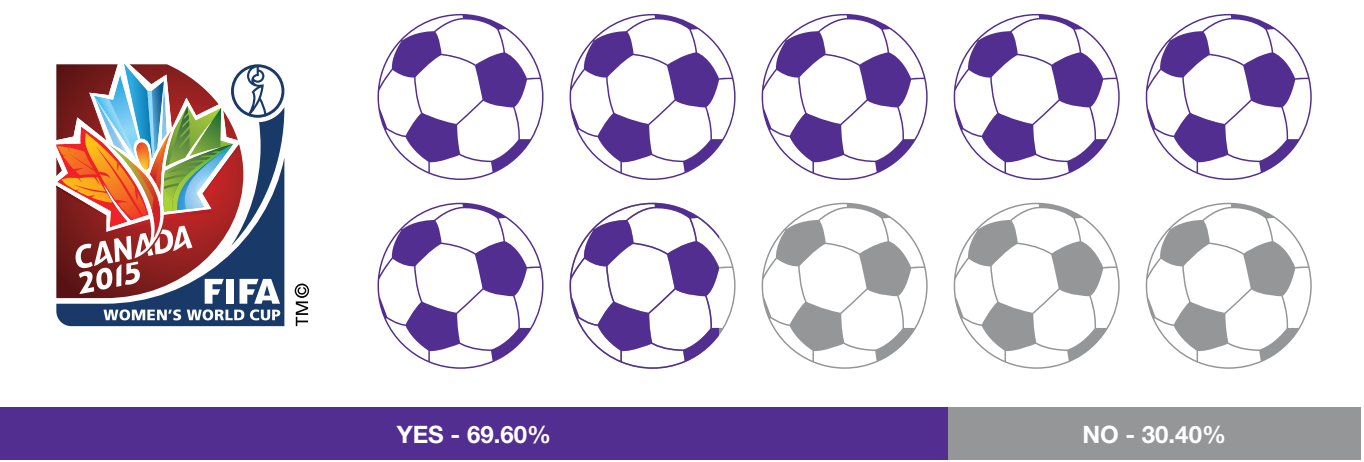
How do you rate the performance of the Scottish National teams and clubs?

| | Overachieve | Perform as expected | Underachieve | Seriously underachieve | Don't know |
|---------------------------------|-------------|---------------------|--------------|------------------------|------------|
| Scotland Men's National Team | 6.75% | 44.95% | 39.18% | 7.94% | 1.18% |
| Scotland Women's National Team | 24.30% | 35.06% | 2.58% | 0.62% | 37.44% |
| Scotland National Youth Teams | 19.86% | 45.25% | 11.73% | 1.14% | 22.02% |
| Scottish clubs in Europe | 3.17% | 27.95% | 40.05% | 27.88% | 0.95% |
| Scottish Womens clubs in Europe | 11.89% | 25.66% | 7.61% | 1.87% | 52.97% |

Will Scotland qualify for Euro 2016?



Will Scotland's Womens National Team qualify for 2015 WC?



Are you aware of the Regional Performance Schools model?



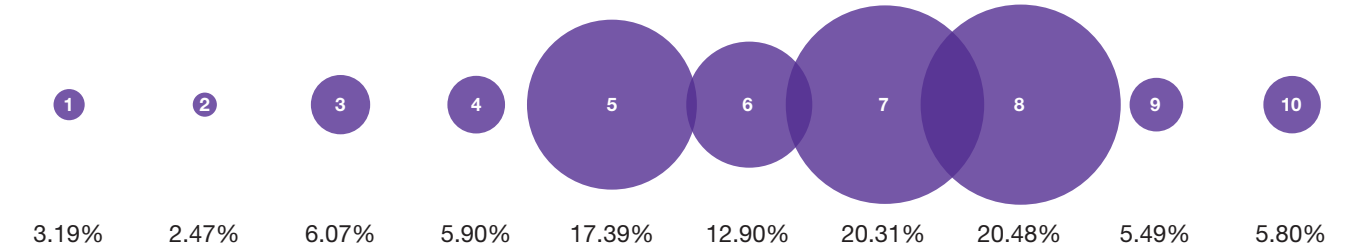
Do you agree with the principle of Regional Performance Schools and the fact that our talented young players are getting more quality practice time with specialist coaches?



Do you think the Regional Performance Schools model is a good one?



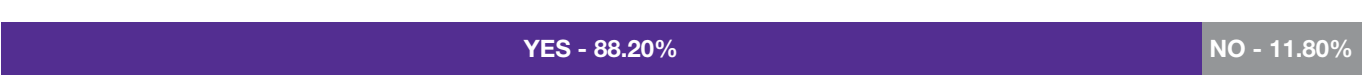
On a scale of 1 to 10, how would you rate the Under 20 League as a tool for developing young talented players where 1 is no value and 10 is excellent value?



Do you believe the Reserve League or the Under-20 League is the best format for talent development?



Are you happy with the introduction of the Lowland League and pyramid system?



PERCEPTIONS OF GRASSROOTS

Are you aware of One National Plan for the grassroots game?



What do you believe is most important factors in grassroots development?
(Ranked in importance with 1 being the most important)

| Factors | 1 | 2 | 3 | 4 | Average Rank |
|------------|--------|--------|--------|--------|--------------|
| Facilities | 40.80% | 34.35% | 16.23% | 8.62% | 3.07 |
| Coaches | 40.86% | 40.83% | 14.64% | 3.66% | 3.19 |
| Volunteers | 5.72% | 10.04% | 37.27% | 46.97% | 1.75 |
| Clubs | 12.79% | 14.95% | 31.96% | 40.29% | 2.00 |

Do you believe a change of season (March to November) would benefit the recreational game?



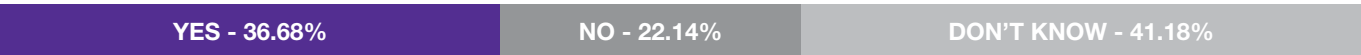


THE JUDICIAL PROCESS

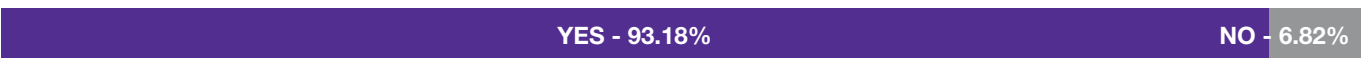
The Scottish FA is responsible for administering disciplinary procedures for its member clubs. This is essential in protecting the integrity and reputation of the game at all levels, while also providing guidelines of acceptable behaviour for clubs. As part of the SFA's new strategic plan, the disciplinary procedures were radically overhauled to provide greater efficiency, accountability and transparency.

OPINIONS OF GOVERNANCE

Do you believe the implementation of the McLeish Report recommendations will improve Scottish football?



Should fans be represented at club board level?



Can the fan/community ownership model work in Scotland?



Should clubs adopt a form of Financial Fair Play?



How would you rate the Scottish FA's implementation of McLeish recommendations?



Do you believe the Judicial Process is fairer?

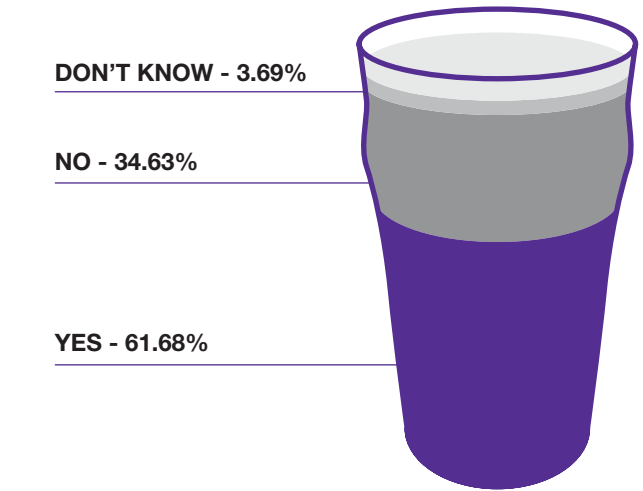


Do you believe the Judicial Process is more efficient?

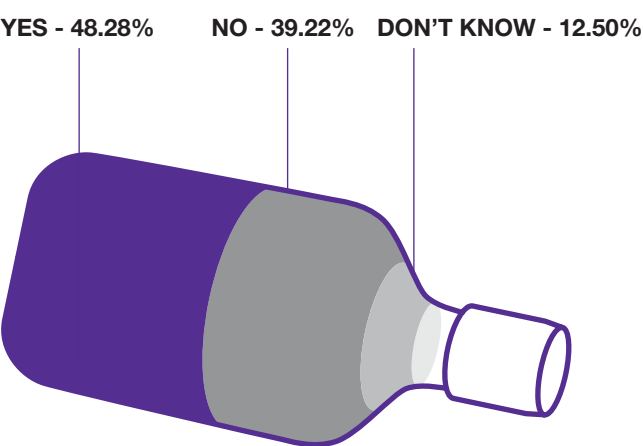


MATCH-DAY EXPERIENCE

Do you think the Alcohol Ban in Scottish football should be lifted?



Do you believe the Alcohol Ban has been successful in reducing crowd disorder and anti-social behaviour?



Would you be in favour of seeing a ‘small-scale trial’ of selling alcohol in Scottish football?



Would you be in favour of seeing an introduction of ‘safe-standing’ areas in Scottish football?



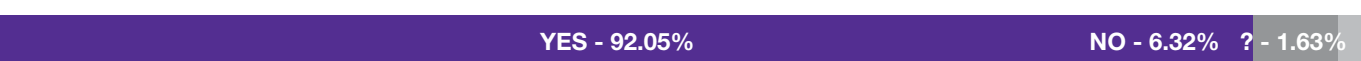
If you currently don’t attend games regularly, would you be more likely to attend games if you had the choice to stand?



Do you feel that safe-standing areas would improve the match-day atmosphere for football matches?



Would you be in favour of ‘small-scale trials’ of safe-standing areas in Scottish football?



FOOTBALL AND SOCIETY

Do you believe Scottish football has a problem with homophobia?



Do you believe Scottish football has a problem with racism?



Do you believe Scottish football has a problem with sectarianism?



Do you believe greater education of these issues is required?



For further information please contact:



Supporters Direct Scotland
Room 4 Beta House
Innovation Park
University of Stirling
Stirling
FK9 4NF

T: 01786 845 606
or connect with us via:

 facebook.com/scottishfans

 twitter.com/scottishfans