

Scottish Football Supporters Survey 2011/12

Findings

*Prepared by Red Circle Communications
for Supporters Direct Scotland*

1 February 2012

the objective

To survey opinions of Scottish football supporters

- To ascertain the preferred size of top league
- To determine the views of supporters on major issues in relation to Scottish football
- To assess whether supporters feel there is a role for fans to be consulted on major decisions affecting Scottish football and how that consultation should happen

the method

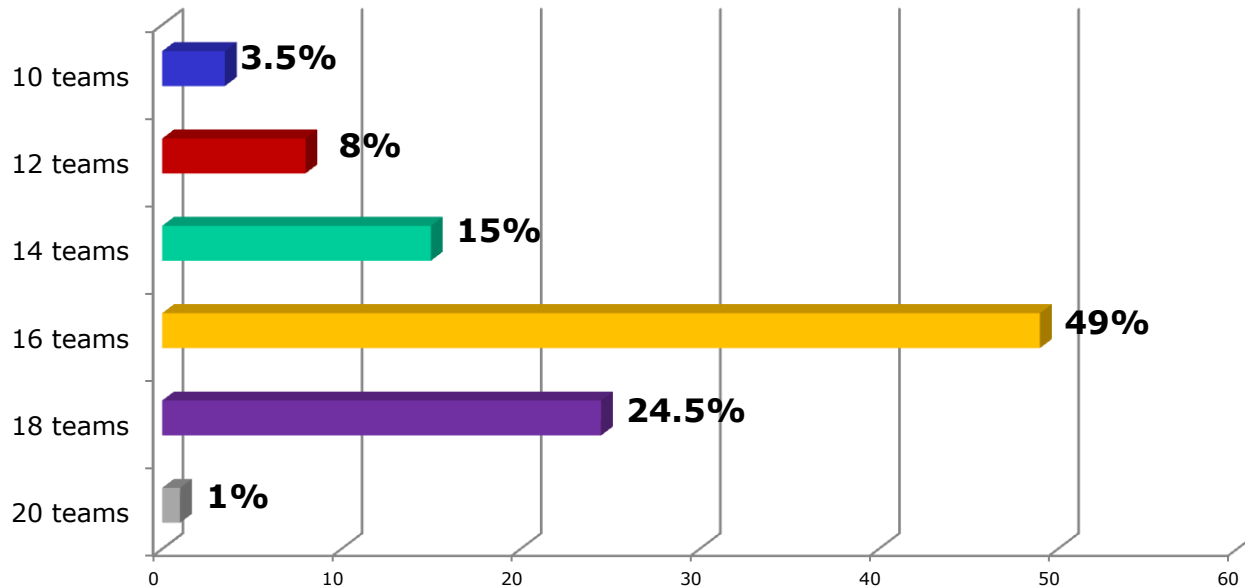
- An online survey of 3,407 respondents conducted between 8 Dec 2011 and 8 Jan 2012
- Short, focused questionnaire using pre-coded responses to encourage response
- Promoted through a variety of routes (online forums, club websites, national media)
- Data-checked using IP addresses to ensure the validity of the data and analysed using SPSS
- Large sample size provides robust samples of a range of sub-groupings including SPL/SFL supporters and Old Firm fans

detailed breakdown of sample

| | % | | | % |
|-------------------------------|-----|--|-------------------------------|-----|
| <u>Gender</u> | | | <u>Team supported</u> | |
| Male | 96 | | SPL | 61 |
| Female | 4 | | SFL1 | 21 |
| | | | SFL2 | 7 |
| <u>Age</u> | | | SFL3 | 3.5 |
| Under 18 | 3.5 | | Non-league | 7.5 |
| 18-34 | 38 | | | |
| 35-54 | 45 | | | |
| 55 and over | 13 | | <u>Attendance</u> | |
| | | | Attended 1-10 games | 22 |
| <u>Membership</u> | | | Attended more than 10 games | 66 |
| Supporters Trust | 26 | | Not been to a game | 12 |
| Other supporters Organisation | 21 | | | |
| SSC/ATAC | 17 | | Purchased a Season Ticket | 44 |
| None of these | 51 | | Not purchased a season ticket | 56 |

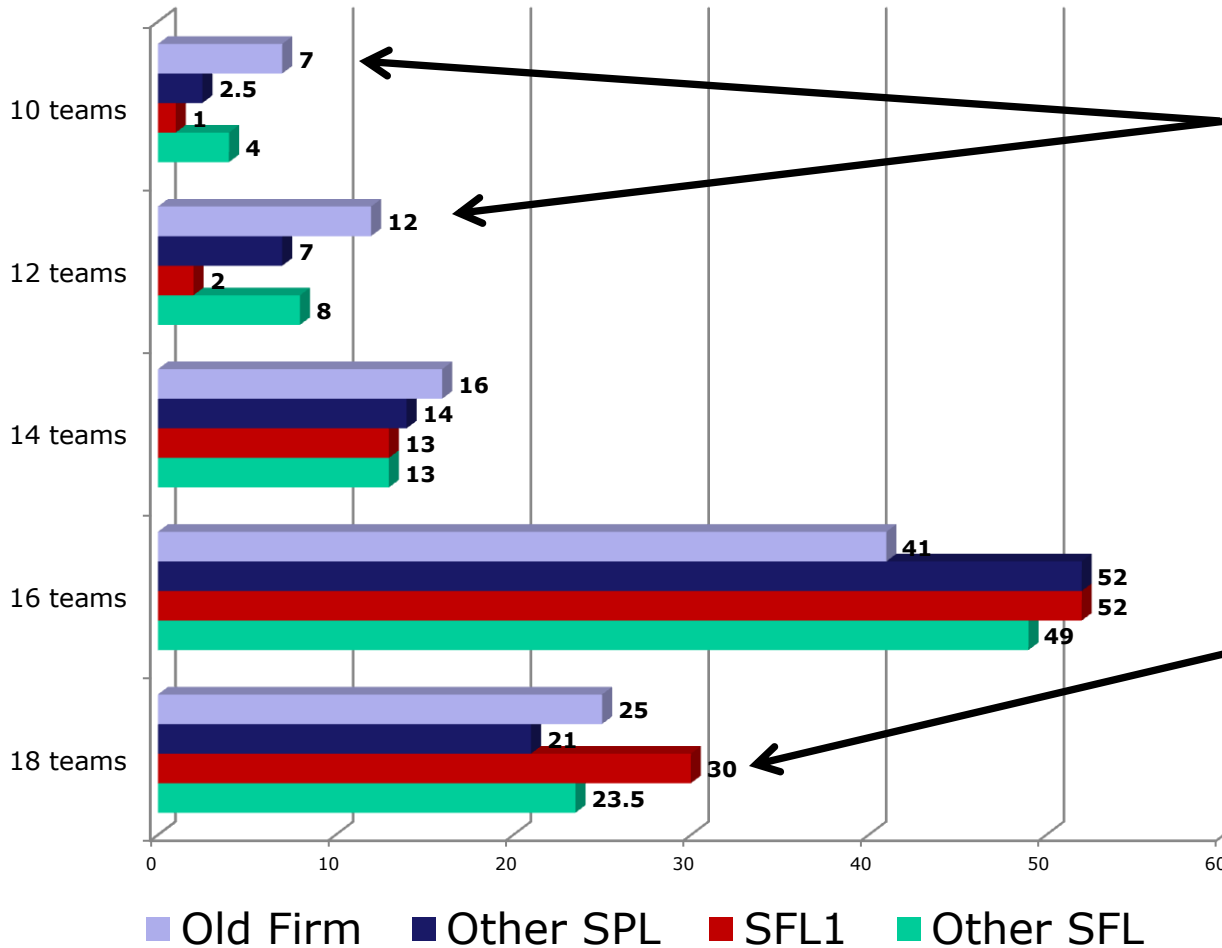
findings - top league structure

preferred size of top league



- The preferred size of league is for larger leagues with around 9 out of 10 fans wanting a league larger than the current set-up
- The 16 team option remains the most popular with fans gathering over six times the level of support than the current 12 team league

preferred size of top league – by type of supporter



Old Firm fans are slightly more likely to support the 10 or 12 team options but 81% of Old Firm supporters want a league bigger than at present

First Division fans most likely to want an 18 team league

preferred size of top league (2011 v 2010)

| | 2010 (%) | 2011 (%) | Change |
|----------|----------|----------|--------|
| 10 teams | 8.5 | 3.5 | -5.0 |
| 12 teams | 4.5 | 8.0 | +3.5 |
| 14 teams | 11.5 | 15.0 | +3.5 |
| 16 teams | 49.5 | 49.0 | -0.5 |
| 18 teams | 27 | 24.5 | -2.5 |

- The support for a 10 team option has more than halved since this time last year
- This coupled with a fall in support for an 18 team league has resulted in increased support for the 12 or 14 team league options
- Support for the preferred 16 team option has remained relatively constant accounting for around half of supporters

SPL position statement

- Respondents presented with a statement of the current SPL position



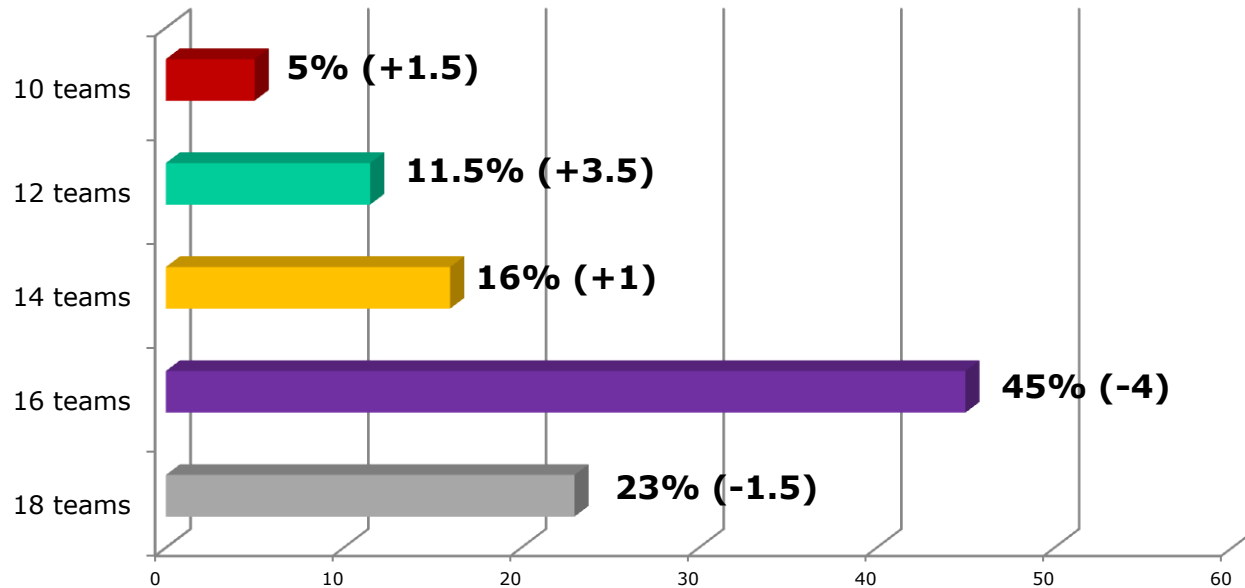
The SPL have recently signed a new £80m TV deal based on there being 4 Old Firm matches each season. They claim that any reduction in the number of Old Firm games would reduce the value of any future TV deal.

- Respondents then asked again for their preferred size of top league



Taking this into account what would be your preferred size of top league in Scotland?

preferred size of top league (after SPL position statement)



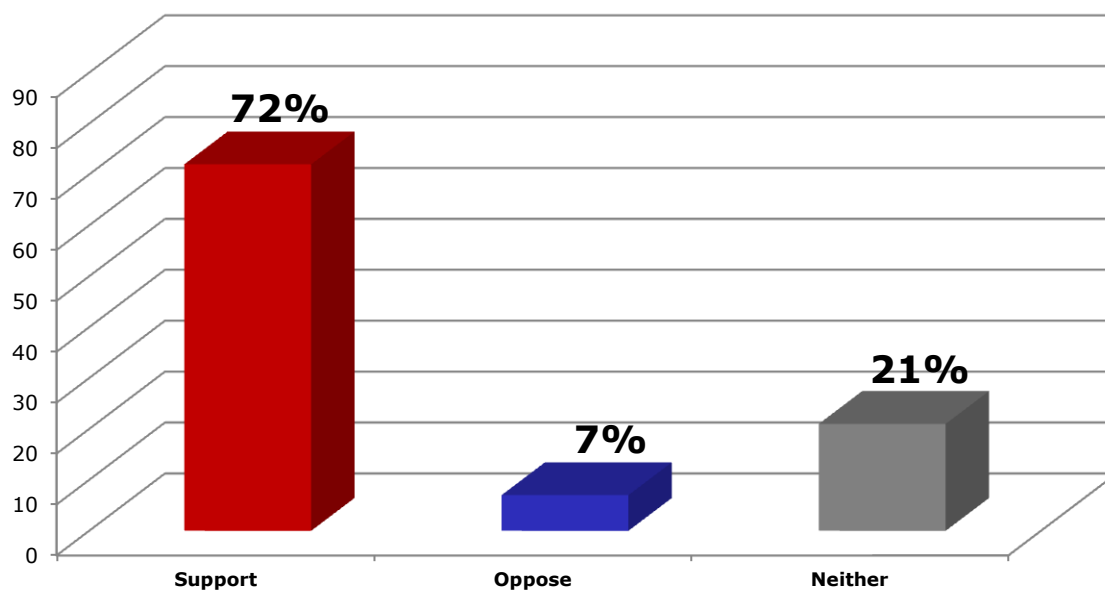
- After being presented with the SPL position, support does shift from the larger league options to the smaller league options but only at the margins. The main beneficiary of this movement is the status quo (up 3.5 points)
- There remains a clear preference for larger leagues even after fans are presented with the SPL position

If a 16 or 18 team approach is adopted for the top two leagues in Scotland

- There is a preference to organise the remaining clubs in a regional league set up (49%)
- Creating a smaller league with the remaining teams (22%) or electing new members to the league to ensure parity of size (30%) also had support
- Fans of clubs in the Second and Third division of the SFL are less supportive of adopting a regional set-up and have a stronger preference for electing new clubs to the league

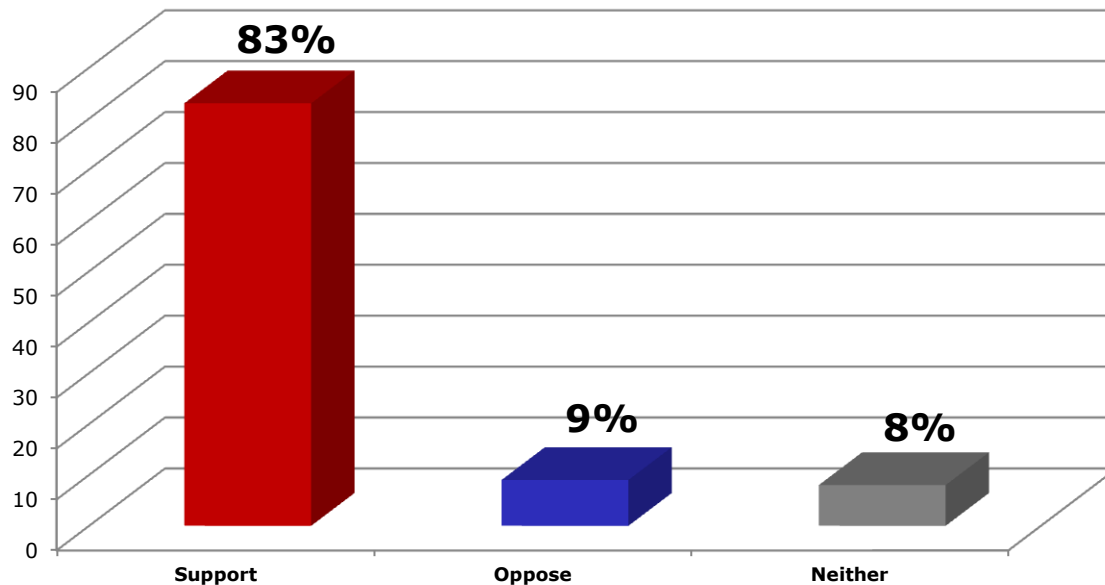
findings - structures and practices

a pyramid structure



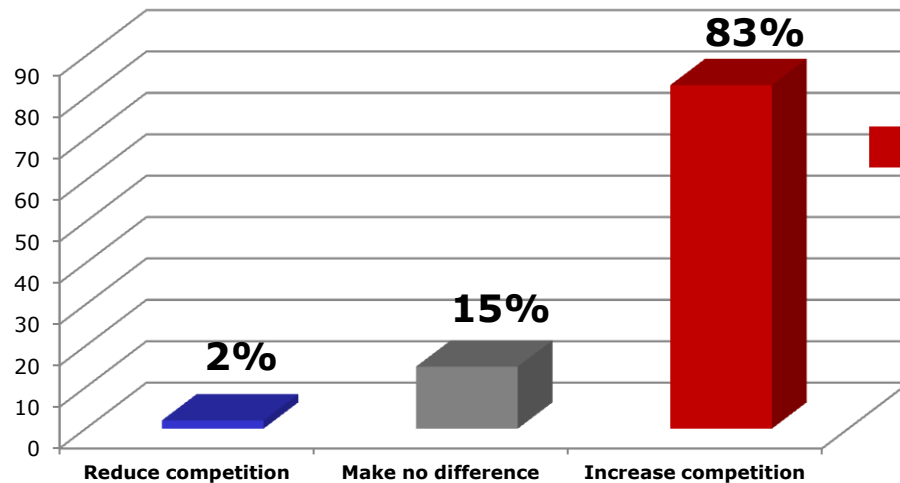
- There is a clear majority in favour of a pyramid structure being introduced into Scottish football with over two-thirds of supporters favouring such a move (72%)
- Support for a pyramid structure is higher amongst supporters of non-league clubs (84%)

distributing central revenue more equally



- There is strong support for distributing central revenues such as TV money or sponsorship more evenly with less one in ten opposed to such a move (9%)
- Opposition is largely confined to fans of the Old Firm. Amongst Rangers and Celtic fans 48% support a more equal distribution and 31% oppose such a move
- Support for a more equal distribution is highest amongst fans of First Divisions clubs (94%) and SPL clubs outside the Old Firm (95%)

impact of distributing central revenue more equally

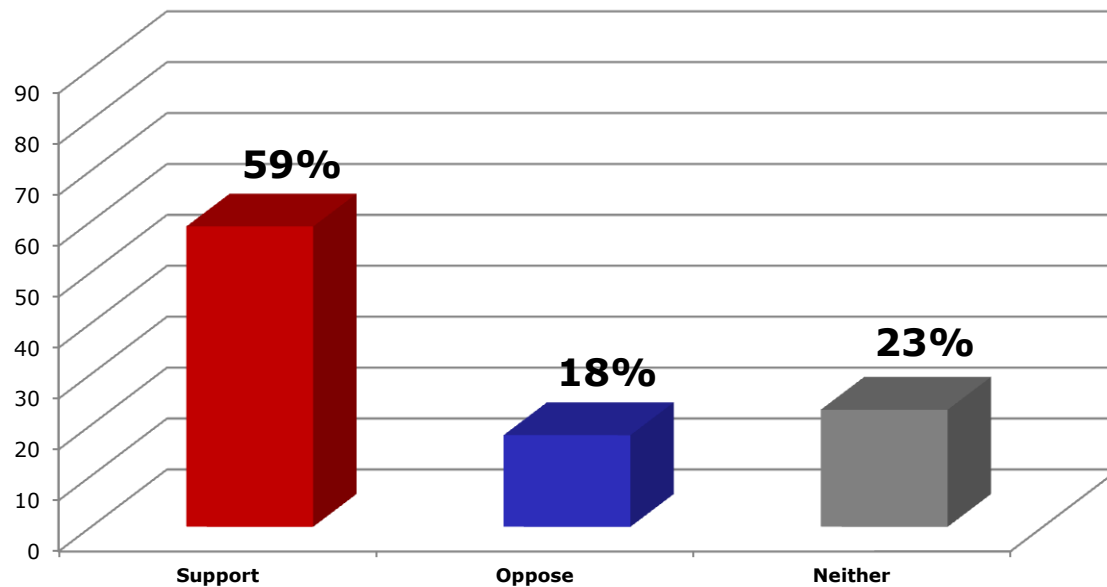


65% of fans say that they would attend more regularly if teams were more competitive

- There is a clear belief that distributing central revenues more evenly would increase competition in the league (83%)
- Old Firm fans are less likely to say that this is case with only 38% believing it would increase competition (59% of Old Firm fans feel it would make no difference)
- More competitive teams would be likely to increase attendance for around two-thirds of fans. Fans of First Division clubs and SPL clubs outside the Old Firm are more likely to say they would attend more regularly if games were more competitive (77% and 78% respectively). This was also the case for those who attended less regularly (72%)

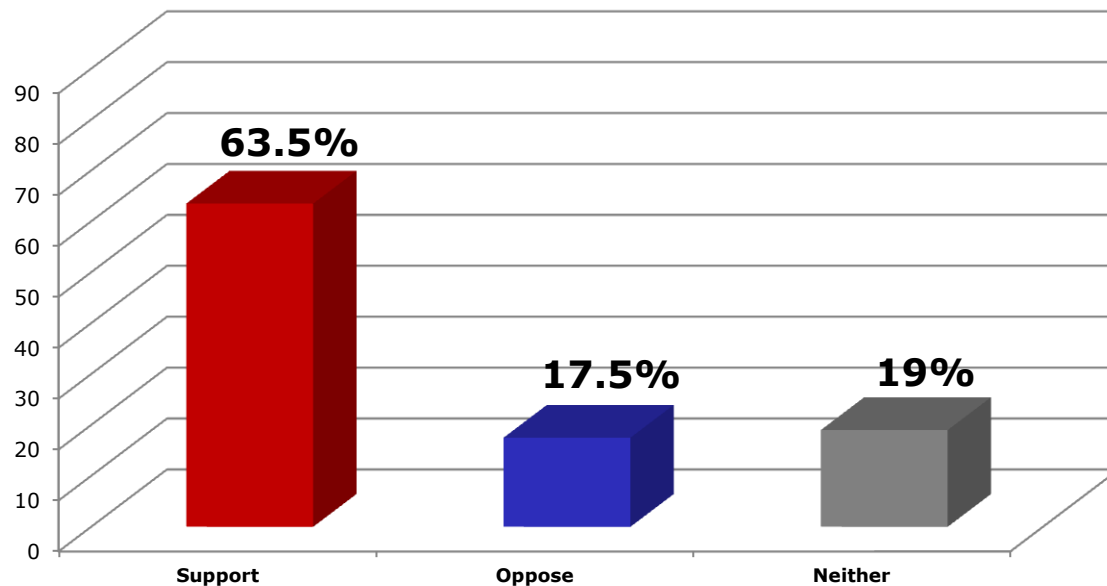
findings - timetable

an earlier start to the season in july



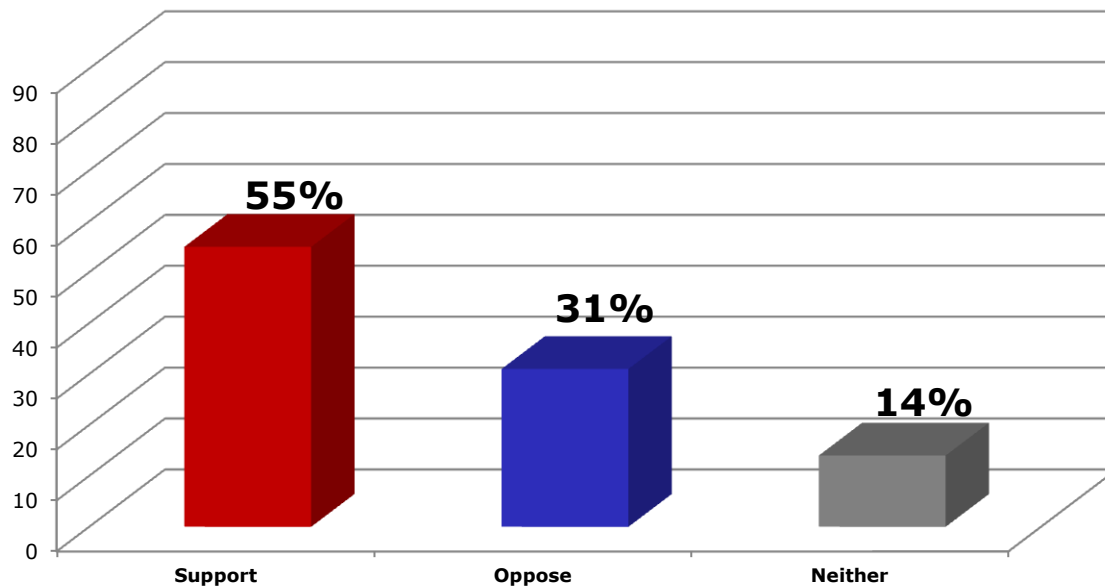
- There is a majority in favour of starting the season earlier although this figure is lower than the comparative figure last year (71% in 2010)
- Those opposing such a move has risen from 11% last year to 18% now

introduction of a winter break



- There is support for the introduction of a winter break with around two-thirds of supporters supportive of this idea (63.5%). These figures are broadly comparable to last year
- Old Firm fans are more likely to support a winter break (79%) while fans of teams in the Second and Third Division are slightly more likely to oppose such a move (25%)

a summer season from march to november



- Opinion is divided on shifting the season to the summer months with over half supporting such a move (55%) and around a third opposed (31%)
- Support for a summer season has risen marginally from 48% last year to 55% now

fan consultation and representation

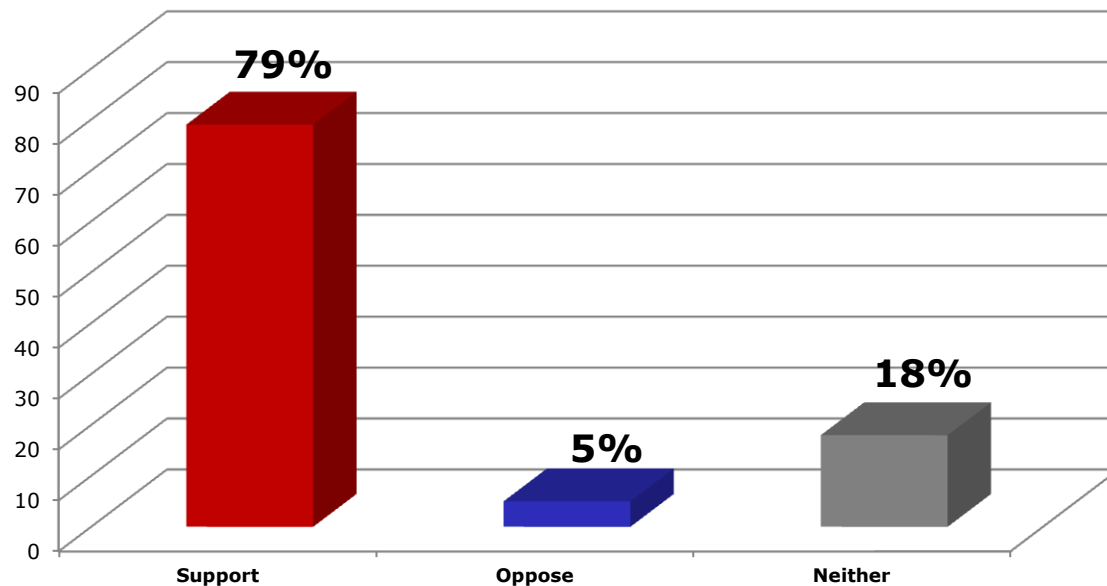
**98% of fans believe that fans
should be consulted on
decisions to be taken about
Scottish football**

How fans should be consulted

| | (%) |
|--|-----|
| Having access to a national fans organisation | 80 |
| Having representation on SPL/SFL Committees | 57 |
| Having representation on SFA Committees | 52 |
| Making their views known through media outlets | 37 |

- There is a demand for a national fans organisation to represent their views with over 8 out of 10 supporting this (80%)
- Having representation on SPL/SFL and SFA committees is also supported by the majority of fans (57% and 52% respectively)

clubs having to include fan representation on their board



- There was strong support for clubs having to include fan representation on their board with over three quarters supporting such a move (79%)
- Those involved in Trusts (89%) and other supporters organisations (82%) were more likely to be supportive than fans not involved in any supporters group (73%)

priorities for the Scottish Football Supporters Network



| | most important (%) |
|---|--------------------|
| Represent fan opinions to the SFA,SPL, SFL and Government | 57 |
| Campaign for improved rights for fans | 36 |
| Campaign for better facilities at matches | 16 |
| Organise regular surveys of fans on current issues | 11 |
| Promoting fan ownership | 8 |
| Produce policy papers for football authorities highlighting good practice | 7 |
| Organise meetings/web space for fans to discuss issues | 6 |

- The two most popular priorities of the Scottish Football Supporters Network was to represent fan opinion and campaign for improved rights for fans
- Younger fans aged 18-34 placed a greater emphasis on campaigning for fans rights (45%). Older fans aged 55+ were more likely to seek representation (70%)

ideas on how to improve Scottish football

innovative ideas

- 1,273 respondents provided their ideas to improve Scottish football (37% of the total respondents)

- The main suggestions included the following (in order of mentions)
 - A fairer distribution of the income
 - Larger leagues
 - Play offs to the SPL
 - Summer football
 - Cheaper ticket prices
 - Sectional League Cup
 - Reserve league re-introduced
 - Let the Old Firm leave
 - Scottish/foreign player quotas
 - Colt or Reserve teams in lower leagues
 - A pyramid system
 - Salary caps for players
 - Reduce influence of TV (including cheaper pricing for live games)

how to improve Scottish football

The gate used to be split between teams in the days when Scotland was a credible nation in world football. The Old Firm didn't always win everything so each team could start the season thinking they had a chance to win

Share gate receipts equally across the SPL

Credit all income to a central body for equal distribution between member clubs

We badly need either a reserve league setup in the top division or the creation of colt teams in the lower leagues

how to improve Scottish football

A four or five year go at summer football is the most obvious way to gauge whether there is an increase in attendances and football quality in Scotland

There should be a set price for matches across the league to encourage fans

One main thing needed now is playoffs from the First to the Premier exactly as it works in league two and three

I would let the Old Firm leave without batting an eyelid. All the other 40 should up and off and set-up their own league without them

how to improve Scottish football

I am sick to death of seeing empty seats at games now. Clubs need to make tickets dramatically cheaper for children and concessions. Make it affordable

A pyramid system is a must.

I would like to see more play off games such as play offs for European places and more promotion spots to the top tier

Quotas on foreign players in a squad and minimum numbers of young players named for each match

conclusions (1)

- Support for a 10 team top league has halved in the last year
- There remains a clear preference for larger leagues amongst Scottish football supporters (including Old Firm and other SPL supporters)
- This remains the case even when supporters are presented with the SPL's statement on the need for 4 Old Firm games to maintain broadcasting revenues
- A 16 team league remains the most popular league size with supporters

conclusions (2)

- There is broad support for a pyramid structure, a winter break and a earlier start to the season. Although support has risen for a summer season, opinion on this issue remains divided with a third of fans opposed to such a move
- With the exception of Old Firm fans, there is strong support for distributing central revenues more equally and clear evidence that supporters believe this would increase competition
- There are indications that increased competition would encourage greater attendance particularly amongst those who attend games less regularly and fans of clubs in the First Division and non Old Firm SPL clubs

conclusions (3)

- There remains a very strong belief amongst supporters that they should be consulted on major issues that affect Scottish football
- A national organisation representing fans is viewed as desirable and there is strong support for fans being represented on the Boards of football clubs
- The main priorities identified for the Scottish Football Network focused on representing fan opinion to the football authorities/Government and campaigning for improved rights for fans