

# Football Federation Australia

## Customer Growth Program: Lapsed Participants

*Market research key insights report*

Prepared for: Football Federation Australia and Member Federations

Prepared by: Sport Business Partners

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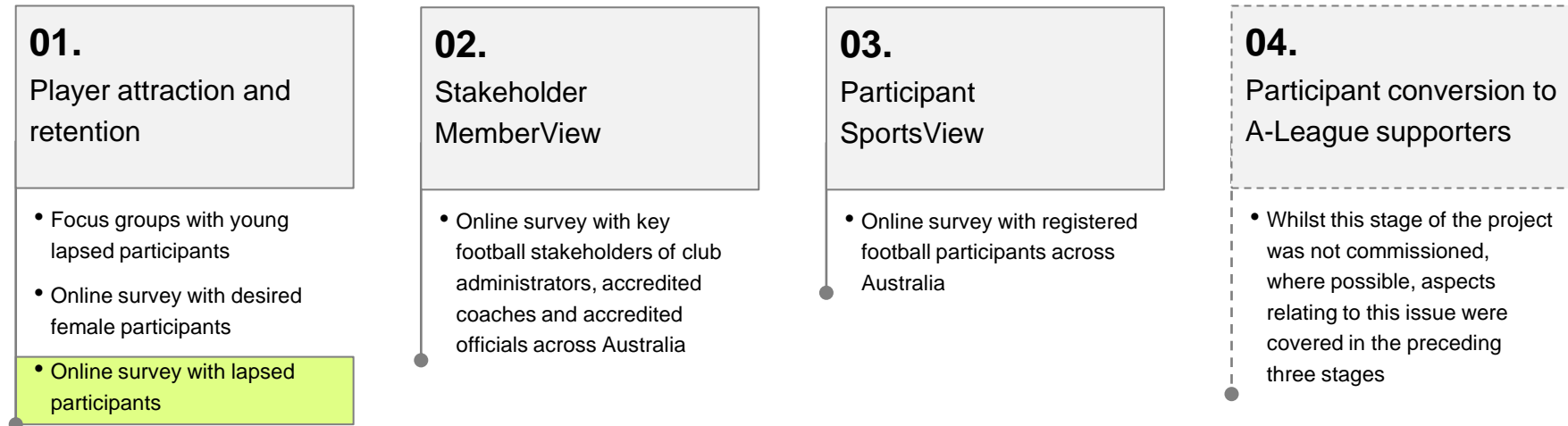


# Introduction

## Project background

In 2012, Football Federation Australia (FFA) and its Member Federations commissioned Sport Business Partners (SBP) to conduct a national customer growth program (combining market research, evaluation and advisory approaches). The objective was to understand a series of participant, stakeholder and fan engagement attitudes and opinions which need to be addressed in order to grow the game and the 'Football Economy'.

The project involved three stages overall:



**This document reports on the insights uncovered from the online survey with lapsed football participants from the stage one player attraction and retention phase of the project.**

## Project background

At a strategic level the primary objective of this survey was to:

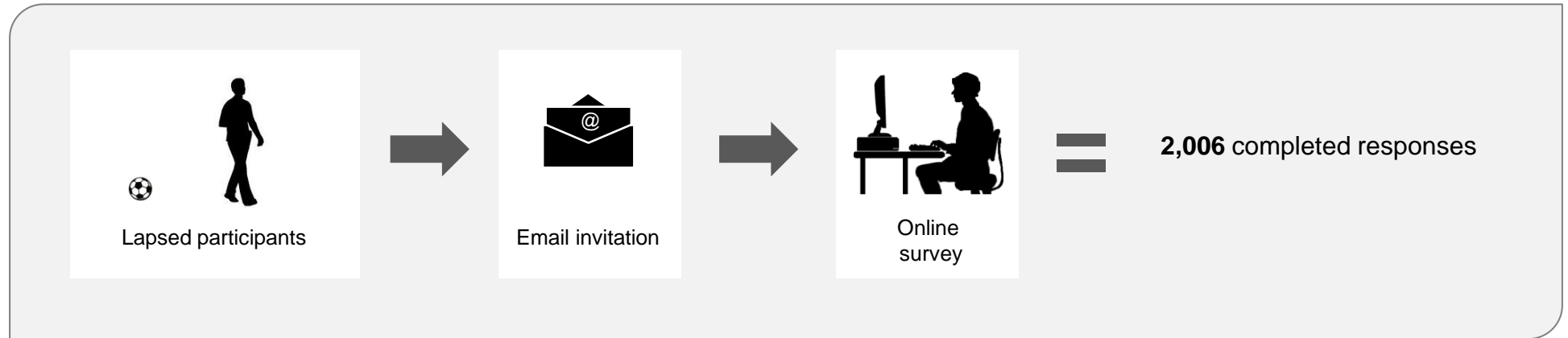
**“Identify the reasons and contributing factors as to why players of all ages drop-out of the game”**

Within this primary objective, the following specific objectives were addressed:

- Identify and understand the strengths and weakness of the football experience
- Understand the components of the football experience that are causing discontinuation of football (key barriers)
- Understand the influences and considerations impacting on the decision to not participate
- Understand the components of the football experience which have a positive impact on player retention
- Understand the relationship between the customer experience and customer behaviour
- Provide the opportunity to articulate the factors that would result in the lapsed players returning to the sport.



## Project methodology



### Notes

- The total respondent quota was  $n = 2,000$ .
- For each member federation involved in this project, quotas were established to reflect their respective financial contribution to the project overall, whilst maintaining satisfactory research standards.
- Parents/guardians were invited to respond on behalf of their child where the lapsed participant was 14 years of age or less.
- The online survey launched on Tuesday 31 July 2012 and completed surveys were received up to Monday 13 August 2012 at which point the quota of 2,000 completed responses was reached.
- Project management, questionnaire development, fieldwork management, analysis and reporting for this stage of the project was conducted by Sport Business Partners.

## Respondent profile

Respondents to this research were sourced through the MyFootball database, which was supplied by the Football Federation Australia.

	Total		Gender				Age									
	2012		Male		Female		5-9		10-14		15-19		20-34		35+	
Member Federation																
Victoria	447	22 %	351	24 %	96	19 %	77	19 %	158	27 %	92	23 %	70	20 %	50	19 %
NSW	451	23 %	330	22 %	121	23 %	83	20 %	102	18 %	81	21 %	96	27 %	89	34 %
QLD	360	18 %	268	18 %	92	18 %	86	21 %	119	21 %	65	17 %	61	17 %	29	11 %
Northern NSW	315	16 %	234	16 %	81	16 %	73	18 %	83	14 %	61	15 %	51	14 %	47	18 %
ACT	217	11 %	139	9 %	78	15 %	53	13 %	38	7 %	49	12 %	50	14 %	27	10 %
Western Australia	216	11 %	165	11 %	51	10 %	40	10 %	76	13 %	47	12 %	29	8 %	24	9 %
Total	2006	100 %	1487	100 %	519	100 %	412	100 %	576	100 %	395	100 %	357	100 %	266	100 %
Format recently stopped playing																
Small Sided Football (football for 5 to 11 year olds)	477	24 %	381	26 %	96	19 %	339	82 %	138	24 %	0	0 %	0	0 %	0	0 %
Schools 5-a-side	9	0 %	6	0 %	3	1 %	3	1 %	4	1 %	1	0 %	1	0 %	0	0 %
Football Fives (5-a-side)	21	1 %	14	1 %	7	1 %	9	2 %	7	1 %	1	0 %	2	1 %	2	1 %
Outdoor (7-a-side)	140	7 %	102	7 %	38	7 %	47	11 %	71	12 %	6	2 %	9	3 %	7	3 %
Outdoor (11-a-side)	1302	65 %	937	63 %	365	70 %	10	2 %	339	59 %	375	95 %	327	92 %	251	94 %
Futsal	41	2 %	34	2 %	7	1 %	3	1 %	14	2 %	8	2 %	12	3 %	4	2 %
Indoor Soccer	15	1 %	13	1 %	2	0 %	1	0 %	3	1 %	3	1 %	6	2 %	2	1 %
Indigenous football program	0	0 %	0	0 %	0	0 %	0	0 %	0	0 %	0	0 %	0	0 %	0	0 %
Disability football program	1	0 %	0	0 %	1	0 %	0	0 %	0	0 %	1	0 %	0	0 %	0	0 %
Total	2006	100 %	1487	100 %	519	100 %	412	100 %	576	100 %	395	100 %	357	100 %	266	100 %

Key insights



## Key insights into lapsed participants

1. **Football's recently lapsed participants are by no means 'lost' to the broader football economy as either participants or fans.** Approximately one third of respondents between 10 and 19 years of age are still playing football at school – so whilst they are officially classified as a lapsed participant according to affiliated FFA registration, they are still engaged with the game. On the other hand whilst lapsed participants 20 years of age or over are less likely to still be playing, they retain a large interest in the game (with seven out of ten being classified as having a 'high interest' in the game), and have high levels of fandom (support of football teams, leagues or competitions) and consumption of the sport through media channels. The challenge for FFA is to maintain lines of communication with lapsed participants for when they are ready to re-engage with the game as a participant, or to deliver products and services that appeal to them as a spectator.
2. **Football's 'deliverers' (i.e. Clubs and Associations) do not appear to understand the importance of player retention.** This is demonstrated by the fact that 67% of all lapsed players were not contacted by anybody from their most recent club to ask if there was a way that they could keep them involved as a player. This increases to 80% of children 5-14 years of age who were not contacted by anyone from their club. Whilst footballs 'older' lapsed participants are likely to remain engaged as a consumer or have a higher possibility of re-engaging in the future, it is a significant concern for football that its participants which are most vulnerable to becoming lost to the game (as a consumer and/or a participant) are allowed to leave the game without any meaningful attempt made to retain them.
3. **Over half of all lapsed participants say that their experience playing football in their last season had an influence on their decision not to play in this current season.** Equally 56% of lapsed player made the decision to stop playing during the middle, or right at the end, of their most recent season which suggests that there were negative perceptions or experiences that lead to them deciding to stop playing.
4. **For one third of lapsed 5-9 year old players the main reason for stopping was to play another sport.** This percentage rose to 44% who said that wanting to play another sport was a secondary reason for stopping. Whilst eight out of ten lapsed players from this age group had played for less than two years, they also had the lowest likelihood of playing football again within the next twelve months – just 13% being certain to/very likely to play again. It appears that many children at this age are 'sampling' a wide variety of sports and that internal football factors are not the direct cause of their lapsed participation – however, of some concern is that the value proposition of participating has not been sufficient to retain these participants.

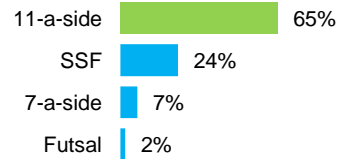
## Key insights into lapsed participants

5. **The 10-14 year old lapsed participant segment is more likely to be affected by negative experiences with the game compared to all other age segments.** Whilst one quarter say that they stopped playing because they wanted to play another sport, there are also a number of prominent secondary influences which include the poor quality of coaching (27%), the poor club environment/culture (23%) and issues relating to unequal competition such as team playing in the wrong grade (17%), it got too competitive (15%) and an individual playing in the wrong grade (13%). This age group had the lowest level of overall satisfaction with the playing experience (63% compared to 71% for all lapsed players), the highest rating of their experience of the previous football season negatively influencing their decision to stop playing (43% a lot of influence compared to 34% for all lapsed players) and a low likelihood of playing again within the next twelve months (just 15% being certain to/very likely to play again). A retention strategy for this age group in particular should be developed in order to address their negative experiences with the game.
6. **Almost six out of ten lapsed participants between the ages of 20-34 years are likely to play again within the next twelve months.** 67% of these players have been involved as a player for over ten years and are less likely to be influenced to stop playing because of negative experiences with the game – the dominant reason provided for stopping is injuries. Whilst many in this age group are classified as a lapsed participant, they remain highly engaged with the game and should be regarded as a potentially lucrative consumer of the sport.
7. **The consumption of football as a fan is extremely low amongst lapsed participants under 10 years of age.** Just 13% of 5-9 year olds actively follow or support the A-League (24% of 10-14 year olds) and 64% do not follow any format of football through any media communication channels (45% of 10-14 year olds). Football consumption is relatively high amongst lapsed players 20 years of age or older, however they are more likely to actively follow or support an overseas league than the A-League.

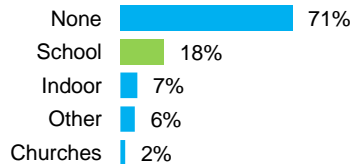
**Final observations:** In order to retain lapsed participants the most effective short-term initiative is likely to be to develop and education program for Club Coaches and Administrators on the importance of player retention and to provide basic methods or strategies on how to retain players. This may involve utilising the national player database to conduct a brief end-of-each season player survey to identify the likelihood of continuing and the reasons that they may not do so. This information should be localised and made available to each club with basic strategies on how to address key issues identified.

# Summary of key charts

## Format recently stopped



## Currently still playing



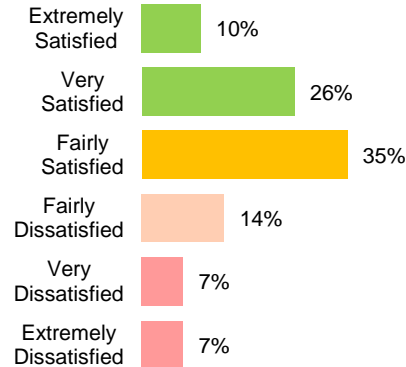
## Likelihood of playing again within 12 months



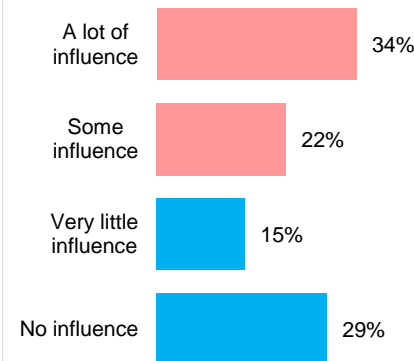
## Point in time decided to stop playing



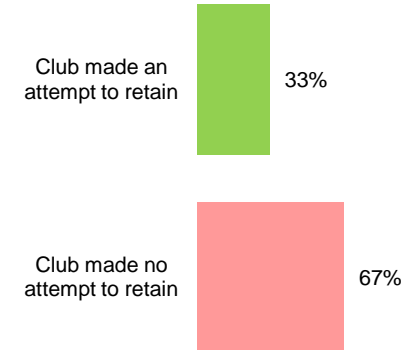
## Satisfaction with recent playing experience



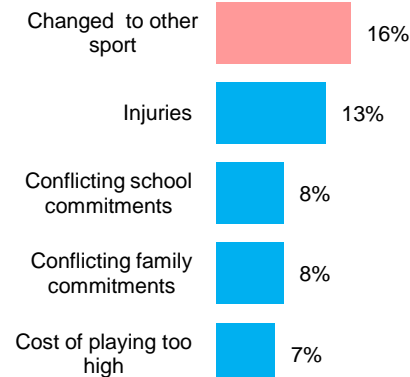
## Influence of experience last season on stopping



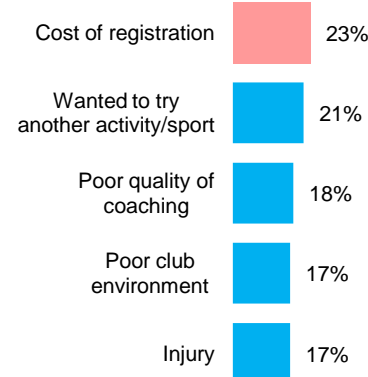
## Club retention attempt



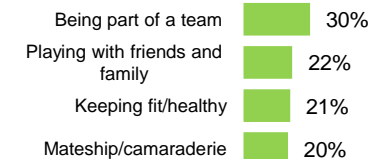
## Main reason for stopping



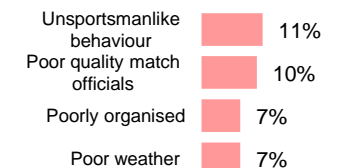
## Other reasons for stopping



## Best parts of playing



## Worst parts of playing

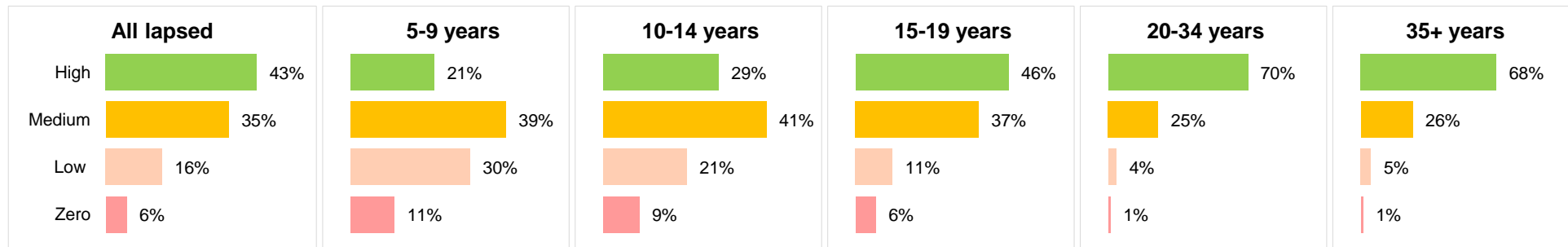




# Detailed findings

# **Football profile**

# Level of interest in football

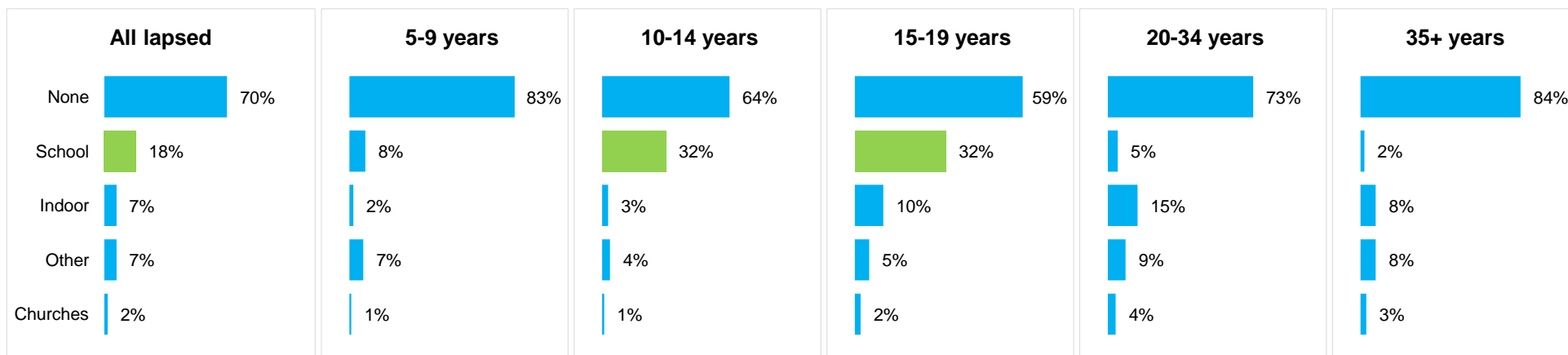


Overall level of interest in football	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
10 (Very interested)	20%	22%	14%	7%	8%	23%	38%	35%	8%	30%	42%	5%	19%	21%
9	9%	10%	7%	5%	8%	9%	13%	15%	7%	10%	16%	3%	8%	13%
8	14%	14%	16%	9%	13%	15%	19%	18%	11%	16%	17%	12%	16%	24%
7	12%	11%	15%	8%	13%	13%	14%	14%	11%	12%	12%	10%	17%	19%
6	8%	8%	9%	10%	9%	10%	5%	7%	9%	9%	4%	9%	10%	9%
5	10%	9%	10%	13%	12%	10%	4%	6%	13%	8%	4%	13%	11%	5%
4	5%	5%	4%	8%	7%	3%	2%	0%	8%	2%	1%	8%	3%	2%
3	7%	8%	6%	10%	11%	6%	3%	2%	12%	4%	2%	7%	6%	3%
2	6%	5%	8%	12%	7%	3%	1%	3%	7%	2%	2%	16%	4%	2%
1	3%	3%	4%	7%	4%	2%	0%	0%	5%	2%	0%	6%	2%	1%
0 (Not at all interested)	6%	6%	7%	11%	9%	6%	1%	1%	10%	4%	0%	10%	6%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean Score	6.3	6.4	6.0	4.5	5.4	6.7	8.2	8.1	5.1	7.2	8.4	4.6	6.5	7.5
High (10-8)	43%	45%	37%	21%	29%	46%	70%	68%	27%	56%	75%	21%	42%	58%
Medium (7-4)	35%	33%	39%	39%	41%	37%	25%	26%	40%	31%	22%	40%	41%	34%
Low (3-1)	16%	15%	18%	30%	21%	11%	4%	5%	24%	8%	4%	30%	12%	6%
Zero (0)	6%	6%	7%	11%	9%	6%	1%	1%	10%	4%	0%	10%	6%	2%



# Currently still playing football

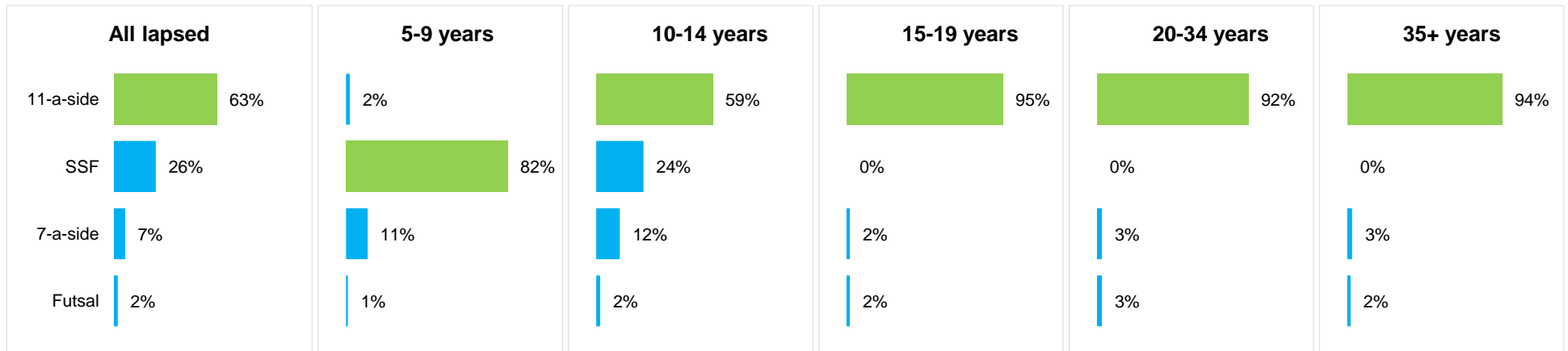
Whilst 70% of all lapsed players did not play any other form of football during 2012, it is positive to note that approximately two thirds of lapsed players between 10-19 years of age did play school football highlighting that they are not completely lost to the game.



Format of football currently still playing	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
None	71%	70%	75%	83%	64%	59%	73%	84%	70%	60%	78%	80%	63%	84%
School football	18%	18%	19%	8%	32%	32%	5%	2%	23%	25%	2%	18%	29%	3%
Indoor soccer (not Futsal)	7%	7%	5%	2%	3%	10%	15%	8%	3%	16%	10%	0%	6%	12%
Other unaffiliated competition or association	6%	7%	4%	7%	4%	5%	9%	8%	6%	6%	10%	2%	6%	4%
Churches football league	2%	2%	1%	1%	1%	2%	4%	3%	1%	3%	3%	1%	2%	1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

# Format recently stopped playing

As would be expected, the majority of lapsed players nine years of age or under recently stopped playing Small Sided Football, whilst for lapsed players 15 years of age or over, they recently stopped playing Outdoor 11-a-side football.

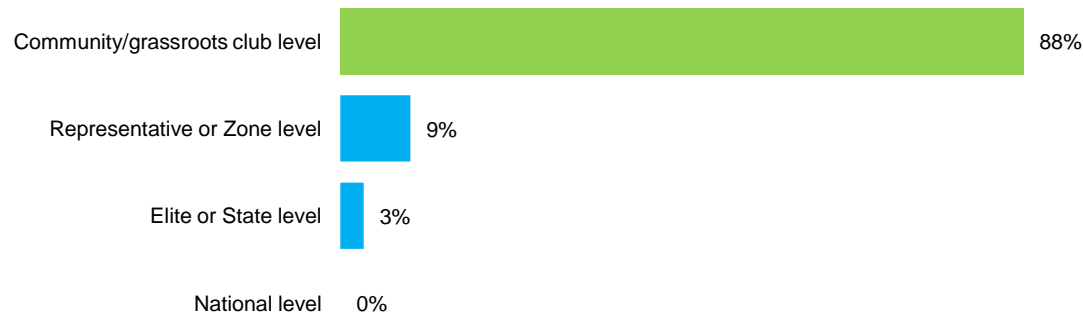


Format of football recently stopped playing	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Outdoor (11-a-side)	65%	63%	70%	2%	59%	95%	92%	94%	35%	94%	95%	38%	93%	89%
Small Sided Football (football for 5 to 11 year olds)	24%	26%	19%	82%	24%	0%	0%	0%	49%	0%	0%	47%	0%	0%
Outdoor (7-a-side)	7%	7%	7%	11%	12%	2%	3%	3%	12%	2%	1%	12%	2%	8%
Futsal	2%	2%	1%	1%	2%	2%	3%	2%	2%	2%	2%	0%	3%	2%
Football Fives (5-a-side)	1%	1%	1%	2%	1%	0%	1%	1%	2%	0%	0%	2%	1%	1%
Indoor Soccer	1%	1%	0%	0%	1%	1%	2%	1%	1%	2%	1%	0%	1%	1%
Schools 5-a-side	0%	0%	1%	1%	1%	0%	0%	0%	1%	0%	0%	1%	1%	0%
Indigenous football program	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Disability football program	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%

# Level recently stopped playing

The majority of lapsed players (88%) played at the community/grassroots club level football prior to stopping. A small number (9%) had played representative or zone football – with males and females 14-24 years of age most likely to have played at this level.

Level recently stopped playing – all lapsed players



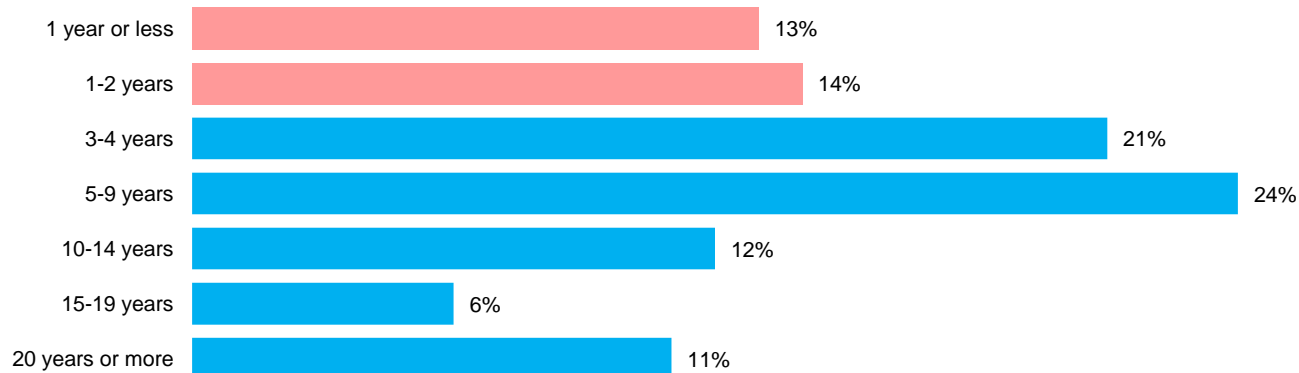
Level of football recently stopped playing	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Community/grassroots club level	88%	88%	88%	99%	92%	77%	78%	91%	94%	76%	85%	98%	76%	91%
Representative or Zone level	9%	10%	9%	1%	7%	18%	15%	7%	6%	19%	10%	2%	17%	8%
Elite or State level	3%	3%	3%	0%	1%	5%	7%	3%	0%	6%	5%	1%	7%	1%
National level	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%



# Duration of participation

A significant concern for football is that 42% of children between 5-9 years of age stopped playing football after having played for one year or less. Females in particular 14 years of age or younger are more likely to stop playing after one year or less.

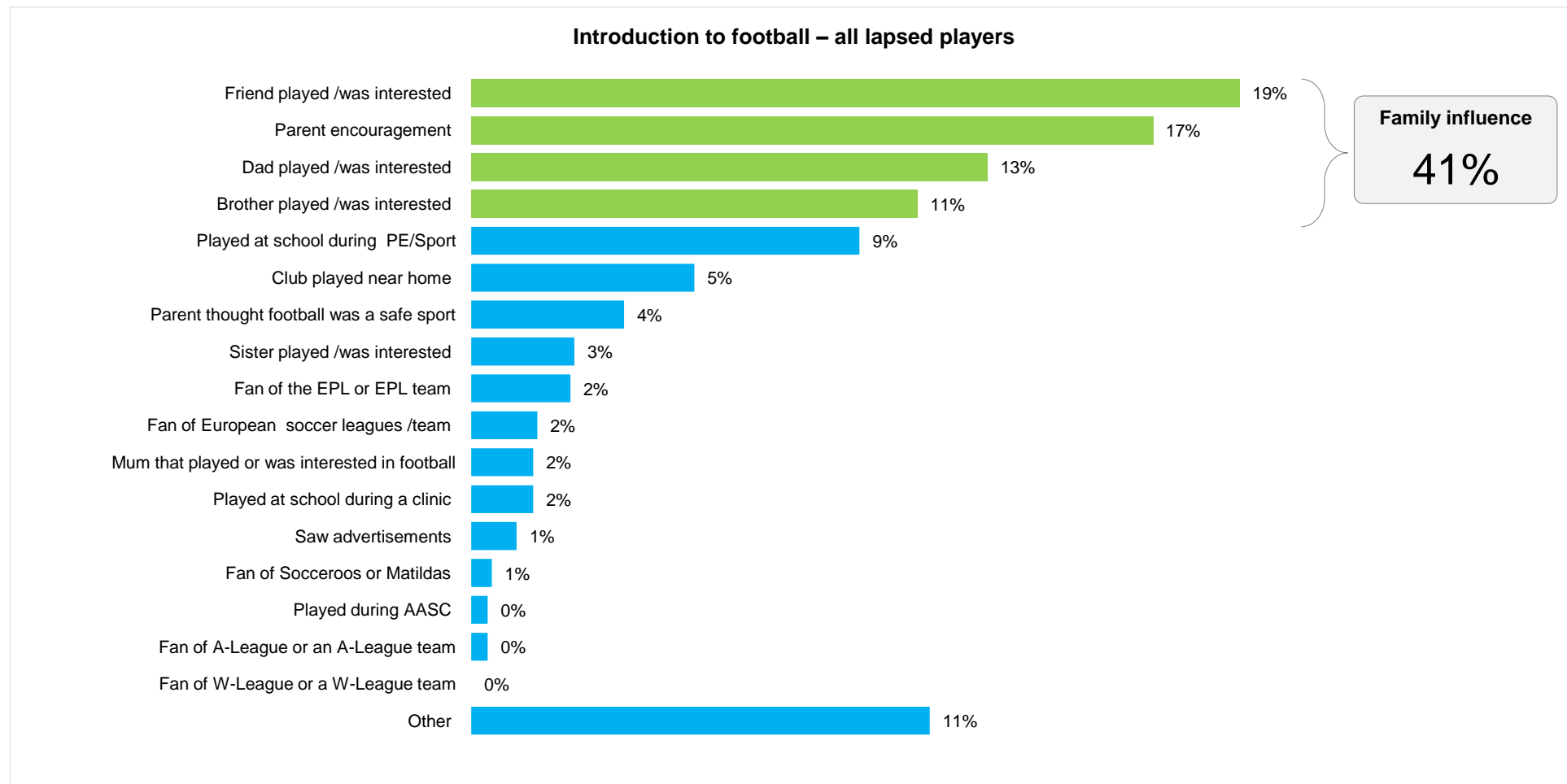
Duration of participation – all lapsed players



Duration of historical football participation	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
1 year or less	13%	12%	18%	42%	10%	4%	3%	4%	20%	3%	2%	36%	4%	8%
1-2 years	14%	13%	18%	38%	15%	6%	3%	2%	22%	4%	1%	33%	8%	7%
3-4 years	21%	20%	24%	20%	36%	18%	9%	11%	31%	10%	5%	23%	24%	26%
5-9 years	24%	23%	25%	1%	39%	40%	18%	12%	27%	32%	9%	8%	43%	26%
10-14 years	12%	12%	10%	0%	1%	31%	23%	9%	1%	41%	12%	0%	17%	15%
15-19 years	6%	6%	4%	0%	0%	2%	23%	9%	0%	10%	16%	0%	5%	9%
20 years or more	11%	14%	2%	0%	0%	0%	21%	53%	0%	1%	55%	0%	0%	8%

# Introduction to football

The most significant influence on introducing players to football is through social networks – that is a connection through friends or family who play or are interested in the sport.



# Introduction to football - detail

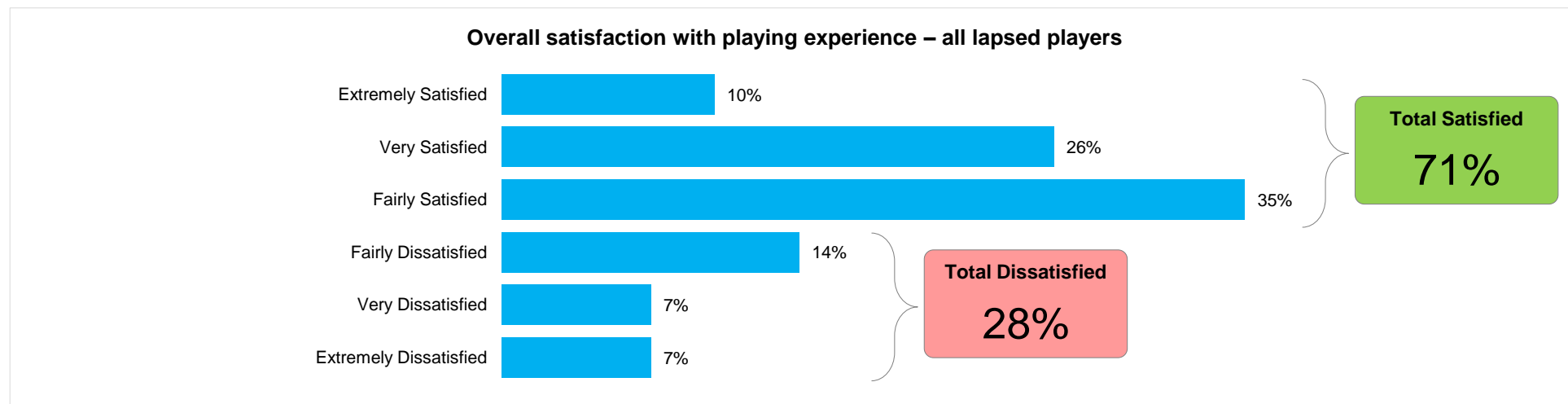
Females in particular are more likely to have been influenced to play by a friend in general or a brother. Females over the age of 25 are significantly more likely to have been influenced by a friend in particular.

Main influence on introduction to football	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Friend played /was interested	19%	16%	25%	20%	18%	15%	21%	20%	18%	14%	15%	23%	20%	38%
Parent encouragement	17%	19%	9%	16%	21%	15%	15%	11%	21%	19%	16%	11%	10%	2%
Dad played /was interested	13%	14%	8%	9%	12%	14%	16%	13%	12%	16%	18%	6%	11%	6%
Brother played /was interested	11%	9%	16%	18%	11%	10%	7%	5%	12%	7%	5%	23%	15%	7%
Played at school during PE/Sport	9%	9%	10%	6%	9%	12%	12%	9%	8%	11%	10%	7%	13%	11%
Club played near home	5%	6%	4%	5%	4%	8%	4%	8%	5%	7%	8%	3%	7%	2%
Parent thought football was a safe sport	4%	5%	1%	5%	4%	3%	3%	5%	5%	6%	4%	1%	1%	0%
Sister played /was interested	3%	1%	7%	2%	4%	3%	2%	1%	2%	1%	0%	9%	6%	6%
Fan of the EPL or EPL team	2%	3%	1%	1%	2%	3%	4%	2%	2%	6%	3%	1%	1%	1%
Fan of European soccer leagues /team	2%	2%	1%	1%	1%	2%	2%	5%	1%	2%	4%	0%	1%	2%
Mum that played or was interested in football	2%	2%	2%	4%	2%	1%	0%	0%	2%	1%	0%	3%	1%	1%
Played at school during a clinic	2%	2%	1%	2%	2%	2%	1%	1%	2%	2%	1%	3%	1%	1%
Saw advertisements	1%	1%	2%	2%	2%	1%	1%	1%	2%	0%	0%	2%	1%	3%
Fan of Socceroos or Matildas	1%	0%	1%	0%	1%	1%	0%	0%	1%	0%	0%	1%	2%	0%
Played during AASC	0%	1%	0%	0%	1%	1%	0%	0%	1%	1%	0%	0%	0%	1%
Fan of A-League or an A-League team	0%	1%	0%	1%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%
Fan of W-League or a W-League team	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	11%	10%	14%	9%	9%	Total	12%	20%	9%	7%	16%	10%	14%	20%



# Satisfaction with playing experience

One third of former participants were 'fairly satisfied' with their overall playing experience whilst 28% are 'Dissatisfied' in total, which indicates that there are relatively few lapsed players who had an overwhelmingly positive experience with the game.



Overall satisfaction with the playing experience	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	10%	9%	12%	9%	8%	13%	10%	11%	8%	13%	9%	11%	12%	15%
Very Satisfied	26%	26%	27%	26%	24%	31%	22%	27%	24%	28%	27%	28%	26%	27%
Fairly Satisfied	35%	35%	36%	38%	31%	30%	40%	41%	34%	32%	40%	35%	36%	40%
Fairly Dissatisfied	14%	15%	14%	16%	16%	11%	15%	12%	16%	11%	15%	16%	14%	11%
Very Dissatisfied	7%	8%	4%	6%	9%	5%	8%	5%	9%	8%	7%	3%	3%	4%
Extremely Dissatisfied	7%	8%	6%	6%	11%	9%	5%	3%	9%	9%	4%	7%	7%	3%
Don't know	0%	0%	1%	0%	1%	1%	0%	0%	0%	0%	0%	0%	2%	0%
Total satisfied	71%	69%	76%	73%	63%	75%	72%	79%	65%	73%	75%	73%	74%	82%
Total Ext/very satisfied	36%	35%	39%	35%	32%	44%	32%	38%	32%	41%	35%	39%	38%	42%

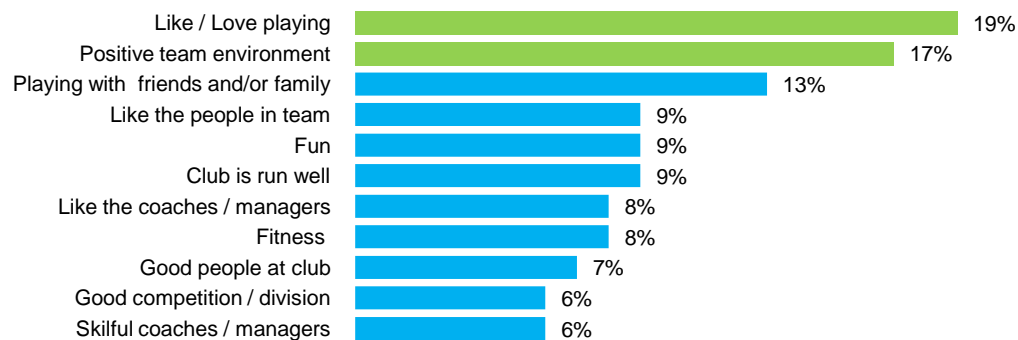
Q18. How satisfied or dissatisfied were you with your most recent experience of playing football (over the duration of the season)? (n=2,006)

2012 FFA Lapsed Participant Survey • September 2012 • Commercial-in-Confidence

# Reasons for positive satisfaction

A love or like for playing the game was the most common reason for providing a positive satisfaction rating of their experience of playing football. A positive team environment and fitness is also important, particularly for females aged 14 and above.

**Reasons for positive satisfaction rating – all lapsed players**



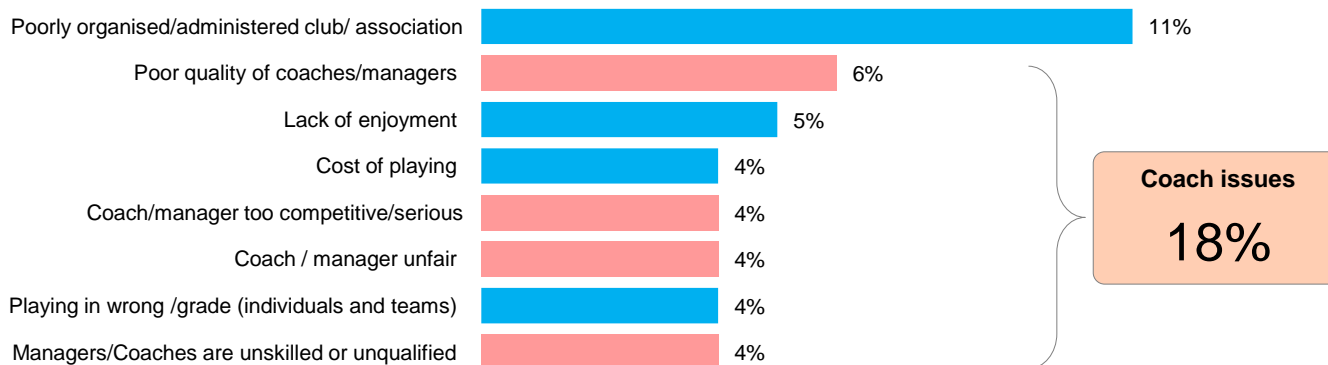
Reasons for a positive satisfaction rating	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Like / Love playing	19%	19%	19%	19%	17%	24%	19%	18%	17%	25%	18%	18%	20%	20%
Positive team environment	17%	16%	21%	17%	17%	18%	14%	20%	17%	15%	14%	18%	23%	24%
Playing with friends and/or family	13%	14%	10%	16%	12%	14%	11%	9%	15%	15%	10%	11%	9%	8%
Like the people in team	9%	8%	12%	4%	6%	11%	13%	15%	5%	8%	14%	8%	14%	17%
Fun	9%	7%	14%	13%	5%	11%	9%	8%	8%	8%	5%	9%	14%	20%
Club is run well	9%	8%	10%	12%	5%	8%	13%	8%	8%	8%	10%	9%	9%	13%
Like the coaches / managers	8%	7%	9%	7%	13%	9%	5%	0%	10%	7%	1%	11%	8%	7%
Fitness	8%	6%	12%	3%	4%	9%	10%	19%	3%	5%	14%	5%	15%	19%
Good people at club	7%	7%	8%	9%	4%	6%	8%	11%	6%	6%	9%	8%	6%	11%
Good competition / division	6%	6%	7%	3%	3%	7%	10%	11%	4%	6%	11%	2%	11%	10%
Skilful coaches / managers	6%	6%	8%	13%	7%	5%	1%	2%	8%	4%	1%	12%	5%	3%

Q19 (coded). In relation to your answer to the previous question, what was the main reason contributing to your satisfaction with the experience of playing football? (n=2,006)

# Reasons for negative satisfaction

The primary reasons for providing a negative satisfaction rating of the playing experience where that the club was poorly run, and the poor quality of coaches/managers in general.

Reasons for negative satisfaction rating – all lapsed players



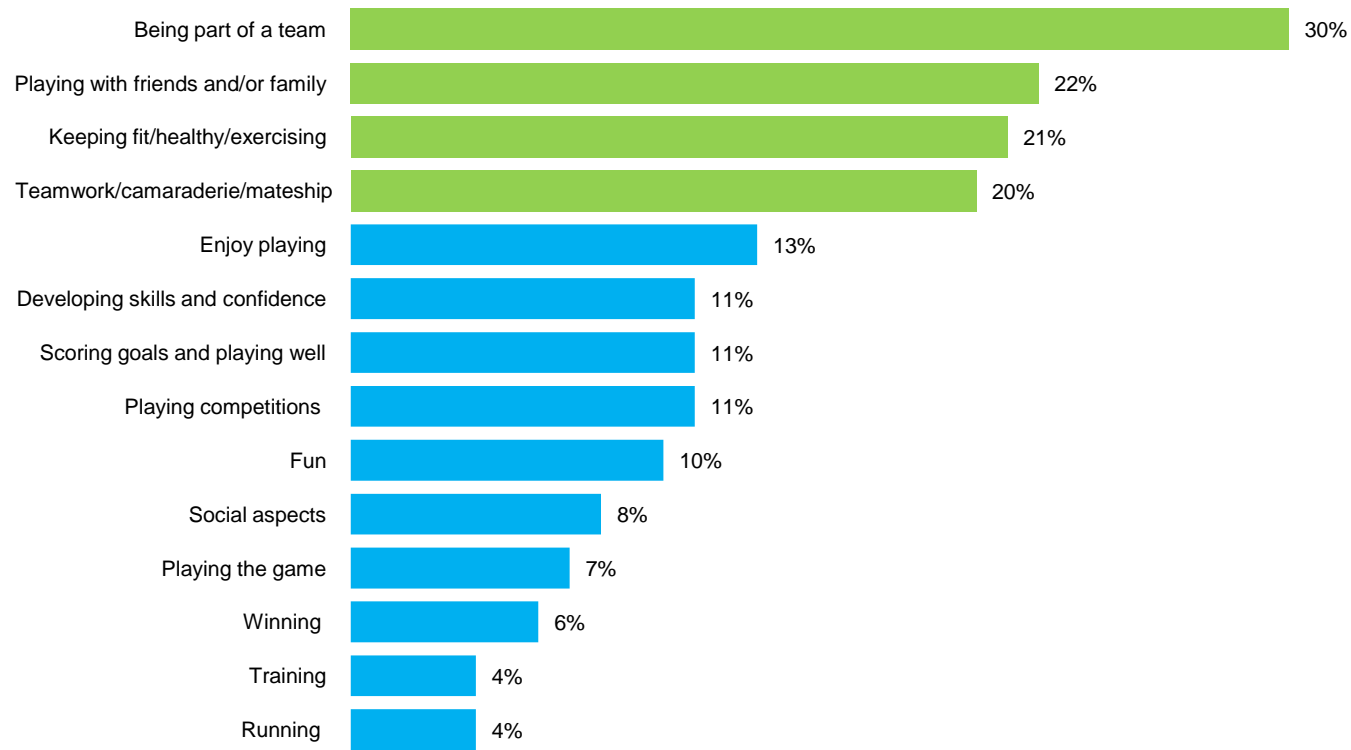
Reasons for a negative satisfaction rating	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Poorly organised/administered club/ association	11%	12%	8%	13%	13%	9%	10%	10%	14%	10%	12%	9%	9%	4%
Poor quality of coaches/managers	6%	7%	4%	8%	9%	6%	3%	1%	9%	6%	2%	6%	4%	2%
Lack of enjoyment	5%	6%	3%	7%	7%	4%	3%	3%	7%	4%	3%	4%	3%	2%
Cost of playing	4%	5%	2%	4%	2%	2%	8%	8%	4%	4%	9%	2%	2%	3%
Coach/manager too competitive/serious	4%	5%	4%	4%	8%	4%	2%	1%	7%	5%	1%	4%	3%	3%
Coach/manager unfair	4%	5%	3%	3%	8%	5%	1%	0%	7%	5%	1%	4%	3%	1%
Playing in wrong /grade (individuals and teams)	4%	4%	4%	2%	7%	4%	2%	5%	5%	4%	3%	3%	5%	4%
Managers/Coaches are unskilled or unqualified	4%	4%	3%	4%	6%	3%	3%	0%	5%	3%	2%	4%	3%	1%



# Best parts of playing football

For most lapsed football participants the best parts about playing relate to the social connections developed with teammates, specifically these include being part of a team, playing with friends or family, and the camaraderie or mateship developed with teammates. Also particularly important is the ability to keep fit and healthy.

**Best parts of playing football – all lapsed players**



# Best parts of playing football - detail

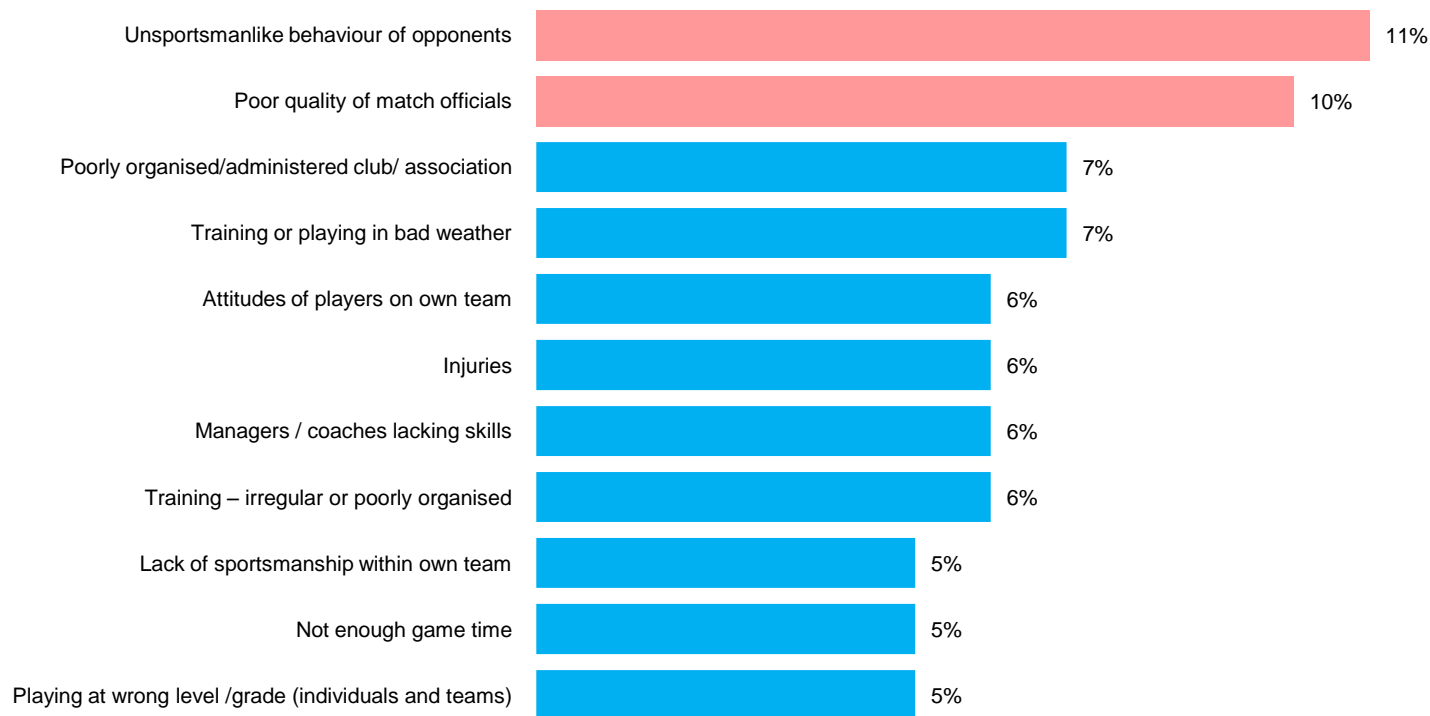
The fitness and health related benefits of participating in football are much more important to females, and in particular females over the age of 14 years of age. For younger participants aged between 5-9 years of age, the opportunity to play with friends or family is rated by most as the best part about playing football.

Best parts about playing football	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Being part of a team	30%	29%	32%	18%	32%	34%	30%	34%	27%	32%	30%	24%	34%	42%
Playing with friends and/or family	22%	22%	20%	32%	26%	23%	12%	6%	29%	22%	9%	28%	18%	9%
Keeping fit/healthy/exercising	21%	18%	30%	5%	13%	28%	37%	34%	8%	25%	33%	13%	36%	49%
Teamwork/camaraderie/mateship	20%	19%	21%	11%	15%	21%	24%	35%	13%	20%	33%	18%	23%	24%
Enjoy playing	13%	13%	13%	5%	11%	17%	20%	16%	8%	19%	18%	8%	20%	11%
Developing skills and confidence	11%	11%	12%	9%	13%	16%	9%	8%	11%	15%	7%	11%	12%	15%
Scoring goals and playing well	11%	12%	9%	15%	12%	12%	7%	8%	14%	12%	8%	10%	9%	7%
Playing competitions	11%	12%	8%	6%	8%	11%	18%	17%	8%	14%	19%	3%	10%	14%
Fun	10%	9%	14%	9%	11%	11%	10%	6%	10%	10%	4%	12%	15%	15%
Social aspects	8%	7%	11%	5%	3%	8%	16%	15%	3%	7%	16%	5%	13%	18%
Playing the game	7%	6%	8%	7%	8%	7%	6%	5%	7%	6%	6%	10%	8%	3%
Winning	6%	7%	4%	5%	6%	7%	8%	5%	6%	9%	7%	4%	3%	5%
Training	4%	4%	4%	6%	5%	4%	4%	2%	6%	3%	3%	4%	6%	2%
Running	4%	3%	5%	10%	5%	1%	1%	1%	6%	1%	1%	10%	1%	3%

# Worst parts about playing football

The worst parts about playing football are varied, however the more common aspects relate to the unsportsmanlike behaviour of opponents (particular prominent amongst players 35+ years of age) and the poor quality of match officials (more prominent amongst player 20+ years of age).

**Worst parts about playing football – all lapsed players**





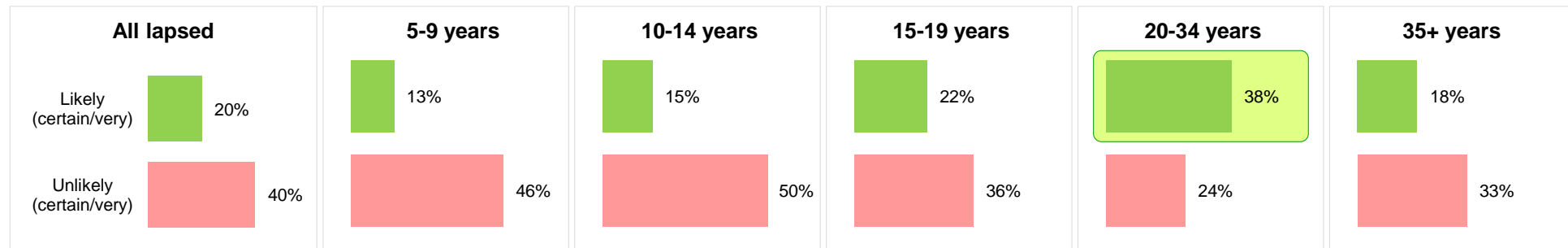
# Worst parts about playing football - detail

Whilst the worst parts about playing football are varied, participants over the age of 20 are more likely to mention the poor behaviour of opposition teams, poor quality of match officials and injuries.

Worst parts about playing football	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Unsportsmanlike behaviour of opponents	11%	11%	11%	7%	6%	12%	14%	23%	6%	12%	22%	9%	11%	13%
Poor quality of match officials	10%	9%	10%	0%	1%	11%	22%	22%	1%	14%	23%	2%	14%	18%
Poorly organised/administered club/ association	7%	8%	6%	5%	6%	8%	11%	8%	6%	10%	10%	3%	8%	8%
Training or playing in bad weather	7%	6%	10%	11%	8%	5%	4%	5%	8%	3%	3%	13%	7%	10%
Attitudes of players on own team	6%	6%	7%	5%	8%	8%	5%	3%	7%	7%	2%	5%	8%	8%
Injuries	6%	6%	7%	0%	1%	6%	16%	12%	1%	8%	14%	2%	7%	15%
Managers / coaches lacking skills	6%	6%	5%	8%	8%	5%	4%	2%	8%	4%	3%	7%	4%	4%
Training – irregular or poorly organised	6%	5%	7%	6%	9%	4%	4%	2%	7%	3%	2%	8%	5%	7%
Lack of sportsmanship within own team	5%	5%	7%	8%	7%	5%	2%	2%	7%	5%	1%	11%	5%	1%
Not enough game time	5%	6%	3%	9%	8%	4%	2%	0%	9%	4%	1%	5%	4%	0%
Playing at wrong level /grade (individuals and teams)	5%	5%	4%	3%	8%	4%	3%	3%	6%	4%	3%	5%	4%	4%

# Likelihood of playing again - next 12 months

Lapsed players under 14 are much more unlikely to play football again within the next 12 months compared to older segments – approximately half are certain not to or very unlikely to. The 20-34 year age segment are the most likely to resume playing.



Playing likelihood in next 12 months	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Certain to	11%	11%	10%	8%	7%	12%	20%	8%	8%	15%	12%	4%	15%	12%
Very likely to	10%	10%	11%	6%	8%	10%	18%	10%	7%	10%	14%	6%	13%	16%
Fairly likely	14%	14%	14%	10%	11%	15%	17%	18%	10%	19%	18%	15%	12%	16%
Fairly unlikely	17%	17%	18%	19%	16%	18%	13%	21%	16%	17%	18%	20%	16%	16%
Very unlikely	21%	21%	21%	27%	25%	19%	9%	19%	26%	14%	15%	27%	18%	16%
Certain not to	19%	19%	17%	19%	25%	17%	15%	14%	23%	17%	14%	21%	17%	13%
Don't know	9%	9%	9%	11%	8%	10%	7%	10%	10%	9%	9%	8%	9%	10%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Total likely	35%	34%	35%	24%	26%	37%	56%	36%	25%	44%	45%	25%	40%	45%
Total certain to/very likely	21%	20%	21%	13%	15%	22%	38%	18%	16%	25%	27%	10%	28%	29%
Total unlikely	57%	57%	56%	66%	65%	53%	37%	54%	65%	48%	47%	67%	51%	46%
Total certain not to/very unlikely	40%	40%	38%	46%	50%	36%	24%	33%	49%	31%	29%	47%	35%	29%

Note: Please see appendix A for further detail relating to the likelihood of playing football again in the next 2-3 years; 4-5 years; and 6-10 years.

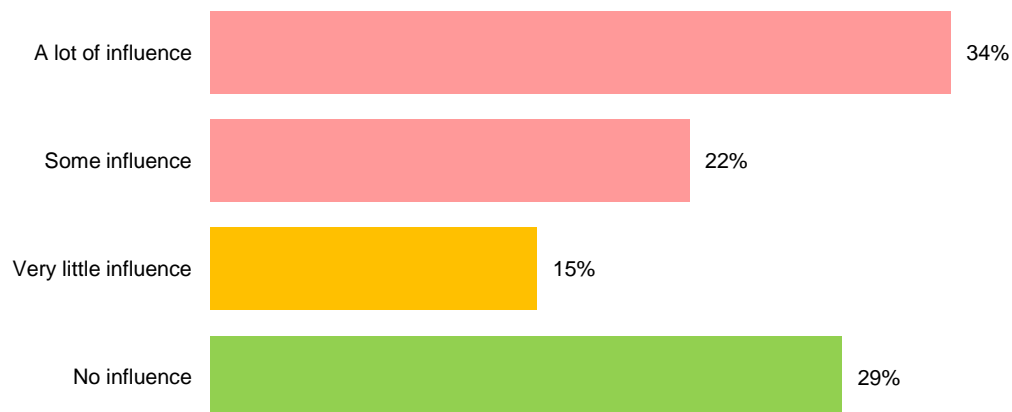
# **Reasons for stopping**



# Influence of experience on stopping

A third of all lapsed participants say that the experience of their last season in football had a lot of influence on their decision to stop playing. This figure is highest amongst children aged 10-14 years where nearly half say that their experience had a lot of influence on their decision – suggesting that those with a relatively short tenure in the game are more susceptible to negative experiences.

**Influence of last experience on decision to stop – all lapsed players**



One third of all lapsed participants say that the experience of their last season in football had a lot of influence on their decision to stop playing.

Influence of experience last season on stopping	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
A lot of influence	34%	35%	31%	32%	43%	31%	28%	32%	39%	30%	31%	36%	33%	22%
Some influence	22%	21%	25%	26%	21%	19%	25%	20%	23%	19%	21%	26%	21%	29%
Very little influence	15%	14%	17%	17%	14%	16%	12%	15%	14%	14%	14%	19%	17%	13%
No influence	29%	29%	27%	26%	21%	33%	36%	34%	24%	36%	34%	20%	30%	36%

# Point in time deciding to stop

Over half of all lapsed participants made the decision to stop playing during the middle or at the end of the last season of football that they played. This suggests that their experience in this last season of football has a significant influence on their likelihood of continuing to play. Children aged 5-9 years of age are the most likely to have decided not to play right at the beginning of the current season.

Point in time deciding to stop – all lapsed players

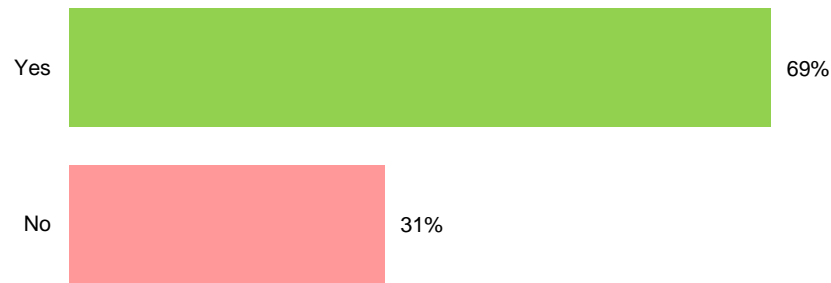


Point in time deciding to stop	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
During the middle of the last season that I played	30%	32%	26%	29%	33%	27%	33%	29%	33%	27%	33%	23%	28%	29%
Right at the end of the last season that I played	26%	26%	27%	23%	29%	28%	22%	27%	26%	26%	26%	28%	29%	21%
During the middle of the off-season	16%	16%	16%	15%	16%	14%	17%	18%	14%	17%	16%	18%	12%	20%
Right at the beginning of this current season	28%	27%	31%	33%	23%	31%	29%	25%	27%	30%	25%	31%	31%	31%

# Advised club about decision to stop

Seven out of ten lapsed players did advise their club that they had decided to stop playing football. Children between the ages of 5-9 years were less likely to advise the club, which may suggest that parents do not feel obliged to tell the club given that they may not have had intentions to be a long term player (and it was time to try another sport).

Advised club about decision to stop – all lapsed players

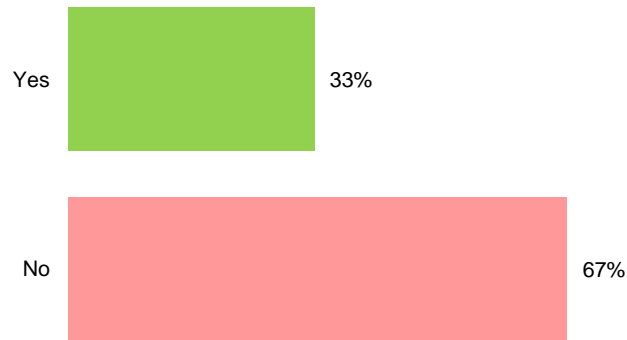


Advised the club about decision to stop playing	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Yes	69%	68%	73%	57%	66%	71%	79%	82%	62%	69%	80%	62%	76%	86%
No	31%	32%	27%	43%	34%	29%	21%	18%	38%	31%	20%	38%	24%	14%

# Club attempt to retain player

Two thirds of football clubs made no attempt to contact lapsed players in an effort to retain them. A significant concern for football is that approximately 80% of children aged 5-14 years were allowed to leave the game without a strategy or effort to retain them.

Club attempt to retain player – all lapsed players



80% of children 5-14 years of age were allowed to leave the game without any attempt made by their club to retain them.

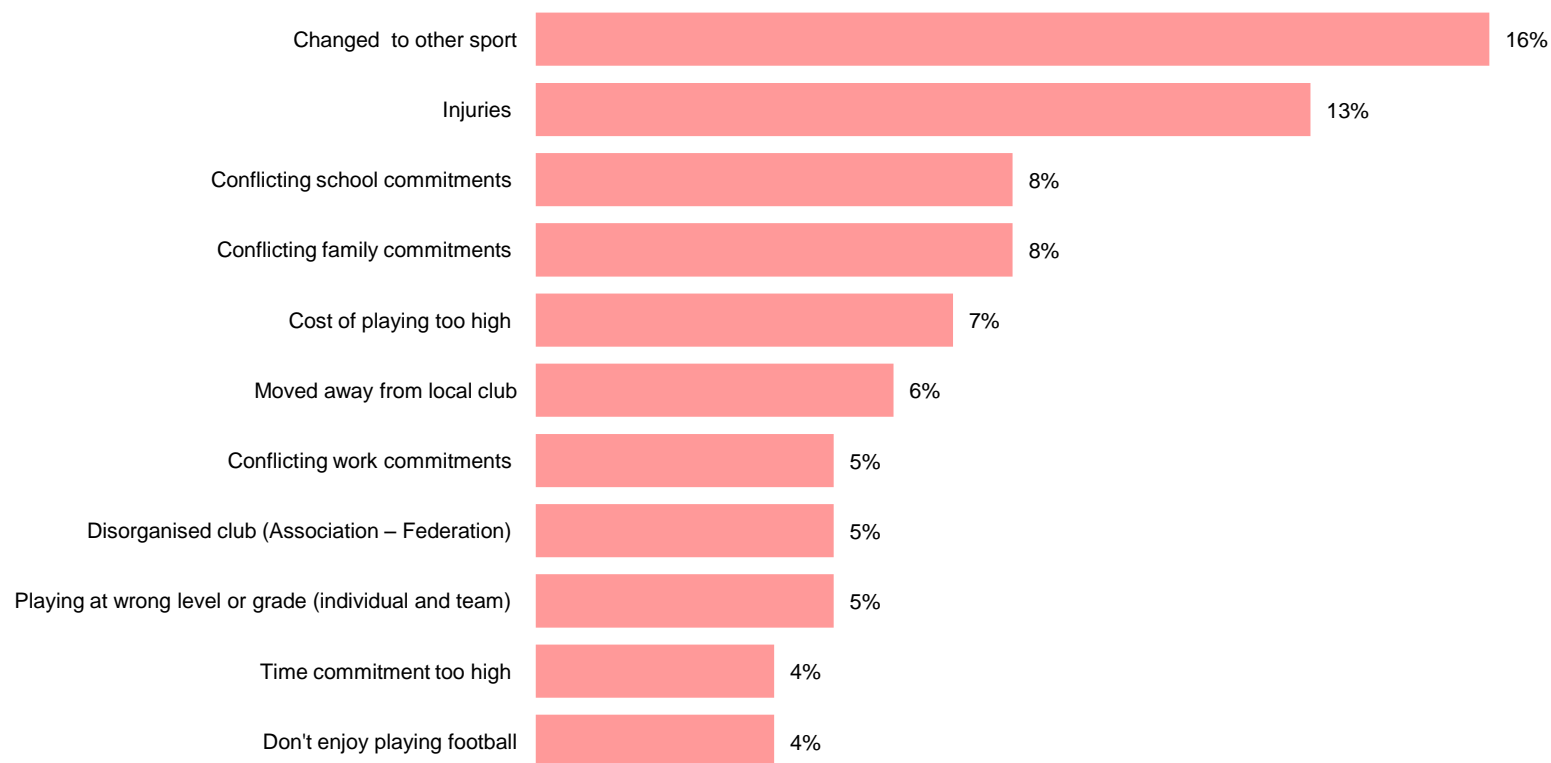
Club attempt to retain player	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Yes	33%	33%	35%	18%	22%	37%	47%	58%	20%	39%	52%	20%	42%	49%
No	67%	68%	65%	82%	78%	64%	53%	43%	80%	61%	48%	80%	59%	51%



# Main reason for stopping

The most prominent main reason players decided to stop playing football was many had changed to another sport, injuries, and various aspects relating to a lack of time due to school, family or work commitments.

**Main reason for stopping – all lapsed players**



# Main reason for stopping - detail

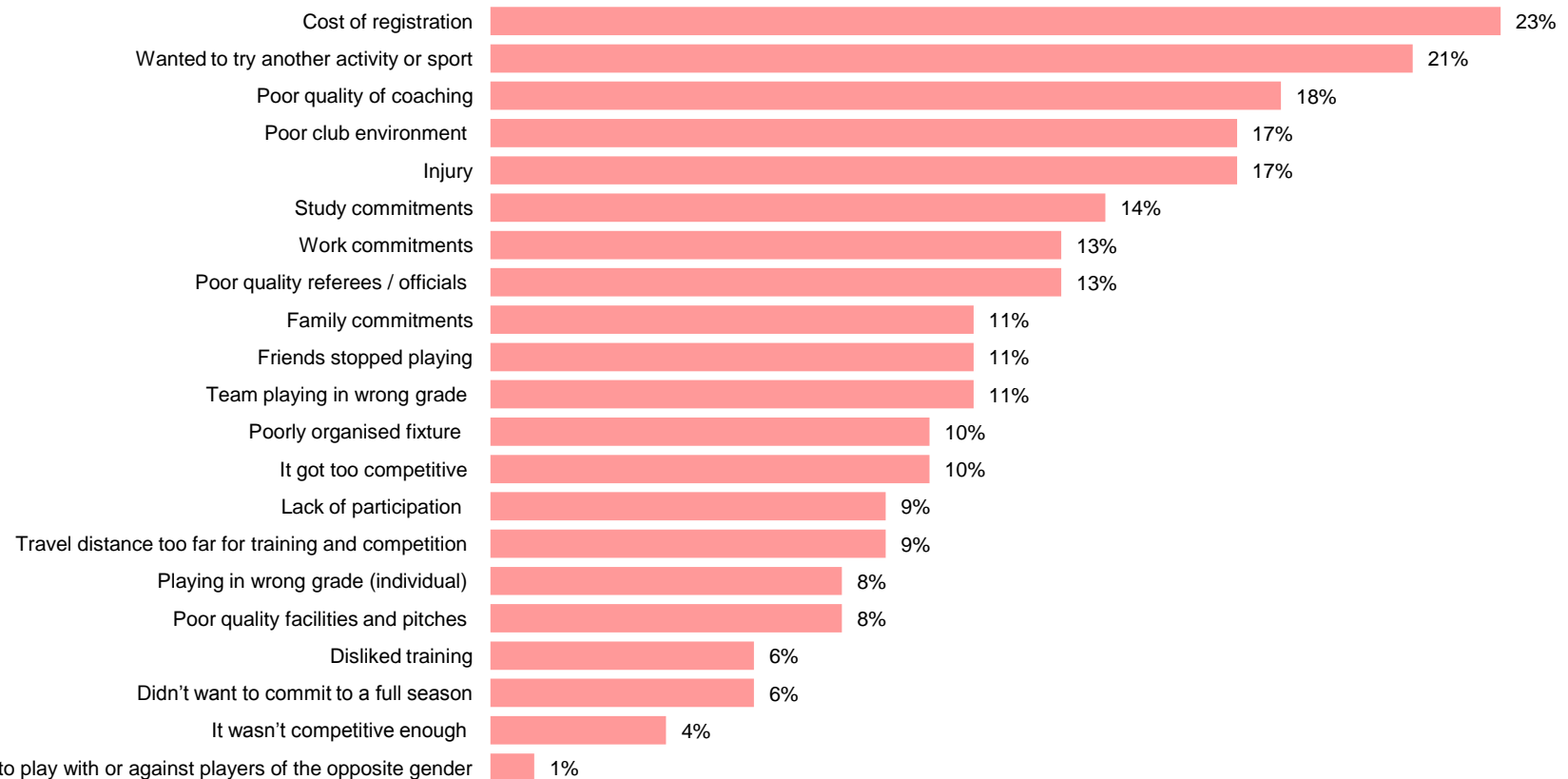
Amongst children 14 years of age or under, the main reason for stopping was to play another sport. From the age of 15-19 conflicting school commitments becomes the main reason players stop. For players over the age of 20 the main reason for stopping is injuries, however a range of other issues also become more prominent - such as conflicting work and family commitments.

Main reason for stopping	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Changed to other sport	16%	18%	11%	34%	23%	10%	2%	2%	29%	10%	3%	24%	4%	2%
Injuries	13%	13%	13%	2%	5%	9%	27%	35%	3%	12%	34%	5%	14%	25%
Conflicting school commitments	8%	7%	11%	1%	6%	27%	5%	1%	4%	19%	2%	2%	28%	2%
Conflicting family commitments	8%	7%	11%	7%	5%	4%	13%	14%	5%	4%	14%	10%	6%	20%
Cost of playing too high	7%	8%	6%	6%	4%	4%	15%	11%	6%	8%	12%	3%	6%	11%
Moved away from local club	6%	6%	7%	6%	2%	6%	14%	4%	3%	8%	8%	4%	7%	11%
Conflicting work commitments	5%	5%	5%	1%	1%	8%	12%	7%	1%	10%	9%	1%	10%	4%
Disorganised club (Association – Federation)	5%	5%	4%	4%	6%	5%	5%	4%	6%	4%	5%	3%	7%	2%
Playing at wrong level or grade (individual and team)	5%	4%	5%	5%	7%	6%	1%	2%	6%	4%	1%	7%	4%	4%
Time commitment too high	4%	4%	6%	3%	3%	6%	7%	4%	2%	7%	5%	4%	7%	7%
Don't enjoy playing football	4%	4%	2%	8%	4%	2%	1%	1%	6%	2%	1%	4%	1%	1%

# Other reasons for stopping

Overall the cost of registration is the most prominent secondary reason for stopping, followed by wanting to try another sport, the poor quality of coaching, poor quality club environment and injuries.

**Other reasons for stopping – all lapsed players**



Q28. Which of the following reasons had an influence on your decision to stop playing football? (Please select all that apply – including if you have mentioned the reason in the previous question).

(n=2,006)

# Other reasons for stopping - detail

Further analysis reveals that the cost of registration has a significant influence on players over the age of 20 years, whilst younger participants 5-9 years wanted to try another sport. Between the ages of 10-14 years issues of poor quality coaching and club environment become more prominent.

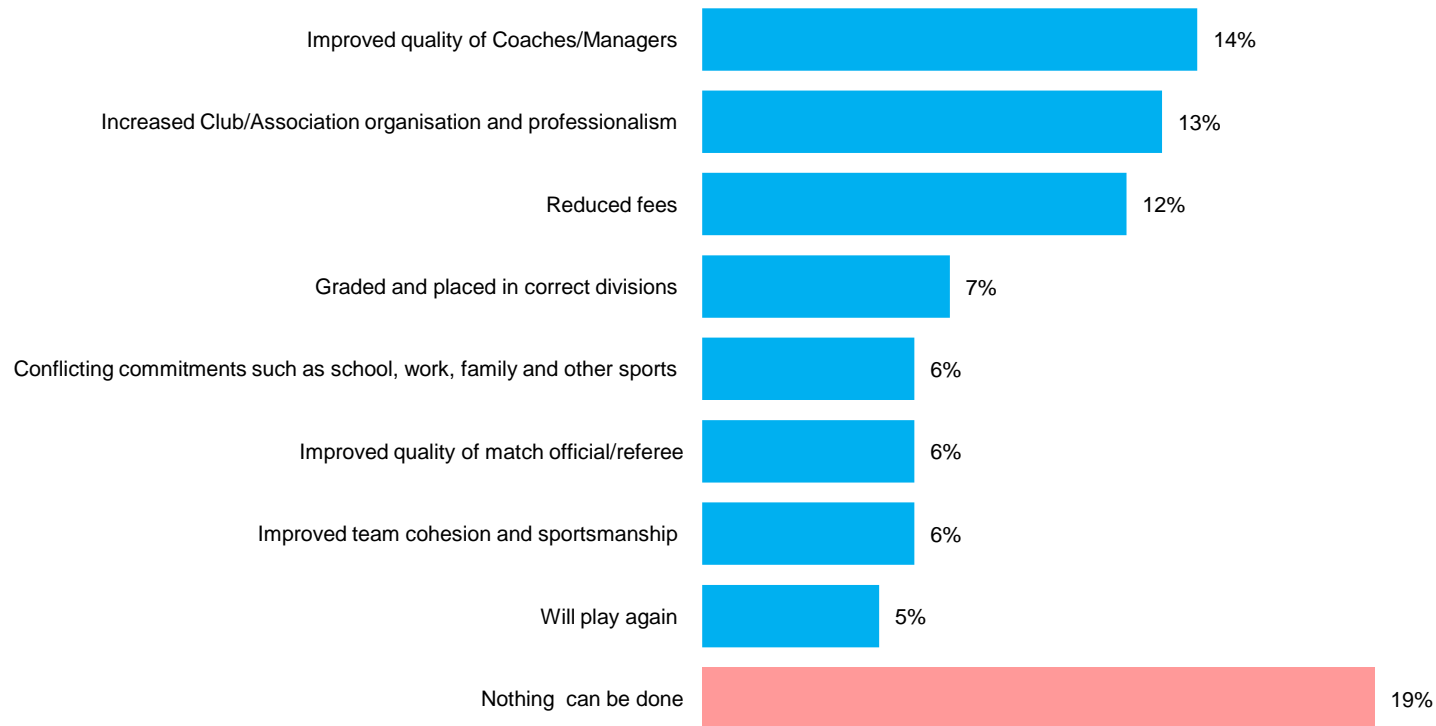
Other reasons for stopping	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Cost of registration	23%	23%	23%	22%	14%	16%	38%	34%	17%	22%	36%	17%	22%	36%
Wanted to try another activity or sport	21%	23%	18%	44%	30%	12%	6%	3%	36%	11%	5%	34%	8%	7%
Poor quality of coaching	18%	19%	17%	17%	27%	20%	14%	6%	23%	21%	8%	23%	17%	8%
Poor club environment	17%	17%	18%	14%	23%	17%	17%	11%	21%	17%	10%	14%	20%	19%
Injury	17%	17%	16%	2%	6%	13%	33%	46%	4%	17%	43%	5%	16%	36%
Study commitments	14%	12%	20%	1%	7%	44%	15%	2%	5%	38%	4%	3%	46%	6%
Work commitments	13%	12%	15%	5%	1%	22%	26%	19%	3%	21%	23%	3%	26%	19%
Poor quality referees / officials	13%	13%	12%	4%	6%	13%	26%	24%	5%	14%	29%	5%	15%	18%
Family commitments	11%	11%	13%	10%	6%	6%	17%	27%	7%	6%	23%	9%	7%	29%
Friends stopped playing	11%	11%	12%	9%	12%	17%	6%	9%	10%	15%	7%	12%	14%	9%
Team playing in wrong grade	11%	11%	11%	6%	17%	12%	8%	9%	12%	12%	8%	11%	10%	11%
Poorly organised fixture	10%	10%	12%	12%	10%	9%	10%	10%	11%	6%	11%	11%	14%	10%
It got too competitive	10%	11%	9%	11%	15%	10%	3%	8%	15%	7%	5%	9%	10%	8%
Lack of participation	9%	9%	10%	15%	9%	9%	7%	6%	11%	8%	5%	12%	11%	7%
Travel distance too far for training and competition	9%	8%	12%	7%	8%	9%	12%	8%	6%	9%	10%	14%	12%	7%
Playing in wrong grade (individual)	8%	9%	5%	5%	13%	7%	5%	4%	10%	9%	5%	7%	5%	1%
Poor quality facilities and pitches	8%	8%	6%	4%	4%	8%	14%	12%	4%	11%	15%	3%	8%	7%
Disliked training	6%	6%	6%	6%	9%	4%	5%	2%	8%	5%	2%	7%	6%	6%
Didn't want to commit to a full season	6%	5%	7%	4%	2%	5%	10%	11%	2%	7%	10%	4%	5%	13%
It wasn't competitive enough	4%	3%	5%	2%	4%	4%	6%	2%	3%	3%	4%	4%	5%	6%
Don't want to play with/against opposite gender	1%	0%	3%	2%	2%	0%	0%	1%	0%	0%	1%	8%	1%	0%
None of the above	12%	11%	13%	15%	13%	9%	10%	8%	14%	8%	8%	11%	10%	19%



# Changes required to reconsider

Suggestions on changes or improvements that would make players significantly more likely to play again where many and varied, however the most common theme was related to improving the quality of Coaches/Managers, followed by the need for Club/Association to be more organised or professional, and a reduction in playing costs.

**Changes needed to start playing again – all lapsed players**



# Changes required to reconsider - detail

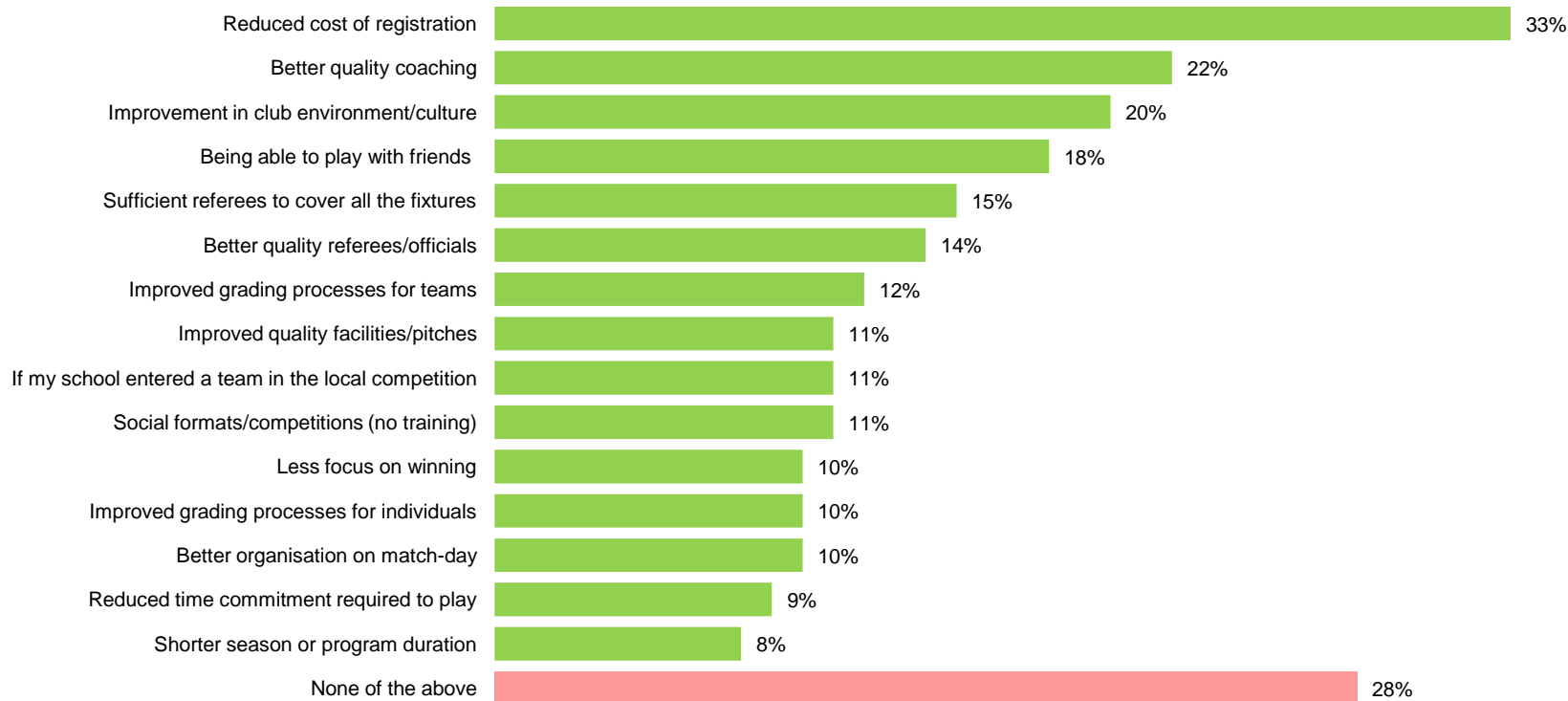
Amongst lapsed players 20 years of age or over, a reduction in playing costs and improvements in the quality of match officials were the most prominent suggestions to make them more likely to play again. Amongst younger lapsed participants the suggestions were more varied, however the need for improvements to the quality of Coaches/Managers is rated highest amongst 10-14 year olds.

Changes required to reconsider playing	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Nothing can be done	19%	20%	18%	23%	19%	21%	13%	19%	22%	17%	18%	18%	20%	14%
Improved quality of Coaches/Managers	14%	14%	13%	18%	20%	10%	10%	4%	19%	10%	5%	19%	10%	9%
Increased Club/Association organisation and professionalism	13%	14%	12%	11%	15%	13%	15%	11%	14%	14%	14%	12%	13%	12%
Reduced fees	12%	12%	11%	9%	7%	8%	24%	17%	8%	13%	20%	7%	9%	21%
Graded and placed in correct divisions	7%	7%	7%	4%	11%	7%	6%	5%	9%	6%	6%	6%	8%	5%
Conflicting commitments such as school, work, family and other sports	6%	6%	7%	6%	5%	8%	5%	6%	5%	9%	4%	7%	7%	7%
Improved quality of match official/referee	6%	6%	5%	1%	2%	4%	15%	13%	1%	6%	16%	2%	6%	9%
Improved team cohesion and sportsmanship	6%	6%	6%	8%	7%	6%	3%	3%	7%	5%	3%	8%	6%	5%
Will play again	5%	5%	4%	5%	3%	5%	8%	2%	4%	6%	5%	3%	4%	6%

# Other changes required to reconsider

When provided with a list of improvements that would make lapsed players significantly more likely to reconsider playing, a reduction in registration costs was the most prominent, followed by better quality coaching and improvements in the club environment/culture.

**Other changes to improve experience – all lapsed players**



# Other changes required to reconsider - detail

A reduction in player registration costs is likely to have a greater impact on players over 20 years of age being more likely to play again, followed by improvements to the quality and quantity of referees. Amongst children 10-14 years of age, improvements to the quality of coaching would have the largest impact on players being more likely to reconsider.

Other changes required to reconsider	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Reduced cost of registration	33%	32%	36%	27%	23%	28%	55%	44%	24%	34%	48%	28%	40%	45%
Better quality coaching	22%	23%	20%	21%	30%	26%	18%	6%	27%	27%	10%	24%	21%	12%
Improvement in club environment/culture	20%	20%	21%	17%	25%	21%	24%	11%	21%	24%	15%	20%	23%	20%
Being able to play with friends	18%	17%	21%	22%	20%	20%	15%	9%	19%	19%	10%	28%	20%	13%
Sufficient referees to cover all the fixtures	15%	15%	16%	2%	8%	17%	30%	28%	5%	20%	30%	5%	21%	24%
Better quality referees/officials	14%	14%	12%	3%	7%	14%	29%	22%	5%	18%	30%	6%	14%	20%
Improved grading processes for teams	12%	12%	12%	6%	17%	14%	11%	10%	12%	16%	10%	12%	11%	11%
Improved quality facilities/pitches	11%	12%	10%	4%	6%	13%	21%	19%	5%	18%	22%	7%	12%	10%
If my school entered a team in the local competition	11%	11%	11%	19%	17%	9%	0%	0%	18%	6%	0%	20%	8%	0%
Social formats/competitions (no training)	11%	9%	14%	9%	8%	13%	14%	12%	8%	10%	12%	10%	14%	21%
Less focus on winning	10%	10%	10%	14%	14%	8%	5%	8%	15%	6%	5%	11%	9%	10%
Improved grading processes for individuals	10%	10%	9%	5%	15%	11%	9%	4%	11%	12%	5%	9%	9%	7%
Better organisation on match-day	10%	10%	9%	12%	9%	7%	11%	7%	10%	8%	11%	11%	8%	6%
Reduced time commitment required to play	9%	8%	13%	6%	6%	10%	13%	12%	6%	9%	9%	6%	14%	22%
Shorter season or program duration	8%	7%	10%	12%	8%	7%	5%	5%	9%	4%	5%	10%	10%	9%
None of the above	28%	28%	26%	30%	28%	29%	20%	31%	29%	28%	26%	29%	23%	28%

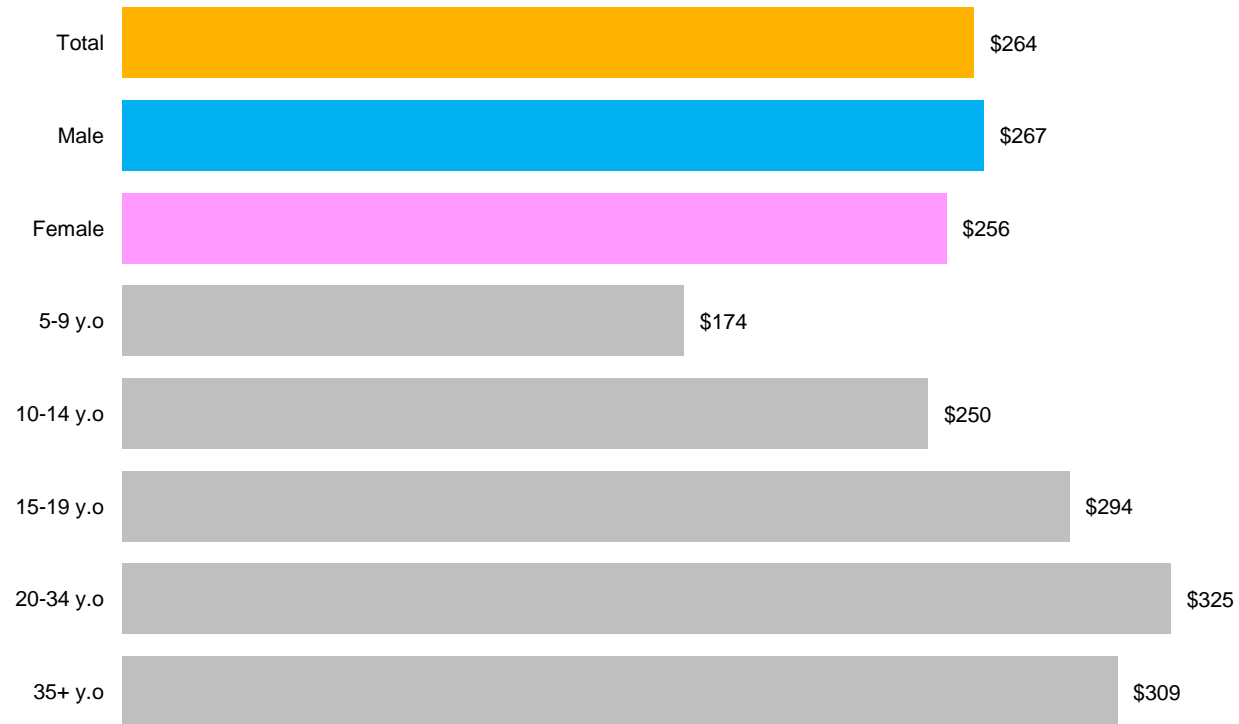


# Registration

# Cost of playing football

The mean cost of playing football for all lapsed participants was \$264 to cover all club fees and registration costs. The mean cost of playing for players 5-9 years of age is \$174 and increases with age.

**Mean cost of playing (club fees and registration)**



# Cost of playing football - detail

	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Less than \$49	2%	2%	1%	2%	1%	2%	3%	1%	1%	3%	2%	3%	1%	0%
\$50 - \$99	6%	6%	7%	16%	6%	5%	1%	1%	9%	4%	1%	13%	5%	1%
\$100 - \$149	18%	17%	19%	34%	24%	16%	5%	2%	27%	13%	2%	33%	14%	5%
\$150 - \$199	16%	16%	16%	18%	24%	18%	7%	6%	22%	17%	4%	22%	17%	7%
\$200 - \$249	12%	12%	14%	11%	12%	13%	10%	16%	12%	11%	12%	10%	16%	16%
\$250 - \$299	13%	14%	11%	10%	10%	12%	15%	24%	11%	12%	22%	5%	8%	24%
\$300 - \$349	11%	12%	11%	4%	7%	9%	21%	23%	6%	12%	22%	3%	11%	23%
\$350 - \$399	9%	9%	8%	2%	6%	6%	18%	15%	5%	10%	17%	4%	9%	13%
\$400 - \$449	4%	4%	5%	1%	3%	5%	8%	4%	2%	6%	7%	3%	8%	2%
\$450 - \$499	4%	4%	4%	2%	4%	4%	7%	6%	3%	5%	7%	2%	4%	6%
\$500 - \$549	1%	2%	1%	0%	2%	2%	2%	1%	1%	2%	2%	1%	2%	0%
\$550 - \$599	1%	1%	1%	1%	1%	2%	2%	2%	1%	2%	2%	1%	1%	1%
\$600 - \$699	1%	1%	1%	0%	1%	2%	1%	0%	0%	2%	0%	1%	2%	2%
\$700 - \$799	0%	1%	0%	0%	0%	2%	0%	1%	0%	2%	1%	0%	1%	1%
\$800 - \$899	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%
\$900 - \$999	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
\$1,000 - \$1,499	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	0%	1%	0%	0%
\$1,500 - \$1,999	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
\$2,000 - \$2,499	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
\$2,500 or more	0%	0%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	1%	0%
Mean	\$264	\$267	\$256	\$174	\$250	\$294	\$325	\$309	\$226	\$303	\$323	\$189	\$296	\$303

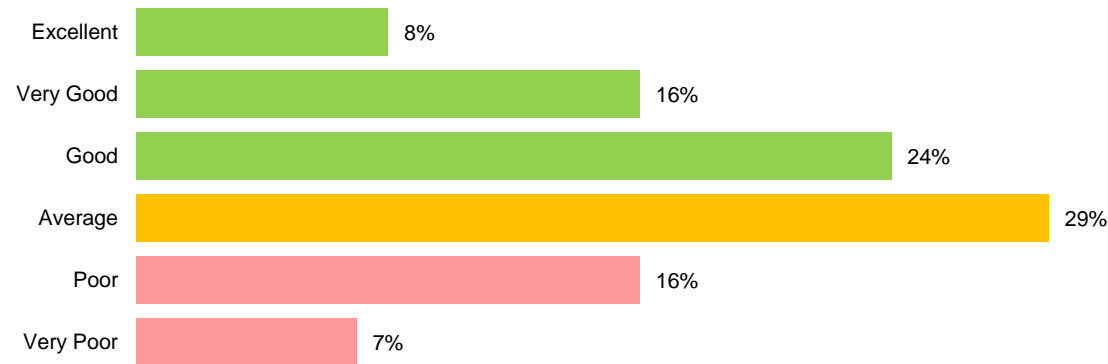
Q31. Approximately how much did you pay to play your most recent season of football? (All club fees and registration) (n=2,006)

2012 FFA Lapsed Participant Survey • September 2012 • Commercial-in-Confidence

# Value for money compared to other sports

The value for money of playing football in comparison with other sports is seen as 'average'. Just one quarter of players view the value for money as excellent or very good. This is a significant concern for football as the value proposition of participating does not equate to value for money.

Value for money – all lapsed players



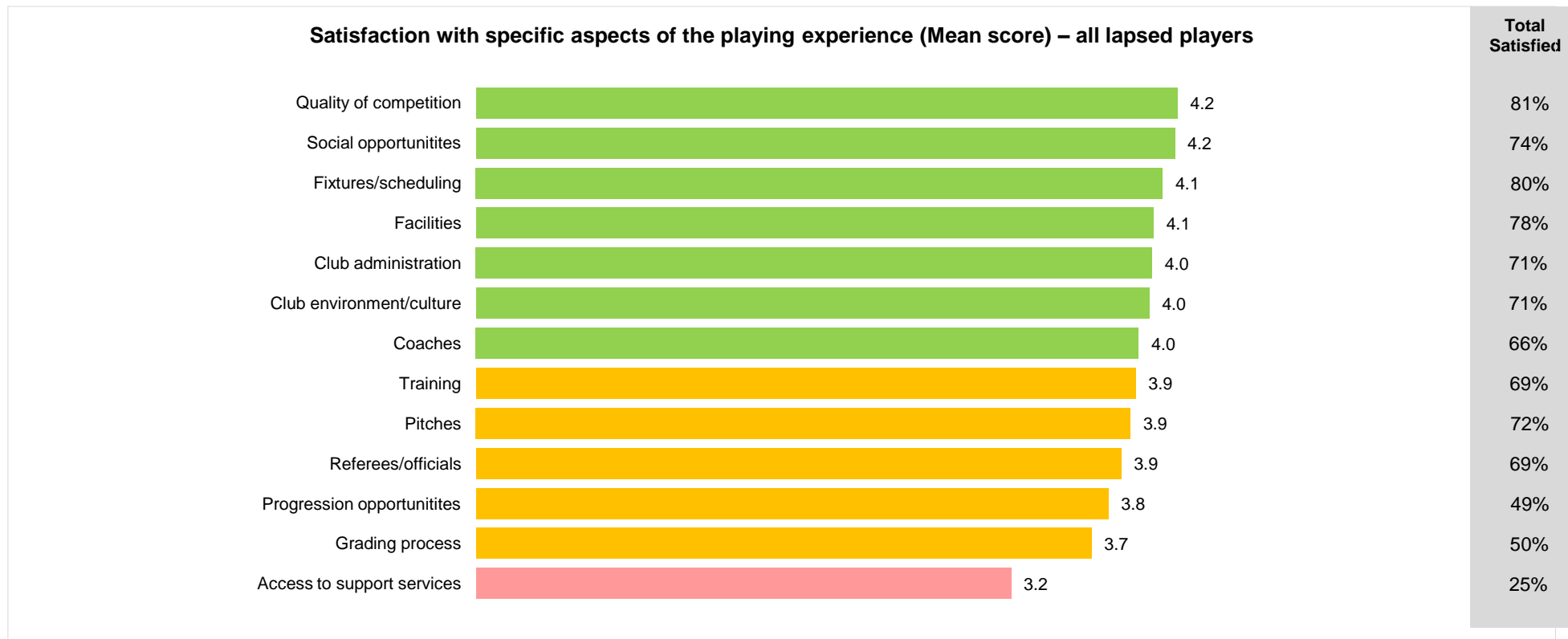
	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Excellent	8%	8%	7%	9%	6%	12%	6%	7%	7%	12%	7%	7%	8%	6%
Very Good	16%	16%	17%	18%	17%	19%	12%	12%	17%	18%	11%	20%	17%	14%
Good	24%	22%	28%	19%	25%	29%	23%	21%	21%	26%	21%	26%	30%	26%
Average	29%	29%	28%	29%	27%	24%	32%	36%	28%	24%	35%	28%	28%	30%
Poor	16%	17%	14%	17%	17%	11%	19%	17%	18%	14%	18%	14%	11%	16%
Very Poor	7%	8%	6%	8%	7%	5%	9%	8%	8%	6%	8%	4%	7%	8%



# Satisfaction

# Satisfaction with specific aspects

Overall, lapsed players are reasonably satisfied with most aspects relating to the playing experience, however the grading process and opportunities to progress within the sport have the lowest levels of satisfaction (behind access to support services, such as doctors and physiotherapists – which is not surprising as many clubs would not provide this level of support).



\* Note, the responses to this question were on a scale from 6 to 0, where 6 = extremely satisfied; 5 = very satisfied; 4 = fairly satisfied; 3 = fairly dissatisfied; 2 = very dissatisfied; 1 = extremely dissatisfied; and 0 = don't know. The responses shown in the table are the mean score.

# Satisfaction with specific aspects - detail

Further analysis shows that satisfaction levels with various aspects of the playing experience are fairly consistent across the various customer segments. Lapsed players 20 years of age or over are less satisfied with the quality of pitches and referees, and are more satisfied with the club culture and social opportunities of playing.

Satisfaction with specific aspects of the playing experience	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Quality of competition	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.3	4.2	4.3	4.2	4.2	4.1	4.4
Social opportunities	4.2	4.2	4.3	4.1	4.0	4.2	4.4	4.5	4.0	4.2	4.5	4.2	4.2	4.4
Fixtures/scheduling	4.1	4.1	4.0	4.1	4.1	4.1	4.2	4.1	4.1	4.3	4.1	4.0	4.0	4.1
Facilities	4.1	4.0	4.1	4.2	4.2	4.1	3.8	3.9	4.2	4.1	3.8	4.2	4.0	4.1
Club administration	4.0	4.0	4.2	4.0	3.9	4.1	4.1	4.3	3.9	4.1	4.3	4.1	4.1	4.3
Club environment/culture	4.0	4.0	4.1	3.9	3.8	4.1	4.2	4.4	3.8	4.1	4.4	4.1	4.1	4.2
Coaches	4.0	3.9	4.1	4.0	3.8	4.0	4.0	4.2	3.9	4.0	4.0	4.1	4.1	4.3
Training	3.9	3.9	4.0	3.9	3.8	4.0	4.0	4.2	3.8	4.0	4.1	4.0	4.0	4.2
Pitches	3.9	3.9	4.0	4.2	4.1	3.9	3.6	3.5	4.1	3.9	3.4	4.2	3.9	3.8
Referees/officials	3.9	3.8	3.9	4.2	4.1	3.9	3.4	3.4	4.1	3.8	3.3	4.2	3.9	3.6
Progression opportunities	3.8	3.8	3.8	3.9	3.6	3.7	3.8	4.2	3.7	3.7	4.1	3.9	3.7	4.0
Grading process	3.7	3.7	3.7	3.7	3.5	3.7	3.9	3.9	3.5	3.7	3.9	3.6	3.8	3.8
Access to support services	3.2	3.2	3.3	3.4	3.3	3.2	3.1	3.0	3.3	3.2	3.0	3.6	3.1	3.1

\* Note, the responses to this question were on a scale from 6 to 0, where 6 = extremely satisfied; 5 = very satisfied; 4 = fairly satisfied; 3 = fairly dissatisfied; 2 = very dissatisfied; 1 = extremely dissatisfied; and 0 = don't know. The responses shown in the table are the mean score.

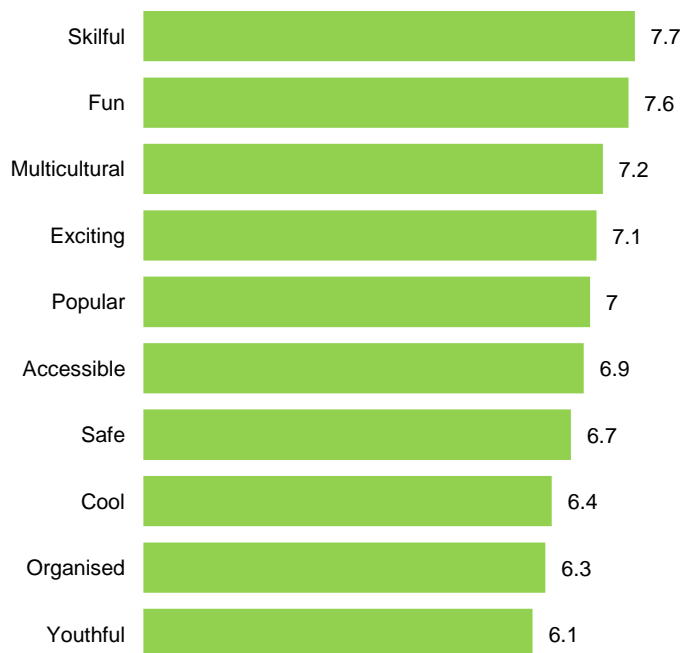
# **Brand associations**



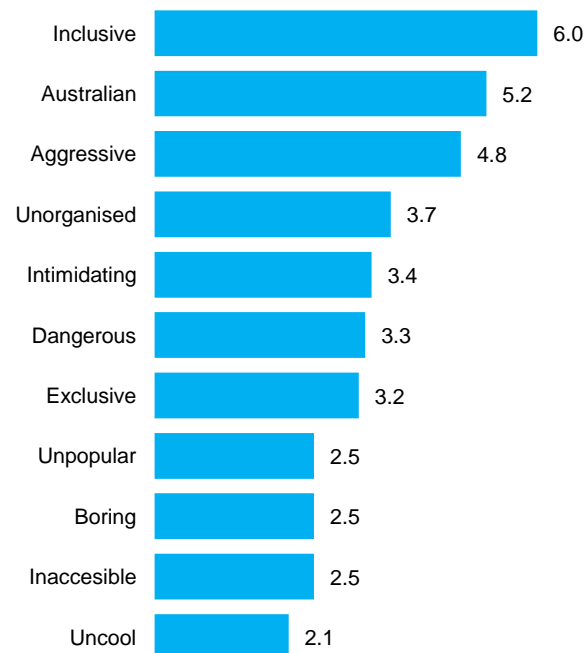
# Brand associations

The dominant brand associations with football are predominantly positive attributes such as skilful, fun, and multicultural. Negative words are associated to a lesser degree, however the most prominent negative perceptions are aggressive, unorganised and intimidating.

**Top 10 football word association – all lapsed players**



**Other football word association – all lapsed players**



\* Note, the responses to this question were on a scale from 0 to 10 with end-point labels only, where 0 = 'does not apply at all' and 10 = 'strongly applies'. The responses shown in the table are the mean score.

Q35. The following are some words or descriptions about football that other people have made. For each one listed could you please tell us the extent you believe it applies to football?  
(On a scale from 0-10, where 10 means strongly applies and 0 means does not apply at all)? (n=2,006)

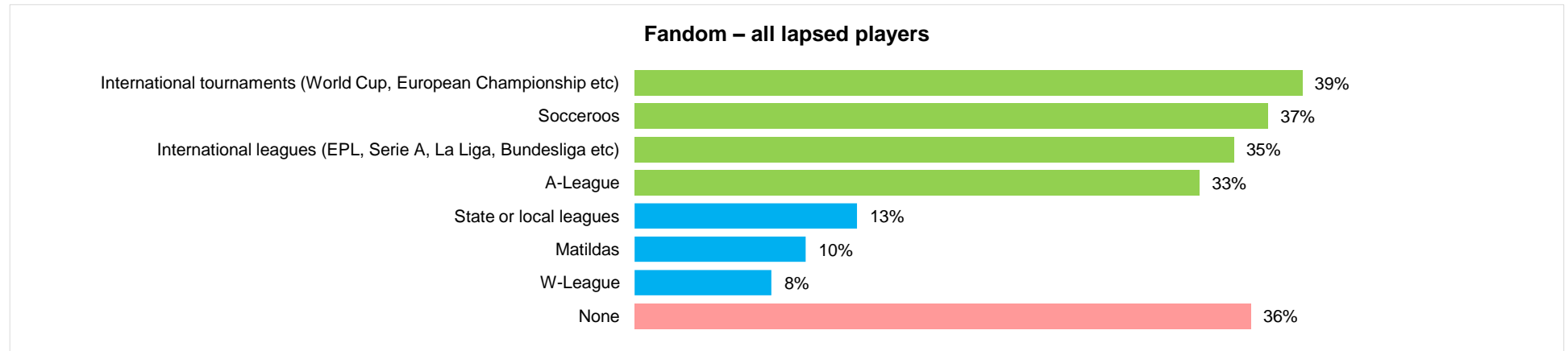
# Brand associations

Football brand associations	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Skilful	7.7	7.7	7.7	6.9	7.6	8.2	8.1	8.2	7.3	8.2	8.1	7.2	8.0	8.0
Fun	7.6	7.5	7.9	6.9	7.2	8.0	8.4	8.2	7.0	8.0	8.2	7.2	8.3	8.4
Multicultural	7.2	7.2	7.1	6.0	6.9	7.7	8.0	8.0	6.5	8.0	8.2	6.5	7.3	7.6
Exciting	7.1	7.1	7.3	6.2	6.7	7.7	7.9	7.7	6.5	7.8	7.7	6.5	7.7	7.9
Popular	7.0	7.0	7.1	6.3	6.7	7.4	7.3	7.6	6.6	7.4	7.5	6.6	7.2	7.5
Accessible	6.9	6.8	7.0	6.2	6.6	7.3	7.3	7.3	6.4	7.2	7.4	6.5	7.3	7.2
Safe	6.7	6.7	6.5	6.6	6.9	6.7	6.5	6.4	6.8	6.8	6.5	6.8	6.5	6.2
Cool	6.4	6.3	6.5	6.1	6.1	6.6	6.9	6.3	6.1	6.6	6.5	6.1	6.9	6.7
Organised	6.3	6.3	6.4	5.9	6.0	6.8	6.5	6.8	5.9	6.8	6.7	6.1	6.5	6.6
Youthful	6.1	6.0	6.1	5.5	6.2	6.7	6.2	5.5	5.9	6.6	5.8	5.9	6.7	5.8
Inclusive	6.0	6.0	6.1	5.5	5.7	6.3	6.6	6.7	5.5	6.4	6.7	5.8	6.2	6.4
Australian	5.2	5.1	5.3	5.0	5.0	5.6	5.1	5.2	5.0	5.2	5.2	5.2	5.8	4.9
Aggressive	4.8	4.8	5.1	3.8	4.4	5.4	5.7	5.6	4.1	5.4	5.6	4.2	5.6	5.7
Unorganised	3.7	3.7	3.5	3.4	3.8	3.4	3.9	3.6	3.8	3.7	3.6	3.2	3.7	3.7
Intimidating	3.4	3.3	3.5	3.4	3.4	3.4	3.4	3.2	3.4	3.3	3.2	3.5	3.6	3.4
Dangerous	3.3	3.3	3.4	2.7	2.9	3.5	4.0	3.7	2.8	3.7	3.8	2.9	3.7	3.9
Exclusive	3.2	3.2	3.3	3.0	3.4	3.6	3.2	2.8	3.3	3.5	2.8	3.0	3.6	3.5
Unpopular	2.5	2.5	2.2	2.4	2.6	2.5	2.4	2.3	2.5	2.7	2.4	2.4	2.2	2.0
Boring	2.5	2.6	2.3	3.4	2.8	2.1	1.9	1.9	3.1	2.2	1.9	3.1	1.9	1.4
Inaccessible	2.5	2.5	2.4	2.4	2.5	2.5	2.6	2.5	2.5	2.7	2.5	2.4	2.5	2.3
Uncool	2.1	2.2	1.8	2.2	2.3	2.0	2.0	1.9	2.3	2.2	2.0	1.9	1.7	1.7

Q35. The following are some words or descriptions about football that other people have made. For each one listed could you please tell us the extent you believe it applies to football?  
(On a scale from 0-10, where 10 means strongly applies and 0 means does not apply at all)? (n=2,006)

# **Football consumption**

Males are much more likely to actively follow a form of elite football, with approximately 40% following International Tournaments, International leagues and the Socceroos. Not surprisingly, Females in general are much less likely to follow a form of elite football.



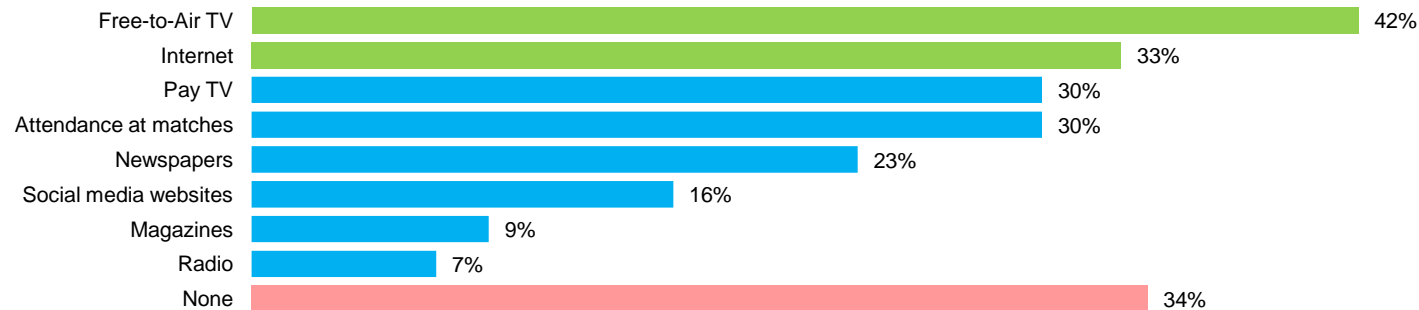
Football teams, leagues our tournaments actively followed or supported	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Int. tournaments (World Cup, Euro Champs etc)	39%	43%	27%	11%	31%	48%	60%	58%	25%	59%	67%	10%	33%	43%
Socceroos	37%	40%	29%	18%	32%	41%	50%	55%	28%	46%	60%	19%	36%	35%
International leagues (EPL, Serie A, La Liga etc)	35%	42%	17%	9%	23%	40%	63%	57%	19%	57%	75%	8%	21%	24%
A-League	33%	35%	28%	13%	24%	43%	45%	53%	21%	44%	55%	13%	35%	43%
State or local leagues	13%	12%	15%	4%	5%	17%	21%	26%	4%	15%	27%	7%	20%	20%
Matildas	10%	6%	23%	4%	6%	13%	15%	19%	3%	5%	13%	15%	29%	29%
W-League	8%	5%	16%	2%	2%	9%	13%	19%	1%	5%	11%	3%	19%	33%
None	36%	33%	44%	67%	43%	28%	13%	13%	51%	19%	7%	62%	38%	25%



# Media consumption

Football media is consumed primarily through free-to-air TV, and this is highest among adults 35 years and over. The younger age groups of 5-14 years consume significantly less football media than adults.

**Media consumption – all lapsed players**



Media channels used to follow football	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Free-to-Air TV	42%	44%	39%	22%	34%	46%	59%	64%	31%	52%	63%	20%	46%	59%
Internet	33%	36%	22%	6%	17%	39%	64%	56%	14%	52%	70%	7%	31%	33%
Pay TV	30%	33%	21%	14%	20%	35%	45%	48%	18%	43%	55%	16%	22%	28%
Attendance at matches	30%	30%	30%	11%	17%	36%	48%	52%	14%	41%	54%	18%	33%	44%
Newspapers	23%	25%	16%	3%	13%	24%	40%	47%	10%	30%	51%	4%	22%	28%
Social media websites	16%	16%	14%	2%	7%	26%	34%	17%	5%	32%	25%	3%	20%	23%
Magazines	9%	9%	6%	2%	6%	12%	15%	11%	5%	14%	15%	3%	9%	6%
Radio	7%	8%	6%	1%	3%	9%	13%	17%	2%	10%	16%	1%	10%	11%
None	34%	32%	40%	64%	45%	25%	11%	9%	51%	17%	5%	59%	34%	19%

# **Respondent profile**

# Respondent profile

Cultural background	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
I am Australian born, and so are my parents	62%	60%	67%	74%	70%	65%	50%	39%	70%	61%	37%	75%	68%	54%
I am Australian born, but one or more of my parents immigrated to Australia	25%	25%	23%	19%	24%	26%	28%	28%	23%	25%	30%	20%	27%	23%
I am a naturalised Australian; I immigrated from another country	10%	11%	7%	4%	4%	7%	16%	29%	4%	9%	28%	3%	4%	18%
My parents are Australian, but I was born overseas	1%	1%	2%	2%	1%	2%	1%	2%	2%	2%	1%	2%	1%	2%
Other, e.g. temporarily in Australia	2%	2%	1%	1%	1%	2%	6%	3%	1%	4%	4%	1%	1%	4%

Aboriginal or Torres Strait islander origin	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Yes	2%	1%	3%	2%	3%	2%	1%	0%	2%	0%	0%	2%	4%	2%
No	97%	97%	95%	97%	96%	96%	98%	97%	96%	97%	98%	96%	94%	96%
Do not wish to answer	2%	2%	2%	1%	2%	3%	1%	3%	1%	2%	2%	2%	2%	2%

Disabilities or physical conditions	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Sight	2%	1%	2%	1%	1%	2%	3%	2%	1%	2%	2%	2%	2%	3%
Hearing	1%	1%	0%	1%	1%	0%	1%	0%	1%	1%	1%	0%	0%	0%
Mobility	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	2%	2%	1%	2%
Intellectual	1%	1%	0%	2%	1%	1%	0%	0%	1%	1%	0%	1%	0%	0%
Other	3%	3%	3%	5%	4%	3%	1%	4%	5%	2%	2%	2%	3%	4%
No, I do not have a disability or physical condition	92%	92%	93%	92%	92%	93%	93%	90%	91%	93%	93%	96%	93%	89%
Do not wish to answer	1%	1%	1%	1%	2%	1%	1%	2%	2%	0%	1%	0%	1%	2%

# Respondent profile

Language spoken at home	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
No language other than English	86%	86%	87%	92%	92%	82%	76%	82%	92%	81%	76%	91%	86%	81%
Italian	2%	2%	2%	1%	1%	3%	4%	4%	1%	3%	4%	1%	4%	2%
Greek	2%	2%	2%	1%	1%	4%	2%	3%	1%	2%	4%	2%	4%	1%
Cantonese	0%	0%	0%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	1%
Mandarin	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%
Arabic	1%	1%	0%	0%	0%	2%	2%	1%	0%	2%	2%	0%	1%	0%
Vietnamese	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%
German	1%	1%	1%	1%	0%	1%	1%	2%	1%	2%	2%	1%	0%	2%
Spanish	2%	2%	2%	2%	1%	1%	5%	3%	1%	1%	5%	2%	2%	2%
Tagalog (Filipino)	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%
Hindi	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%
Macedonian	0%	1%	0%	0%	0%	1%	1%	1%	0%	1%	1%	1%	1%	0%
Croatian	1%	1%	1%	1%	1%	2%	1%	1%	1%	2%	2%	2%	1%	1%
Korean	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Turkish	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	1%
Polish	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other (please specify)	5%	5%	5%	3%	3%	6%	11%	6%	3%	9%	8%	3%	4%	11%



# Respondent profile

Interest in other sports	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Football/soccer	58%	59%	54%	32%	43%	65%	83%	85%	40%	72%	87%	31%	63%	77%
Swimming	34%	31%	44%	57%	38%	25%	22%	23%	42%	20%	18%	59%	31%	37%
Australian Rules/AFL Football	31%	36%	18%	26%	33%	28%	36%	34%	34%	37%	38%	14%	17%	28%
Rugby League/NRL/State of Origin	30%	34%	19%	23%	26%	28%	39%	43%	29%	32%	46%	6%	27%	29%
Tennis	28%	29%	24%	26%	32%	23%	30%	26%	32%	24%	26%	19%	24%	33%
Jogging/Running	27%	23%	37%	16%	23%	35%	36%	27%	20%	28%	27%	23%	48%	43%
Cricket	26%	31%	10%	21%	23%	21%	34%	34%	27%	31%	40%	5%	11%	18%
Cycling	21%	23%	18%	22%	18%	16%	25%	32%	21%	18%	30%	13%	19%	23%
Basketball	20%	21%	15%	22%	24%	20%	21%	5%	25%	22%	13%	16%	16%	13%
Rugby Union/Super Rugby	19%	22%	11%	16%	15%	17%	25%	28%	18%	21%	32%	5%	14%	17%
Working out at a gym	19%	17%	25%	0%	7%	37%	38%	25%	5%	36%	28%	3%	39%	42%
Skiing	16%	16%	17%	13%	13%	18%	19%	19%	13%	19%	18%	13%	19%	18%
Surfing	15%	15%	16%	12%	15%	18%	16%	16%	14%	16%	16%	12%	22%	14%
Skateboarding	15%	17%	8%	19%	23%	15%	5%	5%	24%	16%	5%	10%	9%	2%
Golf	14%	18%	4%	9%	10%	10%	20%	30%	12%	16%	33%	3%	3%	9%
Touch Football	14%	14%	16%	8%	17%	19%	15%	9%	15%	16%	10%	9%	20%	20%
Martial arts	14%	16%	9%	23%	15%	10%	9%	8%	21%	12%	9%	10%	9%	4%
Motorcar Racing	12%	14%	5%	10%	10%	10%	13%	18%	12%	12%	20%	3%	6%	8%
Dancing	11%	4%	29%	17%	10%	10%	7%	6%	6%	2%	2%	42%	23%	17%
Gymnastics	9%	5%	21%	18%	9%	6%	5%	5%	7%	2%	2%	34%	15%	11%
Netball	8%	2%	25%	8%	8%	7%	10%	9%	1%	3%	5%	35%	16%	24%
Group fitness	8%	4%	19%	2%	3%	12%	16%	10%	2%	6%	7%	5%	27%	29%
Skate sports (roller skates/roller blades)	6%	5%	7%	10%	8%	4%	2%	3%	9%	2%	2%	11%	7%	2%
Yoga or pilates	5%	2%	15%	2%	2%	8%	13%	5%	1%	2%	5%	5%	20%	22%
Horse Racing	5%	5%	5%	3%	3%	3%	10%	11%	2%	5%	12%	5%	3%	9%
Sailing/Yachting	3%	3%	4%	2%	3%	4%	4%	4%	3%	4%	4%	1%	6%	3%
Lawn Bowls	2%	2%	1%	1%	1%	2%	3%	4%	1%	2%	4%	1%	1%	2%
Other (please specify)	15%	15%	15%	14%	22%	14%	15%	6%	18%	16%	9%	19%	14%	11%
None	3%	2%	3%	2%	3%	4%	1%	2%	3%	3%	1%	3%	4%	2%

Q42. Which of the following sports or activities are you interested in as a participant or a fan? (n=2,006)

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# Respondent profile

Other lifestyle activities	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Playing sport/exercising	60%	61%	57%	63%	61%	53%	64%	54%	64%	57%	57%	55%	54%	63%
Spending time with family	52%	51%	54%	68%	55%	32%	41%	65%	59%	26%	56%	63%	40%	59%
Socialising with friends	48%	47%	54%	41%	45%	66%	52%	38%	41%	63%	43%	49%	64%	44%
Entertainment (reading, watching DVD's, going to the movies etc)	43%	41%	48%	47%	42%	45%	46%	30%	41%	45%	36%	55%	49%	37%
Playing computer games (Playstation, Xbox etc)	39%	49%	8%	51%	60%	34%	20%	4%	67%	50%	11%	14%	4%	2%
Spending time outdoors (beach, parks etc)	38%	39%	35%	56%	40%	26%	29%	35%	47%	24%	34%	43%	28%	32%
Studying for school/university	26%	24%	33%	13%	23%	56%	29%	6%	19%	52%	9%	19%	61%	12%
Browsing the internet/social media (Facebook etc)	25%	25%	27%	4%	25%	49%	30%	18%	17%	48%	22%	13%	43%	25%
Relaxing/unwinding	22%	22%	24%	16%	18%	24%	30%	31%	17%	25%	30%	19%	26%	29%
Housework/domestic duties	14%	12%	20%	3%	7%	8%	26%	40%	5%	7%	29%	4%	14%	56%
Pursuing hobbies (painting, cooking, photography etc)	12%	9%	19%	16%	10%	11%	11%	11%	9%	9%	11%	27%	15%	12%
Looking after my children	8%	9%	8%	0%	0%	0%	14%	45%	0%	1%	34%	0%	1%	31%
Eating out at cafes and restaurants	8%	7%	11%	2%	1%	6%	22%	18%	2%	6%	21%	2%	9%	29%
Attending live events (Music, art, theatre etc)	6%	6%	7%	1%	2%	9%	15%	8%	1%	10%	12%	3%	9%	12%
Volunteering/community work	5%	4%	7%	1%	2%	7%	5%	13%	1%	5%	8%	1%	9%	12%
Shopping (for clothes, jewellery etc)	4%	2%	12%	1%	4%	10%	5%	2%	1%	3%	2%	10%	19%	7%
Other (please specify)	5%	5%	5%	5%	6%	4%	4%	6%	6%	4%	4%	4%	4%	7%

# **Appendix A:**

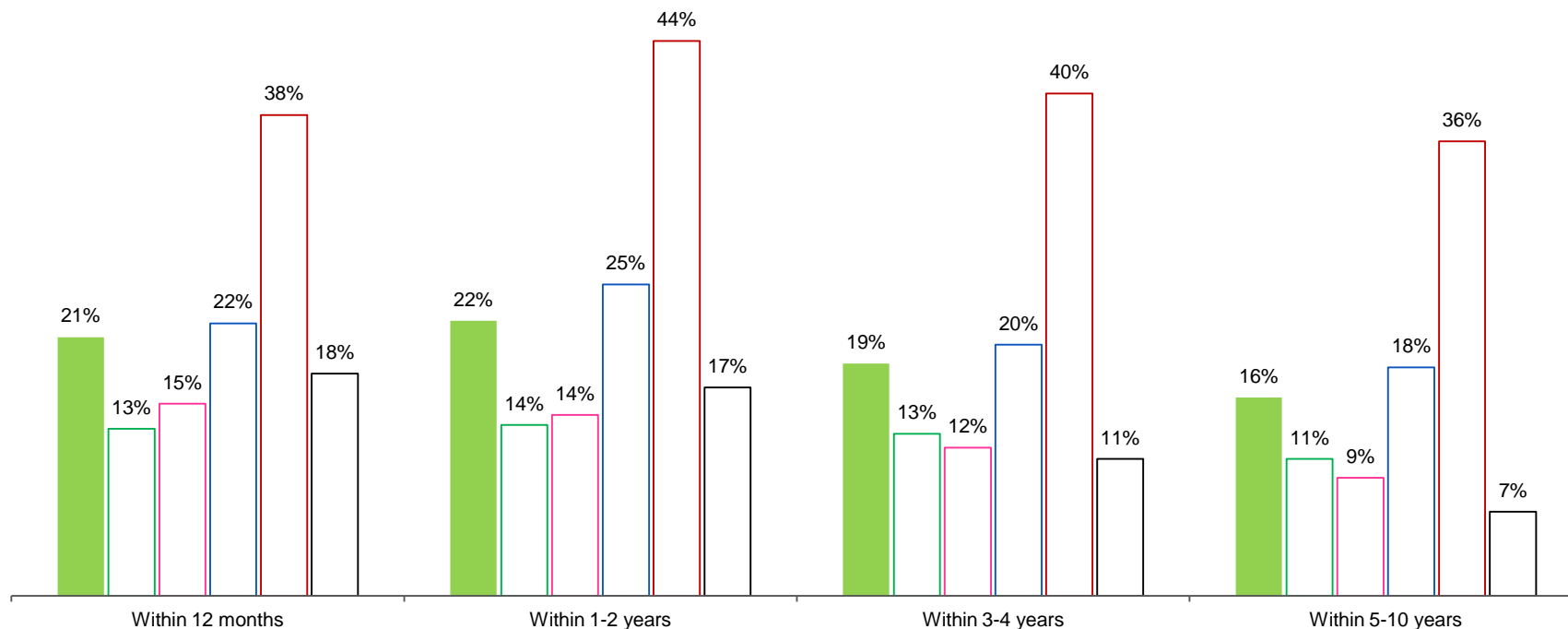
## **Detailed likelihood of playing again**

# Likelihood of playing again

Lapsed players aged between 20-34 years of age have the highest likelihood of playing again, peaking at 44% who are certain to or very likely to play again within the next one to two years. The concern for football administrators is that just a relatively small percentage of lapsed participants aged between 5-9 years are likely to play again.

Future likelihood of playing again (% certain to/very likely to)

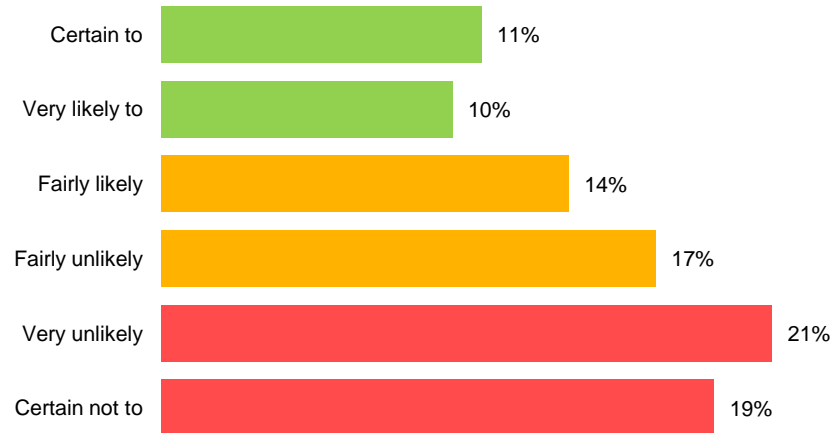
■ Total ■ 5-9 years ■ 10-14 years ■ 15-19 years ■ 20-34 years ■ 35+ years





# Likelihood of playing again in 12 months

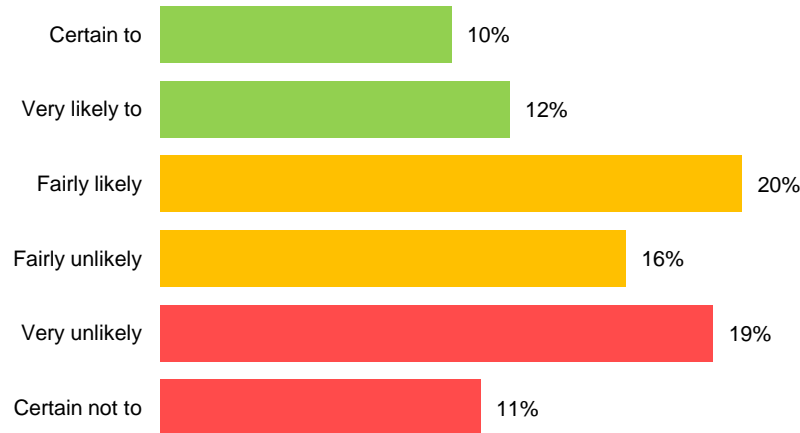
**Likelihood of playing again in 12 months – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Certain to	11%	11%	10%	8%	7%	12%	20%	8%	8%	15%	12%	4%	15%	12%
Very likely to	10%	10%	11%	6%	8%	10%	18%	10%	7%	10%	14%	6%	13%	16%
Fairly likely	14%	14%	14%	10%	11%	15%	17%	18%	10%	19%	18%	15%	12%	16%
Fairly unlikely	17%	17%	18%	19%	16%	18%	13%	21%	16%	17%	18%	20%	16%	16%
Very unlikely	21%	21%	21%	27%	25%	19%	9%	19%	26%	14%	15%	27%	18%	16%
Certain not to	19%	19%	17%	19%	25%	17%	15%	14%	23%	17%	14%	21%	17%	13%
Don't know	9%	9%	9%	11%	8%	10%	7%	10%	10%	9%	9%	8%	9%	10%
Total likely	35%	34%	35%	24%	26%	37%	56%	36%	25%	44%	45%	25%	40%	45%
Total certain to/very likely	40%	40%	38%	46%	50%	36%	24%	33%	49%	31%	29%	47%	35%	29%

# Likelihood of playing again in 1 to 2 years

Likelihood of playing again in 1 to 2 years – all lapsed players



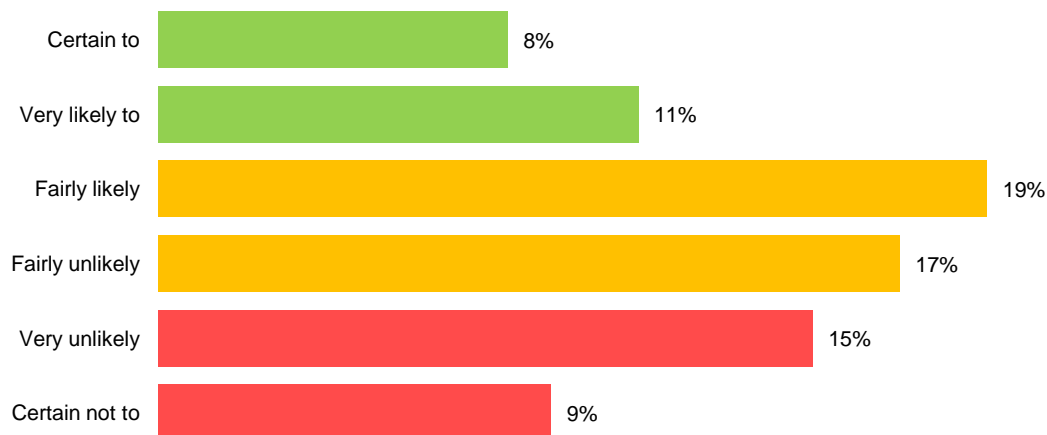
	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Certain to	10%	10%	9%	7%	6%	10%	20%	5%	7%	15%	11%	4%	14%	10%
Very likely to	12%	12%	14%	7%	8%	14%	24%	12%	7%	16%	17%	8%	17%	20%
Fairly likely	20%	19%	21%	17%	16%	21%	23%	25%	16%	22%	24%	18%	20%	28%
Fairly unlikely	16%	16%	15%	20%	16%	15%	10%	15%	18%	14%	13%	17%	14%	12%
Very unlikely	19%	20%	18%	24%	25%	15%	10%	19%	24%	14%	16%	26%	14%	13%
Certain not to	11%	11%	10%	9%	15%	9%	5%	13%	13%	7%	10%	11%	11%	6%
Don't know	13%	13%	13%	17%	14%	14%	8%	11%	15%	13%	10%	16%	11%	12%
Total likely	42%	41%	44%	31%	31%	46%	67%	41%	31%	52%	51%	30%	51%	57%
Total certain to/very likely	22%	22%	23%	14%	14%	25%	44%	17%	15%	31%	28%	12%	31%	29%

Q22. Overall, how likely is it that you will play football again (in the next 1 to 2 years)? (n=2,006)

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# Likelihood of playing again in 3 to 4 years

**Likelihood of playing again in 3 to 4 years – all lapsed players**



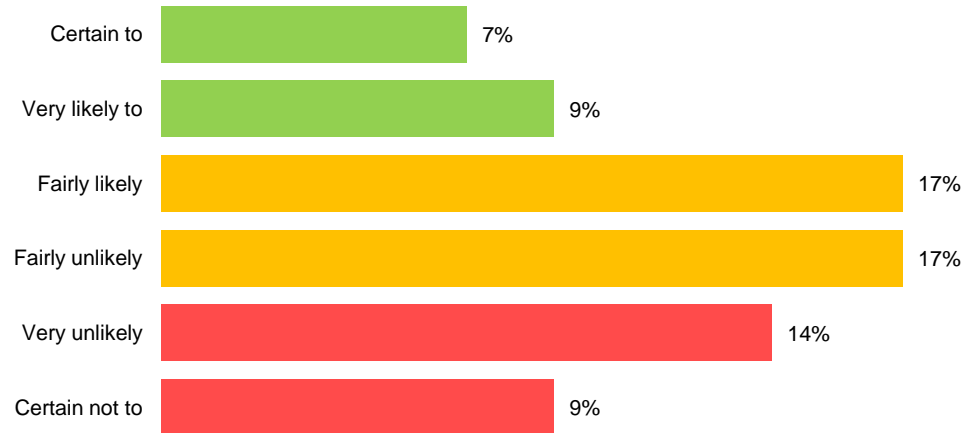
	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Certain to	8%	9%	6%	6%	5%	8%	19%	4%	6%	14%	9%	2%	9%	9%
Very likely to	11%	10%	12%	7%	7%	12%	21%	7%	7%	14%	13%	8%	14%	14%
Fairly likely	19%	18%	19%	15%	14%	24%	25%	17%	15%	23%	21%	12%	23%	24%
Fairly unlikely	17%	17%	18%	21%	18%	14%	11%	21%	19%	12%	16%	21%	17%	14%
Very unlikely	15%	15%	15%	16%	19%	10%	7%	20%	17%	9%	16%	22%	9%	12%
Certain not to	9%	10%	8%	6%	12%	8%	4%	17%	10%	6%	12%	7%	8%	8%
Don't know	22%	22%	22%	30%	25%	24%	13%	14%	27%	22%	12%	27%	20%	19%
Total likely	37%	37%	37%	28%	26%	44%	65%	28%	28%	51%	44%	22%	47%	47%
Total certain to/very likely	19%	19%	18%	13%	12%	20%	40%	11%	13%	28%	23%	10%	23%	23%

Q22. Overall, how likely is it that you will play football again (in the next 3 to 4 years)? (n=2,006)

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# Likelihood of playing again in 5 to 10 years

Likelihood of playing again in 5 to 10 years – all lapsed players



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Certain to	7%	8%	5%	5%	4%	8%	17%	3%	5%	15%	7%	1%	8%	7%
Very likely to	9%	9%	9%	6%	6%	10%	19%	4%	7%	12%	11%	4%	12%	11%
Fairly likely	17%	16%	19%	13%	13%	24%	22%	15%	13%	23%	18%	13%	22%	23%
Fairly unlikely	17%	17%	17%	21%	19%	14%	12%	19%	19%	13%	17%	22%	16%	12%
Very unlikely	14%	14%	13%	15%	17%	8%	6%	24%	16%	7%	17%	18%	8%	14%
Certain not to	9%	9%	8%	5%	11%	6%	5%	22%	9%	4%	16%	8%	7%	10%
Don't know	27%	26%	29%	35%	31%	30%	19%	14%	32%	26%	15%	34%	28%	24%
Total likely	33%	33%	33%	24%	23%	42%	58%	22%	24%	50%	36%	18%	43%	41%
Total certain to/very likely	16%	17%	14%	11%	9%	18%	36%	7%	11%	27%	19%	5%	20%	18%

Q22. Overall, how likely is it that you will play football again (in the next 5 to 10 years)? (n=2,006)

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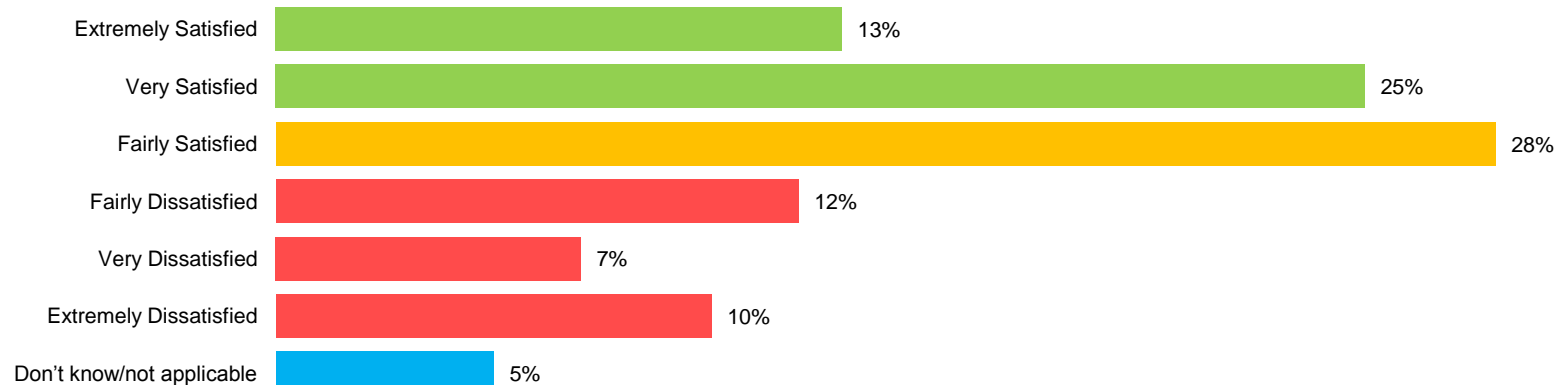


# **Appendix B:**

## **Detailed satisfaction ratings**

# Satisfaction with coaches

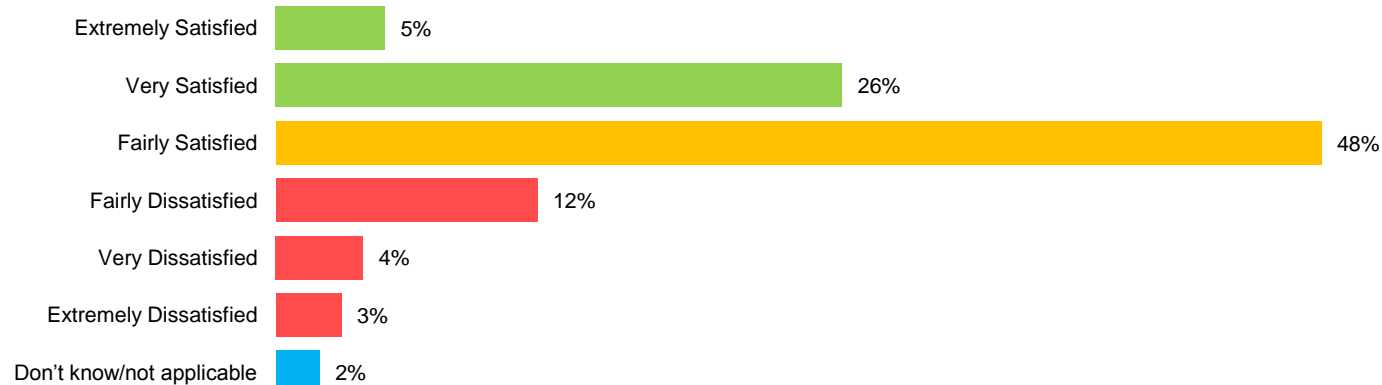
Satisfaction with coaches – all lapsed players



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	13%	12%	16%	14%	16%	15%	10%	8%	15%	14%	6%	16%	16%	16%
Very Satisfied	25%	24%	27%	28%	21%	29%	25%	22%	24%	29%	22%	26%	28%	29%
Fairly Satisfied	28%	28%	28%	27%	26%	25%	31%	36%	27%	24%	35%	26%	27%	33%
Fairly Dissatisfied	12%	11%	13%	11%	13%	12%	11%	10%	11%	12%	11%	16%	11%	11%
Very Dissatisfied	7%	7%	5%	6%	9%	6%	6%	2%	9%	7%	3%	5%	7%	3%
Extremely Dissatisfied	10%	11%	8%	10%	14%	11%	8%	4%	13%	12%	5%	8%	10%	4%
Don't know/not applicable	5%	6%	3%	3%	2%	2%	9%	18%	2%	3%	18%	3%	2%	4%
Total satisfied	66%	65%	71%	69%	63%	69%	66%	66%	65%	67%	63%	68%	71%	78%
Total extremely/very satisfied	38%	37%	43%	43%	36%	45%	35%	31%	38%	42%	28%	41%	44%	46%

# Satisfaction with facilities

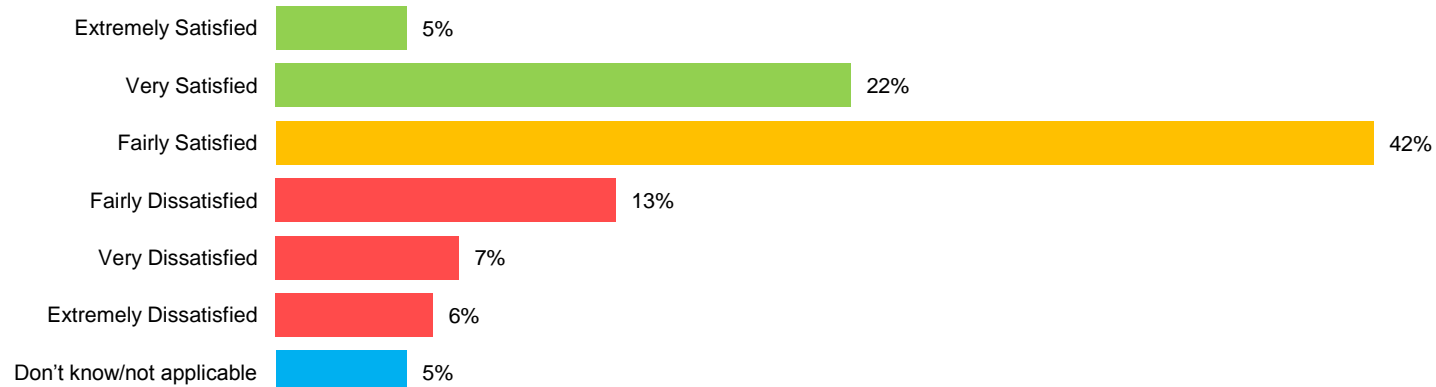
**Satisfaction with facilities– all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	5%	5%	5%	6%	6%	4%	4%	5%	6%	6%	3%	8%	2%	5%
Very Satisfied	26%	26%	25%	26%	29%	29%	20%	20%	28%	27%	19%	25%	23%	27%
Fairly Satisfied	48%	47%	50%	50%	47%	48%	47%	47%	48%	47%	45%	50%	52%	48%
Fairly Dissatisfied	12%	12%	12%	9%	10%	12%	17%	18%	10%	11%	19%	8%	15%	14%
Very Dissatisfied	4%	4%	3%	2%	3%	4%	6%	7%	3%	5%	7%	2%	3%	5%
Extremely Dissatisfied	3%	3%	3%	3%	3%	3%	5%	2%	3%	3%	4%	3%	4%	2%
Don't know/not applicable	2%	2%	2%	4%	2%	2%	1%	2%	3%	1%	2%	3%	2%	0%
Total satisfied	78%	78%	80%	82%	81%	81%	72%	72%	81%	80%	68%	83%	77%	80%
Total extremely/very satisfied	31%	31%	30%	32%	35%	32%	24%	24%	34%	33%	23%	33%	25%	32%

# Satisfaction with referees/officials

**Satisfaction with referees/officials – all lapsed players**

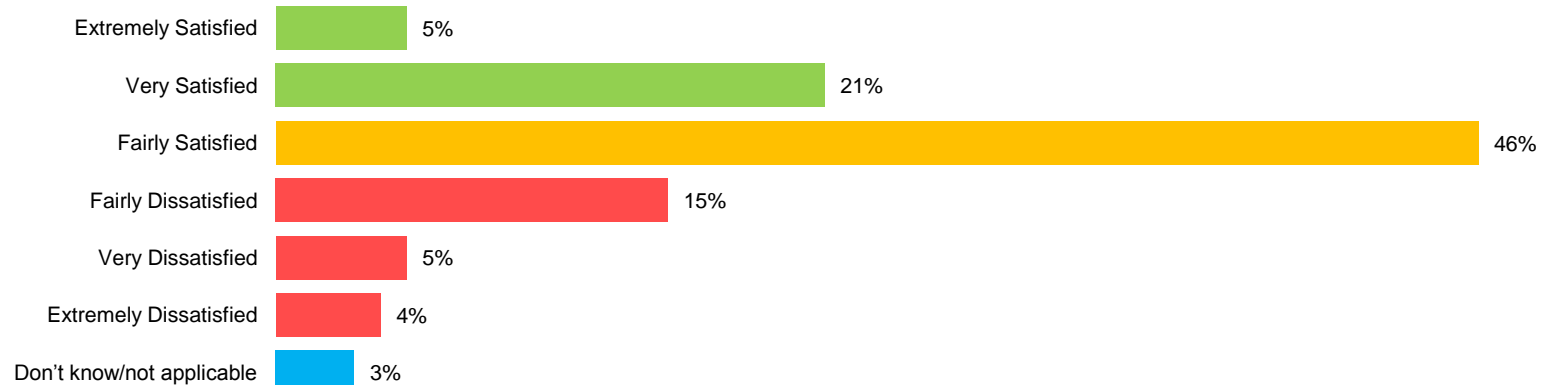


	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	5%	5%	4%	6%	6%	4%	4%	2%	6%	6%	2%	6%	2%	2%
Very Satisfied	22%	22%	25%	27%	27%	25%	12%	13%	27%	22%	10%	30%	23%	19%
Fairly Satisfied	42%	41%	44%	41%	46%	44%	36%	42%	44%	40%	37%	42%	47%	42%
Fairly Dissatisfied	13%	13%	13%	7%	9%	13%	23%	19%	8%	15%	22%	7%	15%	20%
Very Dissatisfied	7%	8%	5%	4%	4%	6%	13%	14%	4%	9%	16%	3%	4%	9%
Extremely Dissatisfied	6%	6%	5%	2%	4%	6%	11%	9%	3%	7%	11%	2%	6%	8%
Don't know/not applicable	5%	5%	5%	13%	5%	2%	2%	1%	8%	2%	2%	10%	3%	1%
Total satisfied	69%	68%	72%	75%	79%	73%	52%	57%	77%	68%	49%	77%	73%	62%
Total extremely/very satisfied	27%	27%	28%	33%	33%	29%	16%	15%	33%	28%	12%	36%	25%	20%



# Satisfaction with pitches

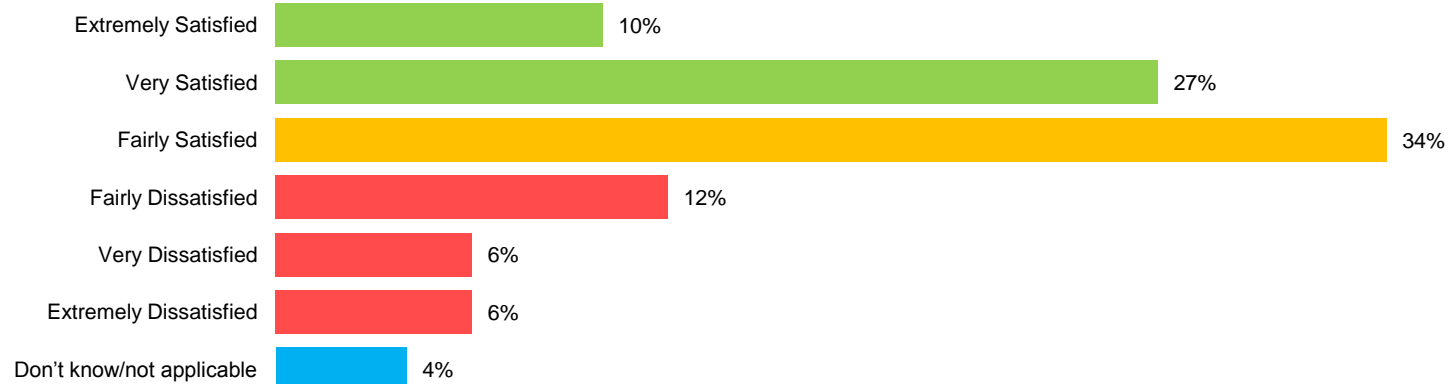
**Satisfaction with pitches – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	5%	5%	5%	6%	5%	4%	5%	3%	5%	5%	3%	6%	3%	5%
Very Satisfied	21%	21%	22%	28%	27%	21%	12%	12%	27%	19%	12%	32%	18%	13%
Fairly Satisfied	46%	45%	51%	46%	47%	52%	43%	41%	47%	46%	37%	43%	56%	56%
Fairly Dissatisfied	15%	16%	13%	10%	10%	13%	24%	26%	10%	18%	28%	11%	14%	15%
Very Dissatisfied	5%	6%	4%	3%	4%	3%	8%	11%	4%	4%	11%	3%	4%	7%
Extremely Dissatisfied	4%	5%	3%	2%	3%	5%	7%	6%	3%	6%	8%	3%	4%	3%
Don't know/not applicable	3%	3%	2%	5%	3%	3%	1%	1%	4%	2%	1%	3%	2%	1%
Total satisfied	72%	71%	78%	80%	79%	76%	60%	56%	79%	71%	52%	80%	77%	74%
Total extremely/very satisfied	26%	26%	27%	34%	32%	25%	17%	15%	32%	24%	15%	37%	21%	18%

# Satisfaction with club administration

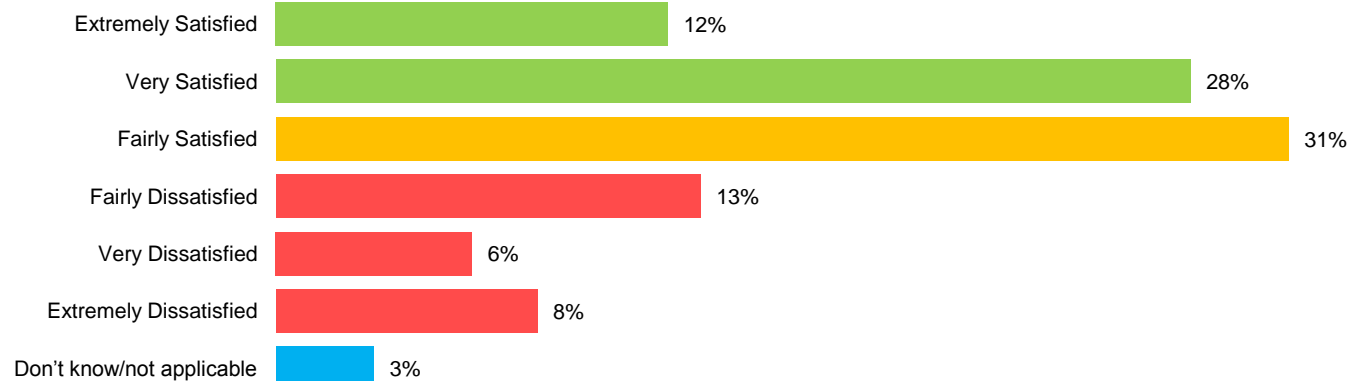
**Satisfaction with club administration – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	10%	9%	12%	9%	10%	10%	12%	11%	8%	10%	11%	12%	12%	11%
Very Satisfied	27%	26%	29%	26%	23%	30%	26%	34%	23%	29%	30%	31%	23%	37%
Fairly Satisfied	34%	34%	35%	35%	32%	36%	35%	35%	34%	34%	35%	31%	43%	29%
Fairly Dissatisfied	12%	13%	10%	13%	16%	9%	13%	10%	16%	9%	12%	10%	10%	11%
Very Dissatisfied	6%	7%	5%	7%	7%	5%	6%	5%	8%	7%	5%	6%	4%	3%
Extremely Dissatisfied	6%	6%	5%	6%	8%	7%	4%	3%	8%	7%	2%	6%	6%	4%
Don't know/not applicable	4%	4%	4%	4%	4%	4%	5%	4%	4%	4%	5%	4%	3%	6%
Total satisfied	71%	70%	76%	70%	65%	76%	73%	79%	65%	73%	76%	73%	78%	77%
Total extremely/very satisfied	37%	35%	41%	35%	33%	41%	37%	44%	31%	39%	41%	43%	35%	48%

# Satisfaction with club environment/culture

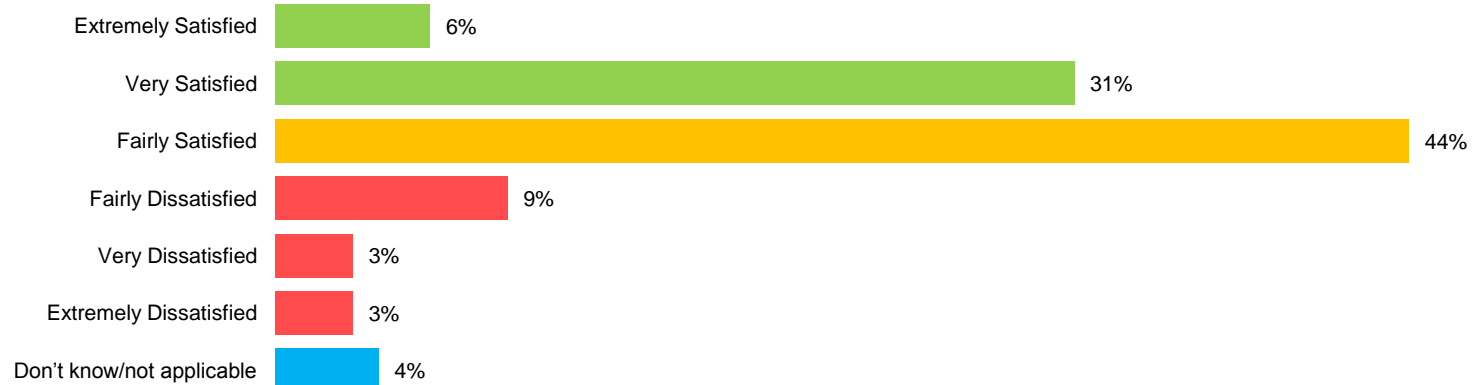
Satisfaction with club environment / culture – all lapsed players



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	12%	12%	11%	9%	9%	11%	16%	15%	9%	14%	16%	10%	10%	14%
Very Satisfied	28%	26%	33%	25%	23%	30%	29%	37%	21%	29%	34%	34%	31%	35%
Fairly Satisfied	31%	32%	29%	35%	32%	33%	28%	28%	34%	30%	30%	29%	36%	20%
Fairly Dissatisfied	13%	13%	12%	14%	14%	9%	14%	11%	15%	10%	11%	11%	9%	17%
Very Dissatisfied	6%	6%	5%	5%	9%	5%	5%	3%	8%	6%	3%	4%	4%	7%
Extremely Dissatisfied	8%	8%	7%	8%	10%	9%	5%	4%	10%	9%	4%	7%	8%	6%
Don't know/not applicable	3%	3%	3%	4%	4%	2%	3%	2%	4%	2%	3%	5%	2%	2%
Total satisfied	71%	70%	73%	69%	63%	75%	73%	80%	64%	73%	79%	72%	77%	69%
Total extremely/very satisfied	39%	38%	44%	34%	32%	42%	46%	52%	30%	43%	50%	43%	42%	49%

# Satisfaction with quality of competition

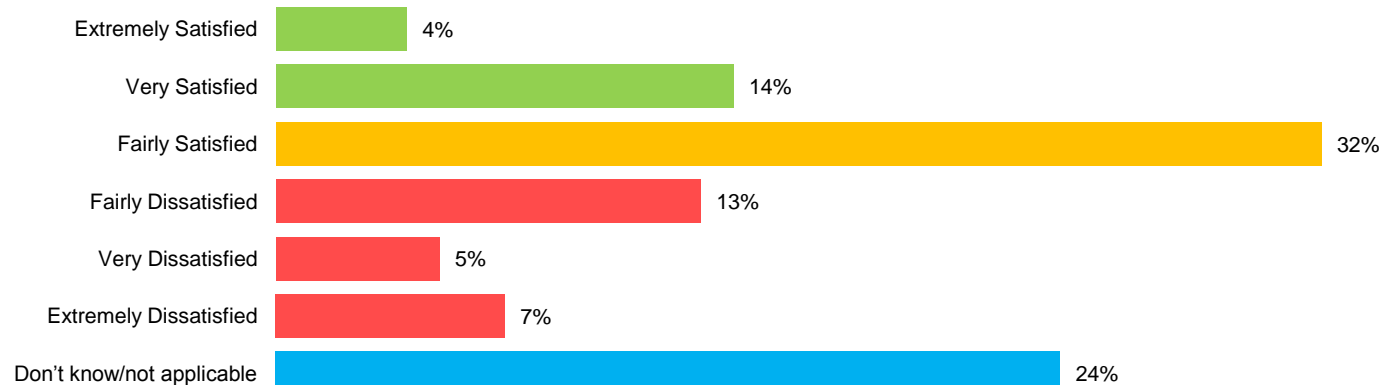
**Satisfaction with competition quality – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	6%	7%	5%	6%	7%	7%	6%	5%	7%	8%	5%	5%	5%	7%
Very Satisfied	31%	30%	33%	26%	29%	34%	32%	37%	27%	36%	33%	32%	30%	39%
Fairly Satisfied	44%	44%	44%	47%	44%	42%	45%	43%	46%	39%	45%	40%	49%	41%
Fairly Dissatisfied	9%	9%	9%	8%	10%	9%	10%	8%	9%	9%	9%	8%	7%	11%
Very Dissatisfied	3%	4%	3%	2%	4%	4%	3%	3%	3%	4%	4%	3%	4%	0%
Extremely Dissatisfied	3%	3%	3%	2%	4%	3%	2%	3%	3%	3%	2%	3%	4%	2%
Don't know/not applicable	4%	4%	4%	10%	3%	2%	1%	1%	6%	1%	2%	7%	2%	1%
Total satisfied	81%	81%	82%	78%	80%	82%	83%	86%	79%	83%	83%	77%	84%	86%
Total extremely/very satisfied	37%	37%	38%	31%	36%	41%	38%	43%	33%	44%	38%	37%	35%	46%

# Satisfaction with grading process

**Satisfaction with grading process – all lapsed players**

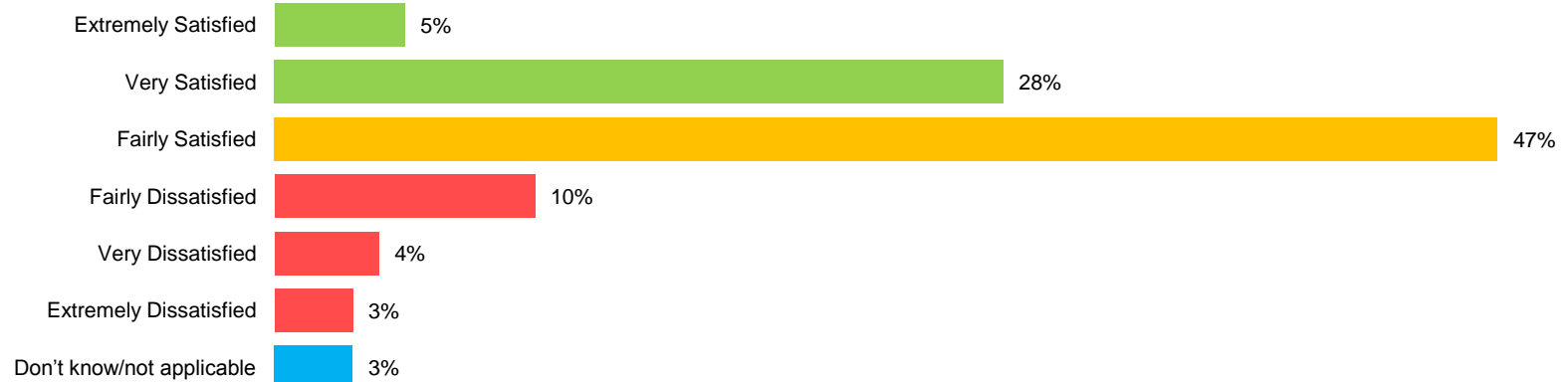


	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	4%	4%	3%	4%	4%	3%	7%	3%	4%	6%	5%	3%	2%	4%
Very Satisfied	14%	14%	14%	9%	13%	19%	14%	17%	11%	17%	16%	10%	18%	15%
Fairly Satisfied	32%	31%	34%	26%	32%	36%	36%	30%	29%	36%	32%	31%	38%	31%
Fairly Dissatisfied	13%	14%	12%	8%	17%	13%	15%	12%	14%	15%	13%	12%	12%	11%
Very Dissatisfied	5%	6%	5%	3%	9%	6%	5%	1%	7%	7%	2%	6%	5%	3%
Extremely Dissatisfied	7%	8%	6%	6%	11%	7%	5%	6%	9%	7%	4%	5%	6%	7%
Don't know/not applicable	24%	23%	27%	45%	15%	16%	19%	32%	26%	12%	27%	33%	19%	29%
Total satisfied	50%	49%	51%	38%	48%	58%	57%	50%	44%	58%	53%	44%	58%	50%
Total extremely/very satisfied	18%	18%	17%	12%	17%	22%	21%	20%	15%	22%	21%	13%	20%	20%



# Satisfaction with fixtures

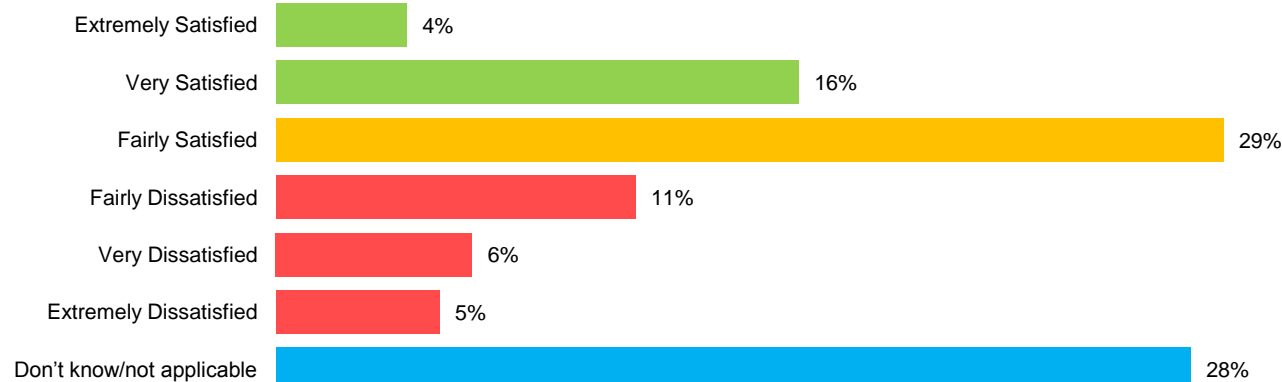
Satisfaction with fixtures – all lapsed players



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	5%	6%	4%	5%	6%	6%	7%	3%	5%	8%	5%	6%	3%	2%
Very Satisfied	28%	28%	27%	26%	27%	30%	30%	28%	27%	30%	29%	25%	28%	31%
Fairly Satisfied	47%	47%	46%	46%	47%	46%	46%	49%	48%	49%	44%	41%	47%	51%
Fairly Dissatisfied	10%	10%	12%	12%	10%	8%	10%	12%	10%	6%	12%	13%	12%	10%
Very Dissatisfied	4%	4%	3%	3%	4%	5%	3%	5%	4%	3%	5%	3%	5%	2%
Extremely Dissatisfied	3%	3%	4%	3%	5%	3%	3%	2%	4%	2%	2%	5%	4%	3%
Don't know/not applicable	3%	2%	4%	5%	2%	3%	1%	2%	3%	2%	2%	6%	3%	2%
Total satisfied	80%	81%	77%	77%	79%	82%	83%	80%	80%	86%	79%	72%	77%	84%
Total extremely/very satisfied	33%	34%	31%	31%	33%	36%	37%	30%	32%	38%	35%	31%	31%	33%

# Satisfaction with opportunities to progress

**Satisfaction with opportunities to progress – all lapsed players**

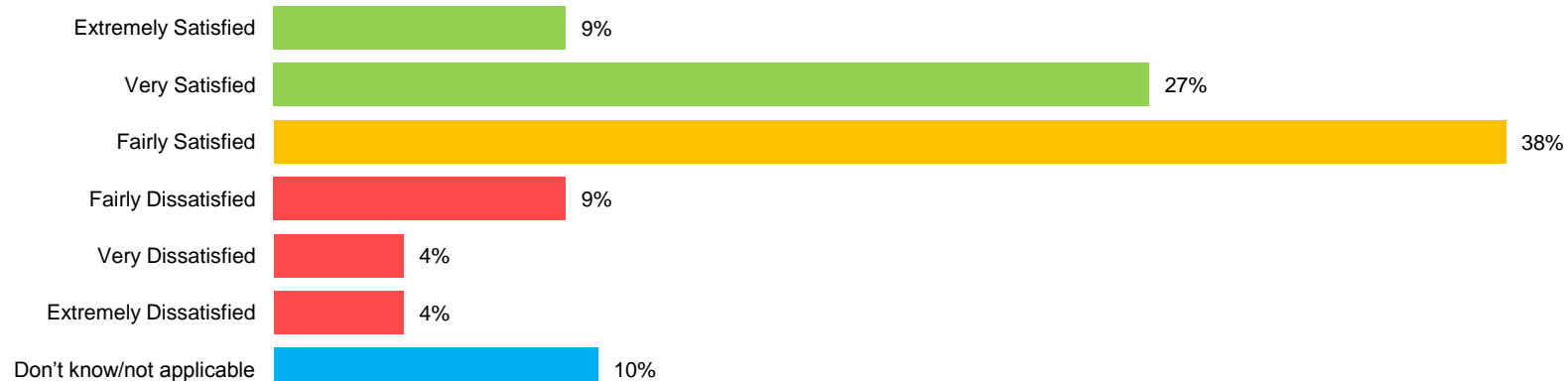


	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	4%	5%	2%	3%	4%	4%	8%	4%	4%	6%	7%	2%	2%	4%
Very Satisfied	16%	15%	17%	11%	15%	19%	16%	18%	13%	18%	17%	14%	16%	24%
Fairly Satisfied	29%	28%	33%	23%	29%	33%	33%	30%	26%	32%	29%	29%	41%	29%
Fairly Dissatisfied	11%	11%	12%	8%	14%	15%	11%	6%	12%	14%	6%	9%	16%	11%
Very Dissatisfied	6%	7%	4%	5%	9%	7%	7%	1%	8%	9%	4%	3%	4%	4%
Extremely Dissatisfied	5%	6%	4%	2%	7%	7%	6%	2%	6%	8%	4%	3%	6%	3%
Don't know/not applicable	28%	28%	27%	48%	23%	15%	20%	38%	32%	14%	34%	40%	16%	25%
Total satisfied	49%	48%	52%	37%	48%	55%	56%	53%	43%	55%	53%	45%	58%	56%
Total extremely/very satisfied	20%	20%	19%	14%	19%	23%	24%	23%	17%	23%	24%	16%	17%	28%

Q34. How satisfied or dissatisfied were you with the following aspects of your most recent experience of playing football (over the duration of the season) – OPPORTUNITIES TO PROGRESS TO A HIGHER STANDARD OF COMPETITION? (n=2,006)

# Satisfaction with social opportunities

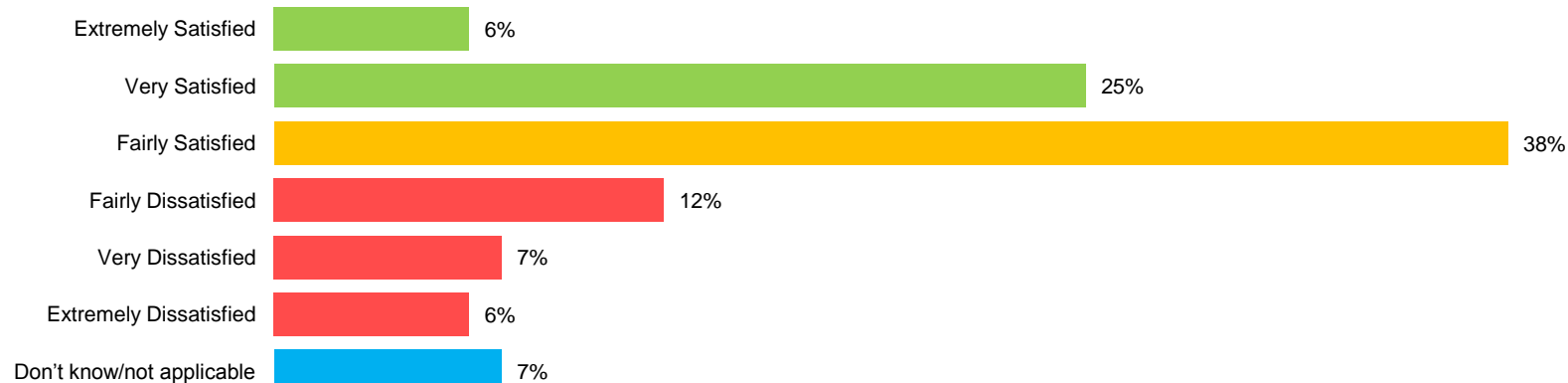
**Satisfaction with social opportunities – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	9%	8%	10%	6%	6%	8%	15%	11%	5%	10%	12%	9%	9%	13%
Very Satisfied	27%	26%	30%	23%	22%	30%	27%	40%	21%	28%	33%	28%	29%	37%
Fairly Satisfied	38%	38%	36%	36%	39%	40%	39%	34%	39%	40%	37%	36%	41%	31%
Fairly Dissatisfied	9%	10%	8%	10%	12%	8%	9%	6%	12%	9%	7%	8%	9%	8%
Very Dissatisfied	4%	4%	3%	5%	5%	4%	3%	1%	5%	4%	1%	4%	3%	2%
Extremely Dissatisfied	4%	4%	4%	3%	4%	4%	3%	3%	4%	3%	2%	3%	4%	4%
Don't know/not applicable	10%	11%	8%	17%	12%	6%	5%	6%	14%	6%	7%	12%	5%	4%
Total satisfied	74%	72%	77%	65%	67%	78%	80%	85%	65%	79%	83%	73%	79%	81%
Total extremely/very satisfied	36%	34%	41%	29%	28%	38%	42%	51%	26%	39%	46%	37%	38%	50%

# Satisfaction with training program

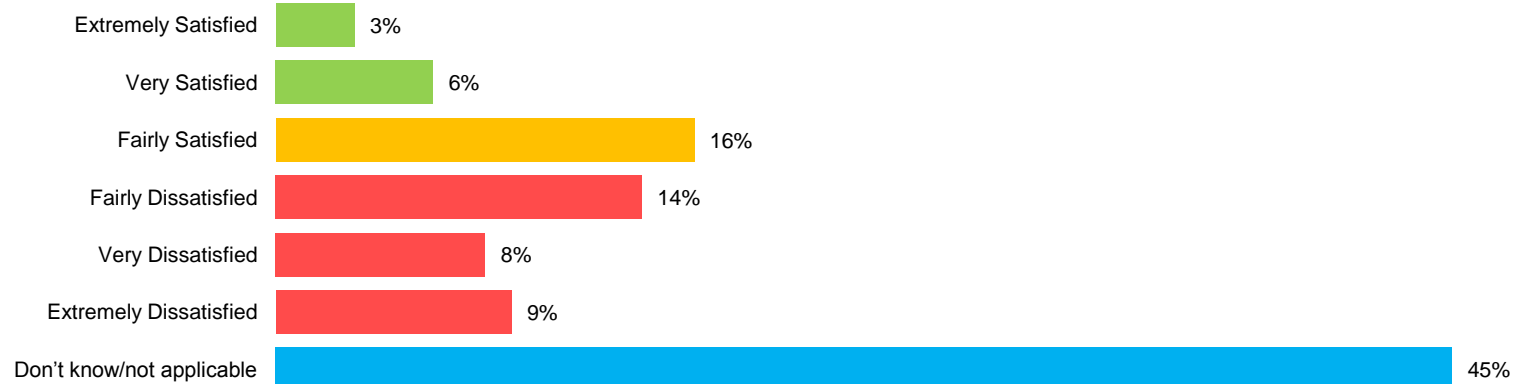
**Satisfaction with training program – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	6%	6%	7%	7%	6%	7%	6%	4%	6%	8%	5%	7%	5%	7%
Very Satisfied	25%	25%	26%	25%	21%	30%	25%	27%	23%	29%	25%	21%	29%	33%
Fairly Satisfied	38%	37%	39%	33%	43%	37%	36%	37%	38%	35%	37%	40%	41%	34%
Fairly Dissatisfied	12%	11%	13%	13%	11%	10%	13%	12%	11%	12%	12%	14%	12%	11%
Very Dissatisfied	7%	7%	5%	6%	9%	7%	6%	3%	9%	7%	5%	5%	6%	5%
Extremely Dissatisfied	6%	6%	4%	8%	7%	5%	4%	1%	8%	6%	2%	4%	5%	2%
Don't know/not applicable	7%	7%	6%	9%	3%	3%	9%	16%	5%	4%	15%	8%	3%	8%
Total satisfied	69%	68%	72%	65%	69%	74%	67%	69%	67%	71%	67%	68%	75%	74%
Total extremely/very satisfied	31%	31%	33%	32%	27%	37%	31%	32%	29%	37%	29%	28%	34%	40%

# Satisfaction with access to support services

**Satisfaction with training program – all lapsed players**



	Total	Gender		Age					Gender x Age					
	2012	Male	Female	5-9	10-14	15-19	20-34	35+	M ≤ 14	M 14 < 24	M ≥ 25	F ≤ 14	F 14 < 24	F ≥ 25
Extremely Satisfied	3%	3%	2%	2%	2%	4%	4%	2%	2%	5%	3%	3%	2%	2%
Very Satisfied	6%	6%	8%	3%	5%	10%	8%	6%	4%	9%	6%	4%	9%	11%
Fairly Satisfied	16%	16%	18%	13%	16%	17%	18%	18%	13%	19%	18%	20%	18%	14%
Fairly Dissatisfied	14%	14%	13%	7%	12%	18%	18%	18%	10%	18%	20%	7%	16%	16%
Very Dissatisfied	8%	7%	8%	2%	6%	7%	13%	12%	5%	8%	12%	3%	10%	13%
Extremely Dissatisfied	9%	9%	8%	5%	5%	13%	13%	12%	6%	13%	13%	3%	11%	10%
Don't know/not applicable	45%	45%	44%	68%	54%	31%	27%	32%	60%	29%	28%	60%	33%	34%
Total satisfied	25%	24%	27%	18%	23%	31%	29%	26%	19%	32%	27%	26%	29%	27%
Total extremely/very satisfied	9%	9%	10%	5%	7%	13%	11%	8%	6%	14%	9%	6%	11%	13%

Q34. How satisfied or dissatisfied were you with the following aspects of your most recent experience of playing football (over the duration of the season) – ACCESS TO SUPPORT SERVICES, SUCH AS DOCTORS AND PHYSIOTHERAPISTS? (n=2,006)