

Department of Culture, Arts and Leisure

Soccer Interest in Northern Ireland

June 2004



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Executive Summary

- 1.1 This research, commissioned by the Department of Culture, Arts and Leisure from PricewaterhouseCoopers in February 2004, was prompted by the recognition that there is a lack of baseline information on levels of interest and attendance in relation to Northern Ireland soccer.
- 1.2 The Steering Group for the project included representatives of DCAL, the Sports Council for Northern Ireland, the Irish Football Association, the Irish Football League, the NI Amalgamation of Official Northern Ireland Supporters Clubs and other supporter representatives.
- 1.3 This study provides data on potential target match attendees and an overview of the factors which could be levered to promote and encourage attendance. Its aims are to determine the level of interest in soccer amongst the general public and to identify armchair fans; to examine the reasons why armchair fans do not attend matches in Northern Ireland and the factors which may encourage them to do so; and to explore the extent to which they attend matches in England and Scotland.
- 1.4 A key aim of the research was to provide baseline data for the Northern Ireland Soccer Strategy. If this survey is repeated in three or four years' time, it will reveal whether there has been any improvement in some of the key indicators which could be attributable to the implementation of the soccer strategy.
- 1.5 The basis of this research was a survey of 1,101 households in 55 wards across all 26 District Council areas in Northern Ireland. The sample was representative in regard to age, socio-economic group and community background. The gender quota was skewed towards males to allow sufficient numbers of armchair fans to be interviewed.

Levels of soccer support

- 1.6 After weighting the data to account for the gender imbalance, three categories emerged from this research: the 'not interested' (62%), the 'regulars' (3%) and the 'armchair fans' (35%).
- 1.7 This report describes the characteristics of each of these three groups in terms of gender, age, community background, socio-economic group, disability, children under the age of 16, and marital status.

The Not Interested (62%)

- 1.8 The 'not interested' are those who have not attended a live soccer match in the last 15 years or watched a match on television in the last two years, and/or those who do not actively support a team. They are more likely to be female (43%); over the age of 60, members of the Catholic community; or living in a District Council area with no senior soccer team.

The Regulars (3%)

- 1.9 'Regulars' are those who attend Irish League soccer matches more than six times a season. They are more likely to be male, aged between 16 and 19; from the Protestant community; from socio-economic groups C2DE; and slightly more likely to be single.

Armchair Fans (35%)

- 1.10 Armchair fans are those who follow soccer but do not attend live matches very often, if at all. They are more likely to be male and from the Protestant community. There is little difference by age or socio-economic group. Respondents with children under the age of 16 were slightly more likely to be armchair fans. Armchair fans are more likely to be living in a District Council with one or more teams.
- 1.11 The following findings describe in more detail the activities, views and experiences of these armchair fans.

Soccer activities and behaviour

- 1.12 The research also reveals the soccer-related behaviour of armchair fans in regard to the number and level of teams they support, their match attendance, the ways in which they show their support, time devoted to soccer each week, and their involvement in other activities relating to soccer, such as coaching/managing or playing in a team.
- 1.13 The main points emerging from this part of the research are as follows:
- 58% of armchair fans support one team and 33% two teams;
 - 81% support an English Premiership team, 36% a Scottish League team, and 21% an Irish Football League team;
 - 53% of armchair fans never attend matches, however 8% of those who support an English team, 11% of Scottish team supporters, and 10% of IFL supporters attend their team's matches at least once a month;
 - Watching results on TV is the most common means of supporting a team (95%), followed by reading newspapers' sports sections (84%), and watching matches on TV (82%);
 - Nearly two-thirds of armchair fans surveyed spend up to five hours a week following soccer; and
 - One in ten armchair fans is involved in a team in a capacity other than as a supporter.

Irish Football League and Derry City soccer

- 1.14 The research revealed that most armchair fans (68%) never or rarely attend IFL/Derry City matches while a similar proportion has not attended an international match within the last two years.
- 1.15 The main reasons for non-attendance at IFL matches are as follows:
- A lack of interest in IFL soccer (38%);
 - The standard of play (32%);
 - Work commitments (13%);
 - Watching other football on TV (12%); and
 - The facilities (12%).
- 1.16 The five main factors which would encourage respondents to attend IFL matches are:
- Improvements to the standard of play (59%);
 - Better promotion of IFL soccer (47%);
 - Reducing the occurrence of bad language (46%);
 - Making it more family-friendly (45%); and
 - Reducing sectarianism (43%).

International soccer in Northern Ireland

- 1.17 Respondents were asked which international teams they supported. Half of armchair fans support Northern Ireland and a third support the Republic of Ireland. One fifth of armchair fans support England and a similar proportion did not support an international team at all. Support for the NI team was most prevalent amongst the Protestant community and those aged over 60 years of age.
- 1.18 Those from the Protestant community, younger armchair fans, and males were more likely to have attended a Northern Ireland match in the last two years.
- 1.19 The main reasons for not attending NI matches more often were given as:
- The standard of play (27%);

- Lack of interest in international football (22%);
 - Dislike of bigotry/sectarianism (19%);
 - Recent match results (17%); and
 - Lack of support for the NI team (16%).
- 1.20 A dislike of bigotry and sectarianism appears to be a greater deterrent to attending international matches when compared to Irish League matches (19% compared to 11%).
- 1.21 Armchair fans from Protestant and Catholic backgrounds appear to be discouraged from attending for different reasons. The standard of play (15%) and recent results (23%) were more of a factor for Protestants, while Catholics were less likely to be interested (24%) or support (26%) the NI team and did not like the bigotry/sectarianism (27%).
- 1.22 Factors which would encourage attendance include:
- Improve the standard of play (23%);
 - Improve match results (22%);
 - A new stadium (18%);
 - Reduce the amount of sectarianism at matches (16%); and
 - Make it family friendly/child friendly (14%).
- 1.23 Reducing the amount of sectarianism was more likely to be a factor for ABC1s (21%) and those from a Catholic background (26%).

The image of Northern Ireland soccer

- 1.24 Armchair fans were asked about their opinion of Irish League soccer and their perception of the general public opinion. A similar question was also asked about international soccer.
- 1.25 The percentage that perceived Irish League soccer to be good was low (18%) and over half (53%) responded that the image was poor or very poor. Personal opinion was only slightly more positive than the perception of the opinion of the general public. The image of Northern Ireland soccer was also rated poorly, with 58% regarding it as poor or very poor.

Opportunities in soccer

- 1.26 Respondents were asked whether they thought that there were sufficient opportunities for a number of groups to participate (in whatever way) in soccer in Northern Ireland.
- 1.27 Respondents were least likely to think that there were sufficient opportunities for people with disabilities, women and older people. Those from a Catholic background were less likely to say that there were sufficient opportunities for Catholics (52%).

General comments in relation to soccer in Northern Ireland

- 1.28 Respondents were also invited to provide additional comments on soccer in Northern Ireland. The most common remarks were as follows:
- Training for young people in schools and clubs should be improved;
 - Soccer in Northern Ireland needs better results;
 - Soccer needs better funding;
 - Bigotry, sectarianism, chanting etc should be reduced;
 - Facilities should be improved, and should be more user-friendly; and
 - Greater family involvement should be encouraged.

Key target groups

- 1.29 A number of key armchair fans groups, holding similar views, emerged from this research. These were middle-aged family men; young male Protestants; young male Catholics; women; and people living in areas without an IFL team.
- 1.30 In relation to encouraging greater attendance at soccer matches in Northern Ireland, several trigger points were identified for each of these groups. These points are illustrated in the table overleaf.

	Facilities	Behaviour	Standard of Play	Time	Interest
Middle-aged family man	√	√	√√	√	√
Women	√	√	√		√√
Young Catholic males		√√			√
Young Protestant males	√		√√	√	
People with no IFL team in local area	√		√		√

Conclusions

- 1.31 This survey describes the characteristics of armchair fans in Northern Ireland, highlighting the dimensions on which they vary from the ‘not interested’ and the ‘regulars’. It identifies a number of key target groups within these categories and the key issues and concerns which are most important to them.
- 1.32 The results presented in this report are the main findings of the research. The full, detailed results represent a valuable source of data about the views and behaviour of those interested in soccer. These research findings should also be considered alongside the parallel research into attendance at NI soccer matches undertaken by RES.
- 1.33 Our survey results should be of interest to all those concerned with the future of soccer in Northern Ireland including the Sports Council, the IFA, the IFL, and soccer clubs. In this context, we would make the following recommendations:
- The outcomes of this research should be made available to all those interested in soccer;
 - The results should be used to establish targets against which progress towards the implementation of the soccer strategy can be measured;
 - The IFA and IFL should consider the implications of these results for their marketing strategies in relation to Northern Ireland international football and Irish League soccer and should be invited to prepare an appropriate plan in this regard;

- The survey should be repeated in three or four years' time to establish the changes, if any, which have occurred; and
- Further research should be considered in respect of the views of ethnic minorities on soccer in Northern Ireland.

II Background

Introduction

- 2.1 Speaking in the Northern Ireland Assembly in June 2002, the then Minister for Culture, Arts and Leisure, Mr Michael McGimpsey stated that:

“Football has one of the highest levels of participation of any sport in Northern Ireland. Furthermore, it is an interface game that crosses our society’s divisions. However, it is a sport in serious difficulties, especially at senior level. It faces many problems, including sub-standard grounds, low match attendances, unruly crowd behaviour and financial problems.”

- 2.2 Since the launch of the *Creating a Soccer Strategy for Northern Ireland* initiative in October 2000, considerable work has been undertaken by the Department of Culture, Arts and Leisure (DCAL) to support and promote the development of soccer in Northern Ireland, and in particular to rectify the significant problems outlined above. This work involved the setting up of an Advisory Panel to help guide the development of a strategy for tackling the problems facing local football.
- 2.3 The Advisory Panel Report was published in October 2001 and contained over 150 recommendations, which, in the Panel’s view, would lead to improvements in the standard of football in Northern Ireland.
- 2.4 In response to this report, the Irish Football Association (IFA) produced a Development Plan for the period 2002–2007 to provide a basis for the future of football. This has been endorsed by DCAL and a series of five development plans targeting the areas of governance and administration, club development and management, football development, playing facilities and football academy and youth development have been subject to a recent economic appraisal.
- 2.5 Integral to improving the fortunes of soccer is the need to secure wider support in the community. This in turn is dependent on gaining an understanding firstly, of the level of interest in the sport across the population as a whole, and secondly, an understanding of the attendance behaviours of armchair fans and the reasons underpinning those behaviours.
- 2.6 In previous research undertaken by PwC in 2001, a survey of the general public indicated a high level of interest in the sport. However, of those expressing an interest in soccer, 58% never attended an Irish League football match (21% attended rarely), and 76% of people expressing an interest in football followed an English or a Scottish football team. However, one issue, which became evident from the Economic Appraisals (undertaken by PwC), is the lack of baseline information on levels of interest and attendance.

- 2.7 It is within the context of providing baseline information that this research has been undertaken. Other objectives were to provide an insight into current levels of interest in soccer and in particular, to explore in depth the views and opinions of the armchair fan. This research provides baseline data on potential target match attendees and an overview of the factors which could be levered to promote and encourage attendance.

The terms of reference

- 2.8 The aim of this research project was to examine the level of interest in soccer among the people of Northern Ireland, with a focus on the identification of “armchair” soccer fans and an exploration of their views on the sport. The specific objectives of the research were to:

- Conduct a survey of the general public to determine their level of interest in soccer and identify armchair fans;
- Conduct a survey of armchair fans to determine their views on soccer in Northern Ireland, and in particular;
 - Their reasons for non-attendance at local matches
 - Factors that may encourage them to attend
 - The extent to which they attend matches in England and Scotland
- Develop a methodology to identify armchair fans for follow-up research; and
- Examine potential monitoring arrangements to measure the impact of developments in soccer on armchair fans.

- 2.9 The Steering Group for the project included representatives of DCAL, the Sports Council for Northern Ireland, the Irish Football Association, the Irish Football League, the NI Amalgamation of Official Northern Ireland Supporters Clubs and other supporter representatives. Regular meetings between the Group and the PwC research team were held during the course of this research.

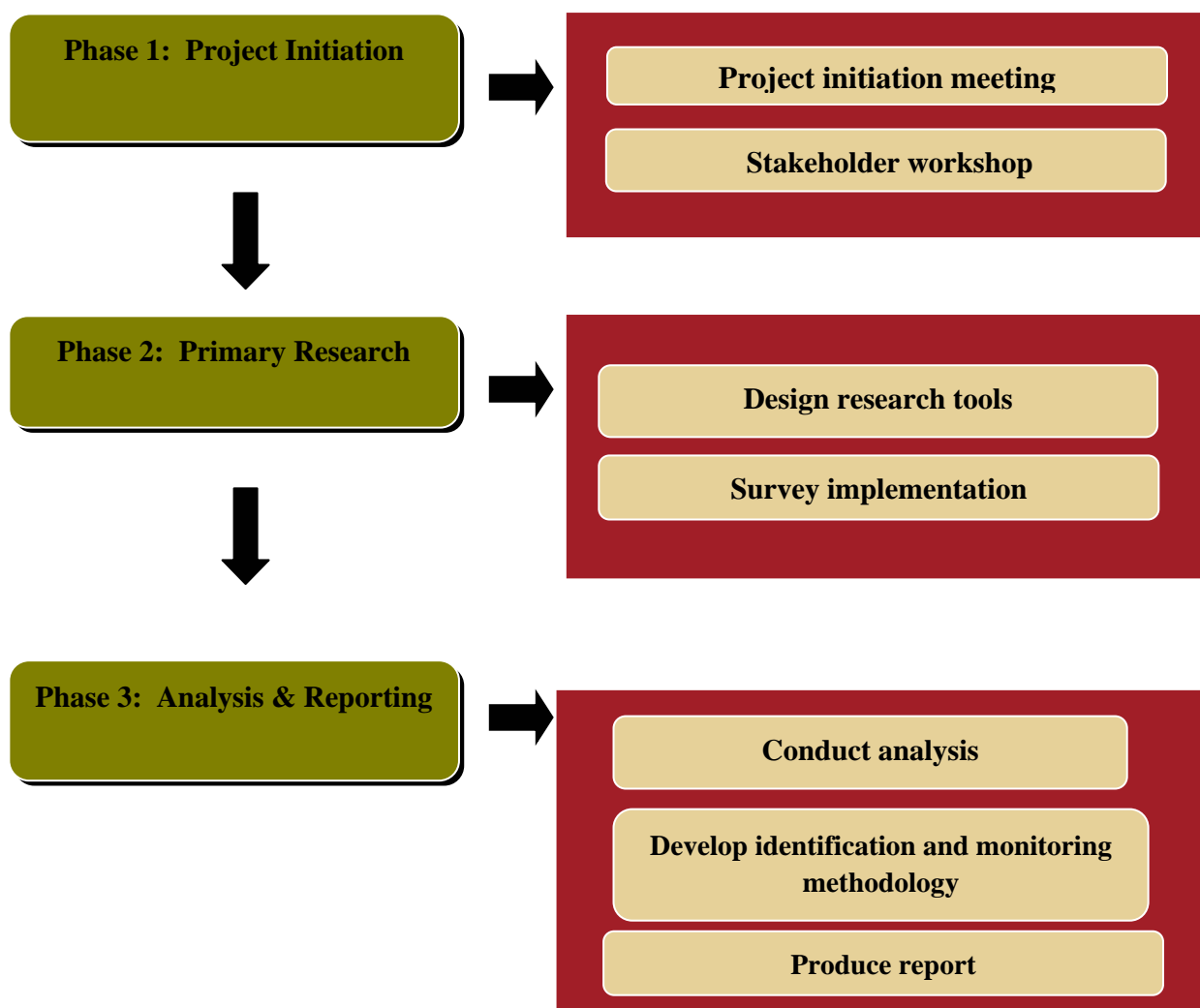
- 2.10 The Department of Culture, Arts and Leisure defines armchair fans as “those interested in soccer but who do not regularly attend Irish league and/or international matches”. For this project we defined armchair fans specifically as:

- Those who have watched a match on television in the last two years; or
- Those who have been to any live football match in the last 15 years; and
- Those who support at least one football team on a regular basis; and
- Those that attend Irish League Football matches less than six times a season.

III Our approach

- 3.1 The following diagram depicts our approach to conducting the research to meet the terms of reference for this project. After an initial planning and design phase, we undertook a face-to-face survey of 1,101 people across Northern Ireland.

Our approach



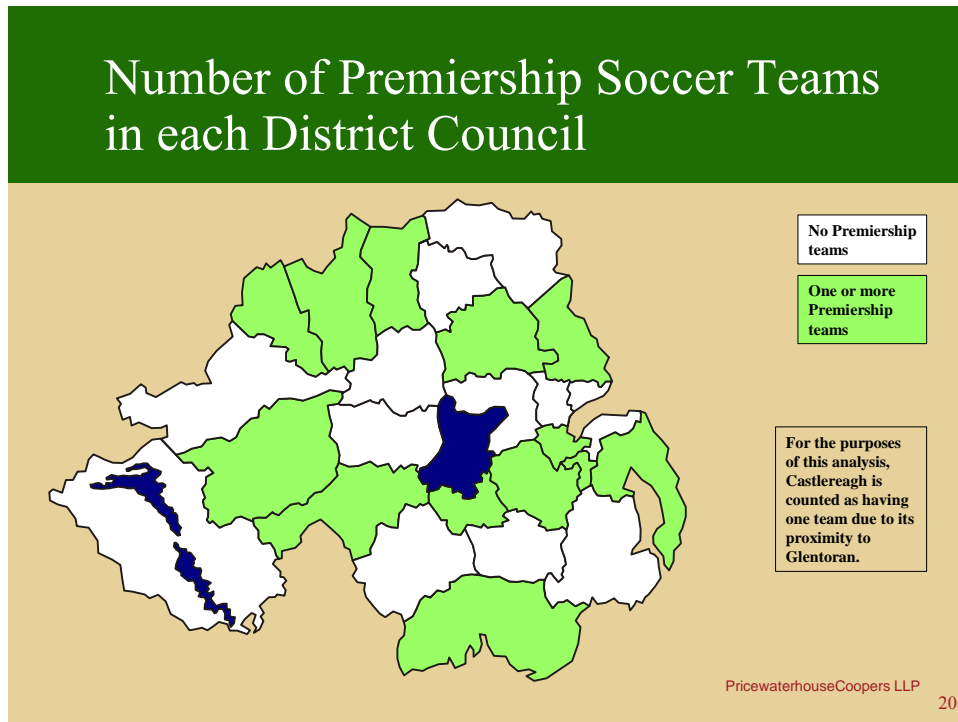
Sample design

- 3.2 The survey of the general public's views on NI soccer covered all 26 District Council areas and was representative of age, religion and socio-economic background. The gender quota was skewed (70% male: 30% female) in recognition of the fact that armchair fans are more likely to be male and that sufficient numbers of armchair fans were required to allow sub-analysis. The table overleaf illustrates the composition of our sample.

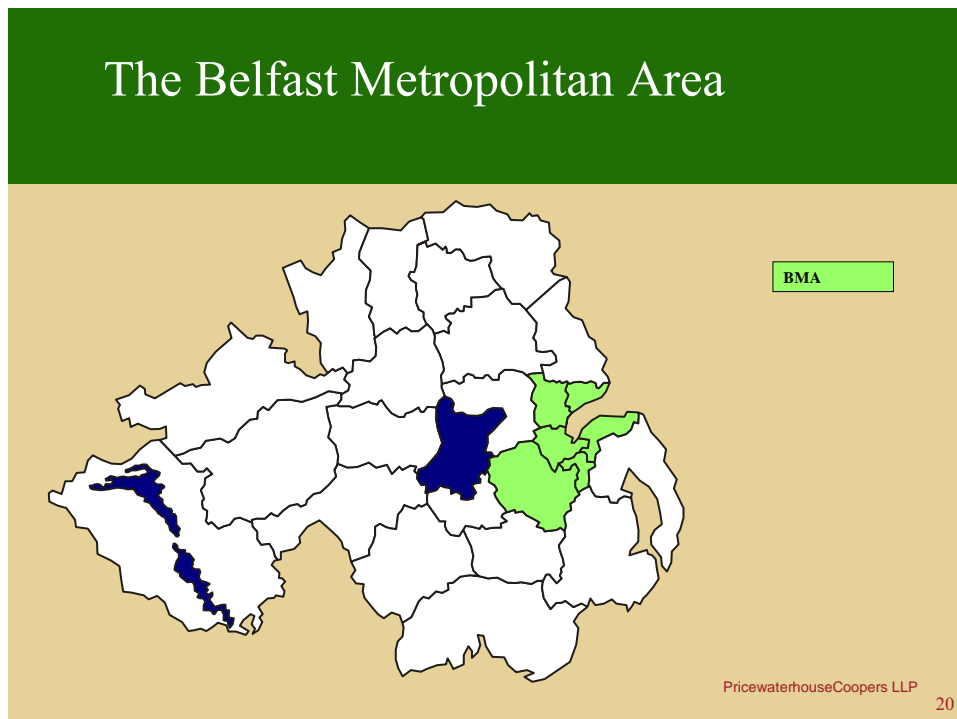
Table 3.1: Who we surveyed			
		NI Population %	Our Survey (n=1101) %
<i>Gender</i>	Male	49	69
	Female	51	31
<i>Age</i>	16-19	8	9
	20-29	19	18
	30-59	52	51
	60+	23	22
<i>Community Background</i>	Protestant	53	50
	Catholic	44	44
	Other/none	3	6
<i>SEG</i>	ABC1	47	39
	C2DE	53	61

Geographical location

- 3.3 Respondents were allocated to a geographical location in three ways, each of which is detailed below.
- 3.4 Firstly, respondents were identified as coming from either an urban or rural location by ward level. As the official classification of wards into urban and rural areas is not yet available, this was done, as far as possible, in line with DCAL practice as outlined in the *Interdepartmental Urban-Rural Definition Group Interim Report* and through the local knowledge of our fieldwork team. Care should therefore be taken in interpreting these results.
- 3.5 Analysis was also carried out on the basis of whether a Premiership soccer team was based in each District Council area. Each area was categorised as having “one or more Premiership teams” or “no Premiership teams”. For the purposes of this research, and after consultation with the Department, Castlereagh was coded as having one senior team, due to its proximity to Glentoran. The distribution of Premiership soccer teams across Northern Ireland is shown on the map overleaf.
- 3.6 Lastly, we analysed the results of the survey by location in terms of the Belfast Metropolitan Area (BMA) and the rest of Northern Ireland. There are six district councils in the BMA: Belfast; Lisburn; Carrickfergus; Newtownabbey; North Down; and Castlereagh.



3.7 In terms of geographic location, 58% of our survey came from areas designated as urban and 42% from rural areas. Almost two fifths (38%) came from Council areas with no senior teams and just over a third (35%) came from the Belfast Metropolitan Area.



Questionnaire design

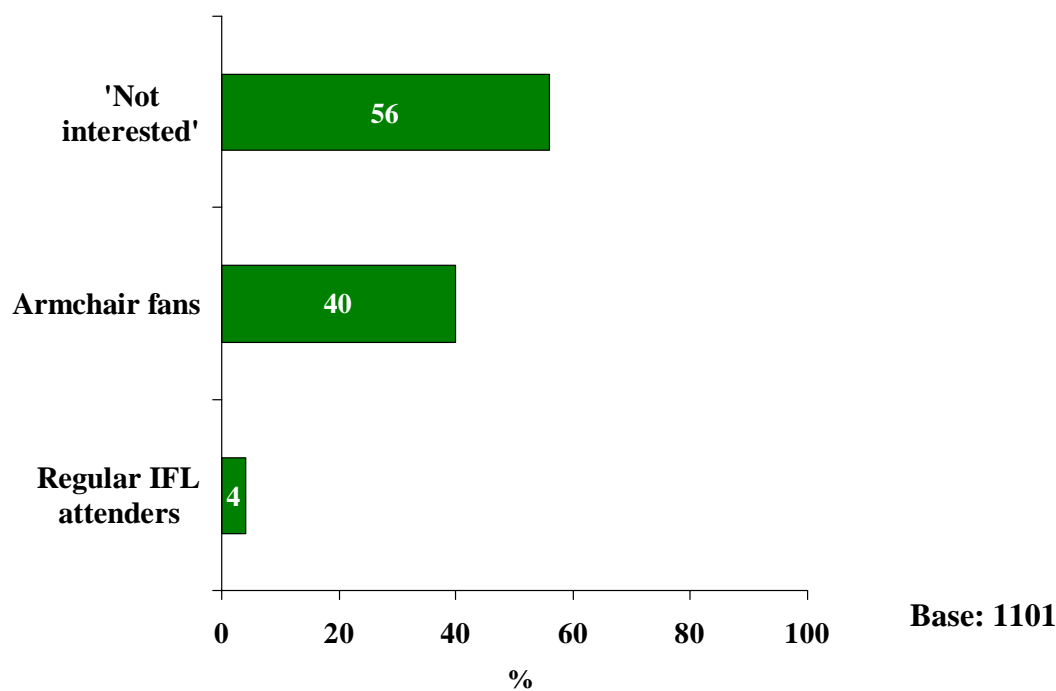
- 3.8 The research instrument was designed in conjunction with the Project Steering Group, chaired by DCAL and including representatives from Northern Ireland soccer. It was also informed by previous research undertaken by PwC in support of the *Creating a Soccer Strategy for Northern Ireland* initiative and its experience in undertaking the Soccer Strategy Component Economic Appraisals. Consultation with RES, undertaking a companion study of the views of fans at IFL matches, ensured that certain questions could be compared across surveys.
- 3.9 Four filter questions were used to distinguish between those with some interest in soccer, those with no interest and those who are regular attendees at IFL or Derry City FC matches. Other questions addressed armchair fan behaviour; views on Irish League soccer and soccer grounds, support for international soccer in Northern Ireland; and the overall image of the sport. Key issues included:
- The reasons why armchair fans do not attend local matches; and
 - Factors that may encourage them to attend.
- 3.10 The main findings from the survey are presented in the sections which follow.

IV Key findings

The 'Not Interested', the 'Regulars' and the 'Armchair Fans'

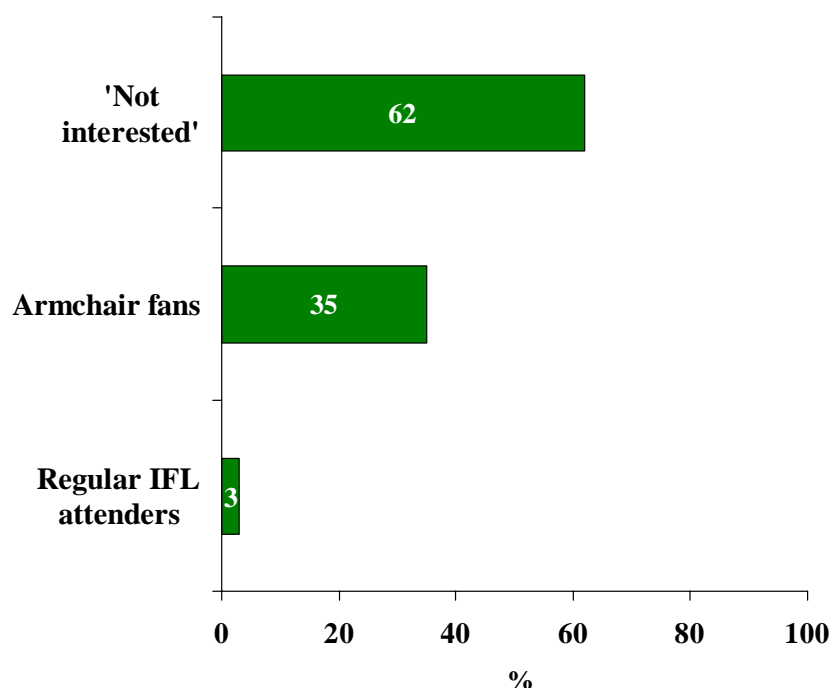
- 4.1 One of the objectives of this research was to determine the level of interest in soccer in Northern Ireland. Using four filter questions, three distinct groups were identified: the 'not interested'; the 'regulars'; and 'armchair fans'.
- 4.2 Just over half of those interviewed were not interested in soccer and 4% were regular attending fans of Irish League (or Derry City) football. Therefore 40% of the sample was composed of armchair fans. The chart below illustrates the composition of our sample in relation to these three categories.

Figure 4.1: The 'Not Interested', the 'Regulars' and the 'Armchair Fans' (Unweighted)



- 4.3 Given that the sample design was skewed towards males to ensure sufficient representation of 'armchair fans', a more accurate profile of the soccer interest of the Northern Ireland population is required to allow for the under representation of females. The chart overleaf reveals that, when the data is weighted to allow for the under representation, 62% of the population are not interested in football, 3% are regular fans and 34% are classified as armchair fans.

Figure 4.2: The 'Not Interested', the 'Regulars' and the 'Armchair Fans' (Weighted)



Characteristics of the 'Not Interested'

- 4.4 The tables below contrast the characteristics of those 'not interested' in soccer with the wider sample. It can be seen that, as may be expected, the 'not interested' group are more likely to be female. While 31% of the sample was female, this group represents 43% of those not interested. Little difference in age and socio-economic group emerged, however there is a difference by religion. Members of the Catholic population are more likely to be part of the 'not interested' (48% compared to 44% of population) and Protestants are less likely to be part of this group (45% compared to 50% in the population).

Table 4.1: Characteristics of the 'Not Interested' group			
		Our Survey (n=1101) %	The 'Not Interested' (n=619) %
Gender	Male	69	57
	Female	31	43
Age	16-19	9	8
	20-29	18	16
	30-59	51	51
	60+	22	25
Community Background	Protestant	50	45
	Catholic	44	48
	Other/none	6	6
SEG	ABC1	39	40
	C2DE	61	60

- 4.5 We also compared the ‘not interested’ group with the wider sample in relation to other demographic variables, including disability, marital status, and incidence of having children under the age of 16 (see Table 4.2 below). No significant difference between the two groups emerged on any of these dimensions.

Table 4.2: Characteristics of the ‘Not Interested’ group

		Our Survey (n=1101) %	The ‘Not Interested’ (n=619) %
People with a disability	Yes	8	10
People with children under 16	Yes	34	32
Marital status	Single	33	31
	Married	54	55
	Separated/ Widowed/ Divorced	13	13

The ‘Regulars’

- 4.6 ‘Regulars’ were defined as those who attended Irish League Football or Derry City matches seven or more times a season. Table 4.3 overleaf contrasts the characteristics of the ‘Regulars’ with the wider sample. Care should be taken in interpreting these results from this table as only 42 people interviewed were regular attendees. The RES survey will provide more reliable data on this group.
- 4.7 From this table it can be seen that the number of females attending Irish League/Derry City football regularly is low (12%). Those aged 16 to 19 are more likely to attend when compared to the sample profile. The 30-59 year old group is less likely to attend (and this is the group most likely to have children under the age of 16). There is an under representation of Catholics who regularly attend Irish League/Derry City football compared to their representation in the population. The converse of this is the over representation of Protestants compared to the population. It has been said that soccer is the sport of the ‘working class’ and this is borne out in our survey with an over representation of those from socio-economic groups C2DE compared to the population.

		Our Survey (n=1101) %	The 'Regulars' (n=42) %
Gender	Male	69	88
	Female	31	12
Age	16-19	9	19
	20-29	18	17
	30-59	51	45
	60+	22	19
Community Background	Protestant	50	62
	Catholic	44	38
	Other/none	6	0
SEG	ABC1	39	31
	C2DE	61	69

- 4.8 We also compared the 'regulars' with the wider sample in relation to other demographic variables, including disability, marital status, and children under the age of 16 (see Table 4.4 below). There was a small difference in marital status in that single people were slightly more likely to attend regularly.

		Our Survey (n=1101) %	The 'Regulars' (n=42) %
People with a disability	Yes	8	7
People with children under 16	Yes	34	29
Marital status	Single	33	38
	Married	54	55
	Separated/Widowed/ Divorced	13	7

The 'Armchair Fans'

- 4.9 There were 440 armchair fans in the survey. Tables 4.5 and 4.6 reveal the main characteristics of this group. Again, as might be expected, men are more likely than women to be armchair fans – this is related to the fact that women are less interested in soccer overall. There is little difference overall when age and socio-economic group are compared against the population.

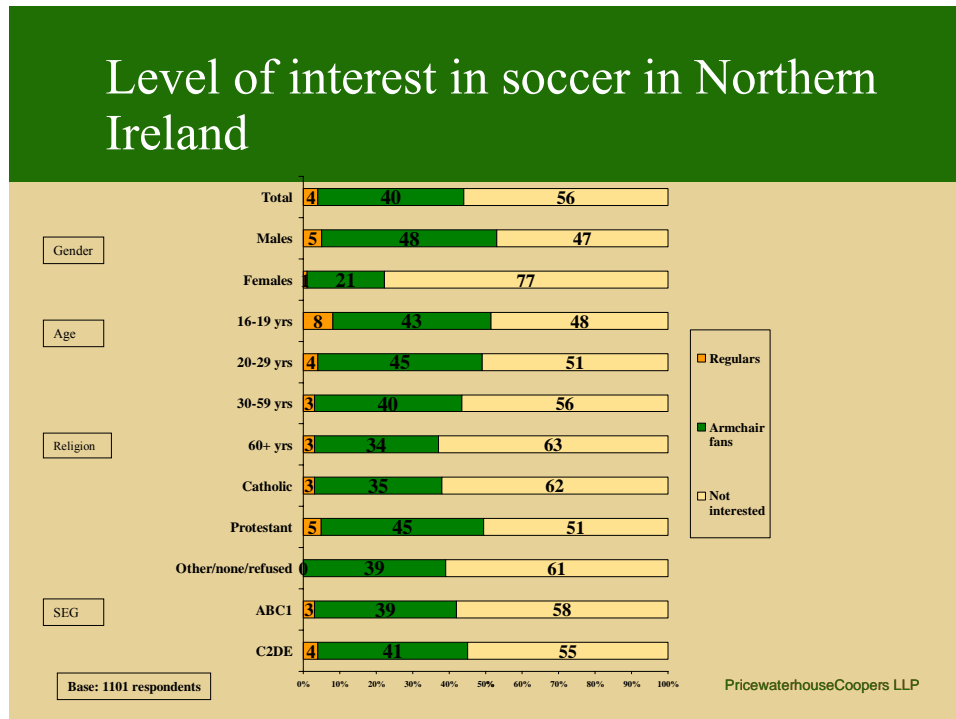
- 4.10 However, when religious background is examined, Catholics are less likely to be armchair fans. Again this links back to their higher levels of disinterest in soccer overall.

		Our Survey (n=1101) %	The 'Armchair Fans' (n=440) %
Gender	Male	69	83
	Female	31	17
Age	16-19	9	10
	20-29	18	20
	30-59	51	51
	60+	22	19
Community Background	Protestant	50	56
	Catholic	44	38
	Other/none	6	6
SEG	ABC1	39	38
	C2DE	61	62

- 4.11 We also compared the 'armchair fans' with the wider sample in relation to other demographic variables, including disability, marital status, and children under the age of 16 (see Table 4.6 below). No difference between the two groups emerged on any of these dimensions, with the exception of "children under the age of 16". On this dimension, those with children were slightly more likely to be armchair fans than the sample.

		Our Survey (n=1101) %	The 'Armchair Fans' (n=440) %
People with a disability	Yes	8	6
People with children under 16	Yes	34	38
Marital status	Single	33	35
	Married	54	53
	Separated/Widowed/ Divorced	13	12

- 4.12 The chart overleaf provides a demographic overview of these three groups.



4.13 Previous research by PwC, undertaken for the Office of the First Minister and Deputy First Minister in 2002¹, revealed that 64% of those surveyed had some interest in sport. Nearly twice as many females than males (50%) had a complete lack of interest in sport. Younger people (aged between 18 and 24 years of age) demonstrated the highest level of interest. In this research, soccer emerged as the most popular sport in Northern Ireland (30%) followed by Gaelic football (8%) and golf (6%). In addition, males were almost three times more likely to be interested in soccer than females.

¹ Sectarianism in Sport (PwC, 2002)

Geographical variations

4.14 The differences in levels of interest by geographic location are presented in the table below.

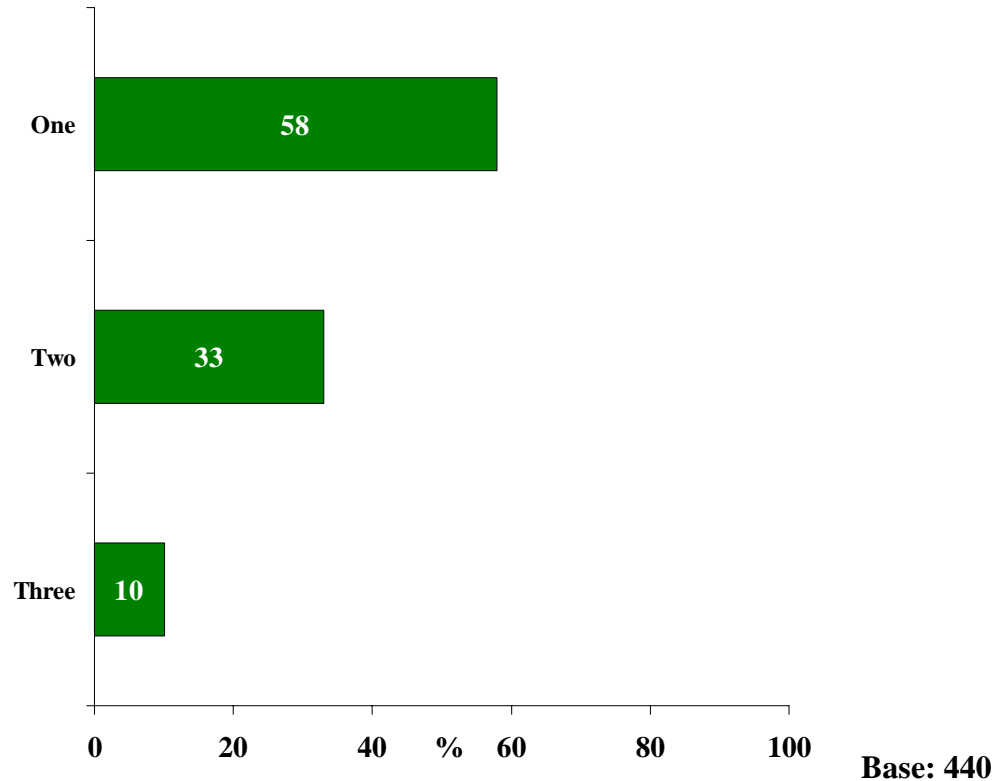
	Urban/rural		No of Premiership teams		BMA		Survey
	Urban	Rural	No teams	1+ teams	BMA	Non BMA	%
	%	%	%	%	%	%	
The 'not interested'	55	58	61	53	53	58	56
Armchair fans	42	38	36	42	42	39	40
Regulars	4	4	2	5	4	4	4

4.15 It can be seen from the above that respondents in urban areas are slightly more likely to be interested in soccer and to be armchair fans. Respondents from Council areas without a Premiership soccer team are more likely to be "not interested" (61%). Respondents outside the Belfast Metropolitan Area are also slightly more likely to be less interested.

The behaviour of the 'Armchair Fans'

4.16 The primary focus of this study is the views, behaviour and experiences of armchair fans. The following sections present the findings on the teams that the armchair fans support, how they support them, the time they spend supporting them and their views on Irish League and Northern Ireland international soccer.

4.17 Figure 4.3 overleaf represents the number of football teams supported. No respondents to the survey supported more than three teams.

Figure 4.3: Number of teams supported

- 4.18 The chart demonstrates that support of football is not limited to one team, with 43% supporting two or more teams. As might be expected, the vast majority of armchair fans (81%) support a team in the English League. Most of these teams are in the Premiership, with Manchester United being the most popular team.
- 4.19 A lot of support is given to Scottish football, and Rangers and Celtic in particular. This is borne out in the results of our survey with 36% of armchair fans supporting a Scottish team.
- 4.20 Approximately one fifth (21%) report that they support a team in the Irish League and almost 2% of armchair fans said that they supported Derry City Football Club.
- 4.21 The table overleaf provides details of the level of team supported.

	1 st team (n=440) %	2 nd team (n=176) %	3 rd team (n=42) %
English Football League	71	34	26
Scottish Football League	18	47	12
Irish Football League (IFL)	10	19	43
Football Association of Ireland League (FAI)	1	0	14

- 4.22 There is a sizeable proportion of armchair supporters who rarely or never go to watch their team – 71% of those who support an English team, half of those who support a Scottish team, and 38% of those who support an Irish League team. Overall, 53% of armchair fans never or rarely attend any matches.
- 4.23 At the other end of the scale, there are some dedicated fans with 8% of those who support an English side, 11% of those who support a Scottish side and 10% of those who support an Irish League side attending their team's matches at least once a month.
- 4.24 The table below illustrates the attendance patterns of armchair fans.

	English League (n=383) %	Scottish League (n=164) %	Irish League (n=44) %
At least once a week	3	2	<i>not part of survey</i>
1-3 times a month	5	9	10
A few times a year	21	38	50
Less often	34	24	22
Never	37	26	16

NB. These bases include fans that support more than one team in the respective league.

- 4.25 We also examined the geographical pattern of support for English, Scottish and IFL teams. The table below illustrates the level of support for teams in each league in relation to urban/rural location, whether there is a Premiership team in the respondent's District Council Area, and whether the respondent lives in the BMA area or not.

Table 4.10: Teams supported by geographical location							
	Urban/rural		No of Premiership teams		BMA		Survey
	Urban %	Rural %	No teams %	1+ teams %	BMA %	Non BMA %	%
IFL	21	21	16	24	19	23	21
English League	82	80	78	83	86	79	81
Scottish League	34	39	33	37	31	39	36

- 4.26 The table above demonstrates that support for IFL teams is lowest in Council areas with no IFL Premiership teams. Support also tends to be slightly higher outside the BMA area. People in areas with no Premiership teams are also slightly less likely to support teams from the English Premiership (78%) compared to 83% of people in areas with a team. There is slightly more support for Scottish teams in rural areas.
- 4.27 The survey also examined the other methods that armchair fans use to support their favourite team or teams.
- 4.28 The table overleaf illustrates that watching the results on television is the most used method, followed by reading the sports section of the newspaper, watching matches on television and reading the results on Ceefax or Teletext. The radio was also a popular medium for obtaining results and listening to matches. Less popular were club information lines, text messaging and the Internet.

Table 4.11: Q2d How else do you support your teams?						
	1 st Team		2 nd Team		3 rd Team	
	At least once a week	1-3 times a month	At least once a week	1-3 times a month	At least once a week	1-3 times a month
	%	%	%	%	%	%
Watch their matches on television	47	35	32	39	33	17
Watch their results on television	76	19	67	23	67	17
Listen to their matches on radio	29	21	17	20	12	24
Listen to their results on radio	39	22	30	21	36	17
Read newspapers' sport sections	73	11	68	15	60	21
Read about the team on the Internet	13	9	13	6	7	5
Participate in Internet fora	3	3	1	2	2	5
Call club info lines	2	2	1	1	2	5
Use text messaging services	8	3	6	4	2	2
Read about on teletext or Ceefax	40	19	40	16	24	24
Attend supporters' club events	2	8	3	5	10	10

Base: 440

Base: 176

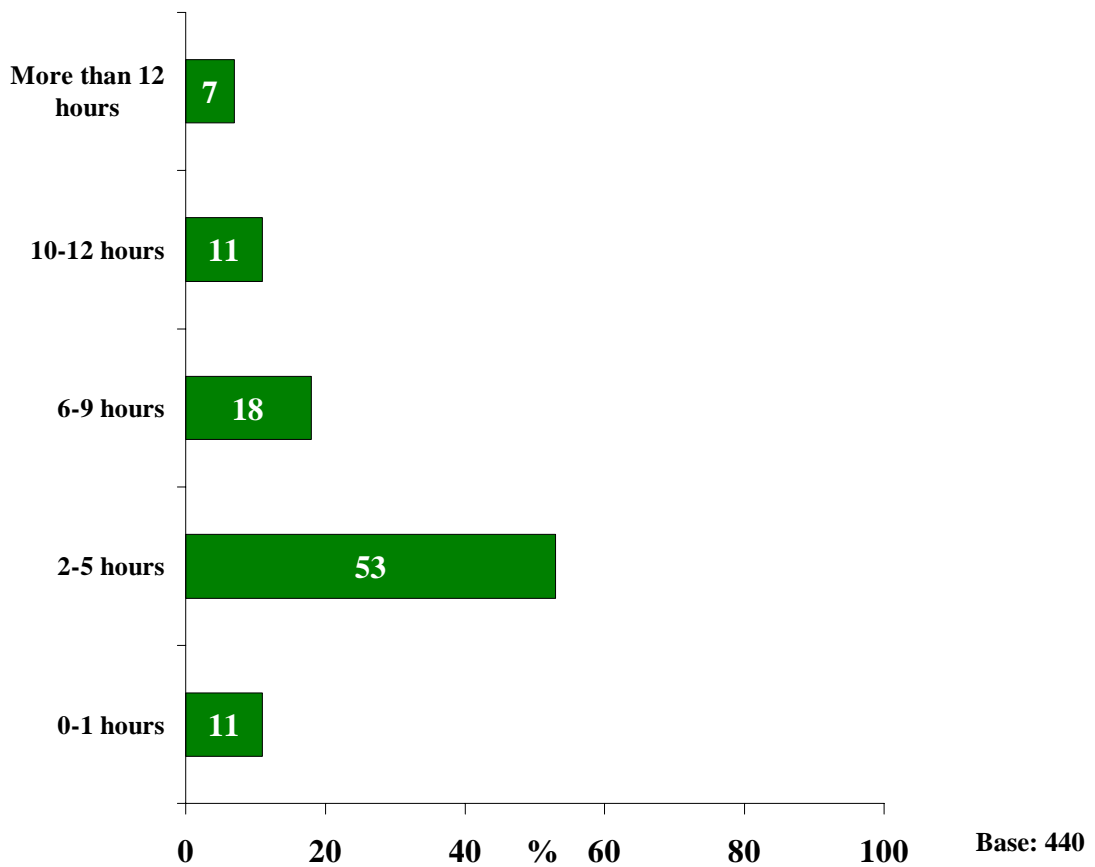
Base: 42

4.29 Respondents tended to be less active in their support of second and third teams; however the pattern of support remained similar to that of the first team supported.

Hours spent following soccer each week

- 4.30 Most supporters (64%) spend up to five hours a week following football (this doesn't include playing or managing a team).
- 4.31 Female armchair fans tend to be less avid supporters and spend less time following their teams compared to males. There are few differences across other key demographics.

Figure 4.4: Number of hours a week spent following soccer



- 4.32 The tables overleaf present the number of hours spent per week by socio-economic group and by geographic location.

Table 4.12: Hours spent following soccer by socio-economic group

	ABC1 (%)	C2DE (%)	Survey (%)
0-1 hours	11	10	11
2-5 hours	54	53	53
6-9 hours	18	18	18
10-12 hours	11	11	11
More than 12 hours	5	8	7

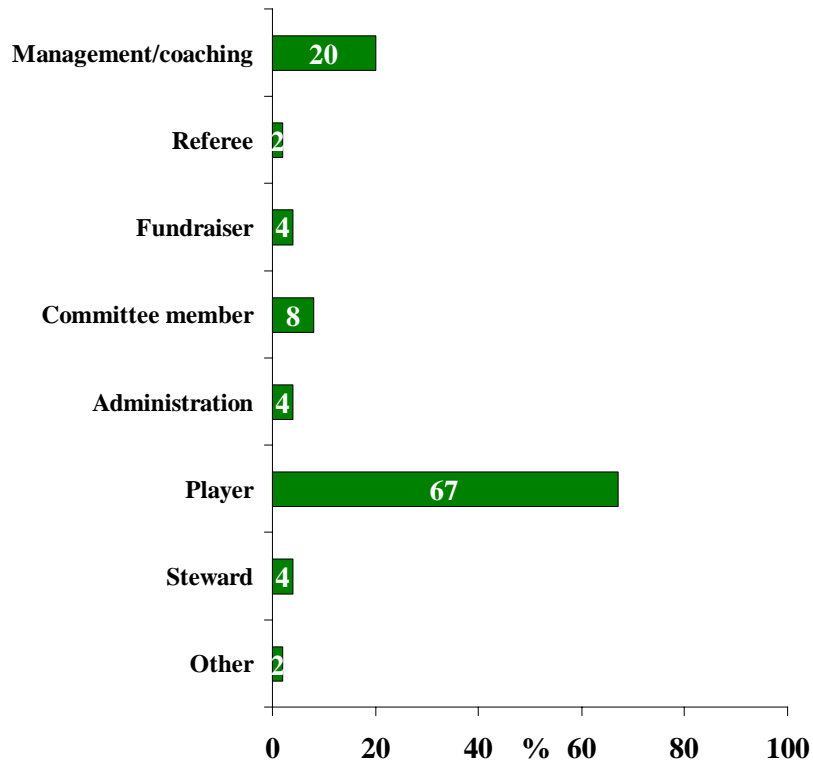
- 4.33 There is no real difference in the number of hours spent following soccer by socio-economic group. In terms of the geographic location of the respondent, the table below demonstrates that people in rural areas are more likely to spend more than 10 hours per week following soccer than those in urban area (29% compared to 10%) and that people outside the BMA are also likely to spend longer following soccer (22% follow for more than 10 hours per week compared to 10% in the BMA).

Table 4.13: Number of hours spent following soccer by geographical location

	Urban/rural		No of Premiership teams		BMA		Survey
	Urban %	Rural %	No teams %	1+ teams %	BMA %	Non BMA %	%
0-1 hours	15	4	11	11	19	6	11
2-5 hours	57	47	49	55	54	53	53
6-9 hours	17	20	22	16	17	19	18
10-12 hours	6	18	15	9	5	14	11
More than 12 hours	4	11	4	9	5	8	7

Other activities relating to soccer

- 4.34 The chart overleaf illustrates the percentage of armchair fans who are involved in soccer in ways other than as a supporter.

Figure 4.5: Incidence of undertaking other activities relating to soccer

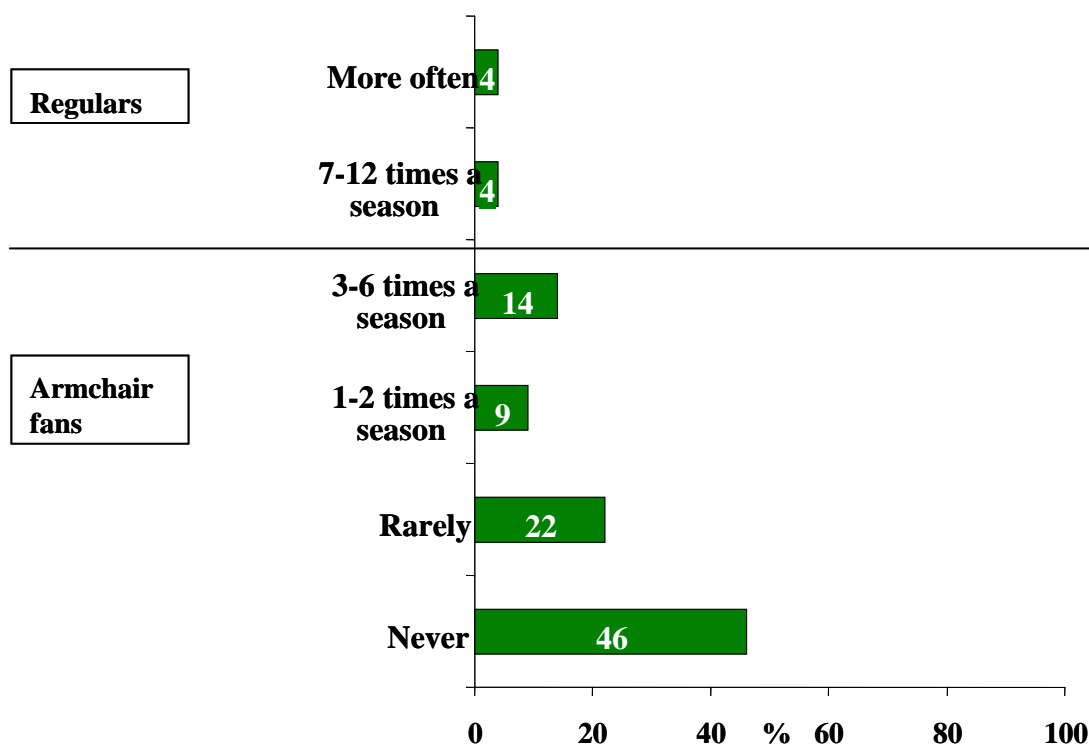
Base: 49

- 4.35 It can be seen that one in ten of armchair supporters are involved with a team other than as a supporter. Two thirds of these are players with another 20% involved in the coaching/management side of football.
- 4.36 Many of these people take on more than one role within their club.

V Irish Football League soccer

- 5.1 This section of the report examines the attitudes of armchair fans towards Irish Football League soccer. Respondents were also asked about their experiences in relation to Derry City Football Club, however supporters of this team represent less than 2% of the sample. The comments below will therefore, for reasons of conciseness, refer to IFL soccer but it should be remembered that they also encompass Derry City.
- 5.2 It was noted above that 482 out of 1,101 respondents to the survey were either armchair fans or regular attendees. The latter, i.e. those that attend IFL matches more than seven times a season, were screened out of this research as they are being surveyed through work conducted by RES. They represent 8% of Irish League supporters.
- 5.3 The chart below reveals the pattern of attendance at IFL matches.

Figure 5.1: Frequency of attending Irish League/Derry City matches



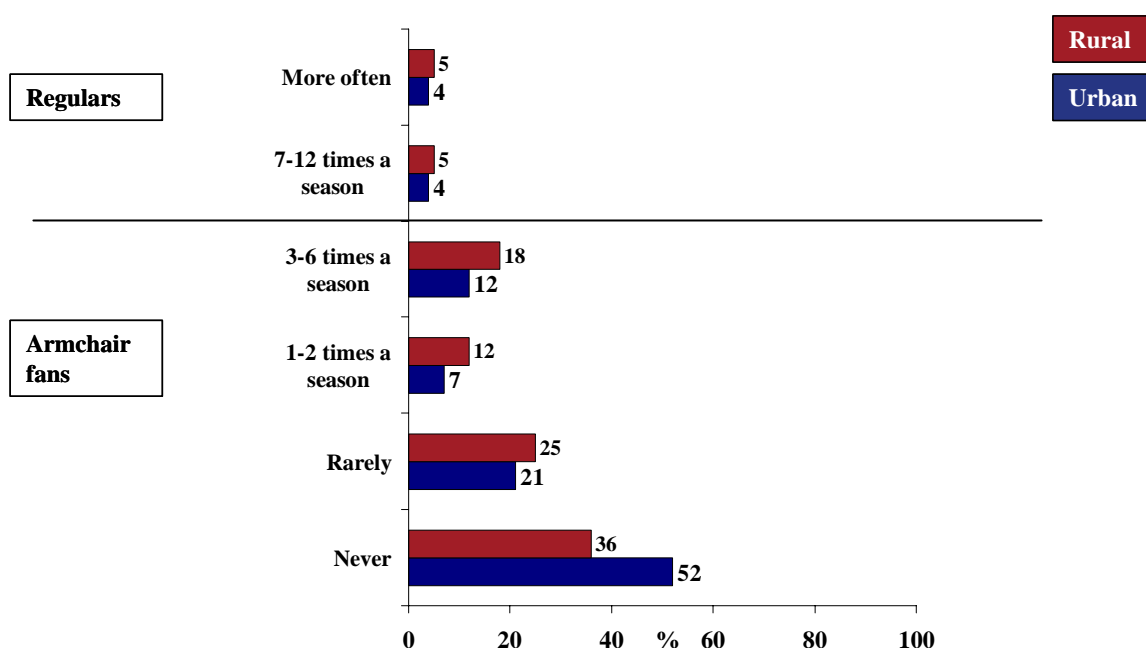
Base: 440

- 5.4 The key point emerging from this chart is that almost half (46%) of those that are defined as armchair fans never attend IFL football matches and a further 22% rarely go to these matches.

Attendance at IFL matches by location

- 5.5 The chart below illustrates the differences in attendance between respondents from rural and urban locations. Respondents from rural locations are slightly more likely to attend IFL matches more frequently than those from urban locations.

Figure 5.2: Frequency of attending Irish League/Derry City matches by geographic location



- 5.6 Similarly, respondents in the BMA are more likely to go to an IFL match “never” or “rarely” than people from outside the area (77% compared to 63%). In District Council Areas with no IFL Premiership teams, 70% of respondents stated they attended “rarely” or “never” compared to 67% of respondents in areas with one or more team.

Reasons for not attending more often

- 5.7 As Table 5.1 illustrates, the main reason given for not attending IFL matches more often was a lack of interest in IFL soccer. Those that gave this reason are more likely to be the younger fans aged under 30 (42%-44%), females (63%) and those from a Catholic background (46%).
- 5.8 Another important reason for not attending more often was the standard of play. Competition from football on television, work and family commitments also affected instance of attendance.

- 5.9 Interestingly, 10% mentioned that they did not go more often because their friends and family were not interested and 7% considered the experience not to be family friendly.
- 5.10 One in ten (11%) cited sectarianism as their reason for not going more often and this view was slightly more prevalent among those from a Catholic community background (15%).

	Count	%
I'm not interested in IFL football	166	38
I don't like the standard of play	140	32
Work commitments	59	13
Watching other football on TV	52	12
Do not like the facilities	51	12
I don't like bigotry/sectarianism	47	11
None of my friend/family go to matches	43	10
The timing of matches doesn't suit me	41	9
Family commitments	40	9
It's not family friendly/child friendly	29	7

Base: 440

Factors which would encourage attendance

- 5.11 Respondents were requested to rate the importance of a number of factors which may encourage attendance. The table overleaf presents the factors rated as "very important".

Table 5.2: What would encourage you to attend Irish League soccer more often?		
Armchair fans who thought it “very important” to...		
	Count	%
Improve facilities generally	146	40
Improve the seating facilities	128	35
Improve the toilet facilities	149	41
Improve the catering facilities	99	27
Improve the standard of play	214	59
Reduce admission prices	105	29
Make it more family friendly	164	45
Changes to the match times	65	18
Improve the standard of refereeing	77	21
Reduce the amount of sectarianism	157	43
Reduce the amount of hooliganism	159	44
Reduce the amount of racism	138	38
Reduce the amount of bad language	167	46
Better promotion of IFL soccer	172	47

Base: 364

- 5.12 Improving the standard of play was viewed as the major factor in encouraging increased attendance.
- 5.13 This was followed by ‘better promotion of IFL soccer’, making it more family friendly and reducing the amount of hooliganism and sectarianism. Of less concern was the standard of refereeing and match times.
- 5.14 Nearly a fifth (17%) reported that they would not attend Irish League Football under any circumstance. The main reasons given were lack of interest, the standard of play, and health reasons.

Involvement of clubs with fans and the local community

- 5.15 Respondents were asked to rate the level of involvement of IFL clubs and the local communities. These questions were also asked in the RES survey of regular attendees.

Table 5.3: Q5a What is your view on the level of involvement of IFL clubs with fans? Would you say...		
	Count	%
Clubs have enough involvement	79	18
Clubs are not involved enough	181	41
Clubs are involved too much	6	1
Don't know	174	40

Base: 440

- 5.16 The table above shows that 41% of armchair fans believe that local clubs should have more involvement with fans. There was also a large proportion of respondents who stated “don’t know”. Young people (those aged under 20) were more likely to state that clubs should be more involved with fans.
- 5.17 Slightly more respondents (45%) stated that clubs should have more involvement with their local community. There was little difference in opinion across the key demographic groups.

Table 5.4: Q5b What is your view on the level of involvement of IFL clubs with the local community? Would you say...		
	Count	%
Clubs have enough involvement	72	16
Clubs are not involved enough	198	45
Clubs are involved too much	4	1
Don't know	166	38

Base: 440

Times of matches

- 5.18 The most popular time for matches was given as the current arrangement, i.e. Saturday afternoon (30% of responses). Sunday afternoon (11%) and Friday evening (10%) were the next most popular options. A large percentage (43%) expressed no preference.

Table 5.5: Q6a At what time would you prefer IFL matches to be played		
	Count	%
Saturday morning	29	7
Saturday afternoon	134	30
Saturday evening	20	5
Sunday morning	5	1
Sunday afternoon	48	11
Sunday evening	7	2
Monday evening	3	1
Tuesday evening	7	2
Wednesday evening	40	9
Thursday evening	4	1
Friday evening	42	10
No preference	188	43

Base: 440

5.19 Reasons for these choices are provided in the table below.

Table 5.6: Q6b Why do you say that?		
	Count	%
It suits my work pattern	88	20
It suits family life	77	18
I've got other things to do on a Saturday	48	11
I watch football on TV	36	8
I'm not interested in IFL football	25	6

Base: 440

5.20 In this context, it should also be remembered that 18% of armchair fans said that a changes to match times was "very important" in order to encourage attendance.

5.21 Armchair fans were also asked about their views on league matches played in the summer and the introduction of a winter break. The tables below illustrate their views on how such changes would impact on their attendance.

Table 5.7: Q6c If games were played in the summer, how would it affect your attendance?		
	Count	%
Not attend	105	24
Be less likely to attend	26	6
Be more likely to attend	138	31
Would attend	36	8
Unsure	134	30

Base: 439

Table 5.8: Q6d If there was a winter break in Northern Ireland soccer, how would this affect your attendance?		
	Count	%
Not attend	127	29
Be less likely to attend	21	5
Be more likely to attend	96	22
Would attend	29	7
Unsure	165	38

Base: 438

5.22 A large proportion of respondents replied that they were unsure of the impact of these changes on their attendance. Almost a third stated that they more likely to attend in the summer and just over a fifth were in favour of a winter break.

Hooliganism, sectarianism, racism and offensive language

- 5.23 Over two thirds of armchair supporters who had been to an IFL match in the last two years consider that there was at least some hooliganism and sectarianism at Irish League matches. Experience of racism appears to be less prevalent although only one of our respondents was from an ethnic minority. Almost half (43%) considered that there was 'a lot' of offensive language at IFL matches.

Table 5.9: Q7 Experiences of hooliganism, sectarianism, racism and offensive language at IFL matches

	Hooliganism		Sectarianism		Racism		Offensive language	
	Count	%	Count	%	Count	%	Count	%
A lot	24	14	22	13	10	6	75	43
Some	50	29	53	30	16	9	25	14
A little	50	29	49	28	41	24	41	24
Not at all	48	28	48	28	105	60	30	17

Base: 174

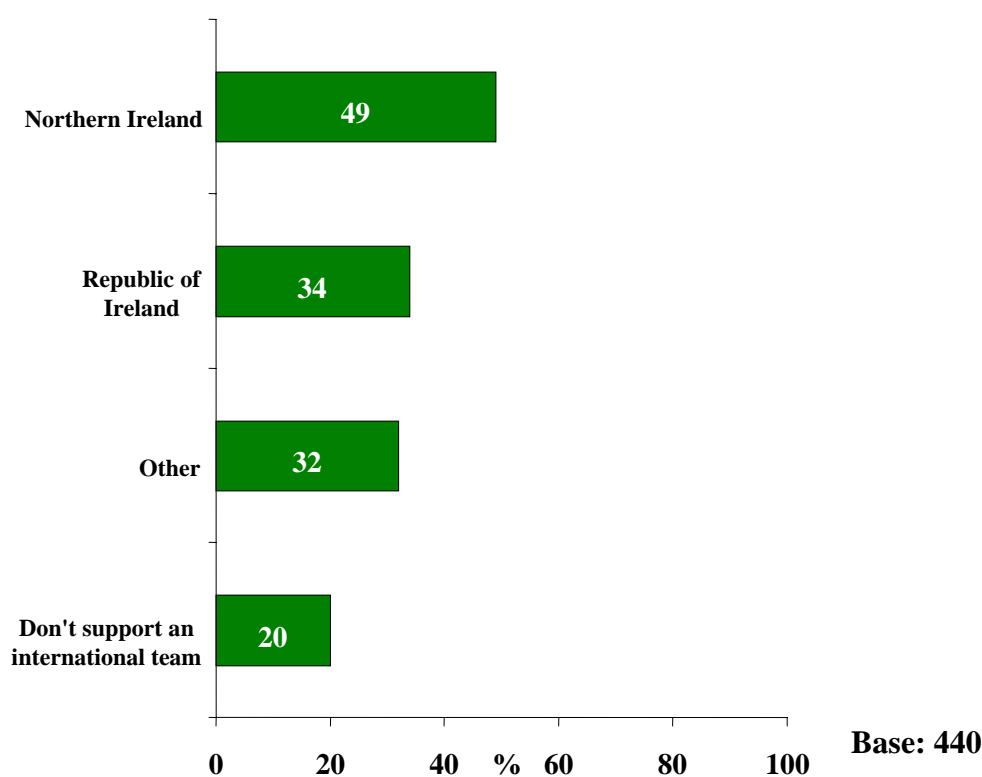
VI International soccer in Northern Ireland

6.1 The third section of the questionnaire addressed issues surrounding international soccer.

Support for international teams

6.2 The chart below illustrates the pattern of support for international teams in Northern Ireland.

Figure 6.1: Which international team or teams do you support?



6.3 The key finding from this data is that one in five armchair supporters does not support any international team.

6.4 Half of our armchair supporters support Northern Ireland and a third support Republic of Ireland. Support for the Northern Ireland team is more likely to come from the Protestant community and those aged over 60. 'Other' includes England (20%), Scotland (8%) and Wales (2%).

6.5 Those from the Protestant community, younger armchair fans, and males were more likely to have attended a Northern Ireland match in the last two years.

6.6 The table overleaf illustrates levels of attendance.

	Total	Religion		Age				Gender	
	(%)	Protestant (%)	Catholic (%)	16-19 (%)	20-29 (%)	30-59 (%)	60+ (%)	Male (%)	Female (%)
Never	67	59	77	58	70	67	67	63	88
1-2 times	24	33	14	23	19	23	31	26	11
3-5 times	8	7	8	16	9	8	1	9	1
6-9 times	1	1	1	2	0	1	0	1	0
10+ times	1	1	1	0	1	1	0	1	0

Reasons for not attending more often

- 6.7 The table below contains the main reasons provided for infrequent or non-attendance.

	Count	%
I don't like the standard of play	116	27
I'm not interested in international football	94	22
I don't like bigotry/sectarianism	82	19
Recent match results	75	17
I don't support the NI team	68	16
I don't like the facilities	54	12
It's not family friendly/child friendly	43	10
None of my friend/family go to matches	41	9
The timing of matches doesn't suit me	40	9
I don't like hooliganism	27	6
I don't feel safe at Windsor Park	27	6
I don't like offensive language	26	6

Base: 440

- 6.8 Standard of play was the main factor in armchair supporters not attending international matches more often (27%). In addition, 17% reported that they did not attend more often because of the recent match results. This was followed by a lack of interest in this type of football (22%).
- 6.9 Bigotry and sectarianism appear to be a bigger deterrent to attending international matches when compared to Irish League matches (19% compared to 11%).

- 6.10 The facilities discouraged 12% of respondents from attending more often. And again the family friendly theme emerged with 10% considering that matches are not family friendly and stating that their friends and family do not go to matches.
- 6.11 Fans from Protestant and Catholic backgrounds were likely to be discouraged from attending for different reasons. Standard of play (15%) and recent results (23%) were more important factors for Protestants, while Catholics were less likely to be interested (24%) or support (26%) the NI team. In addition, a larger proportion of Catholics stated that they did not like the bigotry/sectarianism (27%).

Factors which will encourage attendance

- 6.12 The table below lists the factors, in order of frequency, suggested by armchair fans to encourage attendance.

Table 6.3: What would encourage armchair fans to attend NI matches more often?		
	Count	%
Improve the standard of play	102	23
Improve match results	94	22
A new stadium	80	18
Reduce the amount of sectarianism at matches	68	16
Make it family friendly/child friendly	62	14
Improve facilities generally	50	11
Reduce admission prices	35	8
Better promotion of international soccer	32	7
Reduce the amount of hooliganism	27	6
Improve pre-match/half-time entertainment	25	6

Base: 440

- 6.13 Improving the standard of play and the improving match results were the two factors stated most often. A new stadium and reducing sectarianism were also important.
- 6.14 Making it more family friendly was more likely to be stated by females (21%).
- 6.15 Whilst those from the Protestant community were more likely to want a better standard of play (25%) and improved match results (25%), they were also slightly more likely to say that they would like a new stadium (19%).
- 6.16 Reducing the amount of sectarianism was more likely to be a factor for ABC1s (21%) and those from a Catholic background (26%).

The image of Northern Ireland soccer

- 6.17 Armchair fans were asked about their opinion of Irish League soccer and their perception of the general public's opinion. A similar question was also asked about international soccer.

	Personal		Perception of General Public Opinion	
	Count	%	Count	%
Very good	10	2	11	3
Good	70	16	49	11
Neither/nor	85	19	88	20
Poor	138	31	144	33
Very poor	96	22	104	24
Don't know	41	9	44	10

Base: 440

- 6.18 The percentage that perceived Irish League soccer to be very good or good was low (18%). Personal opinion was only slightly more positive than the perception of the opinion of the general public.
- 6.19 The image of Northern Ireland soccer was also rated poorly: only 16% thought, personally, that it was good while 15% thought that general public perception was good.

	Personal		Perception of General Public Opinion	
	Count	%	Count	%
Very good	14	3	20	5
Good	55	13	44	10
Neither/nor	81	18	75	17
Poor	140	32	126	29
Very poor	116	26	136	31
Don't know	34	8	39	9

Base: 440

Opportunities in soccer

6.20 Respondents were asked whether they thought that there were sufficient opportunities for a number of groups to participate (in whatever way) in soccer in Northern Ireland.

6.21 The table below presents the responses of those who stated “yes”.

Table 6.6: Yes, there are sufficient opportunities in soccer for...		
	Count	%
Families/children	200	45
Young people	252	57
Women	126	29
People with disabilities	94	21
People from a Catholic community background	268	61
People from a Protestant community background	302	69
People from ethnic minority backgrounds	178	40
Older people	130	30

Base: 440

6.22 Respondents were least likely to think that there were sufficient opportunities for people with disabilities, women and older people.

6.23 Those from a Catholic background were less likely to say that there were sufficient opportunities for Catholics (52%).

General Comments in relation to Soccer in Northern Ireland

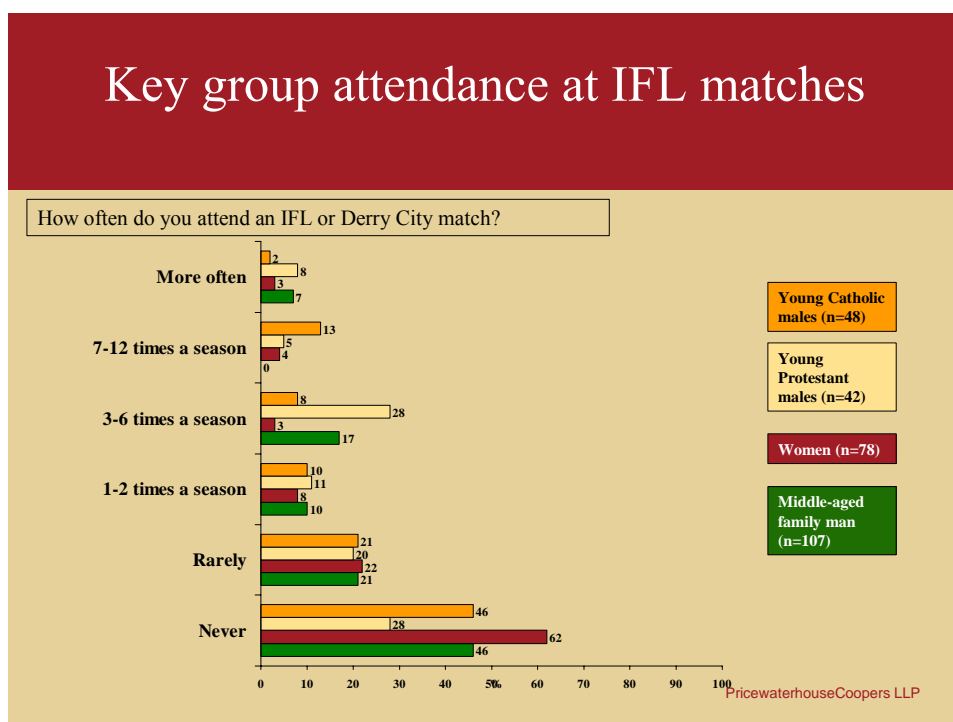
6.24 Respondents were also invited to provide additional comments on soccer in Northern Ireland. The table overleaf lists some of the most common remarks.

Table 6.7: Comments on soccer in general	
	Count
Training for young people in schools and clubs should be improved	68
Soccer in Northern Ireland needs better results	43
Soccer needs better funding	42
Bigotry, sectarianism, chanting etc should be reduced	40
Facilities should be improved, it should be more user-friendly	33
More family involvement should be encouraged	20
It's a sport driven by money	19
Northern Ireland needs better players	18
The day and time of matches should be changed	17
Cross-community matches should be promoted	14
Crowd stewarding should be improved	13
Grounds should be improved, more are needed	11
Prices should be reduced, especially for children	10
Better playing fields are required	10

- 6.25 It can be seen from the above that training for young people is a key concern for respondents. One respondent suggested that clubs and local schools could have stronger links.
- 6.26 As might have been expected, given findings reported previously in this report, better results for the Northern Ireland team is also very important. One in ten armchair fans gave this response.
- 6.27 Other important issues include levels of funding for soccer, sectarianism, and the need to improve facilities (particularly to make them more family friendly).

VII Key target groups

- 7.1 In this section, we detail the findings from a further analysis of the data which identified a number of distinct groups within the armchair base: middle-aged family men; young male Protestants; young male Catholics; women; and people living in areas without an IFL Premiership team. We examine the factors that affect their attendance and identify the triggers which might encourage them to attend IFL and international soccer matches more often.
- 7.2 The chart below illustrates attendance patterns at IFL matches for some of these groups.



Middle-aged family man

- 7.3 The middle-aged family man is aged between 30 and 59 and has children under the age of 16. He spends on average up to five hours a week following soccer (63%).
- 7.4 The main reasons he doesn't attend IFL matches more often are:
- A lack of interest (31%);
 - The standard of play (31%);
 - Work commitments (20%);
 - The facilities (20%); and

- Bigotry and sectarianism (20%).

7.5 Factors that he views as very important in IFL soccer are²:

1. More family-friendly facilities (64/45%);
2. The standard of play (64/59%);
3. Better promotion of IFL soccer (56/47%);
4. Reducing sectarianism, hooliganism, racism and offensive language (48/43%, 49/44%, 46/38% and 55/46%);
5. Toilets (54/41%);
6. Facilities in general (54/40%);
7. Seating (44/35%); and
8. Admission prices (38/29%).

7.6 In relation to international soccer, 40% of middle-aged family men have not been to see a Northern Ireland match in the last two years. The main reasons why they don't attend more often are:

- The standard of play (31%);
- The bigotry and the sectarianism (27%);
- It's not child /family friendly (20%);
- They're not interested in international football (19%); and
- Recent match results (16%).

7.7 This group would go to matches more often if:

- The standard of play improved (26%);
- The amount of sectarianism at matches was reduced (21%); and
- It was more family friendly (20%).

² Percentages in brackets refer to the group result compared to the overall survey results. In some cases, these percentages may be lower than the overall survey results. This reflects the higher importance placed on this factor by the group in question in relation to the other factors rated by them.

- 7.8 This analysis shows therefore that the middle-aged family man is interested in soccer and has strong views on the subject compared to other groups in our survey.
- 7.9 The key triggers which will affect his attendance patterns are facilities and behavioural issues.

Young male fans from a Catholic background

- 7.10 We also examined the views of young male fans (aged under 30) from a Catholic community background. The following paragraphs outline the key factors which affect the attendance of this group at IFL matches. However, care should be taken in any consideration of these findings given the low number (n=41) of fans in this group.
- 7.11 On average, the young male Catholic armchair fan spends up to five hours a week following football (73%).
- 7.12 The main reasons he doesn't attend IFL matches more often are:
- A lack of interest in IFL soccer (44%);
 - The standard of play (37%); and
 - Bigotry and sectarianism (17%).
- 7.13 What he views as very important in IFL soccer are:
1. Better promotion of IFL soccer (66/47%).
 2. Reducing sectarianism (63/43%);
 3. Reducing offensive language (56/46%);
 4. Reducing hooliganism (56/44%);
 5. Reducing racism (50/38%);
 6. Improving the facilities generally (47/40%);
 7. Improving the catering facilities (41/27%);
 8. Reducing the admission prices (38/29%);
 9. Improved refereeing (38/21%); and
 10. Changes to the match times (28/18%).

- 7.14 In regard to international soccer, 76% of young male Catholics support the Republic of Ireland as their main international team and 7% support NI. Only 7% of this group don't support a team at all.
- 7.15 A large majority (78%) has not been to see a Northern Ireland match in the last two years. The main reason this group does not attend more often reflects a lack of support for the Northern Irish team; 49% gave this as a response. Other reasons for non attendance include:
- A lack of interest in international football (20%);
 - The standard of play (15%); and
 - The bigotry/sectarianism (15%).
- 7.16 Key factors which would encourage the young male Catholic to attend were given as:
- Reduced sectarianism (20%);
 - Improved standard of play (17%); and
 - A new stadium (17%).
- 7.17 The young male Catholic can therefore be seen to have an interest in soccer and strong views on the subject; however, he is not very interested in IFL or NI international matches.
- 7.18 Key triggers which may encourage him to attend more frequently are behaviour, standard of play, and facilities.

Young male fans from a Protestant background

- 7.19 We also looked at young (again, under 30 years of age) males from a Protestant background. Again, these findings should be interpreted with care given the low number of respondents in this group (n=56).
- 7.20 The majority of this group (65%) spend up to five hours a week following football and a further 17% devote 10 or more hours to football.
- 7.21 The three main reasons why the young male Protestant doesn't attend IFL matches more often are:
- The standard of play (41%);
 - A lack of interest in IFL soccer (25%); and
 - Work commitments (23%).

- 7.22 What he views as very important are:
1. Improved standard of play (62/59%);
 2. Improvements to the toilet facilities (56/41%);
 3. Better promotion of IFL soccer (44/47%);
 4. Improvements to facilities in general (42/40%); and
 5. Changes to the match times (22/18%).
- 7.23 At the international level, 55% of young male Protestants support Northern Ireland as their main international team; 18% support England and 18% don't support an international team at all. Almost half (46%) have not been to an NI match in the last two years.
- 7.24 The young male Protestant doesn't go more often because:
- He doesn't like the standard of play (40%);
 - He doesn't like recent match results (31%);
 - The facilities (16%); and
 - The timing of matches (16%).
- 7.25 Factors which would encourage him to attend more often are:
- Improved standard of play (29%);
 - Improved match results (29%); and
 - A new stadium (22%).
- 7.26 From our analysis it is clear that the young Protestant male is interested in soccer but has less strong views on IFL soccer. There is evidence, most notably that 18% support England as their main international team, that he is gravitating towards English Premiership and English international teams.
- 7.27 Key triggers for the young Protestant male are the standard of play and facilities.

Women

- 7.28 There were 73 women who were identified as armchair fans in our survey. Of these, 53% spend 2-5 hours a week and 29% spend less than one hour per week following soccer.

- 7.29 The female armchair fan doesn't attend IFL matches more often because:
- She's not interested in IFL football (63%);
 - She doesn't like the standard of play (14%); and
 - None of her friends or family go to matches (10%).
- 7.30 What she views as very important are:
- Making it more family/child friendly (48/45%); and
 - Reducing the amount of sectarianism and hooliganism at matches (43/43% and 46/44%).
- 7.31 Women are more likely (26/20%) not to support an international team. Of those surveyed, 35% supported NI and 19% RoI as their main team. A very high proportion (88%) of females has not been to see Northern Ireland in the last two years (compared to 63% of males).
- 7.32 The main reasons she doesn't go more often are:
- She's not interested in international soccer (38%);
 - She doesn't support the NI team (14%);
 - She doesn't like the standard of play (14%) and the bigotry and sectarianism (14%);
 - It's not family/child friendly (12%); and
 - None of her friends or family go to matches (12%).
- 7.33 Our results show that women are interested in soccer in general but not the IFL.
- 7.34 Key triggers for females are interest in soccer, behaviour, standard of play and facilities.

Proximity to an IFL Premiership team

- 7.35 People living in District Council areas without an IFL premiership team (n=127) spend longer following football than those who live in an area with one or more teams (41% of the former spend six or more hours a week compared to 33% of the latter).
- 7.36 Factors discouraging fans living in non-IFL areas are:

- A lack of interest in IFL soccer (35%);
- The standard of play (29%);
- The bigotry/sectarianism; and
- The facilities (11%).

7.37 While factors discouraging fans living in IFL areas are:

- A lack of interest in IFL soccer (39%);
- The standard of play (33%);
- Work commitments (15%); and
- Facilities (12%).

7.38 IFL area fans thought that the following were very important:

1. Improving the standard of play (65/59%);
2. Making it more family friendly (49/45%);
3. Improving facilities (41/40%);
4. Reducing sectarianism, hooliganism, racism, and offensive language (37/43, 39/44, 35/38 and 35/46%).

7.39 People surveyed in IFL areas are slightly more likely to support NI but are less likely to attend matches (72/56% have not been in last two years).

- People in IFL areas don't go more often because:
- They're not interested in international soccer (26%);
- Standard of play (25%); and
- They don't support the NI team (16%).

7.40 People in both areas would go more often if:

- Match results improved;
- The standard of play improved;
- Sectarianism was reduced; and

- There was a new stadium.

Summary of key triggers

7.41 In this section of the report, we identified a number of key groups within the 440 armchair fans surveyed:

- Middle-aged family man;
- Young male Catholics;
- Young male Protestants;
- Women; and
- People living in IFL Premiership team areas and non-Premiership team areas.

7.42 Several trigger points were identified for each of these groups. These points are illustrated in the table below.

7.43 The key factors (Facilities, Time, Standard of Play, Behaviour, and Interest) influence each of these groups to differing degrees. These factors will hold the key to persuading these groups to attend IFL soccer matches in the future.

Table 7.1: Key Attendance Triggers					
	Facilities	Behaviour	Standard of Play	Time	Interest
Middle-aged family man	√	√	√√	√	√
Women	√	√	√		√√
Young Catholic males		√√			√
Young Protestant males	√		√√	√	
People with no IFL Premiership team in local area	√		√		√

VIII Conclusions

- 8.1 The objectives of this research were to: determine the general public's level of interest in soccer and identify armchair fans; explore the reasons why armchair fans do not attend IFL and Northern Ireland matches and what would encourage their attendance; and reveal the extent to which they attend matches in England and Scotland. The key findings in relation to each of these objectives are outlined in the following paragraphs.

Level of interest

- 8.2 This research has identified three levels of interest in soccer: the 'not interested' (62%), 'armchair fans' (35%) and IFL/Derry City 'regulars' (3%)³. The 'not interested' are more likely to be female and more likely to be from a Catholic background, while 'regulars' and 'armchair fans' are more likely to be male and from a Protestant background. Armchair fans are also more likely to be single and less likely to have children.
- 8.3 Almost half (43%) of those surveyed followed more than one football team. Most armchair fans support a team in the English Premiership, however there is also strong support for Scottish teams. Just over a fifth of those surveyed support an Irish Football League team or Derry City.

Attendance at matches

- 8.4 This research revealed that 8% of the 383 fans who support an English team and 11% of the 164 fans that support a Scottish team attended a match at least once a month.
- 8.5 Over half of armchair fans never or rarely attend any matches at all. Most armchair fans (68%) never or rarely attend IFL/Derry City matches while 67% have not attended a Northern Ireland international match within the last two years. A fifth of those surveyed did not support an international team.

Reasons for non-attendance

- 8.6 In relation to IFL matches, the main reasons provided for non-attendance was a lack of interest in IFL football and the standard of play. Also important were competition from televised soccer, work and family commitments, and the standard of facilities.
- 8.7 Almost a fifth of those surveyed stated that they would never attend an IFL match regardless of any change in circumstances. The reasons for this were given as a lack of interest, the standard of play and health reasons.

³ Weighted values.

- 8.8 The main reasons for non-attendance at international matches were similar. The standard of play and a lack of interest in international football were cited most often. However, bigotry and sectarianism was much more of a factor than in IFL matches.
- 8.9 Those from Protestant and those from Catholic backgrounds were likely to be discouraged from attending for different reasons. Protestants were more concerned with the standard of play and recent results, whereas Catholics were more likely to not be interested in, or support the international team and to dislike the bigotry and sectarianism.

Factors which would encourage attendance

- 8.10 Improving the standard of play is the main factor which would encourage attendance at both IFL/Derry City and NI international matches.
- 8.11 The armchair fans also thought that IFL soccer should be promoted better, that IFL facilities should be more family friendly, and the level of hooliganism and sectarianism should be reduced.
- 8.12 In relation to international soccer, other factors included better match results, a new stadium, and a reduction in the level of sectarianism.
- 8.13 Differences in the factors rated as important emerged across gender, community background and socio-economic group.

Key target groups

- 8.14 A number of key groups emerged from the research: middle-aged family men; young male Protestants; young male Catholics; women; and people living in areas without an IFL team. Several trigger points were identified for each of these groups, including: Facilities; Behaviour; Standard of Play; Time; and Interest.

Monitoring arrangements

- 8.15 This survey has described the characteristics of armchair fans in Northern Ireland, highlighting the dimensions on which they vary from the 'not interested' and the 'regulars'. It has identified a number of key target groups within these categories and the key issues and concerns which are most important to them.
- 8.16 One of the objectives of this research was to examine potential monitoring arrangements to measure the impact of developments in soccer on armchair fans. It is recommended that the Department of Culture, Arts and Leisure, once the additional funding has been made available to soccer in Northern Ireland and that sufficient time has elapsed for the funding to have had an effect, should undertake further research on armchair fans. It is likely that this survey could usefully be repeated in three to four years' time.

- 8.17 An identical methodology, including sample frame and survey instrument, should be adopted so that comparisons may be drawn, over time, between issues such as:
- The impact of the funding and reforms on the characteristics of armchair fans;
 - Levels of attendance at both IFL and international matches;
 - Factors which discourage/encourage attendance; and
 - View on soccer in Northern Ireland in general.

Further research

- 8.18 In addition to this survey to monitor the impact of the additional funding for soccer in Northern Ireland, we would recommend that further research is undertaken into a number of issues which have emerged during this study. These include:

Ethnographic study

- 8.19 Important insights into the impact of the additional funding could be gained through observational techniques. For example, armchair fans who have never or rarely attended IFL or international matches could be accompanied to a match and their immediate reactions, perceptions and experiences recorded. This would enable the relevant authorities to examine the gaps, if any, between the perception and the reality of the match experience and in particular, issues such as sectarianism, hooliganism, and the standard of play.

The views of ethnic minorities

- 8.20 Nine respondents from ethnic minority backgrounds participated in this survey, only one of whom was an 'armchair fan'. Given the recent efforts by IFA in targeting racism in Northern Ireland through the *Football for All* initiative, it would be useful to explore the impact of this campaign on perceptions and experiences of people from ethnic minorities. Focus groups would provide an excellent forum to investigate the views of this group in further depth. This approach could be extended to encompass the entirety of the IFA's community relations programme.

The image of Northern Ireland soccer

- 8.21 Our research has identified that armchair fans have a poor perception of both domestic and international soccer. A further study could probe these attitudes in greater depth and consider ways in which soccer in Northern Ireland could be marketed, using the key groups identified above as a basis for the work. This research could dissect the attendance triggers which emerged during our survey and analyse the ways in which the needs of the key groups could be met.

- 8.22 The results presented in this report are the main findings of the research. The full, detailed results represent a valuable source of data about the views and behaviour of those interested in soccer. These results also should be considered alongside the parallel research into attendance at NI soccer matches undertaken by RES.
- 8.23 Our survey results should be of interest to all those concerned with the future of soccer in Northern Ireland including the Sports Council, the IFA, the IFL, and soccer clubs. In this context, we would make the following recommendations:
- The outcomes of this research should be made available to all those interested in soccer;
 - The results should be used to establish targets for the soccer strategy against which progress towards the implementation of the strategy can be measured;
 - The IFA and IFL should consider the implications of these results for their marketing strategies in relation to Northern Ireland international football and Irish League soccer and should be invited to prepare an appropriate plan in this regard;
 - The survey should be repeated in three or four years' time to establish the changes, if any, which have occurred; and
 - Further research should be considered into the opinions and experiences of specific groups as noted above, including, for example, the views of ethnic minorities on soccer in Northern Ireland.