

Small-sided Football Insight Report: Informing Local Football Facility Plans May 2018

APPENDIX



**SPORT
ENGLAND**



**Premier
League**

**Football
Foundation**



Department for
Digital, Culture
Media & Sport

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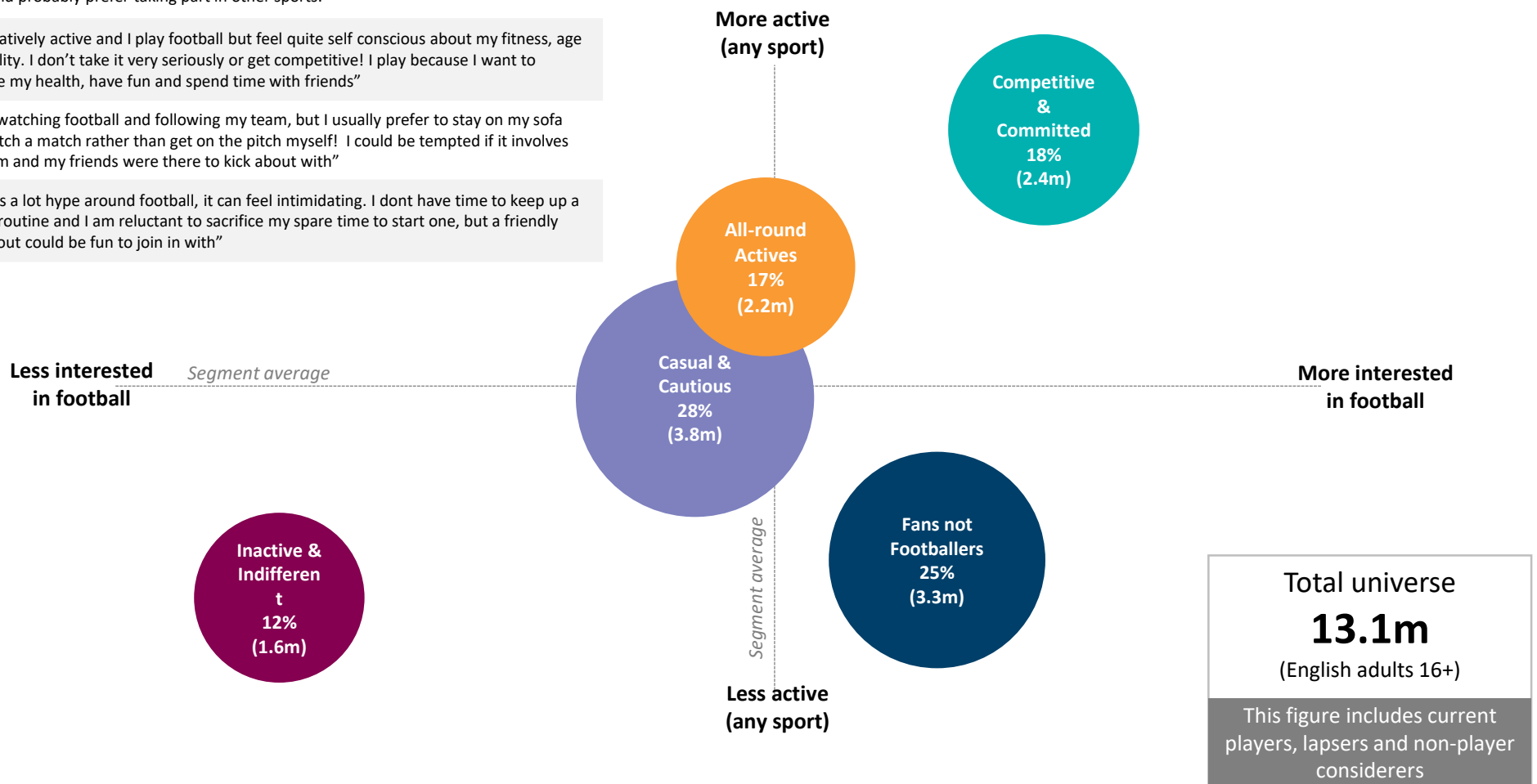
Introducing the segments

*Additional profiling detail on the small sided football segments
(including case studies)*

We have identified 5 different segments in the small sided football audience; level of sport 'activeness' and interest in football pulls them apart

Segment profiles

Competitive & Committed	"Sport is part of my everyday life, it's my social life and I love watching and playing football. I play a lot of football and I am passionate about the game, I love to win!"
All-round Actives	"I love exercising, it makes me feel good, look good, and it's a great way to socialise. Football definitely helps with this but it isn't my only sport, I'm not that into following a team and probably prefer taking part in other sports."
Casual & Cautious	"I'm relatively active and I play football but feel quite self conscious about my fitness, age and ability. I don't take it very seriously or get competitive! I play because I want to improve my health, have fun and spend time with friends"
Fans not Footballers	"I love watching football and following my team, but I usually prefer to stay on my sofa and watch a match rather than get on the pitch myself! I could be tempted if it involves my team and my friends were there to kick about with"
Inactive & Indifferent	"There's a lot hype around football, it can feel intimidating. I dont have time to keep up a fitness routine and I am reluctant to sacrifice my spare time to start one, but a friendly kick-about could be fun to join in with"

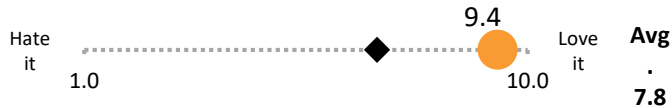


“COMPETITIVE & COMMITTED” – Segment Summary

“Sport is part of my everyday life, it’s my social life and I love watching and playing football. I play a lot of football and I am passionate about the game, I love to win!”

WHAT ATTITUDES DEFINE THEM?

OVERALL ATTITUDE TO FOOTBALL



Take SSF seriously: **54%** (141)

I **always feel motivated** to take part in sport/exercise 93% (163)

I most enjoy exercise/sport that is **competitive** 82% (144)

I **like to have variety** when I’m exercising 81% (133)

I want to become **part of a club / community** 61% (136)

I’m a **passionate football fan**, it’s a big part of who I am 87% (150)

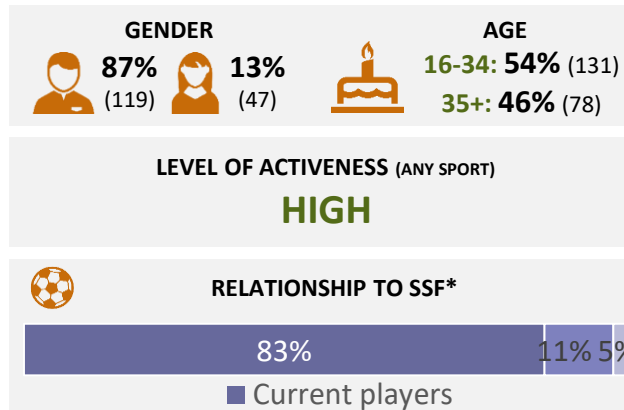
I **watch football on TV or in person every week** 93% (139)

REASONS FOR PLAYING SMALL SIDED FOOTBALL

“ To improve my fitness 64% (160), to help me feel good 46% (164), for some me time 36% (180) ”

WHO ARE THEY?

Skew Male and to the younger age groups



WHAT DO THEIR SESSIONS LOOK LIKE?

WHERE

Top: Leisure centre, Park, Specialist
 Skews: Specialist, Leisure centre

TYPE

Top: 5 a side and informal (no hire)
 Skews: 5, 4-9 a-side

WHEN

Weekday 70% (131)
 Weekend 24% (72)
 Afternoon 17% (59)
Evening 63% (140)

WHO

Mainly Friends
 Higher for:
 My club/team



WHAT WOULD MAKE THEM PLAY MORE?

If I worked different or few hours	35% (159)
If it was easier to find other people to play against	23% (135)
If the pitches in my area were of better quality	17% (142)
If I could play indoors	17% (142)

WHAT STOPS THEM PLAYING?

Work commitments	32% (133)
Bad weather	32% (139)
Concerns about being injured	21% (131)
Pitches not being close enough/time taken to travel	18% (120)

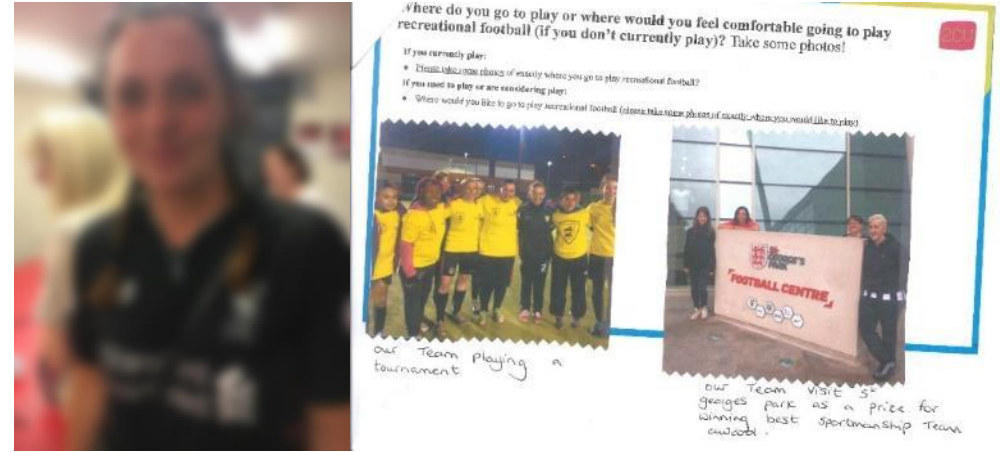
“COMPETITIVE & COMMITTED” – Case Study



Steve, 34yrs from Manchester

- Played consistently from junior level and now plays for his local ‘town team’ as well as various pub teams
- Plays 5-a-side with mates on 3G pitches – block books a session and organises the matches via WhatsApp
- Plays small-sided tournaments. He’s in it to win it
- Likes football to be played *properly* and among high quality players (his team and his opponents)

When you play football you do want to win, it becomes more important and more serious



Kate, 38 yrs from Nottingham

- Plays on a Monday night in an all women’s league: The Female Football Fives
- She used to play at college and has loved Liverpool FC since she was a child.
- She’s since had two children (13yrs and 16yrs) and 2 years ago she went back to playing football and joined Female Football Fives, a 5 aside league
- She has a renewed passion in football both as fan and player (season ticket holder for Nottingham County Ladies FC)
- She’s now a trained football coach

The Female football fives are brill as there are a lot of new ladies of all ages, fitness and many haven’t played for a while

“COMPETITIVE & COMMITTED”



SIZE

18%

WHAT MAKES THEM AN OPPORTUNITY?

The most enthusiastic and motivated small sided football playing segment – they are the primary and most passionate users of SSF provision

HOW DO WE TAP INTO THIS SEGMENT?

CONVENIENCE

- Need an **easily accessible booking process** with details on the most appropriate sessions – potentially via an app
- Ensure availability on **weekday evenings**
- Enable **group bookings** but also the opportunity to **join a club**
- As they play all year round, make sure options are available throughout such as **indoor**

PITCHES/VENUE

- Focus on **structured / organised sessions**
- Reach them through **leisure /sports centres**
- Increase access to **quality 3G pitches**
- **Improve structured grass pitches** (e.g. turf draining)
- Provide **multiple pitches** – to help with availability

FACILITY ‘MUST HAVES’

- Provide facilities that enhance their football match experience that don’t hinder their play such as **quality goals** (hung nets and goal frames) and **markings on the pitch**
- Improve **changing rooms**
- Enable access to **referees**

ENGAGEMENT

- Connect with them through offering **competitions and socials**
- **Advanced training and competition style league** will help with this, also giving them the chance to **connect with likeminded players**
- Potentially reach them **via social media** or promotion via **leisure / sports centres**

WATCH OUT: Ensure a balance in catering to this more elite segment (already well served) with more accessible SFF for other segments

“ALL ROUND ACTIVES” – Segment Summary

“I love exercising, it makes me feel good, look good, and it’s a great way to socialise. Football definitely helps with this but it isn’t my only sport, I’m not that into following a team and probably prefer taking part in other sports.”

WHAT ATTITUDES DEFINE THEM?

OVERALL ATTITUDE TO FOOTBALL



Take SSF seriously: 41% (106)

I like to have **variety** when I’m exercising 85% (139)

I **always feel motivated** to take part in sport/exercise 75% (132)

I like to be able to **set personal goals and challenges** 82% (124)

Exercise/sport helps me to **relieve stress and tension** 87% (116)

The **hype around the professional game puts me off** football 50% (125)

I’m only really **interested in football when the England national team plays** 47% (147)

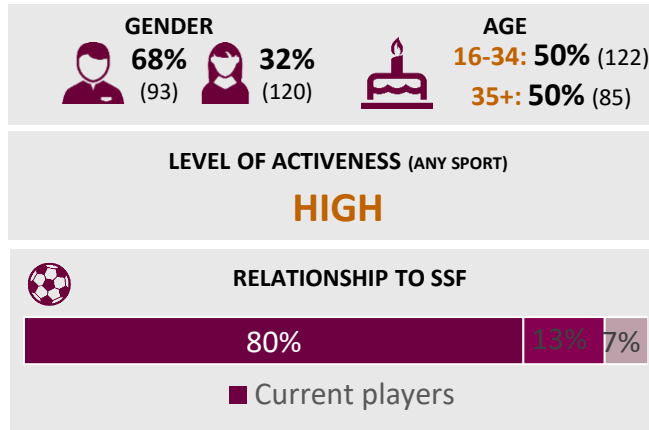
REASONS FOR PLAYING SMALL SIDED FOOTBALL



To have fun 57% (114), to help me feel good 34% (121), to be part of a club/team 24% (133), to help me train for another sport 12% (150)

WHO ARE THEY?

Skew Female and to the younger age groups



WHAT DO THEIR SESSIONS LOOK LIKE?

WHERE

Top: Park, Leisure centre
 Skews: Leisure centre

TYPE

Top: 5 a side and informal (no hire)
 No skews

WHEN

Weekday 58% (110)
 Weekend 30% (91)

Morning 11% (139)
 Afternoon 29% (98)
 Evening 46% (101)

WHO

Mainly Friends
 Higher for:
 • Family



WHAT WOULD MAKE THEM PLAY MORE?

If my friends also played in a team	29% (121)
If it was easier to find a venue to play at	20% (133)
If it was less expensive to join a team	17% (142)
If I wasn’t playing other sports	13% (144)
If I knew more women that played	12% (150)

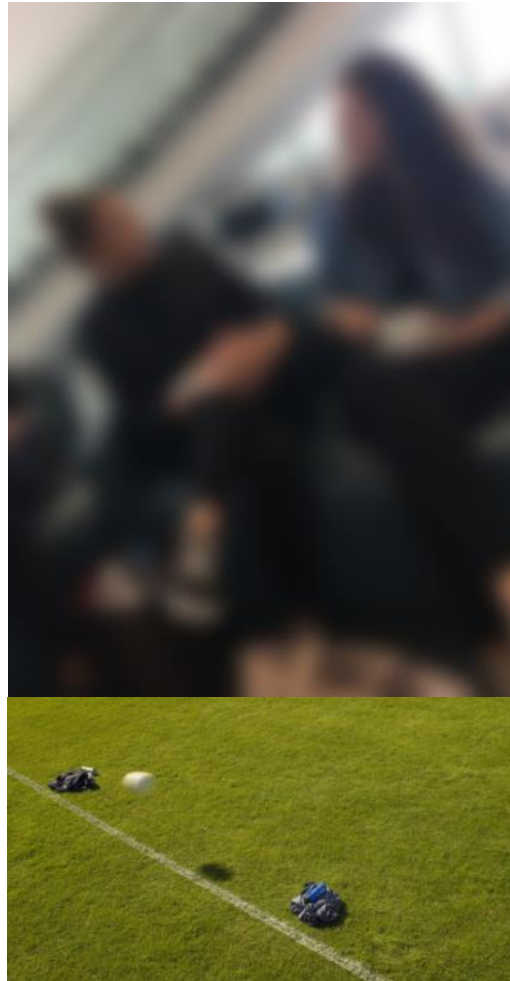
WHAT STOPS THEM PLAYING?

Lack of time generally	31% (124)
Family commitments	31% (129)
Cliquey teams	20% (125)
Aggressiveness from other players	20% (133)
Other sporting commitments	17% (189)

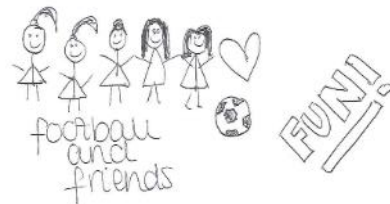
“ALL ROUND ACTIVES” – Case Study

Laura, 22 yrs from Manchester

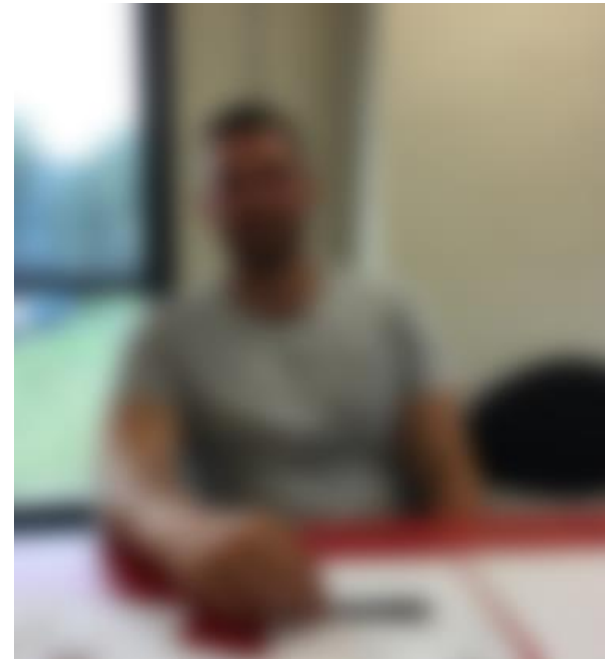
- Lauren plays recreational football once a week on a Thursday evening with a small group of friends (all women)
- Plays at Haughton park in the summer months – it’s close to home
- During the winter months they rent the sports hall at the local school and play on a hard surface
- She mostly goes to lose weight and have some fun. Nobody takes it too seriously
- No real sense of the final score
- Use their coats/jackets for goals. She always keeps a football in the boot of their car



Your relationship with football over time:
Please find images that represents your relationship with football and how it



We just wanted to have some fun, lose a bit of weight and have a laugh



I used to play a lot more when I was younger at the Soccer dome. Nowadays, it’s quite expensive and I play more basketball so I tend to only more casually

Mike, 27yrs from Nottingham

- Works as a PE teacher at a local secondary school
- His sport of choice is basketball. He plays at a really high level and loves the workout it provides
- Football is more of an occasional and social sport. A chance to have a laugh with a few colleagues
- Or more casually with family and friends in the park when having picnics or BBQ

“ALL ROUND ACTIVES”



SIZE

17%

WHAT MAKES THEM AN OPPORTUNITY?

Though sporting ‘all-rounders’ by nature, they play a lot of football and value the way it helps them fulfil their health/fitness goals. A challenge for football to give them additional benefits over other sports

HOW DO WE TAP INTO THIS SEGMENT?

CONVENIENCE

- Target them via **multi-sports facilities** that they already use (e.g. their gym / swimming pool) so convenient to their current lifestyle
- Needs to be **local to work / home**. As they have the motivation for a lot of sports, convenience may win out for other sports

PITCHES/VENUE

- We know they currently take part in a lot of **outdoor sports** (e.g. running), so outdoor facilities should be a focus

FACILITY ‘MUST HAVES’

- Focus on the **hygiene factors; changing rooms, toilets, showers** – this group will have a point of comparison with facilities used for other sports so need to be high quality

ENGAGEMENT

- As they **enjoy variety and learning new skills**, offer **different sessions** (e.g. Futsal)
- Target ‘sporty’ women in this segment by communicating **women only & mixed sessions**
- **Communicate the benefits of football** above other sports
- Help them connect & play with others through **social media or promotion via leisure centres**

WATCH OUT: A lot of competition for their time due to other sporting commitments; unlikely to significantly grow the SSF category

“CASUAL AND CAUTIOUS” – Segment Summary

“I’m relatively active and I play football but feel quite self conscious about my fitness, age and ability. I don’t take it very seriously or get competitive! I play because I want to improve my health, have fun and spend time with friends”

WHAT ATTITUDES DEFINE THEM?

OVERALL ATTITUDE TO FOOTBALL



Take SSF seriously: 34% (89)

Football is good for your physical health 61% (74)

Exercise/sport is just fun 58% (109)

Football is a social sport to play 61% (79)

I feel guilty if I don't exercise/play sport 57% (98)

I like to be able to set personal goals and challenges 51% (77)

I like to have variety when I'm exercising 52% (85)

Football is a sport anyone can play, regardless of ability 54% (77)

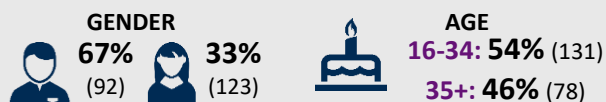
I struggle to maintain a regular exercise routine 52% (111)

REASONS FOR PLAYING SMALL SIDED FOOTBALL

To develop my skills 20% (100), To get me out of the house 22% (88), To spend time with my friends 30% (75), To improve my fitness 28% (70)

WHO ARE THEY?

Skew Female and to the younger age groups



LEVEL OF ACTIVENESS (ANY SPORT)

MODERATE



RELATIONSHIP TO SSF*



WHAT DO THEIR SESSIONS LOOK LIKE?

WHERE

Top: Park, Leisure centre
Skews: School, Community Centre

TYPE

Top: 5 a side and informal (no hire)
Skews: Walking football, Futsal

WHEN

Weekday 44% (83)
Weekend 43% (132)

Morning 10% (127)
Afternoon 37% (126)
Evening 39% (86)

WHO

Mainly Friends
Higher for:
• Family
• My children



WHAT WOULD MAKE THEM PLAY MORE?

If I was fitter	22% (88)
If I was better at football	20% (105)
If I had fewer family commitments	19% (86)
If it was easier to find a venue to play at	17% (113)
If there was a venue closer	17% (100)
If it was less expensive at my local venue	17% (121)

WHAT STOPS THEM PLAYING?

My age	22% (100)
Family commitments	20% (83)
Cost of kit	18% (138)
My own limited skill level	17% (106)
Cost of hiring facilities/club membership	17% (94)

“CASUAL AND CAUTIOUS”

Cathy, 32 yrs from Nottingham

- For the last 4 to 5 years Claire has played 5-aside at Kimberley leisure centre
- It's attached to a school and is really local to where she lives. She can walk there from home after work.
- All the players are women and they have become firm friends and Thursday evenings have become a real social occasion
- They have an Organiser who makes the games happen, she encourages the women to turn up, and play no matter their ability and she keeps the momentum
- It's not taken too seriously and her team are the only users of the pitch, there are no guys who use the pitch at the same time.

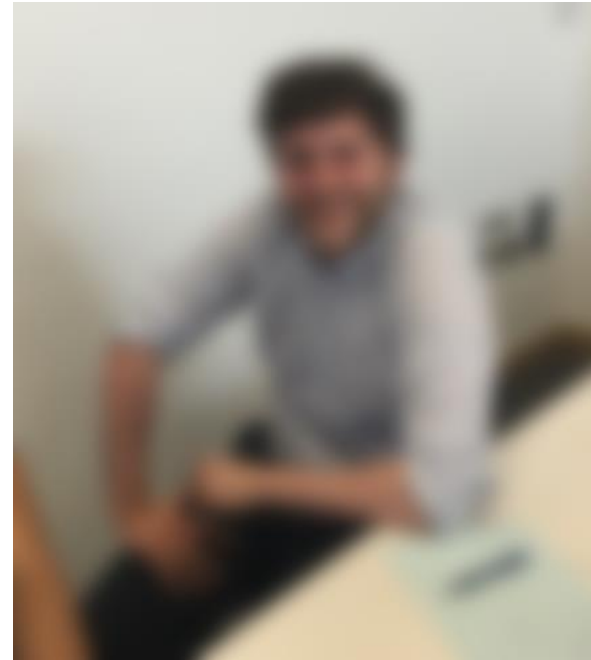


© Cathy, 32 yrs from Nottingham



I play at the leisure centre, it's a 3G pitch and away from other groups (men). I like the fact that it's really local.

For me it's the social aspect. I just love it. It's very local so I can get home quickly and go to the pub



For me, five a side has become too competitive, too well drilled. And the enjoyment for me went a long time ago

I heard about an incident at one of the leagues...after the game one of the lads went to get a knife from his car

Carl, 25yrs from Oldham

- Played throughout his life but never for major teams
- Now prefers to play 7-aside with mates
- Concerns about the more aggressive side of the game and has heard about nasty incidents
- Recreational football reminds him of getting all his mates together when he was at university – having a good laugh together and lots of beers after

“CASUAL AND CAUTIOUS”



SIZE

28%

WHAT MAKES THEM AN OPPORTUNITY?

The biggest segment in size and with a high proportion of current players (albeit in a casual form), this is a key segment to effectively serve & engage

HOW DO WE TAP INTO THIS SEGMENT?

CONVENIENCE

- Needs to be **local to them** – accessible and convenient, near to work/home
- **Weekend sessions** with accessibility for families (e/g. **parent/child sessions**) would appeal
- **Free or low cost** – must be affordable as cost of session and kit is a barrier

PITCHES/VENUE

- Focus on offering more at the more **casual and unstructured venues** (grass areas / parks)
- Create **indoor opportunities** as we know they currently play seasonally
- **Properly drained grass pitches** are important as this is where they tend to play

FACILITY ‘MUST HAVES’

- Make **vending machines / bars / cafes** available at these venues – ensuring they are **‘family friendly’**. These would also provide **additional income**
- Options where **not much / little kit required**

ENGAGEMENT

- This segment skews female so should be a **target to grow the women’s SSF game** (esp. Mum’s)
- **Educate them about SSF** and that football is not just about the 11 a side game (they may find intimidating) and that it can be more **accessible & fun**
- Include more **skills based sessions** which have less of a focus on athleticism

WATCH OUT: To help this group find the fun in small sided football

“FANS NOT FOOTBALLERS” – Segment Summary

“I love watching football and following my team, but I usually prefer to stay on my sofa and watch a match rather than get on the pitch myself! I could be tempted if it involves my team and my friends were there to kick about with”

WHAT ATTITUDES DEFINE THEM?

OVERALL ATTITUDE TO FOOTBALL



Take SSF seriously: 43% (112)

I **struggle to maintain** a regular fitness/exercise routine 59% (126)

I find **gyms/sports clubs/sports teams can be intimidating** 55% (117)

I **don't have enough spare time** to regularly play sport 53% (126)

I **watch football on TV or in person every week** during the season 95% (142)

I **follow a football team closely** and watch them as often as I can 95% (144)

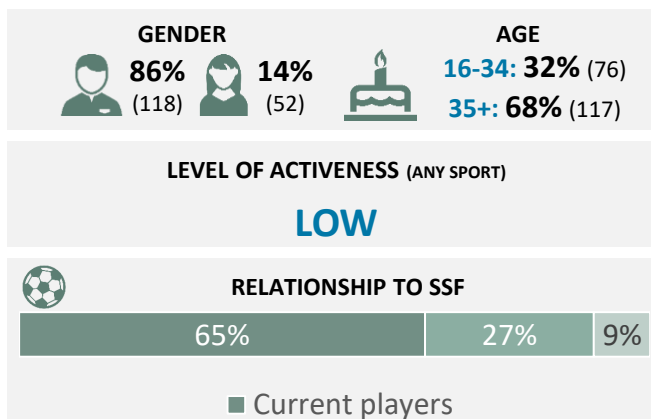
I'm a **passionate football fan**, it's a big part of who I am 87% (150)

REASONS FOR PLAYING SMALL SIDED FOOTBALL

To spend time with my friends 55% (138), to improve my fitness 54% (135), to get out of the house 34% (136), for camaraderie, socialising and banter 31% (141), to lose weight 28% (147)

WHO ARE THEY?

Skew Male and to the older age groups



WHAT DO THEIR SESSIONS LOOK LIKE?

WHERE

Top: Specialist, Leisure Centre, Park
Skews: Specialist

TYPE

Top: 5 a side and informal (no hire)
Skews: 5 a side

WHEN

Weekday 66% (125)
Weekend 24% (73)
Afternoon 26% (91)
Evening 52% (116)

WHO

Mainly Friends and overindex



WHAT WOULD MAKE THEM PLAY MORE?

If I was fitter	38% (152)
If my friends also played in a team	31% (129)
If I worked different / fewer hours	29% (132)
If it was easier to find other people to play against	22% (129)
If it was easier to find a team at my skill level	21% (162)

WHAT STOPS THEM PLAYING?

Lack of time generally	35% (140)
My age	30% (136)
Cost of hiring pitch/facilities /club membership	27% (150)
Difficulty of finding people to play with	24% (133)

“FANS NOT FOOTBALLERS” – Case Study



If you currently play:

- Please take some photos of exactly where you go to play recreational football?

If you used to play or are considering play:

- Where would you like to go to play recreational football (please take some photos)



Rich, 31yrs from Nottingham

- Football was a big part of his life as a child, played every day at school and was part of school team.
- Big Derby County fan. Season ticket holder and goes to watch as many games as he can
- Watches club football on the telly. He’s obsessed with the game and can easily watch 5 or more matches every week

We started to go to the pub to watch football rather than the park to play

Once I settled down and had kids the only football I got to see was on TV. I didn’t play at all for a few years but now play once a month with guys from work.



I just love watching the game, whether it’s at a professional level or my kids or even if I’m walking the dog in the park I’ll stop and watch people playing football

Stuart, 43yrs from Manchester

- When at school he played for the school team.
- He’s a passionate Man City Fan and a season ticket holder.
- Subscribes to BT Sport and Sky Sports. Plugged in on social media, regularly checks Football365 and comments on the forum.
- Occasionally plays 5-aside on a monthly basis with work and loves to stick around with the lads afterwards to watch a game on the pub TV

“FANS NOT FOOTBALLERS”

SIZE

25%



WHAT MAKES THEM AN OPPORTUNITY?

Massive football enthusiasts, and yet not playing anywhere near as much as they could (and potentially would like to) even though they appreciate the benefits of doing so

HOW DO WE TAP INTO THIS SEGMENT?

CONVENIENCE

- It will take a lot for this group to give it a try – don't let them fall at the first hurdle and make it **accessible and convenient for them, locally**
- **Affordability** is crucial for this group so free or low cost sessions are a must
- Most likely to drive – communicate on **car parking**

PITCHES/VENUE

- Although they have a passion for the game, this isn't currently in a playing capacity so getting them to play casually is the first step. Therefore **improved kick-about/ casual facilities (e.g. grass areas/parks)** should be a focus

FACILITY 'MUST HAVES'

- Facilities offering **televised games or the ability to watch a physical game** would work well (to appeal to their fandom)

ENGAGEMENT

- Need to offer a **dedicated SSF offer that doesn't alienate those who cite age / fitness as a barrier** (many in this group)
- First step is to offer more accessible SSF – potential target for **Walking Football and / or Futsal** for some in this group
- Include more **skills based sessions** which have less of a focus on athleticism

WATCH OUT: Might be difficult to reach them through facilities yet – first step is making it accessible and not intimidating

“INACTIVE & INDIFFERENT” – Segment Summary

“There’s a lot hype around football, it can feel intimidating. I don’t have time to keep up a fitness routine and I am reluctant to sacrifice my spare time to start one, but a friendly kick-about could be fun to join in with”

WHAT ATTITUDES DEFINE THEM?

OVERALL ATTITUDE TO FOOTBALL



Take SSF seriously: 6% (17)

I find gyms/sports teams can be **intimidating** 73% (155)

I **struggle to maintain** a regular exercise routine 70% (149)

I’m **only interested in football when England** play 38% (119)

The **hype** around the professional game **puts me off** 66% (165)

I **don’t have enough spare time** to regularly play sport 57% (136)

I **don’t see football as being suitable** for someone like me 57% (190)

REASONS FOR PLAYING SMALL SIDED FOOTBALL

To have fun 52% (104), to lose weight/ change my body image 20% (105), to spend time with friends 32% (80)

WHO ARE THEY?

Skew Female and of average age



LEVEL OF ACTIVENESS (ANY SPORT)

LOW



RELATIONSHIP TO SSF



■ Current players

WHAT DO THEIR SESSIONS LOOK LIKE?

WHERE

Top: Park
Skews: Park, School

TYPE

Top: Informal (no hire)
Skews: Informal (no hire)

WHEN

Weekday 31% (59)
Weekend 37% (112)

Afternoon 39% (133)
Evening 28% (61)

WHO

Mainly friends
Higher for:
• Family



WHAT WOULD MAKE THEM PLAY MORE?

If I was fitter	36% (144)
If I was better at football	32% (168)
Less competitive/ aggressive	17% (131)
If I knew more women that played	15% (188)

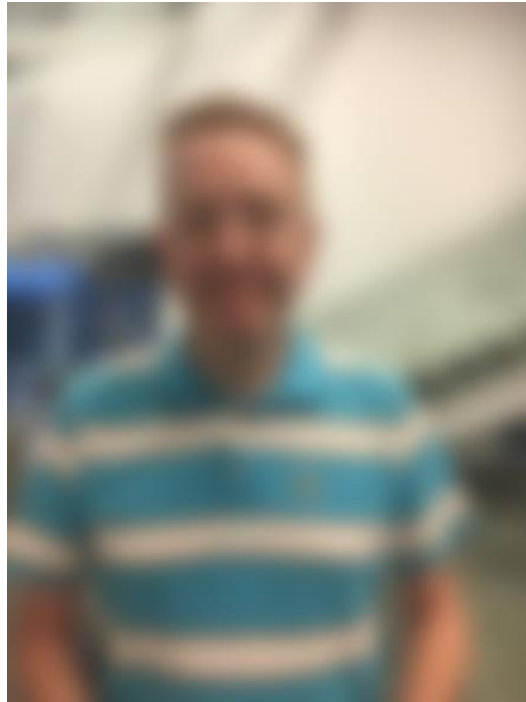
WHAT STOPS THEM PLAYING?

General lack of enjoyment of football	38% (380)
My age	37% (168)
Lack of time generally	35% (140)
My own limited skill level	30% (183)
Cliquey teams	24% (150)

“INACTIVE & INDIFFERENT” – Case Study

Adam, 39yrs from Manchester

- He used to play football when younger and through his early 20's but he's lost interest since having a family of his own
- He used to play both 5 and 7-side football. However, more recently lack of time is a major barrier and for fitness he now tends to go out for the odd occasional run
- Football is mostly now a kick around in the back garden with his children
- His work has an 11-side team but the standard is far too high to consider taking part

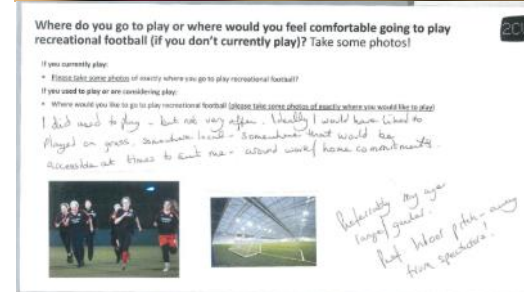
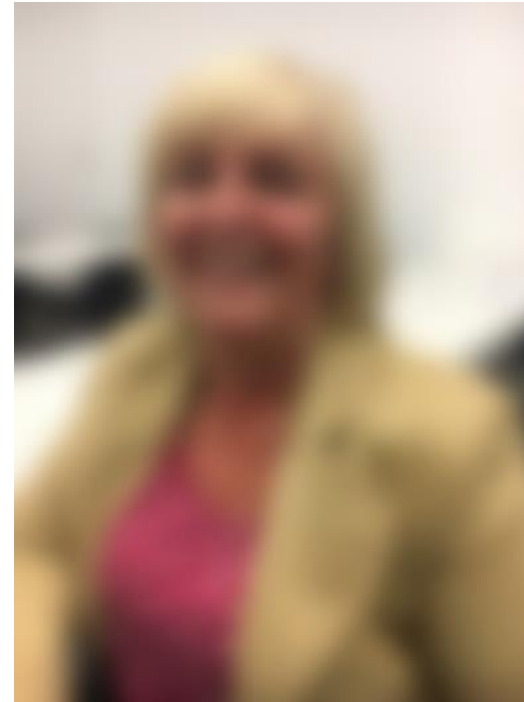


I would like a more relaxed environment to build my confidence back up

I'd like to get a team of lads together and have more of a social night out

Elaine, 47yrs from Manchester

- Grew up with a Dad, brothers, cousins who were all football mad and current partner is an ex semi-pro footballer
- She now has grown up children, 2 boys and a girl who are all in their 20's
- Played football at primary school in a mixed team (no girls team). At secondary school she got steered towards tennis, netball and rounders
- Now tends to only have a kick about with her daughter and nephews in the local park.



I have a kick about with my daughter and nephews in the park. I've had surgery recently so walking football is probably my limit!

“INACTIVE & INDIFFERENT”



SIZE

12%

WHAT MAKES THEM AN OPPORTUNITY?

Engaging this distant audience will become important in the long run, though they provide a number of challenges to overcome

HOW DO WE TAP INTO THIS SEGMENT?

CONVENIENCE

- As they struggle to maintain a regular exercise routine, offer **one off trial sessions so there is less perceived commitment** which may seem daunting
- Those that play travel the shortest time currently – **must be close to work/home**

PITCHES/VENUE

- **Non-intimidating venue best** (e.g. community centres)
- Start to target **via schools and colleges**

FACILITY ‘MUST HAVES’

- *Once playing – facilities play a role within this segment (quality goals, pitches) but **getting them engaged and motivated should be the first step***
- **Facilities offering more ‘comfort’** (pleasant showers, changing rooms and toilets) may help

ENGAGEMENT

- *Appreciating they don’t have a passion for football or exercise right now, it is important to **communicate the benefits of football overall** – e.g. **improved health / fitness***
- Sessions must be **inclusive and non- cliquy or intimidating**

WATCH OUT: More of a long term target to engage; priority is overcoming their barriers to exercise and football before facilities

The small-sided football landscape in London:

A more detailed focus on the small-sided football landscape in London (including opportunities by Borough)

Higher proportion of less engaged segments in London (vs nat rep) suggesting more informal play is taking place



Who we spoke to...

London

Age, gender, SEG matched to Nat Rep

GENDER

71% 29%

AGE

16-24: 19% 25-34: 25%
 35-44: 19% 45-54: 21%
 55+: 16%

SERIOUSNESS OF SSF

Take SSF seriously: 48% (78) T4B

RELATIONSHIP TO SSF*

53%	31%	16%
Current players (74) (155)	Lapsers (200)	

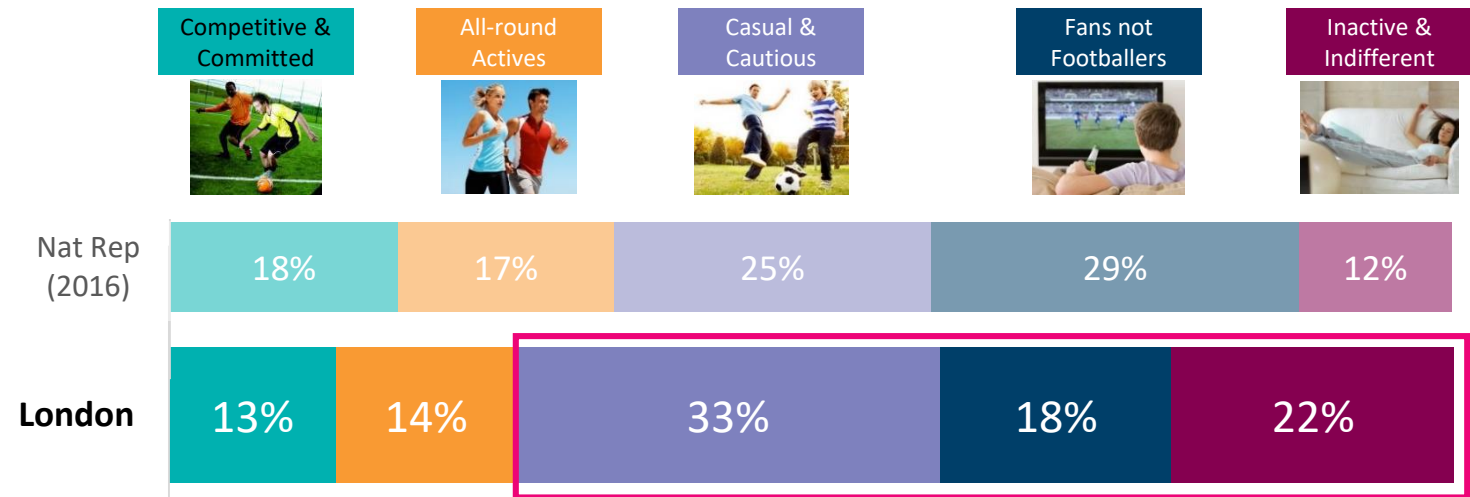
LEVEL OF ACTIVENESS (ANY SPORT)

68% (108) (T4B)

LEVEL OF FITNESS

79% (98) (T4B)

Segmentation profile | London vs Nat Rep picture



ATTITUDINAL DIFFERENCES (London vs NR)

I mainly exercise/play sport to meet or spend time with other people **-7% (T2B)**

I follow a football team closely and watch them as often as I can **-12% (T2B)**

I like to have variety when I'm exercising, trying new sports and/or training plans **-6% (T2B)**

I'm a passionate football fan, it's a big part of who I am **-10% (T2B)**

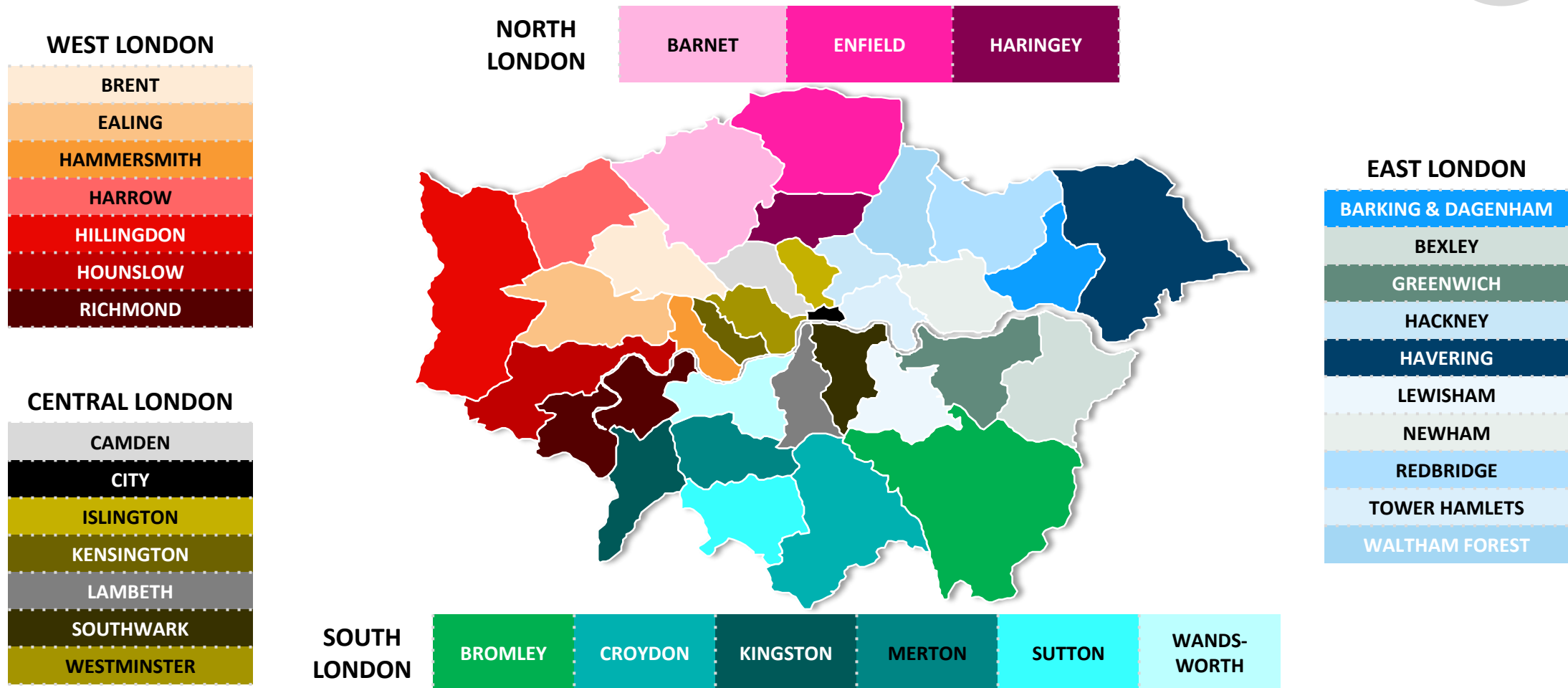
Current Players

Compared to Nat Rep, there is a higher proportion of the Casual & Cautious segment within current players, suggesting more informal play is taking place in London

Index scores in brackets (shows skew vs. average. 100 = average, 120 = higher than average, 80 = lower than average) *SSF (small sided football): organised 4/5/6/7/9-a-side, walking football, futsal and informal kickabouts. Base: All London Boroughs (3178)

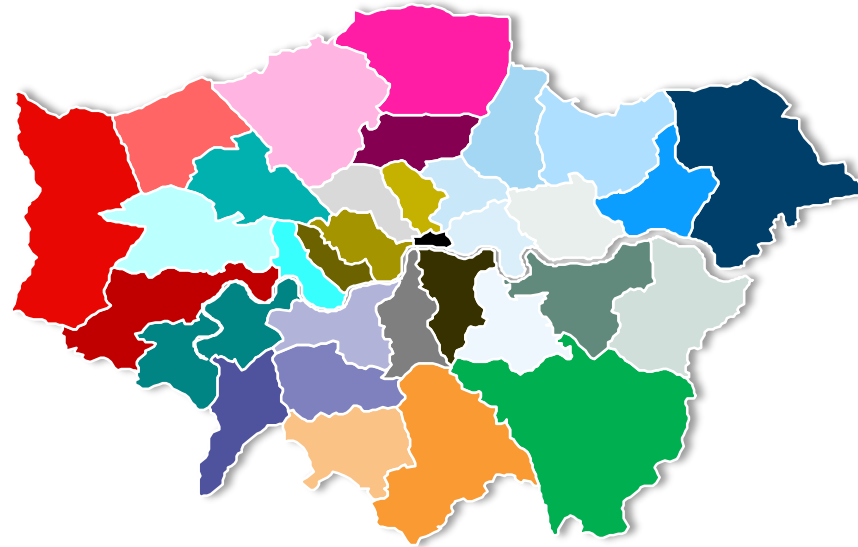
Our sample allows us to gauge the opportunity for small sided football in all of London's 32 boroughs

We've structured the sample to enable borough level analysis of the following London boroughs



Some key stats on the boroughs included in this analysis

Overview of key London borough stats



POPULATION SIZE

TOP 3	BOTTOM 3
BARNET – 383k	KENSINGTON – 156k
CROYDON – 381k	KINGSTON – 171k
EALING – 350k	HAMMERSMITH – 182k

% OF GREENSPACE (IN 2015)

TOP 3	BOTTOM 3
HAVERING – 59%	ISLINGTON – 12%
BROMLEY – 58%	KENSINGTON – 15%
RICHMOND – 51%	TOWER HAMLETS – 15%

HOUSEHOLD INCOME (£ median)

TOP 3	BOTTOM 3
KENSINGTON – 116k	BARKING – 34k
WESTMINSTER – 81k	NEWHAM – 34k
RICHMOND – 77k	WALTHAM – 39k

CRIME RATE (per 1000)

TOP 3 (Most crime)	BOTTOM 3 (Least crime)
WESTMINSTER – 212	HARROW – 50
CAMDEN – 124	BEXLEY – 52
ISLINGTON – 121	SUTTON – 56

% OF POP BAME

TOP 3	BOTTOM 3
NEWHAM – 72%	HAVERING – 14%
BRENT – 65%	RICHMOND – 15%
REDBRIDGE – 61%	BROMLEY – 17%

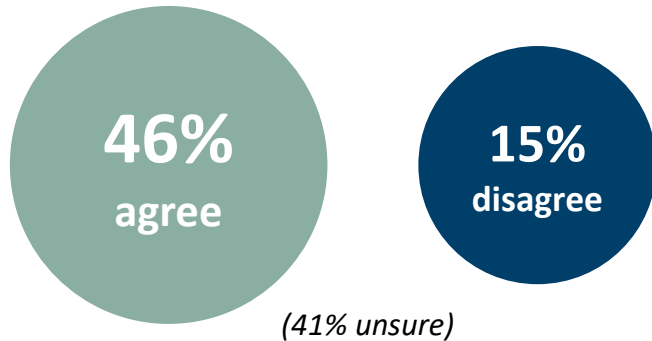
Source: GLA Intelligence: Borough Profiles - NOTE ANALYSIS EXCLUDES 'CITY' DUE TO SMALL POP SIZE (8000)

Half of Londoners think it is possible to find a SSF venue when needed. Those in some of the more central Boroughs (e.g. Greenwich, Hammersmith) claim to have fewer parks to play in

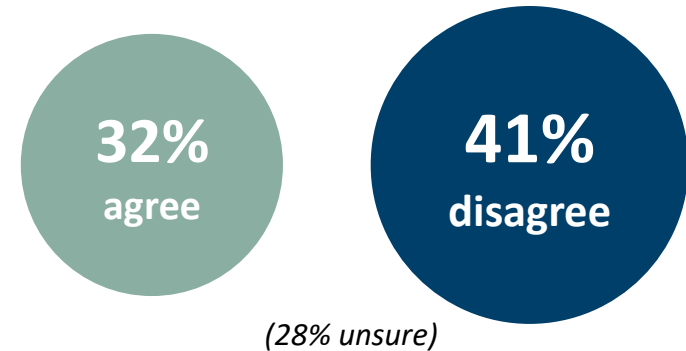
SSF access perceptions | London



“At the times I want to play SSF, it is possible to find a venue near me”



“There aren't many parks/open spaces to play SSF in my area”



MORE LIKELY TO 'AGREE'

Newham	61%
Barking & Dagenham	59%
Waltham Forest	55%
Redbridge	54%

MORE LIKELY TO 'DISAGREE'

Hammersmith	23%
Hackney	22%
Ealing	21%
Bexley	20%
Sutton	20%

MORE LIKELY TO 'AGREE'

Greenwich	48%
Hammersmith	45%
Camden	42%
Brent	41%
Kensington	41%
Tower Hamlets	41%

MORE LIKELY TO 'DISAGREE'

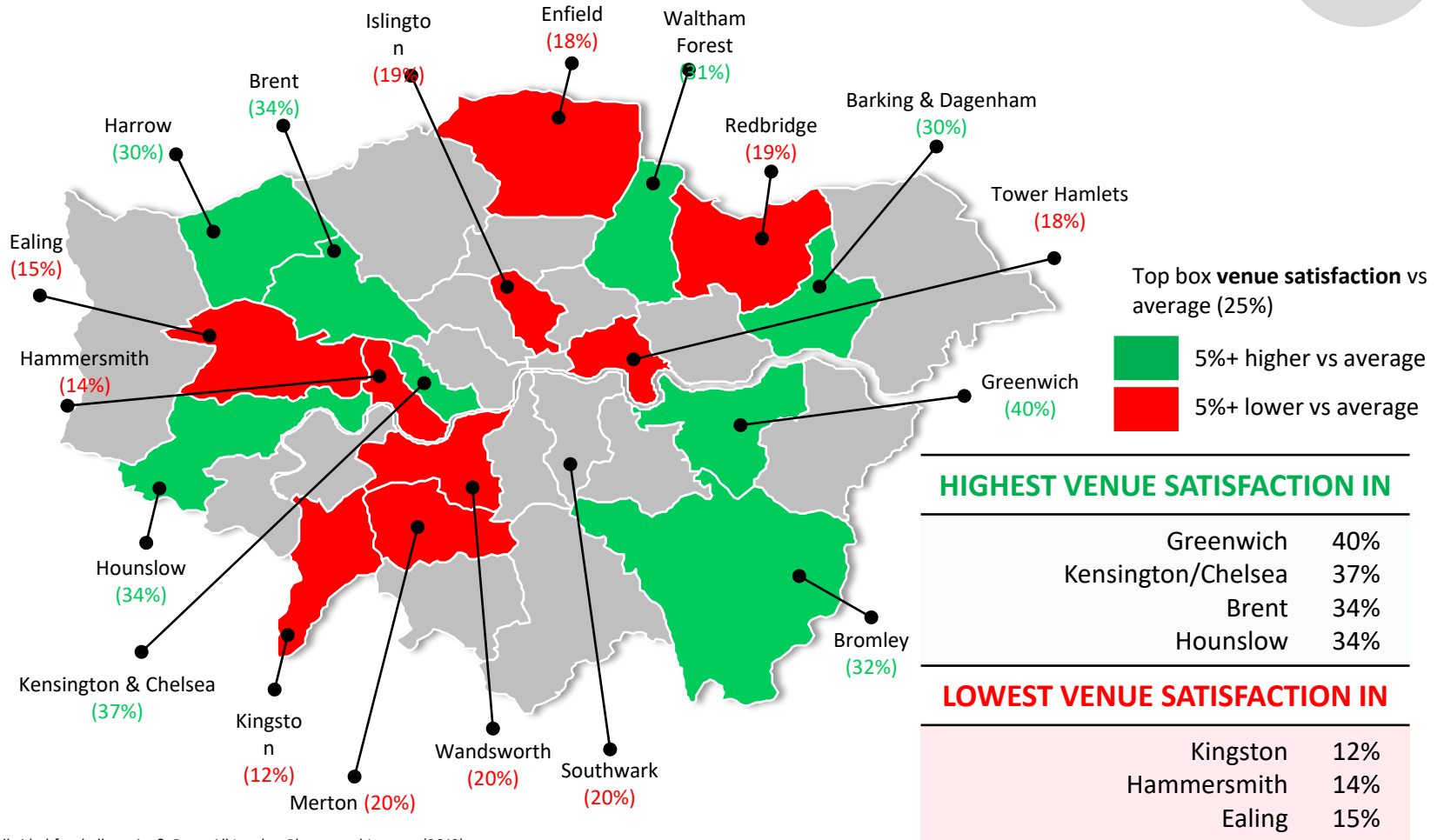
Richmond	57%
Merton	56%
Bromley	55%
Sutton	54%

NQ16. Perception of SSF in local area Base: London All Boroughs total (3178)

Top box venue satisfaction scores are wide ranging across the London boroughs



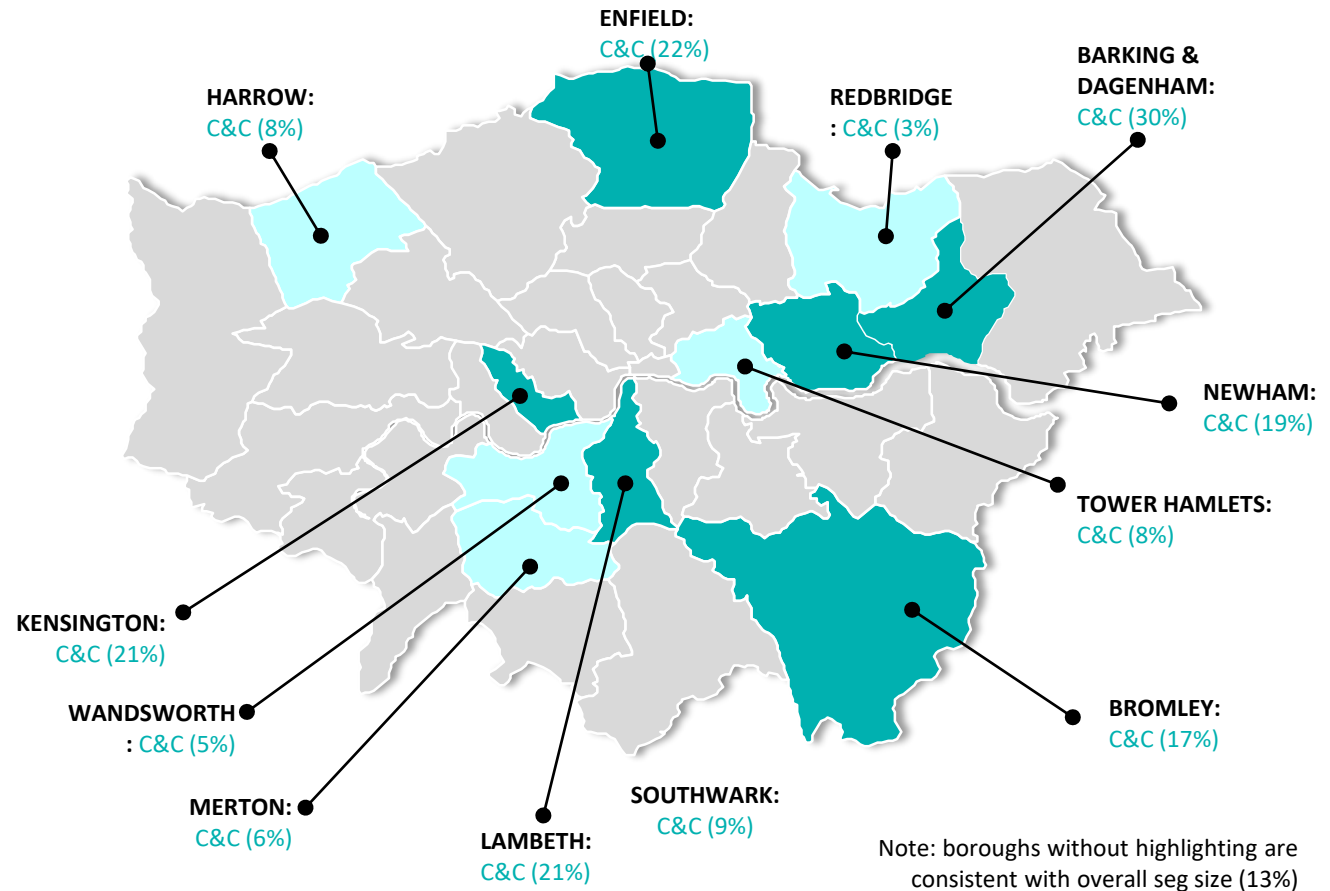
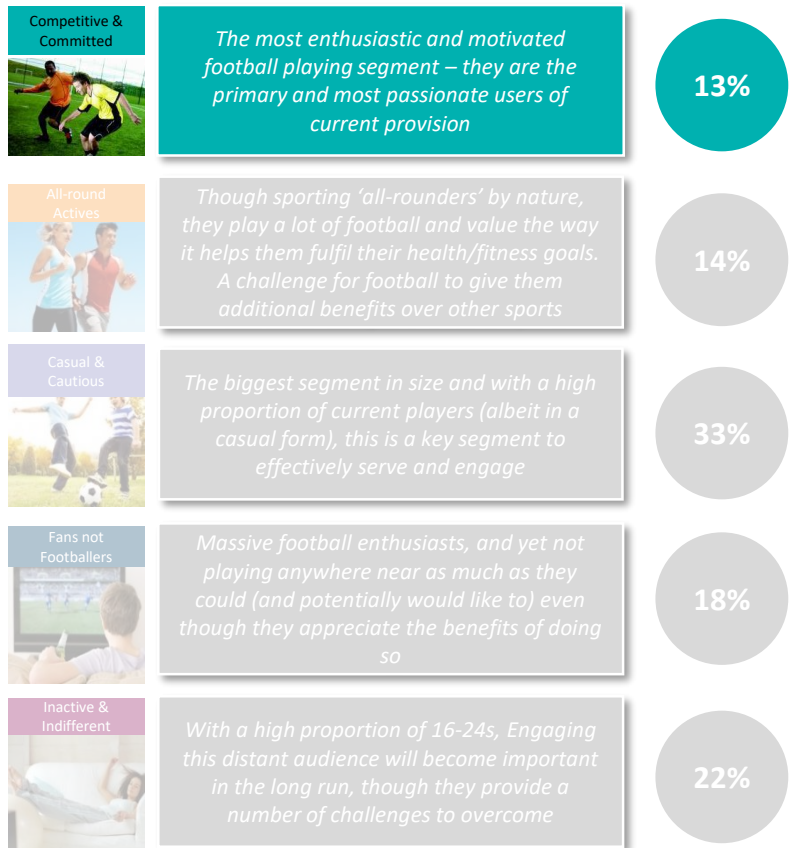
Top box venue satisfaction by London borough (based on last SSF session played)



NQ28. How satisfied were you with the venue you used for last small sided football session? Base: All London Players and Lapsers (2642)

Our most engaged segment are most prevalent in North and East London, with Lambeth also over-indexing for this segment

How does **Competitive & Committed** distribution differ by Borough?



Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

All-Round Actives are most likely to be found in Redbridge and Wandsworth, under-indexing in West London, Kingston and Croydon



London

How does **All-Round Actives** distribution differ by Borough?

<p>Competitive & Committed</p>	<p>The most enthusiastic and motivated football playing segment – they are the primary and most passionate users of current provision</p>
<p>All-round Actives</p>	<p>Though sporting ‘all-rounders’ by nature, they play a lot of football and value the way it helps them fulfil their health/fitness goals. A challenge for football to give them additional benefits over other sports</p>
<p>Casual & Cautious</p>	<p>The biggest segment in size and with a high proportion of current players (albeit in a casual form), this is a key segment to effectively serve and engage</p>
<p>Fans not Footballers</p>	<p>Massive football enthusiasts, and yet not playing anywhere near as much as they could (and potentially would like to) even though they appreciate the benefits of doing so</p>
<p>Inactive & Indifferent</p>	<p>With a high proportion of 16-24s, Engaging this distant audience will become important in the long run, though they provide a number of challenges to overcome</p>

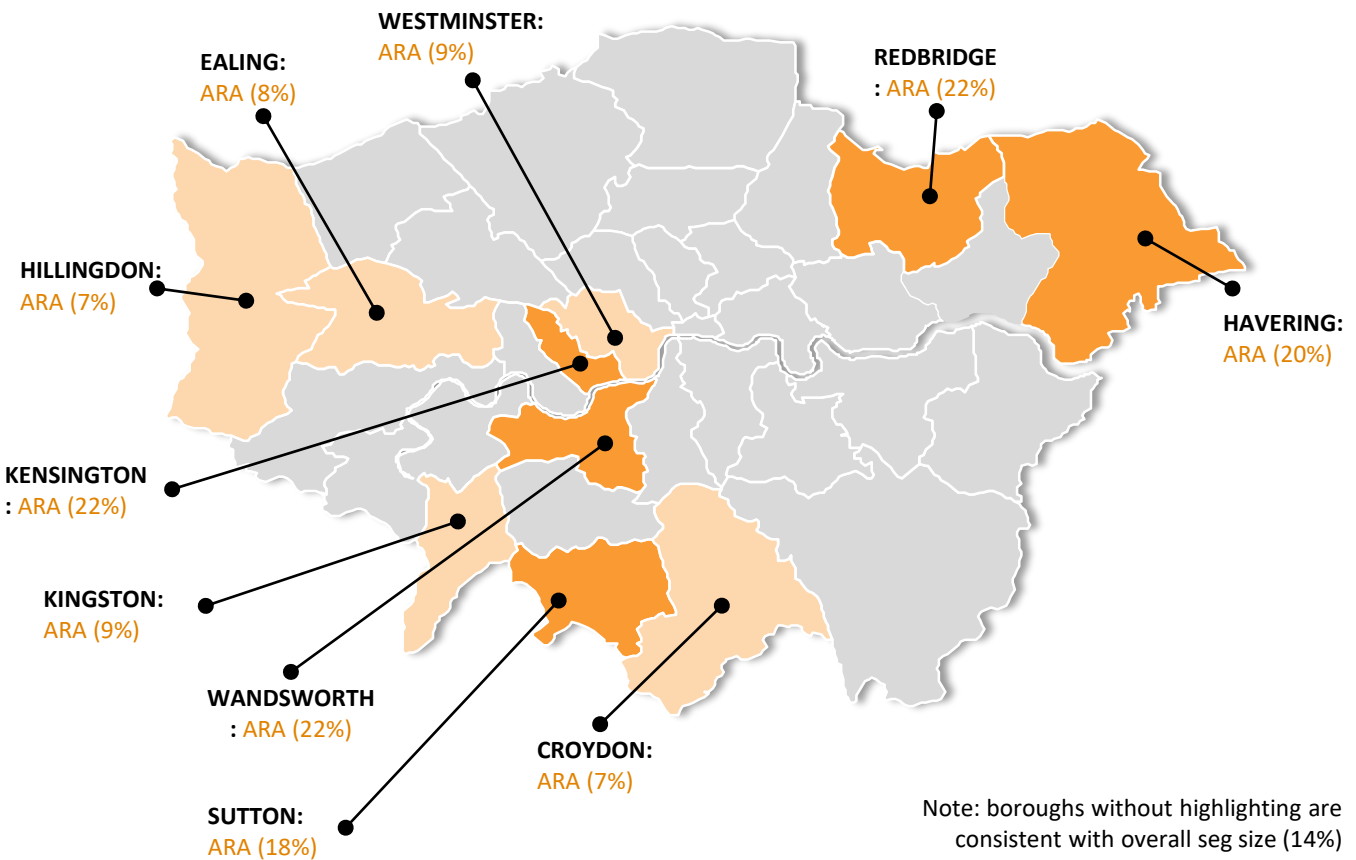
13%

14%

33%

18%

22%



Note: boroughs without highlighting are consistent with overall seg size (14%)

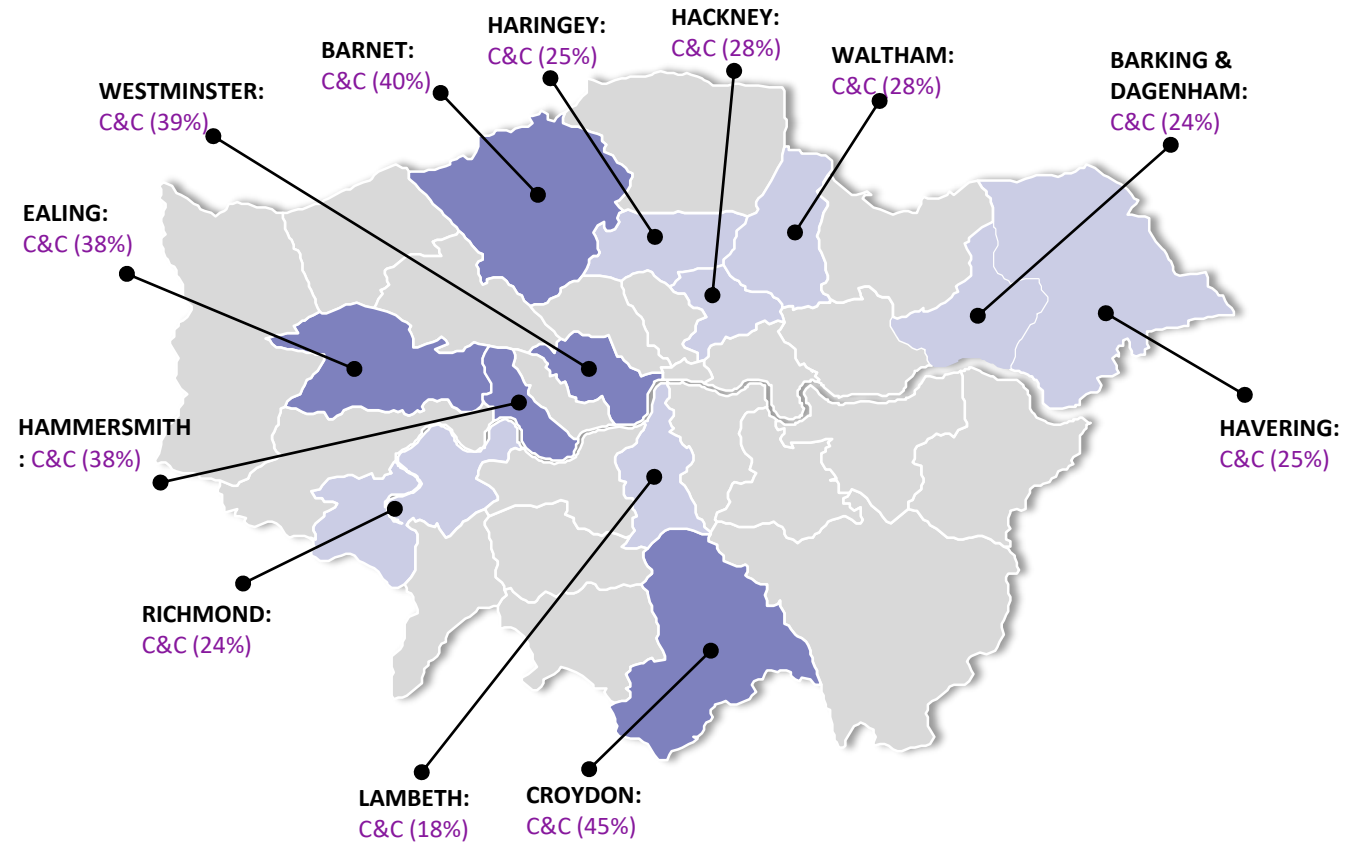
Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Our largest segment can be found across London, though are especially prominent in the suburban boroughs of Croydon, Barnet and Ealing



How does **Casual & Cautious** distribution differ by Borough?

<p>Competitive & Committed</p>	<p>The most enthusiastic and motivated football playing segment – they are the primary and most passionate users of current provision</p>	<p>13%</p>
<p>All-round Actives</p>	<p>Though sporting 'all-rounders' by nature, they play a lot of football and value the way it helps them fulfil their health/fitness goals. A challenge for football to give them additional benefits over other sports</p>	<p>14%</p>
<p>Casual & Cautious</p>	<p>The biggest segment in size and with a high proportion of current players (albeit in a casual form), this is a key segment to effectively serve and engage</p>	<p>33%</p>
<p>Fans not Footballers</p>	<p>Massive football enthusiasts, and yet not playing anywhere near as much as they could (and potentially would like to) even though they appreciate the benefits of doing so</p>	<p>18%</p>
<p>Inactive & Indifferent</p>	<p>With a high proportion of 16-24s, Engaging this distant audience will become important in the long run, though they provide a number of challenges to overcome</p>	<p>22%</p>



Note: boroughs without highlighting are consistent with overall seg size (33%)

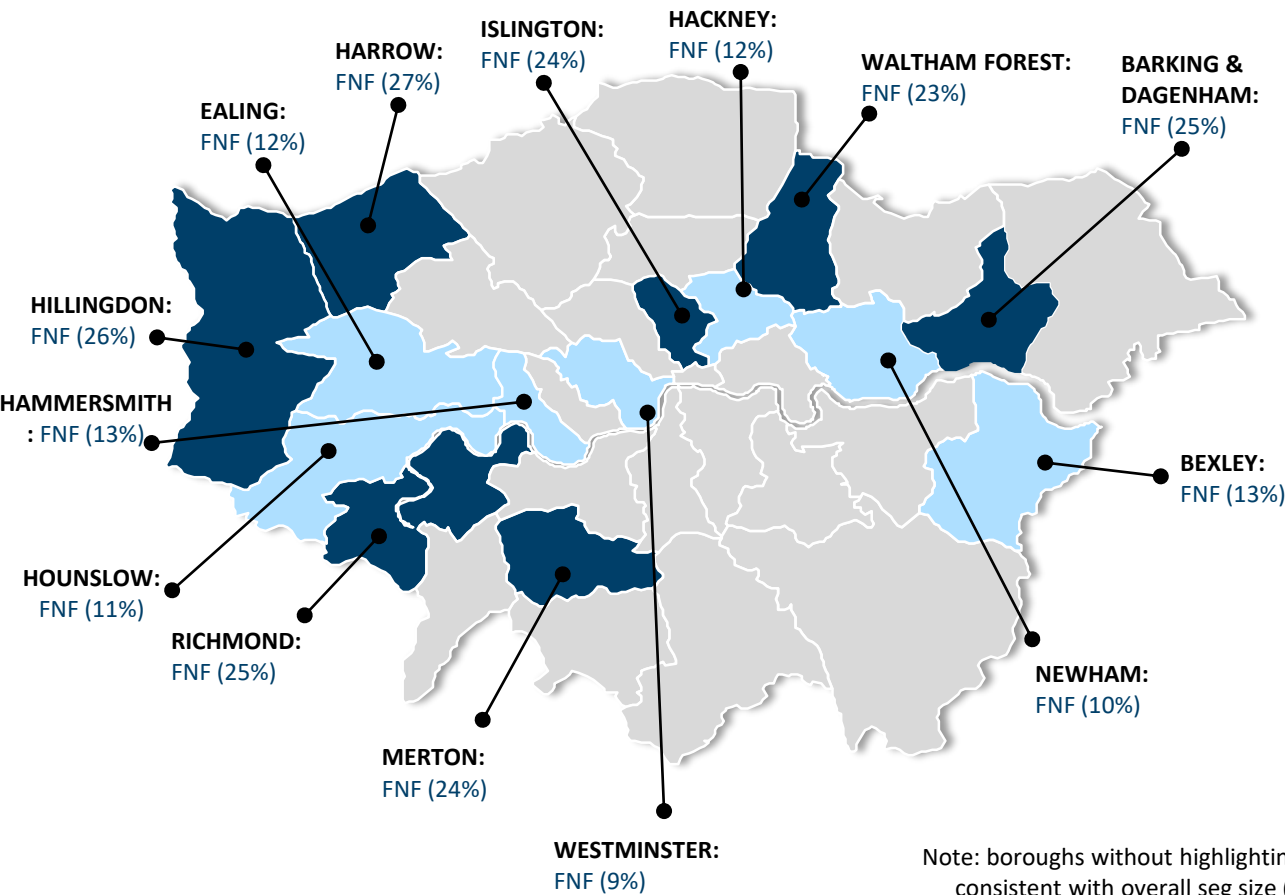
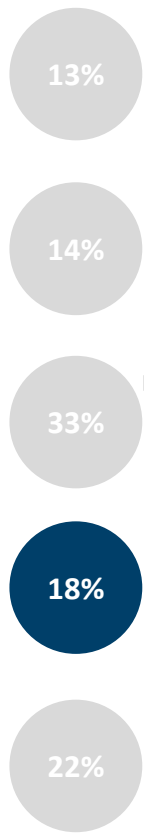
Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Fans Not Footballers are prevalent in parts of West London as well as Islington and Barking – a particular opportunity given their football fandom



How does **Fans Not Footballers** distribution differ by Borough?

<p>Competitive & Committed</p>	<p>The most enthusiastic and motivated football playing segment – they are the primary and most passionate users of current provision</p>
<p>All-round Actives</p>	<p>Though sporting ‘all-rounders’ by nature, they play a lot of football and value the way it helps them fulfil their health/fitness goals. A challenge for football to give them additional benefits over other sports</p>
<p>Casual & Cautious</p>	<p>The biggest segment in size and with a high proportion of current players (albeit in a casual form), this is a key segment to effectively serve and engage</p>
<p>Fans not Footballers</p>	<p>Massive football enthusiasts, and yet not playing anywhere near as much as they could (and potentially would like to) even though they appreciate the benefits of doing so</p>
<p>Inactive & Indifferent</p>	<p>With a high proportion of 16-24s, Engaging this distant audience will become important in the long run, though they provide a number of challenges to overcome</p>



Note: boroughs without highlighting are consistent with overall seg size (18%)

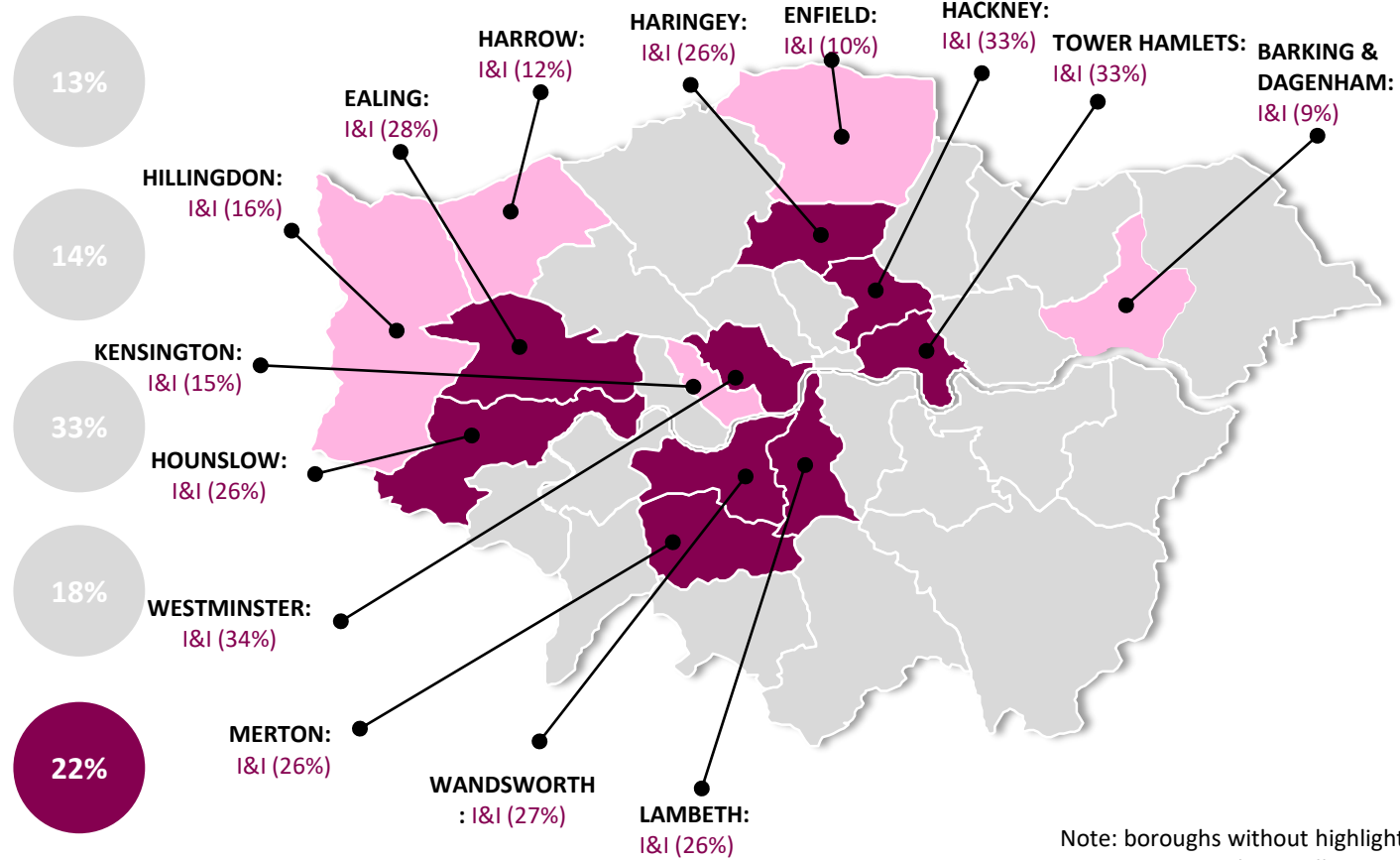
Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Our least engaged segment are most concentrated in South West and West London



Does **Inactive & Indifferent** distribution differ by Borough?

<p>Competitive & Committed</p>	<p>The most enthusiastic and motivated football playing segment – they are the primary and most passionate users of current provision</p>
<p>All-round Actives</p>	<p>Though sporting ‘all-rounders’ by nature, they play a lot of football and value the way it helps them fulfil their health/fitness goals. A challenge for football to give them additional benefits over other sports</p>
<p>Casual & Cautious</p>	<p>The biggest segment in size and with a high proportion of current players (albeit in a casual form), this is a key segment to effectively serve and engage</p>
<p>Fans not Footballers</p>	<p>Massive football enthusiasts, and yet not playing anywhere near as much as they could (and potentially would like to) even though they appreciate the benefits of doing so</p>
<p>Inactive & Indifferent</p>	<p>With a high proportion of 16-24s, Engaging this distant audience will become important in the long run, though they provide a number of challenges to overcome</p>



Note: boroughs without highlighting are consistent with overall seg size (22%)

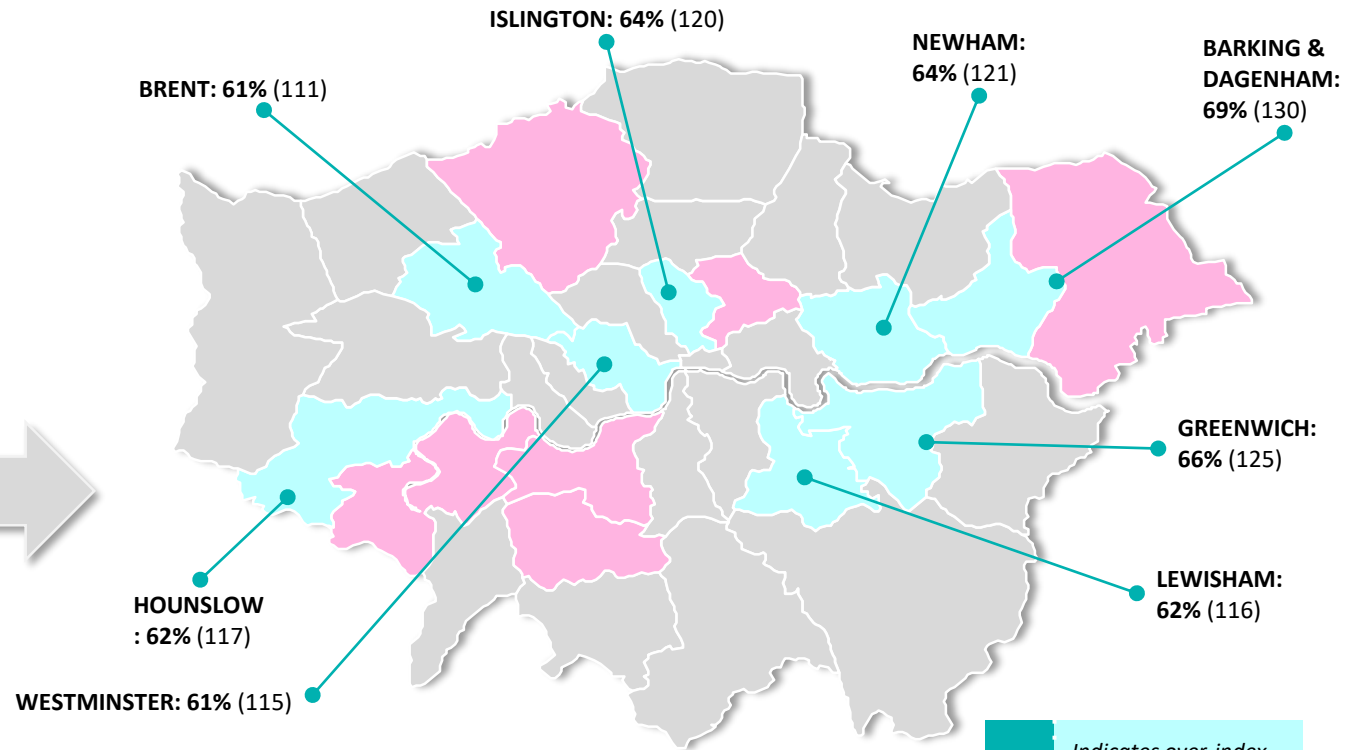
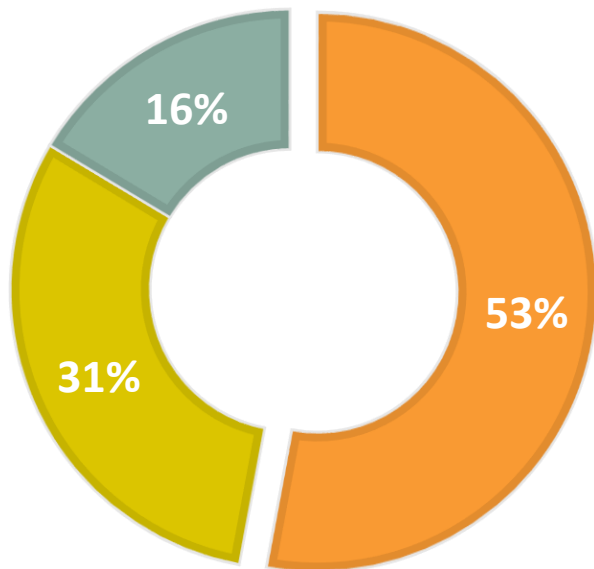
Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

There is a high concentration of players in Barking, Islington, Newham, Brent and Lewisham; players are under-represented in South West London



Which boroughs have the highest proportion of current small sided football players?

■ *Player* ■ *Lapser* ■ *Non player (considerer)*



■ Indicates over-index
■ Indicates under-index

Under indexes in...						
Wandsworth 45%	Hammersmith 45%	Havering 44%	Hackney 42%	Barnet 39%	Merton 32%	Richmond 29%

SQ6/7: How often do you participate in each of the following types of football? / Which of the following types of football would you consider playing in the future? Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Venue awareness is dominated by local parks and leisure centres in London; aside from Kingston, Bexley and Greenwich, dedicated facilities are less top of mind



What venues are they aware of in London?

DEDICATED FOOTBALL FACILITY



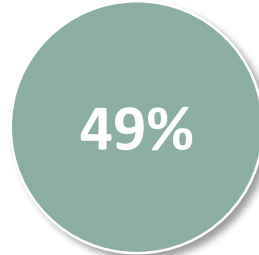
HIGHER AWARENESS IN

Bexley	44%
Kingston	43%
Greenwich	38%
Kensington	36%

LOWER AWARENESS IN

Merton	16%
Ealing	21%
Redbridge/ Wandsworth	22%
Enfield	23%

LEISURE / FITNESS / SPORT CENTRE



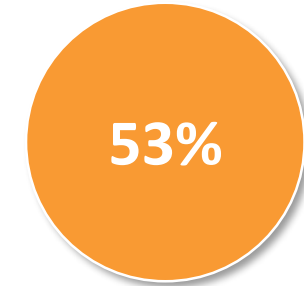
HIGHER AWARENESS IN

Newham	67%
Barking / Greenwich	64%
Hillingdon	59%

LOWER AWARENESS IN

Hammersmith / Merton	36%
Lambeth	38%
Westminster	39%
Hounslow	40%

LOCAL PARK OR RECREATION GROUND



HIGHER AWARENESS IN

Haringey	64%
Richmond	63%
Ealing / Newham	61%
Barnet / Greenwich / Waltham	59%

LOWER AWARENESS IN

Hounslow / Merton	42%
Westminster	43%
Enfield / Brent / Hammersmith	45%
Harvering	46%

U2: Which of the following types of venue are available for playing small sided football where you live / work? Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

The appetite for playing at dedicated facilities is strongest in the North and East of London, especially in Haringey and Havering

What kind of facilities do people want to play at?



DEDICATED FOOTBALL FACILITY

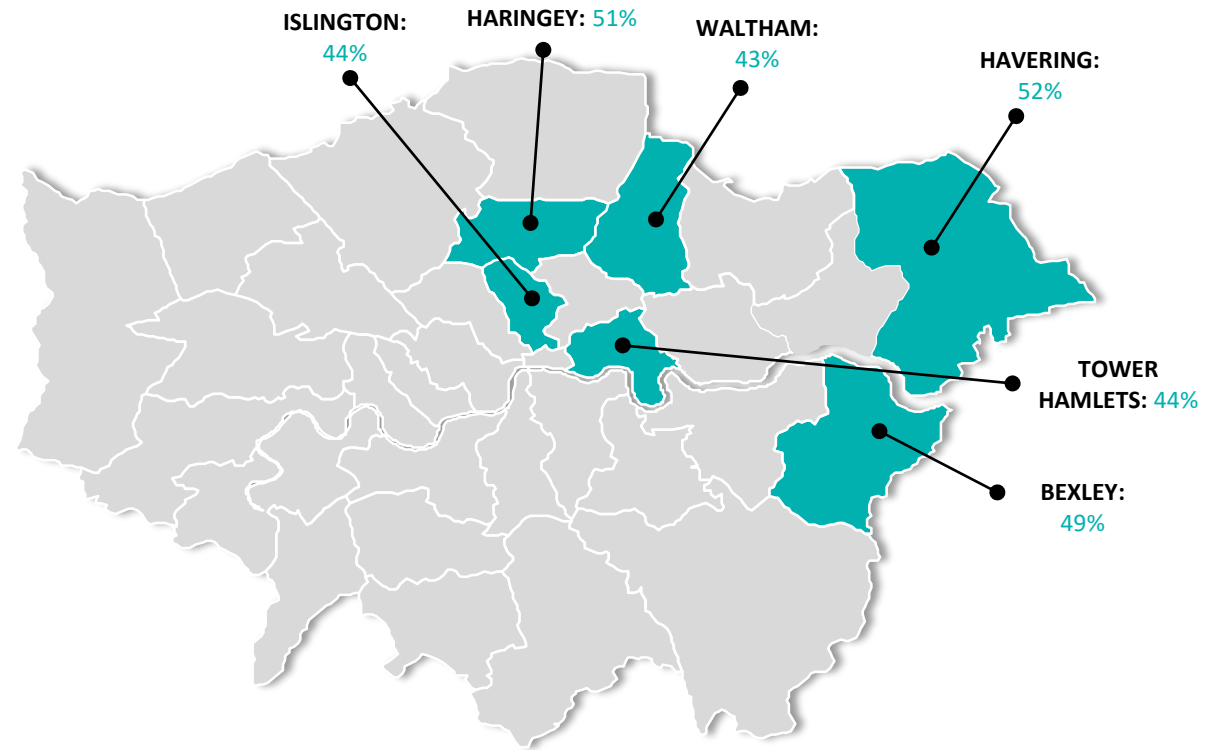


Lowest in Newham (28%), Enfield (28%) and Camden (30%)

LEISURE / FITNESS / SPORT CENTRE



LOCAL PARK OR RECREATION GROUND

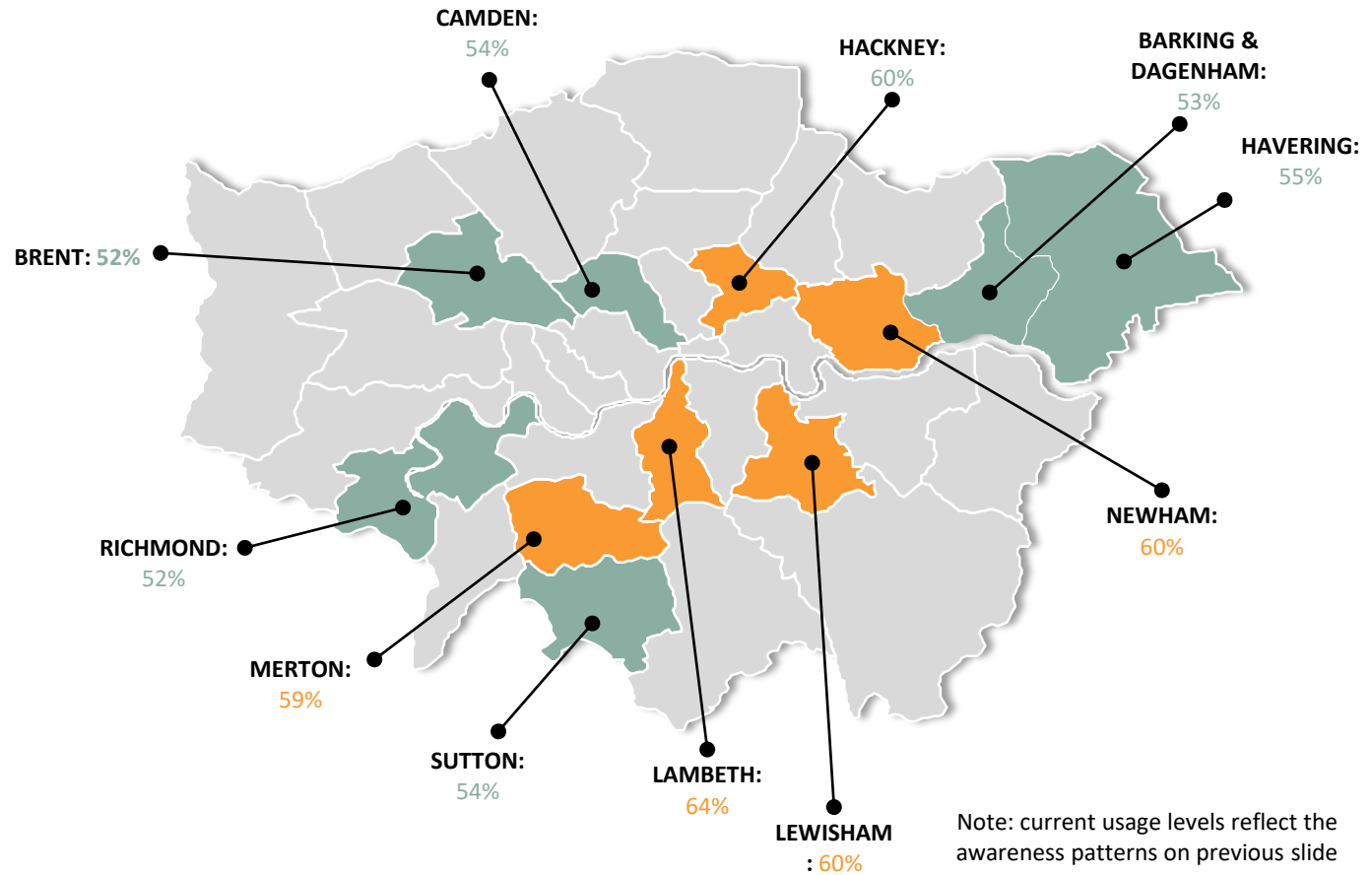
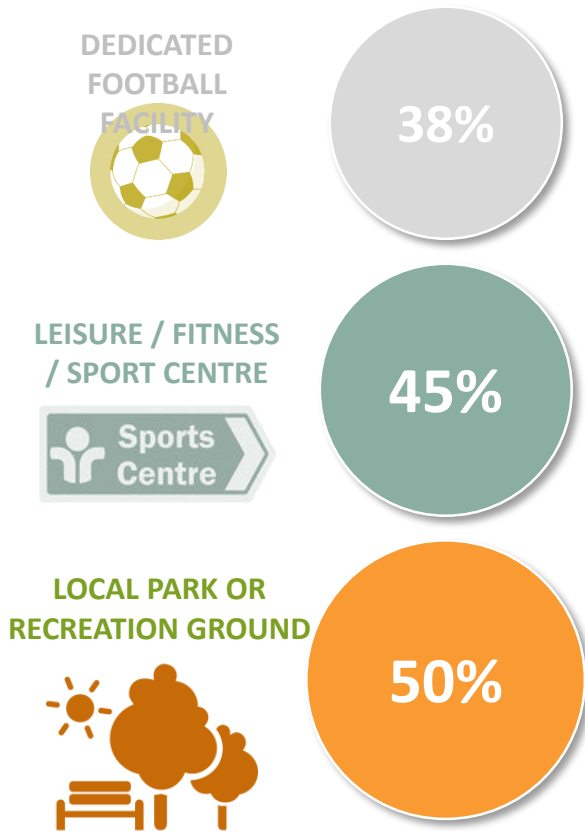


Note: current usage levels reflect the awareness patterns on previous slide

13: Which of the following venues would you want to play at? Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Preference for play at local parks is especially high in central London boroughs, with leisure centres typically more popular in outer boroughs

What kind of facilities do people want to play at?



Note: current usage levels reflect the awareness patterns on previous slide

13: Which of the following venues would you want to play at? Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

And 4 other boroughs stand out as prime opportunities for a more park based approach, raising awareness / re-packaging what's already available



Which boroughs might be more receptive to initiatives focused around local parks / recreation grounds?



LEWISHAM

What makes it an opportunity?

2nd Highest interest in park based SSF;
Over-index of current players and C&C segment; lower awareness of local park options

POPULATION SIZE (est.) **294,100**

Largest segment

CASUAL & CAUTIOUS

% of Comp & Committed (core ssf segment)

13%

Awareness of local parks / recreation grounds

52%
Rank 17/32

Interest in playing SSF at local parks / recreation grounds

60%
Rank 2/32



HACKNEY

What makes it an opportunity?

High interest in park based SSF options but comparatively low awareness; high proportion of lapsed players (38%) in area

POPULATION SIZE (est.) **265,300**

Largest segment

INACTIVE & INDIFFERENT

% of Comp & Committed (core ssf segment)

10%

Awareness of local parks / recreation grounds

50%
Rank 20/32

Interest in playing SSF at local parks / recreation grounds

60%
Rank 4/32



WANDSWORTH

What makes it an opportunity?

6th highest interest in park based SSF;
Large base of lapsed players (42%) to re-engage;
Lots of green spaces to utilize;

POPULATION SIZE (est.) **318,000**

Largest segment

CASUAL & CAUTIOUS

% of Comp & Committed (core ssf segment)

5%

Awareness of local parks / recreation grounds

56%
Rank 11/32

Interest in playing SSF at local parks / recreation grounds

55%
Rank 6/32



ENFIELD

What makes it an opportunity?

Over-index of core playing segments;
High interest in park based SSF;
Large pop size to tap into;

POPULATION SIZE (est.) **329,000**

Largest segment

CASUAL & CAUTIOUS

% of Comp & Committed (core ssf segment)

22%

Awareness of local parks / recreation grounds

45%
Rank 28/32

Interest in playing SSF at local parks / recreation grounds

55%
Rank 7/32

Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

We've identified 4 boroughs that demonstrate a clear appetite for new specialist facilities



Which boroughs offer most opportunity for a dedicated small sided football facility?



HARINGEY

What makes it an opportunity?

2nd highest interest in dedicated SSF facility with high proportion of lapsed / Casual & Cautious available to re-engage (growth opportunity); Opp. for affiliation / activation with Tottenham

POPULATION SIZE (est.)	271,000
Largest segment	CASUAL & CAUTIOUS INACTIVE & INDIFFERENT
% of Comp & Committed (core SSF segment)	13%
Awareness of dedicated SSF facilities	32% Rank 9/32
Interest in dedicated SSF facilities	51% Rank 2/32



HAVERING

What makes it an opportunity?

Most interested in specialist facilities yet 'my local pitch' search shows limited high spec options in borough; high proportion of lapsed players, and opportunity segments (C&Cs, FNFs) to target

POPULATION SIZE (est.)	247,700
Largest segment	CASUAL & CAUTIOUS
% of Comp & Committed (core SSF segment)	9%
Awareness of dedicated SSF facilities	34% Rank 5/32
Interest in dedicated SSF facilities	52% Rank 1/32



BEXLEY

What makes it an opportunity?

High interest yet limited availability of 3G small sided options in area; Sizeable contingent of current and prospective players offering immediate and longer term opportunity

POPULATION SIZE (est.)	240,600
Largest segment	CASUAL & CAUTIOUS
% of Comp & Committed (core SSF segment)	14%
Awareness of dedicated SSF facilities	44% Rank 1/32
Interest in dedicated SSF facilities	49% Rank 3/32



MERTON

What makes it an opportunity?

Lowest awareness, yet high interest in specialist SSF facilities. High proportion of lapsed players and FNFs give definite opportunity for impacting SSF participation rates

POPULATION SIZE (est.)	208,500
Largest segment	CASUAL & CAUTIOUS
% of Comp & Committed (core SSF segment)	6%
Awareness of dedicated SSF facilities	16% Rank 32/32
Interest in dedicated SSF facilities	43% Rank 7/32

Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Across these opportunity boroughs, there is an openness to artificial surfaces; session type shows greater variance, though session length is largely consistent



What would a new facility need to offer in this area?



HARINGEY



HAVING



BEXLEY



MERTON

SURFACE(S):
Strong preference for natural and artificial grass options (3G experience very limited)

TYPE OF SESSION:
Over-index for 7 a side, and turn up and play options; low interest in Walking Football and Futsal

SESSION LENGTH:
Preference for 45-50 min sessions

SURFACE(S):
High interest in outdoor 3G pitch options

TYPE OF SESSION:
Massive over-index for 5 a side with appetite also evident for Walking Football and turn up and play

SESSION LENGTH:
Preference for shorter 40 min sessions

SURFACE(S):
Preference for Natural grass though amenable to artificial options (indoor or outdoor)

TYPE OF SESSION:
Notable over-index for Walking Football options (3rd most popular session), turn up and play and 5 a side

SESSION LENGTH:
45-50 min sessions

SURFACE(S):
Amenable to all surface types though less interested in tarmac and polymeric surfaces

TYPE OF SESSION:
Under-index for 5-a-side, more interested in turn up and play / family friendly options

SESSION LENGTH:
Ideally 40 mins

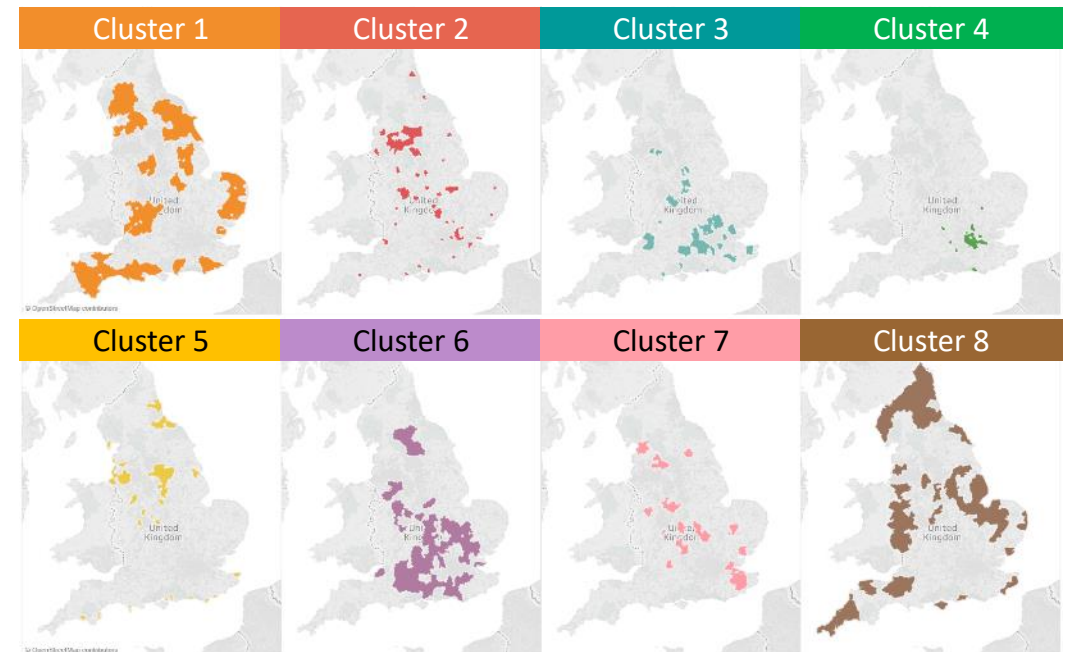
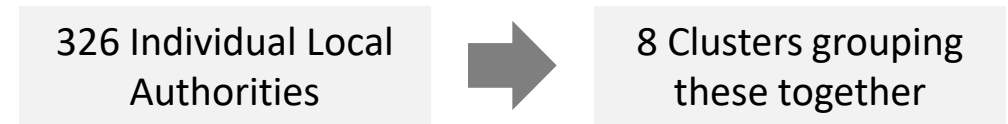
Base: London total sample (3178) – quotas set to achieve c. N=100 per borough

Cluster Analysis:

Looking at the segment fall out within clusters of Local Authorities

The Regional Clusters

- With 326 local authorities in the UK, we needed an efficient approach to sampling
- The FA analysed all the available demographic information in each of the 326 Local authorities in England to identify which local authorities were similar to each other in order to group them together. Using statistical techniques, the clusters were grouped based on similarities observed in:
 - Age
 - Ethnicity
 - Marital status / Life stage
 - Urban/Rural
 - Population Density
 - Social Grade
- 8 Regional clusters were identified grouping similar Local Authorities – these are the groups we have focussed our research on
- The distribution of small sided football segments across each Local Authority can be assumed by looking at the segment fall out within each of the Clusters



How to use the cluster analysis

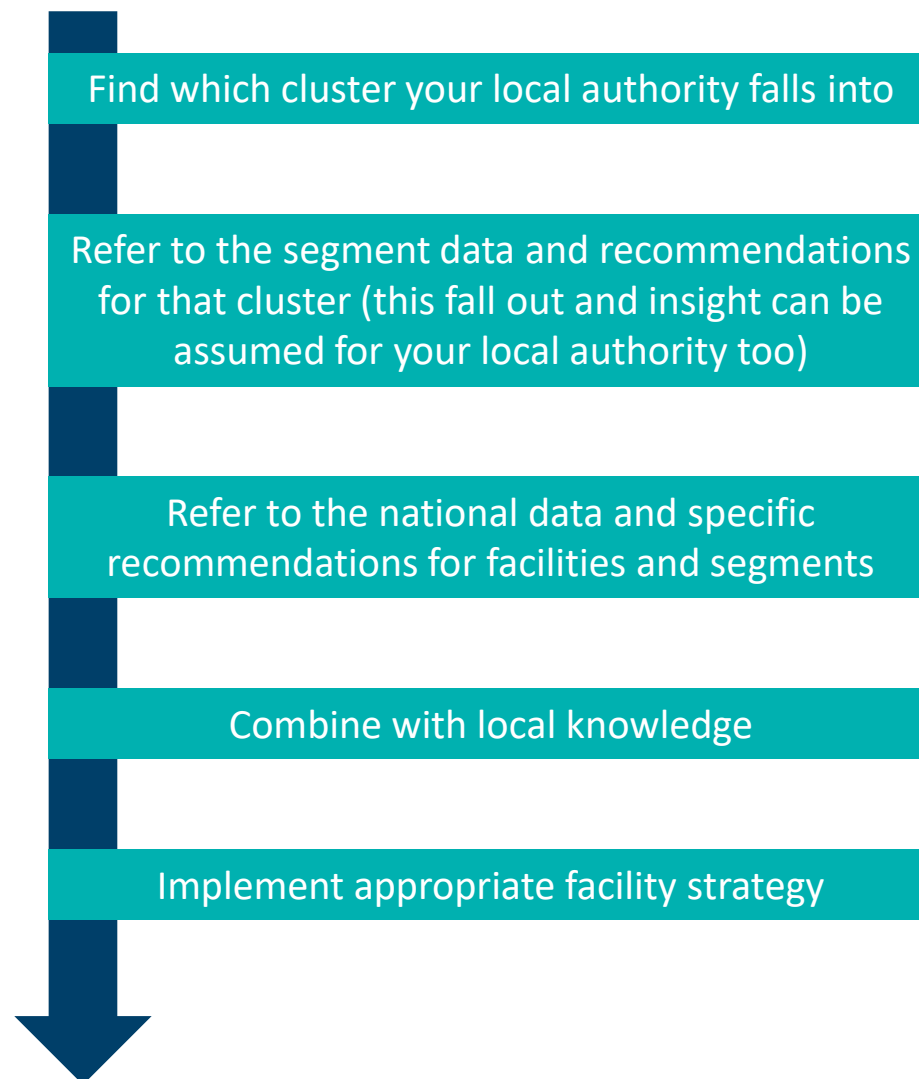
- The clusters are designed to be representative of the local authorities that fall into them, therefore the segment fall out of a local authority can be assumed based on the fall out observed within the cluster that Local Authority falls within
- This information would then inform the facility strategy for that Local Authority

For example :

The 'Babergh' Local Authority is in Cluster 1. Therefore if you are looking at the facility strategy for Babergh, you would refer to the recommendations based on the segment fall out for Cluster 1

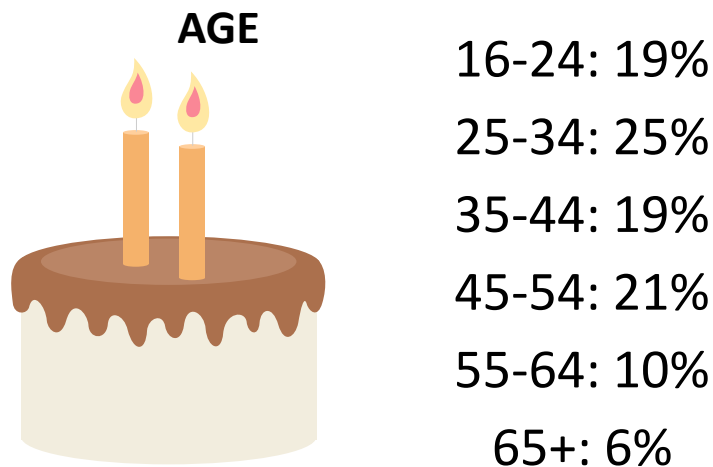
To understand more specifically how to target the segments referenced here, refer to the national data which covers the segments themselves in more detail and use this to develop your strategy.

- Always combine with local knowledge of any specific local authority and what is feasible and appropriate based on this



Our Clusters are representative of the small sided football audience

- Quotas were set on age and gender per cluster to be representative of the small sided football audience (players/lapsers/considerers)
- These are the proportions identified from the sizing study we completed ahead of the original nationally representative segmentation study in 2016



- However, we know that certain Clusters skew to different age groups, by definition. Therefore we have weighted the data to these proportions, while still taking into account the SSF age breakdown

Cluster age definition (by definition)

Segment	Nat Rep	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7	Cluster 8
16 to 24	14%	11%	18%	14%	16%	14%	12%	15%	12%
25 to 34	17%	11%	20%	15%	24%	14%	13%	16%	13%
35 to 44	16%	15%	17%	18%	19%	17%	18%	18%	16%
45 to 54	17%	18%	16%	18%	16%	18%	19%	17%	17%
55 to 64	14%	18%	12%	15%	11%	15%	16%	15%	17%
65+	22%	28%	17%	21%	14%	22%	23%	19%	25%

Indexes vs. Nat Rep calculated and multiplied by the SSF audience

SSF audience multiplied by indexed proportions

Age	SSF Audience	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7	Cluster 8
16 to 24	19%	16%	23%	19%	20%	19%	17%	20%	17%
25 to 34	25%	18%	27%	22%	32%	21%	20%	23%	20%
35 to 44	19%	19%	19%	21%	20%	20%	22%	21%	20%
45 to 54	21%	24%	18%	22%	18%	23%	24%	21%	22%
55 to 64	10%	14%	8%	11%	7%	11%	12%	10%	13%
65+	6%	8%	4%	6%	3%	6%	6%	5%	7%

Local Authorities included within each Cluster

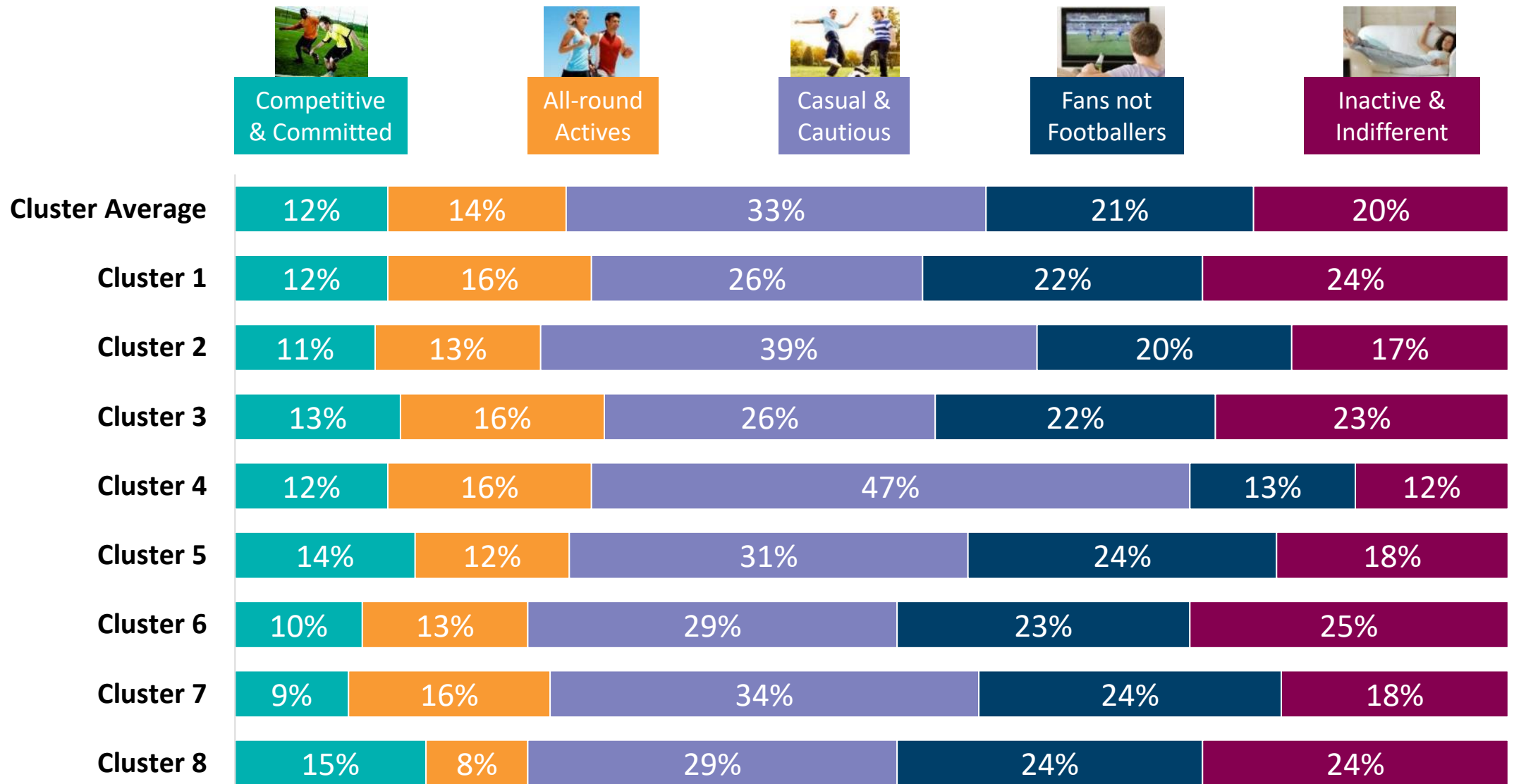
Cluster 1		Cluster 2		Cluster 3		Cluster 4	
Babergh	Purbeck	Barking and Dagenham	Liverpool	Basingstoke and Deane	Oadby and Wigston	Barnet	Kensington and Chelsea
Broadland	Ribble Valley	Birmingham	Luton	Bath and North East Somerset	Poole	Bexley	Kingston upon Thames
Chichester	Rother	Blackburn with Darwen	Manchester	Blaby	Reigate and Banstead	Brighton and Hove	Lambeth
Christchurch	Rutland	Bolton	Middlesbrough	Bracknell Forest	Runnymede	Cambridge	Lewisham
Cotswold	Ryedale	Bournemouth	Milton Keynes	Bromley	Solihull	Camden	Merton
Craven	Selby	Bradford	Newcastle upon Tyne	Broxtowe	South Gloucestershire	City of London	Oxford
Derbyshire Dales	South Hams	Brent	Newham	Canterbury	Spelthorne	Croydon	Reading
East Devon	South Lakeland	Bristol, City of	Northampton	Charnwood	St Albans	Dartford	Redbridge
East Dorset	South Norfolk	Broxbourne	Norwich	Chelmsford	Stockport	Ealing	Richmond upon Thames
East Riding of Yorkshire	Staffordshire Moorlands	Burnley	Nottingham	Cheltenham	Surrey Heath	Greenwich	Rushmoor
Eden	Stratford-on-Avon	Bury	Oldham	Dacorum	Three Rivers	Hammersmith and Fulham	Southwark
Forest of Dean	Stroud	Corby	Peterborough	East Hertfordshire	Trafford	Harrow	Sutton
Fylde	Suffolk Coastal	Coventry	Portsmouth	Eastleigh	Tunbridge Wells	Hillingdon	Wandsworth
Hambleton	Teignbridge	Crawley	Preston	Elmbridge	Warwick	Hounslow	Watford
Isles of Scilly	Tewkesbury	Derby	Rochdale	Epsom and Ewell	Windsor and Maidenhead	Islington	Welwyn Hatfield
Maldon	Torridge	Enfield	Salford	Gedling	Woking		Westminster
Malvern Hills	Wealden	Exeter	Sandwell	Guildford	Wokingham		
Melton	West Devon	Gloucester	Sheffield	Havering	Worthing		
Mid Devon	West Dorset	Gravesham	Slough	Hertsmere	Wycombe		
Mid Suffolk	West Lindsey	Hackney	Southampton	North Hertfordshire			
New Forest	West Somerset	Haringey	Southend-on-Sea				
North Dorset	Wychavon	Harlow	Stevenage				
North Kesteven	Wyre	Hyndburn	Stoke-on-Trent				
North Norfolk		Ipswich	Tameside				
		Kingston upon Hull, City of	Tower Hamlets				
		Kirklees	Walsall				
		Leeds	Waltham Forest				
		Leicester	Wolverhampton				
		Lincoln	Worcester				

Local Authorities included within each Cluster

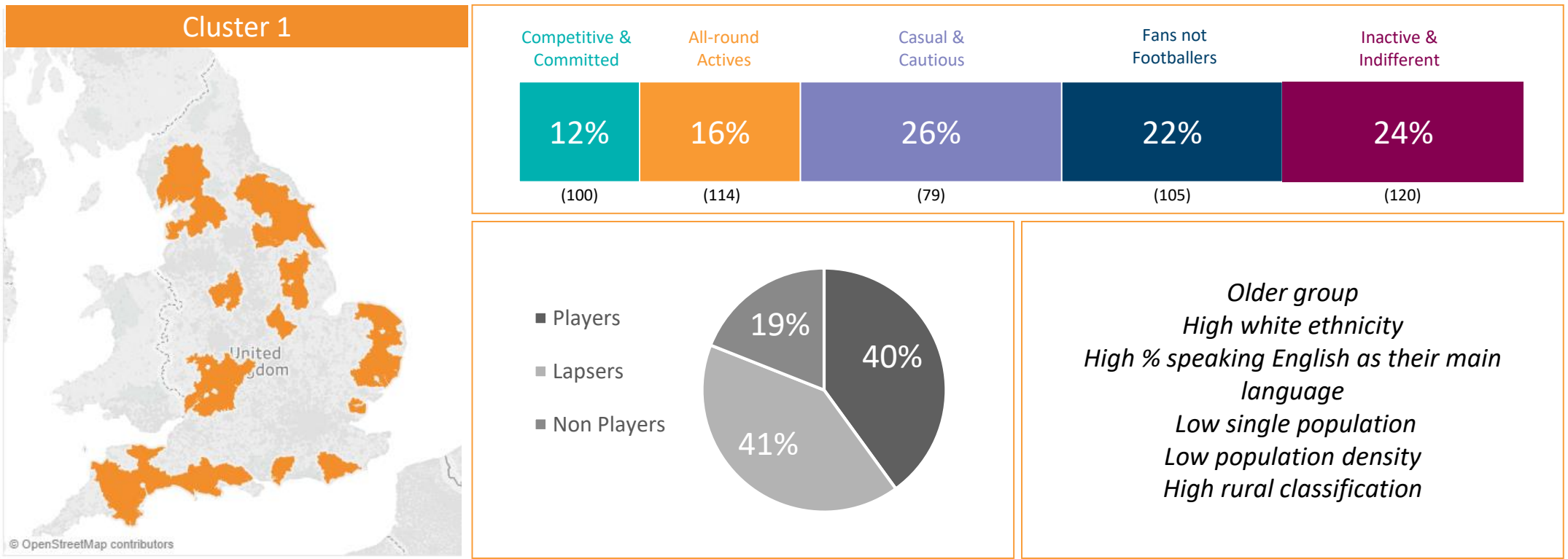
Cluster 5		Cluster 6		Cluster 7		Cluster 8	
Adur	Newcastle-under-Lyme	Aylesbury Vale	Mole Valley	Ashford	Medway	Allerdale	Newark and Sherwood
Ashfield	North East Lincolnshire	Braintree	North Somerset	Basildon	Pendle	Amber Valley	North Devon
Barnsley	North Tyneside	Brentwood	Richmondshire	Bedford	Redditch	Arun	North East Derbyshire
Barrow-in-Furness	Nuneaton and Bedworth	Bromsgrove	Rochford	Calderdale	Rossendale	Bassetlaw	North Lincolnshire
Blackpool	Plymouth	Castle Point	Rushcliffe	Cherwell	Rugby	Boston	North Warwickshire
Bolsover	Redcar and Cleveland	Central Bedfordshire	Sevenoaks	Colchester	South Derbyshire	Breckland	North West Leicestershire
Cannock Chase	Rotherham	Cheshire East	South Bucks	East Staffordshire	Swale	Carlisle	Northumberland
Chesterfield	Sefton	Chiltern	South Cambridgeshire	Forest Heath	Swindon	Cheshire West and Chester	Scarborough
Darlington	South Ribble	Daventry	South Northamptonshire	Kettering	Telford and Wrekin	Chorley	Sedgemoor
Doncaster	South Tyneside	East Cambridgeshire	South Oxfordshire	Lancaster	Thurrock	Copeland	Shepway
Dudley	St. Helens	East Hampshire	South Staffordshire	Maidstone	Wellingborough	Cornwall	Shropshire
Eastbourne	Stockton-on-Tees	East Northamptonshire	Stafford		York	County Durham	South Holland
Erewash	Sunderland	Epping Forest	Tandridge			Dover	South Kesteven
Gateshead	Tamworth	Fareham	Test Valley			East Lindsey	South Somerset
Gosport	Thanet	Harborough	Tonbridge and Malling			Fenland	St Edmundsbury
Halton	Torbay	Harrogate	Uttlesford			Great Yarmouth	Taunton Deane
Hartlepool	Wakefield	Hart	Vale of White Horse			Herefordshire, County of	Tendring
Hastings	Warrington	Hinckley and Bosworth	Waverley			High Peak	Waveney
Havant	Weymouth and Portland	Horsham	West Berkshire			Isle of Wight	West Lancashire
Knowsley	Wigan	Huntingdonshire	West Oxfordshire			King`s Lynn and West Norfolk	Wyre Forest
Mansfield	Wirral	Lewes	Wiltshire			Mendip	
		Lichfield	Winchester				
		Mid Sussex					

Across all, there is a high proportion of the lower engaged segments; FnF, C+C, I+I

Segments by Cluster

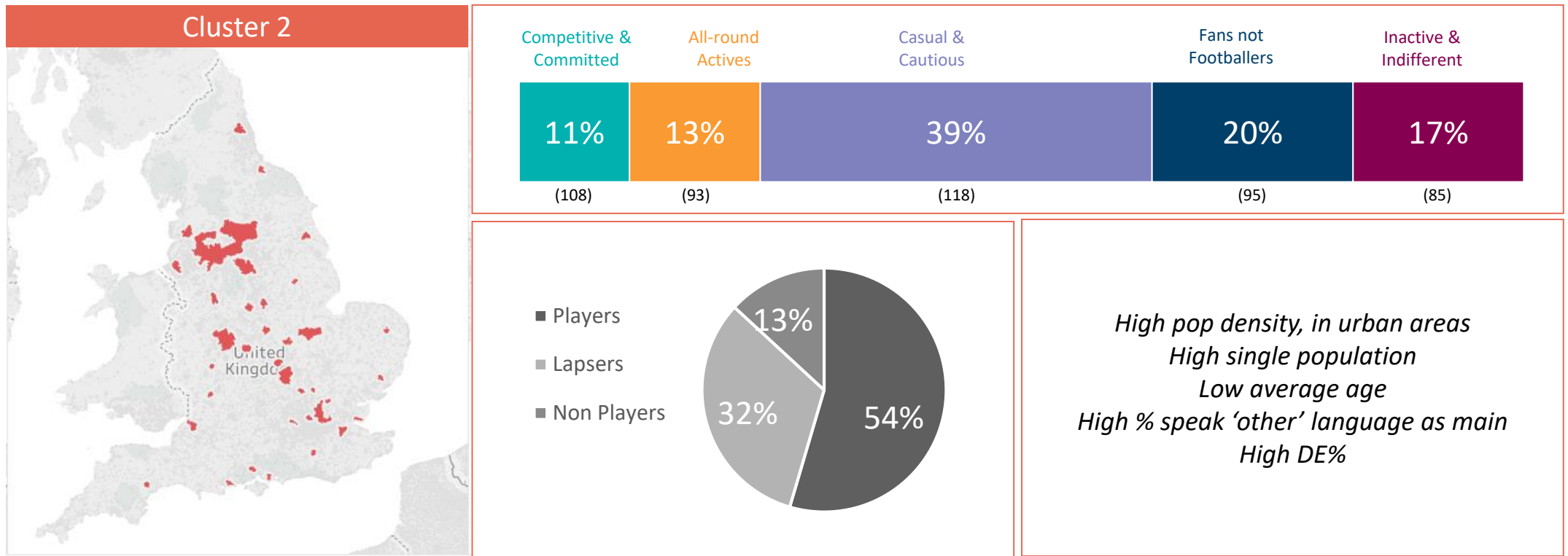


Cluster 1: Opportunity to utilise rural open spaces for a casual form of the game



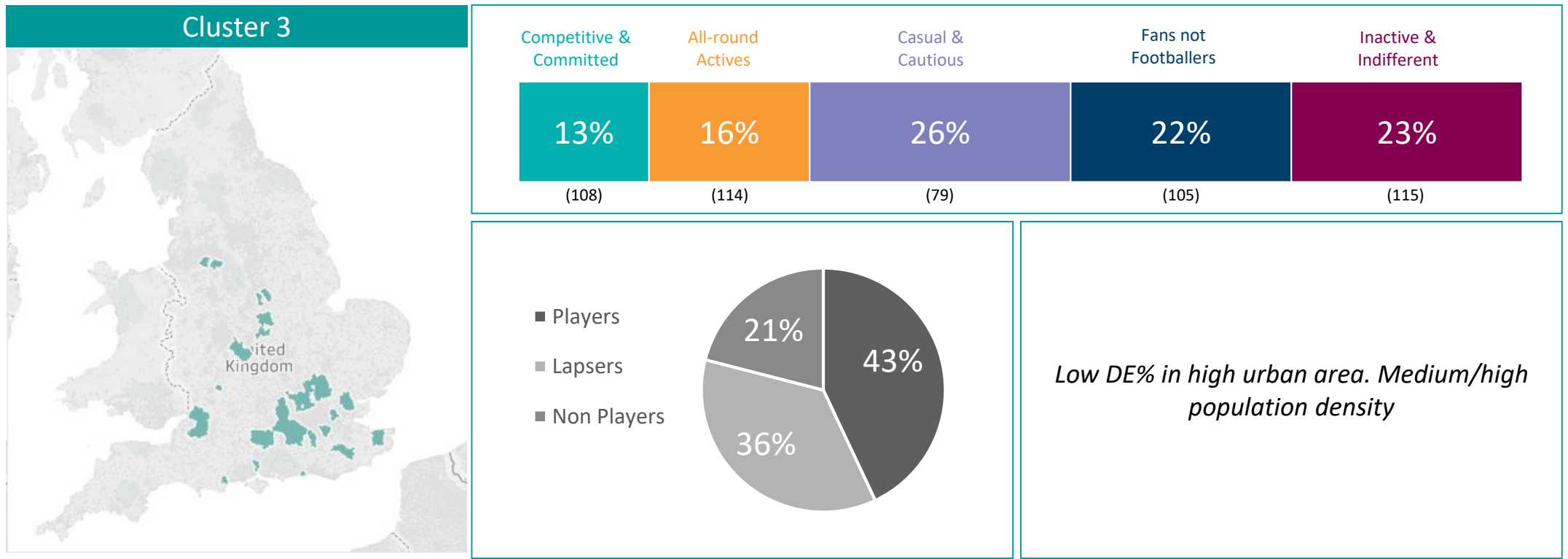
Local Authorities in this Cluster should focus on targeting the less engaged segments given the high proportion of lapsers, especially 'Inactive and Indifferent'. Promote casual 'back to football' forms of the game and given the high rural classification, opportunity to utilise open / green spaces. Opportunity for 'walking football' given the older demographic

Cluster 2: Biggest opportunity for Casual and Cautious



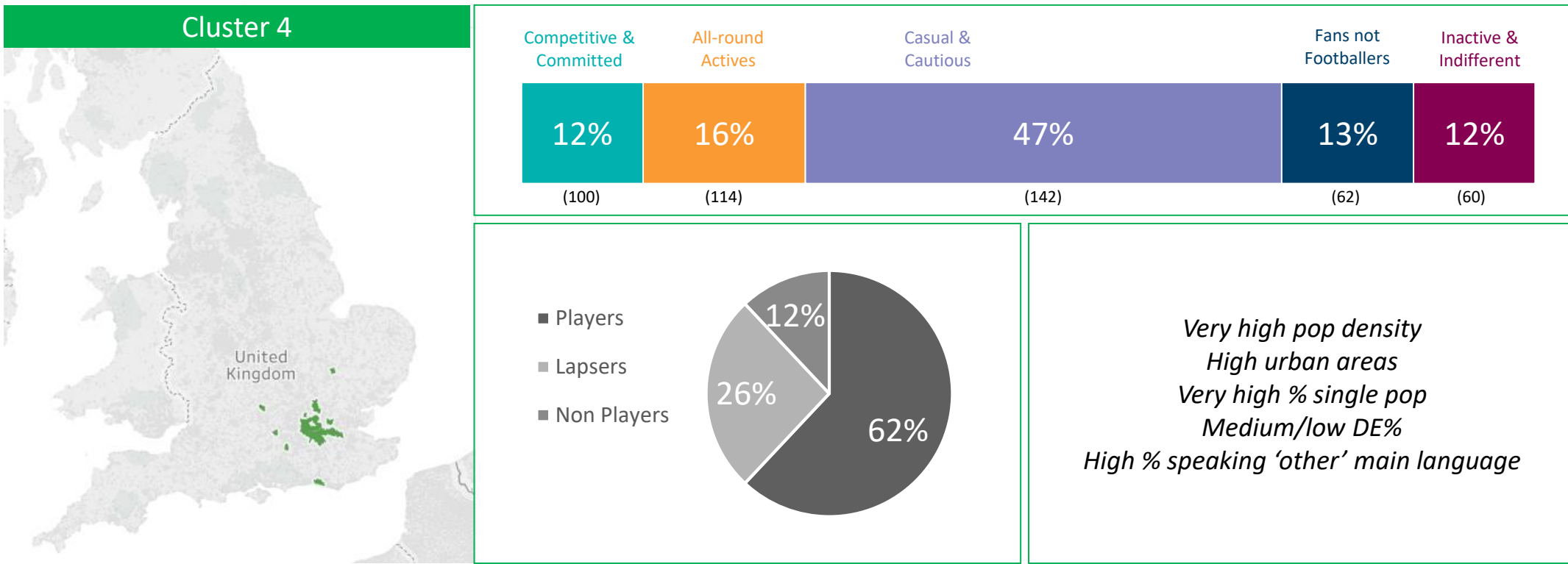
With a healthy level of current players, Local Authorities in this Cluster should target the largest segment 'Casual and Cautious' who are playing for the social and health benefits, not for serious competition. Promote low cost venues, weekend sessions and casual / unstructured forms of the game which focus on accessibility and fun

Cluster 3: Need to introduce new and lapsed players to the game



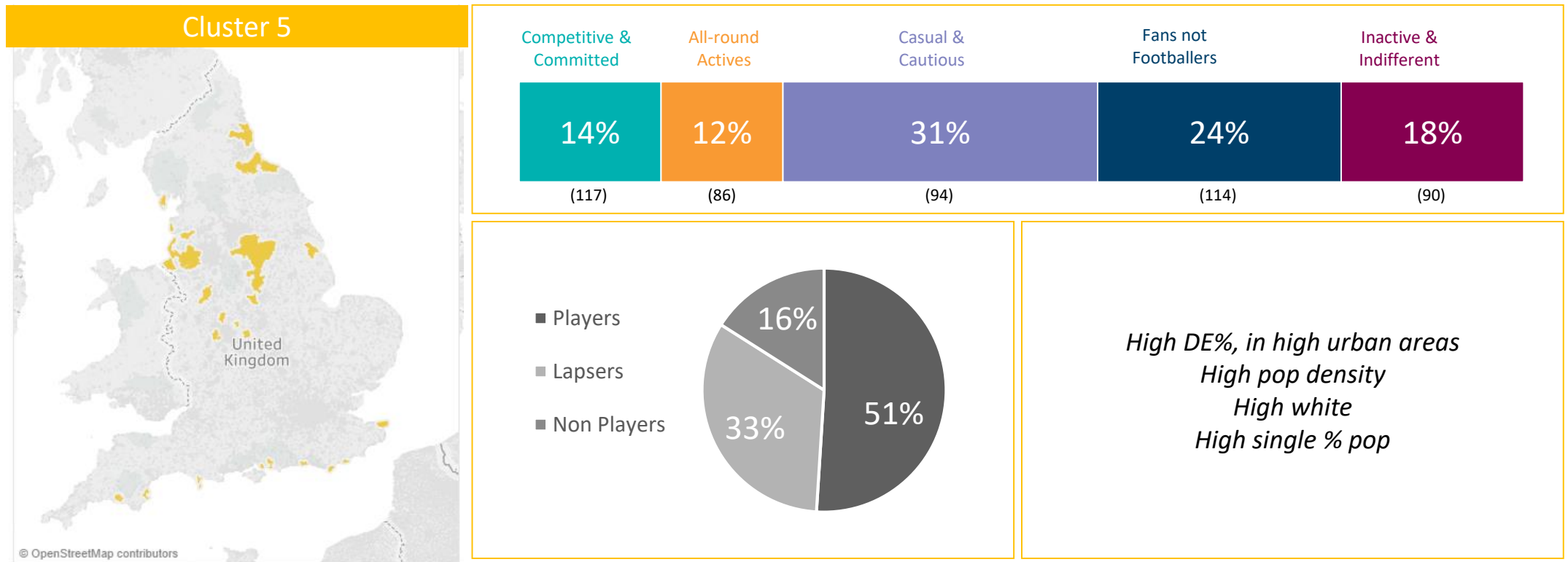
With one of the lowest levels of current players, getting lapsers and non players to play should be the focus for Local Authorities in this cluster, targeting the less engaged segments 'FnF, C+C and I+I'. Given the high urban population, utilising local parks and ensuring these are clean, safe to use should be the priority

Cluster 4: Opportunity for Casual and Cautious



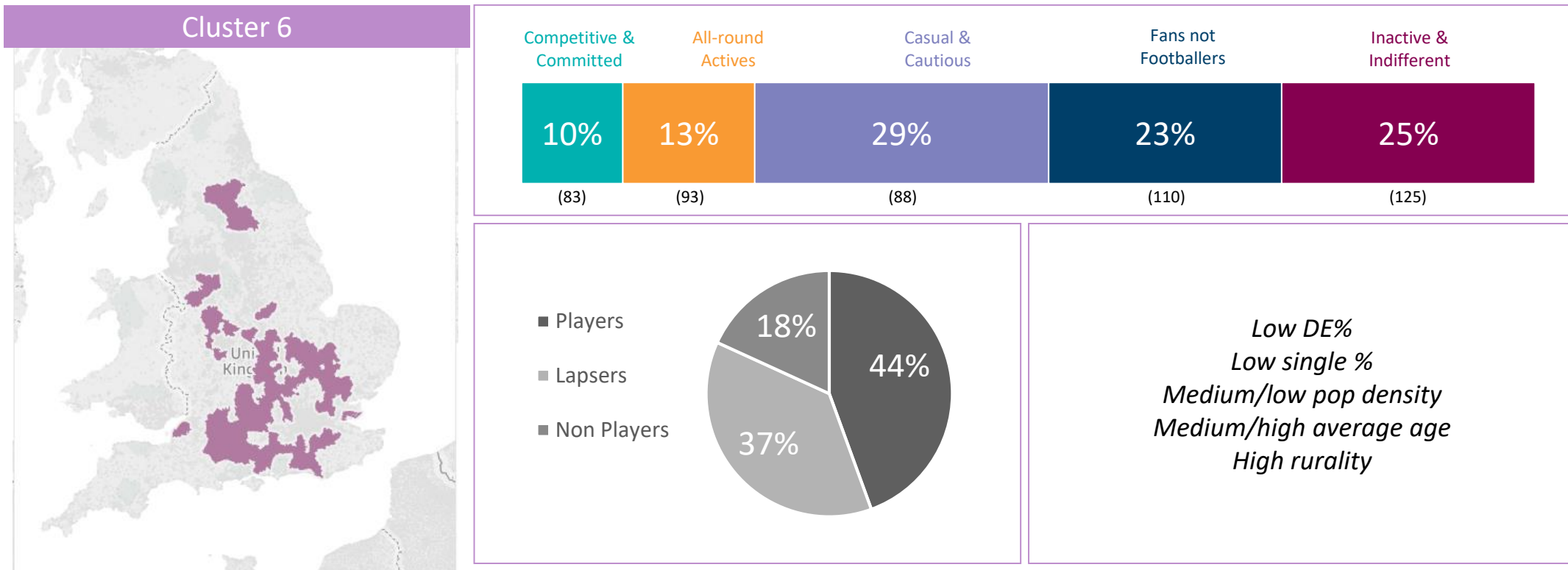
Similar to Cluster 2, Local Authorities in this Cluster should target the largest segment 'Casual and Cautious' who are playing for the social and health benefits, not to be overly competitive or take it seriously. Promote low cost venues, weekend sessions and casual / unstructured forms of the game which focus on accessibility and fun

Cluster 5: Higher potential with Competitive and Committed vs. other clusters



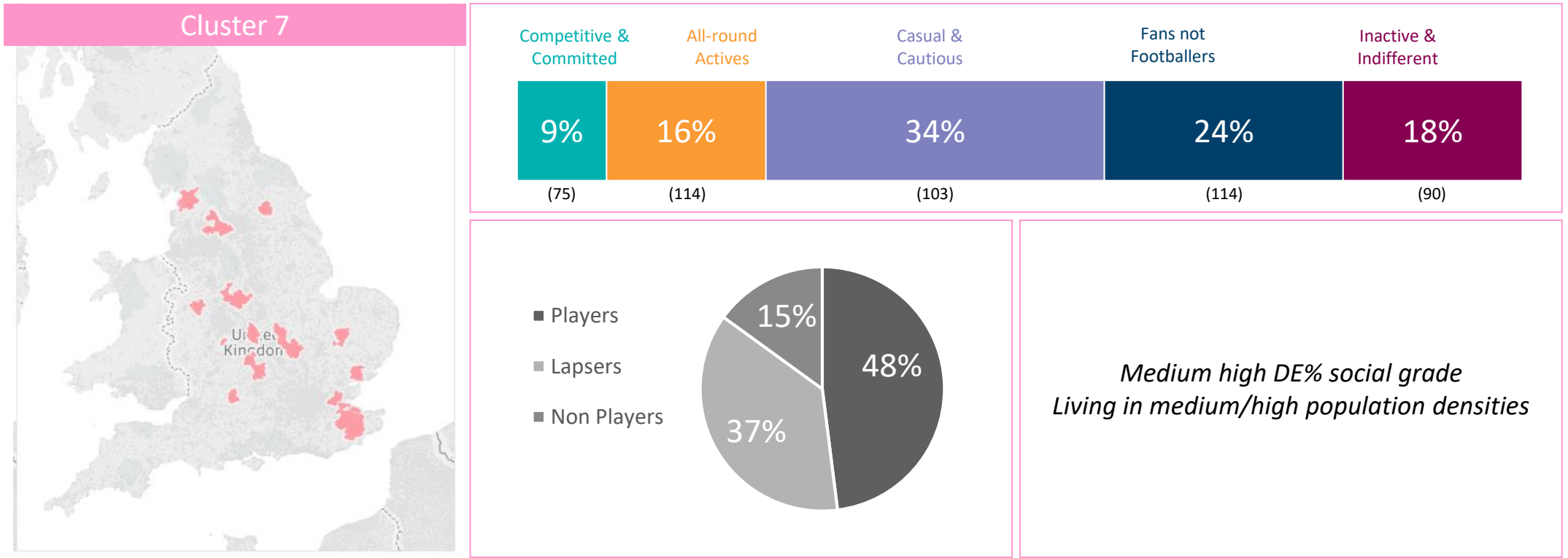
Local Authorities in this Cluster have more potential with the Competitive and Committed vs. other Clusters showing an opportunity for specialist facilities including more structured sessions with competition. Ensuring an easy booking system and accessibility will be key. Skew also to Fans not Footballers and therefore try to appeal to their football fandom; given the high prevalence in northern urban areas, is there an opportunity to make the links with football clubs more overt?

Cluster 6: Inactive and Indifferent should be the core target



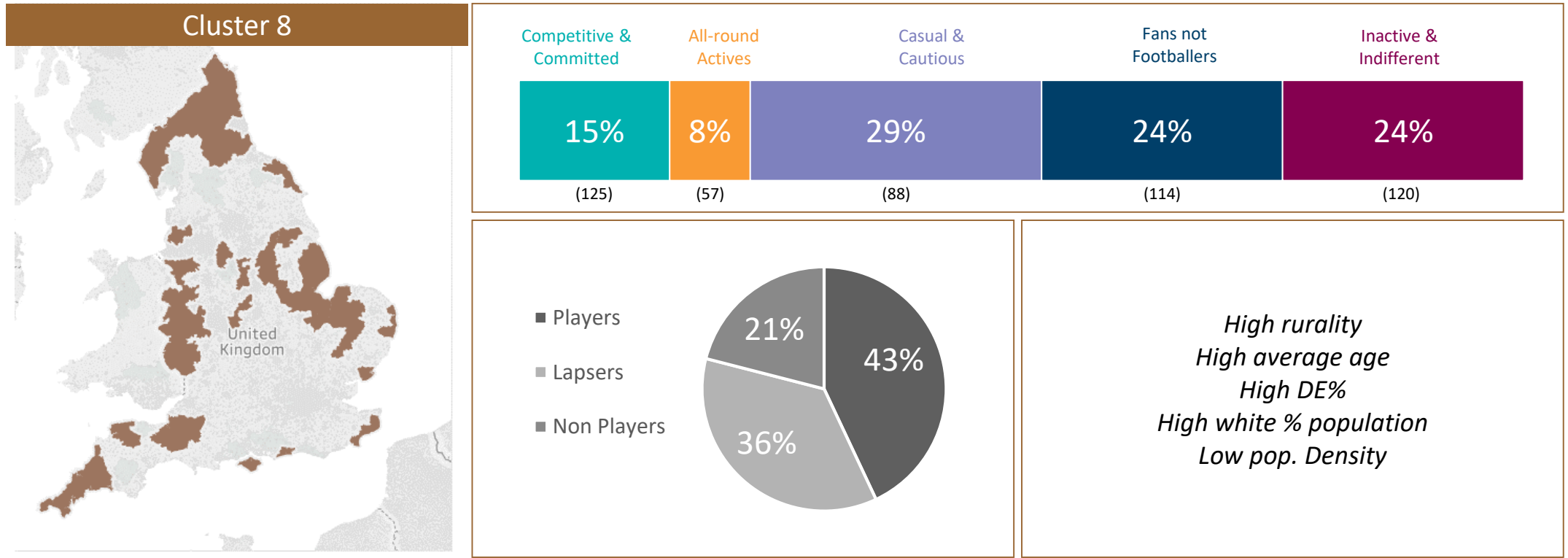
Local Authorities in this Cluster should focus on engaging non players and lapsers and target the lower engaged segments, especially 'Inactive and Indifferent' Utilise green open spaces, given high rurality including parks suitable for families (as low single). The high average age suggests Walking Football could be an opportunity to re-engage (good presence of FnF)

Cluster 7: More of a potential with All-round Actives vs. other Clusters



More of an opportunity for All-Round Actives in this Cluster - Local Authorities in this Cluster should tap into multi sports facilities and leisure centres which may already be present in medium/high density areas. Large Casual and Cautious group also a key target to engage with unstructured sessions and accessible and value options. Additionally need to engage Fans not Footballers via their fandom, opportunity to link with football clubs?

Cluster 8: Opportunities at both ends of the small sided football audience



Opportunities at both ends of the SSF audience in this Cluster – higher proportion of Competitive and Committed compared to other Clusters, along with more Inactive and Indifferent. Both specialist facilities and local parks important offering a variety of sessions from the more competitive options to more casual and unstructured forms. Fans not Footballers also prevalent here and therefore linking with football clubs also an opportunity

Regional Cluster Summaries

Demographic skews
(FA Cluster analysis)

Segment opportunities
(2CV research)

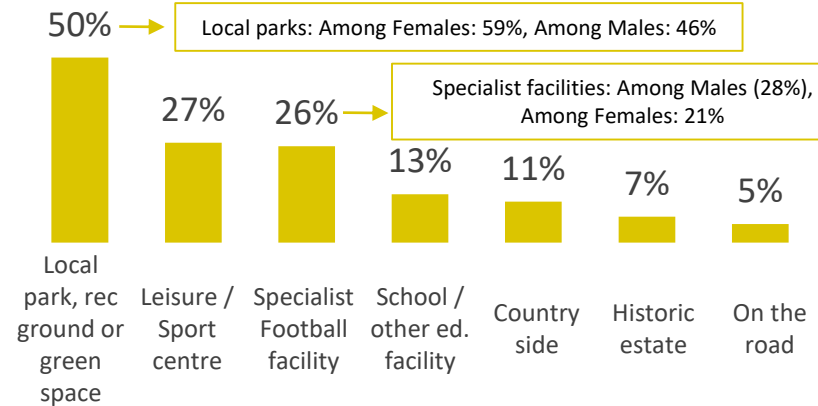
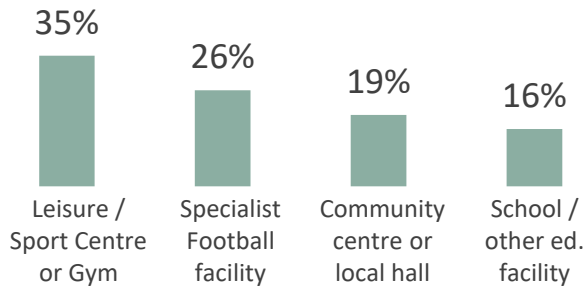
Cluster 1: 14%	Cluster 2: 18%	Cluster 3: 12%	Cluster 4: 10%
<i>Re-engage lapsed and target the 'Inactive and Indifferent' segment</i>	<i>Biggest opportunity is for Casual and Cautious</i>	<i>Prioritise the lower engaged segments to introduce new / lapsed players to the game</i>	<i>Biggest opportunity is for Casual and Cautious</i>
<ul style="list-style-type: none"> • Older group • High white ethnicity • High % speak English as main • Low single pop • Low pop density • High rural classification 	<ul style="list-style-type: none"> • High pop density, in urban areas • High single population • Low average age • High % speak 'other' language as main • High DE% 	<ul style="list-style-type: none"> • Low DE% in high urban area • Medium/high population density 	<ul style="list-style-type: none"> • Very high pop density • High urban areas • Very high % single pop • Medium/low DE% • High % speaking 'other' main language
Cluster 5: 13%	Cluster 6: 14%	Cluster 7: 7%	Cluster 8: 13%
<i>Competitive and Committed a higher potential vs. other Clusters. Important not to neglect less engaged segments who are still a large proportion, incl FnF</i>	<i>Core target should be the Inactive and Indifferent segment</i>	<i>Higher potential with All Round Actives and Fans not Footballers in this cluster vs. others. Engaging Casual and Cautious also really important</i>	<i>Opportunities at both ends of the small sided football audience with both Competitive and Committed and Inactive and Indifferent. Fans not Footballers also key</i>
<ul style="list-style-type: none"> • High DE%, in high urban areas • High pop density • High white • High single % pop 	<ul style="list-style-type: none"> • Low DE% • Low single % • Medium/low pop density • Medium/high average age • High rurality 	<ul style="list-style-type: none"> • Medium high DE% social grade • Living in medium/high population densities 	<ul style="list-style-type: none"> • High rurality • High average age • High DE% • High white % population • Low pop. Density

Facility Priorities

Parks are most sought after but leisure centres, specialist venues, schools and community centres also play a crucial role for SSF provision (esp. outside of summer)



Where would their ideal small sided football session take place?



Net Specialist facilities (Indoor/Outdoor) are less appealing to those of lower social grades: Among ABC1 (46%), Among C2DE: 40%
 Parks are directionally higher for lower social grades: Among ABC1 (48%), Among C2DE (52%)

Indoor venues with higher preference vs. total

Competitive & Committed	All round Actives	Fans not Footballers	Casual & Cautious	Inactive & Indifferent
Leisure / sport centre / gym Specialist facility	Leisure / sport centre / gym	Specialist facility Leisure / sport centre / gym	NA	Community Centre / Local Hall

Outdoor venues with higher preference vs. total

Competitive & Committed	All round Actives	Fans not Footballers	Casual & Cautious	Inactive & Indifferent
Leisure / sport centre / gym Specialist facility	Local parks Leisure / sport centre / gym	Leisure / sport centre / gym Specialist facility	NA	Local park Countryside

Current facilities are perceived as serving either 'proper footballers' or the 'community'

World of football



Indoor Specialist SSF centre

Outdoor Specialist SSF centre

Leisure/sport centres/gyms

Schools

Local parks/green spaces

World of community



- High quality 3G pitches with great facilities (eg bar, changing rooms, parking)

BUT

- Can feel very intimidating, described as a 'Cauldron of anger'
- A more expensive option

- Facilities feel familiar, accessible and already part of their world

BUT

- Often much lower quality
 - Hard courts, astroturf, or grass
 - Often poorly maintained and unloved
 - Have fewer amenities
- Can feel too unstructured and informal for some male audiences

Appeals more to those who want to play to win and play less recreational/more structured football

Appeals to those who want to play for fun/next goal wins and play more recreational/less structured football

And our segments show some preference across facilities...

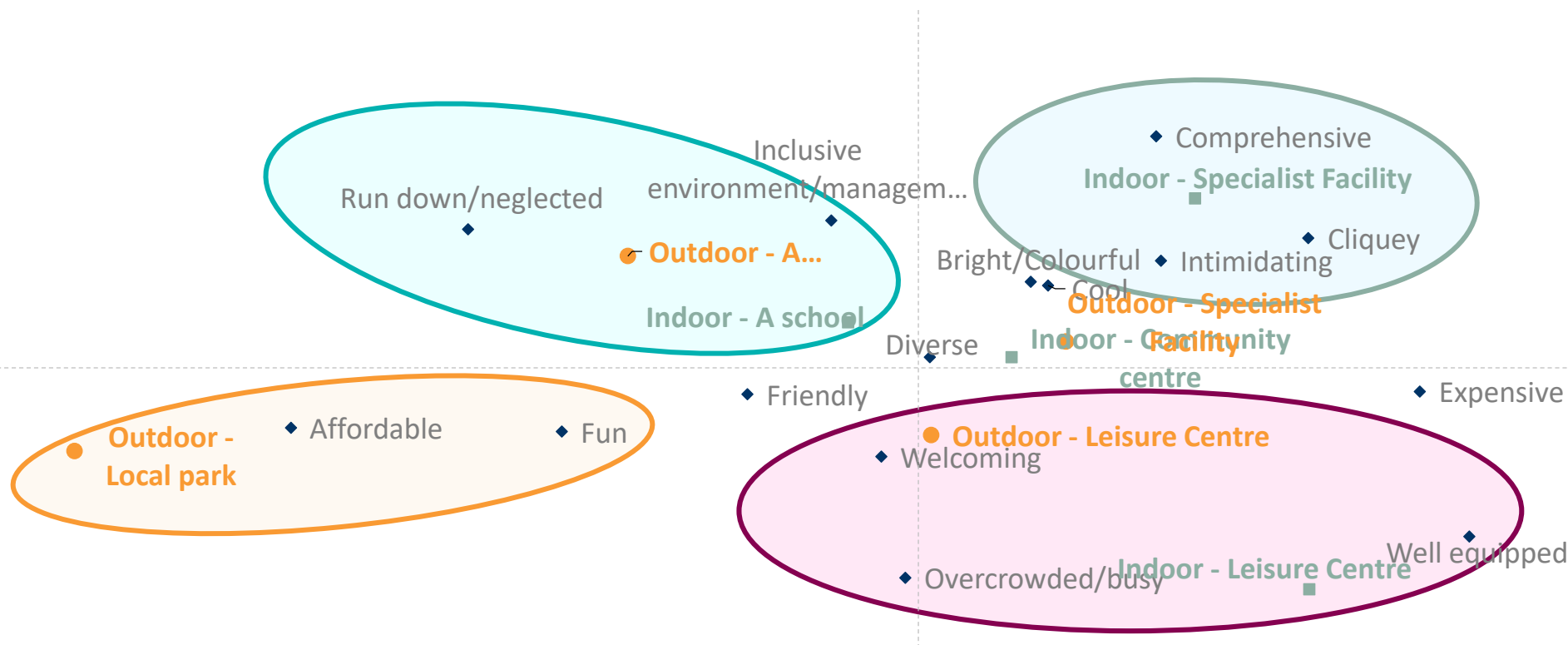


... **BUT it's not as simple as different facilities for different segments... it's more about activation and positioning...**

Some venues perceived to offer different experiences; specialist are comprehensive but can be cliquey and intimidating while leisure centres are well equipped yet busy



Perceptions | All venues



Need to address availability in Leisure Centres, smarten up schools and offer a more inclusive environment at specialist venues

In terms of surface, grass (well maintained) and 3G playing surfaces are preferred and should be prioritised. Tarmac and concrete surfaces do not appeal



What type of surface do they prefer to play on?

INDOOR

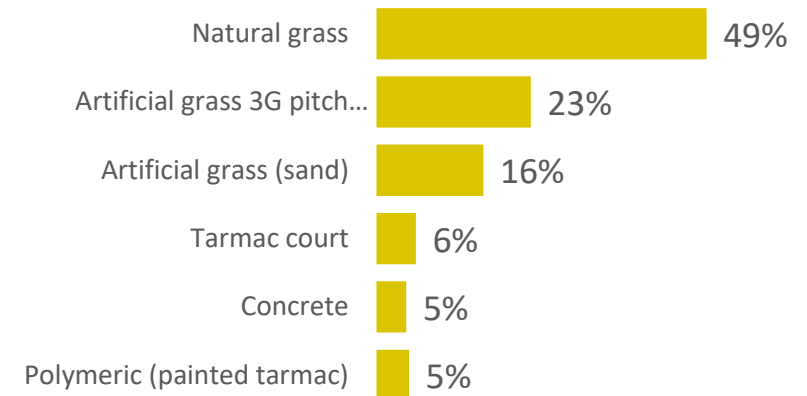
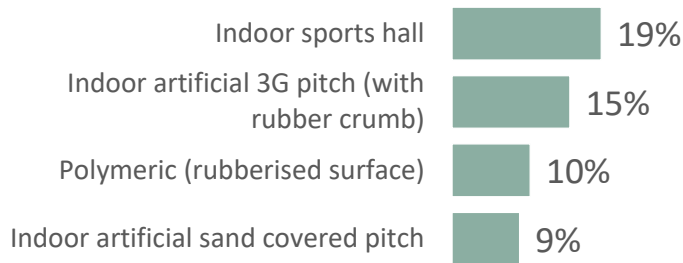


9% happy on any surface

OUTDOOR



NET 3G*: 30%



All segments show a preference for grass playing surfaces overall, especially the Competitive and Committed and Inactive and Indifferent.

3G surfaces* are more sought after by males and the Competitive and Committed / Fans not Footballer segments.



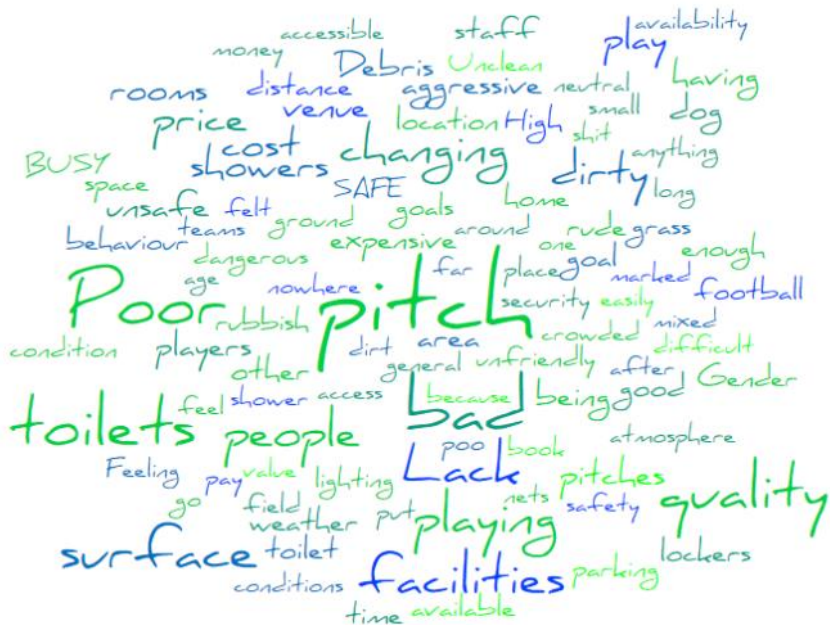
Ideal type of SSF (among those who want to play on grass)	Competitive & Committed	Inactive & Indifferent
	Formal	72%
Informal	22%	64%



The type of SSF people want to play on grass varies considerably by segment – consideration to type of provision (and who it will attract) therefore required

Alongside a quality pitch & toilets, people want the security of a safe environment; in and around the venue, on and off the pitch

What would put you off a venue?



Expensive fees, rude/ impolite staff and booking issues were also mentioned

Again, the pitch is the key factor which would make people move away from a venue
It should be a good surface, clean, well marked with goals (and ideally nets and cages)

The pitch - it needs to be flat, marked and have goals. I'm not 5 anymore

Dog poo or broken glass on the playing surface

The actual pitch if its not caged netted and marked

Availability of clean toilets

Disgusting toilets

No toilets! Toilets are needed everywhere

There was some push back on same-sex facilities

If changing rooms were mixed sex. No woman wants to get changed with men around

Gender Neutral toilets, shower, and changing rooms

Aggressive behaviour – both on and off the pitch – and safety is also a big concern

If it was outside and it was an unsafe area. This would be concerning at night

Lousy weak referees, overly-aggressive opponents

Certain types of teams that are aggressive. My local one has had stabbings after a match. Puts me and my family off

Aggressive behaviour on or around pitch

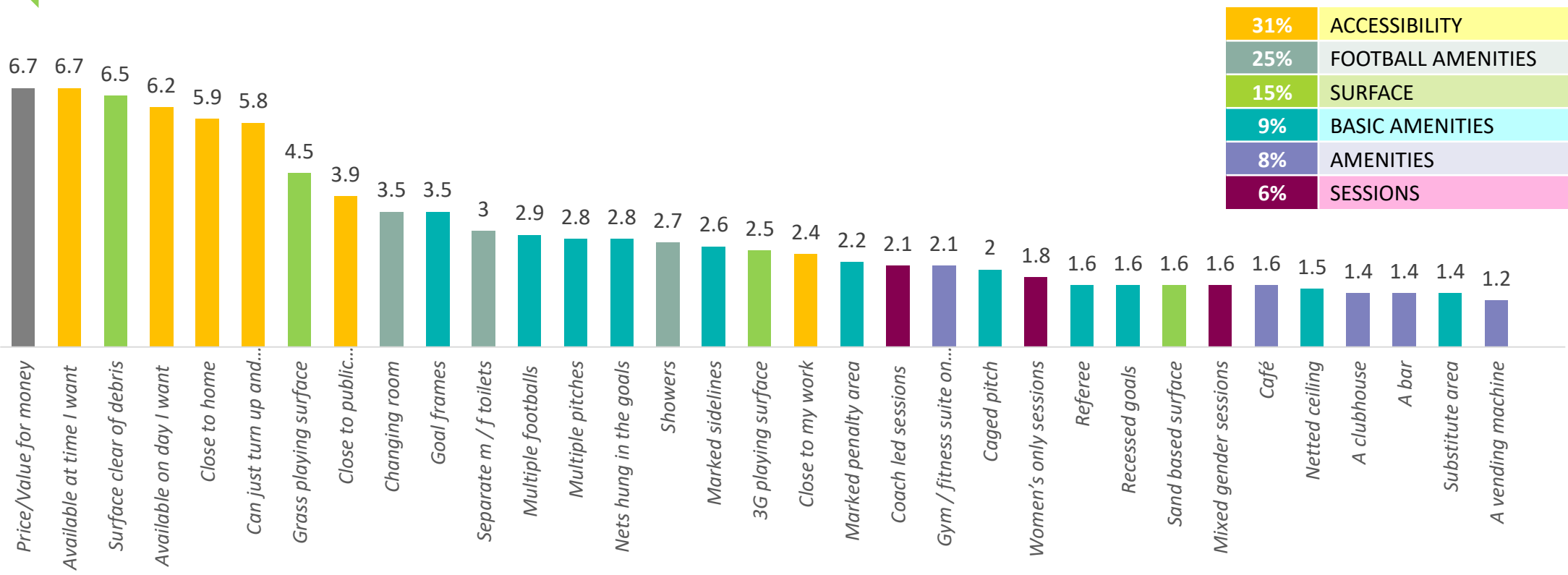
We've used a technique called 'Max Diff' (Maximum Difference Scaling) to understand the relative importance attached to a variety of facility features

Max Diff allows you to rank consumer preference for a long list of items (20-40 items) without forcing respondents to rank them manually; this allows you to identify the rank order and strength of preference and analyse by subgroup

- This technique involves presenting respondents with a series of choice sets of a subset of items and asking them to select the one they like best and least from each
- By repeating this exercise numerous times, we are able to **estimate each respondent's level of preference for each item relative to all others** in the list
- The benefit of this approach is that consumers are better at judging items at extremes (most and least) rather than ranking a long list, therefore the data we retrieve from a Max Diff analysis is not only **less cognitively demanding**, but also **more reliable** than manual ranking
- The output from a Max Diff includes an **overall ranking** of each item and **strength of preference** for each item that can be split by subgroup and **recalculated based on different subsets of items**
- If required, a cluster analysis can also be applied to the data in order to **identify new segments who prefer certain types of items**
- In this instance, we had a list of 33 different types of feature that could be offered at a small sided football facility



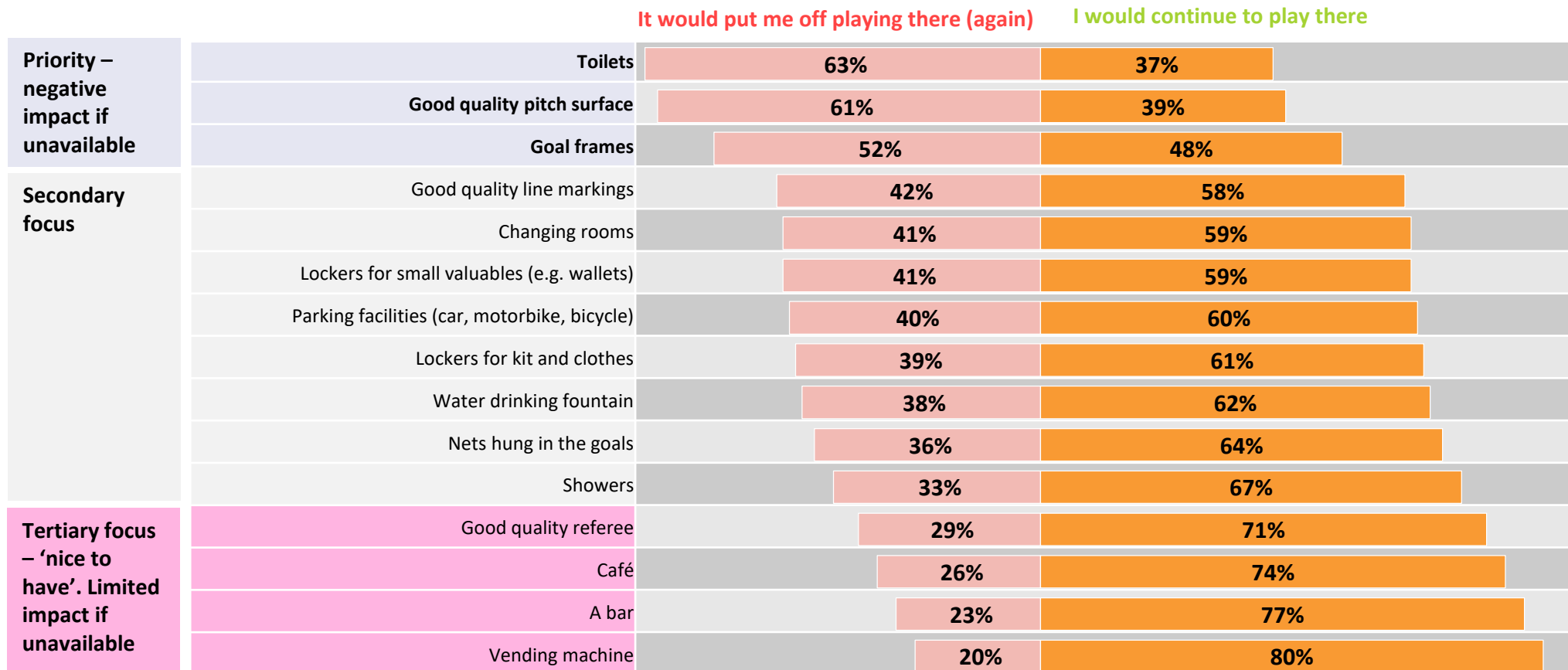
The Max Diff exercise highlights the importance of price/value, surface, availability and accessibility



Note: priorities largely align vs Manchester, though proximity to public transport is notably more vital to a London audience

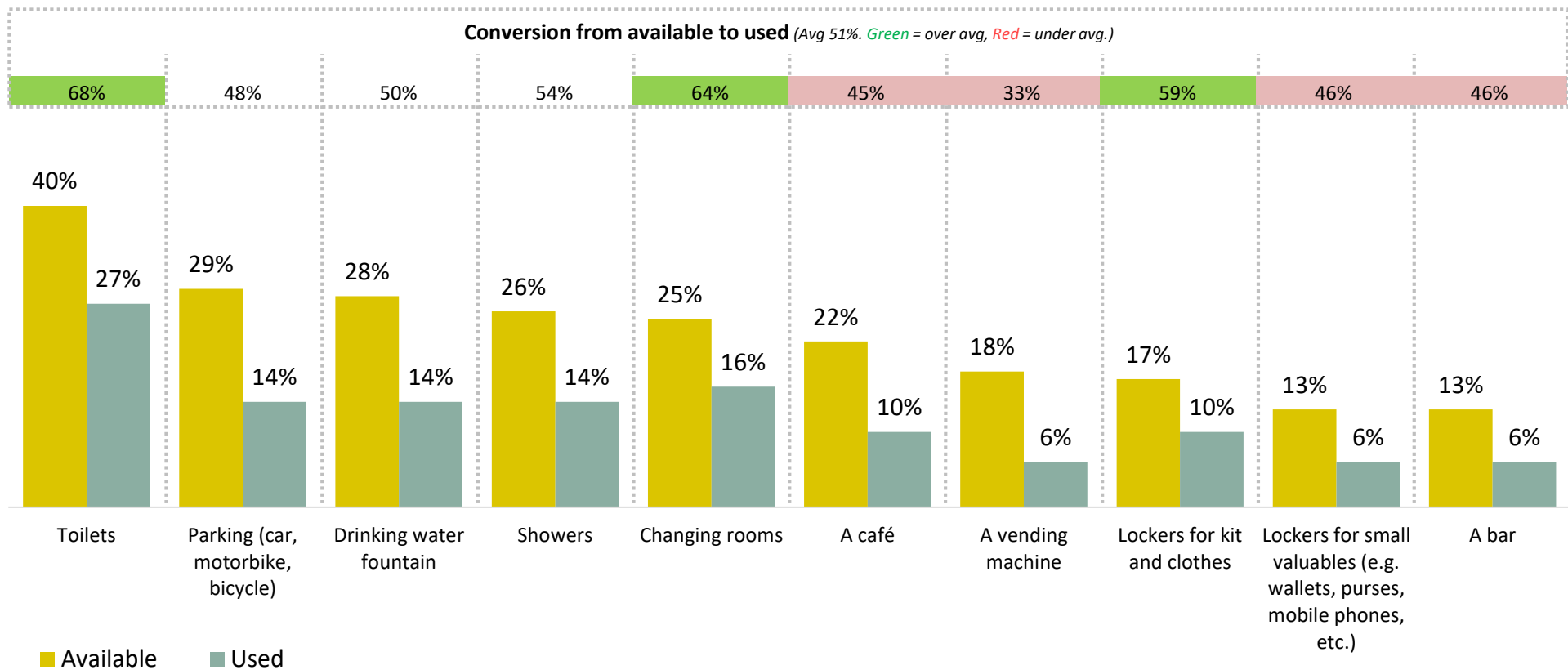
The top priorities to keep players at a venue are pitch surface, goal frames & toilets

Likelihood of playing if facilities not available



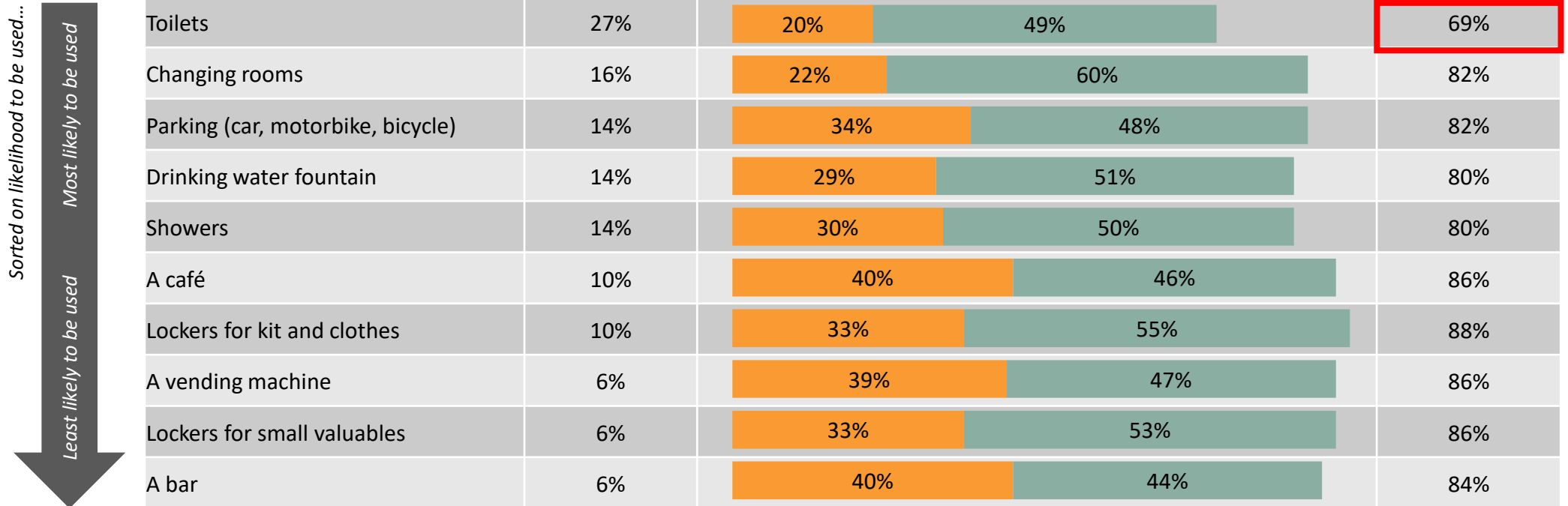
Currently, less than half of venues have desired toilet facilities. Where available, there is highest conversion to usage for toilets, changing rooms and lockers for kit

Facility availability & usage...



Where available, most facilities are of good quality. There is opportunity to improve toilets compared to other amenities

Facility usage and performance...



People want clean, gender segregated toilets

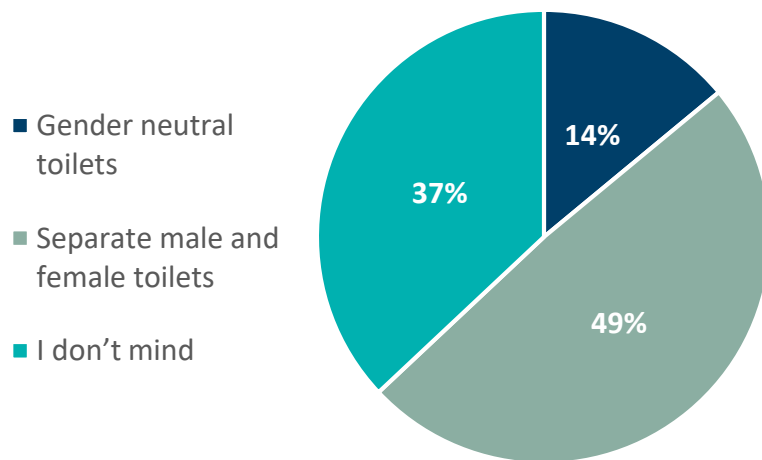
Focus on toilets...

40% have toilets available,
27% have used



69% who have used toilet facilities
rated them as 'good/ very good'

What type of toilets should be available...



How to improve performance...

pay
paper
hygiene
Poor
Dirty
Unclean
small

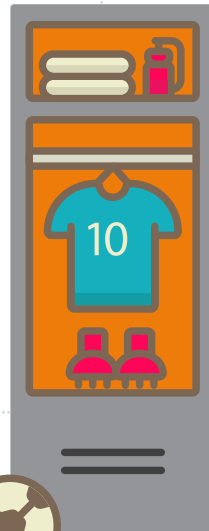
"They were not
very **clean** when
I used them"

"Because you
had to pay for
a small one"

There is no clear 'winner' for types of changing room but they should have an atmosphere/ environment where people feel safe

Focus on Changing rooms...

25% have them available,
16% have used



82% who have used changing rooms rated them as 'good/ very good'

What kind of changing rooms do they want?

Team/group/communal changing room with showers	23%
Gender neutral individual changing cubicle with shower	21%
I don't mind	19%
Suitable bench to put on/take off footwear (without showers)	17%
Gender neutral individual changing cubicle without showers	14%
Team/group/communal changing room without showers	12%
I don't need changing facilities where I play small sided football	15%

With shower (net) 40%
Without showers (net) 49%

How to improve performance...

Though limited response, the subtext is that changing rooms need to provide a safe atmosphere where people are comfortable undressing

"Bit beaten up. Felt a bit dodgy" Only 3 responses

"Not a very nice atmosphere to be in"

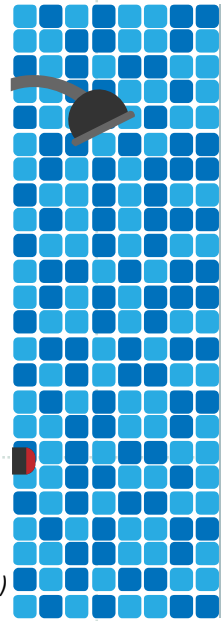
"Unkempt park. It was dirty with cobwebs"

Gender neutral individual changing cubicles are higher for our disabled SSF audience but no difference by ethnicity nor 'non heterosexual' groups (in fact those classifying as LGBT are more likely to say they don't mind and say they don't need changing rooms)

Showers appear to be a 'nice to have' – lack of availability doesn't deter players. Where available they should be clean with good water pressure

Focus on Showers...

26% have showers available,
14% have used

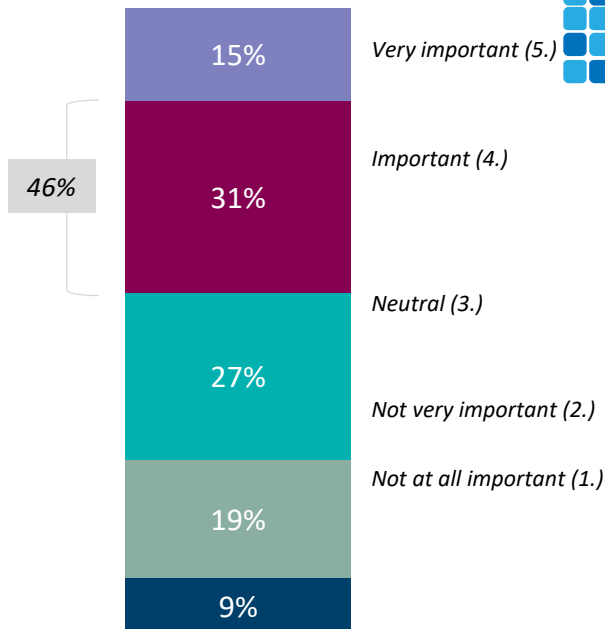


80% who have used shower facilities
rated them as 'good/ very good'

How to improve performance...

67% would continue
to play at a venue
without showers

How important is it
that showers are
available?
Top box score 'very
important' is low



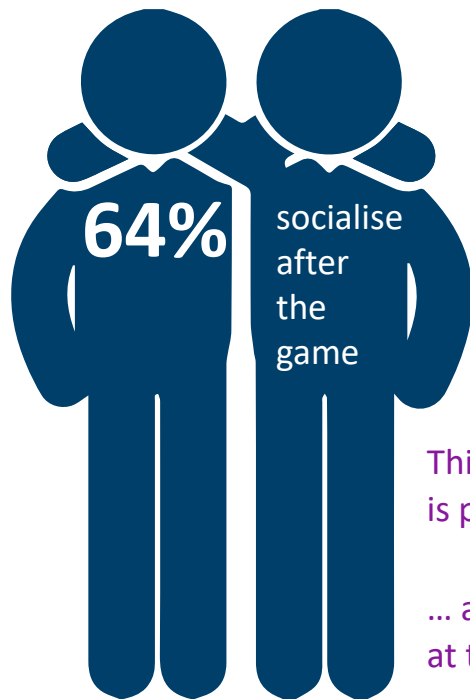
Poor Facilities
Poor space
Dirty
Low water pressure

"Dirty and
low water
pressure"

"Poor space,
dirty"

Socialising after matches is common – more likely off site. Having a social space at the venue, especially a bar, increases likelihood to spend time with teammates

Socialising after the game...



This increases to **83%** if a bar is present at the venue

... and **79%** if a café is present at the venue

Where do people socialise?

	Nearby (outside of the football venue)	At the football venue
	<i>Total sample (all players/ lappers)</i>	
In a bar	23%	13%
In a café	18%	14%
	<i>Among those who play at a venue where a bar/ cafe is available</i>	
In a bar	26%	43%
In a café	23%	28%

Summary and recommendations

Facilities have **different roles** for SSF provision, for **different people** and at **different times** of the year, and there is opportunity in all of them...

Specialist SSF facilities

- High levels of satisfaction however, relatively low awareness among wider audience
- Appeal and usage skews to core, more 'serious' footballing segments. Can feel intimidating to casual and non-players (especially females)
- **Look to promote these facilities as friendly, inclusive and accessible, with provision for all player types**
- **Dial up messages around value for money – driven by quality surfaces and experience (proper goals with nets, etc.)**



Summary and recommendations

Facilities have different roles for SSF provision, for different people and at different times of the year, and there is opportunity in all of them...

Leisure centres

- High awareness for leisure centres; well established in local communities
- Satisfaction with leisure centre venues is lower than specialist facilities (and vs. other regions); opportunity to improve the experience for players here
- **Perceived to be inclusive, friendly and well equipped so potential to reach a broader and older audience. And with indoor options, have greater appeal to the more weather conscious**
- **Provision needs to maximise availability and opportunities to play**



Summary and recommendations

Facilities have different roles for SSF provision, for different people and at different times of the year, and there is opportunity in all of them...

Schools

- High presence of schools in communities but awareness of SSF facility access is low
- Among users, satisfaction is typically lower as facilities feel neglected (vs. specialist venues)
- **However, school sites do feel more inclusive and accessible to the broader footballing audience, and provide a more cost effective means of playing**
- **When working with schools, look to open up their pitches for SSF provision, focussing on those with quality surfaces and facilities**



Summary and recommendations

Facilities have different roles for SSF provision, for different people and at different times of the year, and there is opportunity in all of them...

Local parks

- Have the highest awareness / usage vs other SSF facilities
- Perceived as affordable, fun and accessible (especially to wider audiences) but lacking in the areas of quality facilities (including toilets) and playing surfaces
- **Key priorities are to keep pitches clear and usable, especially in the summer months when demand is higher**
- **Consider using major parks / green spaces as SSF hubs, with pop-up facilities (e.g. 5-a-side goals) to permit play**



Research Methodology

Objectives and overview of the project

- Sport England and The FA want to take a customer focused approach to understand more about the small sided football market in terms of players and potentials (lapsed, non players/considerers) in order to drive participation and growth of the sport
- More specifically to understand:
 - The size of the market (players, lapsed, non players/considerers) and who they are
 - How the market segments in terms of attitudes; delivering distinct and meaningful segments that represent the opportunities in small sided football in terms of demographics, attitudes, motivations and barriers
 - How small sided football is played; who, what, where, how and attitudes/motivations and barriers to playing
 - Facilities being used, satisfaction and areas to focus on in improving



Since 2016, 2CV have conducted several research pieces to inform the strategy

In total, we have spoken to **6491** respondents in England



2016:

- N=1051 **Nationally representative Quantitative Segmentation**, plus ‘Upfront Sizing’ (n=531), YouthSight (n=392) and Facility Operators boosts (n=380)

2017:

- 6 x **Qualitative Teledepths** and 9 x **Qual Focus Groups** across Manchester and Nottingham exploring small sided football facilities and segment nuances
- Quant online surveys across **Manchester** (n=509), **Nottingham** (n=253), **London** (n=3178) understanding the facility landscape and segmentation fall out

2018:

- Quant Segmentation extension across **8 x FA identified clusters of local authorities** (n=2037)

The Methodologies in detail...

Phase 1: Nat Rep Quant Segmentation	Phase 2: Manchester, Nottingham, London extension	Phase 3: Quant Cluster Extension
<ul style="list-style-type: none"> ▪ A 20 minute online survey covering overall sport behaviour, attitudes to football, barriers/motivations to playing SSF, understanding how it is played and facilities to identify our segments ▪ N=1051 Nat Rep sample, n=392 Youth Sight boost (16-25s) and n=380 facility operator's boost ▪ Sample: 16+ in England, who exercise at least a few times a year and are either players, lapsers or non players/ considerers of SSF ▪ Sizing conducted by retaining screened data and following this, quotas set on age, gender, SEG and region to give us a representative sample ▪ Fieldwork: 25th Aug – 26th Sept 2016 	<p>QUAL: Nottingham and Manchester</p> <ul style="list-style-type: none"> ▪ 6 x teledepths with small sided football providers <ul style="list-style-type: none"> ▪ To understand successes/challenges with provision ▪ 9 x focus groups with Casual and Cautious, Fans not Footballers, All Round Actives and Inactive and Indifferent segments <ul style="list-style-type: none"> ▪ To understand the relationship with sport/activity and football ▪ How best to engage them, including specific facilities ▪ Fieldwork: June/July 2017 <p>QUANT: Nottingham, Manchester, London</p> <ul style="list-style-type: none"> ▪ N=509 Manchester, N=253 Nottingham, N=3178 London ▪ A 20 minute online survey covering the segmentation questions, barriers/motivations to playing SSF, understanding how it is played and additional questions on facilities and the ideal session ▪ Sample: 16+ in England, who exercise at least a few times a year and are either players, lapsers or non players/ considerers of SSF with quotas set on age and gender (based on nat rep study) ▪ Fieldwork: July 2017 (additional London Boroughs Dec 17) 	<ul style="list-style-type: none"> ▪ A 5 minute online survey, covering the segmentation questions and key demographics ▪ N=2000 split across 8 local authority clusters identified by The FA (n=250 per cluster) ▪ Sample: 16+ in England, who exercise at least a few times a year and are either players, lapsers or non players/ considerers of SSF • Quotas set on age and gender (based on the nat rep study). Player type and segment was allowed to fall out naturally ▪ Fieldwork: 9th Feb – 19th Feb 2018

Definition of Small Sided Football: Organised 4/5/6/7/9 a side, futsal, walking football, informally with pitch hire, informally with no pitch hire)