

# UEFA National Association Research

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Slovakia Report February 2016

A black and white photograph of a soccer player in motion, about to kick a ball. The player is in the foreground, wearing a dark jersey and shorts, with their right leg extended towards the ball. The ball is a standard soccer ball with a pattern of dark and light panels. The background is a blurred soccer field with other players and a goal visible in the distance. The overall tone is dramatic and focused on the action.

# Contents and executive summary

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# Executive summary



## Key findings

1. The SFZ is viewed in a negative light overall and faces a difficult challenge with perceptions of corruption, commercialism and being dominated by money.
2. Adult participation in sport is on par with Eastern European countries, and football is the top team sport being played. The drop-out rate among children is a concern, particularly as they are moving to other sports.
3. There is a desire from parents' for their children to play football, but opportunities are seen as insufficient. On- and off-pitch facilities, particularly in rural areas, are seen as an area of concern.
4. Although Slovakian football fans are engaging with football online, they aren't necessarily using the SFZ's communication channels. And amongst those that are engaging with their content, opinions are mixed.
5. Interest levels in the Fortuna Liga are on par with the Premier League, but there is still a strong perception that the league is boring and does not inspire pride.



## Recommendations

1. The SFZ could utilise the construction of the national stadium to address two key concerns: transparency (sharing financial info.) and stadium quality/security.
2. Among children that are dropping out, the key reason is they are migrating to solo sports. The SFZ need to promote the benefits of playing team sports; focusing on teamwork, solidarity and social bonding.
3. Whilst the SFZ is investing money into building a new stadium currently, there should also be a focus on grassroots pitches and facilities – and a clear focus on rural areas would send a very positive message.
4. Euro 2016 is a key moment for the SFZ to capture a new and engaged audience. Football fans are engaging online and via social media, now the SFZ needs to put itself forward as the entry point to all national team news.
5. With an engaged audience inspired by Euro 2016, prominent national team players e.g. Vittek and Mucha could be used as ambassadors of a campaign about the pride of playing for the national team *and* in the league.

# Objectives, Methodology and Sampling

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# Research objectives and methodology



## Objectives

- To get an overview of the attitude towards football in Slovakia (including the national association, the national team, women's football, domestic competitions and grassroots)
- To get a clear picture on how football ranks compared to other sports and entities
- To understand the reasons for the current status of football in Slovakia
- To identify areas to be addressed in future marketing planning in order to improve the image of football in Slovakia

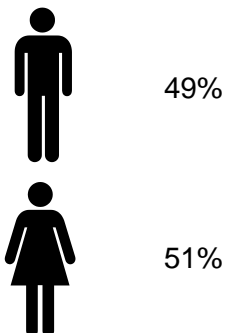


## Methodology

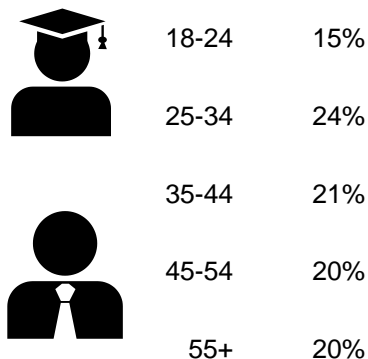
- 21 mins survey
- 1003 interviews
- Interviews conducted in Slovak
- Conducted via online survey
- £0.20 incentives provided to each participant
- Fieldwork period – 28<sup>th</sup> January – 2<sup>nd</sup> February

# Sampling

## Gender



## Age



## Region



Nationally representative sample of the 18+ population in Slovakia based on age, gender and region








# **Sport interest and participation**

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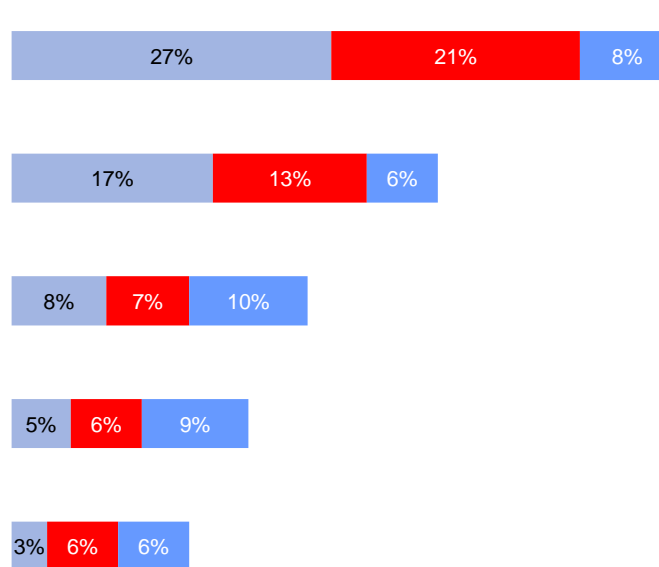
# Sport interest

## Top sports followed

#1	Ice Hockey	65%	
#2	Football	48%	
#3	Cycling	45%	
#4	Tennis	39%	
#5	Skiing	36%	

Average no. of sports followed: **4.7**

## Top sports ranked



## Conversion from sport followed to favourite sport



■ 1st ■ 2nd ■ 3rd







S10: Which of these sports do you follow?

S11: Which of the following sports are your favourite? Please rank your top 3 sports in order of preference.

Base: All Respondents (1,002)

\*Sport following is defined as "anything from supporting a team / player through to watching the sport on TV, reading about in newspapers or online"

# Sports image

			Base	Positive	Negative
#1	Cycling		(443)	94%	2%
#2	Canoe Slalom		(140)	93%	2%
#3	Skiing		(356)	92%	1%
#4	Tennis		(380)	88%	4%
#5	Ice Hockey		(648)	86%	7%
<hr/>					
#9	Football		(454)	83%	7%

*Football has a relatively positive image on the whole.*

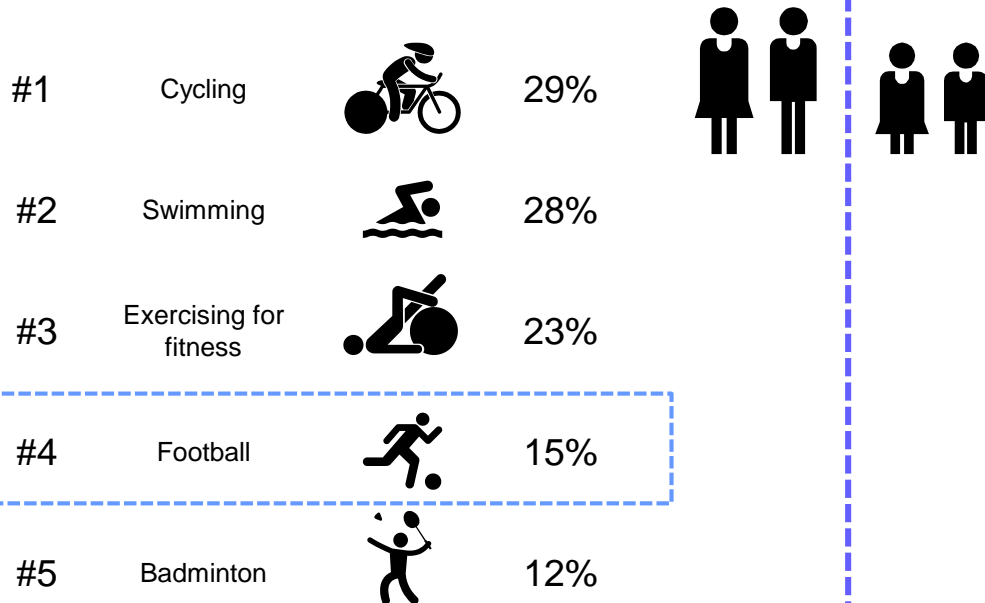
*Although it does not feature in the top 5, it is at a similar level to the nation's #1 sport – ice hockey – and is viewed in a significantly more positive light than other key global (athletics, boxing) and relevant local sports (roller hockey, field hockey).*

*On a continental level, football's image in Slovakia is in line with other European countries. However, the key difference is football ranks higher in Slovakia – and this is because Slovakia has a more negative view on sport in general.*

S20. How do you rate the overall image of each sport? Base: Followers of each sport (Cycling: 443, Canoe Slalom: 140, Skiing: 356, Tennis: 380, Ice Hockey: 648)

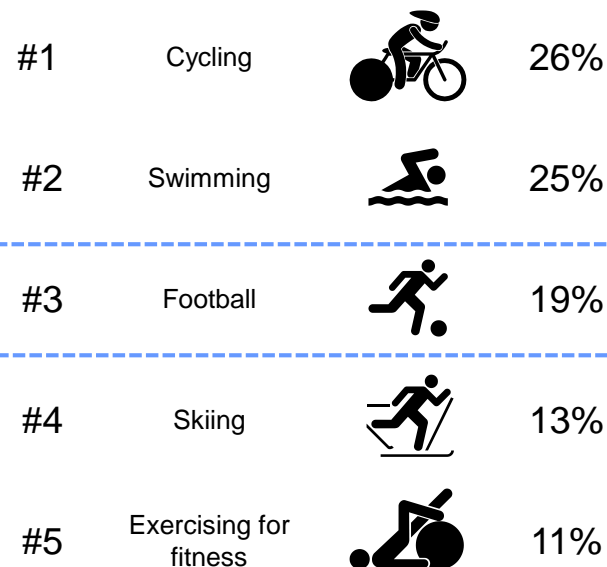
# Sports participation

## Among Adults



Haven't played sport in the last 12 months: 34%

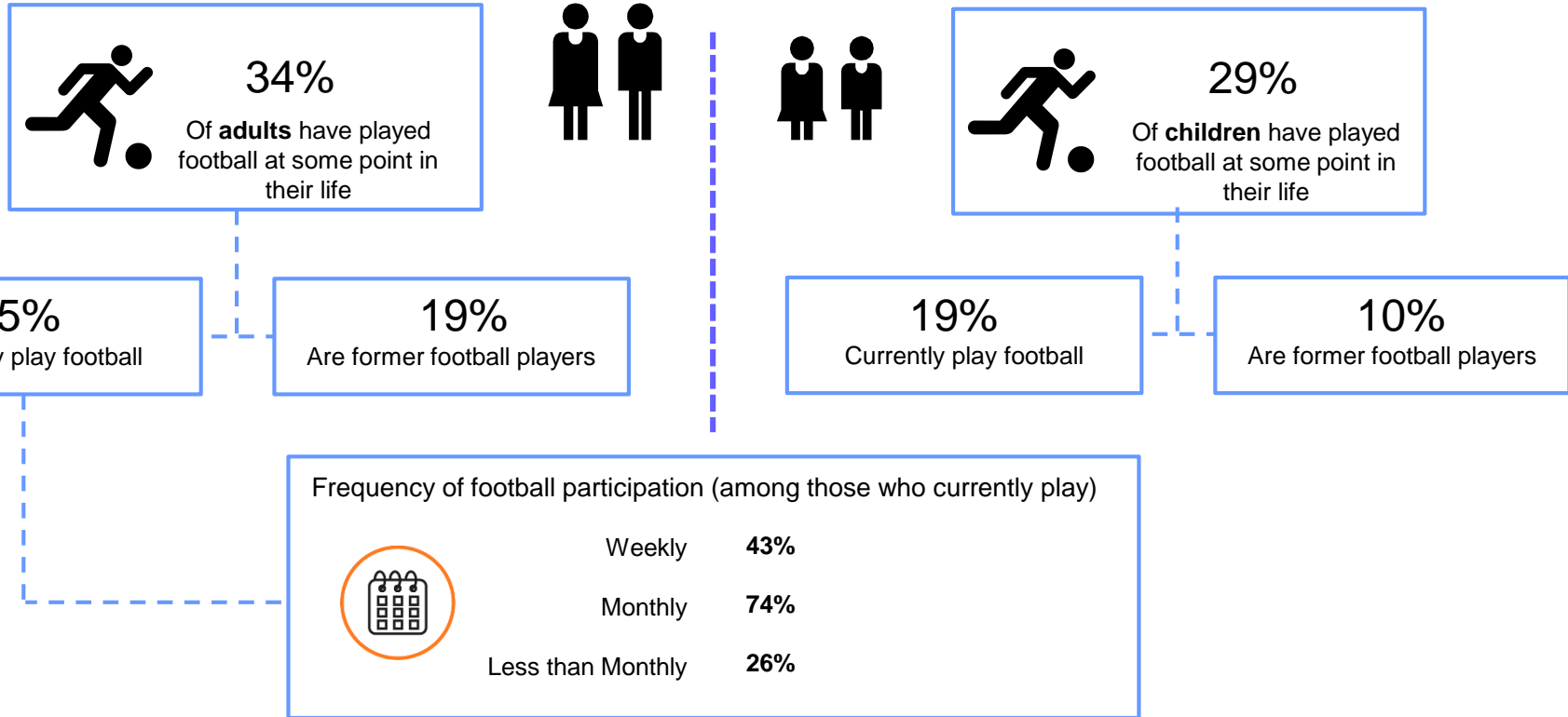
## Among Children



Haven't played sport in the last 12 months: 37%

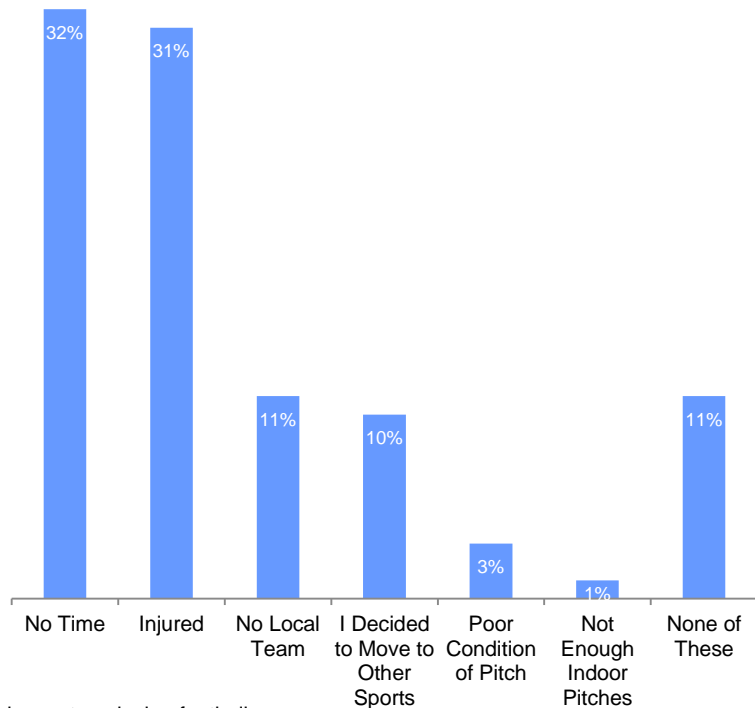
S30: Which of these sports do you play? Base: All respondents (1,002), Parents with children (369)

# Participation in football among adults and children



S30: Which of these sports do you play? (1,002) ; S32 Which of these sports have you played in the past? (1,002) S31: And how frequently do you play football? Base: Football Players (138); S40: Which of these sports do your children play? (369) ; S41 Which of these sports have your children played in the past? (369)

# Reasons adults stop playing football



*Football is the top team sport being played, only beaten by those engaging in solo activities. However, the drop-out rate of adults playing football is relatively high, with a lack of time and injury being attributed most often.*

*It is the 25-44 year olds that are most likely to say they stopped playing because they no longer have the time for it, with just under half of them saying this was the main reason.*

*Among the 45+'s, injury is the key reason. Adults without children are significantly more likely to say they stopped playing because they decided to move to other sports.*

*As there are more former football players than current players in Slovakia, finding a way to strengthen participation levels should be a key target, and these three represent key groups to create tailored marketing activities to meet their needs.*

# Core football fans



79%

21%

30% of the population are core football fans. The profile of a core football fan is heavily skewed towards men. They also tend to be 35+ and earn mid-level income. Their age profile is similar to the overall population but core fans are more likely to be younger compared to the general population.

Although core football fans are more likely to play football than the general population, participation is still relatively low while the dropout rate is still quite high. Core football fans should therefore be a key target for boosting participation.



18-24

15%

34%

25-34

19%

35-44

19%

45-54

23%

55+

24%

66%

Less than €4,200

26%

€4,201 - 8,400

16%

€8,401 – 16,800

38%

€16,801 – 42,000

19%

More than €42,000

1%

Proportion of the population that are...



Football Fans 48%

Core Football Fans 28%



Participation:

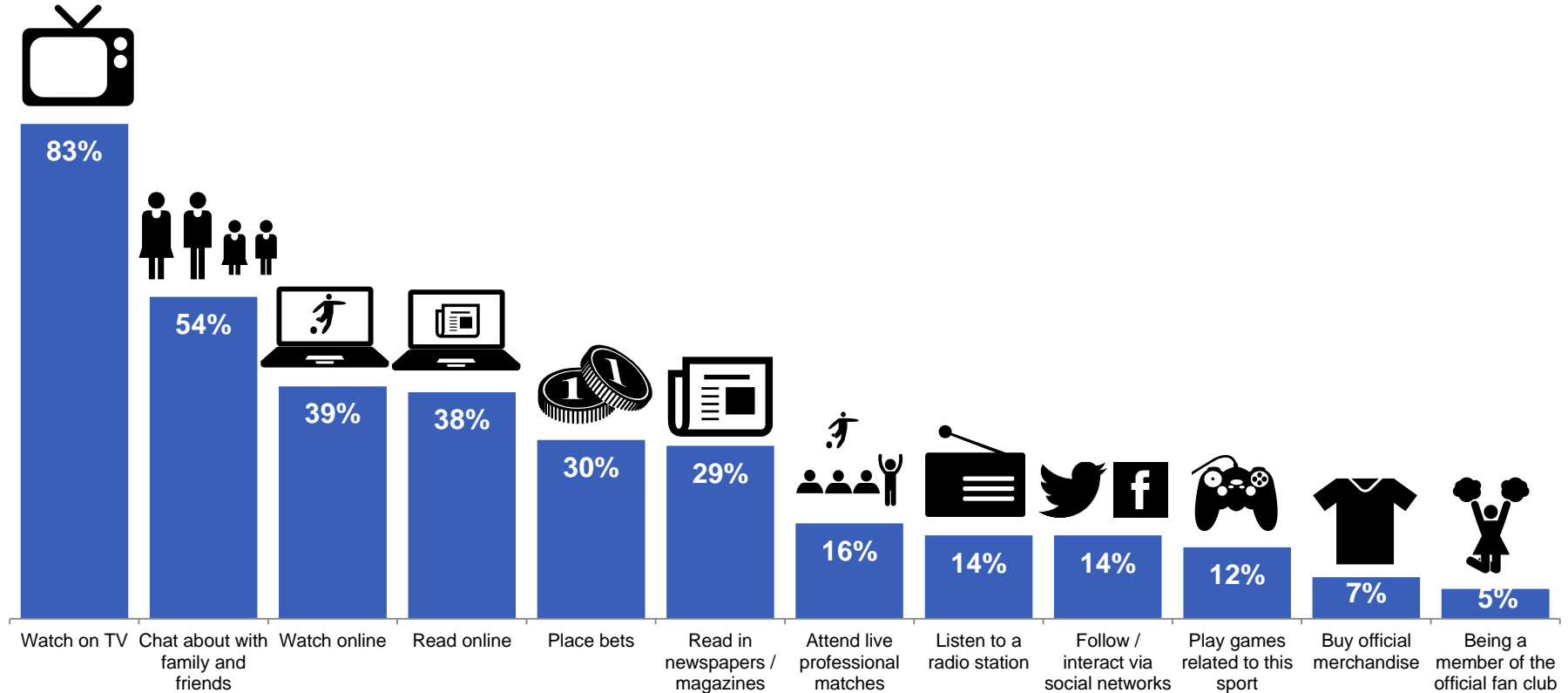
Current Football Player 37%

Former Football Player 34%



S12 How much of a football fan are you?  
Base: Football fans rating in the top 3 (257)

# Football consumption among football fans



S15 How do you follow this sport nowadays?

Base: Those who consider football among their top 3 sports (328)

# Sport Consumption among top sports followed



Watch



Online [net]



Read



Follow

*In comparison to skiing and cycling, football consumption is the most diverse. Although skiing and ice hockey are consumed more on TV, football out-ranks the two sports on other media platforms.*

*This is an excellent vantage point for the SFZ and should be seen positively. To engage more fans, a greater focus should be put on communicating to football fans through the channels outside of TV.*

*Taking advantage of football's leadership of the social media share of voice in the sporting community should be a key part of that.*

#1



88%



53%



29%



14%

#2



87%



51%



25%



12%

#3



83%



50%



24%



8%

S15 How do you follow this sport nowadays?

Base: Ice Hockey fan (555), Cycling fan (253), Football fan (328)

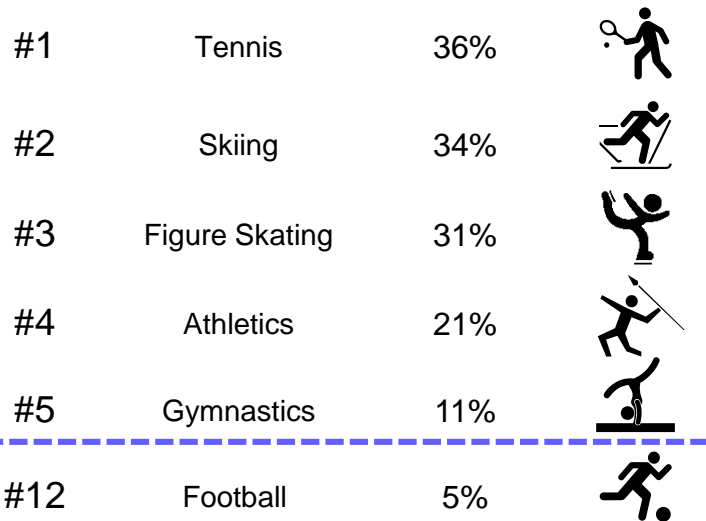




# Interest and participation in women's sport

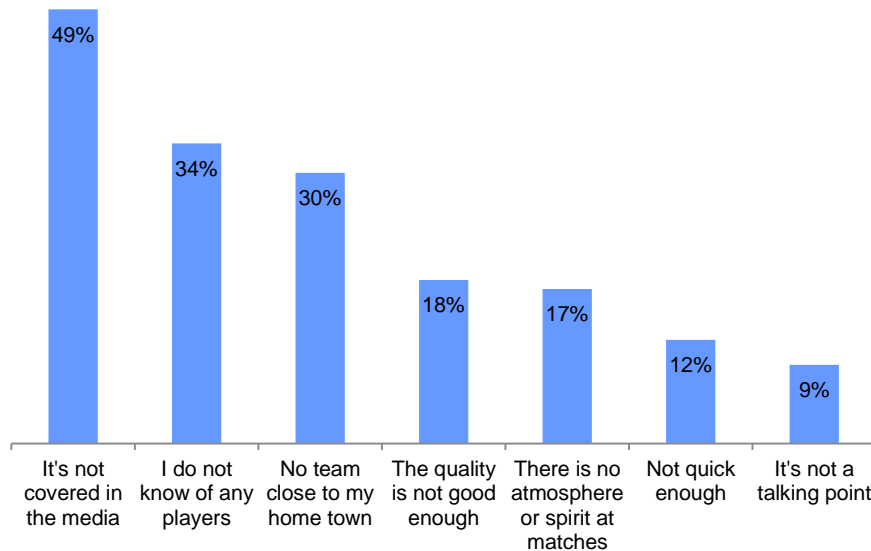
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# Interest in women's sport and barriers to women's football



\*Interest is defined as "interest in women's competitions" and "interest in both men and women's competitions"

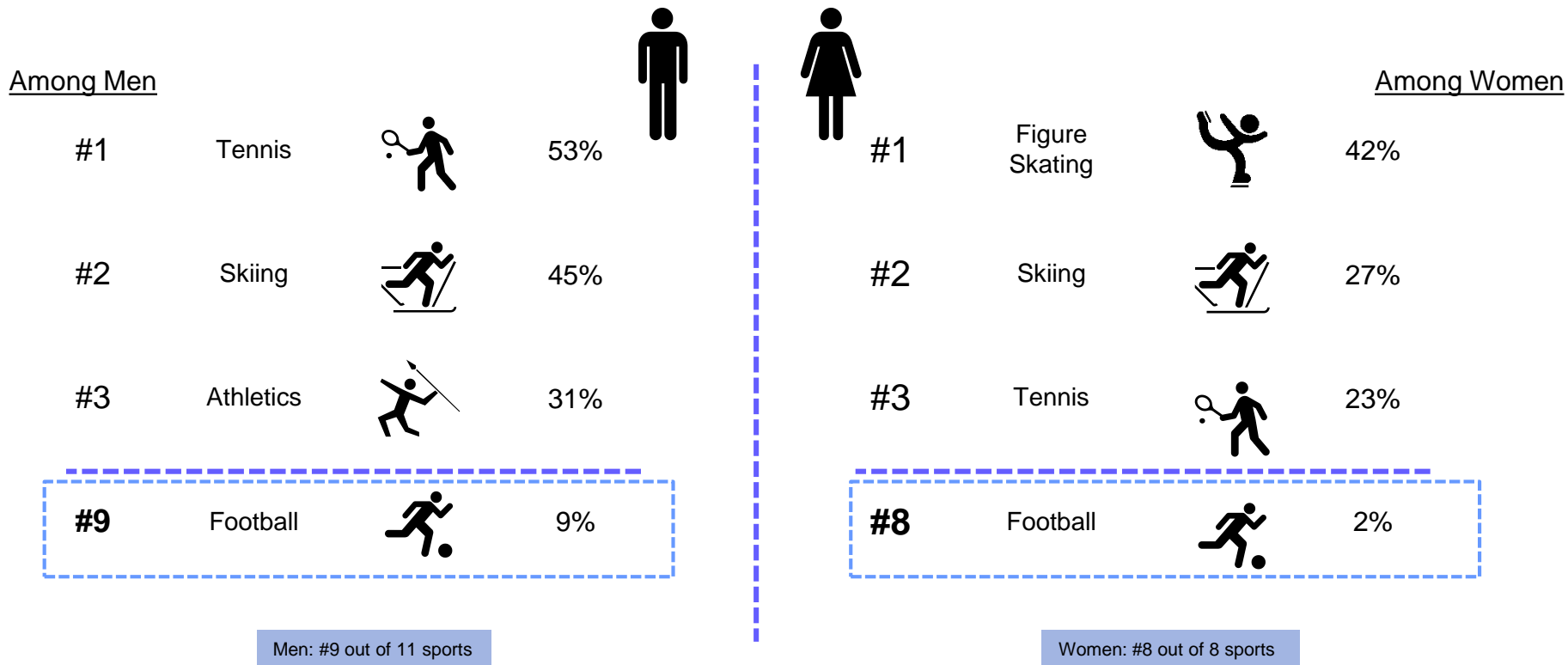
Barriers to following women's football



S16: And of the sports you follow, do you follow the men's or women's competition, or both? Follow can mean anything from supporting a team / player through to watching the sport on TV, or reading about it in newspapers or online. Base: All respondents (1,002)

S17: You said that you did not follow women's football earlier. Which of the following describes why you do not follow women's football? Base: Non followers of women's football (410)

# Interest in women's sport among men and women



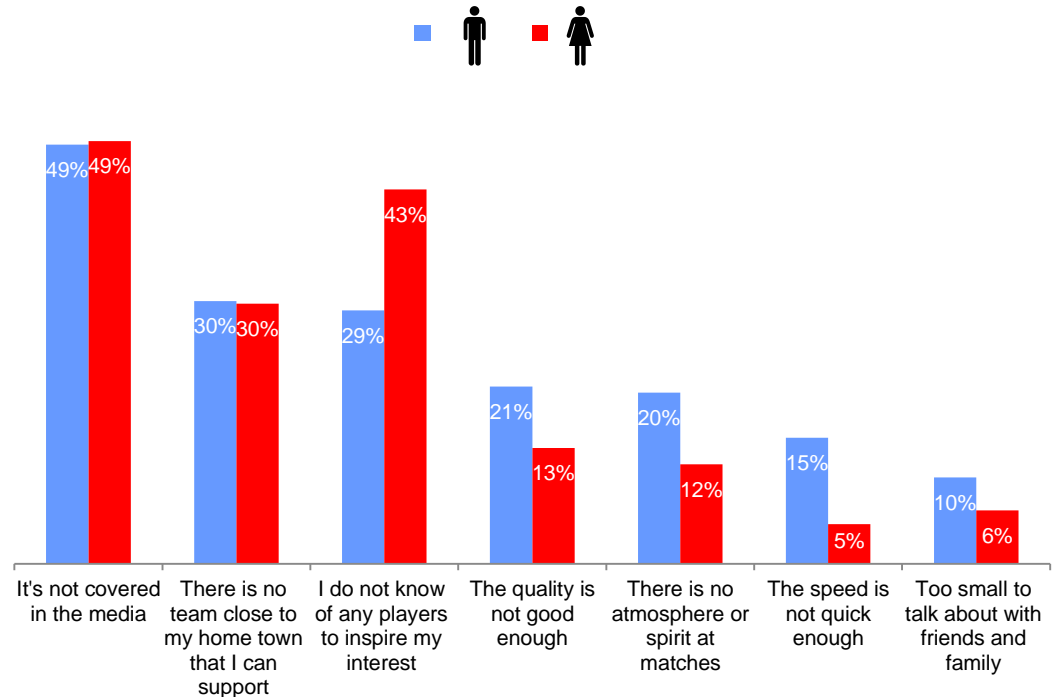
S16: And of the sports you follow, do you follow the men's or women's competition, or both? Follow can mean anything from supporting a team / player through to watching the sport on TV, or reading about it in newspapers or online.  
Base: Base: Males (434) Females (568)

# Barriers to women's football

*The key barrier to women's football amongst both men and women is a practical issue: the level of media coverage. Among men, the secondary reason is also practical: there is no local team to drive interest and engagement.*

*Among women however, the secondary reason is the sport lacking icons to inspire interest. Women are significantly more likely to say this which suggests they are open to women's football and are aware of it's current standing, but it's just lacking that key interest driver. It is not an issue of quality or atmosphere, it just lacks an icon for them to identify with.*

*Men are significantly more likely to say the quality and speed of the games and the atmosphere within games is a factor in their disinterest.*








S17. You said that you did not follow women's football earlier. Which of the following describes why you do not follow women's football?

Base: Those that do not follow women's football; Males (261) Females (149)

# Sports participation among men and women








## Among Men

#1	Cycling		30%
#2	Football		27%
#3	Swimming		23%
#4	Exercising for fitness		16%
#5	Skiing		15%

Haven't played sport in the last 12 months: 34%

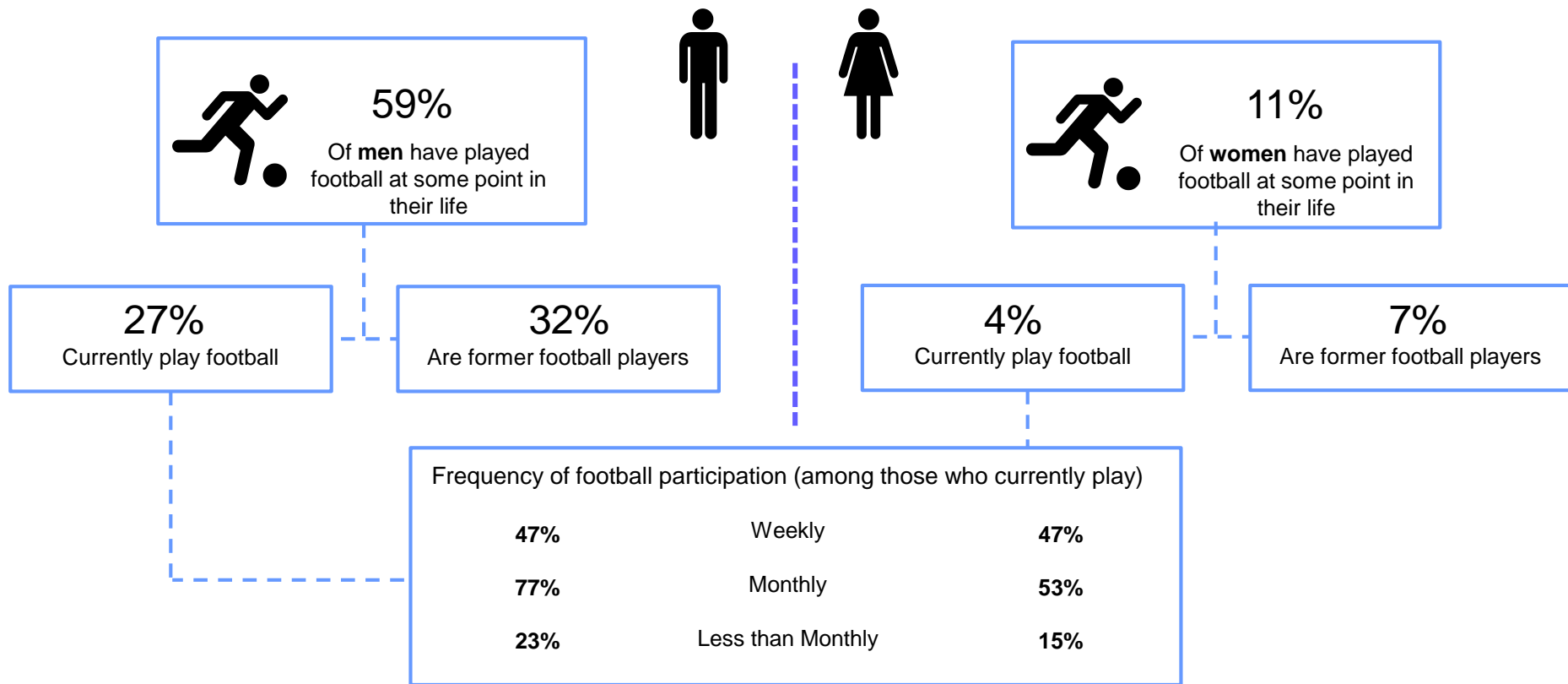
## Among Women

#1	Swimming		33%
#2	Exercising for fitness		29%
#3	Cycling		29%
#4	Badminton		16%
#11	Football		4%

Haven't played sport in the last 12 months: 34%

S30: Which of these sports do you play? Base: Males (434) Females (568)

# Participation in football among men and women



S30: Which of these sports do you play? S32 Which of these sports have you played in the past? Base: Males (434) Females (568)

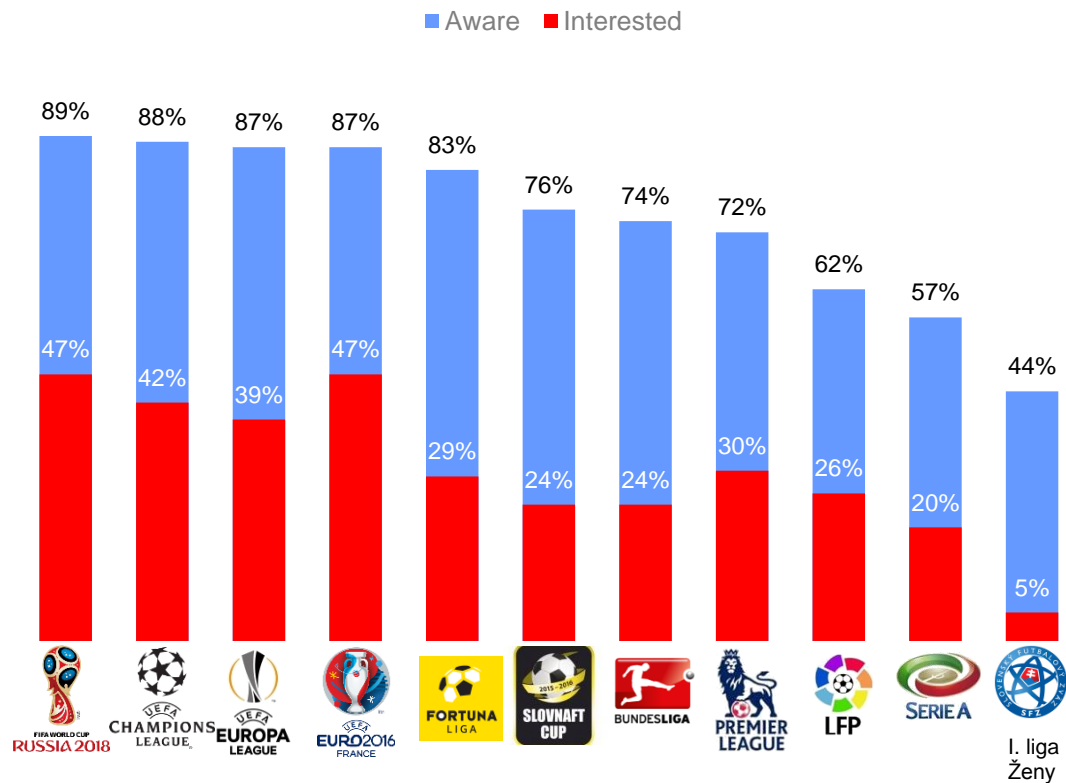
S31: And how frequently do you play football? Base: Males (117) Females (21) **\*CAUTION LOW BASE**

A black and white photograph of a referee running on a field, holding a checkered flag. The referee is wearing dark shorts, dark socks, and dark shoes. The background is blurred, showing a grassy field and a fence in the distance.

# Competition awareness and interest

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# Competition awareness and interest – all respondents



*Awareness of the Fortuna Liga is comparable to the major club and national competitions among the general population, but interest levels are much closer to the Premier League.*

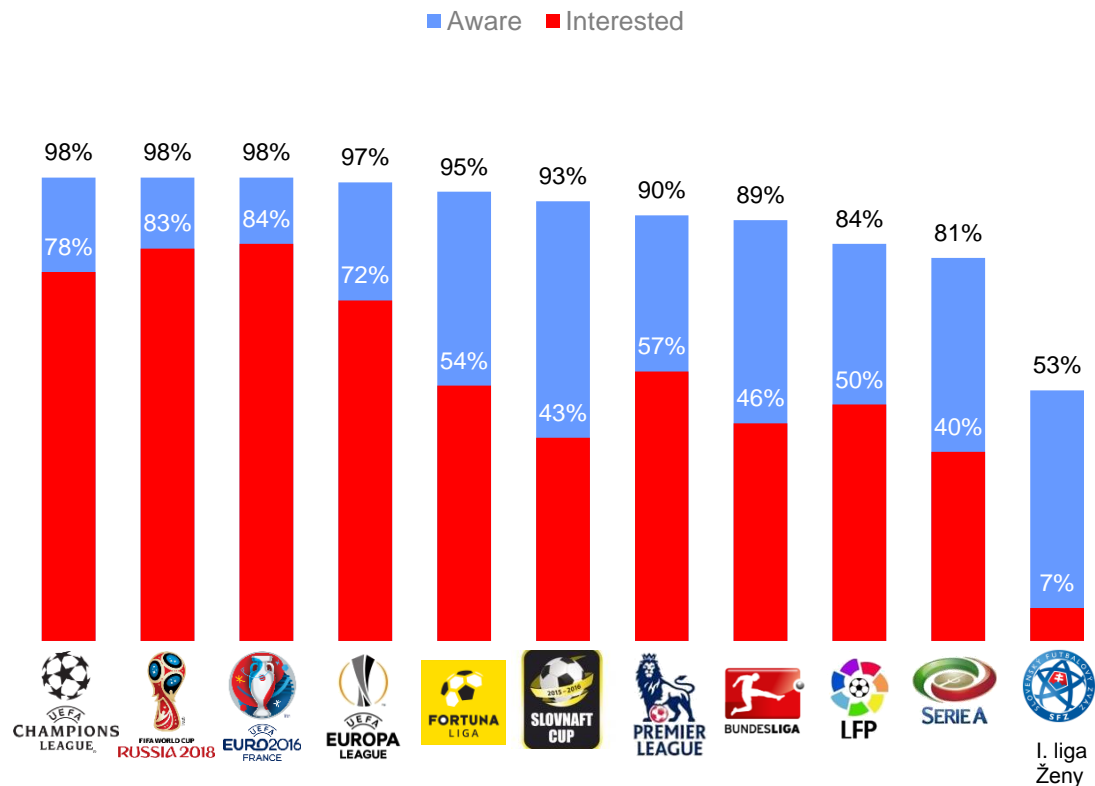
*Awareness of and interest in the Slovnaf Cup is at the same level as the Bundesliga, with just under a quarter of the population interested.*

*Awareness and interest in the I. liga Ženy is very low, with less than half of the population aware that a women's league even exists.*

F20: Are you interested in this football competition or team? Base: All respondents (1,002)



# Competition awareness and interest – football fans



*Among football fans, awareness levels of the two main domestic properties – the league and cup – are strong. However, awareness of the women's league is again below par.*

*Interest in the Fortuna Liga is at a similar level to the Premier League, ahead of the other major European leagues. Despite the fact the Slovak captain plays for a Premier League giant, it should be a small concern that the Premier League attracts a slightly bigger audience.*

*Given almost  $\frac{3}{4}$  of football fans follow the national team, there is no lack of interest in domestic properties. It suggests there is a lack of pride in the domestic league.*

F20: Are you interested in this football competition or team? Base: Football fans (454)

# Competition interest ranking among the adult population



*The international competitions dominate interest levels, with the UEFA club competitions close behind. The Fortuna Liga is held in a similar esteem to the Premier League and La Liga among the general population, with the Slovnaft Cup close behind.*



F20: Are you interested in this football competition or team? Base: All respondents (1,002)

# Tiers of competition interest among football fans



As is often the case, the major international and continental competitions are seen in a league of their own, with the Euro's occupying the top position in part due to Slovakia's recent (and first) qualification for the tournament.

The Fortuna Liga sits in a respectable position alongside the major European leagues and the most prestigious club competition Slovak teams have competed in.

The Slovnaft Cup is also at a respectable level alongside the Bundesliga and Serie A, but the aim should be for it to sit alongside the Fortuna Liga in the second tier.

The I. liga Ženy is understandably in a tier on its own, with women's football in general being of little interest for most.

# Competition and team imagery

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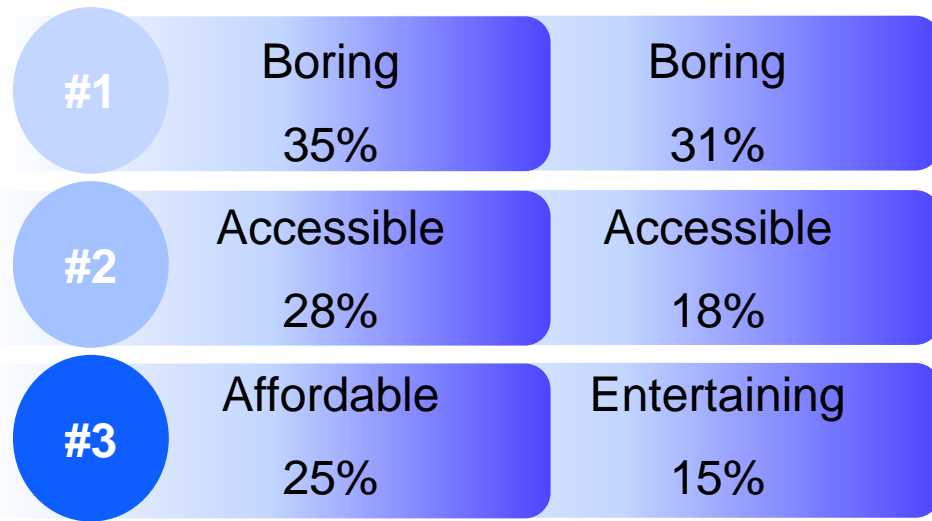


# Imagery of domestic competitions – ‘Fortuna Liga’



Core football fans

Disengaged football fans



*The major challenge for the SFZ is to tackle the established perception that the Fortuna Liga is boring. This does not necessarily require an influx of foreign superstars or a fundamental overhaul of the league, but it does require consulting the fans and understanding the drivers of this perception.*

*One thing that the league is perceived to be lacking, among both core and disengaged fans, is that sense of pride. Perhaps as a result of that, there is also a perceived lack of atmosphere. This is in stark contrast to many of its geographical neighbours – most notably Czech Republic and Poland. Understanding the causes of that could be the key to making the Fortuna Liga more popular than the Premier League.*

F60: Which of these words or phrases describe the following teams of competitions?

Base: Core football fans (248); Disengaged football fans (78)

# Imagery of domestic competitions among adult population



I. liga  
Ženy

#1

Boring

34%

Boring

32%

Boring

28%

#2

Accessible

24%

Accessible

24%

Entertaining

16%

#3

Affordable

14%

Affordable

14%

Accessible

14%

F60: Which of these words or phrases describe the following teams of competitions?

Base: Aware of – I. liga (najvyššia slovenská futbalová liga) (817), Slovenský Pohár (742), I. liga ženy (424)

# Imagery of domestic competitions among football fans



I. liga  
Ženy

#1

Boring

33%

Boring

34%

Boring

31%

#2

Accessible

26%

Accessible

25%

Entertaining

16%

#3

Affordable

21%

Affordable

19%

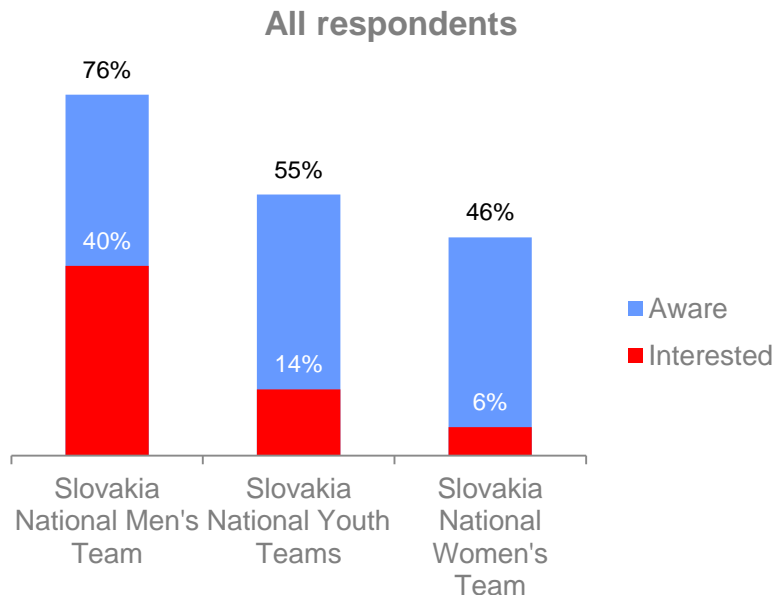
Accessible

15%

F60: Which of these words or phrases describe the following teams of competitions?

Base: Aware of – I. liga (najvyššia slovenská futbalová liga) (427), Slovenský Pohár (416), I. liga ženy (232)

# Team Awareness and interest: all respondents



*Just over ¼ of the population are aware of the men's national team, which is slightly below par. On the bright side, over half of those aware are interested in the national team which is above the continental average.*

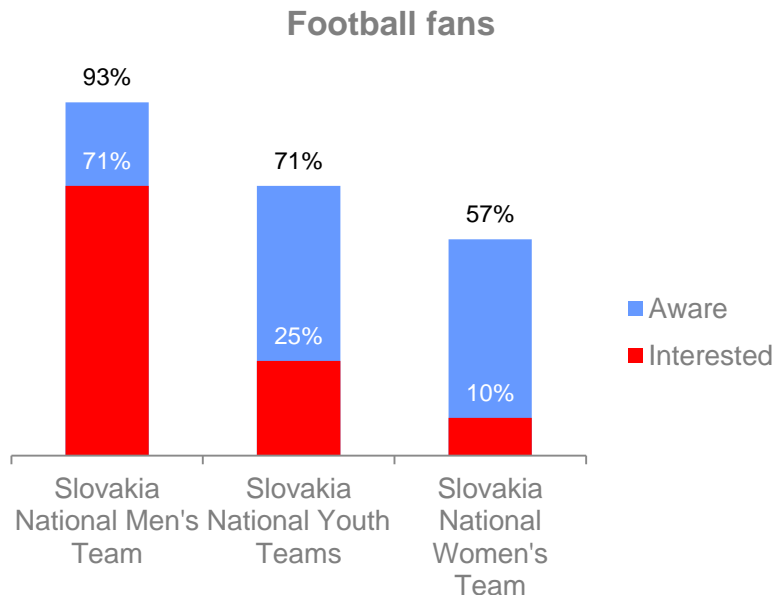
*With the men's national team's qualification to its first ever UEFA European Championship, the SFZ has a great platform to boost awareness in the team and inspire a nation.*

*It is among the youngest age groups where ice hockey has established its dominance in the Slovak sporting world, with over 2/3 of 18-34's following ice hockey compared to less than half following football. The Euro's provides an opportunity to capture the hearts and minds of the next generation.*

*Awareness and interest in the women's team is below par, and again it is among the female population where ice hockey's grip is very strong. A strong women's national team could help football gain some ground.*



# Team Awareness and interest: football fans

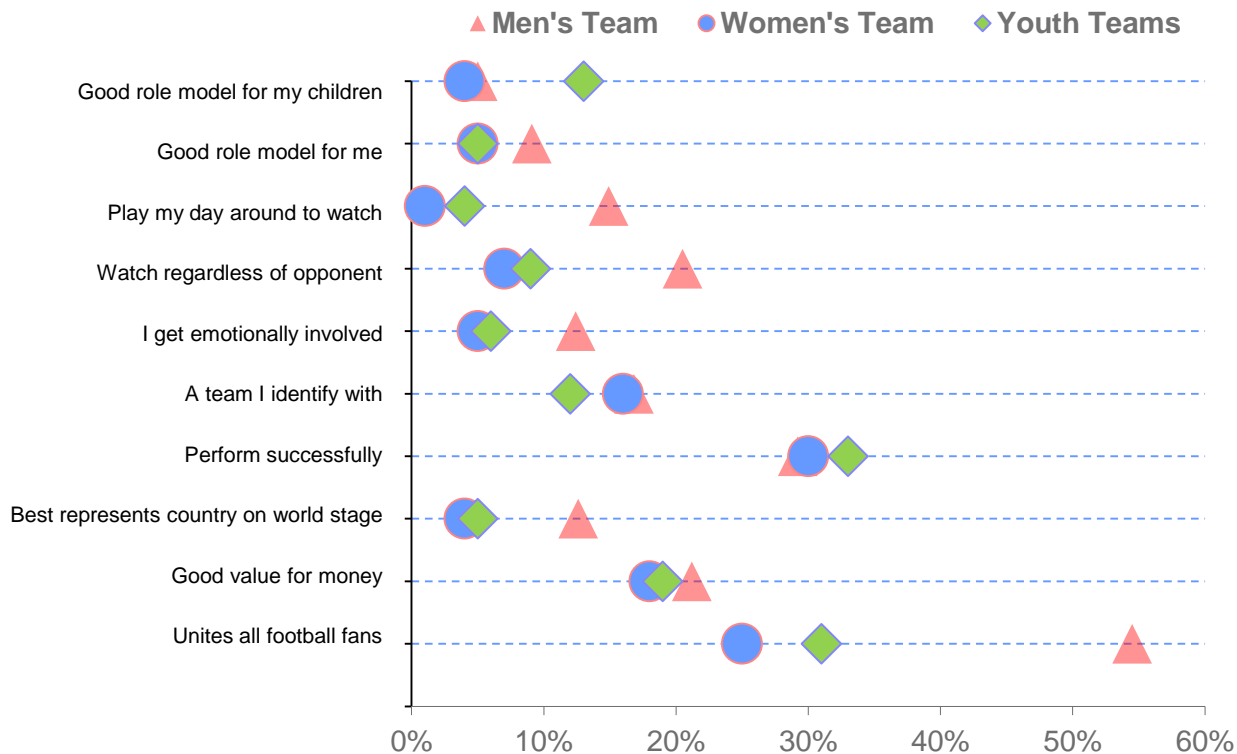


*Among football fans interest in the men's national team is strong. With just under  $\frac{3}{4}$  of football fans following their national team the Euro's will provide an important platform for the SFZ to communicate to the football family through the national team.*

*Interest in the youth team is at a respectable level, particularly given less than  $\frac{3}{4}$  of football fans are aware of the team. Raising awareness should be the main target for the youth teams, and with the Slovak U21 team leading their qualification group for the 2017 Euro U21s this could be an ideal time.*

*Awareness of the women's national team is again below par and should be the main area of focus.*

# Slovakia National teams' brand image



*Above all else, the men's national team is recognised for its ability to unite all football fans and generate an emotional involvement. On the other hand, it is seen as the least successful national team.*

*The youth team is seen as the most successful national team despite the fact it hasn't qualified for an international tournament in over a decade while the men's national team has qualified for its first ever World Cup and Euro's in the last 6 years.*

*The youth team is also seen as the best role model for children, while all three provide similarly good value for money.*

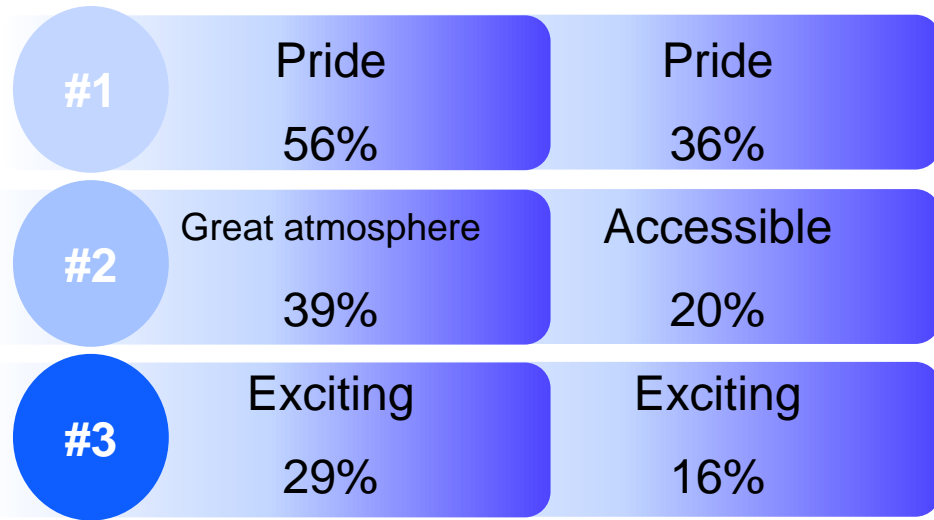
F62: Which of these words or phrases describe the following teams or competitions?  
Base: Competition Aware: Men's team – 746; Women's team – 437, Youth's team – 539

# Imagery of Slovakia national team – Men's team



Core football fan

Disengaged football fans



*Among both core and disengaged football fans, the image of pride cuts through strongly for the men's national team. In fact, there are very few national teams in Europe that inspire pride to the same level.*

*Given the fact pride is found lacking in the domestic club competitions it is also apparent that pride is not simply associated to domestic properties by default. In other words the men's national team has been doing something right in a big way to create this image, and the SFZ should see it as a significant success.*

*The key difference between core and disengaged fans is that core fans recognise the great atmosphere – and the Euro's provides an excellent opportunity to highlight this to the nation overall.*

F60: Which of these words or phrases describe the following teams of competitions?

Base: Core football fans (249); Disengaged football fans (72)

# Imagery of Slovakia national teams among adult population



National Men's Team



National Women's Team



National Youth Teams

#1

Pride

39%

Boring

23%

Family  
Friendly

20%

#2

Great  
atmosphere

24%

Entertaining

18%

Boring

17%

#3

Prestigious

19%

Family  
Friendly

13%

Pride

17%

F60: Which of these words or phrases describe the following teams of competitions?

Base: Aware of – Slovakia National Men's Team (746), Slovakia National Women's Team (437), Slovakia National Youth's Team (539)

# Imagery of Slovakia national teams among football fans



National Men's Team



National Women's Team



National Youth Teams

#1

Pride

49%

Boring

24%

Family  
Friendly

22%

#2

Great  
atmosphere

32%

Family  
Friendly

19%

Progressive

22%

#3

Exciting

25%

Entertaining

19%

Pride

21%

F60: Which of these words or phrases describe the following teams of competitions?

Base: Aware of – National Team (419), National Women's Team (253), National Youth Teams (318)

# Club & national team following

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# Club vs. country



52%

“My **national team** is the most important thing to me as a football fan”

Top 3 Box

“My **club team** is the most important thing to me as a football fan”

Top 3 Box

36%



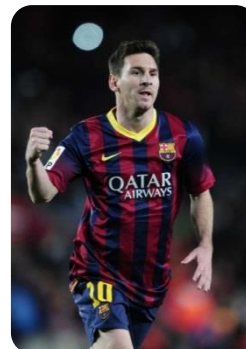
F31: Which is the most important to you as a football fan, your national team or your club team. Please select an answer on a scale of 1-7 where 1 means my national team is the most important thing to me as a football fan and 7 means my club team is the most important thing to me as a football fan.

Base: Football Fans (454)

# Club and national team following



*Although almost  $\frac{3}{4}$  of football fans are interested in the national team, just over half claim to be a supporter. Euro 2016 provides a platform to convert those interested into fully-fledged supporters if the Slovakian national team presents itself in a positive light – on and off the pitch. Domestic club support is low, but perhaps more importantly almost  $\frac{1}{3}$  of football fans claim to not follow any team – club or international. Understanding their motivations for following football could open new revenue streams.*



**34%**  
"I am a fan of international football players"



**32%**  
"I am a fan of domestic football players"

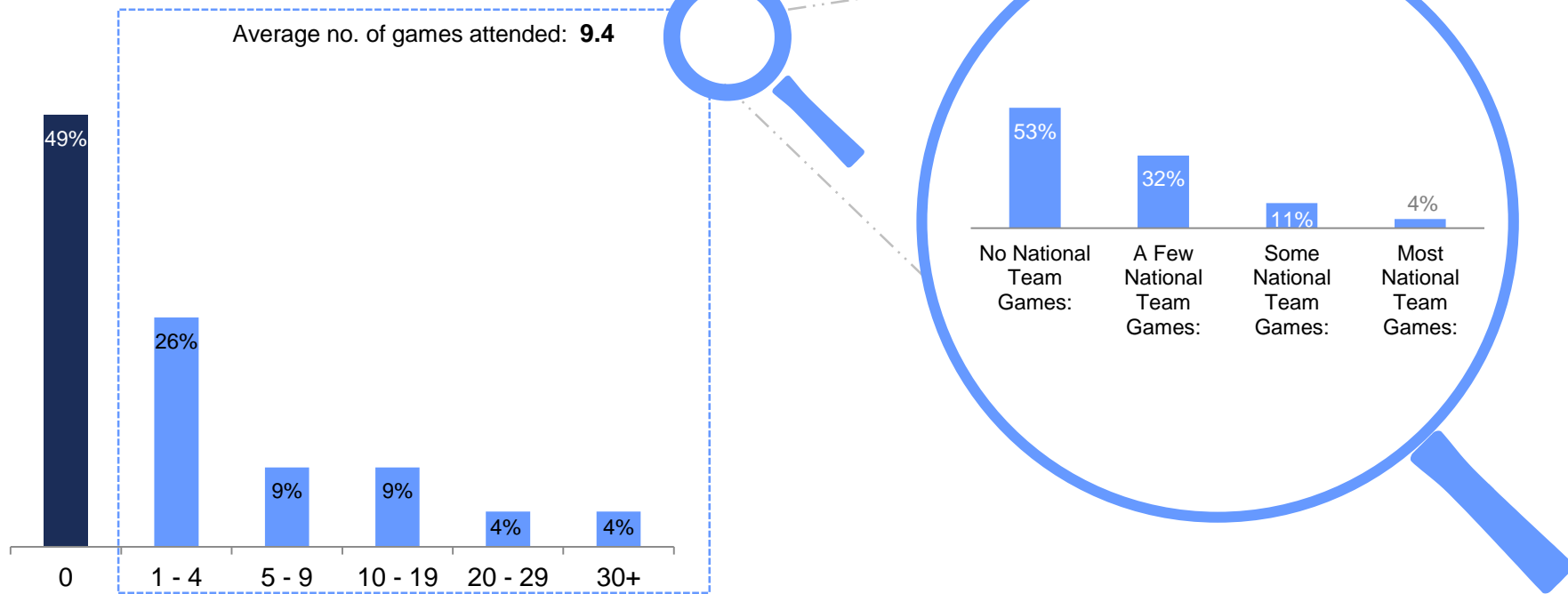
F30: Which of the following describes how you support national and club teams?

Base: Football fans (454)



# Football attendance

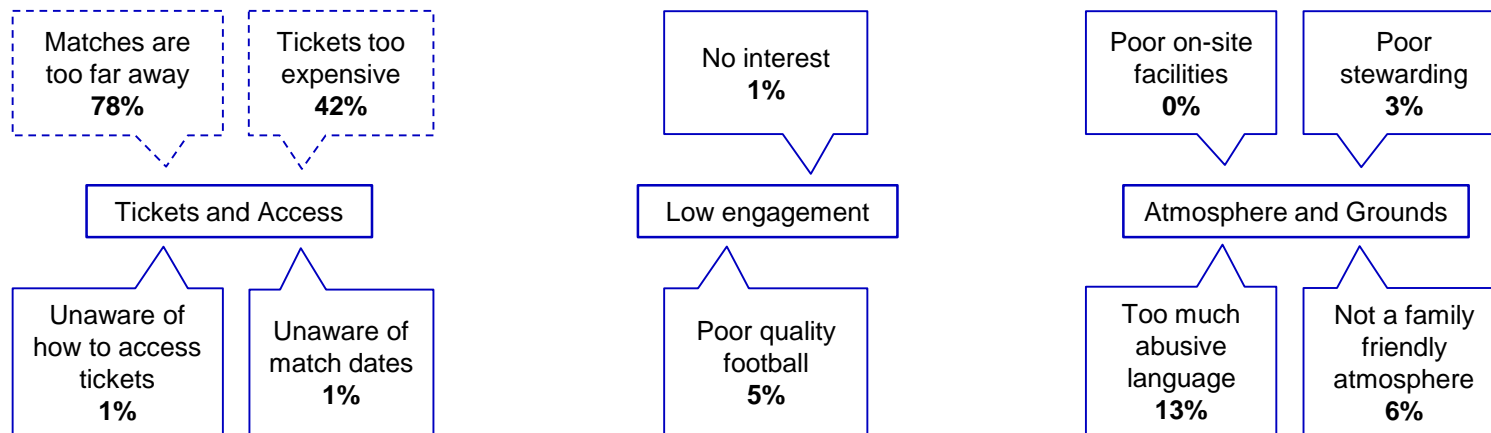
## Professional match attendance among football fans



F41. How many live professional matches do you attend per season? Base: Football Fans (454)

F42. How many live international matches do you attend per season? Base: Match-going Football Fans (230)

# Reasons for not attending National Team matches



*Location/travel/inconvenience along with expense are the two primary reasons for not attending national team games. The secondary reasons for not attending is due to issues with the atmosphere – too much abusive language and a lack of a family friendly atmosphere do play a role, however in the grand scheme of things it is a small minority who have an issue with this.*

F43: You have just stated that you do not attend any live international matches. Why is that?  
Base: Non match-going football fans (123)

A black and white photograph of a soccer player's legs and feet on a grass field. The player is wearing dark shorts with a checkered pattern on the side and a dark sock. Their right foot is planted on the grass, while their left foot is in motion, kicking a soccer ball. The ball is white with dark, swirling patterns. A white line is visible on the grass in the background.

# National association imagery and attitudes to grassroots football

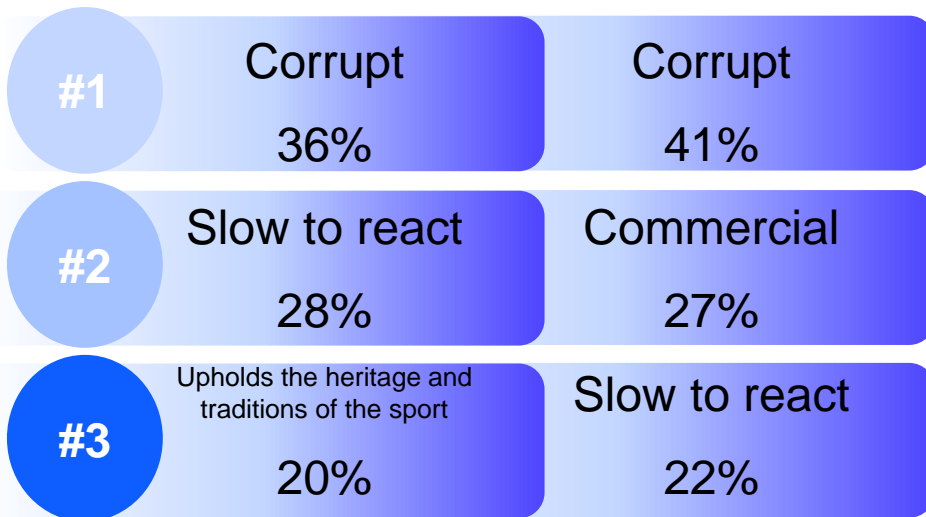
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# SFZ - National Association Imagery



Core football fans

Disengaged football fans



*The SFZ is most associated to corruption across both groups and, alongside perceptions of being cumbersome, this should be a primary concern for the SFZ.*

*On the whole, disengaged football fans are more negative towards the SFZ. While this may seem self-explanatory at a glance, it is often the case that core fans are the most critical of the national association due to increased football consumption leading to increased exposure to negative media.*

*The main bright point is that core football fans do associate the SFZ with upholding the heritage and traditions of the sport.*

NA11: Which of these organisations, if any, does this word describe? Which of these words or phrases describe the following organisations?

Base: Core football fans (257); Disengaged football fans (84)

# National Association Imagery among all respondents



#1

Corrupt

39%

Corrupt

42%

Modern

25%

Commercial

20%

#2

Commercial

22%

Slow to react

22%

Progressive

25%

Modern

20%

#3

Slow to react

20%

Political

21%

Respectful

24%

Respectful

20%

NA11: Which of these organisations, if any, does this word describe? Which of these words or phrases describe the following organisations?

Base: All respondents (1,002)

# National Association Imagery among football fans



#1

Corrupt

37%

Corrupt

53%

Progressive

28%

Modern

22%

#2

Slow to react

26%

Political

29%

Respectful

28%

Respectful

22%

#3

Commercial

22%

Slow to react

28%

Modern

27%

Trustworthy

21%

NA11: Which of these organisations, if any, does this word describe? Which of these words or phrases describe the following organisations?

Base: Football fans (454)

# National Association Imagery among followers of each sport



#1

Corrupt

37%

Corrupt

48%

Progressive

33%

Modern

24%

#2

Slow to react

26%

Slow to react

26%

Respectful

29%

Trustworthy

22%

#3

Commercial

22%

Political

24%

Modern

26%

Respectful

21%

NA11: Which of these organisations, if any, does this word describe? Which of these words or phrases describe the following organisations?

Base: Football Fans (454), Ice Hockey Fans (648), Cycling Fans (443), Tennis Fans (380)

# Unprompted National Association imagery



- Corruption
- Money
- Euro 2016
- Marek Hamšík
- Ján Kováčik
- Poor local/national stadiums
- Officials



- Igor Nemecek
- Quarrelsome
- Richard Lintner
- Jozef Golonka
- Miroslav Šatan
- World champions
- Politics



- Peter Sagan
- Tour de France
- World champions
- Successful
- Pride
- Quality
- Effort



- Dominika Cibulková
- Daniela Hantuchová
- Women
- Fed Cup
- Youth
- Successful
- Bordeom

NA10: Which of these words or phrases come to mind when you think of the following organisations?

Base: All respondents (1,003)



# What does the SFZ need to do to improve perceptions?

*“Replace all members of the Football Association, focus on the sport and its promotion and not on self-interest and corruption”*



## More inclusive youth football

- “[Provide] much greater support for village youth football, where talents are born”.
- “Take more care of talents regardless of income levels”.
- “Make the first league more accessible to create better playing conditions, independent of parent clubs, and motivate the youth teams to progress”



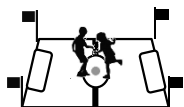
## Improve stadium safety

- “Expel hooligans from the stadiums and introduce better offers for families”
- “[Address] unchecked vandalism and vulgarity in stadiums”
- “Uncompromisingly begin to tackle hooliganism at stadiums”
- “Safety in stadiums is disastrous, at least from what I see and hear in the media”



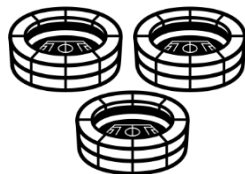
## Address match-fixing and bribery

- “Above all, eliminate match-fixing”
- “Address fraud, match-fixing and the bribery of officials”
- “Ever since the revelations of bribery at the village level, I do not want to even imagine what it is in the higher divisions”



## Generate and distribute income to grassroots

- “More money for the construction of grassroots facilities. After the great success of the 2010 World Cup, all the money from FIFA allocated to pay for the construction of the NFS was nothing, so we have it today. SFZ just waiting for support from the state.”
- “I’m not saying it’s all about the money but the Union should seek to increase funds flowing into the budget (not just [wait for handouts] from the state budget)”







## Promote construction of modern stadiums

- “Stadiums in villages and smaller towns are in a dilapidated condition”
- “Promote new and modern stadiums”
- “Improve the safety of the stadium, bathroom cleanliness and create spaces for visitors with children.

# Success of sporting organisations



	Successful	Not Successful	Don't know
	44%	30%	26%
	38%	41%	22%
	65%	9%	26%
	53%	15%	33%

*On the whole, the Slovak population is very opinionated on the success and reputation of all of the federations with 2/3 of the population offering an opinion on all four federations. This suggests the Slovak population are relatively engaged in the sporting world in general or media reporting on the actions of the associations is quite prevalent.*

*The Slovak ice hockey association is seen as the least successful organisation by a significant margin, which is undoubtedly linked to national team's failure to progress to the play-offs in the 2015 IIHF World Championship.*

*If the Slovak national team does the nation proud in Euro 2016, it could solidify perceptions of the SFZ being more successful than the SZLH for years to come. Organisational reputation and organisational success are closely linked, and as established previously organisational reputation has a significant impact on attendance which of course has a direct impact on revenues.*

# Reputation of sporting organisations



Positive

38%

Negative

36%

Don't know

27%



36%

46%

19%



65%

7%

28%



55%

11%

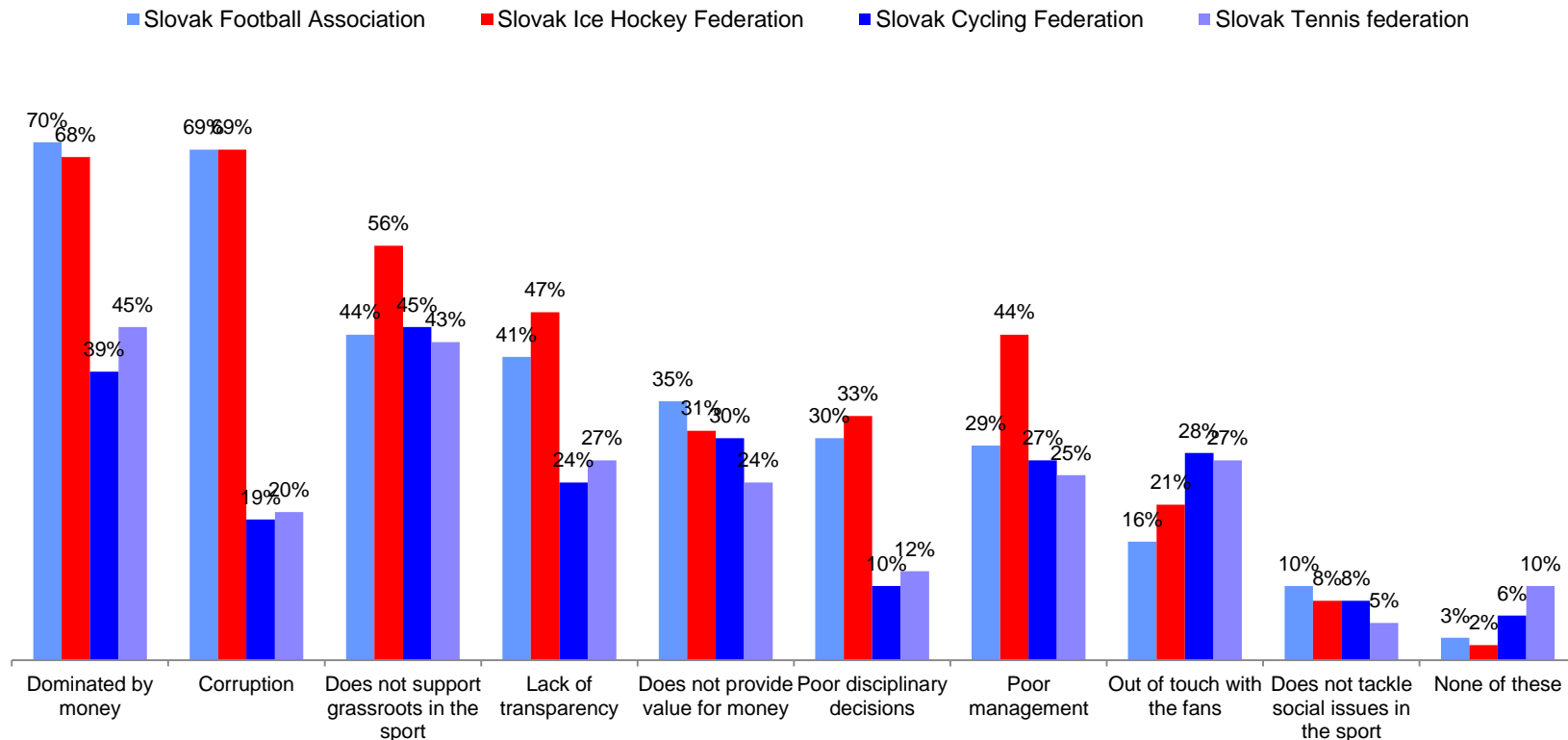
34%

*The reputations of the SFZ and SZLH are seen in a more negative light than their success, which further suggests that negative perceptions of the organisations are driven by off-field factors.*

*In contrast, reputations of the SZC and STZ are seen in a more positive light than their success. Although the successes of Sagan and Cibulková undoubtedly play a role in the positive affinity towards the associations, there is something deeper than that which the SFZ could perhaps learn from.*

*The primary drivers of negative perceptions are corruption and commercialism, and by a significant margin, and so combatting these allegations should be a core focus moving forward.*

# Reasons for poor opinion of organisations



NA30: And why do you have a poor opinion of these organisations?

Base: Slovak Football Association (296), Slovak Ice Hockey Federation (388), Slovak Cycling Federation (85), Slovak Tennis federation (144)

# Key reasons for poor opinions of the SFZ



Dominated by Money

70%



Corruption

69%

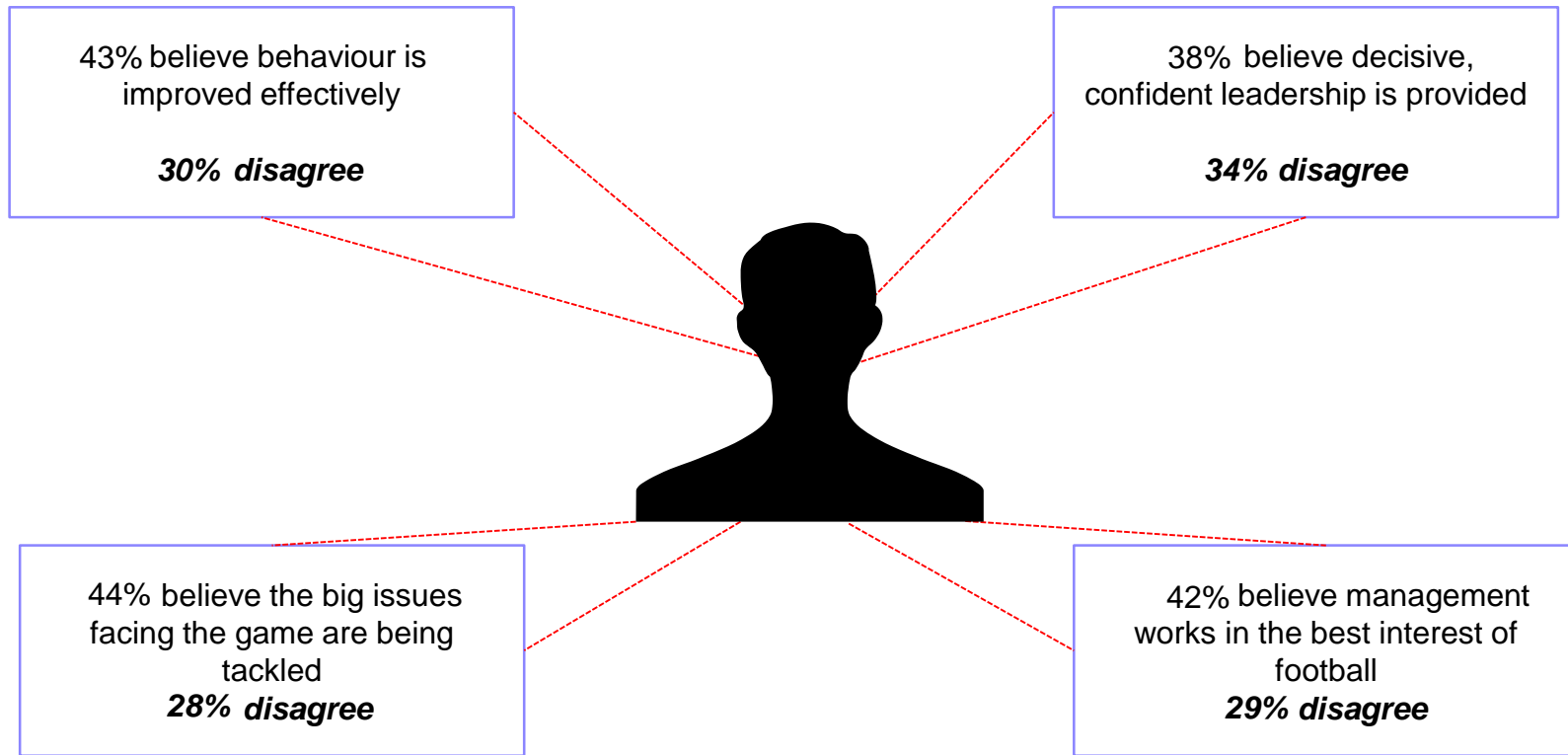


Does not support Grassroots

44%

NA30: And why do you have a poor opinion of these organisations?  
Base: Slovak Football Association (296)

# Attitudes to the overall management of the professional game



NA50: Do you agree or disagree with the following statements about the SFZ's role within the professional game  
Base: Football fans (454)

# Attitudes to children's involvement in football

## Those who believe the SFZ has a positive image

Proportion of parents with a positive image:

50%

67%



"I would take my child to a football match"

79%



"I would let my child watch a football game on TV"

65%



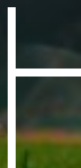
"I would let my child participate in football"

## Those who believe the SFZ has a negative image

Proportion of parents with a negative image:

50%

56%



73%



65%



S70: Do you agree or disagree with the following statement?

Base: Parents with a positive image (133); Parents with a negative image (131)



# Attitudes to grassroots football

## Believe the SFZ...



39%

...ensures a diverse range are playing football  
35% Disagree

37%

...effectively improves quality of pitches  
41% Disagree



38%

...provides more opportunities to participate  
35% Disagree

37%

...improves players quality through coaching and development  
26% Disagree



38%

...develops and supports football  
36% Disagree

35%

...improves football related behaviour on & off the pitch  
37% Disagree



NA51. Do you agree or disagree with the following statements about SFZ's role within grassroots / amateur football?  
Base: Football Fans (454)



# Attitudes to grassroots football

## Believe the SFZ...



34%

...effectively provides access to facilities  
34% Disagree

29%

...effectively improves the quality of coaches & officials in the grassroots game  
28% Disagree



32%

...grows opportunities for women/girls  
22% Disagree

25%

...effectively improves the quality of off-field facilities  
41% Disagree



32%

...is effectively growing the number of coaches/officials/volunteers in the grassroots game  
30% Disagree

NA51. Do you agree or disagree with the following statements about SFZ's role within grassroots / amateur football?  
Base: Football Fans (454)

# Sufficient opportunities to maximise potential for children

In your opinion, are there sufficient opportunities for your children to maximise their football potential in your country?

*Just half of parents believe there are sufficient opportunities for children to maximise their potential. This is likely to be a significant factor in why 1/3 of parents would not be happy to let their children participate in football, which in itself is a significant problem.*

*The SFZ need to engage with parents as a matter of priority to understand what are the drivers of this negative perception of grassroots football. Even among those with a positive opinion of the SFZ overall, there is a reluctance to allow their children to engage in grassroots football which suggests it is something to do with the practices themselves as opposed to any reluctance out of principle.*

Yes 50%

No 36%

Don't know 14%

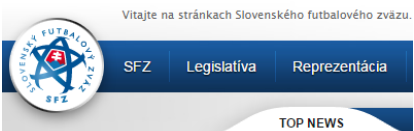
# Communication channels

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# Slovakia communication channels – awareness & quality



Official website

Good

29%

Poor

14%

Unaware/do not use

57%



Facebook

Good

20%

Poor

14%

Unaware/do not use

66%



YouTube channel

Good

12%

Poor

13%

Unaware/do not use

76%



Twitter

Good

7%

Poor

13%

Unaware/do not use

80%



Instagram

Good

9%

Poor

12%

Unaware/do not use

79%

Other forms of media



E-mail newsletters

Good

11%

Poor

15%

Unaware/do not use

74%



Mobile app

Good

12%

Poor

9%

Unaware/do not use

79%

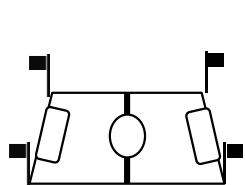
NA40: For each of these communication channels how do you rate Slovakia's use of them? Please consider the quality of content and how frequently you receive/engage with each  
Base: Football fans (454)



**Attitudes to attendance, the SFZ, branded products and more**

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# Attitudes on the venue experience at local live matches



**74%**

Approach to the stadium



**60%**

General experience



**73%**

Domestic match ticket prices



**83%**

Accessibility



**43%**

Seating and sanitary facilities

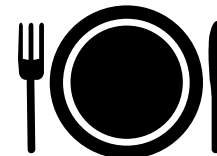
**45%**  
General experience for your family

**39%**  
Entertainment offered

**53%**  
Prices for services offered

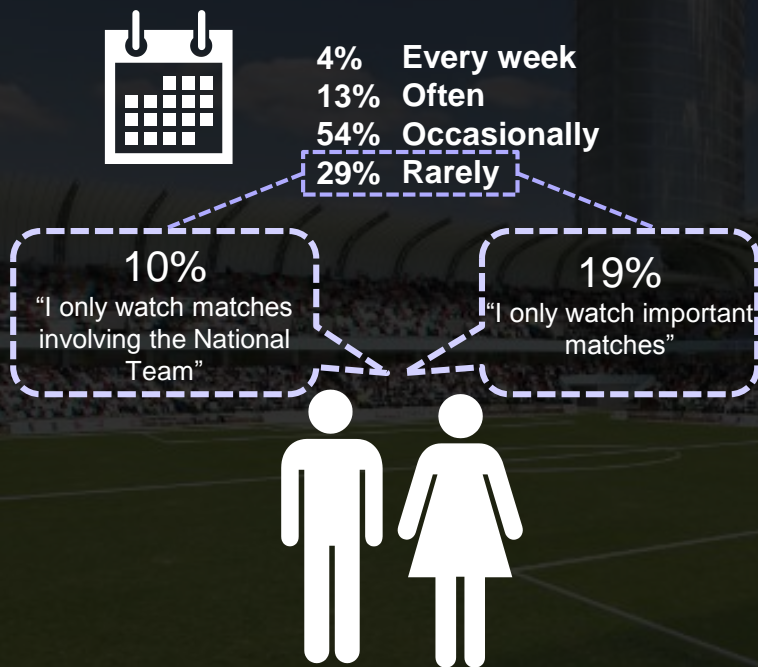
**40%**  
Services offered by ground staff

**31%**  
Catering Services



SK20: Thinking about your local stadium where you attend live matches, how would you rate the following aspects of the venue and stadium experience?  
Base: Match-going football fans (230)

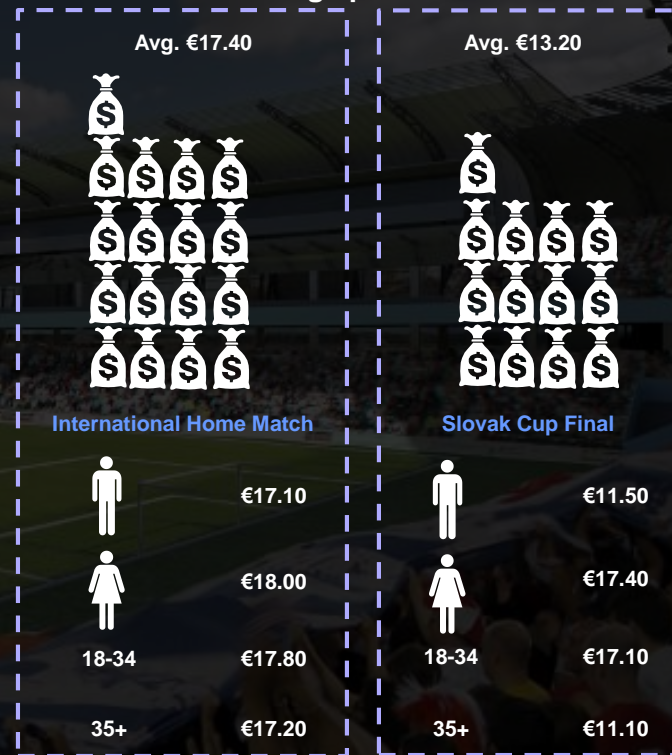
# Frequency of attending local games and fair price of international or cup finals



“How often do you go to watch football at your local stadium?”

SK30: How often do you go to watch football at your local stadium? Base: Match-going football fans (230)  
 SK60: What do you think is a fair average price for an...? Base: Football Fans (454)

What do you think is a fair average price for an...?



# Feeling motivated when the National anthem plays at International matches



Core Football Fans

80%



Parents with children who play football

80%



Parents

79%



Football Players

78%

The image of the National team amongst football fans who feel motivated after hearing the National anthem at International matches

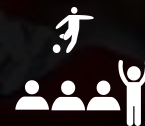
Pride

51%



Great Atmosphere

35%



Exciting

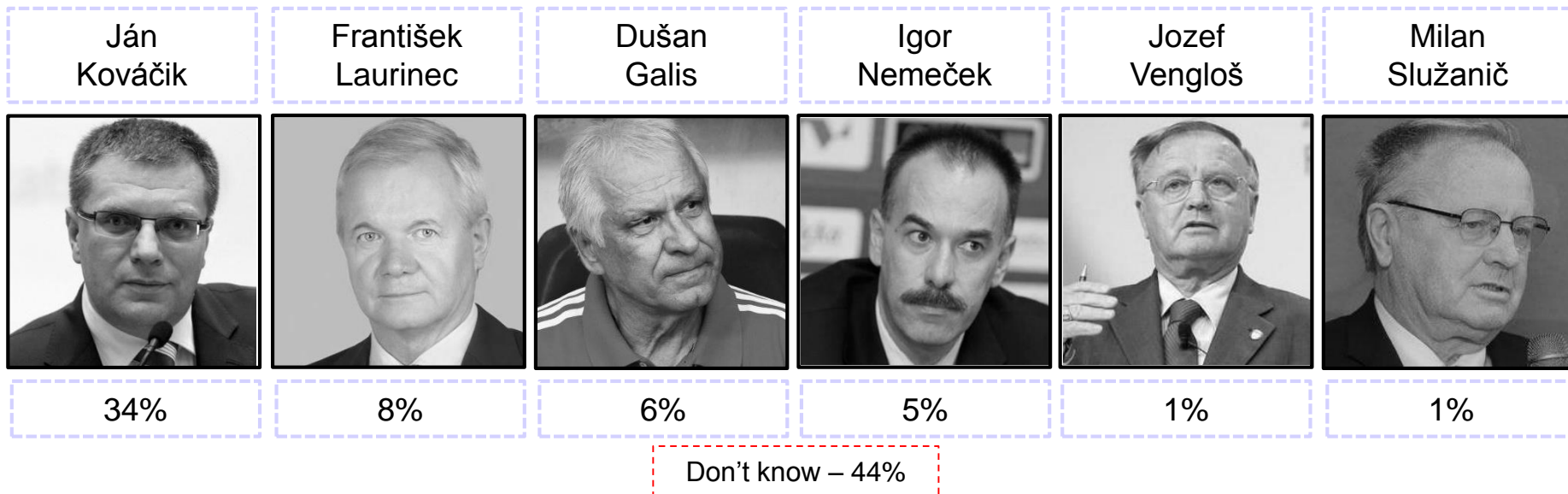
27%



SK50: How do you feel when the national anthem is played at the Slovakia International matches on a scale from 1-5  
Base: Football Fans (454)



# SFZ President Awareness



*Among those aware, there is little confusion that Ján Kováčik is the president.*

*However, nearly half the population are unaware of who holds the presidency for the SFZ. For awareness to improve, the SFZ needs to work on raising Ján Kováčik's profile. Building the new stadium in Bratislava will help overcome some of the negative perceptions the Slovak population currently hold, and having Ján Kováčik as a figure head of these developments should aid awareness, however being seen to take a proactive approach to tackling transparency and corruption issues will also help.*

SK110: Who do you think is the current president of the SFZ?

Base: All respondents (1,002)

# Attitudes to the SFZ



71%

The national team is representative of the whole community



60%

...moved Slovakia football forward in recent years



57%

The SFZ has actively tried to erase Racism from football in the past 4 years



54%

The SFZ is a professional organisation

48%

...perceptions of the SFZ have improved over the past 4 years



44%

Slovakia international matches have become more family orientated



43%

...works for all sides of the community



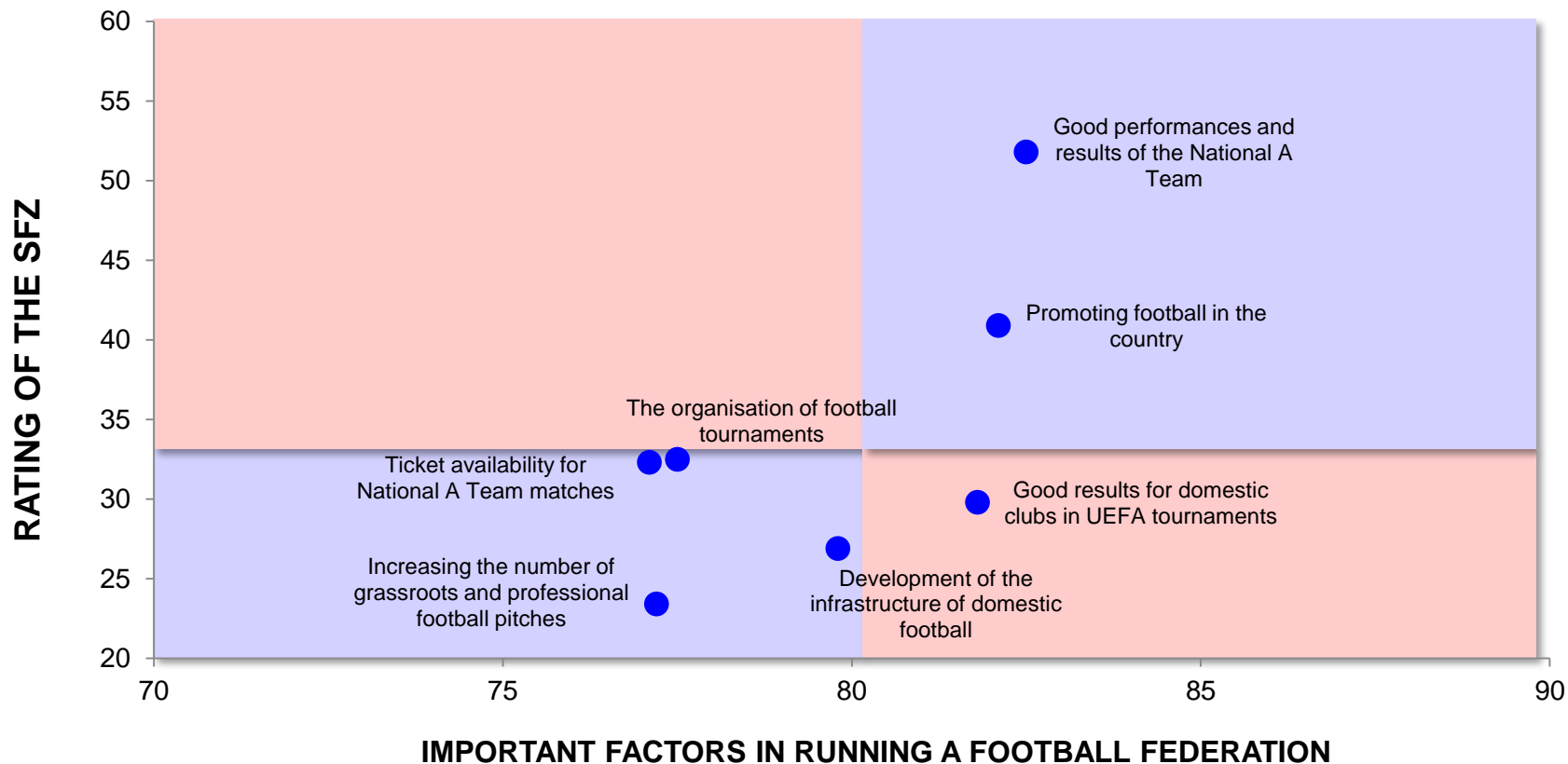
41%

The SFZ is actively involved in the community



SK40: Please state the extent that you agree or disagree with the following statements about the SFZ and the national team within Slovak football.  
Base: Football Fans (454)

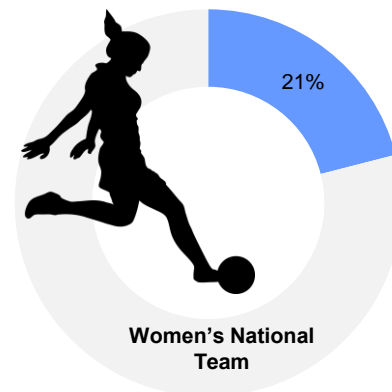
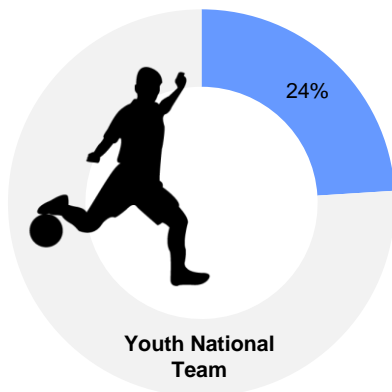
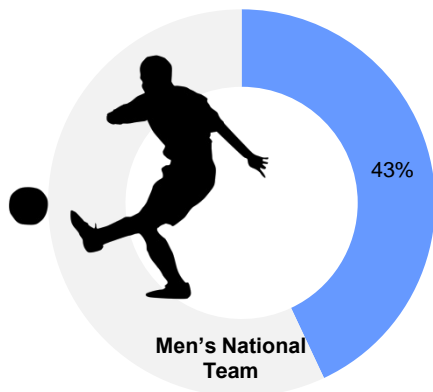
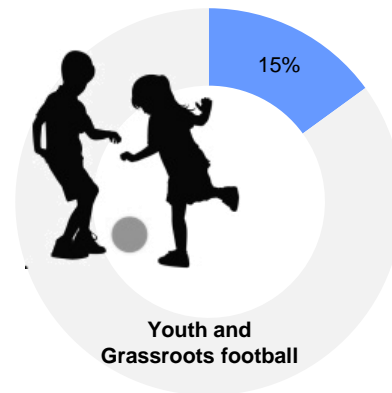
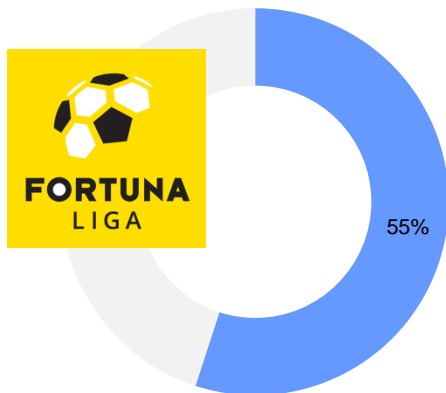
# SFZ performance rating



SK130: How important do you think the following factors are in successfully running a football federation? Base: All respondents (1,002)

SK140: How do you rate the SFZ on each of the below factors? Base: All respondents (1,002)

# Football properties' association to the SFZ



SK100: Which of the following, if any, do you associate with the SFZ (Football Federation of Slovakia)?  
Base: All Respondents (1,002)



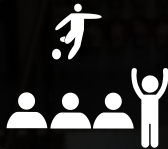
# Likely to purchase branded products



Core Football Fans  
**18%**



Football Players  
**15%**



Football Fans  
**13%**



Parents with children who play football  
**11%**



Parents  
**7%**



62%



38%



18-34

29%



35+

71%

*Core football fans are the most likely to purchase branded products, with nearly two thirds of these being male and over 35.*

*Amongst this group, nearly two thirds are most likely to buy souvenirs and a quarter want National team kits, either current or retro.*

SK120: And how likely are you to buy a retail product branded with the logos or imagery from this football federation?  
Base: All respondents (1,002)

# Branded product consideration



Football fans with a positive image of the SFZ are **17%** more likely to buy any branded product.



Football players are **52%** more likely to buy the National Team football kit compared to football fans.



Parents with children that play football are **57%** more likely to buy souvenirs than football fans.



Those with a negative image of the SFZ are **63%** less likely to buy National team memorabilia than football fans.

*The image of the SFZ has an impact on whether football fans will consider buying branded products, with nearly a fifth more likely to.*

*Euro 2016 will create an excellent opportunity to sell more branded products and the SFZ already has a strong consumer base amongst football players and parents whose children play football.*

SK90: Which of the following products would you consider buying from the Slovak Football Association?  
Base: Football Fans (454)

# Cost of following sports

## Top 3 most expensive sports to follow in Slovakia

#1



#2



#3



*Amongst those rating football as the “most expensive” sport to follow*



Football Players

**33%**



National team Match Attendees

**31%**



Core Football Fans

**26%**



All respondents

**22%**



Parents with children who play football

**18%**

SK10: Please rank the following sports in order of the cost associated with following this sport, principally thinking about the cost of attending live matches.  
Base: All respondents (1,002)

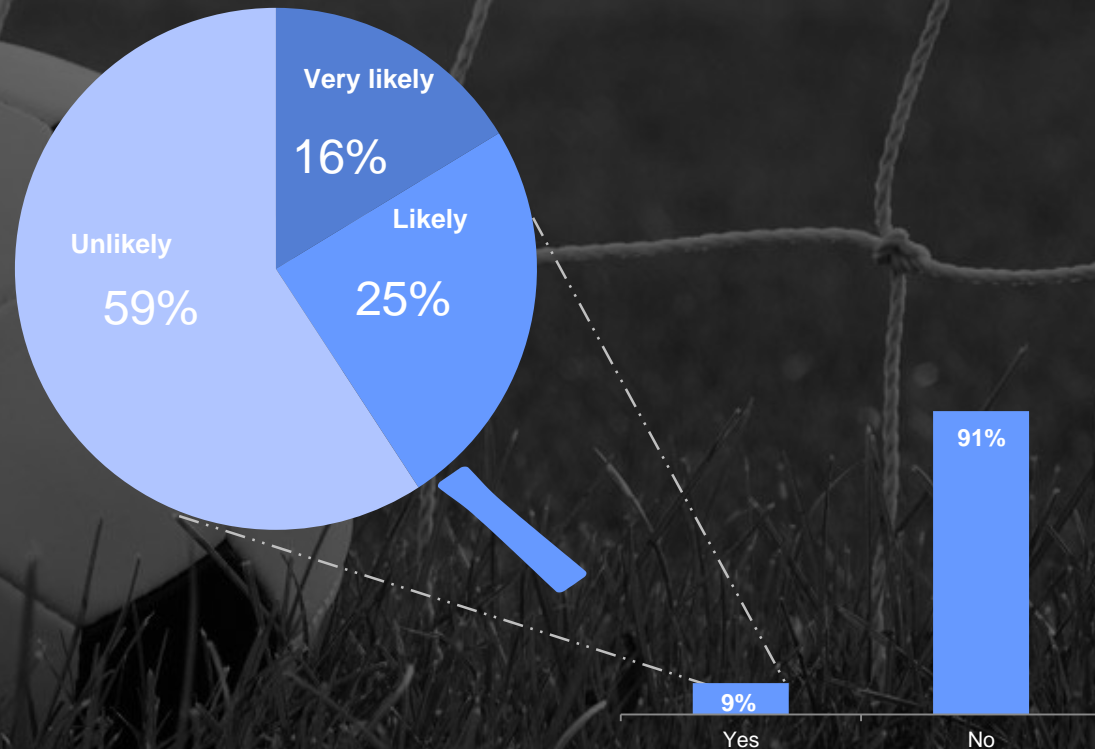


# UEFA Women's Under-19 tournament awareness & attendance

*Awareness in the UEFA Women's Under-19 tournament is low, and amongst those aware likelihood to watch is below half.*

*With 5% of the population interested in women's football this is unsurprising. The adult population state the top two reasons for not following Women's football to be lack of media coverage and lack of awareness of players.*

*The U19 Women's tournament creates a good opportunity for the SFZ to combat these by increasing media coverage around women's football and introducing the players at the same time.*



SK70: Are you aware that the UEFA European Women's Under-19 Football Championship is being held in Slovakia this year? Base: All respondents (1,002)

SK80: And how likely are you to attend a UEFA European Women's Under-19 Football Championship match? Base: Tournament Aware (91)



# National Team following



26%

I read/get the news about National "A" Team from media



25%

I watch all the of the National "A" Team on TV



3%

I have a National "A" Team Jersey

2%

I attend all home matches of the National "A" Team



1%

I'm a member of a non-official fan-club in my city/town/village



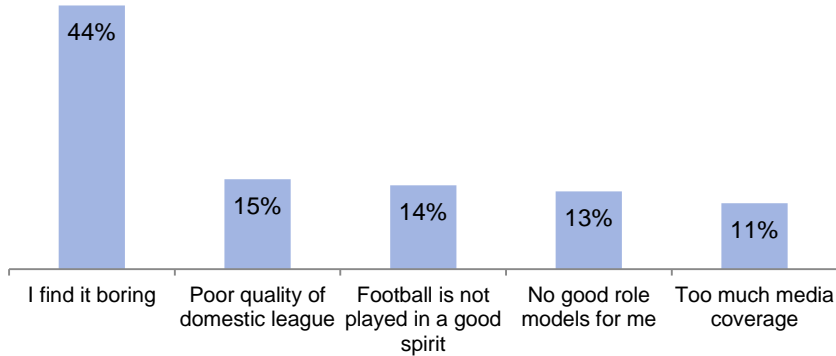
SK150: Which of the below-mentioned phrases describes your personal attitude to the National "A" Team?  
Base: All Respondents (1,002)

# Appendices

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# Top 5 reasons for lack of interest in football



S80: You said earlier that you have no interest in football. Which, if any, of the following are reasons why?

Base: Non football fans (548)

Ste...



[r1] Muž



[r2] Žena

Koľko máte rokov?

# Kde žijete?

Kliknite na oblasť alebo mesto, ktoré sa vzťahuje na vás.

[r1] Bratislavský	[r2] Trnavský	[r3] Trenčiansky	[r4] Nitriansky	[r5] Banskobystrický	[r6] Žilinský
[r7] Košický	[r8] Prešovský				

# Ktorý z týchto športov sledujete? Sledovanie znamená čokoľvek od podpory tímu/hráča po sledovanie športu v TV, čítanie o športe v novinách alebo on-line.

Vyberte všetky hodiace sa odpovede

									
Atletika	Bedminton	Basketbal	Box	Kríket	Cyklistika	Pozemný hokej	Krasokorčufovanie	Futbal	Golf
					 union				
Gymnastika	Hádzaná	Ľadový hokej	Bojové športy (MMA)	Motoristický šport (F1, Moto GP, WRC, NASCAR, Indy Car, V8 Supercars)	Rugby Union	Lyžovanie (vrátane biatlonu a behu na lyžiach)	Snowboarding	Plávanie	Stolný tenis
									
Tenis	Triatlon	Volejbal	Hokej na kolieskových korčuľiach	Florbal	Vodný slalom	Iné	Nesledujem žiadne športy		

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**Thank you!**