



NATIONAL FOOTBALL SURVEY



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Introduction

Repucom was appointed by the Scottish Football Association to conduct the National Football Survey, a study to give fans a say on the major issues affecting Scotland's national game.

The survey was a collaborative effort by the Scottish FA, Scottish Premier League (SPL), Scottish Football League (SFL) and Supporters Direct Scotland, with the aim to engage meaningful feedback from supporters.

Issues such as league reconstruction, national team performance, rules and regulations and the match day experience were all covered in the most comprehensive fan study ever carried out in Scottish football.

The online survey, independently administered and analysed by Repucom, aimed to facilitate a significant step forward in improving Scottish football. It addressed fans at all levels; from the avid supporter of the national team, and / or a particular club, to the armchair spectator.

Methodology

The survey was available online between November 30th 2012 - January 2nd 2013. Several web links were used for the survey, and it was distributed by all the collaborative partners, as well as SPL and SFL clubs. The links were distributed as follows:

- Through the Scottish FA website (image right)
- Through the SFL website
- Through SPL club links
- Through the SPL database
- Through the Supporters Direct Scotland database



The survey was reported and promoted by several media organisations, such as BBC Sport, Daily Record and The Scotsman. The total number of survey responses generated across all web links was 6,755.

Executive Summary

- Scottish football fans ultimately judge the Scottish Football Association by the performance of the national team. The team is widely regarded to be underachieving, and the Scottish FA will be perceived by supporters as performing well as an organisation, once Scotland qualifies for a major tournament.
- Scottish football supporters are overwhelmingly mindful of the recommendations of the Henry McLeish report but believe the Scottish FA and the game in general have more work to do to achieve all his required objectives.
- Scottish fans favour, in general, a larger top division but consider a single league body, fairer financial distribution and three-league senior set-up to be key elements of any reconstruction.
- Grassroots football is seen as a crucial element in the long-term development of football in Scotland. Fans feel this should be the top priority for any devised Scottish FA strategies, whilst increasing participation is seen as vital to improving the standards of football in Scotland.
- Fans deem a lack of facilities, competition from other leisure activities, and the cost to parents as potential barriers to the Scottish FA achieving their aim of increasing youth participation. Supporters believe the Scottish FA should be provided with governmental support, and that increased youth participation will ultimately lead to a more competitive national team.
- As the sport's governing body, the Scottish FA is seen as most responsible for improving football in Scotland, whilst fans encourage more communication between the organisation and established supporters groups.
- Fans in Scotland tend to support a team because they are a local club or they were encouraged to do so by parents or family.
- Scottish football fans have a very strong emotional connection with their clubs - for many, their club is part of their life, and part of family life.
- In terms of the match day experience, the game itself was the most important element to fans - they want entertaining football, with a good atmosphere, and a good standard of refereeing.

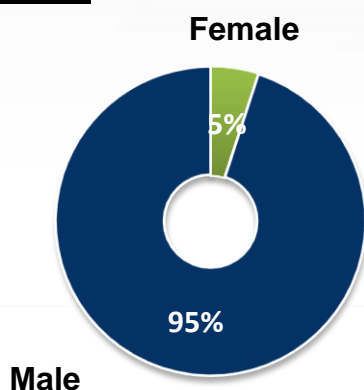


PROFILE OF SCOTTISH FOOTBALL FANS



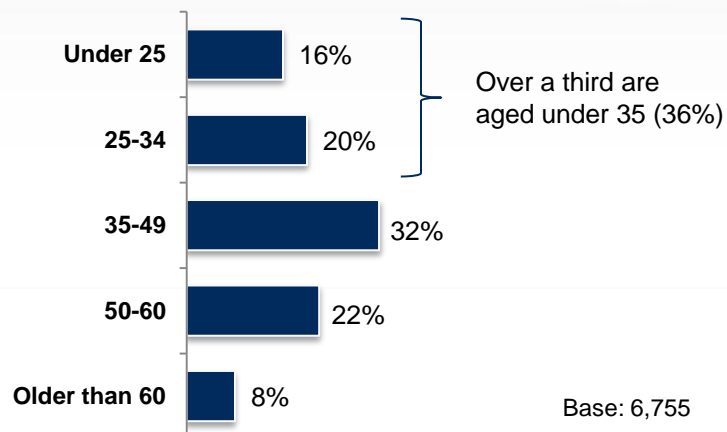
Profile of Scottish Football Fans Surveyed

Gender



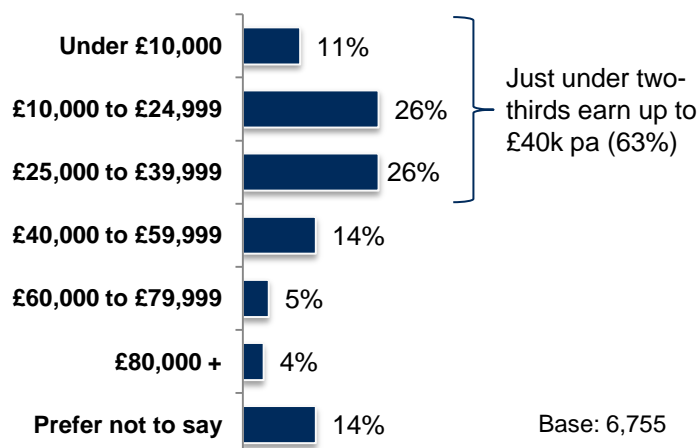
Base: 6,755

Age



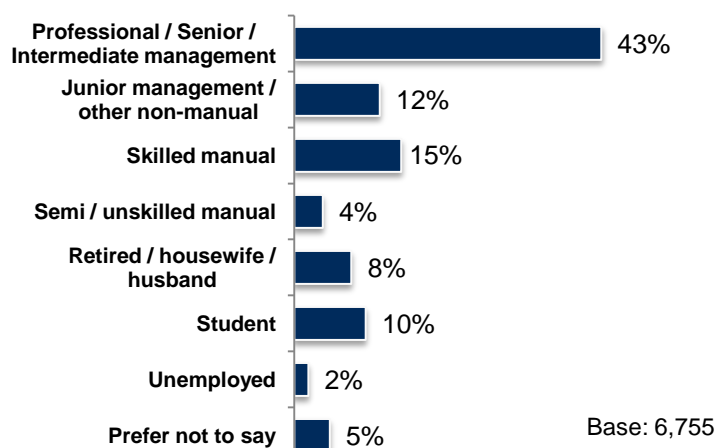
Base: 6,755

Income



Base: 6,755

Occupation

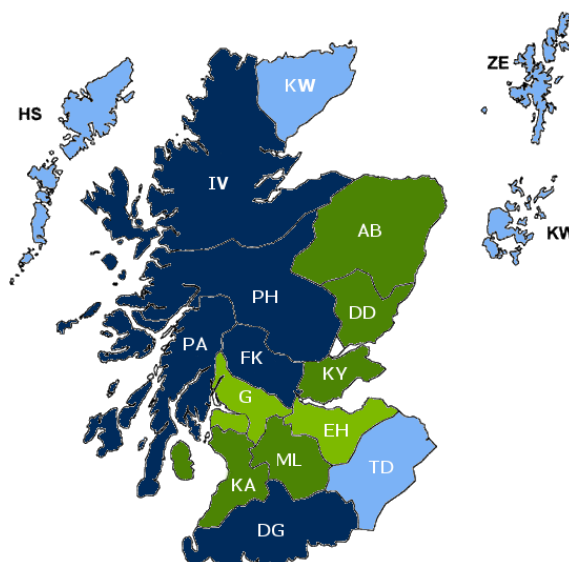


Base: 6,755

Survey Responses by Region

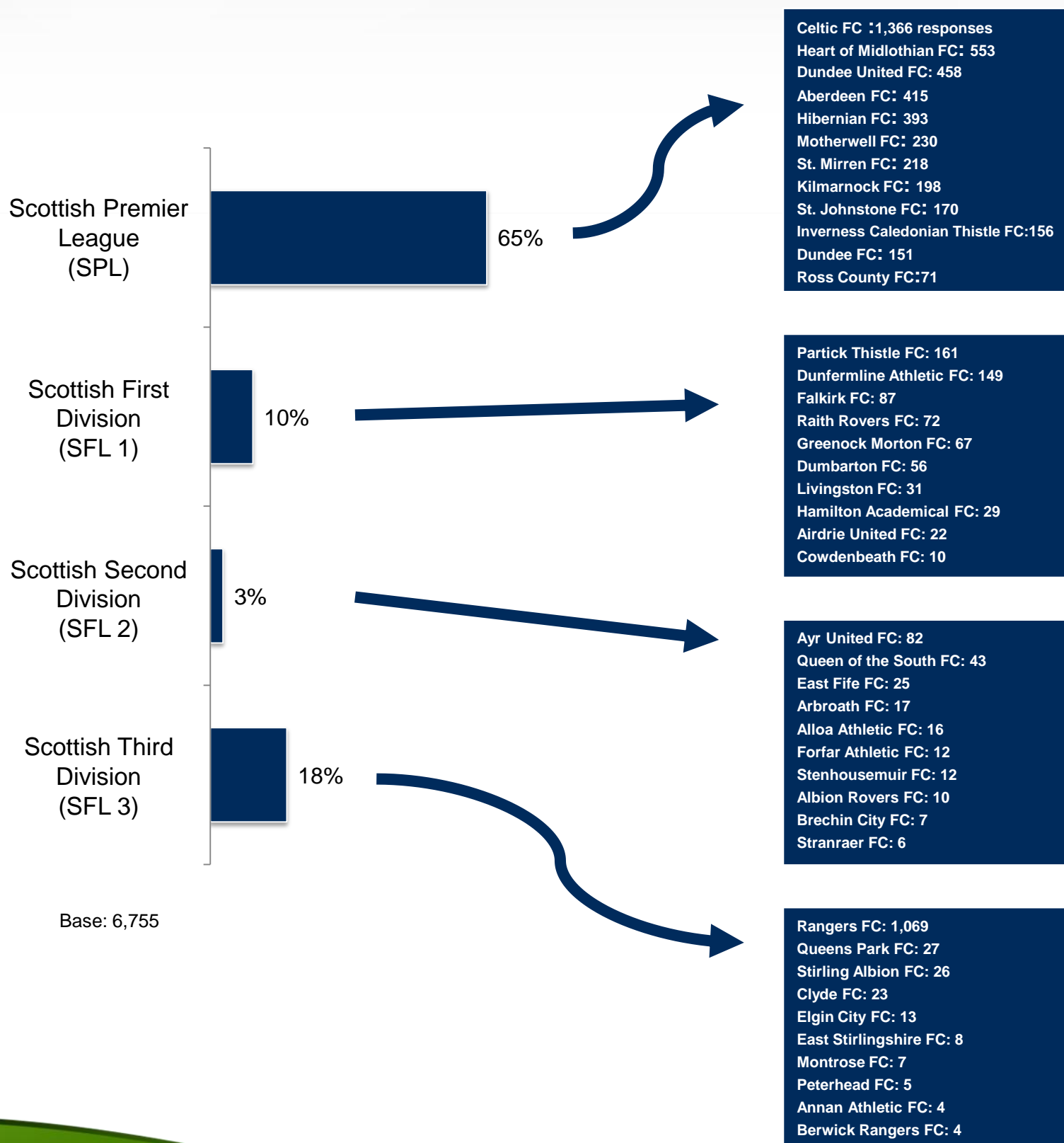
Key

- More than 1,000 responses
- 400-999 responses
- 100-399 responses
- Less than 100 responses



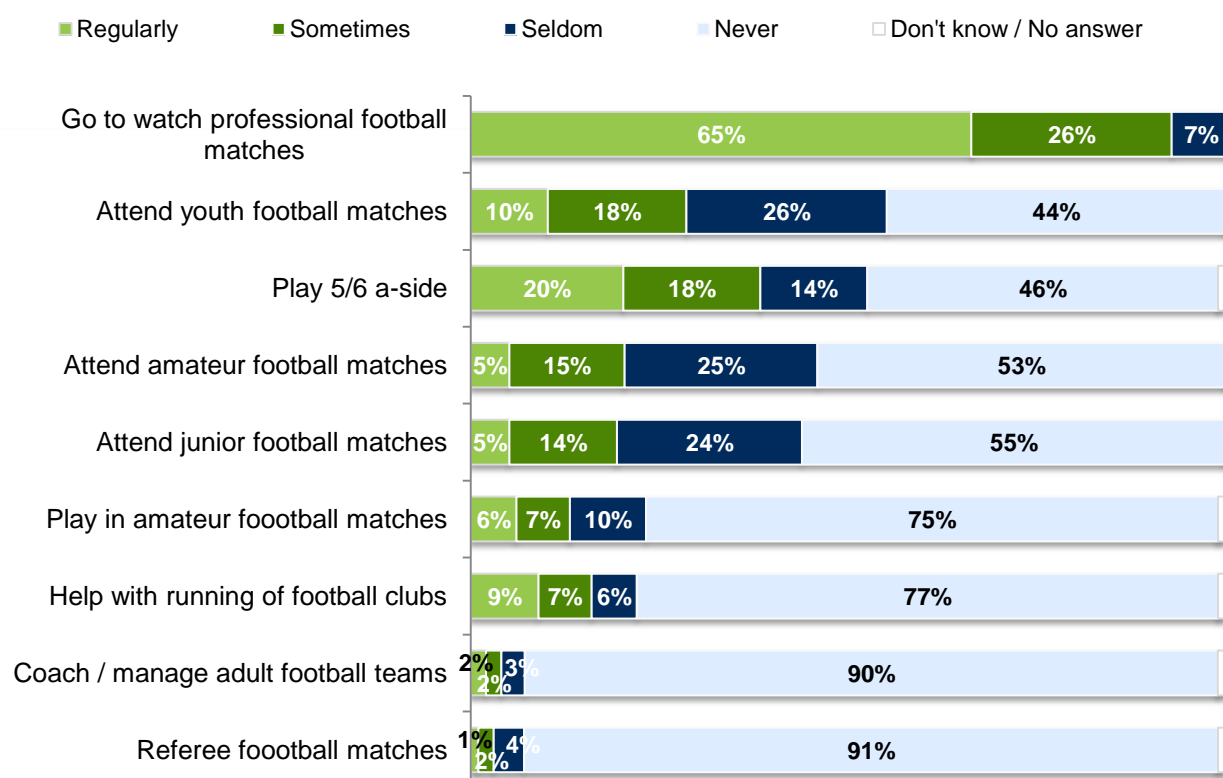
Profile of Scottish Football Fans Surveyed

Survey Responses by Club



Profile of Scottish Football Fans Surveyed

Involvement in Football



Base: 6,755

The survey respondents had a very high interest in Scottish football and were particularly avid fans. Respondents were regular football attendees, with almost all fans (98%) stating they attend professional football matches – in addition, more than half watched youth football matches (54%), and over two-fifths attended amateur football matches (45%).

There was a high level of participation to some extent in 5/6 a-side football (52%), with just under a quarter playing amateur matches (23%).

- Overall, around two-thirds of survey respondents (64%) considered themselves 'keen supporters' and regularly attended games, with a further quarter (27%) classed as 'supporters', going to live games, but less frequently. Only 9% did not regularly attend games.

THE SCOTTISH FOOTBALL ASSOCIATION



As the governing body of football in Scotland, the Scottish Football Association (Scottish FA) created questions to gauge fan opinion on crucial aspects of the football landscape in the country. These questions looked at the standard and performance of Scottish football, governance of the sport and football at youth and non-professional level.

Perform and Win

In the 2012/13 football season, the Scotland national team began their campaign for qualification for the 2014 World Cup, whilst Scottish clubs, as always, competed in domestic and European competitions. As part of the National Football Survey, Scottish football fans were asked how they rated the performance of the national sides and Scottish sides in Europe, whilst they were given the chance to give their opinion on what they felt was needed to improve the standards of the national game.

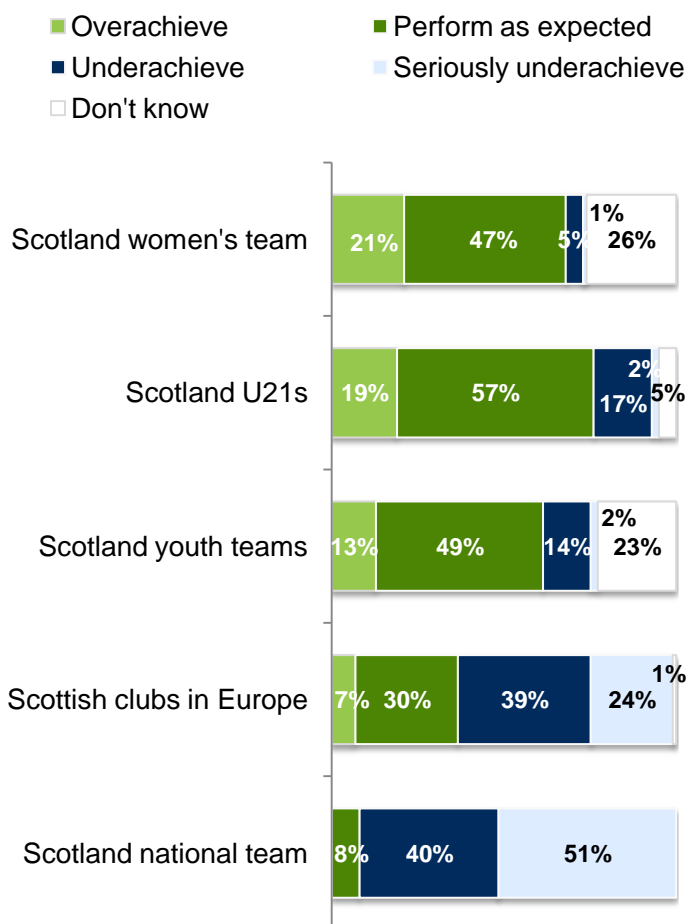
Performance of Scottish National Team and Clubs

Prior to survey launch, Scotland had failed to win any of their opening four group fixtures. It was therefore unsurprising to find that:

The vast majority of supporters feel the Scottish national team are underachieving or seriously underachieving (91%) – only 8% think they are performing as expected.

Fans generally feel that Scotland's youth and under 21 teams are performing as expected or overachieving.

Despite Celtic's progress to the knockout stages of the UEFA Champions League, beating Barcelona and Spartak Moscow along the way, nearly two-thirds (63%) feel that Scottish clubs underachieve or seriously underachieve in European competitions.



Base: 6,755



Perform and Win

Improving Standards of Scottish Football

Most important factors for improving standards of Scottish football

RANKED BY IMPORTANCE

1. Better coaching
2. Increasing grassroots participation
3. Better facilities
4. Stronger financial regulation
5. Stronger supporter representation
6. Earlier season start (from late June/July)



Supporters feel the most important factor for improving the standard of Scottish football is better coaching. An increase in grassroots participation, leading to a larger pool of Scottish footballers, is also deemed to be very important.

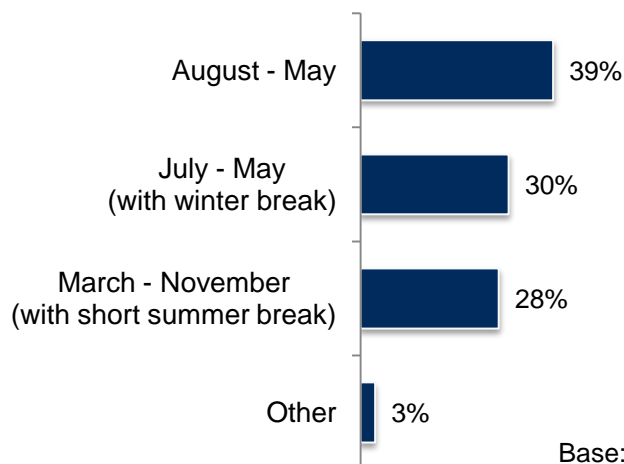
To help drive the improved coaching and increased participation, fans placed value on the need for better footballing facilities.

Fans feel shifting the Scottish football season to an earlier start to be the least important factor in improving the standards of Scottish football.

The football season in Scotland

Opinion is split amongst fans as to when they would like to see the Scottish football season played.

There is a fairly even proportion of fans wanting to see the season run from July – May (30%) and March – November (28%), with a somewhat higher number of supporters preferring a season from August to May (39%).



Base: 6,755



Perform and Win

Improving Standards of Scottish Football

Most responsible for improving standards of Scottish football

RANKED BY RESPONSIBILITY

1. **Scottish FA**
2. **The clubs**
3. **SPL**
4. **SFL**
5. **The Scottish government**



As the national governing body of the sport, the Scottish FA are deemed most responsible for improving the standards of Scottish football. Interestingly, the clubs themselves are judged second most responsible, more so than both league governing bodies (the Scottish Premier League (SPL) and Scottish Football League (SFL)). Fans feel the footballing organisations themselves should be responsible for improving Scottish football standards over the Scottish government.

Most important factors to achieve better understanding of the role of referees

RANKED BY IMPORTANCE

1. **Explanation of decisions post-match**
2. **Better relations between players, managers and referees**
3. **Goal line technology**
4. **Better education of fans on the laws of the game**
5. **More focus on football media reporting and punditry**

Fans want refereeing transparency - they feel explanation of decisions post-match is the most important factor in achieving a better understanding of the role of referees. This transparency may well have a knock-on effect in aiding the second most important factor, the need to improve relations between referees, players and manager.



Respected and Trusted to Lead

As part of the survey, fans were asked what they thought were the main functions of the Scottish FA, and what were its top priorities. Furthermore, the survey examined knowledge of reports and plans with regards to the structure and future of football in Scotland, asking fan opinion of changes to the disciplinary system.

As a current topic of debate, fans were questioned on what they thought would be the ideal size of the top division in Scottish football, why they chose that size, and how many football divisions overall Scotland should accommodate.

Governance of Scottish Football

Almost two-thirds of fans surveyed (64%) agree to some extent that the Scottish FA has failed at its job until the national team qualifies for a major tournament, with 21% thinking Scotland would be overachieving if they qualified for one.

There was an overwhelming agreement that football bodies need to work more closely together for the good of Scottish football (95%).

Function of the Scottish FA

1. **Scottish national teams (79%)**
2. **Disciplinary issues (51%)**
3. **Scottish Cup (49%)**

Scottish football supporters clearly indicate where they feel the Scottish FA's main responsibility lies – when asked to identify the three main functions fans most closely associate with the governing body, the Scottish national teams were highlighted above all other roles.

Fans evidently view the national teams as the top priority for the Scottish FA, and ultimately the organisation's performance will be judged on the international performances of those teams.

Most influential in Scottish FA structure

Amongst the influencing entities within the Scottish FA, fans deem the board, followed closely by the professional game board, to hold the most authority.

RANKED BY INFLUENCE

1. **The board**
2. **The professional game board**
3. **The council**
4. **Compliance officer**
5. **The non-professional game board**



Respected and Trusted to Lead

Disciplinary Procedures

Half of supporters (51%) think disciplinary decisions are made more speedily since the Scottish FA procedure changes, whilst over a third (37%) believe the judiciary panel brings independence.

Just over a quarter of fans (27%) think that the changes to disciplinary procedures have made a difference, although only 13% agree that the process is well explained.

Only a small percentage of fans (9%) feel changes to disciplinary procedures were not necessary, whilst half (51%) thought judicial panel members should remain anonymous.



McLeish Report and Scotland United: A 2020 Vision

Awareness of the McLeish Report, a report compiled by former First Minister Henry McLeish outlining proposals to improve Scottish football, is very high (89%) amongst Scottish football fans. Of those aware of the report, a third (34%) feel the Scottish FA has shown no willingness to change since its publication, over a quarter feel there have been some steps towards change (28%), and three-in-ten believe change has been slow to be implemented (29%) - only 1% of fans believe changes have been quickly implemented.

Awareness of the Scottish FA's 'Scotland United: A 2020 Vision' strategy is a lot lower than that of the McLeish Report (16%). Fans believe the top 3 priorities of the strategic plan should be:

- 1. Strong quality growth at grassroots level: 70%**
- 2. Better leadership and trust to run the game at all levels: 68%**
- 3. National teams qualifying for finals: 61%**

When asked about what factors are important in improving Scottish football, fans again emphasised that any plan designed to invigorate the game should aim to develop the sport at the grassroots level.

Respected and Trusted to Lead

Media Communications

Most trusted media Platforms

RANKED BY MOST TRUSTED

- | | |
|------------------------------|----------------------|
| 1. Official club websites | 6. Blogs and forums |
| 2. Official club mobile apps | 7. Other mobile apps |
| 3. TV | 8. Newspapers |
| 4. Radio | 9. Twitter |
| 5. Other media websites | 10. Facebook |

Club generated content, such as official websites and mobile apps, are considered by fans to be the most reliable source for football news, followed by the more traditional media channels of TV and radio – interestingly, newspapers are deemed by Scottish football fans to be somewhat untrustworthy compared to other media sources. Despite the ever growing use of and interest in social network sites in today's world, such as Twitter and Facebook, these predominantly user-generated sources are judged to be the least trustworthy media platforms.

Best Method for Scottish FA to communicate to Scottish football fans

RANKED BY BEST METHOD

1. Engage with established supporters groups
2. TV and radio debates
3. Regular website news
4. Open up AGM to debate
5. Via fans' roadshows
6. Via social media



Fans generally feel the best way for the Scottish FA to communicate with them was via supporters groups, whilst debates on TV and radio media are also viewed as a good method. Mirroring sentiment towards social media as a less trustworthy source of football news, fans felt social media was the least appropriate method for the Scottish FA to communicate with fans.

Respected and Trusted to Lead

League Reconstruction

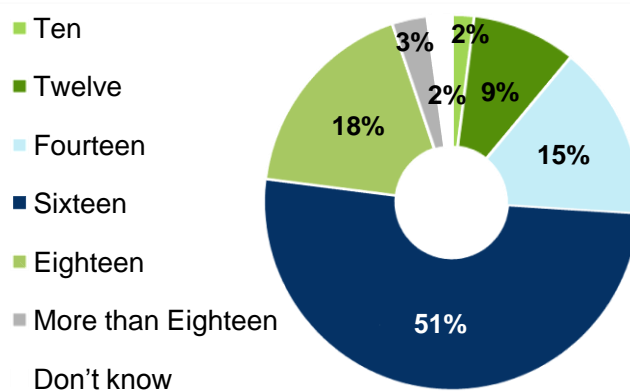
The question on league reconstruction and, in particular, preferred league size took place before the recent SPL and SFL discussions towards a consensus model of 12-12-18. Nonetheless, the supplementary rationale from respondents provides key feedback on the underlying reasons for preferred league size and model.

51% of supporters surveyed believe a 16-team league would be their preferred model. A variation of other models - including fewer number of teams and greater number of teams - did not achieve a definitive alternative. Again, the survey pre-dates the suggested option of 12-12-18.

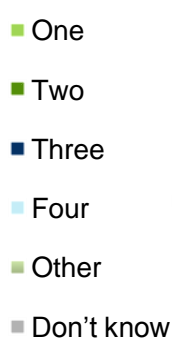
Scottish supporters generally favour a bigger top division as it reduces the number of games against the same teams per season.

Almost two-thirds (62%) think Scottish football should accommodate 3 divisions - just 8% feel that four divisions, the current setup, is appropriate.

Preferred number of clubs for top division



Preferred number of leagues



Reasons for favouring top division size

RANKED BY IMPORTANCE

1. Reduces number of games against each team per season: 48%
2. Makes league more competitive: 24%
3. No difference in standard between bottom of SPL and top of SFL1: 13%
4. Gives more clubs access to more money: 6%
5. Removes weaker clubs: 3%
6. Other: 6%

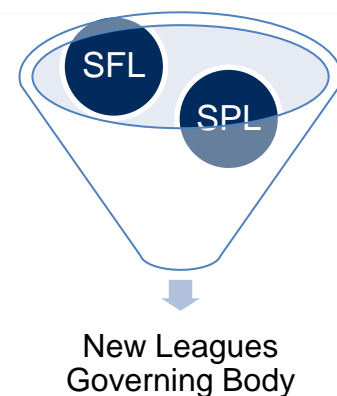
Respected and Trusted to Lead

League Reconstruction

Important factors for any league reconstruction

RANKED BY IMPORTANCE

1. Merger of bodies
2. Fairer financial distribution
3. More promotion / relegation play-offs
4. Pyramid system below the third division
5. Addition of a winter / mid-season break



Scottish football fans feel that a merger of the governing bodies is important to the reconstruction of the leagues, whilst fair financial distribution was also seen as a key factor.

Supporters evidently do not feel it is important for league reconstruction to change timings of the Scottish football season - in addition to not placing great importance on an early start to the season (to improve the standards of football in Scotland), supporters do not deem a winter or mid-season break as vital to league reconstruction either.

As previously noted, there is a split decision amongst fans as to when the Scottish football season should take place during the year, again, for league reconstruction, there is no strong supporter opinion and the issue is deemed to be less important than other factors.

Respected and Trusted to Lead

Better Financial Returns

Almost three-quarters of Scottish football fans (71%) agree that more stringent financial regulations should be applied to clubs. The vast majority feel there should be a focus on developing home-grown talent (92%), whilst the same percentage are of the opinion that clubs need to be more responsible with their spending – furthermore, over four-fifths agree that clubs need to be more accountable to their fans (83%). Over two-fifths (43%) think that football is run like any other business.

Priority areas for Scottish FA to spend sponsorship & commercial revenue

RANKED BY PRIORITY

1. Grassroots development
2. Facilities
3. Coaching
4. Elite youth development
5. Referee development



Scottish football fans feel the main priority area to which the Scottish FA should drive sponsorship & commercial revenue funds, is grassroots development – this again highlights the perception amongst fans that the Scottish game must be improved from the ground upwards, through initially driving increased youth participation.

Mirroring sentiment identified earlier in this report - supporters feel better coaching and facilities are important factors in improving Scottish football - fans feel Scottish FA funding should, as a priority, focus on these same two areas.

Club Governance

Scottish football fans strongly believe that they should be directly engaged by / involved in the clubs they support:

- The vast majority feel that fans should be represented at club board level (93%)
- Four-fifths agree that the fan-owned / controlled club model can work in Scotland (79%)



Strong Quality Growth

Continuing on the topic of grassroots football, youth and non-professional football matters are high on the Scottish FA agenda. If Scottish football is strong at the grassroots level, the professional game will benefit. Fans were asked about their awareness of youth football initiatives in Scotland, their views on the performance of the Scottish FA in their provision of youth football, and their opinion on the major obstacles the governing body face in their objective to get more youngsters engaged with the sport.

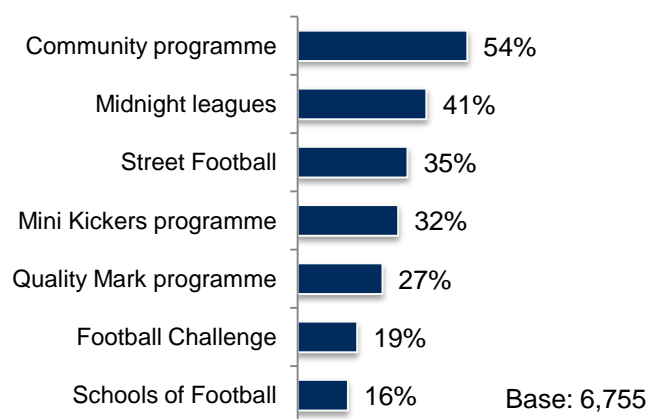
In terms of non-professional football, respondents were asked about their involvement at this level and whether the Scottish FA provides sufficient support for the non-professional game.

Youth Football

Awareness of community initiatives varies greatly, with the Community programme recording the highest recall (54%).

Around two-in-ten fans are aware that under 16s are entitled to free admission to Scottish FA youth matches. Considering factors that would encourage fans to take up this offer, 39% state they would be more likely to take advantage of it if there were school initiatives to take pupils to the match, whilst a similar percentage feel they would if matches did not clash with other major football events (38%).

Awareness of community initiatives



One of the Scottish FA's major objectives is to encourage children to participate in more hours of quality football practice in order to improve standards. Respondents were asked to rank what they felt were the biggest obstacles to achieving this goal:

- The primary concern of fans was that Scotland may not have enough facilities to cater for increased participation, whilst they are also concerned that other leisure activities, such as computer usage, could be an obstacle. The third ranked factor was financially based, the cost to parents proving a barrier to children getting involved in football.
- Over two-fifths of Scottish football fans (44%) think the Scottish FA are committed to the development of youth players, although the vast majority (83%) believe the Scottish FA should do more to encourage youth participation. Almost three-quarters agree that the government should provide the Scottish FA with the help they need (71%), whilst four-fifths thought that the Scottish FA's focus on youth participation should result in a more competitive national team (81%).



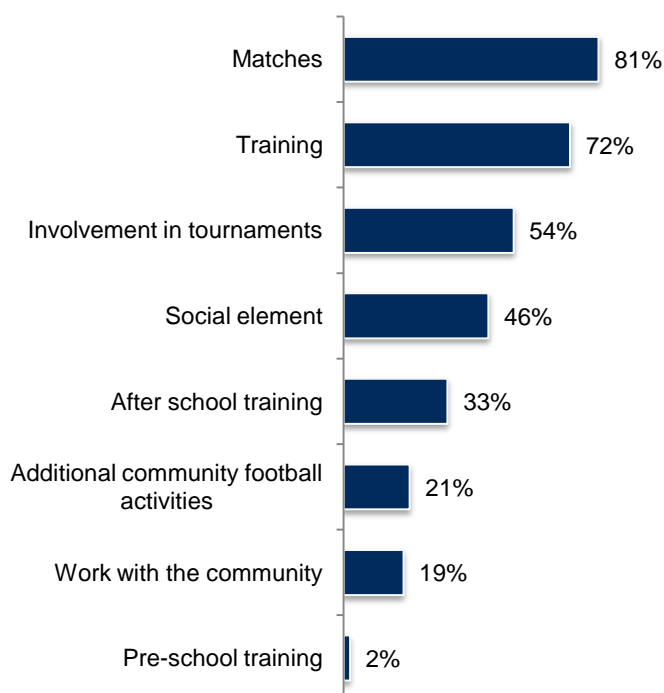
Strong Quality Growth

Non-Professional Football

Overall, a quarter of Scottish football fans (24%) are involved in the non-professional game in some capacity - of these, playing amateur football was the most common activity (30%).

Almost all fans involved in non-professional football (95%) agree that it is important to get youngsters involved at that level of the game. The vast majority (90%) believe that non-professional football is important to local communities as it gives a sense of community spirit. More than six-in-ten are of the opinion that the non-professional game is important as it provides the future players for the national team (62%).

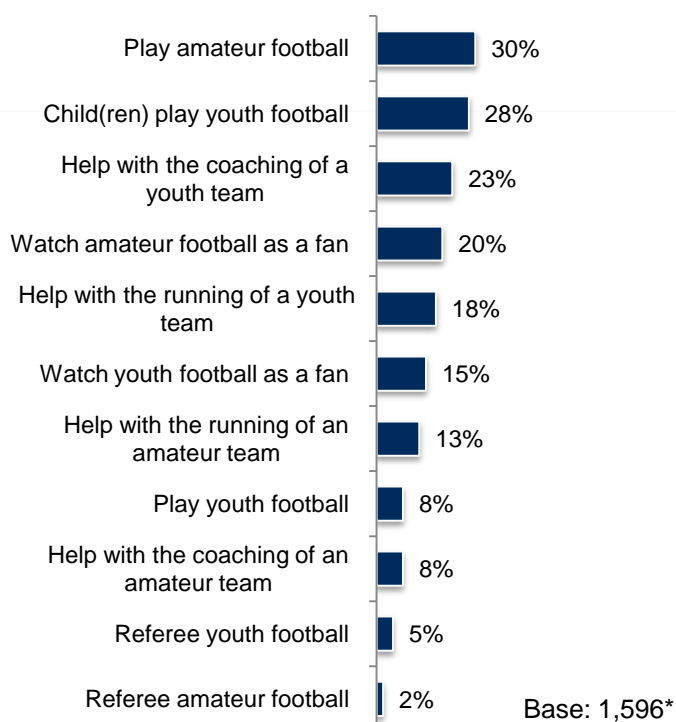
Non-professional football activities offered by clubs



Base: 1,596*

*Those with an involvement in non-professional football

Involvement in non-professional football



Just 16% of fans think the Scottish FA provide sufficient support for football at a non-professional level, whilst 11% believe there is enough support from local authorities.

Matches (81%) and training (72%) are noticeably the most likely football related activities offered by non-professional clubs.

Over half (54%) are involved in football tournaments.



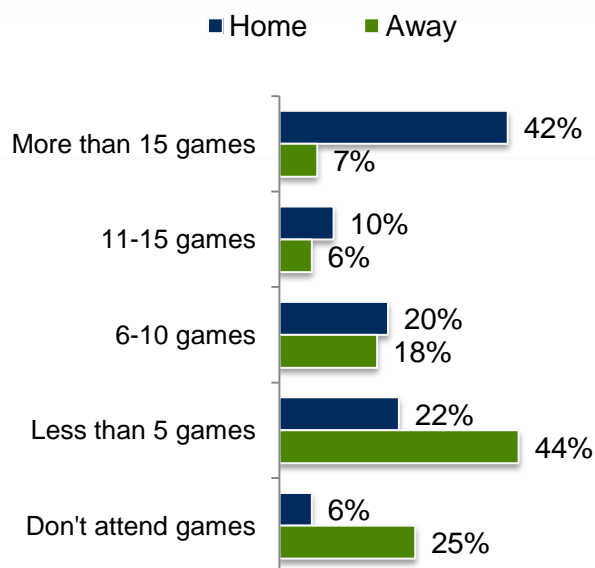
CLUB FOOTBALL IN SCOTLAND



The Scottish Premier League (SPL) and the Scottish Football League (SFL) collaborated to examine fan match day experience in Scotland's four divisions. The questions in this section of the National Football Survey included frequency of match attendance, average spend on a match day, and the importance and performance of key attributes of the club match day experience.

Match Day Attendance & Level of Support

Match Attendance



Base: 6,608*

*Those who support a Scottish league football team

The surveyed Scottish football club supporters are far more likely to attend home games than away games, with half attending 11 or more home fixtures per year (52%). 75% of respondents attend at least one away game per season.

- Two-thirds of fans feel valued by their club when they attend a home match – 66% rated 7+ out of 10 on a rating scale with 10 being 'strongly valued'.

More than three-quarters of respondents (77%) feel football is an important part of their family's life.

Top 5 reasons for supporting chosen Scottish Club

TOP 5 REASONS

1. Local club (52%)
2. Parental influence (42%)
3. Family influence (39%)
4. It was the first game I went to (34%)
5. The match day experience (21%)

Base: 6,665**

**Those who support any Scottish football team

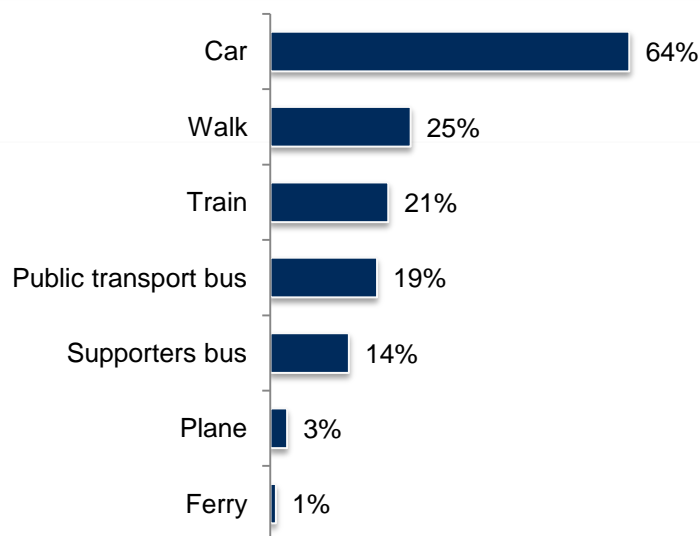


Local allegiance was the key factor for respondents in choosing which Scottish football team to support, with parental / family influences also important.

Match Day Travel & Company

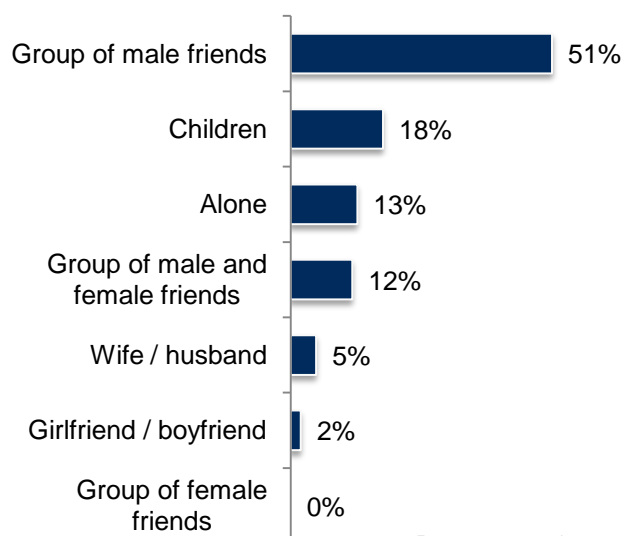
Mode of transport

More than six-in-ten fans travel to matches by car (64%), making it by far the most popular form of transport. A quarter of supporters walk to the stadium (25%), indicating that a large number of Scottish supporters truly support their 'local' club – based on Repucom studies, this figure is much higher than at many other sporting events. Public transport is also widely used - trains (21%) and buses (19%) cater for two-fifths of match day travel.



Base: 6,212*

Who you go with



Base: 6,212*

*Those who support a Scottish league football team and attend home matches

Attendance at Scottish football games is very much a social event – over three-fifths of fans go to matches with a group of friends (63%).

The Scottish football match day experience is also a popular family activity with just under a quarter of respondents attending matches with their spouse or children (23%).

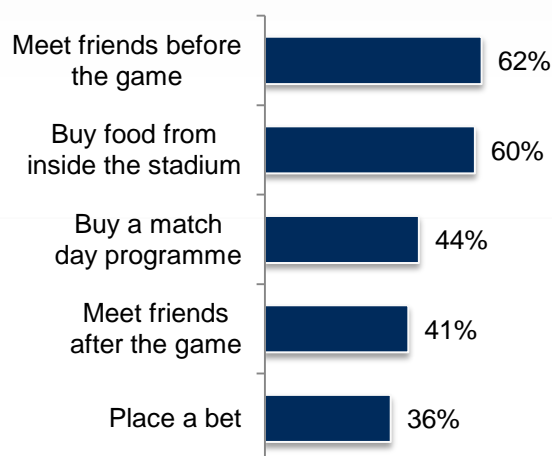
- Overall, the average (mean) group size when attending a Scottish football home game is 3.8 people.

Match Day Activities & Expenditure

Match Day Activities

Football matches can be seen as social events when looking at other match day activities – two of the top 5 ranked activities involve meeting friends, with three-fifths of fans surveyed meeting friends before the game (62%), and two-fifths meeting friends after the game (41%).

Top 5 Activities



Base: 6,212*

Match Day Expenditure

	Don't Buy	Up to £2.99	£3-£5.99	£6-£9.99	£10-£19.99	More than £20	Average Spend
Food and/or soft drinks	17%	14%	34%	22%	11%	3%	£5.81
Travel to / from stadium	21%	14%	21%	14%	15%	14%	£9.17
Alcohol	52%	2%	7%	11%	18%	12%	£7.21
Betting	60%	8%	16%	7%	7%	1%	£2.86
Club shop purchases	68%	4%	6%	6%	8%	7%	£4.30

Base: 6,212*

*Those who support a Scottish league football team and attend home matches

Of the categories listed above, and excluding ticket cost, Scottish football fans are most likely to spend money on food and drink on a match day (83%) and least likely to spend money in the club shop (32%). Travel to/from the match was the most significant match day cost (£9.17 on average).

Overall, the total average fan spend on a match day is £27, excluding match ticket cost.

The Match Day Experience

Match Attendance

Unsurprisingly, the most important elements of the match day experience relate to the 90 minutes of football on show - fans seek entertaining football, a good atmosphere, a win, and a good standard of refereeing.

In terms of the match day experience, Scottish stadia are seen as safe and clean, to have clear sight lines, and are deemed suitable for family entertainment. Supporters suggest there is room for improvement in terms of the quality and value of refreshments provided – however, although 60% of fans buy food on a match day, they do not judge this area to be of high importance. Scottish football fans' lowest rated performance aspect of the match day experience is the standard of refereeing.

At present, supporters believe entertaining football, the atmosphere, and the refereeing standards, fall short of expectations.



*Not rated for performance

**Those who support a Scottish league football team and attend home matches

Barriers to attending more home fixtures

TOP 5 BARRIERS

1. Ticket cost (54%)
2. Work commitments (43%)
3. Kick-off times (38%)
4. Family commitments (31%)
5. Transport costs (24%)
6. Standing is currently prohibited (22%)
7. Quality of football (22%)
8. No opportunity to purchase alcohol (17%)
9. Standard of Policing / Stewarding (14%)
10. Poor match atmosphere (12%)

Base: 6,665

Ticket cost was the primary barrier to fans attending more home fixtures (54%). Transport costs are also proving a hindrance for a quarter of fans (24%). Other significant barriers were work (43%) and family (31%) commitments, reflecting a clash with other lifestyle priorities. 38% of respondents specified kick-off times as an issue.

22% of respondents indicated dissatisfaction with the fact that standing is prohibited at their club, whilst 17% cited that the lack of opportunities to buy alcoholic drinks was a barrier to match attendance.

What Your Club Means to You

Survey respondents were asked to describe what their club meant to them in no more than 50 characters. Fans were emotive in their responses, demonstrating that their clubs playing an important part of their lives. Below are a selection of the comments made by supporters, and a word cloud of all responses.

"It's my local team. Can't imagine going elsewhere."

Male, 45, Ayr United

“Lifelong love affair!”

Male, 45, Rangers

“Like a best friend.”

Male, 19, Aberdeen

“Entertainment. Heart attack invoking at times!”

Female, 40, Celtic

"My club means that I get away from my house."

Male, 15, Queen of the South



***“They are rubbish,
but they are my rubbish.”***

Male, 53, Stirling Albion

***“Over 60 years of accepting
more downs than ups.”***

Female, 60, Queens Park

***“A source of passion
when the sky is dreich.”***

Male, 42, St. Johnstone

***"A forced marriage that
you can never leave."***

Male, 32, Partick Thistle

***“Almost as much as
my wife”***

Male, 54, Stranraer

Note: The graphic displays all the words used in fan comments. More frequently used words are displayed in a larger font size.

Contact Details



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