

KANTAR



UEFA National Association Research

Polish Football Association
July 2019



UEFA GROW

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Executive Summary

Summary of key points

Sports interest & football following

- Football top and has improved since 2016
- Overall football interest above the European benchmark, especially for women
- National team football generates higher interest than domestic league but the gap is closing

Participation

- Football sits behind swimming and cycling amongst adults
- Football is the most popular sport among children, having improved since 2016
- Still room for improvement, especially among women. Need to make football more accessible

Women's football

- Ranked 8th for interest but ahead of the European benchmark
- Masculine perceptions
- Lack of media coverage is a barrier
- PZPN need to raise the game's profile, make it easier to play and promote top Polish female players



Image

- PZPN's image has improved since 2016
- But: over half the population don't understand the PZPN's role
- PZPN should develop a clear communication strategy to better promote grassroots football and ensure these initiatives are linked with the PZPN to build the awareness

Engagement

- Website, Facebook and YouTube the strongest communication channels for PZPN
- Opportunity to utilise these better to promote PZPN's good work
- Appetite amongst fans for 10min long video highlights



Executive Summary

 Key findings	 Recommendations
<p>Sports interest & football following</p> <p>Football remains the most followed sport in Poland, increasing by 7% since 2016. Men dominate this interest, however, compared with the European benchmark (35%), there are a higher number of women following football in Poland – 63%. The number of female followers has increased by 10% since 2016 (53%), identifying a driver in interest along with the age groups 25-34 year olds (+16%) and 35-44 year olds (+12%).</p> <p>Just 12% of people have no interest in men’s football at all, which is noticeably lower than the European benchmark (24%). Non-football fans cite boredom and poor quality as the main reason for limiting their interest in the sport. Image wise, football ranks 6th behind athletics, volleyball, skiing, swimming and tennis but it is notable that its positive image has increased by 5% since 2016.</p>	<p>The ongoing UEFA EURO 2020 qualifiers, where Poland currently top their group, are a great way to maintain the football momentum in the country, especially to capitalise on the strong female interest around major tournaments. The PZPN need to draw public attention to the national teams and build the excitement through the carefully prepared media campaigns.</p>
<p>Participation - adults</p> <p>Adult football participants has increased by 4% since 2016 and remains above the European benchmark. However, over 40% respondents identify as being former players. The most prevalent reason, and well above the European benchmark, for men having stopped playing is due to friends no longer participating.</p> <p>Football (18%) sits behind swimming (27%) and cycling (21%) for adult participation. There’s a big skew amongst adults with 30% of men and merely 7% of women playing football. However, football leads the way amongst children (48%) with a +20% increase since 2016.</p>	<p>While the adult football participation has increased, there’s still room for improvement, especially to get more women involved. The PZPN should emphasize overall health and fitness benefits of the sports. At the same time there’s a need to increase the opportunities to play as every fifth respondent cited the above as a barrier, thus the PZPN should create initiatives that would be aimed at adults as much as children, which have already proved successful.</p>

Executive Summary



 Key findings	 Recommendations
<p>Participation - children</p> <p>Child football participation has increased by +20% since 2016 and is now the most popular sport amongst children (48%), ahead of swimming (32%) and basketball (21%). 76% of children have played football at some point and over half of those are currently playing ,which is a very encouraging rate of retention.</p> <p>Positive parental attitudes are also contributing to the increase football participation amongst children. The figures for letting children play, watch on TV and go to football matches have all increased since 2016 and are well above the European benchmark.</p>	<p>A combination of PZPN’s initiatives could be the driving force behind increasing children’s football participation, including: the continued growth of the Z Podwórka na Stadion o Puchar Tymbarku tournament, the opening of 25 new Young Eagle’s academies between 2015-2017, in addition to expanding the inclusion of more age categories in its Central Youth League in 2017. The momentum needs to be maintained to ensure children play football and carry it with them into adulthood.</p>
<p>Women’s football</p> <p>Overall, interest in women's sports is well over the European benchmark. Football ranks 8th with 14%, but is a long way off volleyball (41%), athletics (36%) and tennis (27%). Amongst those who do follow women’s football, most classify themselves as being more interested around major tournaments or being fans that don’t attend matches.</p> <p>A third of women not playing football believe that women’s football is masculine, which in turn restricts the interest. Lack of media coverage and players to look up to are the main barriers amongst both men and women. Furthermore, lack of opportunities (friends stopped and no local team) is the main reason amongst former female players for stopping playing.</p>	<p>There’s an opportunity to convert those interested in women’s football into match-attending fans. The PZPN should raise awareness of local teams to make it easier, for those interested in playing, to find others to play with. There’s also a need to increase media coverage and boost the women’s game profile, which could be achieved by promoting best female players, such as Ewa Pajor who was a top goal-scorer in Frauen Bundesliga last season.</p>

Executive Summary

 Key findings	 Recommendations
<p>Image</p> <p>59% of respondents have a positive image of the PZPN, which has improved since 2016 by 23% and is strongest amongst football fans (69%) and current football players (74%). Associations of PZPN with more positive connotations such as trustworthy, respectable and responsible have all increased since 2016, whilst its association with 'out of touch' has declined by 8%.</p> <p>However, over half of the respondents (51%) don't have the clear understanding of what the association does and what its responsibilities are. There also seems to be confusion as what its main source of financing is. Furthermore, The PZPN scores below the European benchmark for associations with youth and grassroots football.</p>	<p>The good work in the last years is clearly paying off, however there still is a group of people who have not been convinced that PZPN has been fully modernised. PZPN scores lower than other sporting federations and those who have a bad perception tend to still associate it with corruption, money and insufficient grassroots development. Thus, the PZPN should look at ways to further promote its great work, either locally or in the national media, so that the whole population can see the recent improvements. Furthermore, the PZPN should investigate developing a clear communication strategy to better promote grassroots football initiatives.</p>
<p>Engagement</p> <p>PZPN channels: Łączy nas piłka's website, Facebook and YouTube are particularly popular, all of which score above the European benchmark, sources of news for football fans. Two third (63%) of those consuming football online, use Facebook at least 3 time a week, which highlights the importance of this medium as a source of football news as well as news about the PZPN itself and its activities.</p> <p>Although football news / articles (33%) are the most sought after pieces of digital sports content, they score much lower than the European benchmark (47%). There's a particular appetite for video highlights up to 10min (32%) compared to the European benchmark.</p>	<p>With its heavy set of communication channels, the PZPN needs to emphasize its website, YouTube and especially Facebook, which is the preferred way for the fans to receive the news. Furthermore, Facebook's widespread usage, gives PZPN a chance to further promote its work and enhance the reputation.</p>

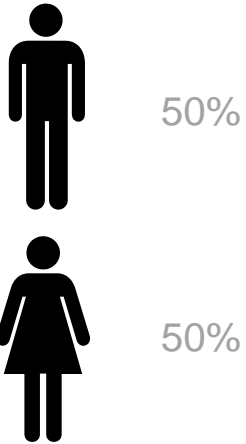
Objectives, Methodology and sampling

Executive Summary

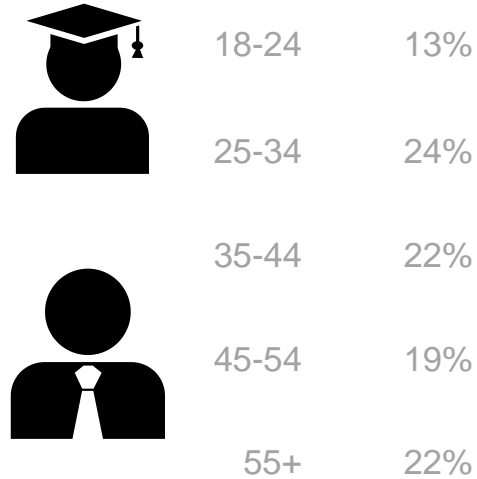
 Objectives	 Methodology
<ul style="list-style-type: none">• To get an overview of the attitudes towards football in Poland (including the national association, the national team, women's football, domestic competitions and grassroots)• To get a clear picture on how football ranks compared to other sports and entities• To understand the reasons for the current status of football in Poland• To identify areas to be addressed in future marketing & organisational planning in order to improve the image of football in Poland	<ul style="list-style-type: none">• 20 mins survey• 1000 interviews• Interviews conducted in Polish• Conducted online• Fieldwork period: 12th – 18th June 2019• Fieldwork period: 14th – 21st December 2016

Sampling

Gender



Age



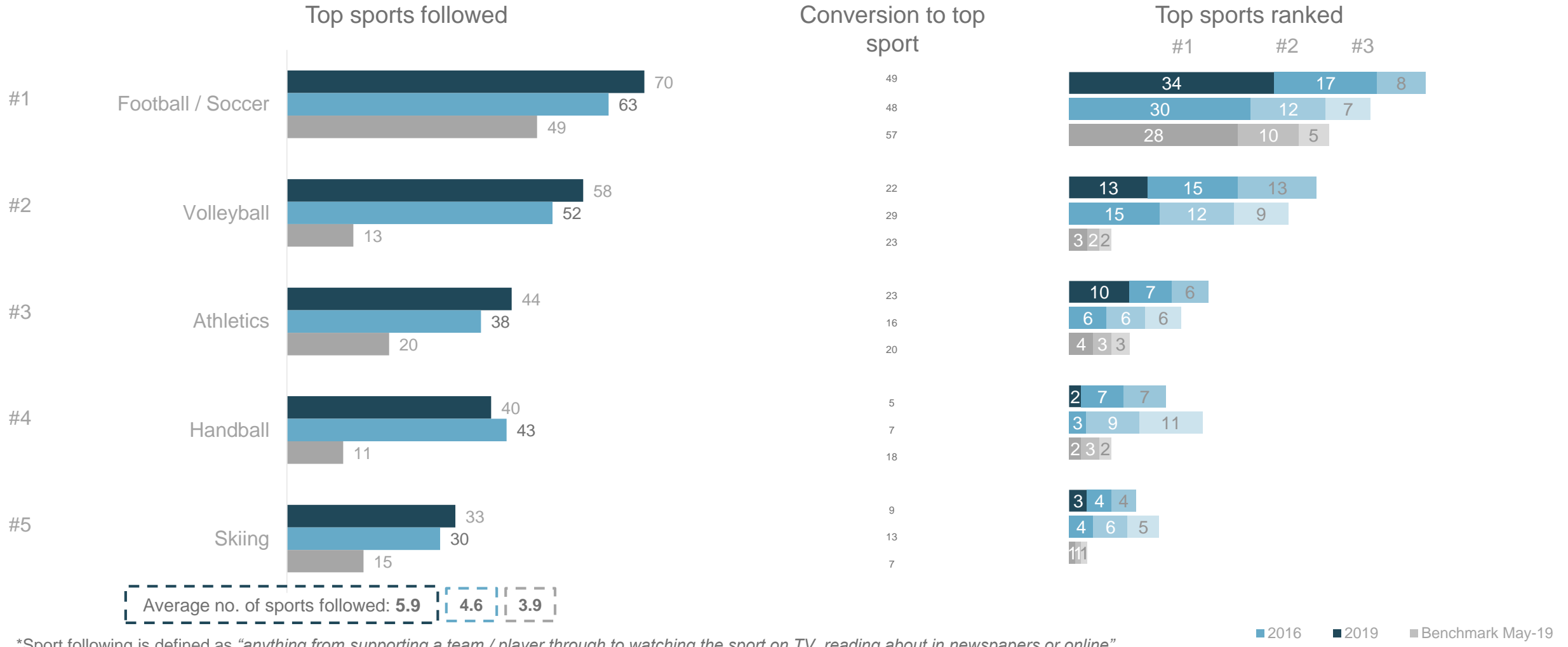
Region



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

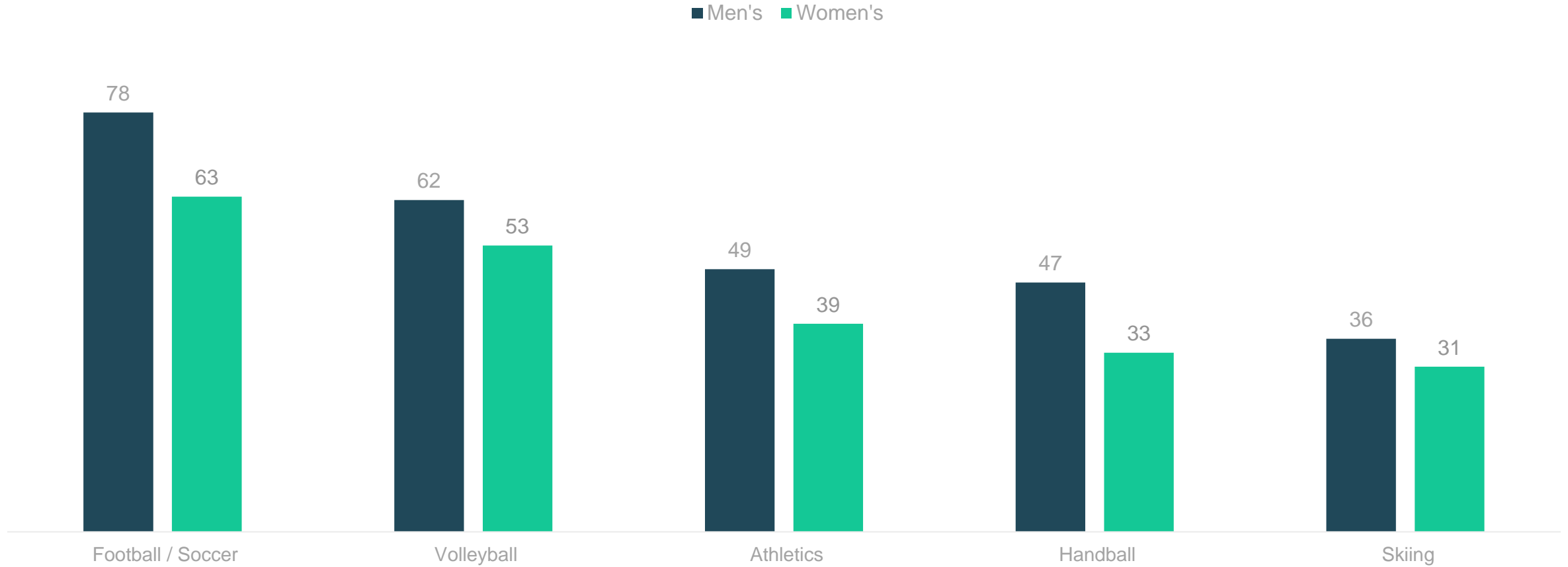
Sports Interest

Sports interest (%)

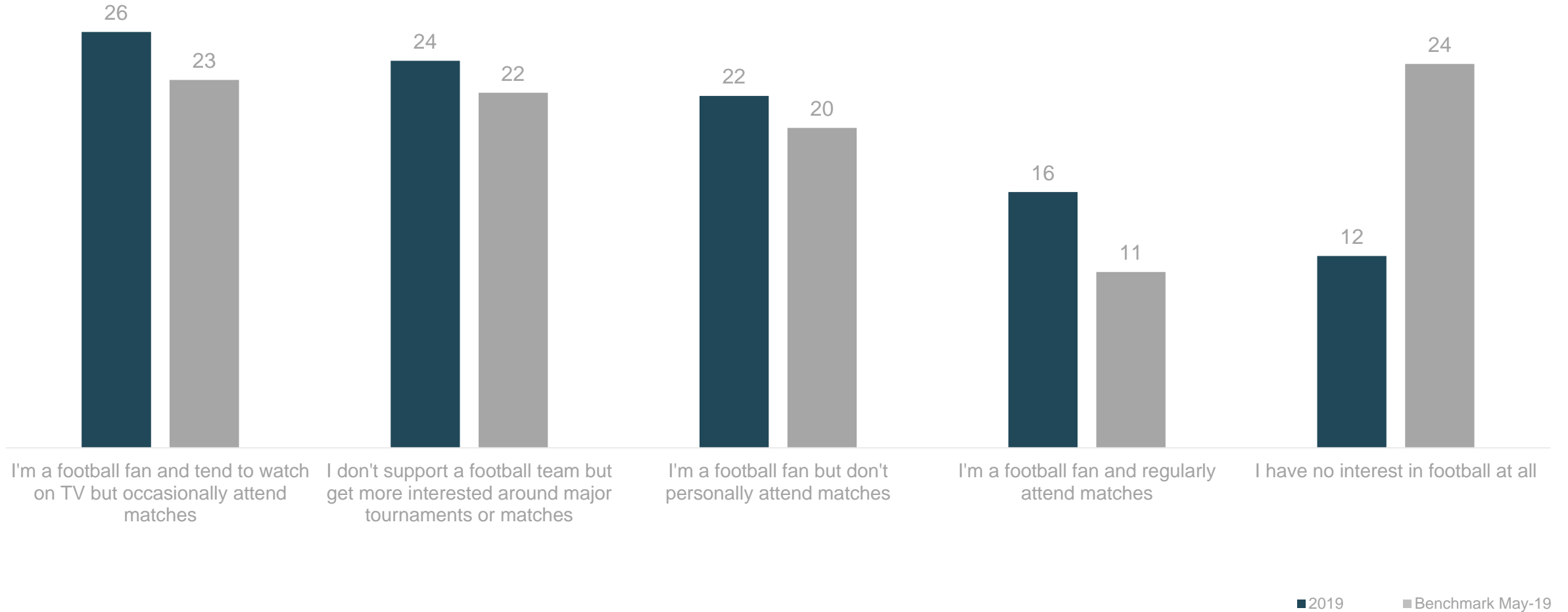


*Sport following is defined as "anything from supporting a team / player through to watching the sport on TV, reading about in newspapers or online"

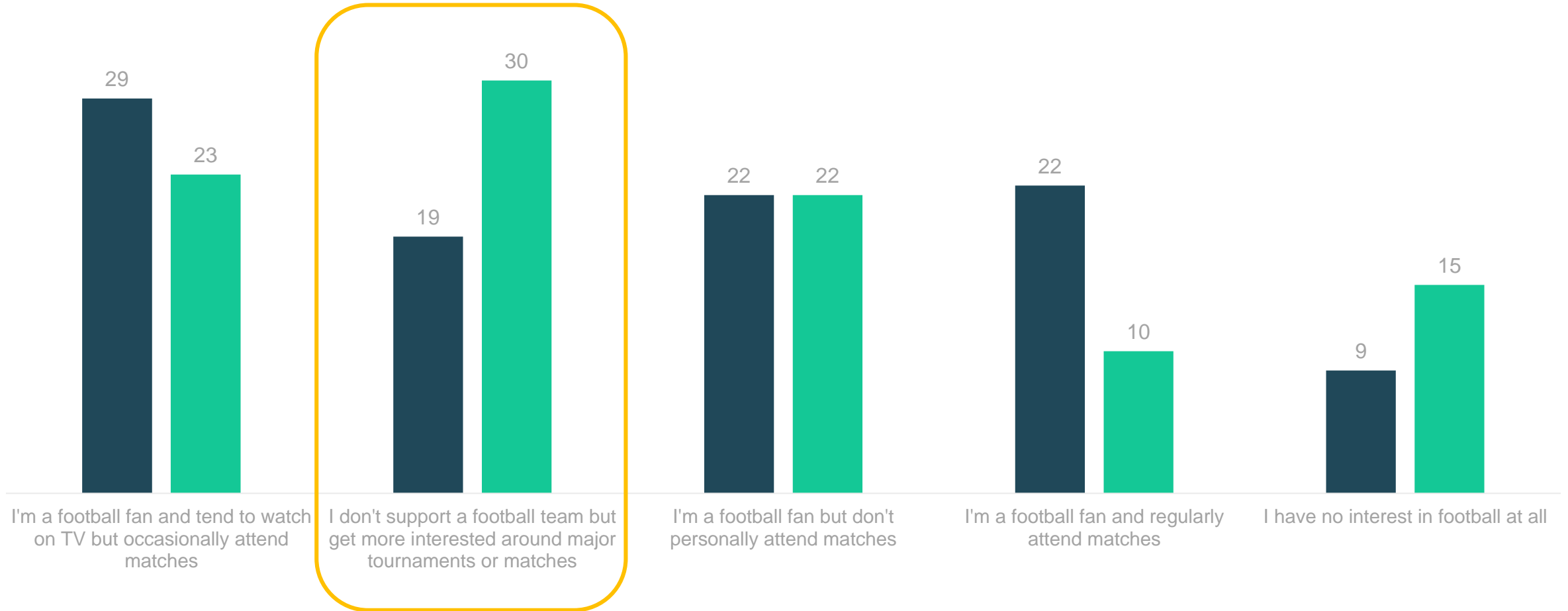
Sports interest – male vs female (%)



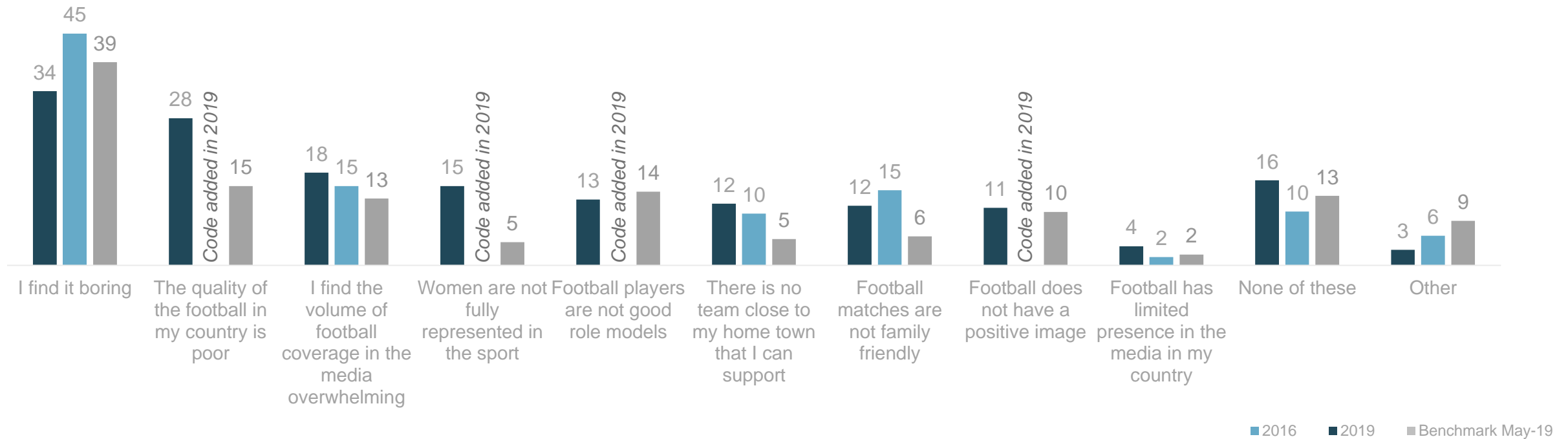
Types of men's football fan (%)



Types of men's football fan – male vs female (%)



Reasons for a lack of interest in football (%)



Sports image (%)



■ 2016 ■ 2019 ■ Benchmark May-19

Sport Interest – Key takeouts and potential actions



Football remains the most followed sport in Poland, increasing by 7% since 2016. Men dominate this interest, however, compared with the European benchmark (35%), there are a higher number of women following football in Poland – 63%. The number of female followers has increased by 10% since 2016 (53%), identifying a driver in interest along with the age groups 25-34 year olds (+16%) and 35-44 year olds (+12%).



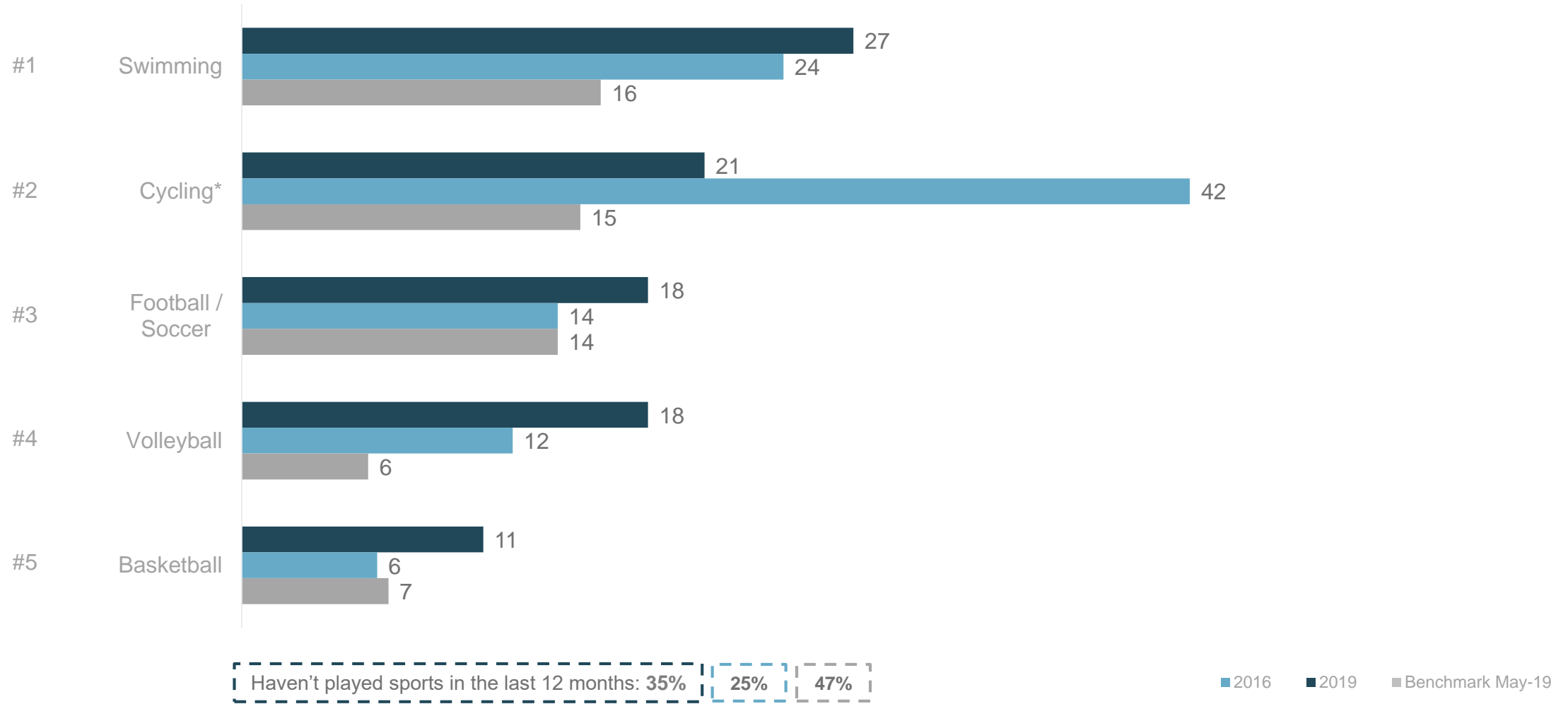
Just 12% of people have no interest in men's football at all, which is noticeably lower than the European benchmark (24%). Non-football fans cite boredom and poor quality as the main reason for limiting their interest in the sport. Image wise, football ranks 6th behind athletics, volleyball, skiing, swimming and tennis but it is notable that its positive image has increased by 5% since 2016.



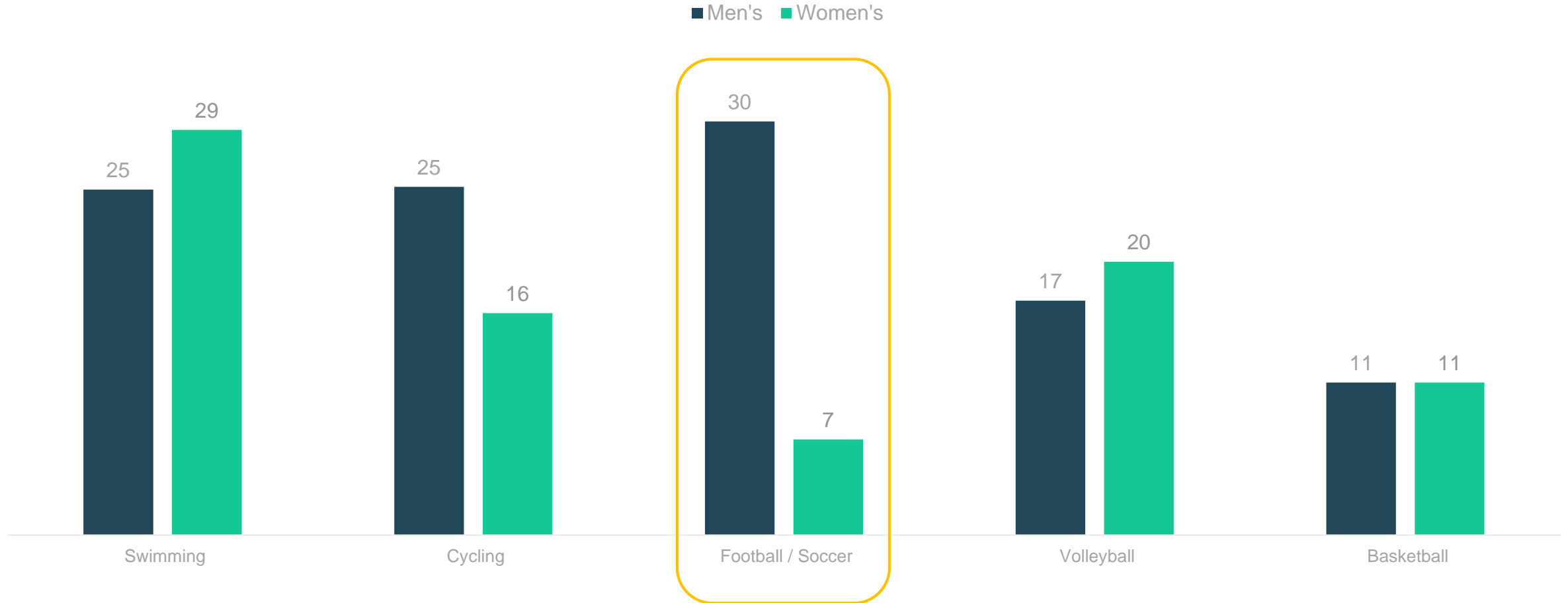
The ongoing UEFA EURO 2020 qualifiers, where Poland currently top their group, are a great way to maintain the football momentum in the country, especially to capitalise on the strong female interest around major tournaments. The PZPN need to draw public attention to the national teams and build the excitement through the carefully prepared media campaigns.

Adult Participation

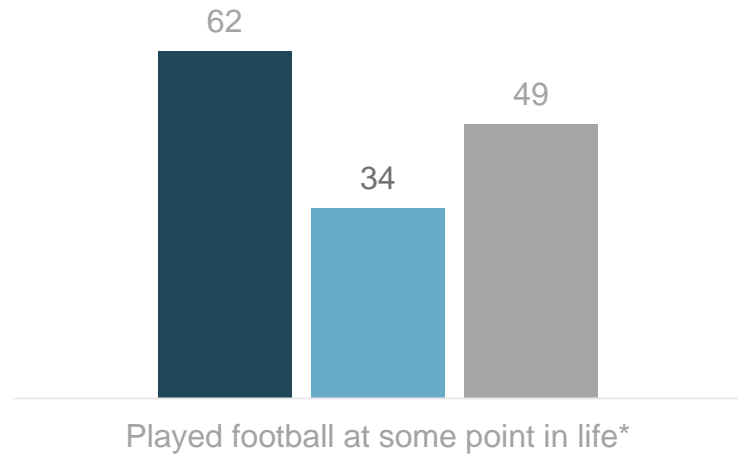
Sports participation (%)



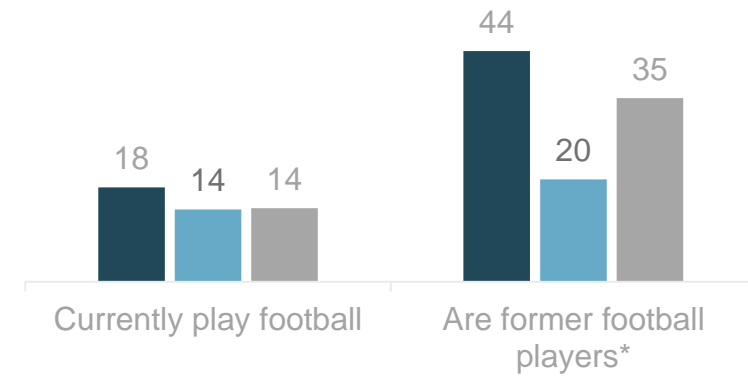
Sports participation – male vs female (%)



Participation in football (%)



Of those that play...

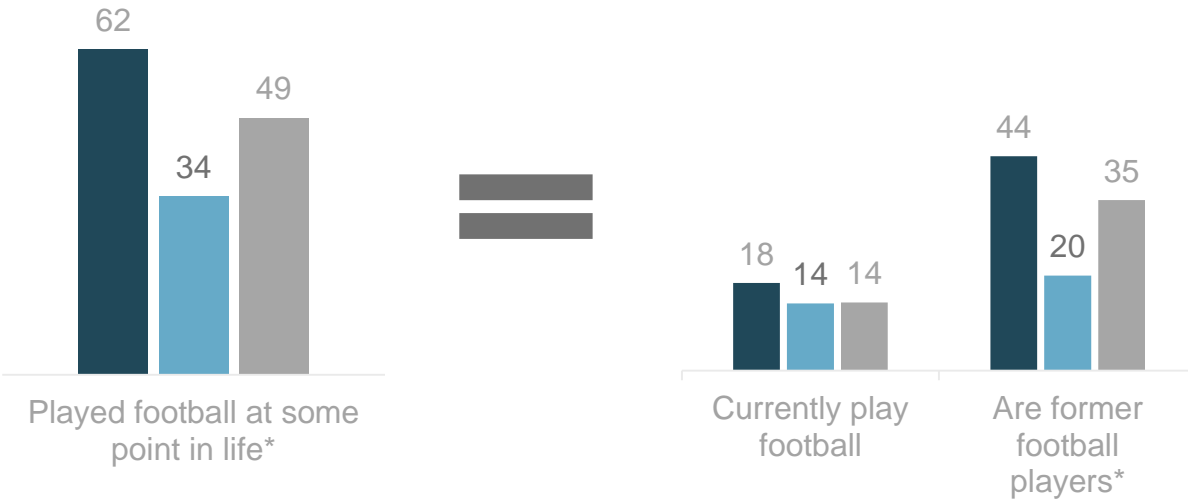
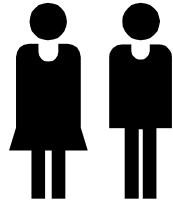


*The benchmark figure reported reflects the most up-to-date version of this question (updated in 2018)

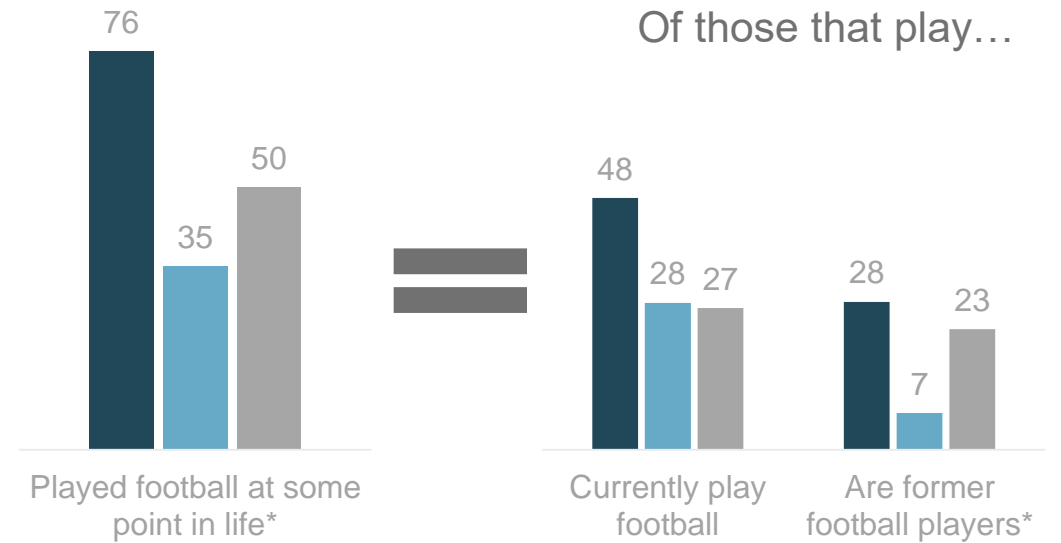
■ 2016 ■ 2019 ■ Benchmark May-19

Participation in football (%)

Among adults

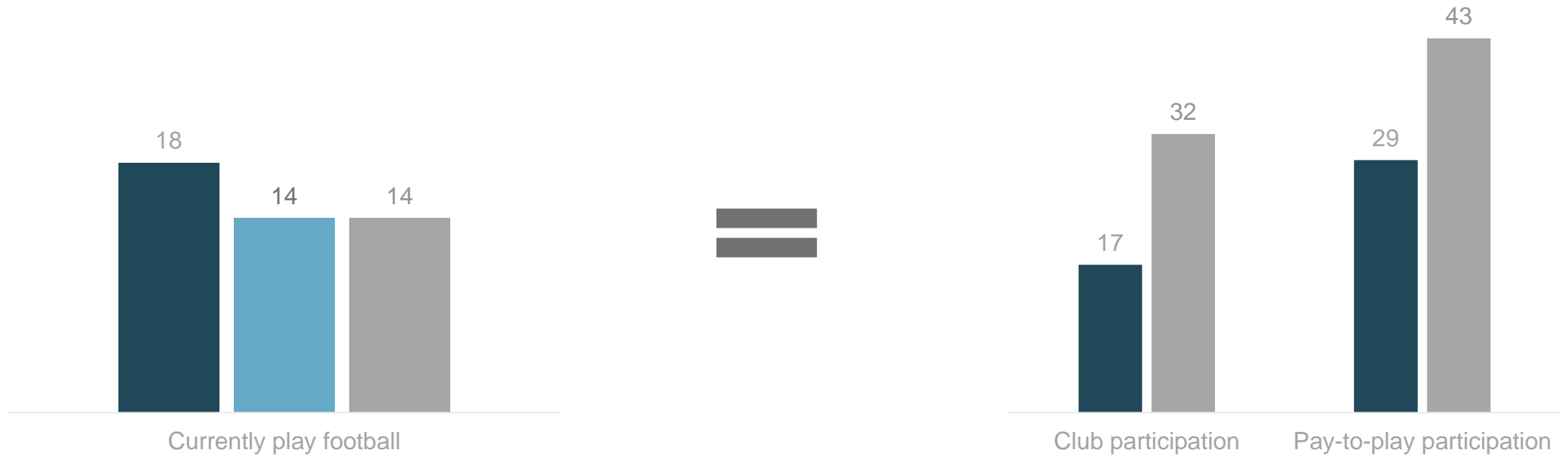


Among children



■ 2016 ■ 2019 ■ Benchmark May-19

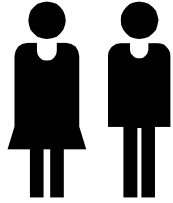
Club and pay-to-play football participation (%)



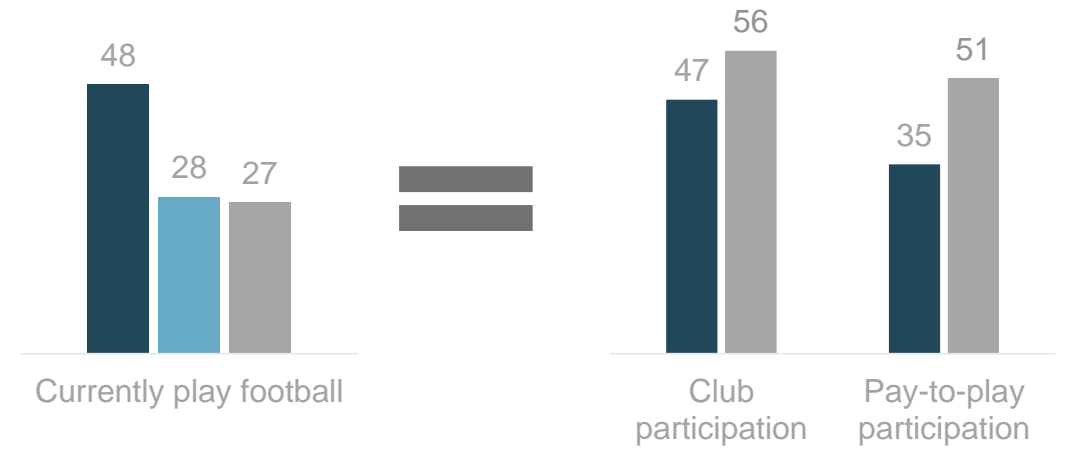
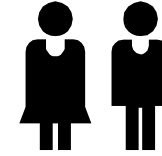
■ 2016 ■ 2019 ■ Benchmark May-19

Club and pay-to-play football participation (%)

Among adults



Among children

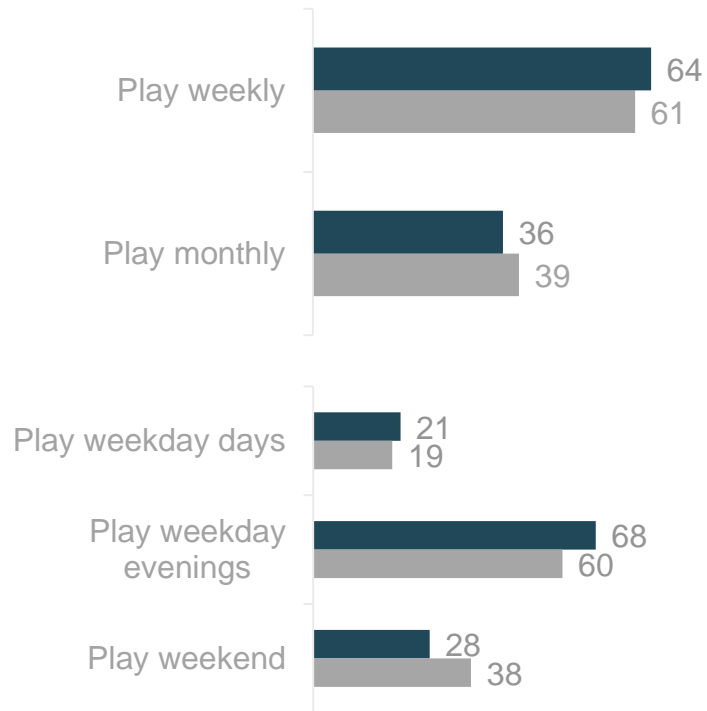


■ 2016 ■ 2019 ■ Benchmark May-19

Type, frequency and time of football participation (%)

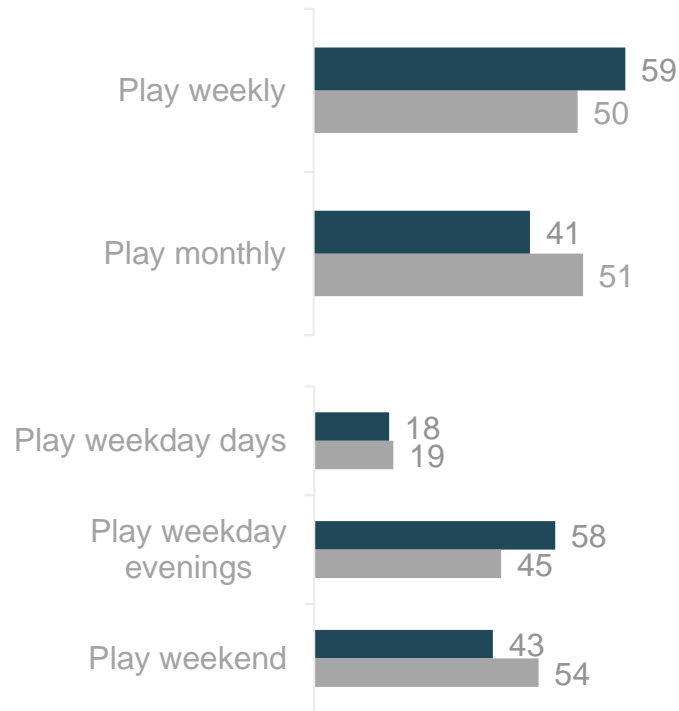
49% of people who play football play **Indoor Small-Sided Football**

44%



71% of people who play football play **Outdoor Small-Sided Football**

58%



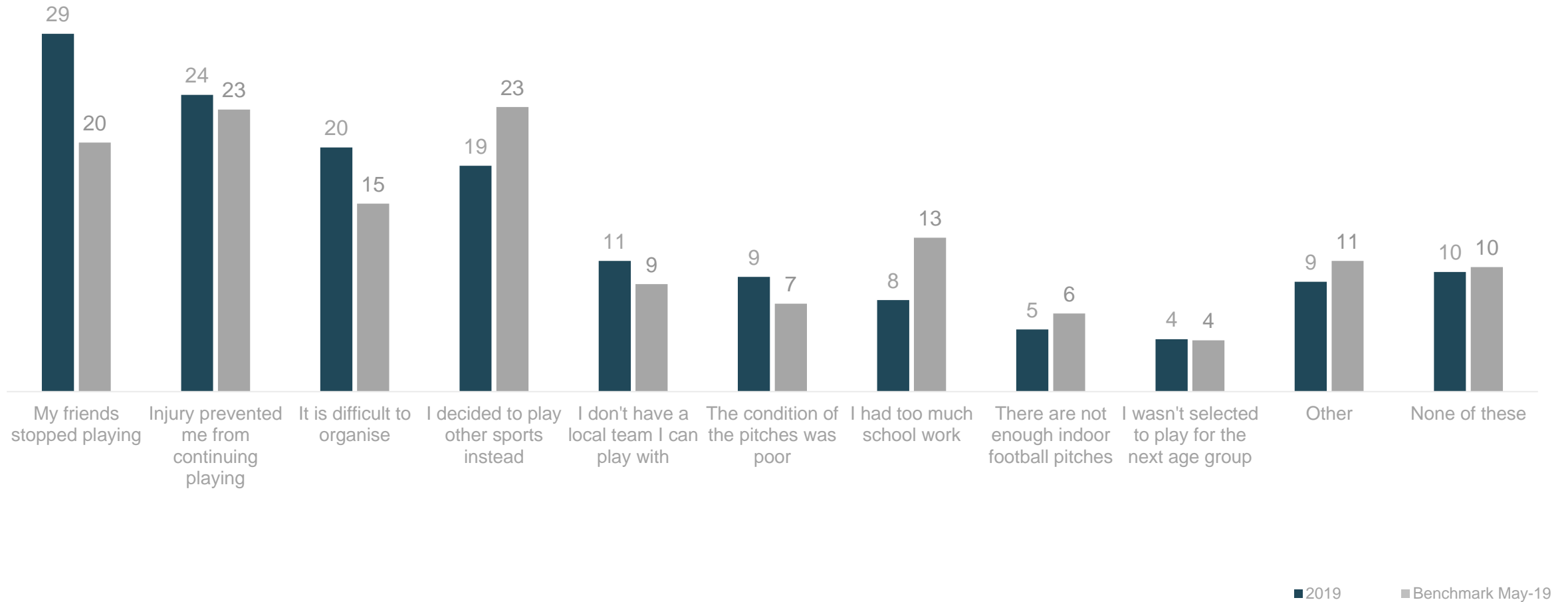
21% of people who play football play **Outdoor 11-a-side Football**

28%

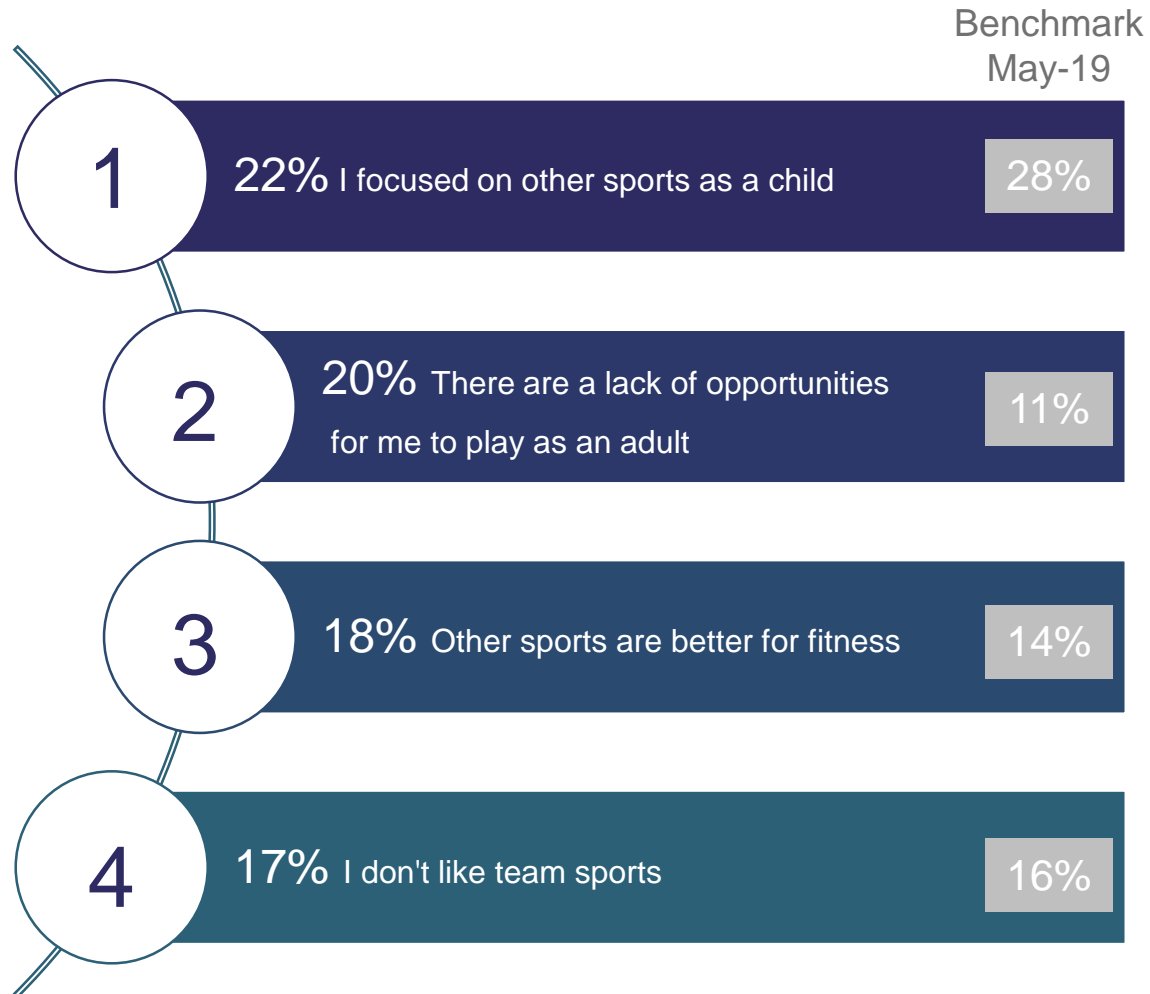
Base too low to report

■ 2019 ■ Benchmark May-19

Reasons men stopped playing football (%)

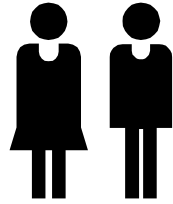


Barriers to football participation among men (%)

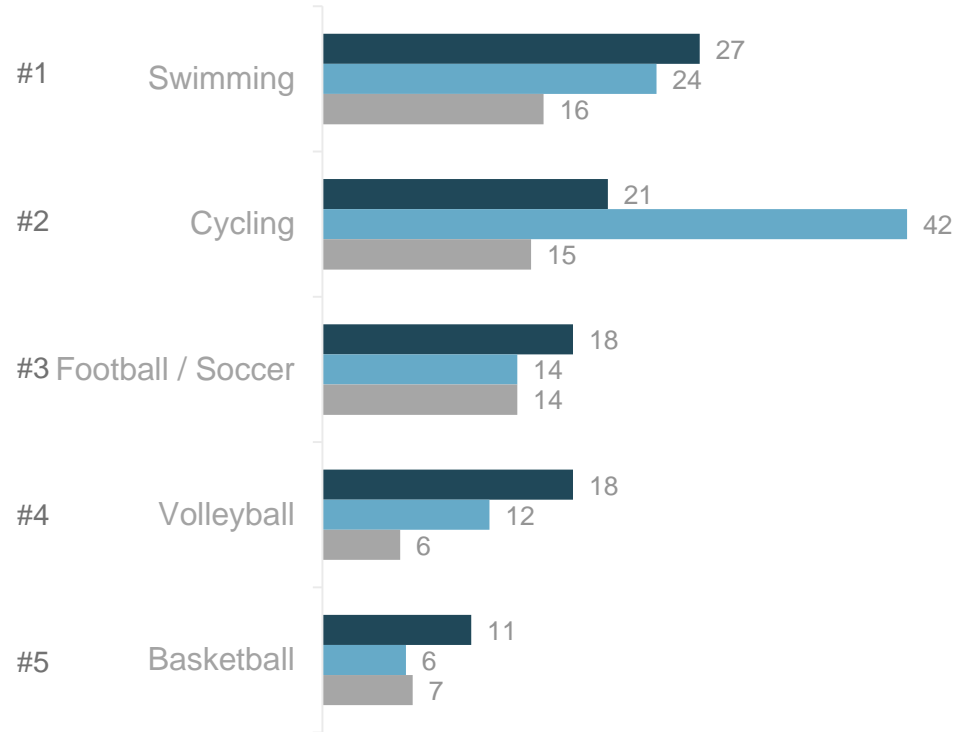


■ 2016 ■ 2019 ■ Benchmark May-19

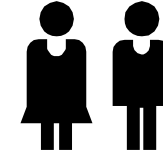
Sports participation (%)



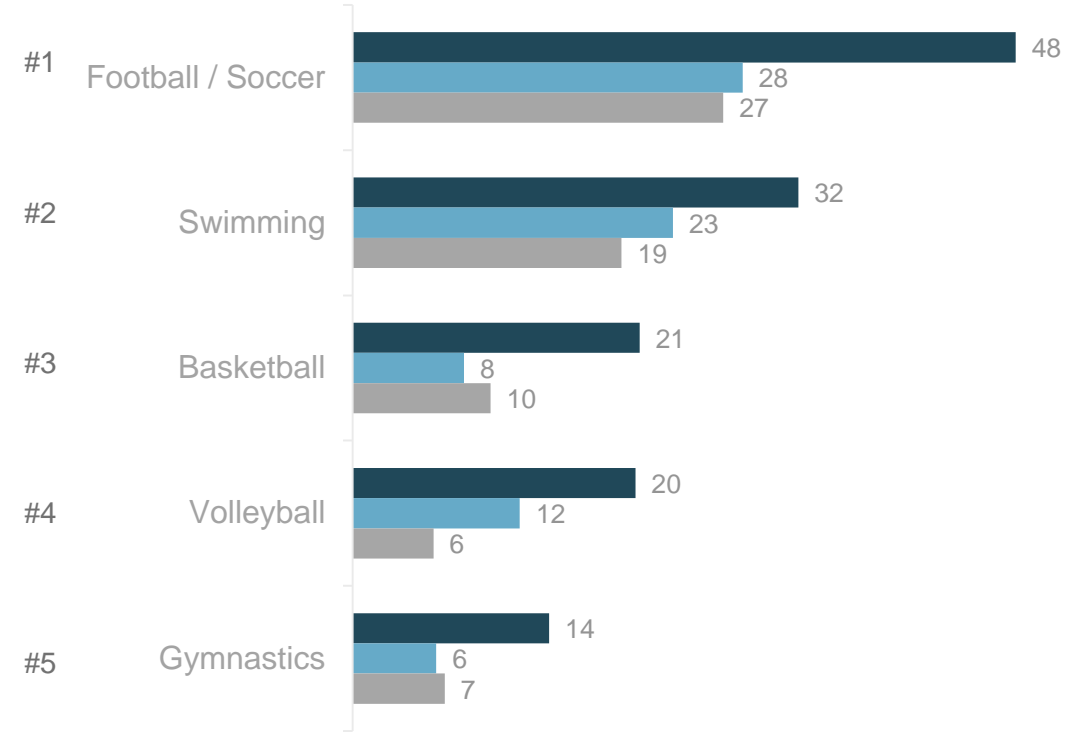
Among adults



Haven't played sports in the last 12 months: 35% | 25% | 47%



Among children



Haven't played sports in the last 12 months: 19% | 27% | 37%

■ 2016 ■ 2019 ■ Benchmark May-19

Adult participation – Key takeouts and potential actions



Adult football participants has increased by 4% since 2016 and remains above the European benchmark. However, over 40% respondents identify as being former players. The most prevalent reason and well above the European benchmark, for men having stopped playing is due to friends no longer participating.



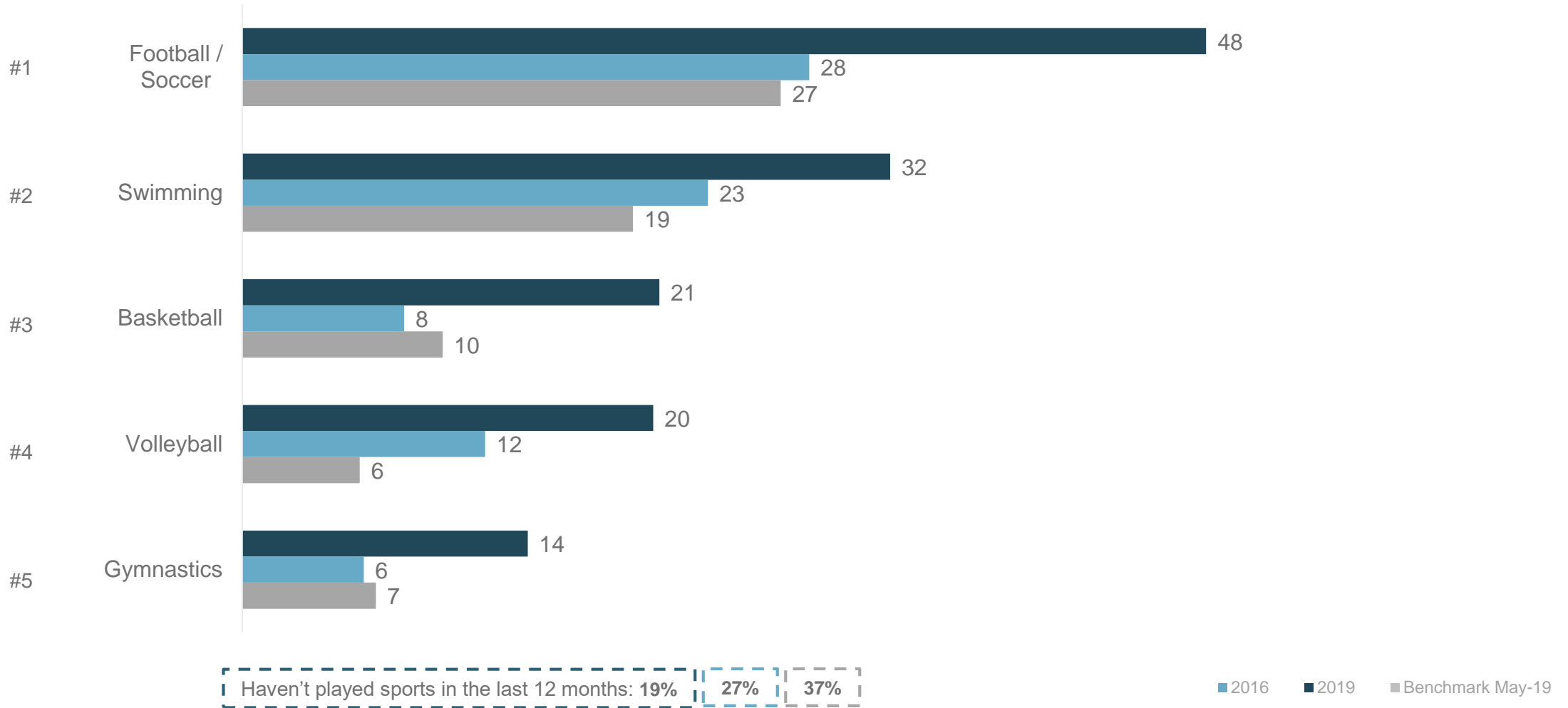
Football (18%) sits behind swimming (27%) and cycling (21%) for adult participation. There's a big skew amongst adults with 30% of men and merely 7% of women playing football. However, football leads the way amongst children (48%) with a +20% increase since 2016.



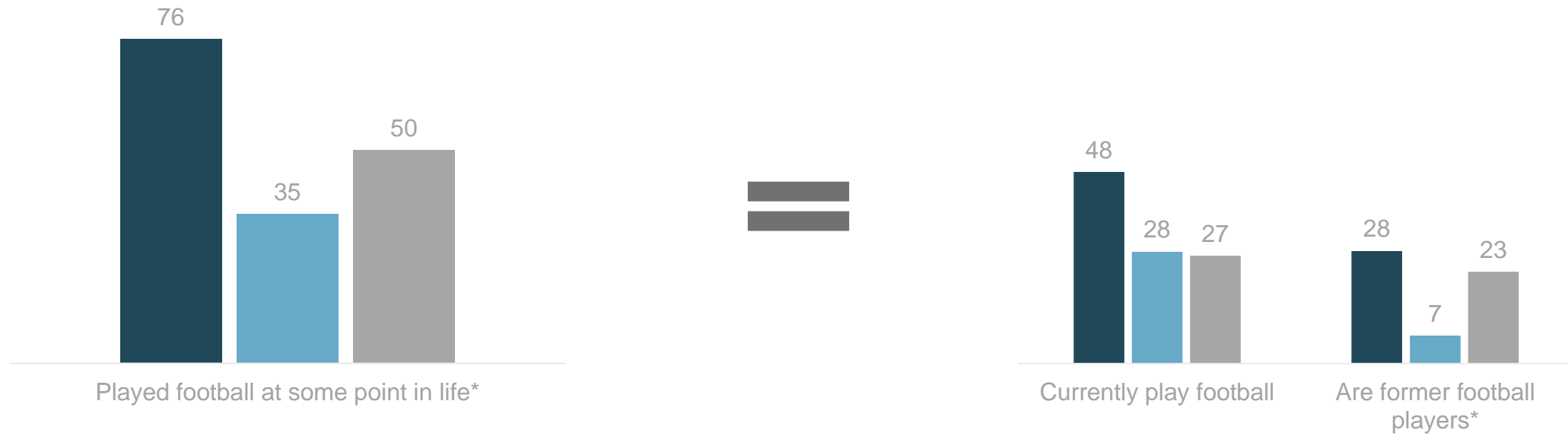
While the adult football participation has increased, there's still room for improvement, especially to get more women involved. The PZPN should emphasize overall health and fitness benefits of the sports. At the same time there's a need to increase the opportunities to play as every fifth respondent cited the above as a barrier, thus the PZPN should create initiatives that would be aimed at adults as much as children, which have already proved successful.

Children's Participation

Sports participation (%)



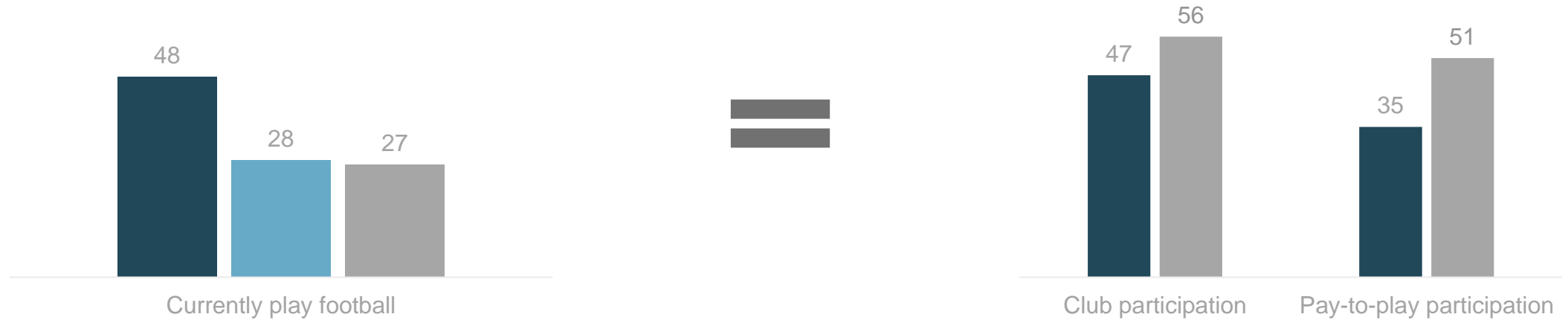
Participation in football (%)



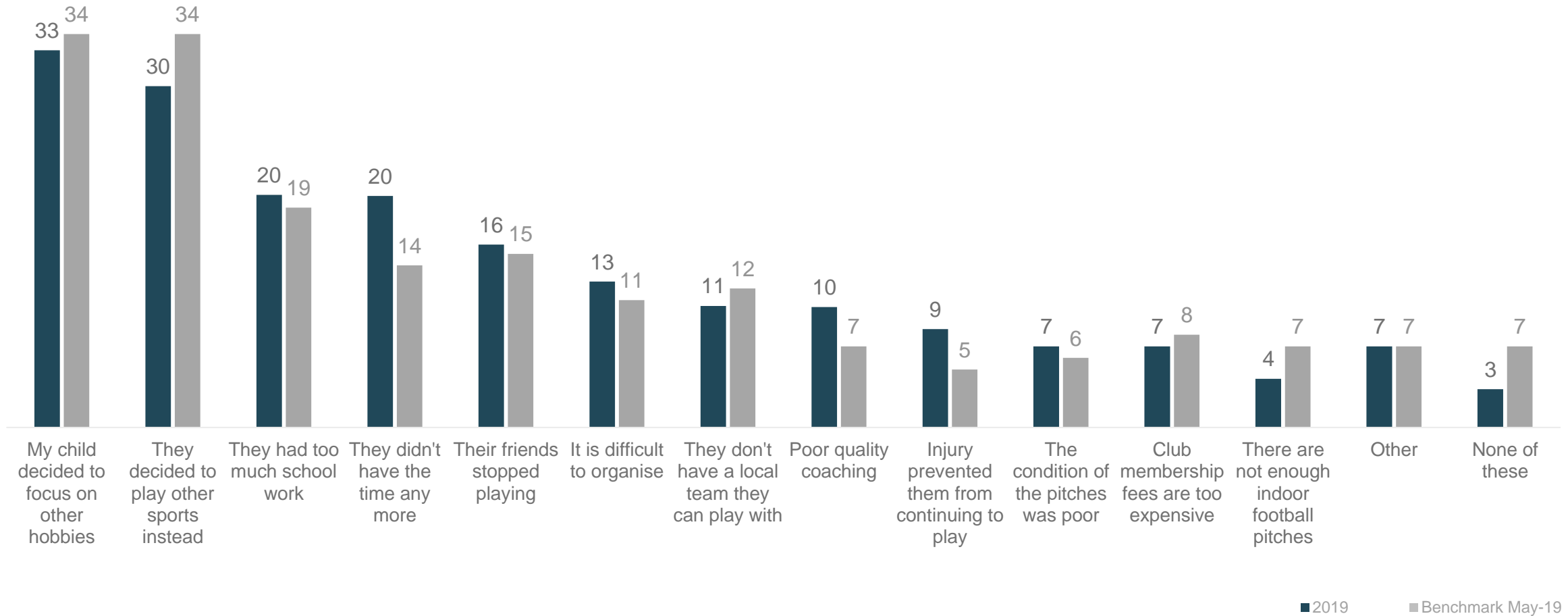
*The benchmark figure reported reflects the most up-to-date version of this question (updated in 2018)

■ 2016 ■ 2019 ■ Benchmark May-19

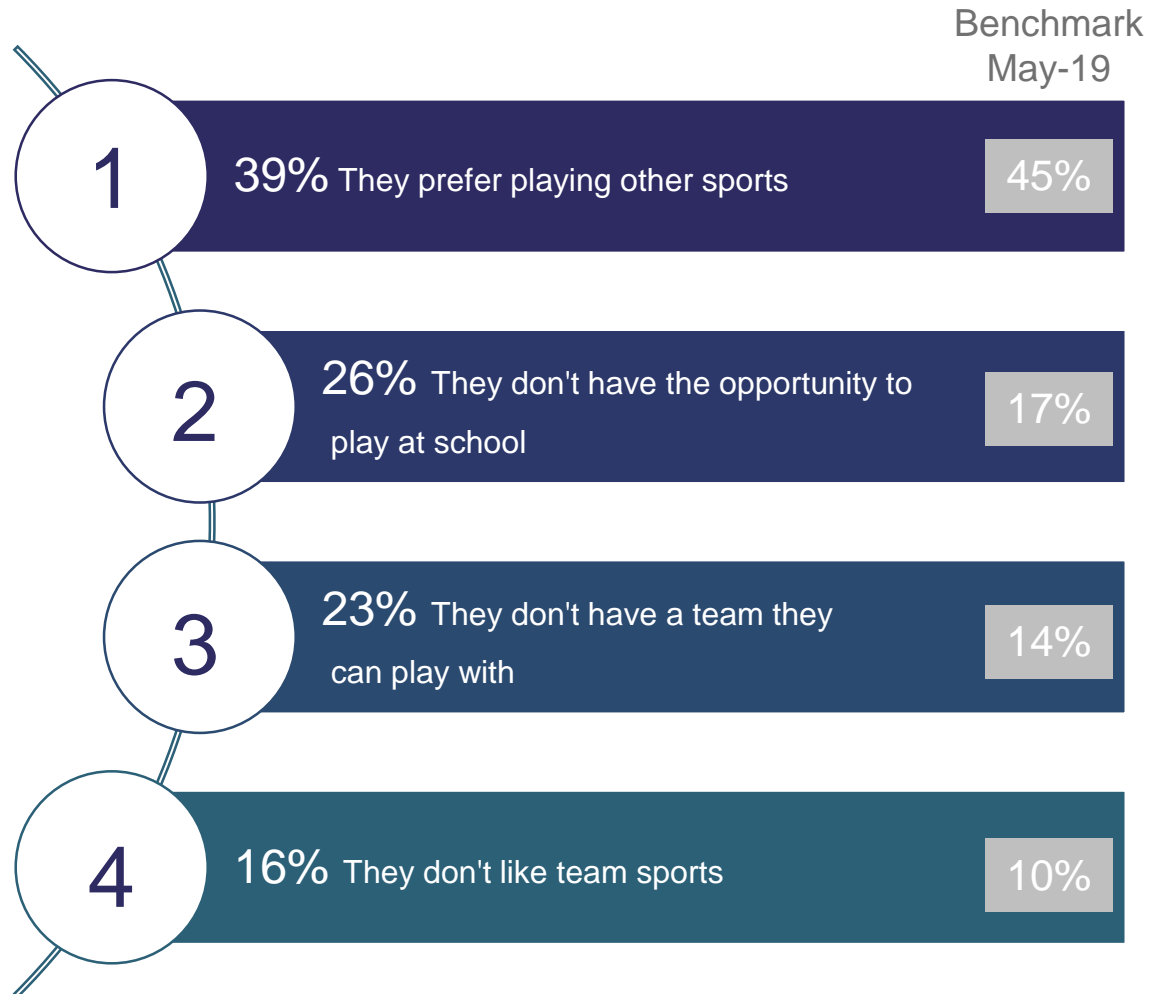
Club and pay-to-play football participation (%)



Reasons children stopped playing football (%)



Barriers to football participation (%)



■ 2019

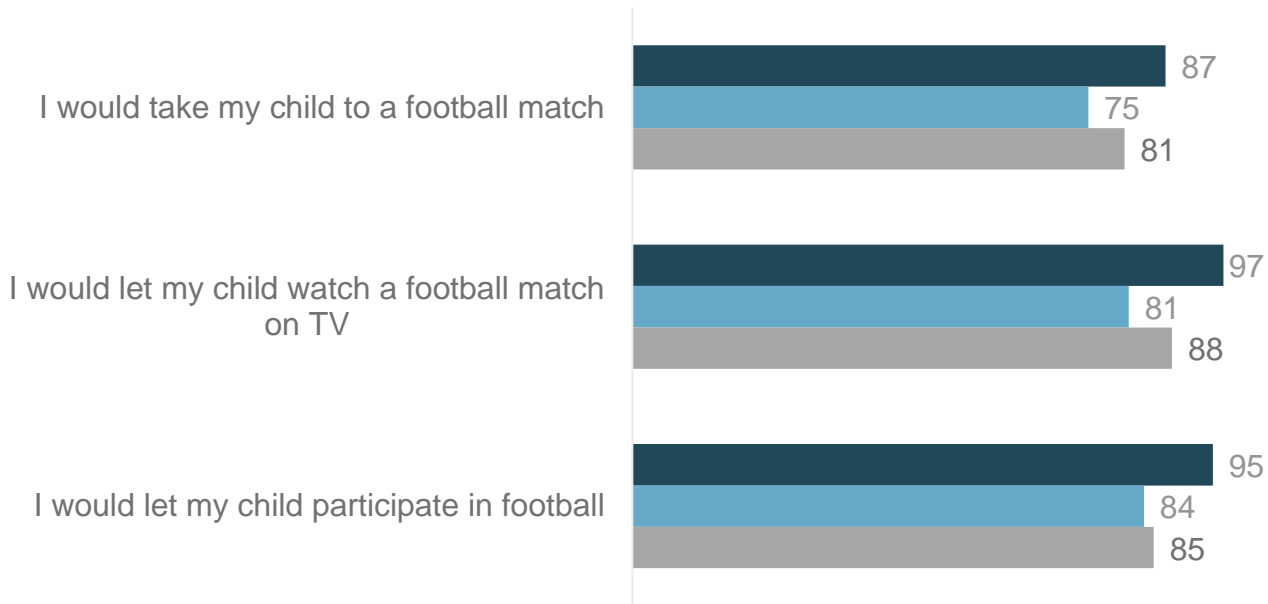
■ Benchmark May-19

Attitudes to children's involvement in football (%)

Proportion of parents with a positive image: 63%

43%

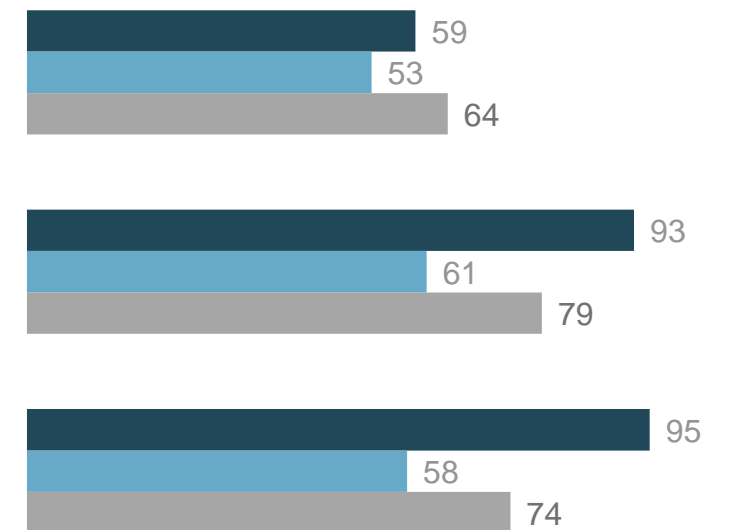
Those who believe National Association has a positive image:



Proportion of parents with a negative image: 22%

33%

Those who believe National Association has a negative image:



■ 2016 ■ 2019 ■ Benchmark May-19

Children's participation – Key takeouts and potential actions



Child football participation has increased +20% since 2016 and is now the most popular sport amongst children (48%), ahead of swimming (32%) and basketball (21%). 76% of children have played football at some point and over half of those are currently playing, which is a very encouraging rate of retention.



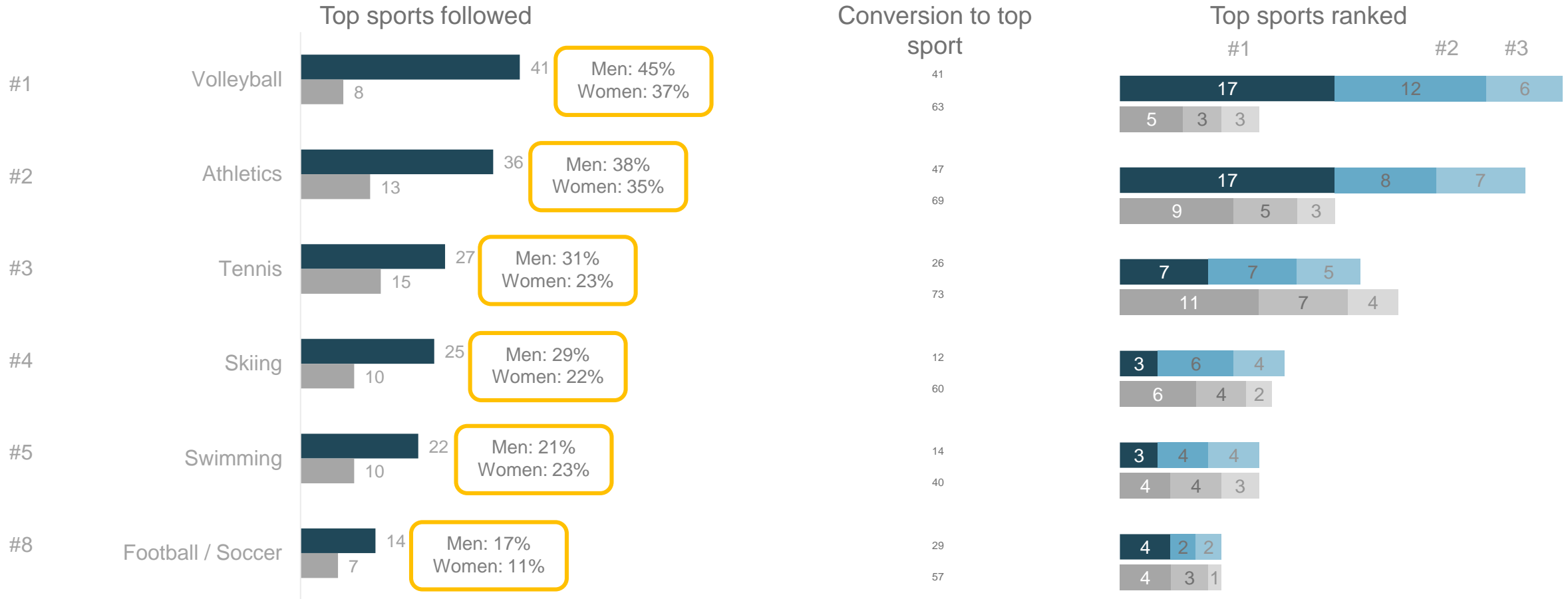
Positive parental attitudes are also contributing to the increase football participation amongst children. The figures for letting children play, watch on TV and go to football matches have all increased since 2016 and are well above the European benchmark.



A combination of PZPN's initiatives could be the driving force behind increasing children's football participation, including: the continued growth of the Z Podwórka na Stadion o Puchar Tymbarku tournament, the opening of 25 new Young Eagle's academies between 2015-2017, in addition to expanding the inclusion of more age categories in its Central Youth League in 2017. The momentum needs to be maintained to ensure children play football and carry it with them into adulthood.

Women's Sport

Sports interest (%)

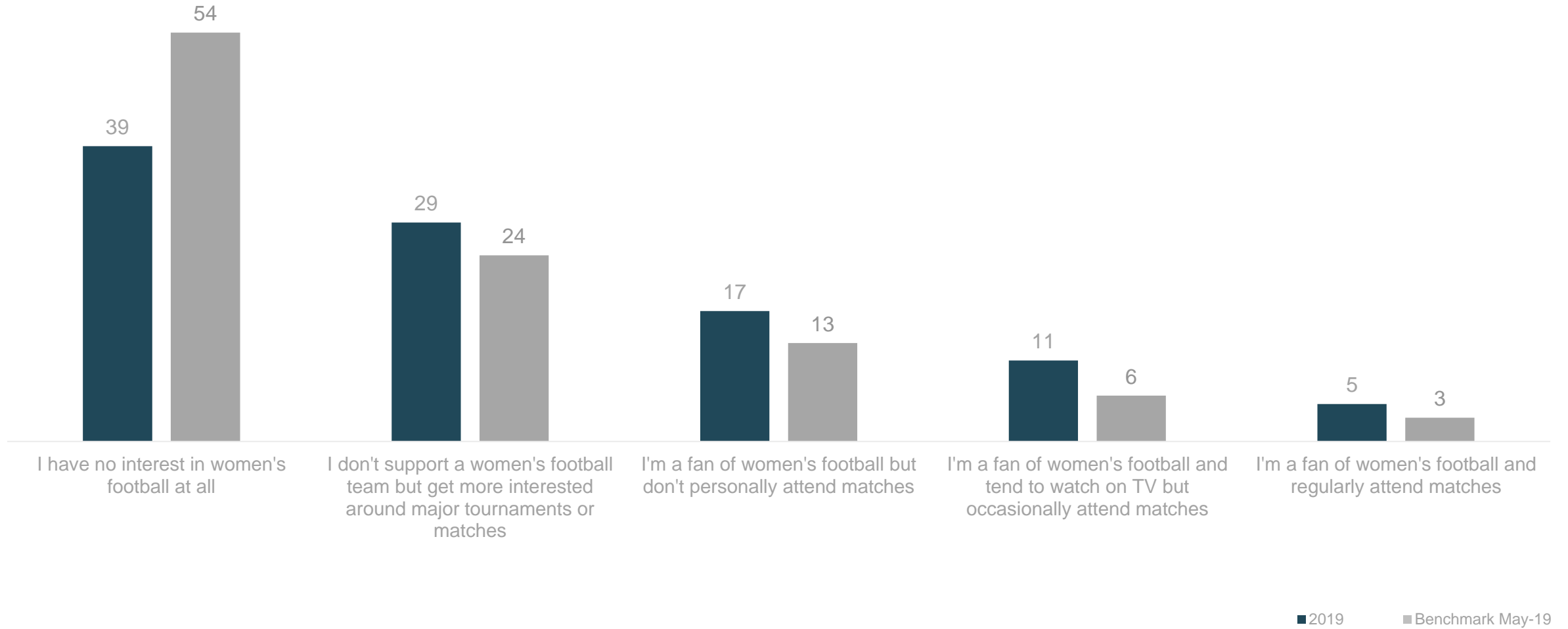


*Interest is defined as “interest in women’s competitions” and “interest in both men and women’s competitions”

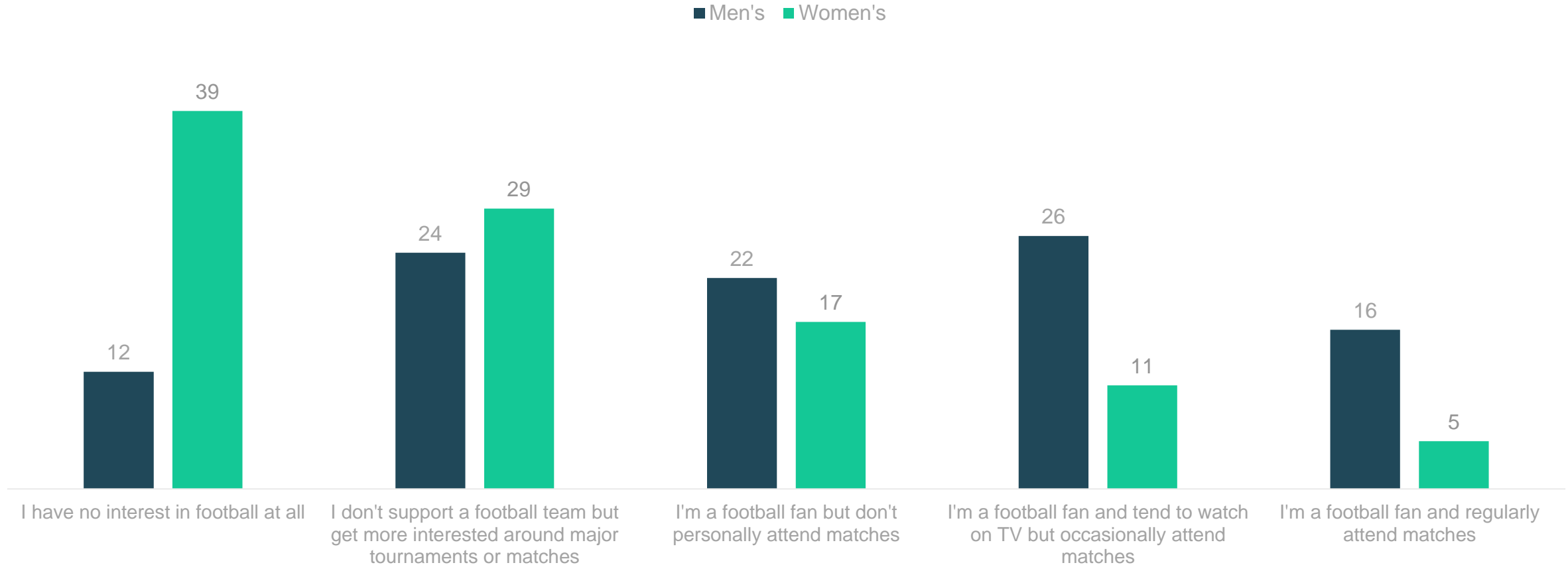
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■ 2019 ■ Benchmark May-19

Types of women's football fan (%)



Types of men's vs. women's football fan (%)



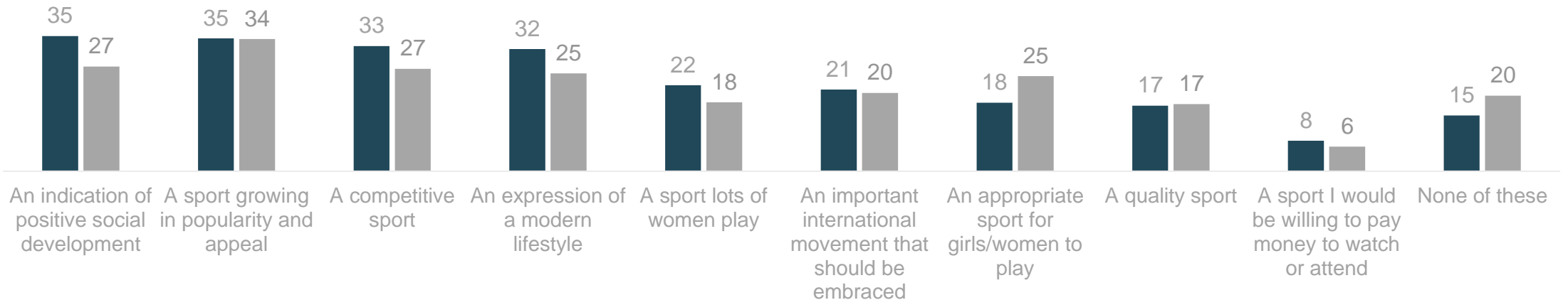
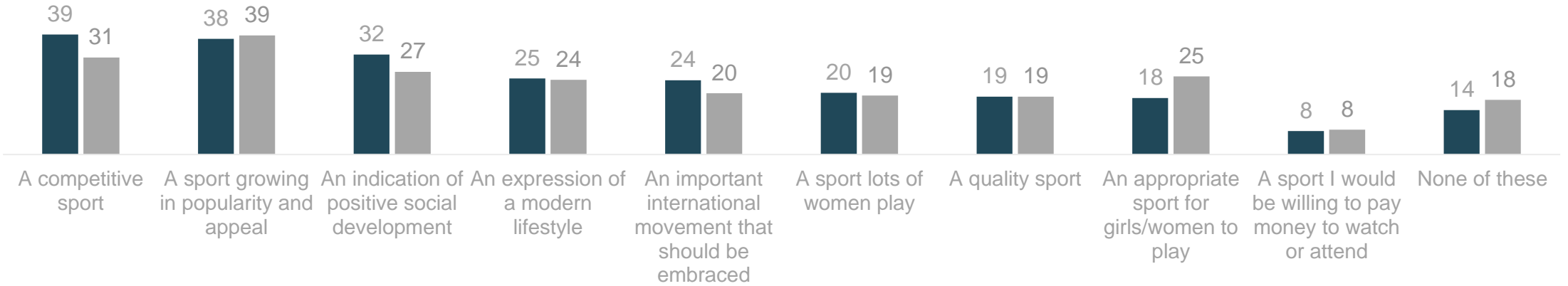
Participation in football among men and women (%)



*The benchmark figure reported reflects the most up-to-date version of this question (updated in 2018)

■ 2016 ■ 2019 ■ Benchmark May-19

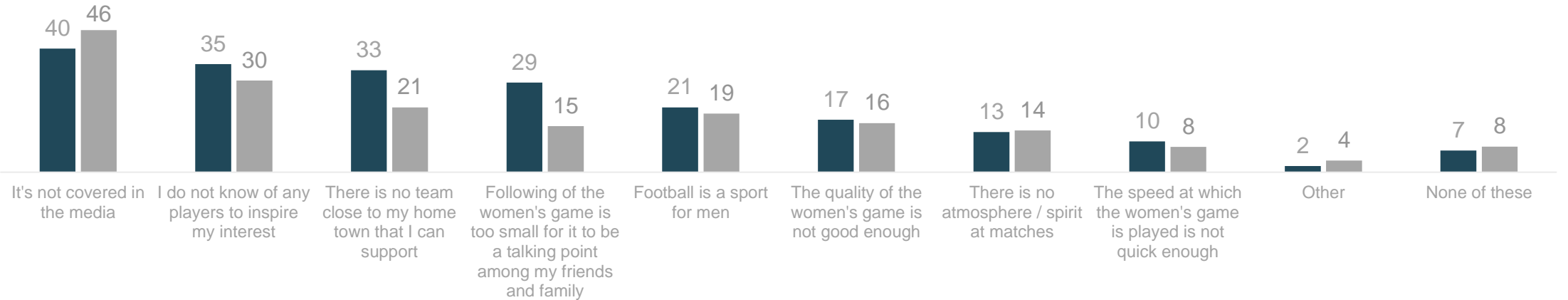
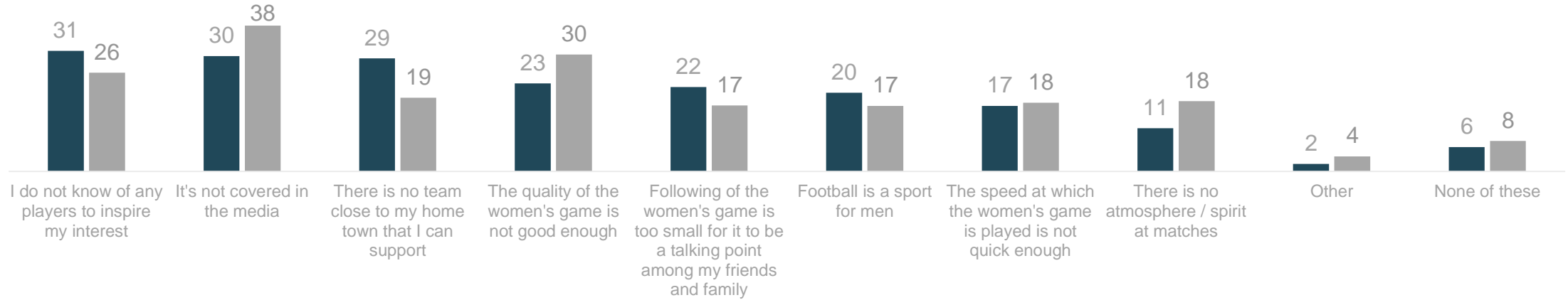
Attitudes to women's football (%)



*Interest is defined as “*interest in women’s competitions*” and “*interest in both men and women’s competitions*”

■ 2019 ■ Benchmark May-19

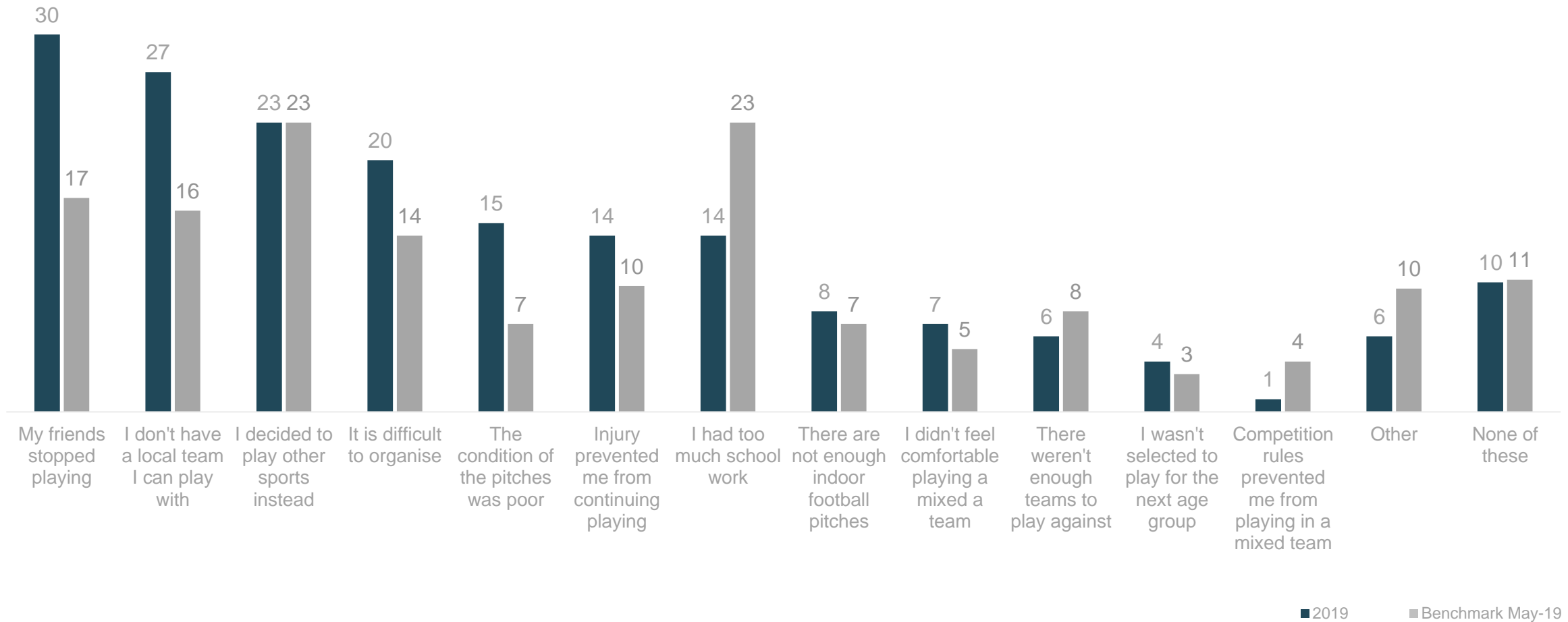
Barriers to women's football (%)



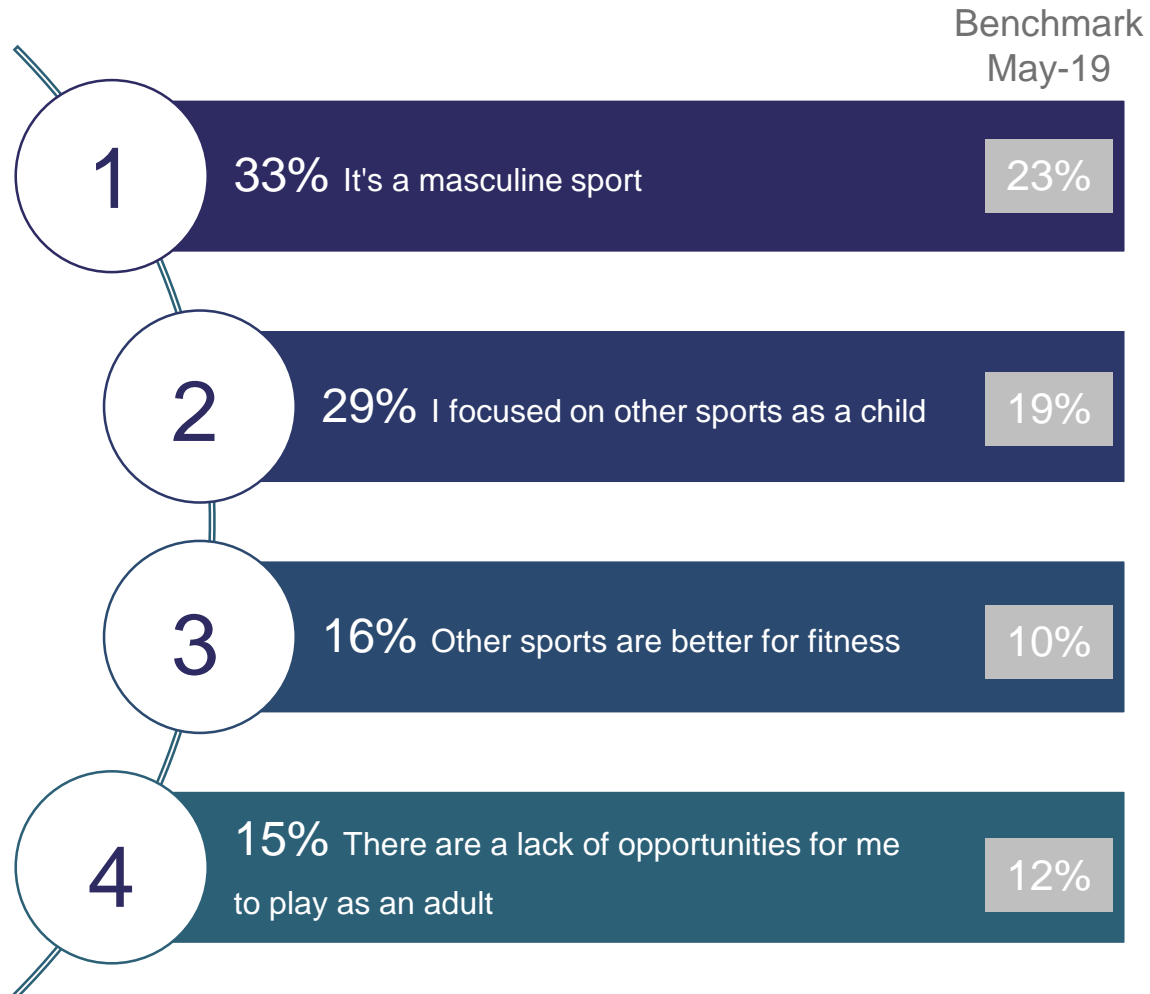
*Interest is defined as "interest in women's competitions" and "interest in both men and women's competitions"

■ 2019 ■ Benchmark May-19

Reasons women stopped playing football (%)



Barriers to football participation for women (%)



■ 2019

■ Benchmark May-19

Women's sport – Key takeouts and potential actions



Overall, interest in women's sports is well over the European benchmark. Football ranks 8th with 14%, but is a long way off volleyball (41%), athletics (36%) and tennis (27%). Amongst those who do follow women's football, most classify themselves as being more interested around major tournaments or being fans that don't attend matches.



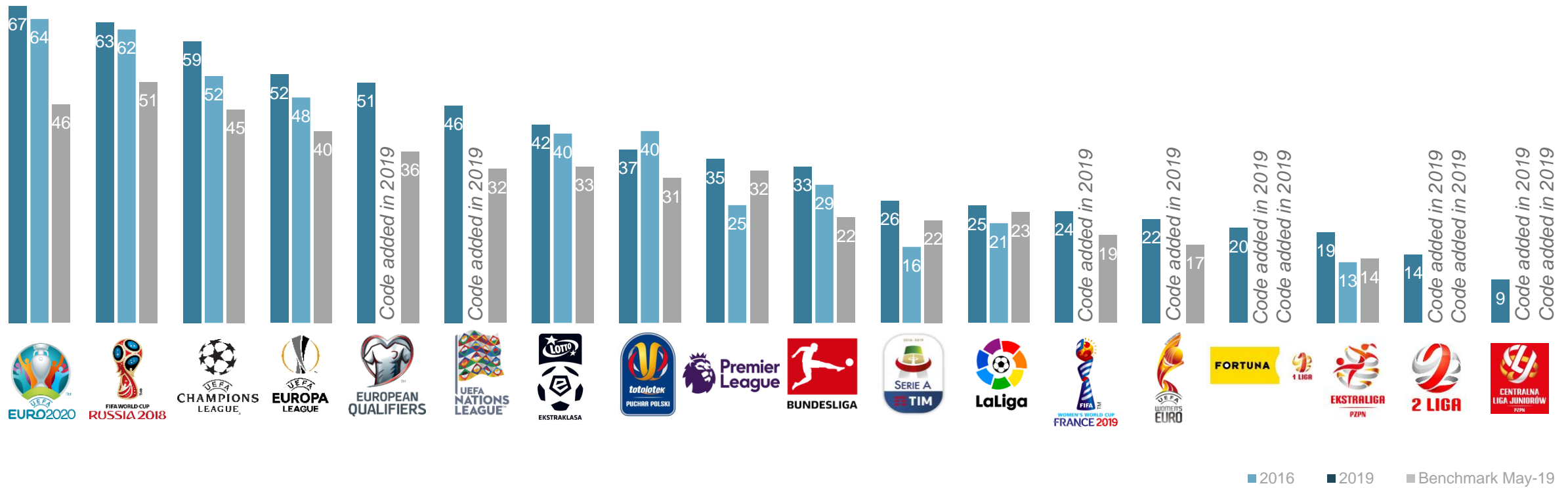
A third of women not playing football believe that women's football is masculine, which in turn restricts the interest. Lack of media coverage and players to look up to are the main barriers amongst both men and women. Furthermore, lack of opportunities (friends stopped and no local team) is the main reason amongst former female players for stopping playing.



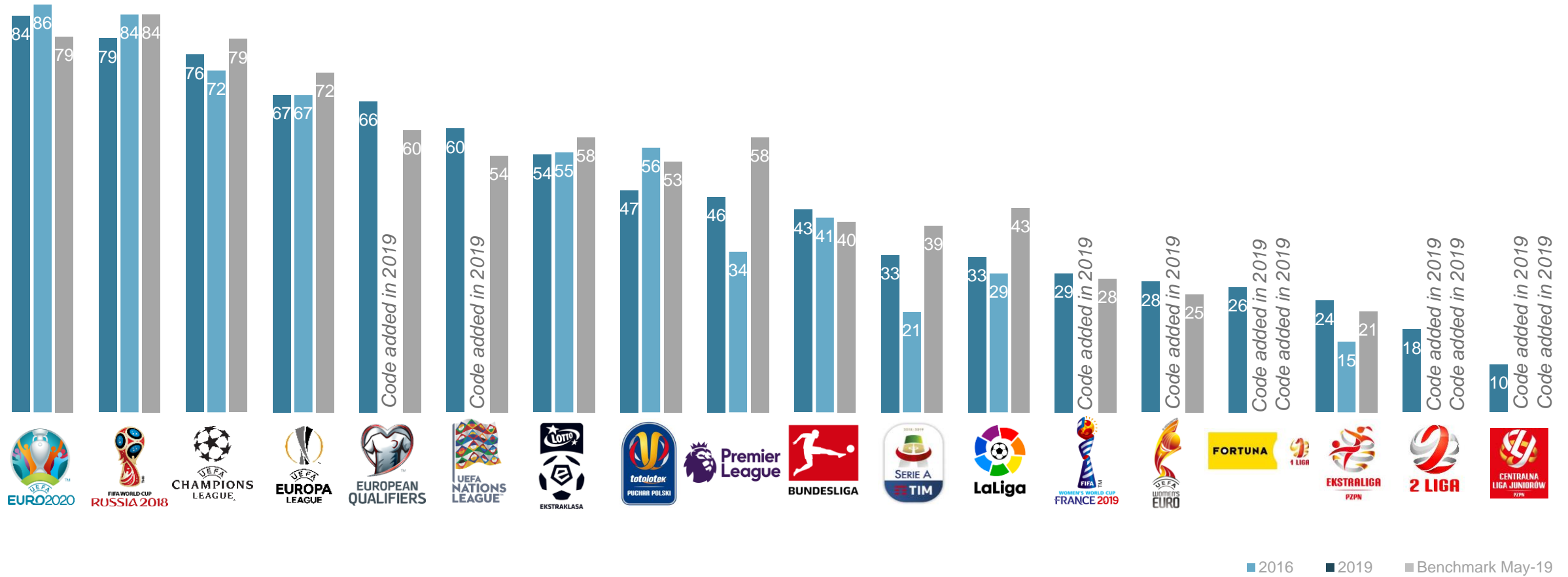
There's an opportunity to convert those interested in women's football into match-attending fans. The PZPN should raise awareness of local teams to make it easier, for those interested in playing, to find others to play with. There's also a need to increase media coverage and boost the women's game profile, which could be achieved by promoting best female players, such as Ewa Pajor who was a top goal-scorer in Frauen Bundesliga last season.

Competition Awareness, Interest and Imagery

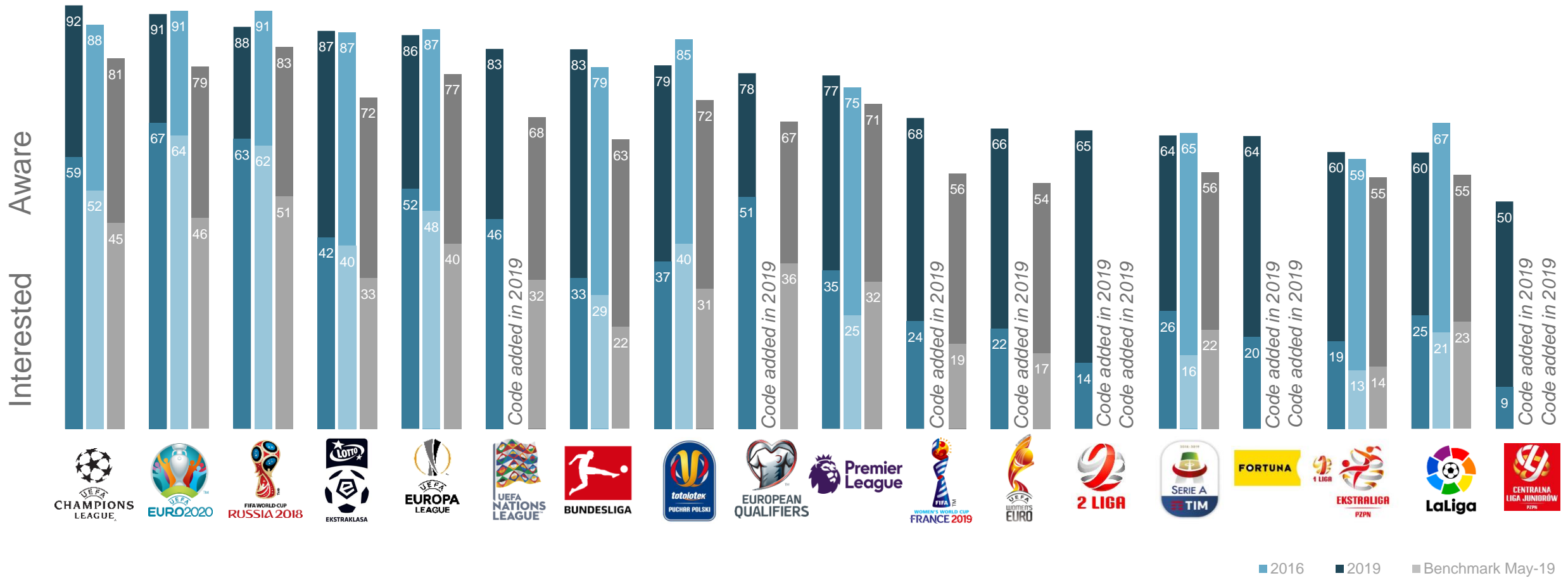
Competition interest – adult population (%)



Competition interest – football fans (%)

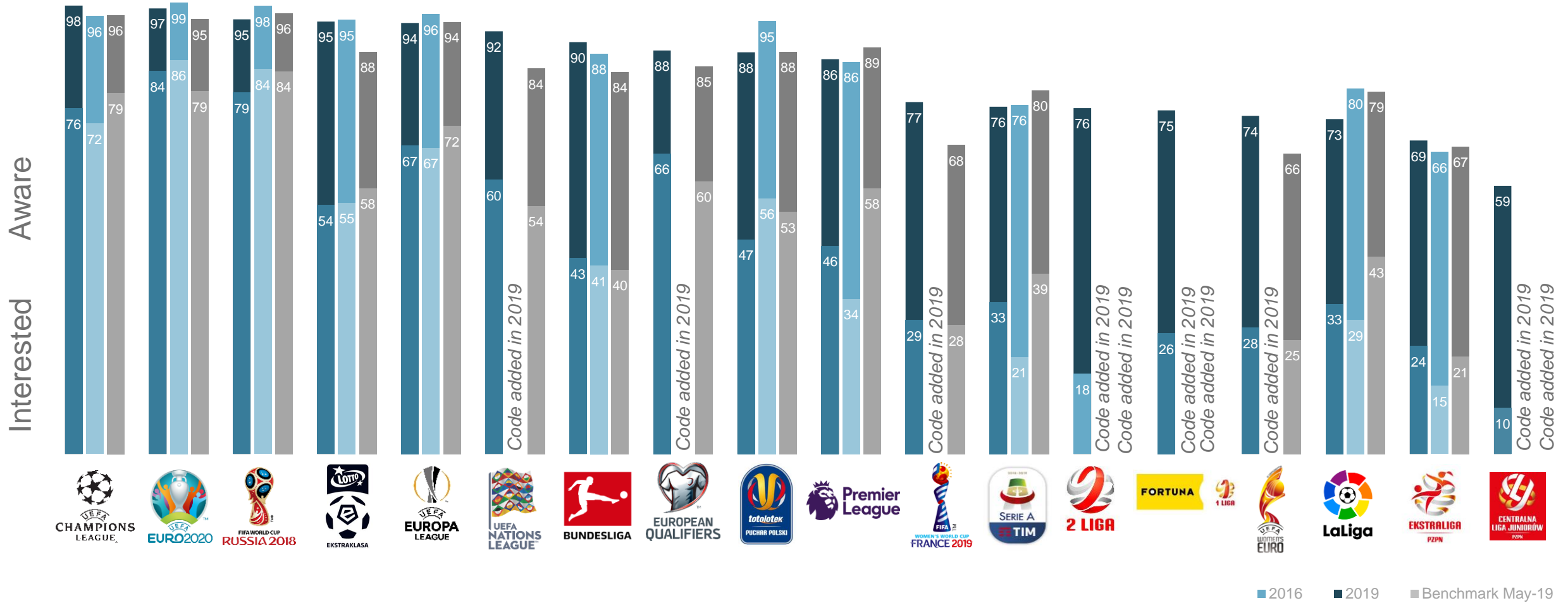


Competition awareness and interest – adult population (%)

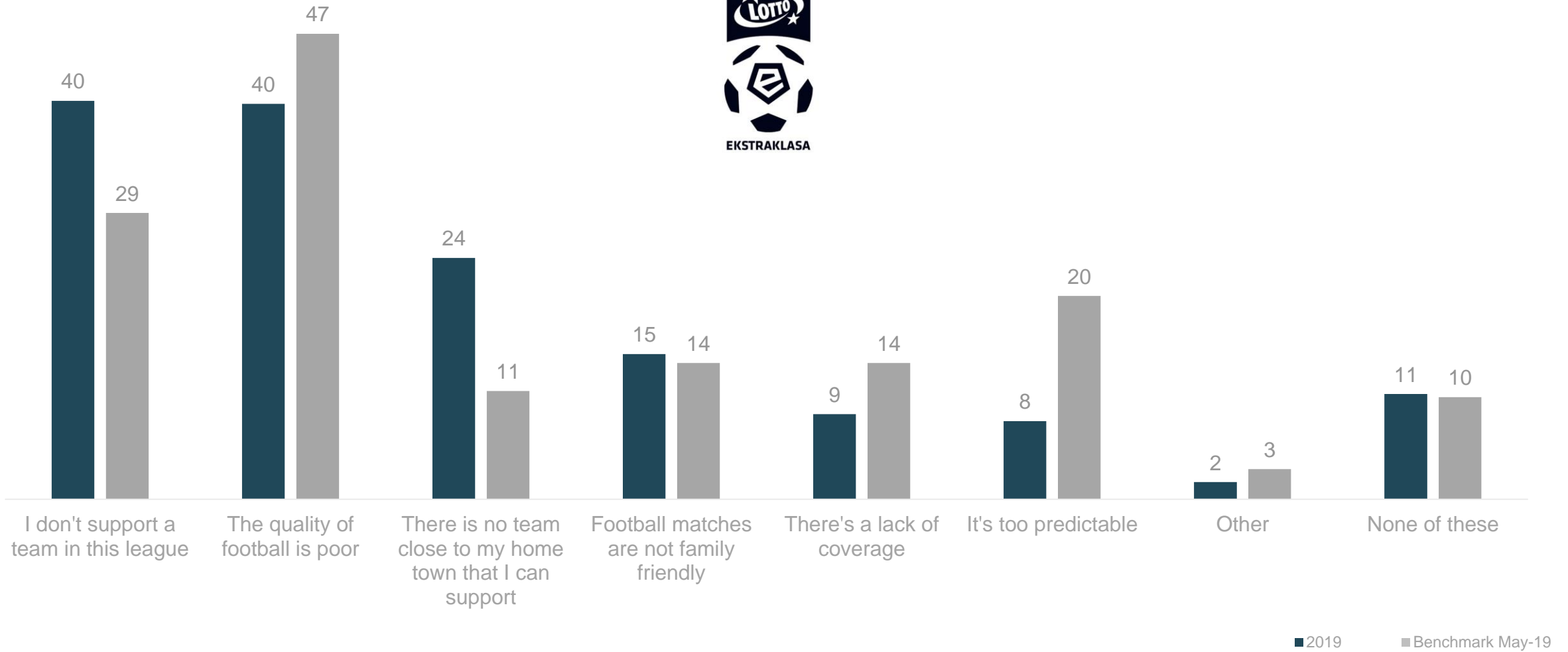


F2: Are you aware of or interested in this football competition?
 Base: All respondents: 2019 (1001), 2016 (1000) , Benchmark May-19 (54349)

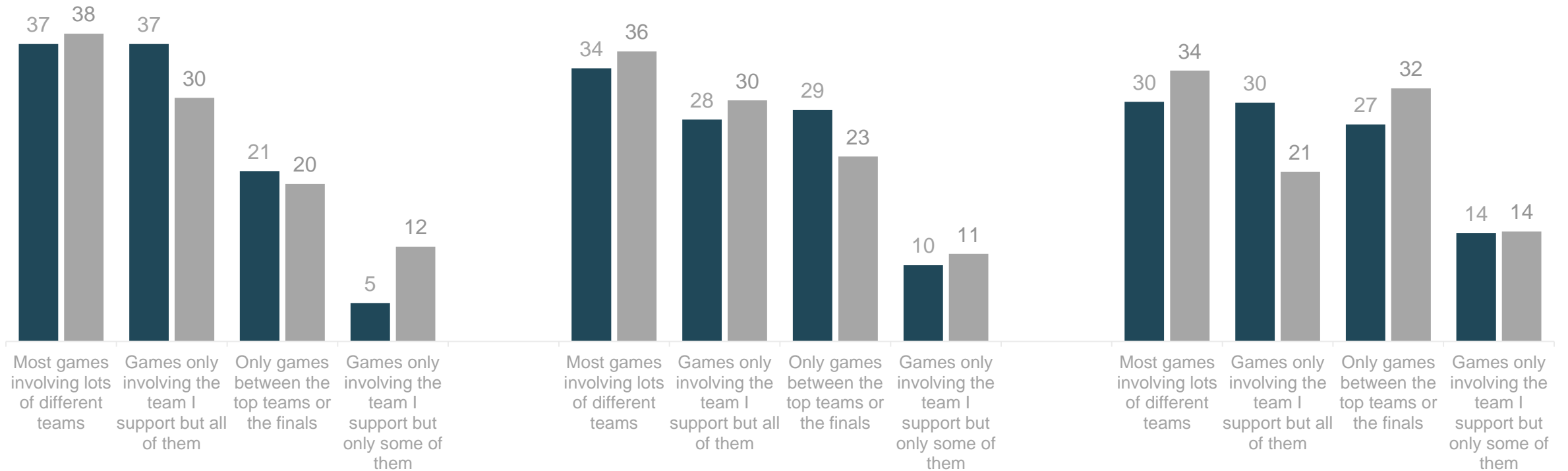
Competition awareness and interest – football fans (%)



Reasons for lack of interest in the Ekstraklasa – football fans (%)



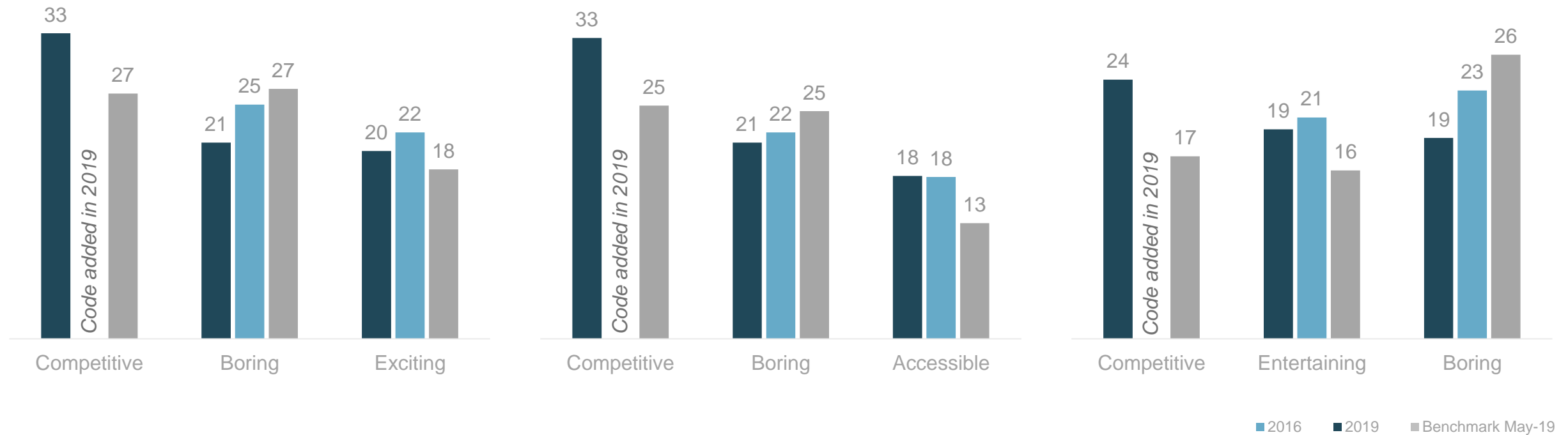
Types of domestic club matches following (%)



F13A: Which types of games do you follow?

Base: Football fans interested in the competition: Domestic League (379), Domestic Cup (327), Domestic Women's League (165); Benchmark May-19 Domestic League (3840), Domestic Cup (3477), Domestic Women's League (1225)

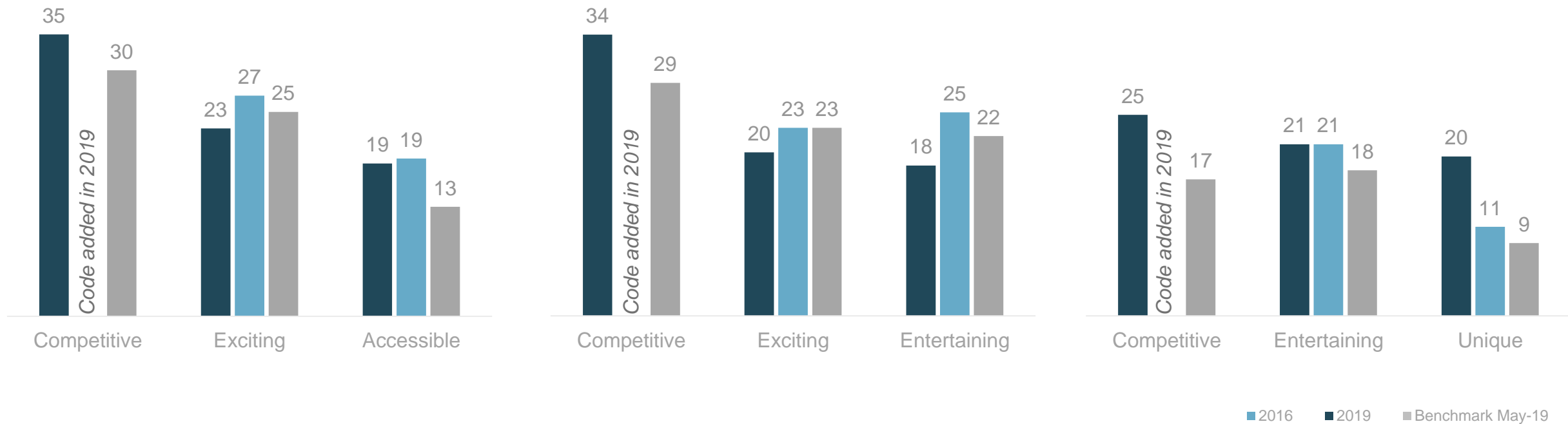
Imagery of domestic competitions – adult population (%)



F4: Which of these words or phrases describe the following competitions?

Base: Adults aware of competition: 2019: Domestic League (868), Domestic Cup (792), Domestic Women's League (603); 2016: Domestic League (866), Domestic Cup (851), Domestic Women's League (588); Benchmark May-19 : Domestic League (39969), Domestic Cup (40007), Domestic Women's League (24963)

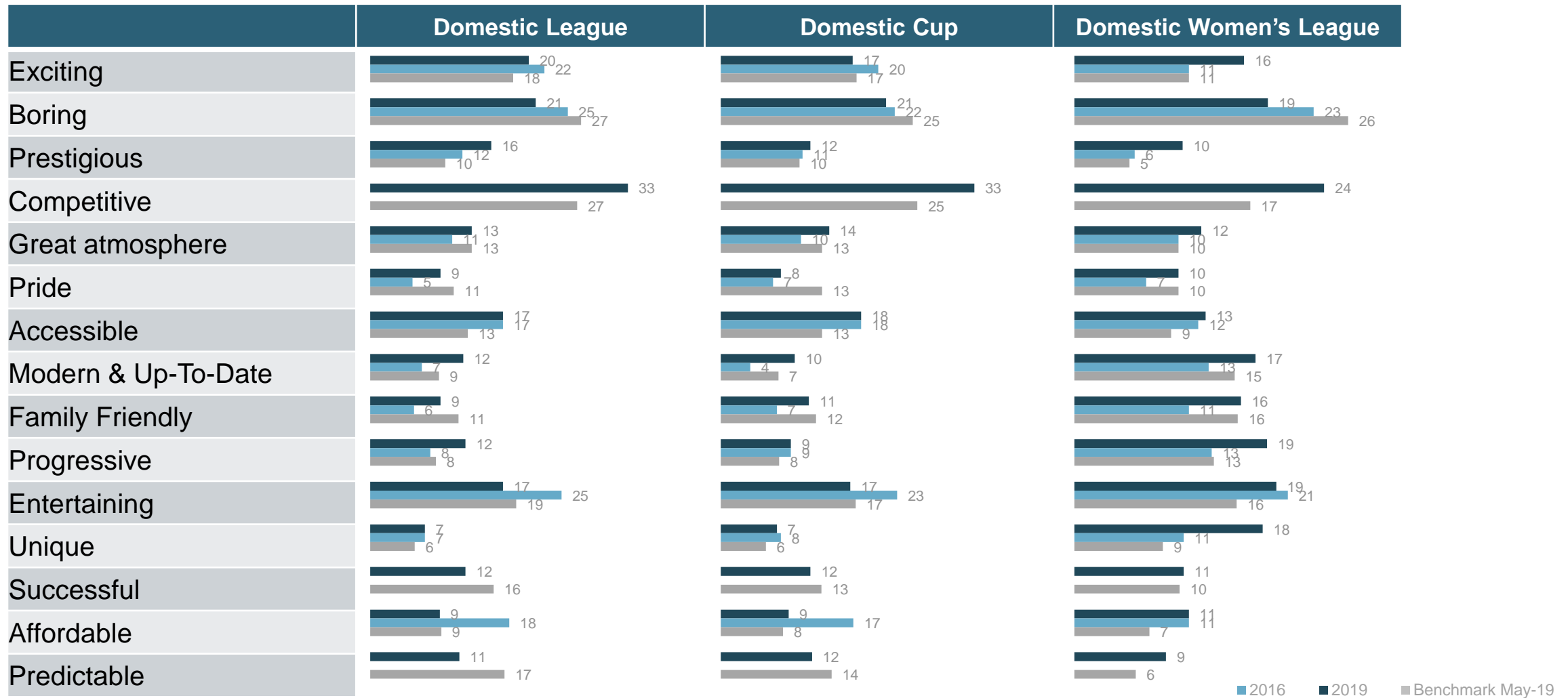
Imagery of domestic competitions – football fans (%)



F4: Which of these words or phrases describe the following competitions?

Base: Football fans aware of competition: 2019: Domestic League (662), Domestic Cup (615), Domestic Women's League (479); 2016: Domestic League (602), Domestic Cup (600), Domestic Women's League (419); Benchmark May-19: Domestic League (23692), Domestic Cup (24097), Domestic Women's League (15741)

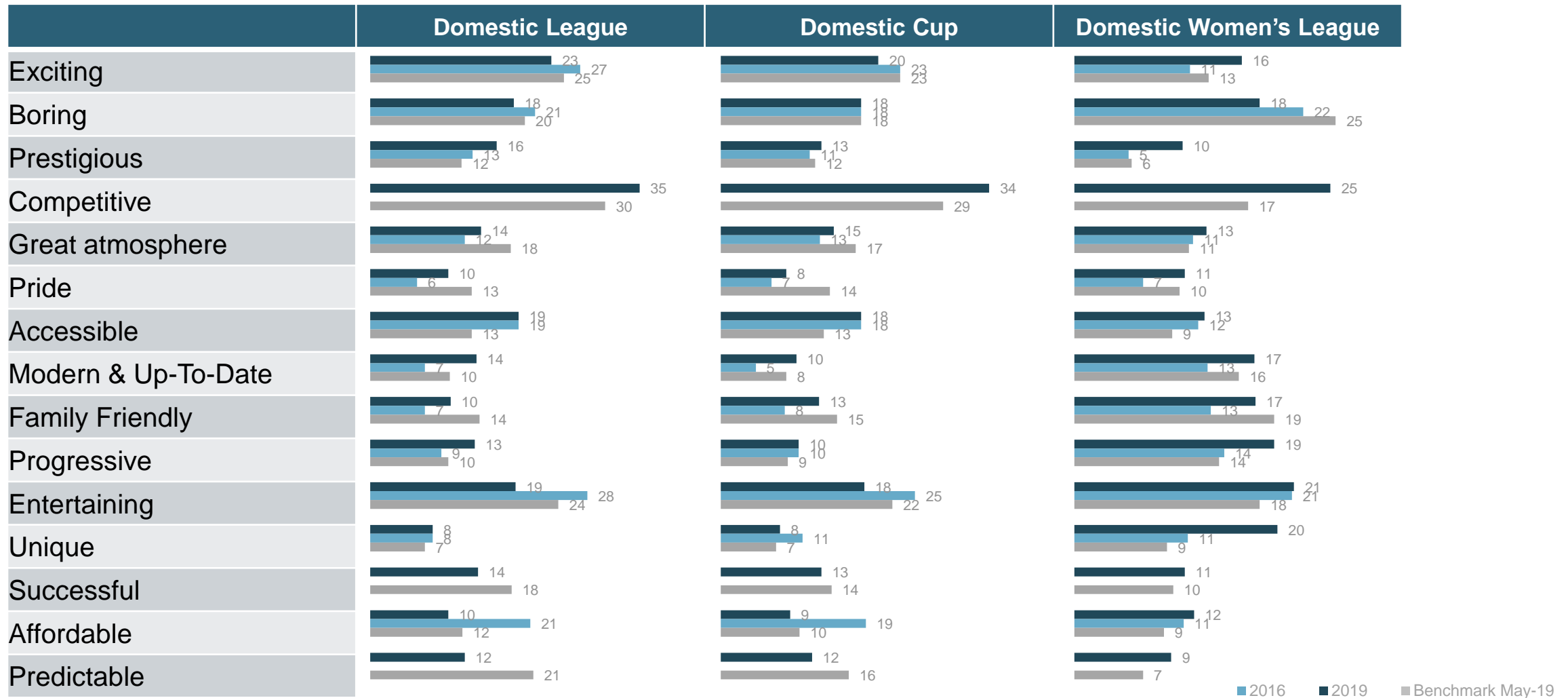
Imagery of domestic competitions – adult population (%)



F4: Which of these words or phrases describe the following competitions?

Base: Aware of: 2019: Domestic League (868), Domestic Cup (792), Domestic Women's League (603); 2016: Domestic League (866), Domestic Cup (851), Domestic Women's League (588); Benchmark May-19 : Domestic League (39969), Domestic Cup (40007), Domestic Women's League (24963)

Imagery of domestic competitions – football fans (%)



F4: Which of these words or phrases describe the following competitions?

Base: Football Fans aware of: 2019: Domestic League (662), Domestic Cup (615), Domestic Women's League (479); 2016: Domestic League (602), Domestic Cup (600), Domestic Women's League (419); Benchmark May-19: Domestic League (23692), Domestic Cup (24097), Domestic Women's League (15741)

Competition Awareness, Interest and Imagery – Key takeouts and potential actions



The interest in the Ekstraklasa remains fairly stable compared with 2016 amongst all adults (42%) as well as football fans (54%). Overall awareness levels of this domestic league are high and on par with the FIFA World Cup and UEFA Europa League, emphasizing a large group of people who are aware but not interested. Interestingly enough, more football fans are aware of the 1 Liga and the 2 Liga than the Spanish LaLiga.



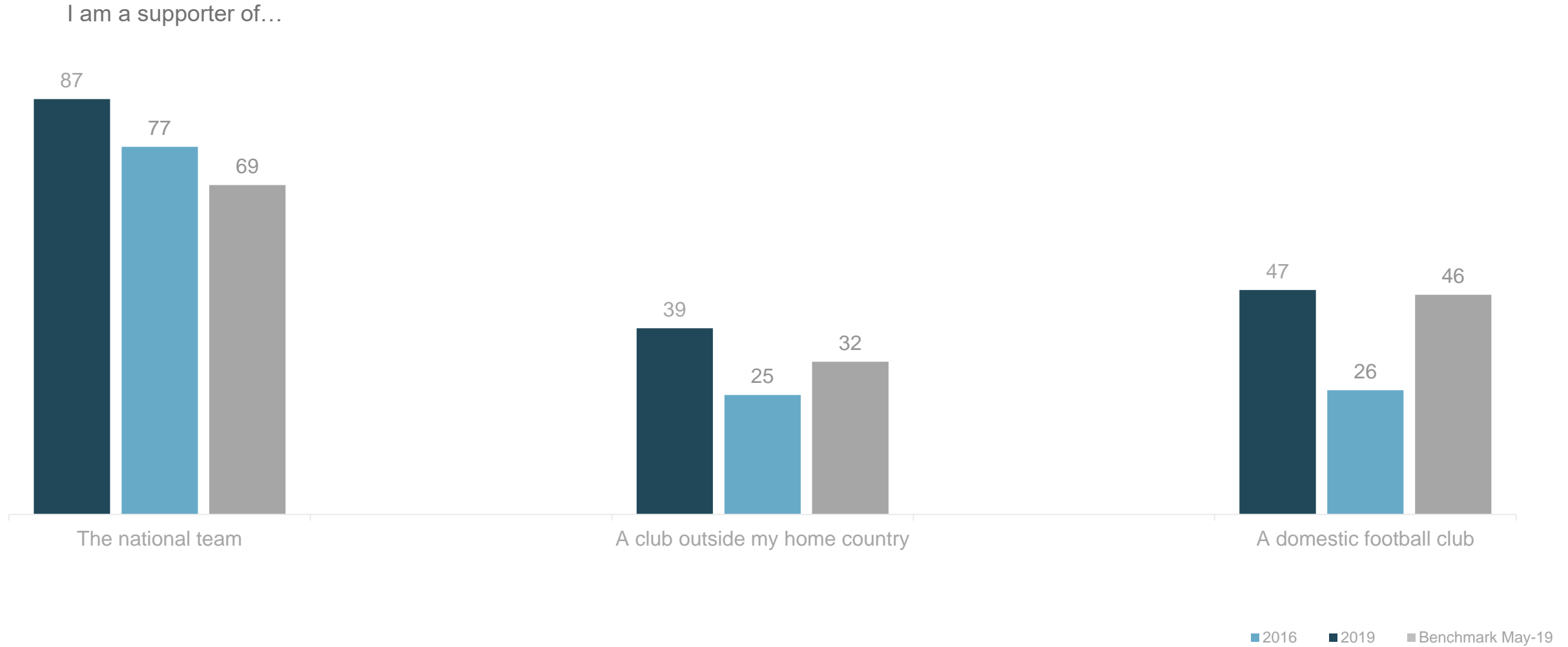
There's an equal split of football fans watching games involving various teams as well as just their favourite team. The league is seen, by football fans, as more competitive (35%) than the European benchmark (30%). This could be the result of Piast Gliwice winning its first title ever, stopping Legia's 3 years reign atop. However, the league is seen as less exciting (23%) as it used to in 2016 (27%). The PZPN's good job is seen in the women's Ekstraliga, which is perceived a lot more positive than the European benchmark.



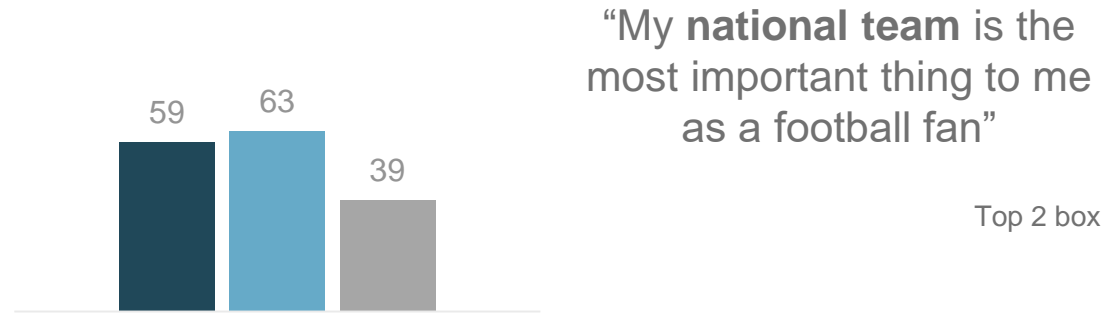
The key is to keep the Ekstraklasa competitive, which in turn would attract those who think the league is of poor quality. There's a large proportion of people who are aware but not interested, which indicates that there's an opportunity to better promote the positive elements of the league and its competitive nature.

Football Following

Club and national team following (%)



Club vs. country (%)

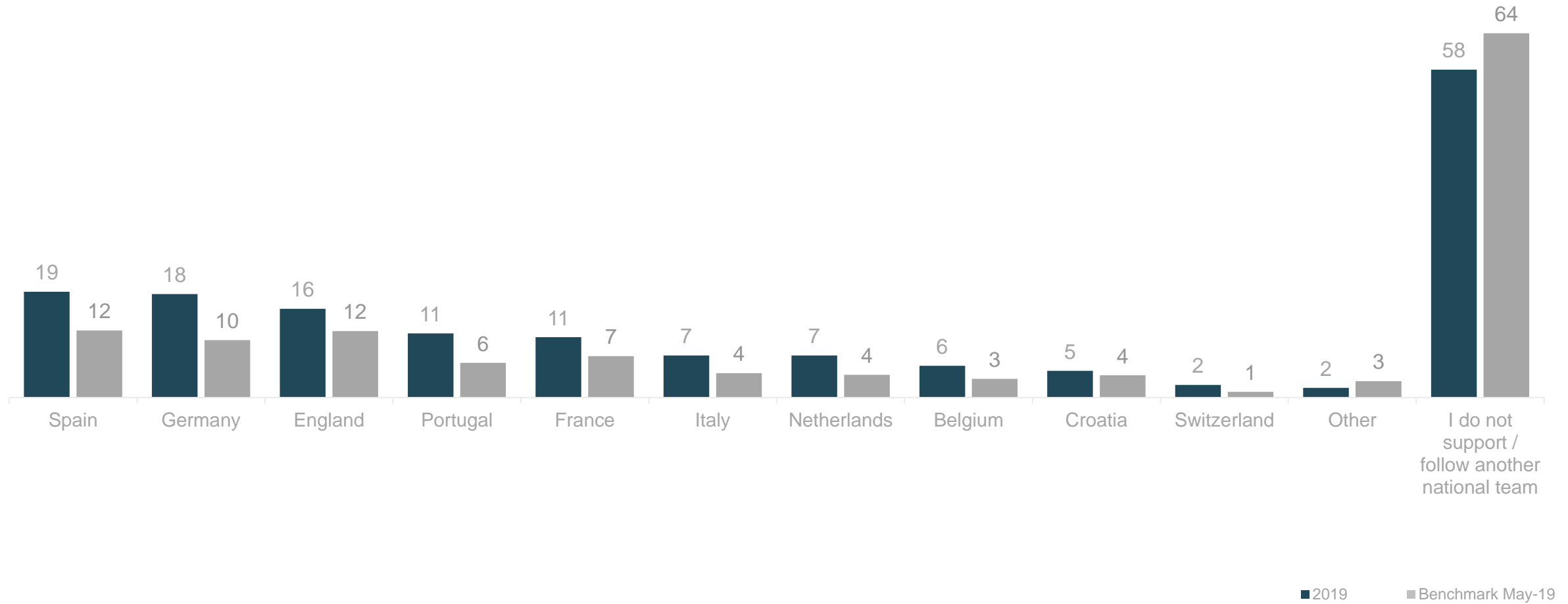


“My club team is the most important thing to me as a football fan”



Other national team following (%)

I am a supporter of...



Football Following – Key Points



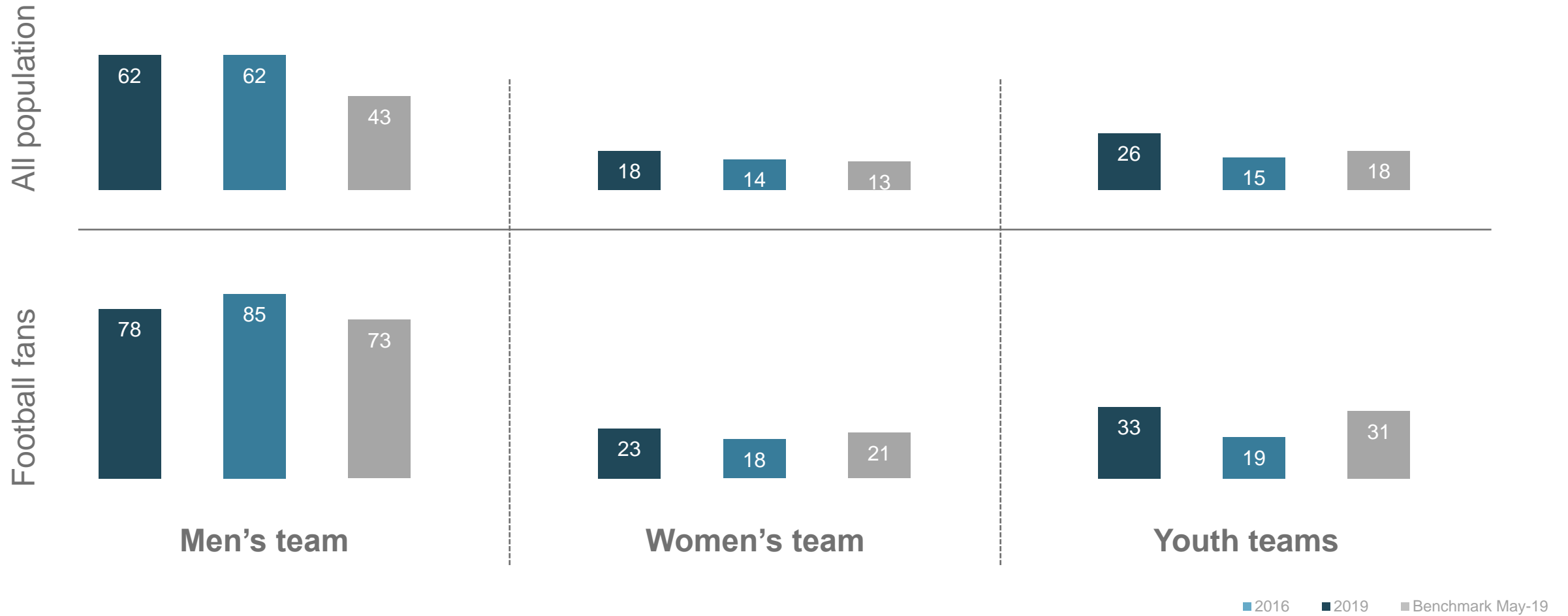
Support for the national team (87%) is well above the European benchmark (69%) and has increased by 10% since 2016. Those supporters feel they get more emotionally involved when watching. Support for a domestic club (47%) hovers around the European benchmark level, having improved by 21% since 2016.



Those who perceive the national team as the most important thing has decreased since 2016, which would indicate there's a less enthusiastic support for the team.

National Team Awareness, Interest and Imagery

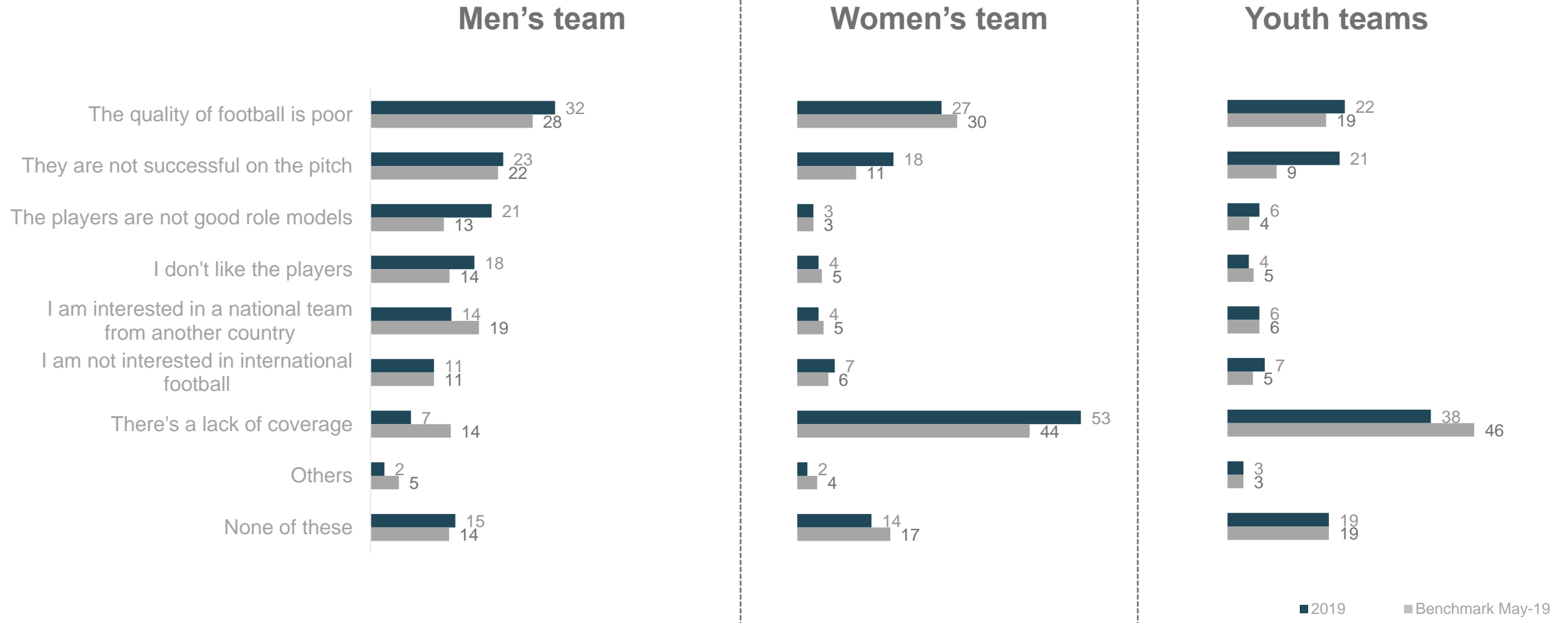
National team interest (%)



F6: Are you aware of or interested in this football team?

Base: All respondents: 2019 (1001), 2016 (1000), Benchmark May-19 (55350); Football fans: 2019 (701), 2016 (634), Benchmark May-19 (26949)

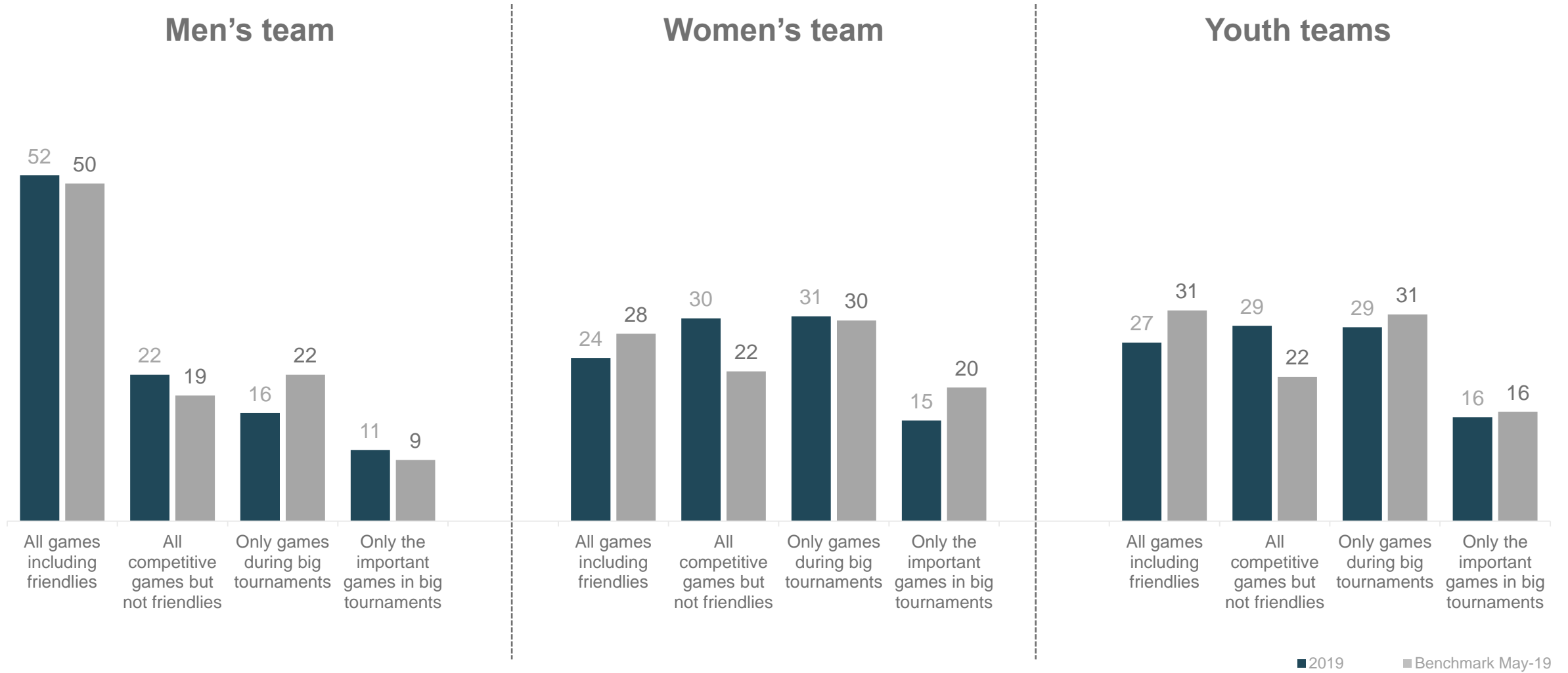
Reasons for lack of interest in national teams – football fans (%)



F7: Why are you not interested in the Men's national team?; F8: Why are you not interested in the Women's national team?; F8A: Why are you not interested in the Youth national teams?

Base: 2019 Football fans not interested in: Men's national team (122), Women's national team (261), Youth national teams (287); Benchmark Football fans not interested in: Men's national team (1128), Women's national team (2458), Youth national teams (2717)

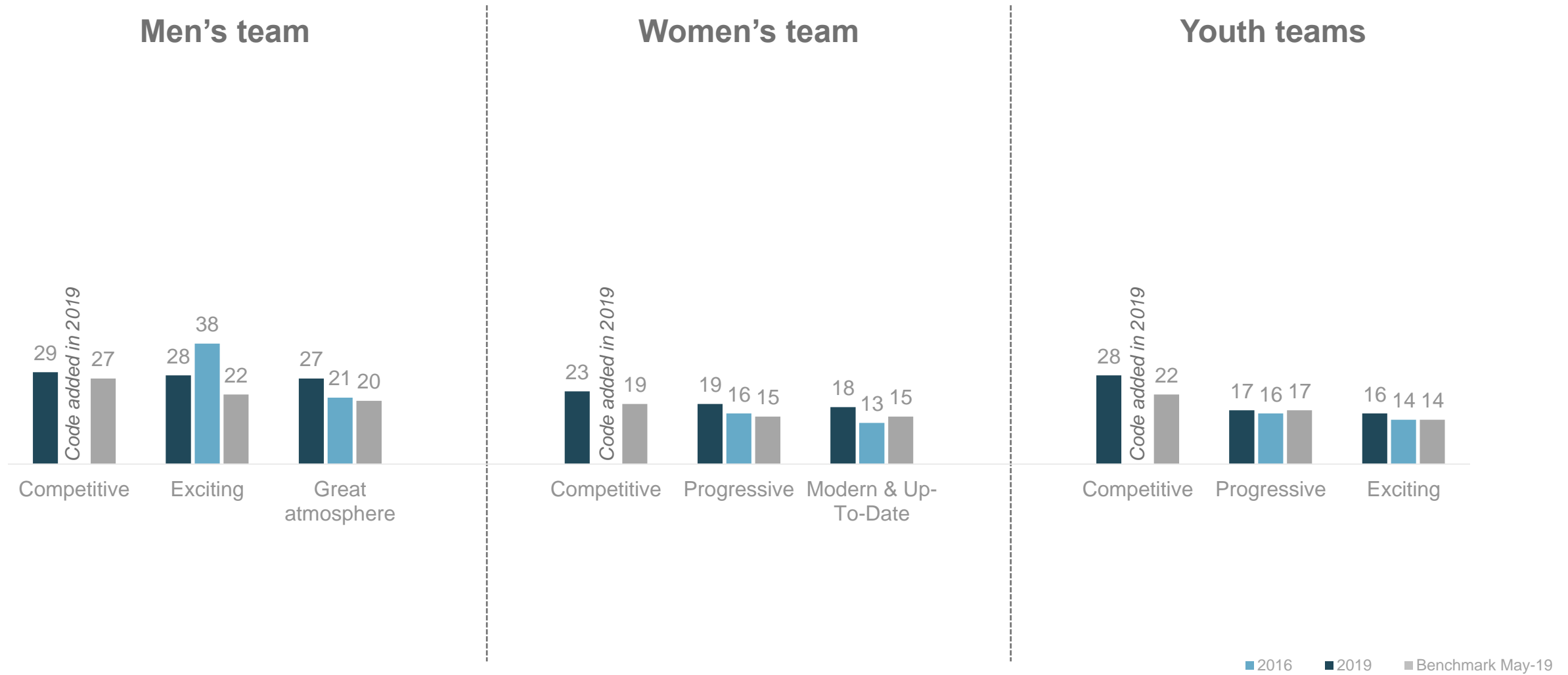
Types of national team matches following (%)



F13: Which types of games do you follow?

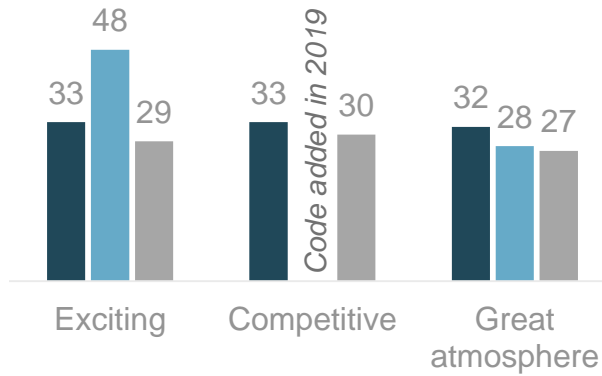
Base: Football fans interested in: 2019 Men's national team (549), Women's national team (160), Youth national teams (232); Benchmark May-19 Men's national team (4414), Women's national team (1408), Youth national teams (1501)

Imagery of national teams – adult population (%)

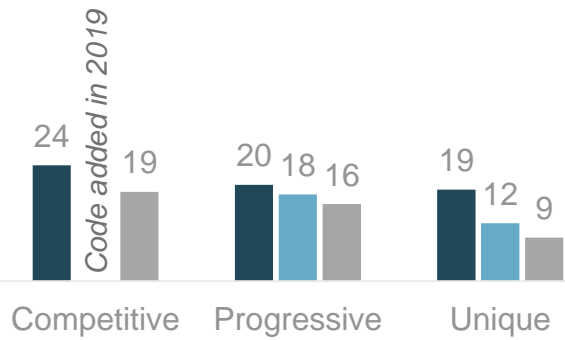


Imagery of national teams – football fans (%)

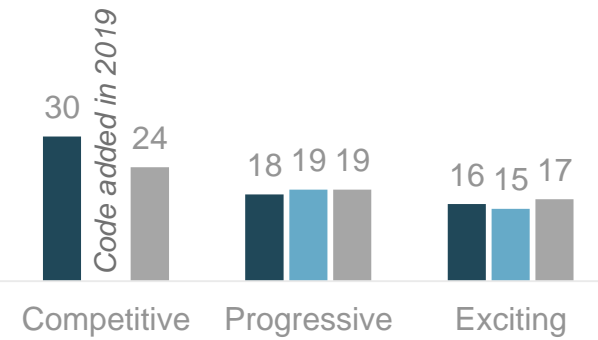
Men's team



Women's team

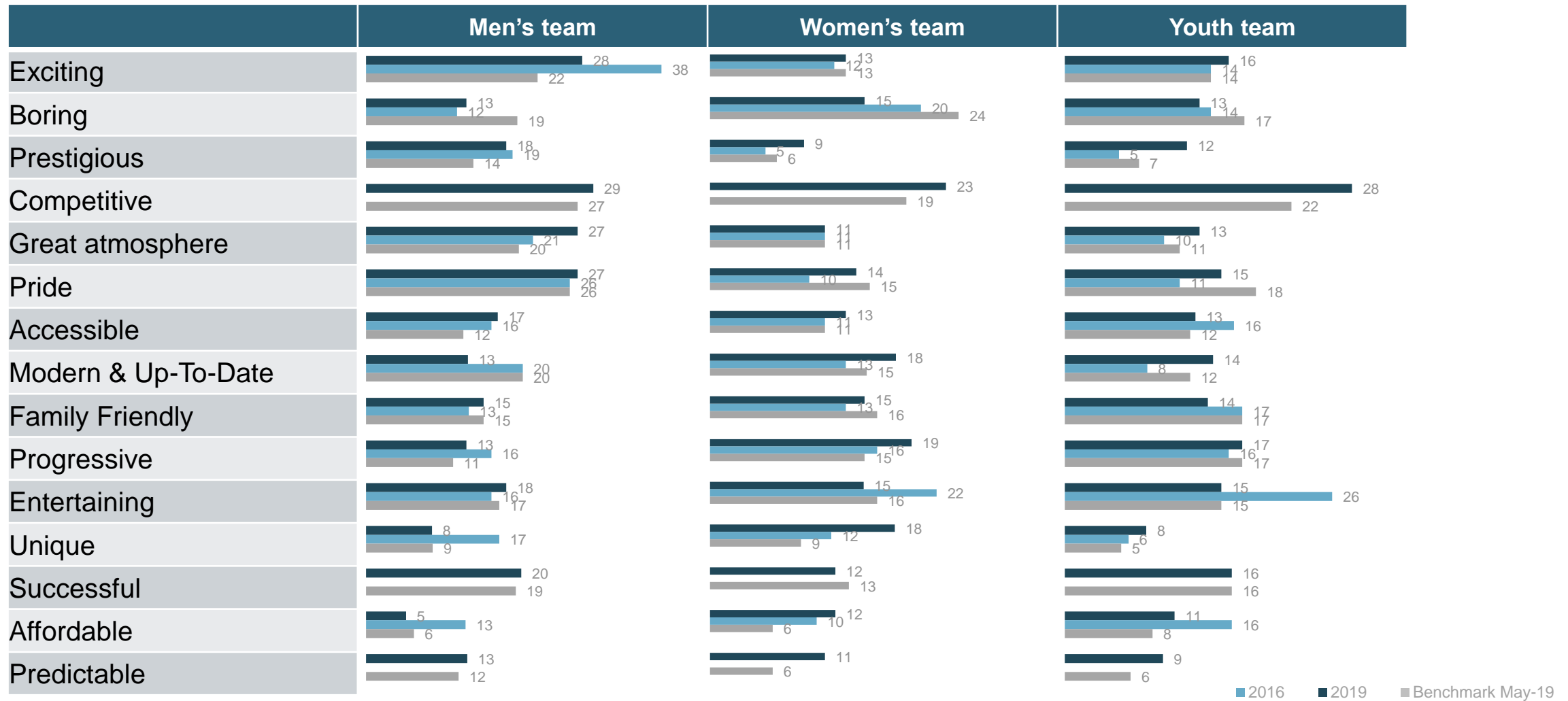


Youth teams



■ 2016 ■ 2019 ■ Benchmark May-19

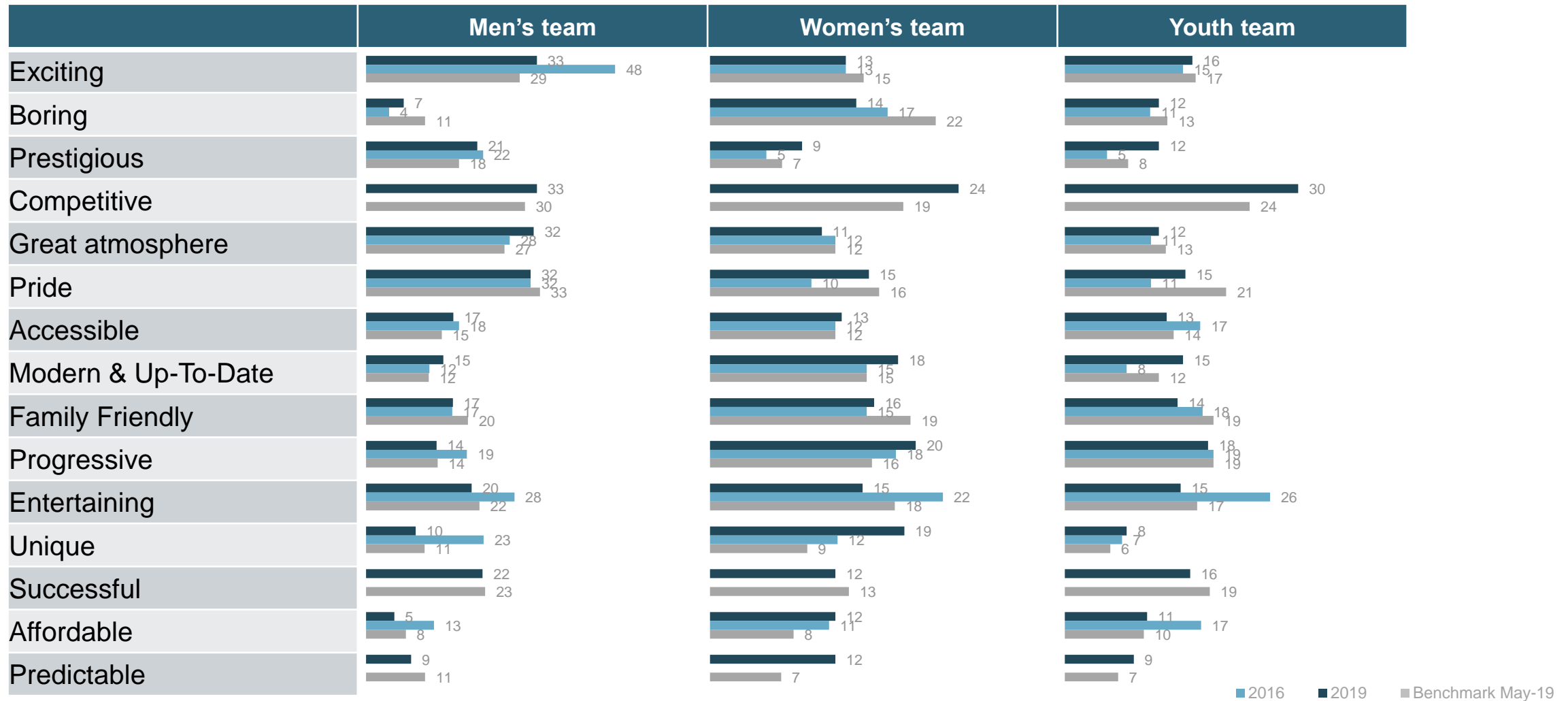
Imagery of national teams– adult population (%)



F9: Which of these words or phrases describe the following teams?

Base: Respondents aware of: 2019 Men's national team (887), Women's national team (513), Youth national teams (628); 2016 Men's national team (910), Women's national team (615), Youth national teams (689); Benchmark Men's national team (43065), Women's national team (28327), Youth national teams (31194)

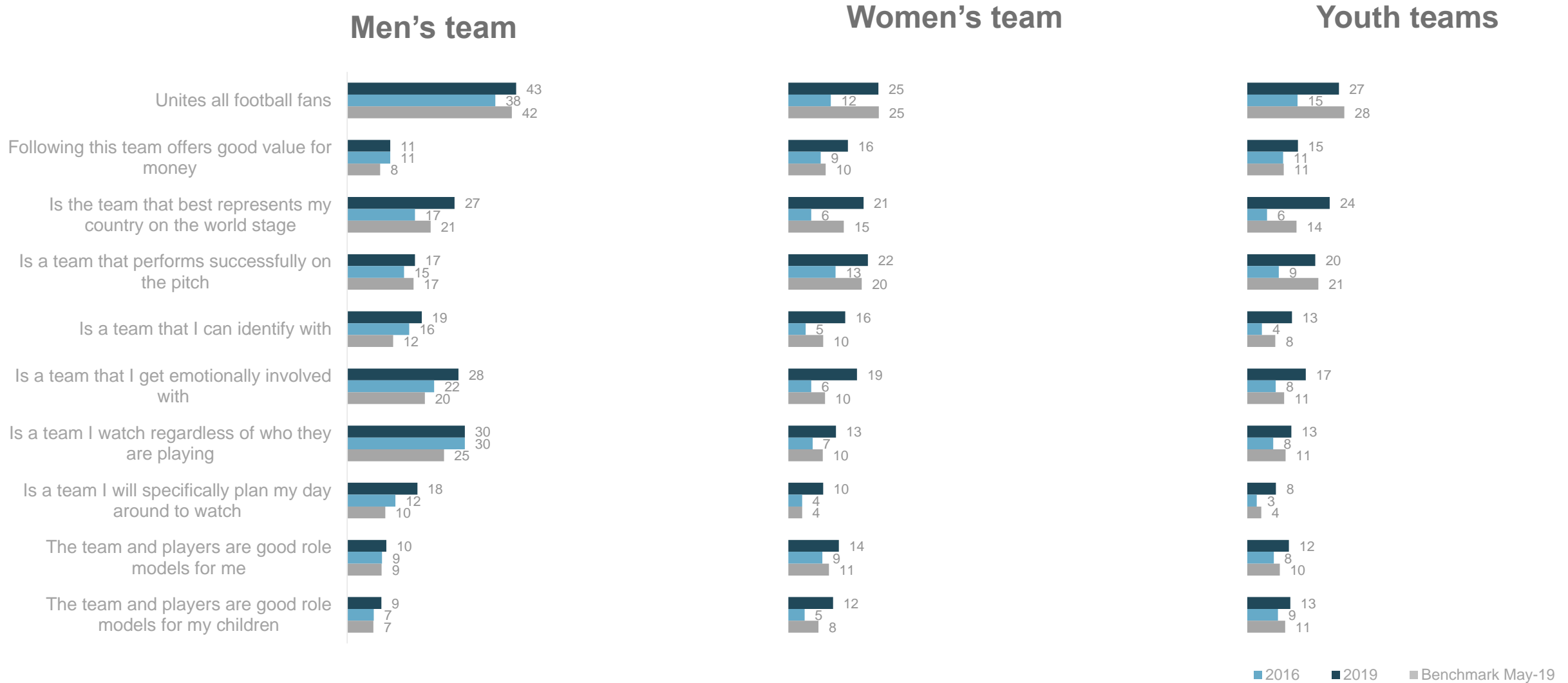
Imagery of national teams– football fans (%)



F9: Which of these words or phrases describe the following teams?

Base: 2019 Football Fans aware of: Men's national team (671), Women's national team (421), Youth national teams (519); 2016 Football Fans aware of: Men's national team (629), Women's national team (446), Youth national teams (507); Benchmark May-19 Football Fans aware of: Men's national team (25131), Women's national team (17205), Youth national teams (19683)

National teams' brand image (%)



F10: Which of these words or phrases describe the following teams?

Base: Aware: 2019 Men's team (887), Women's team (513), Youth teams (628); 2016 Men's team (910), Women's team (615), Youth teams (689); Benchmark May-19 Men's team (43063), Women's team (28673), Youth teams (31156)

National Team Awareness, Interest and Imagery – Key takeouts and potential actions



Although the interest in the men's national team remains on par amongst adults and has slightly decreased amongst fans since 2016, the interest in the national women's and youth teams has increased since 2016. Interest in all the teams is above the European benchmark.



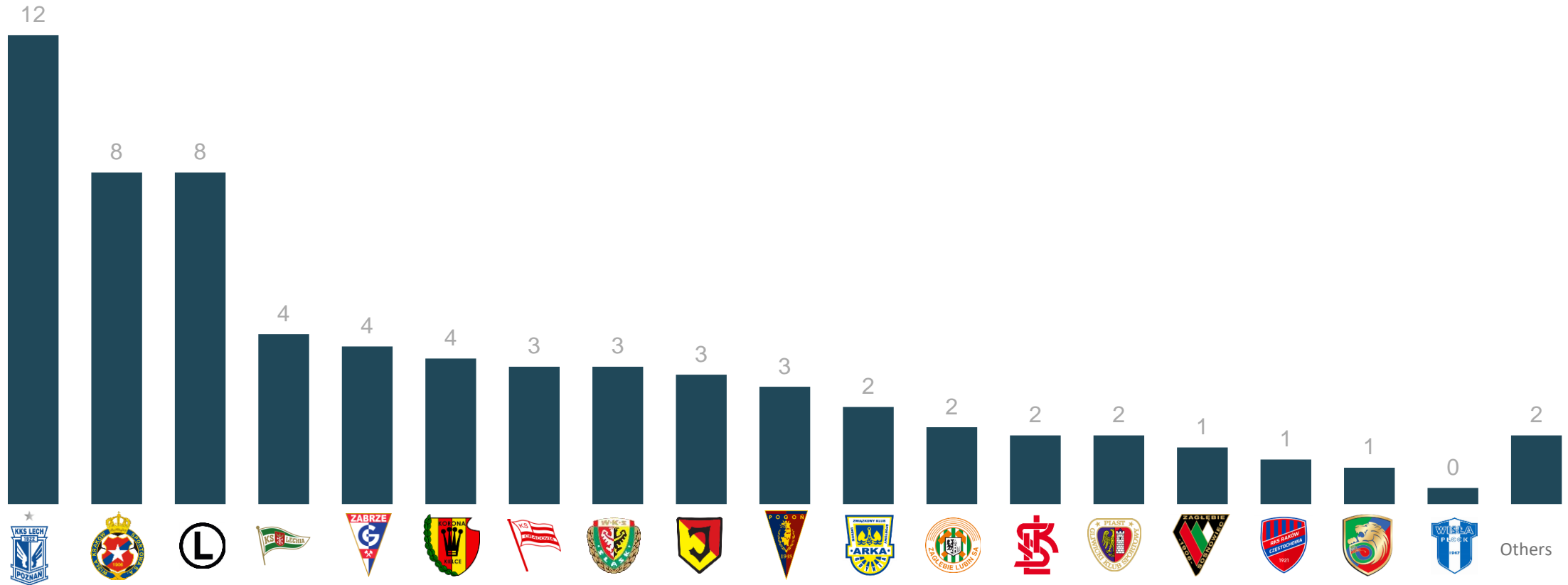
The positive results are also seen when looking at the imagery of the national teams whereby all statements have seen encouraging growth for the women's and youth teams. Men's team has seen a more stable increase since 2016 but the team is seen as less exciting than previously.



The rise in the interest in the youth teams could be down to Poland hosting the U20 Football World Cup – the first-ever FIFA tournament organised in the country, and thus attracted a lot of attention to youth football in the country. Women's team could also benefit from an increased media attention, as the interest in the team is on the rise but the main barrier cited is the lack of media coverage.

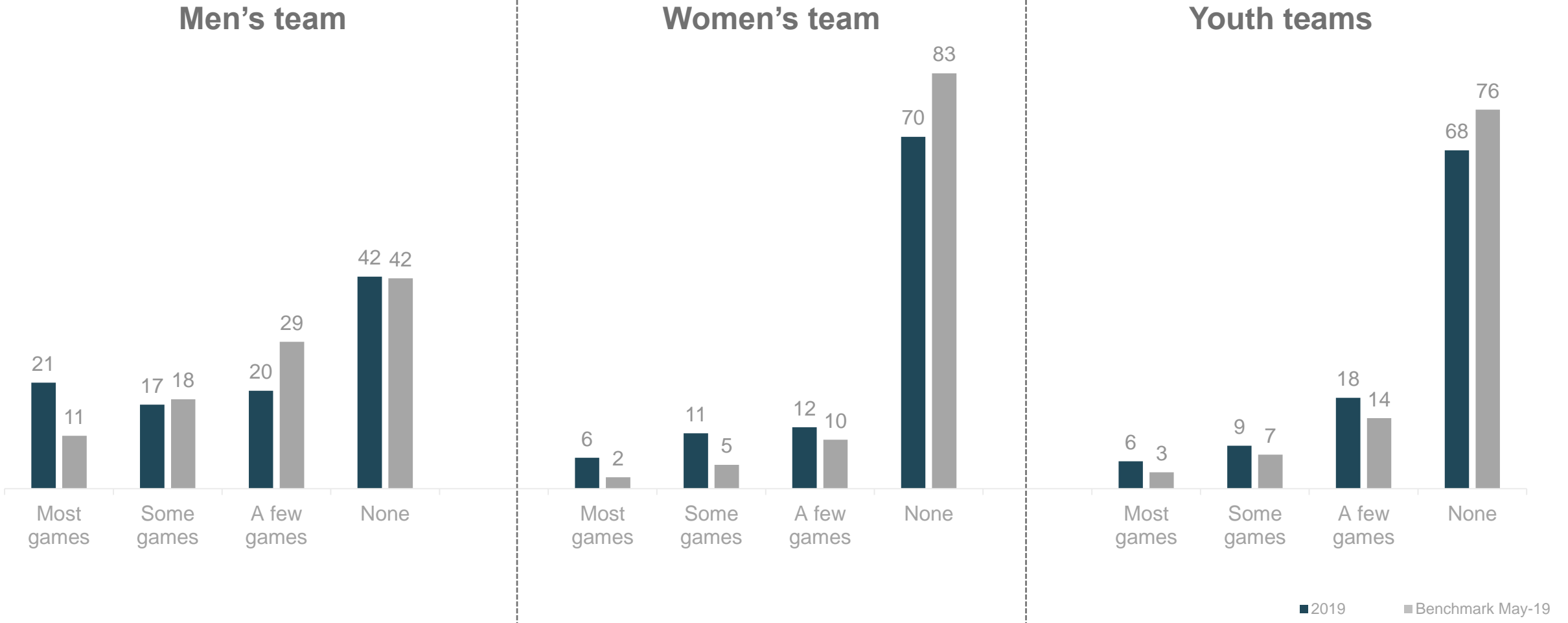
Club Following

Favourite domestic club (%)

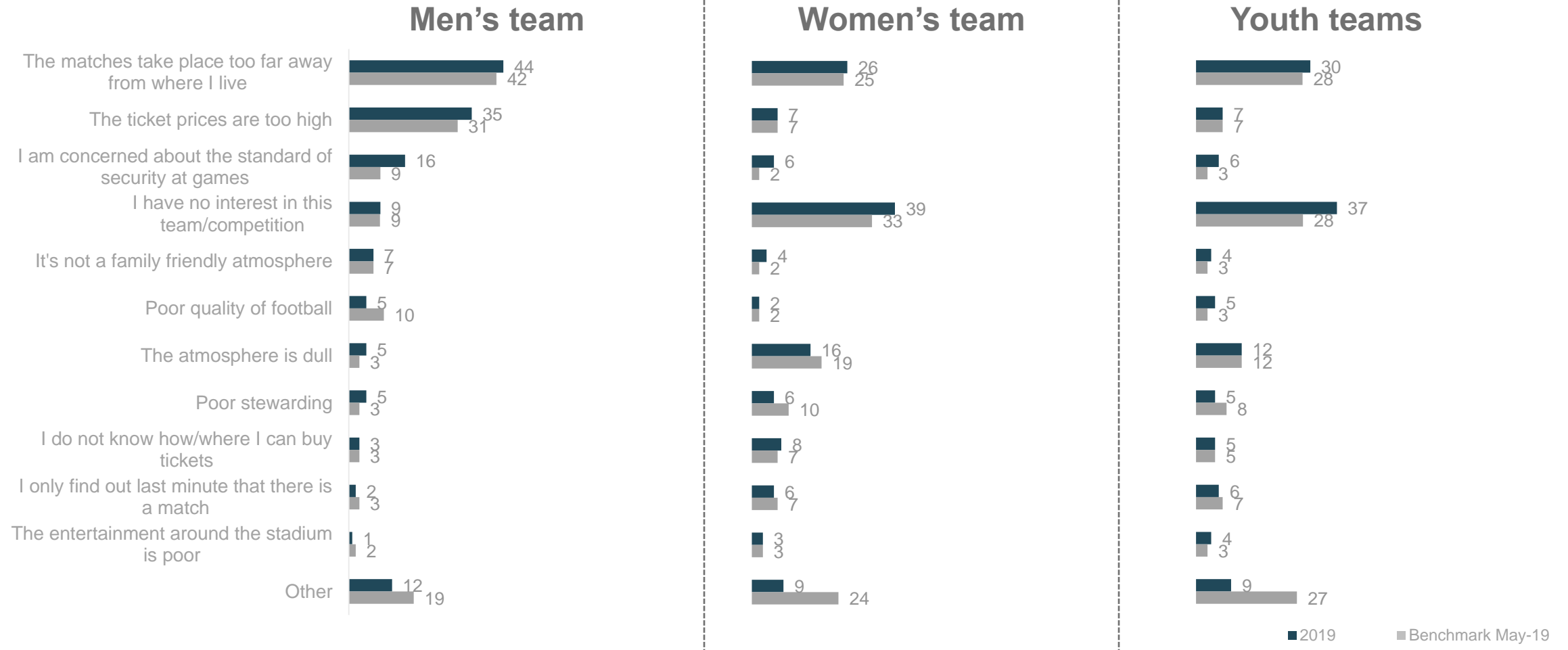


Attendance

National Football Attendance (%)



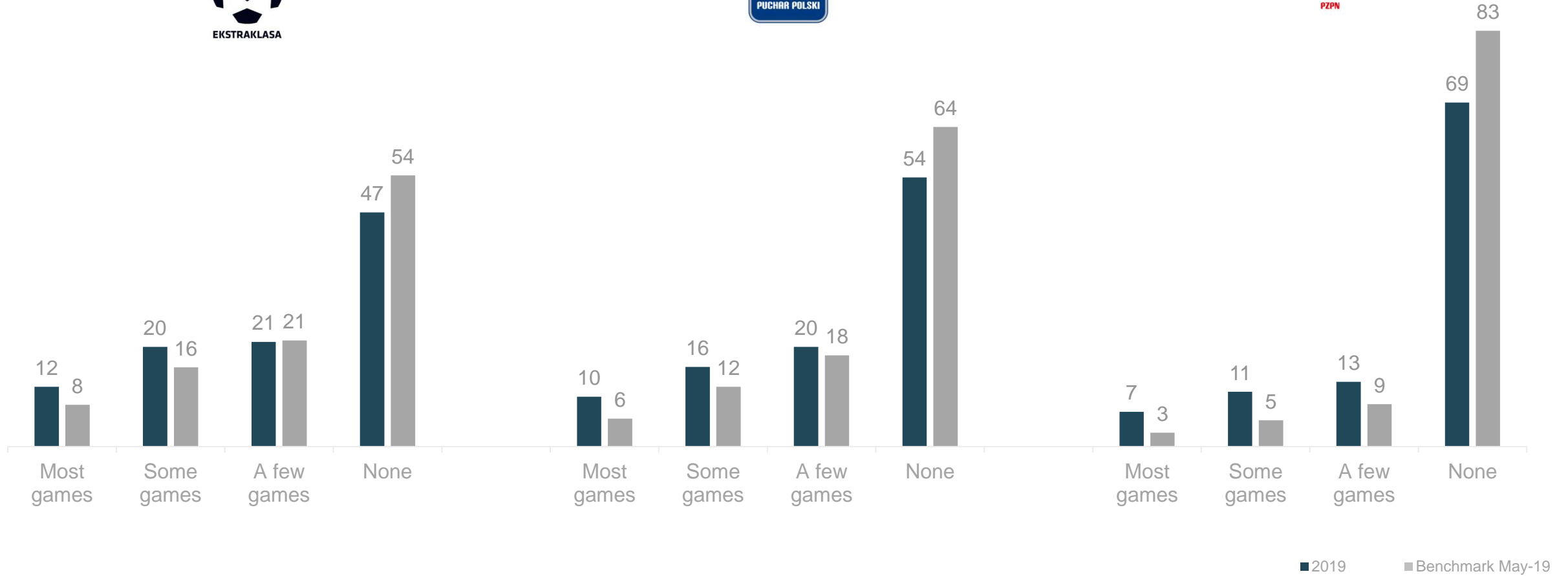
Reasons for not attending national team matches (%)



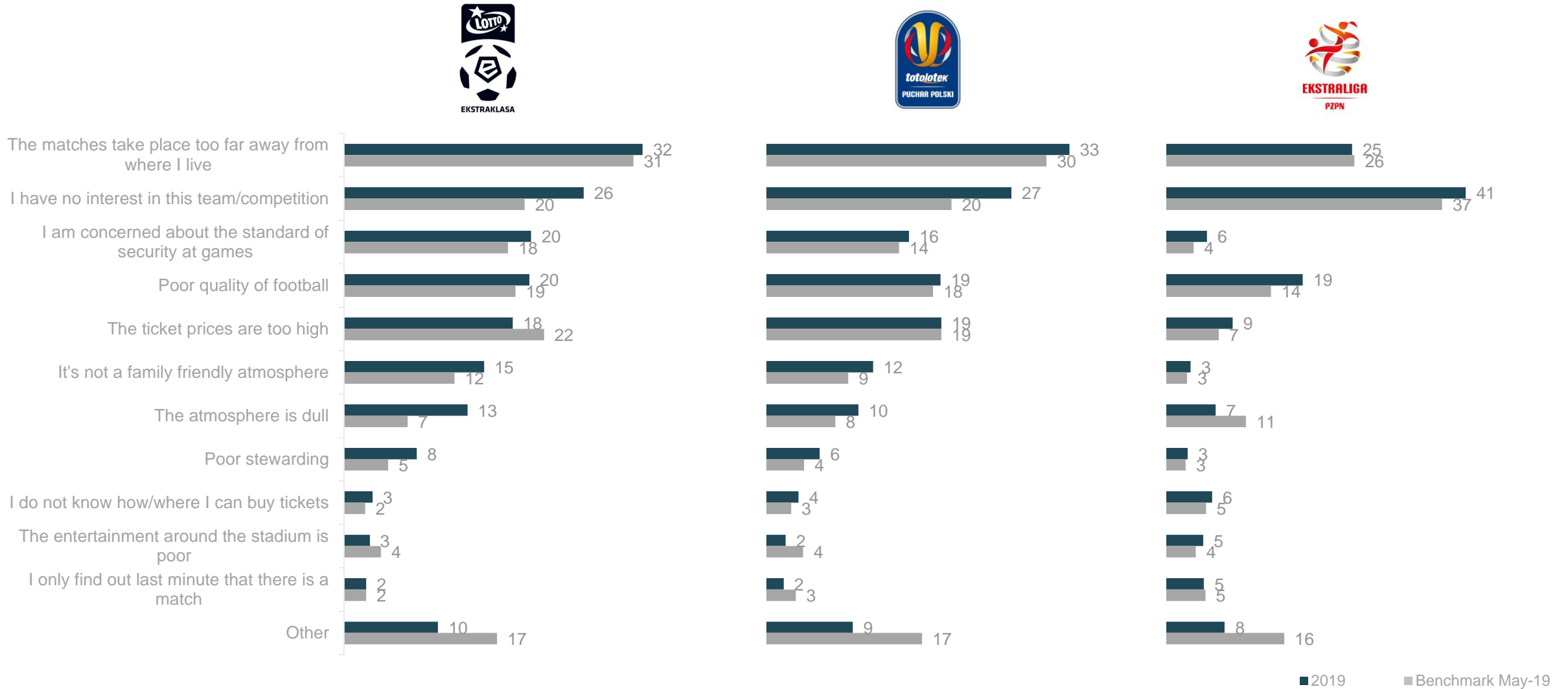
F15: Why do you not attend live matches for the following teams?

Base: Match going football fans not attending: 2019 Men's matches (298) Women's matches (495) Youth matches (476); Benchmark Men's matches (5726) Women's matches (10509) Youth matches (9150)

Club Football Attendance (%)



Reasons for not attending club team matches (%)



F15A: Why do you not attend live matches for the following competitions?

Base: 2019 Match going football fans not attending: Domestic League matches (329) Domestic Cup matches (379) Domestic Women's League matches (484); Benchmark May-19 Match going football fans not attending: Domestic League matches (3136) Domestic Cup matches (3727) Domestic Women's League matches (4868)

Attendance – key takeouts and potential actions



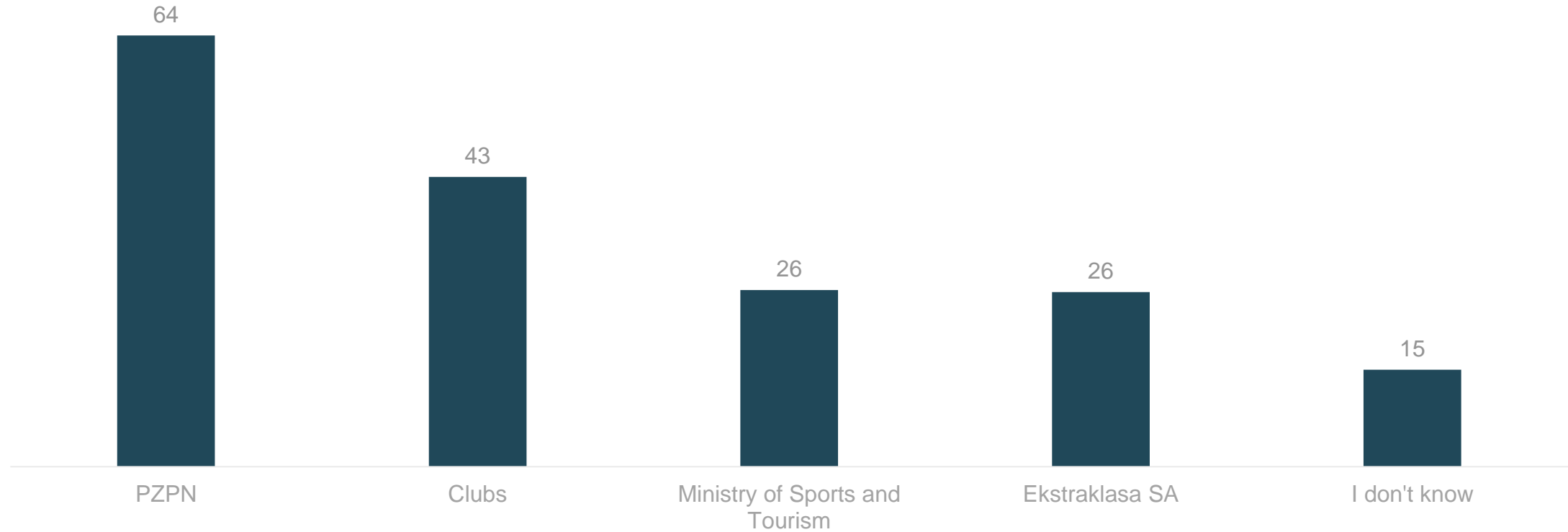
The attendance at men's, women's and youth national teams matches is higher compared with the European benchmark. 4 in 10 football fans fall into a committed group that attend either most or some matches of the men's national team. The club team attendance is also higher than the European benchmark. All the above numbers are very encouraging and show that investment in the infrastructure, which has taken place in Poland in the last years, is starting to pay off.



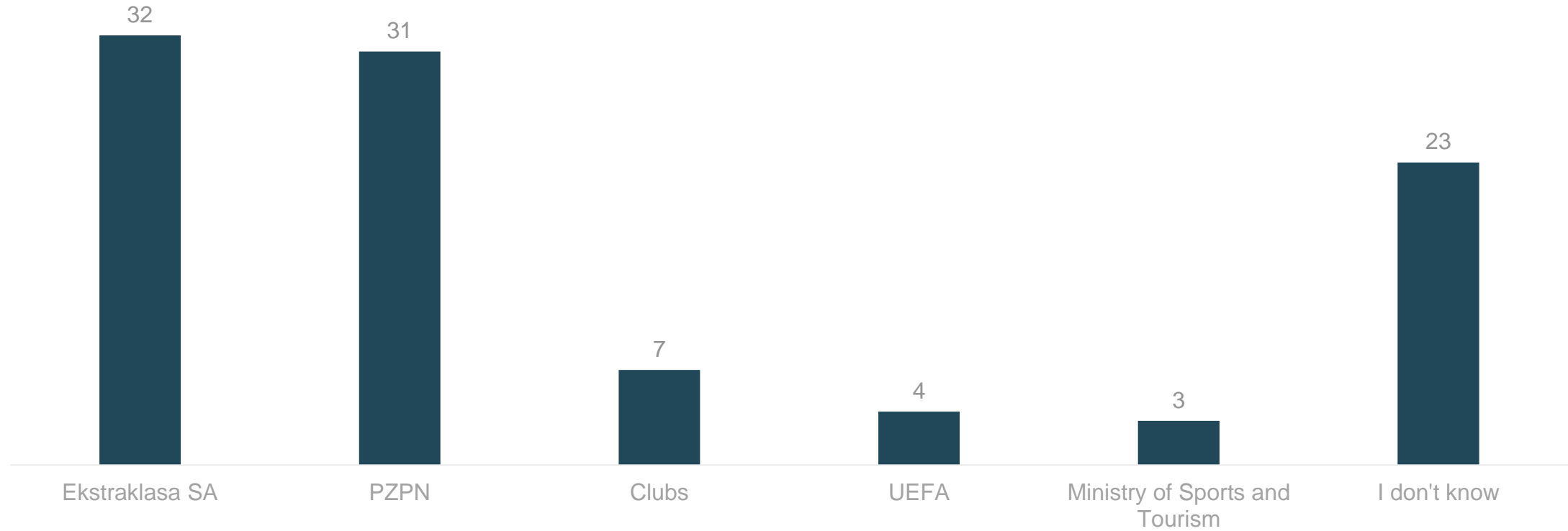
To even further improve attendance at men's national team matches the issue of the proximity of games need to be minimised. The distance is stated as the main barrier along with the ticket prices. Currently most of the matches take place in Warsaw, with just some friendly matches taking places elsewhere. Playing national matches in a greater variety of stadiums would make games more accessible for fans who cannot easily get to Warsaw, especially on weekdays. PZPN should look at travel packages / transportation for fans that live outside of the Warsaw area.

National Association Imagery

Responsibility for the sports level of professional football clubs in Poland (%)



Running of Polish Ekstraklasa (%)



Polish organisations responsible for sport



1919-2019

Awareness of Polish sports organisations (%)

18-24: 78%
 25-34: 85%
 35-44: 90%
 45-54: 94%
 55-65: 91%

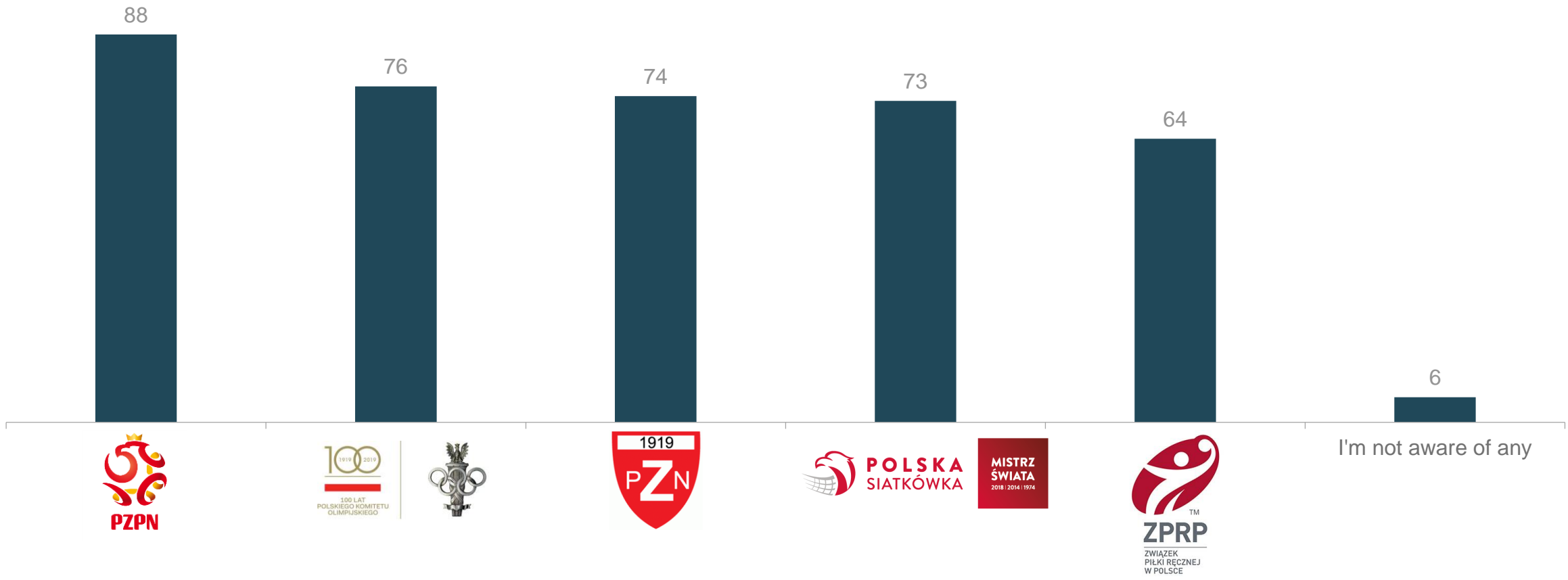
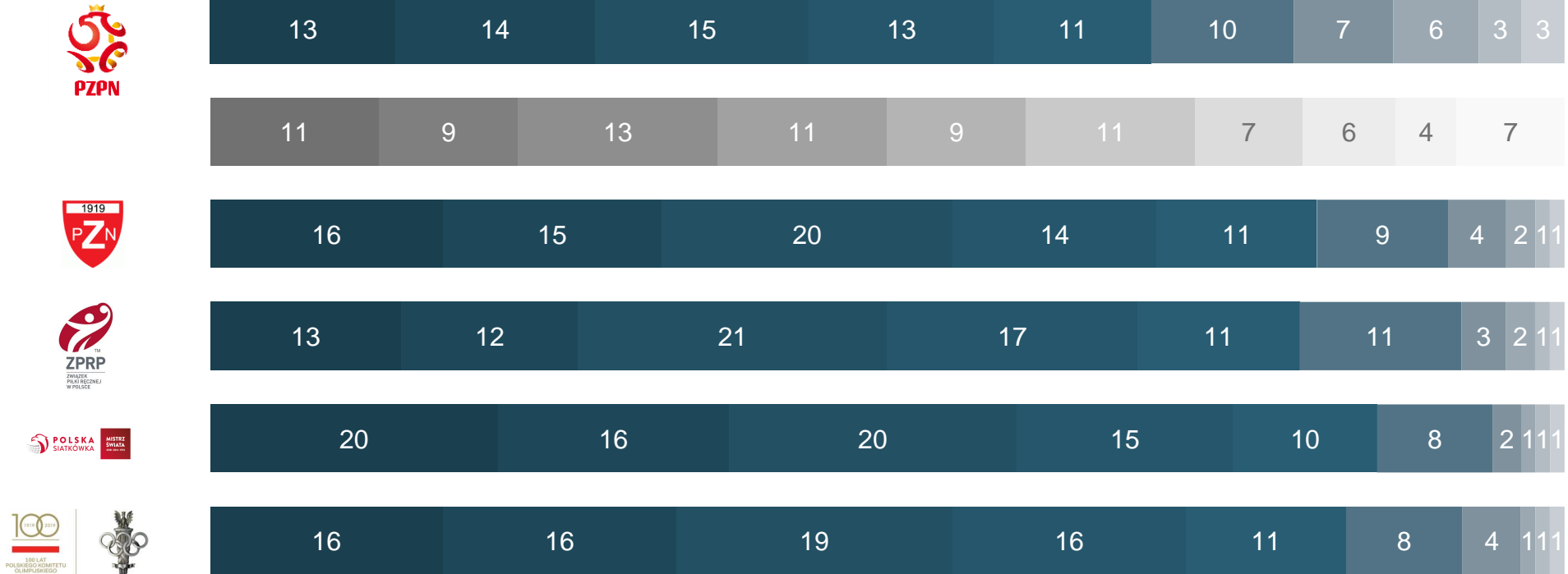


Image of sporting organisations (%)



■ Very positive image ■ 9 ■ 8 ■ 7 ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ Very negative image

Mean



■ 2019 ■ Benchmark May-19

Image of sporting organisations (%)

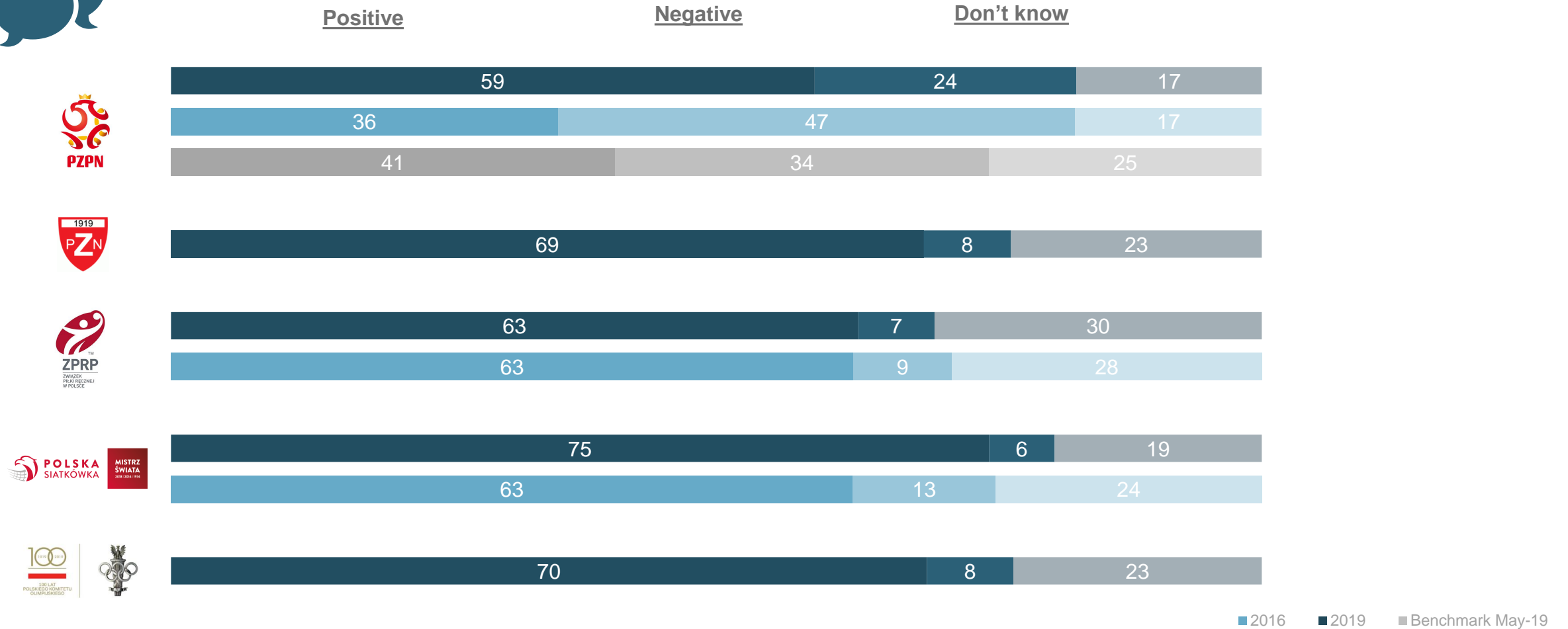
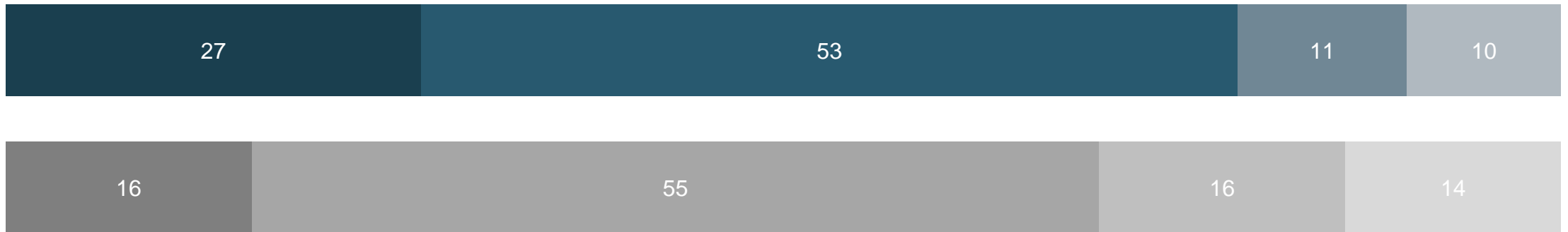


Image of the National Association – Change in Opinion (%)

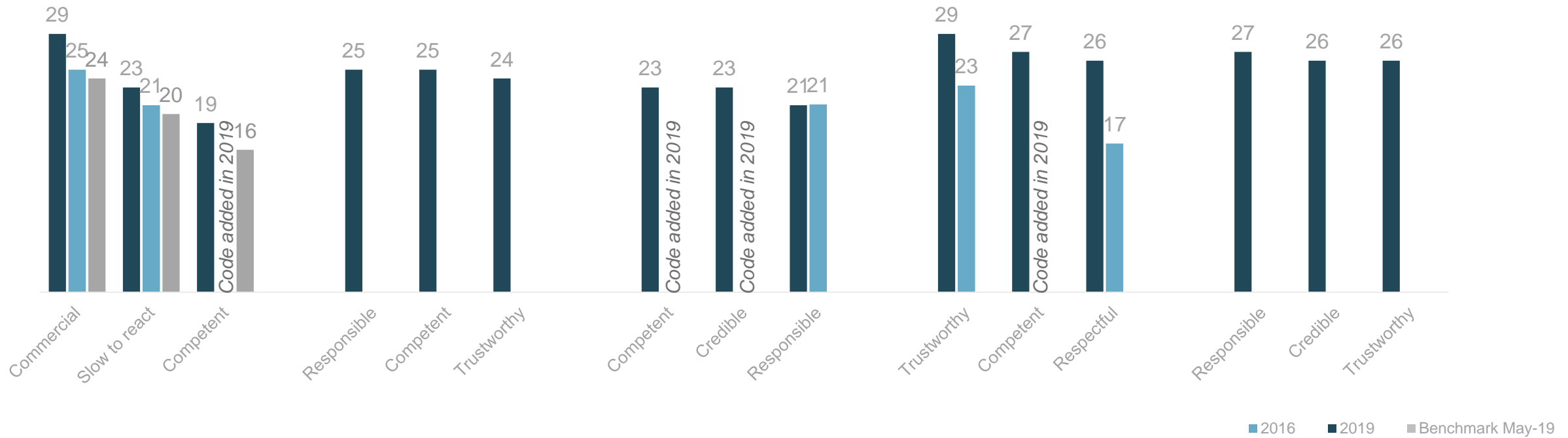


■ Yes, it is more positive
 ■ No, it has remained the same
 ■ Yes, it is more negative
 ■ Don't know

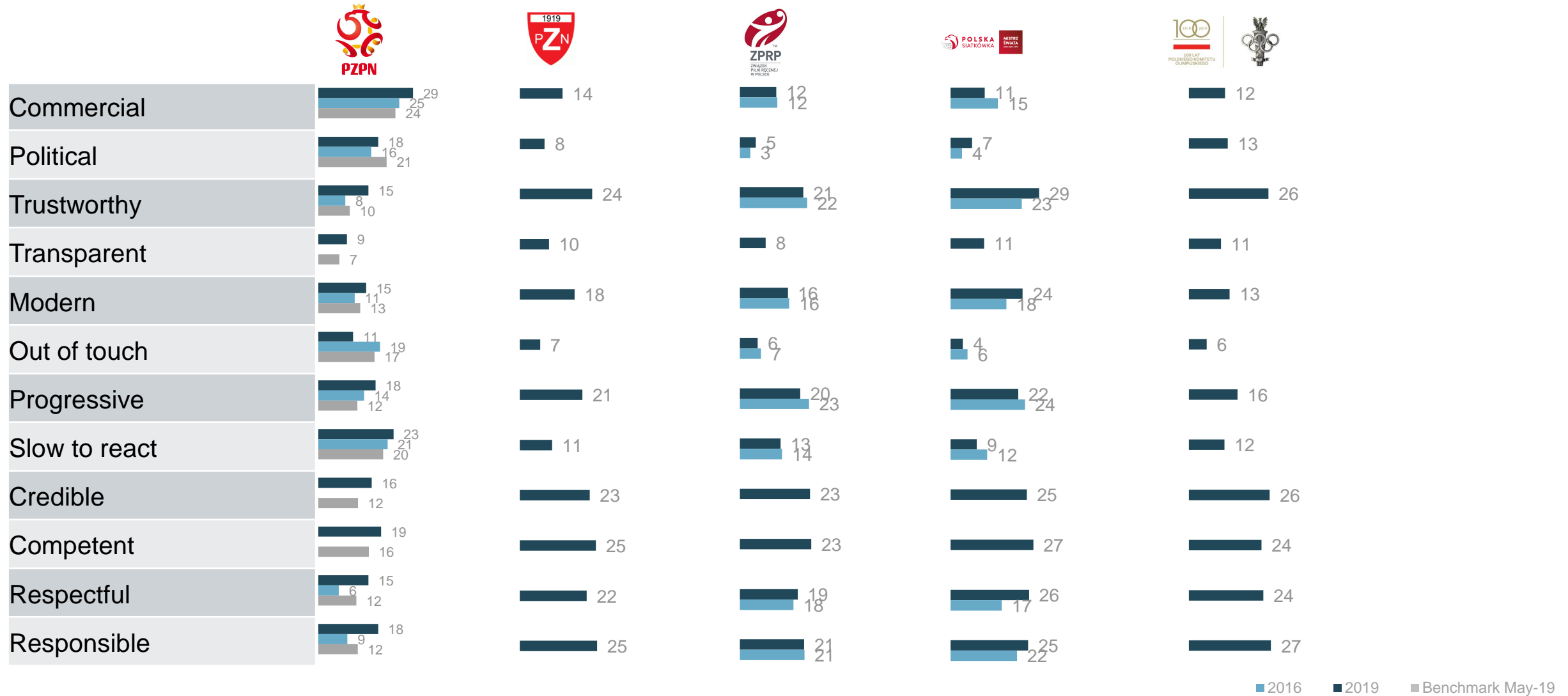


■ 2019
 ■ Benchmark May-19

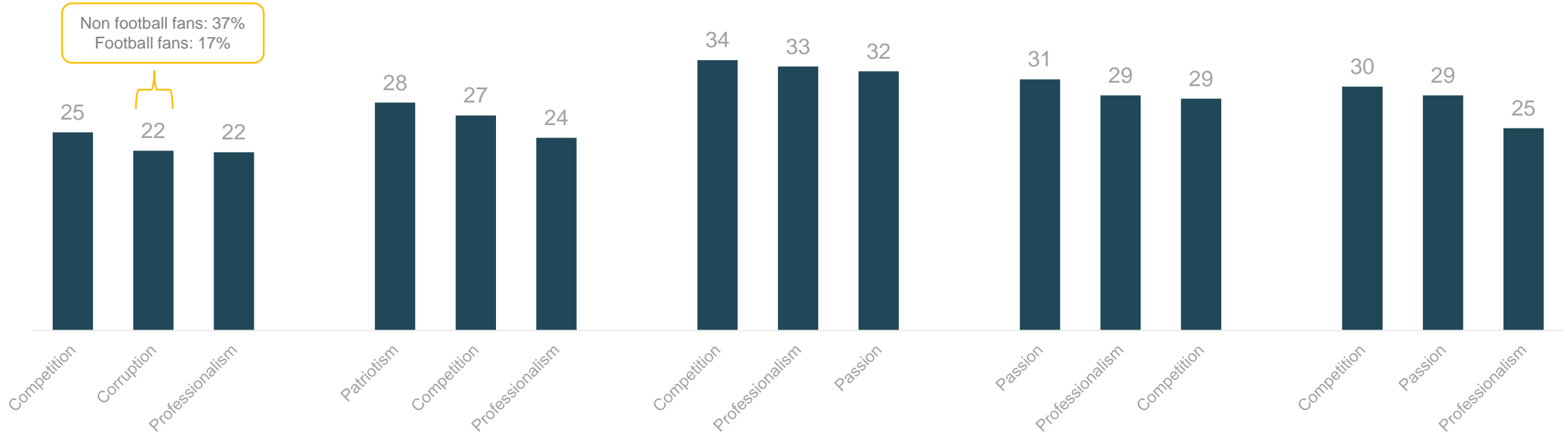
Imagery of National Associations – adult population (%)



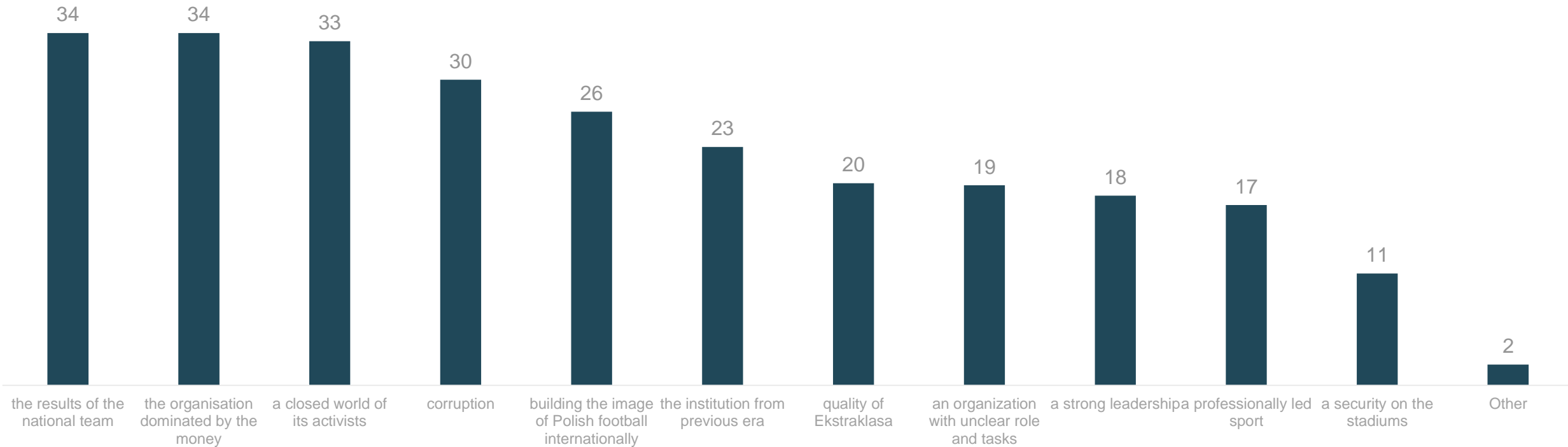
Imagery of national associations – adult population (%)



Values associated with sport organisations (%)



PZPN associations (%)



Success of Sporting Organisations (%)



■ Very Successful ■ 9 ■ 8 ■ 7 ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ Very Unsuccessful

Mean



6.2



6.0



7.2



6.9



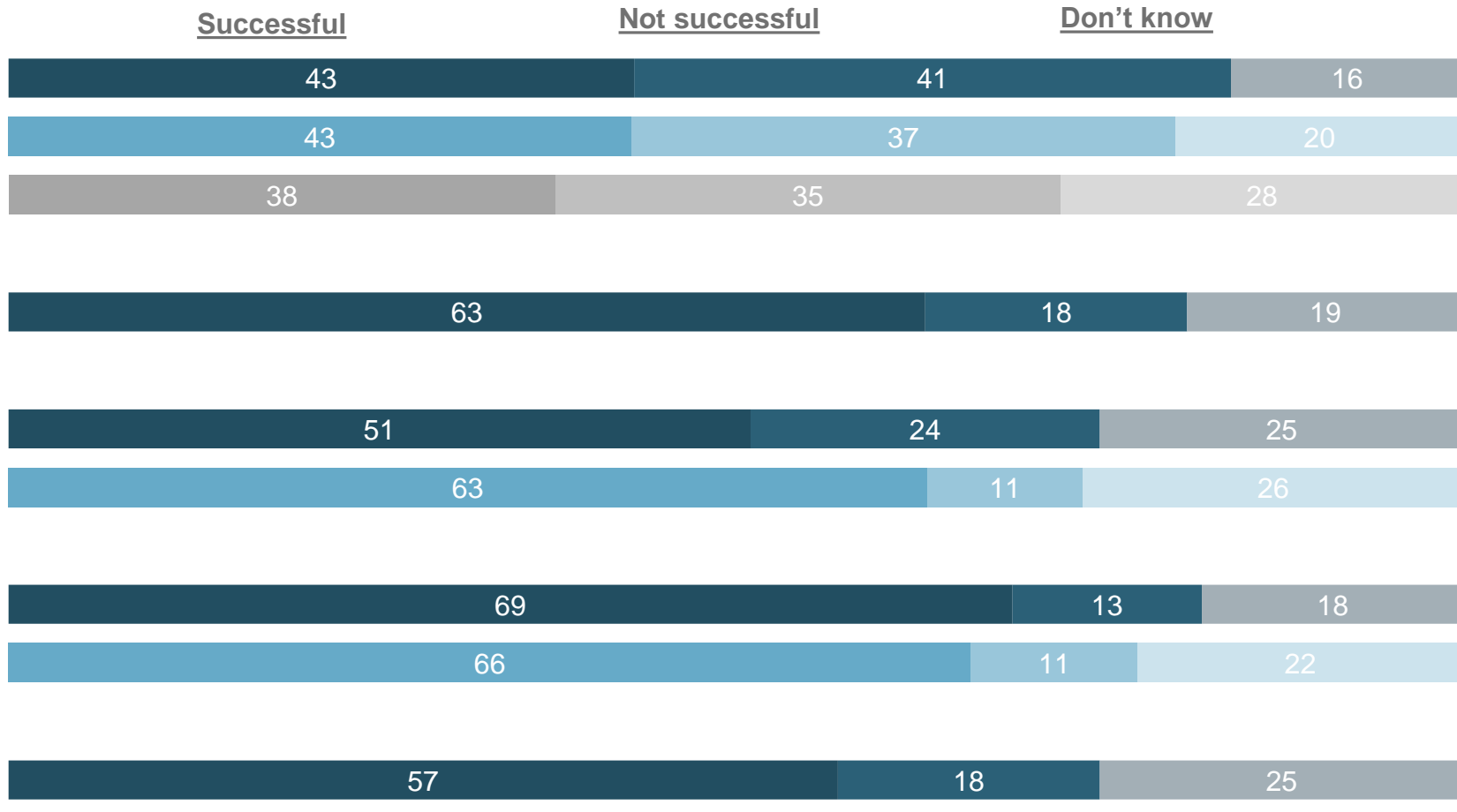
7.6



7.2

■ 2019 ■ Benchmark May-19

Success of Sporting Organisations (%)



■ 2016 ■ 2019 ■ Benchmark May-19

What does the National Association need to do to improve perceptions?

Theme 1 • Dominated by corruption, non-transparent with poor results

Theme 2 • Players earn too much money in relation to the results

Theme 3 • Unclear financial policy, bad youth training, lack of proper leadership

Theme 4 • Nothing but money, no change for years, poor representation

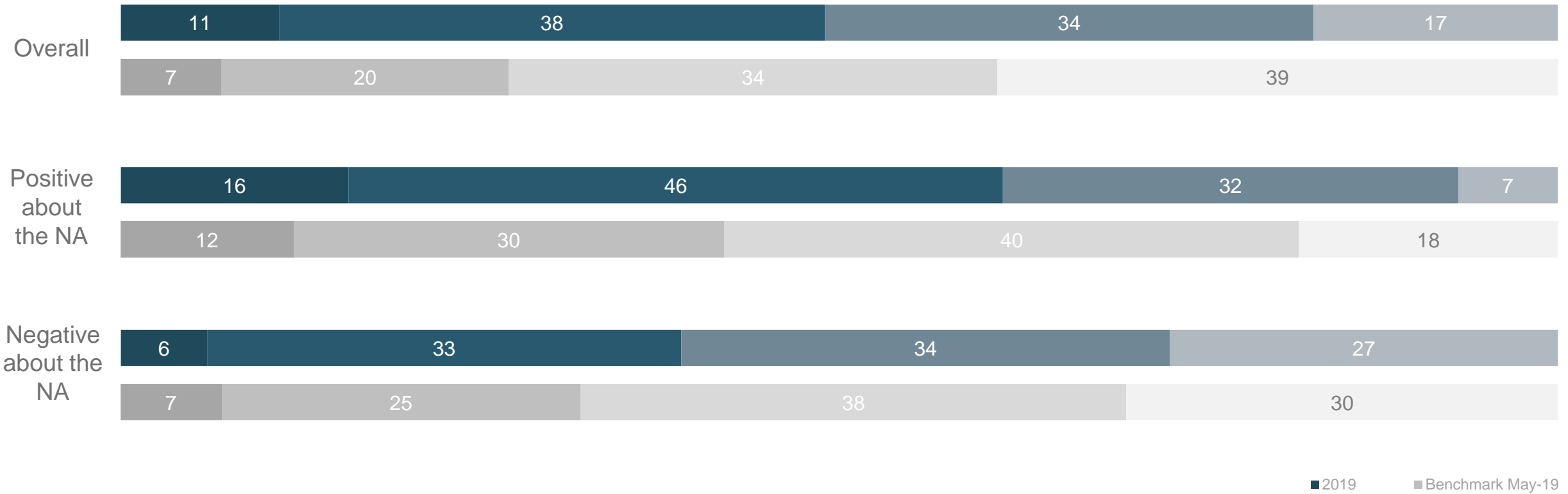
Theme 5 • People more caring about their position and earnings than for the development of sport

Theme 6 • Lack of development of young footballers

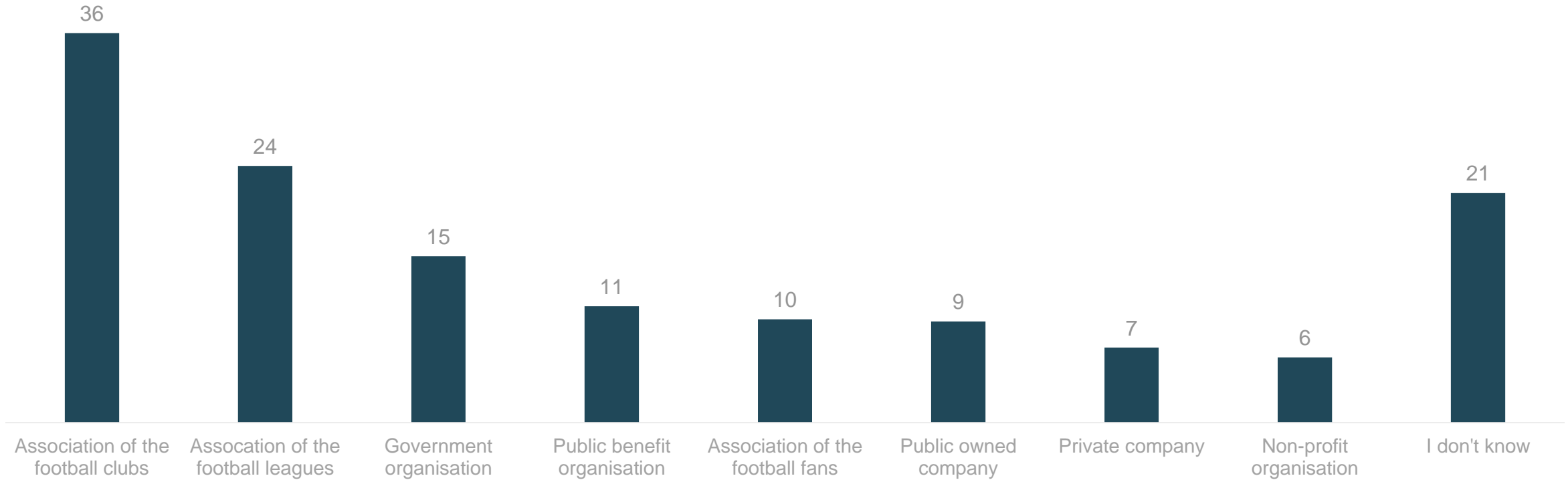
Understanding what the National Association does (%)

Are respondents confident that they know what National Association does in leading, managing and overseeing football?

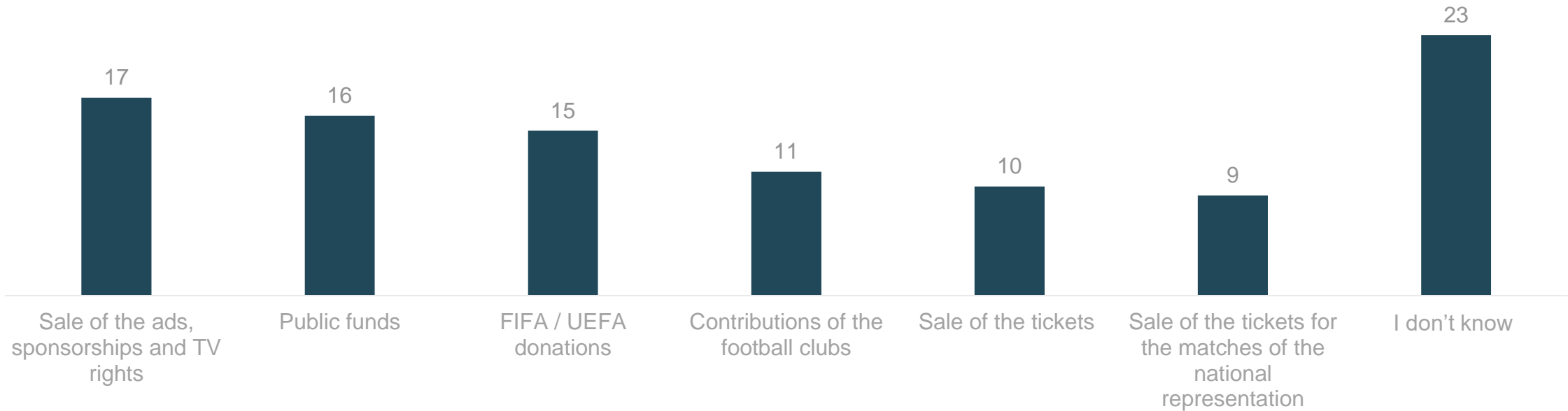
■ Very confident
 ■ Quite confident
 ■ Not very confident
 ■ Not confident at all



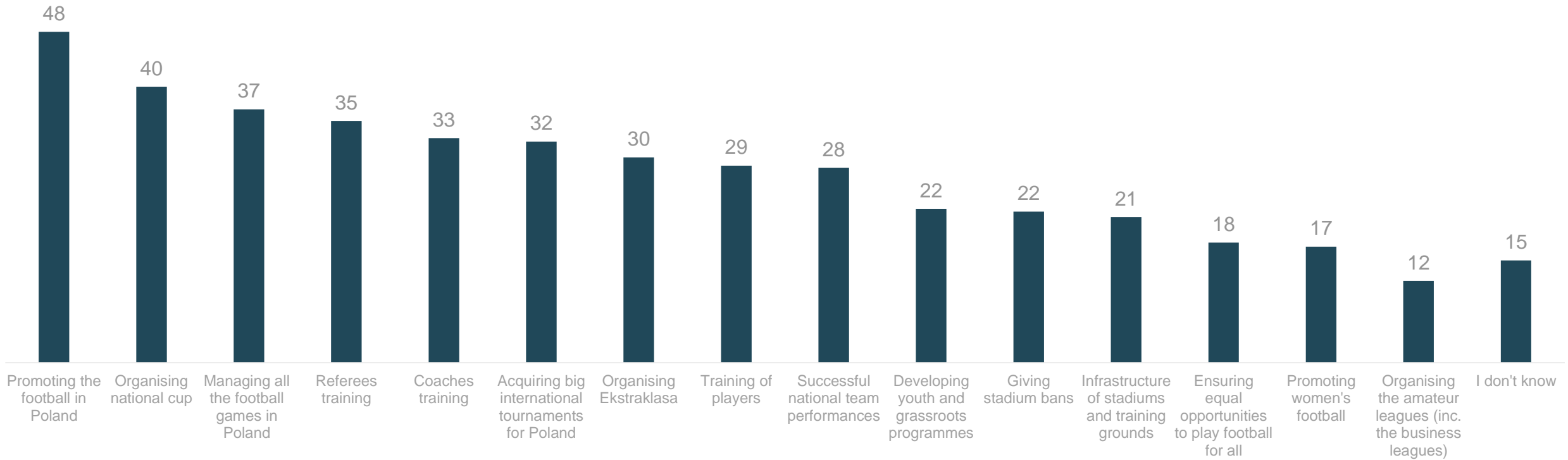
What is PZPN? (%)



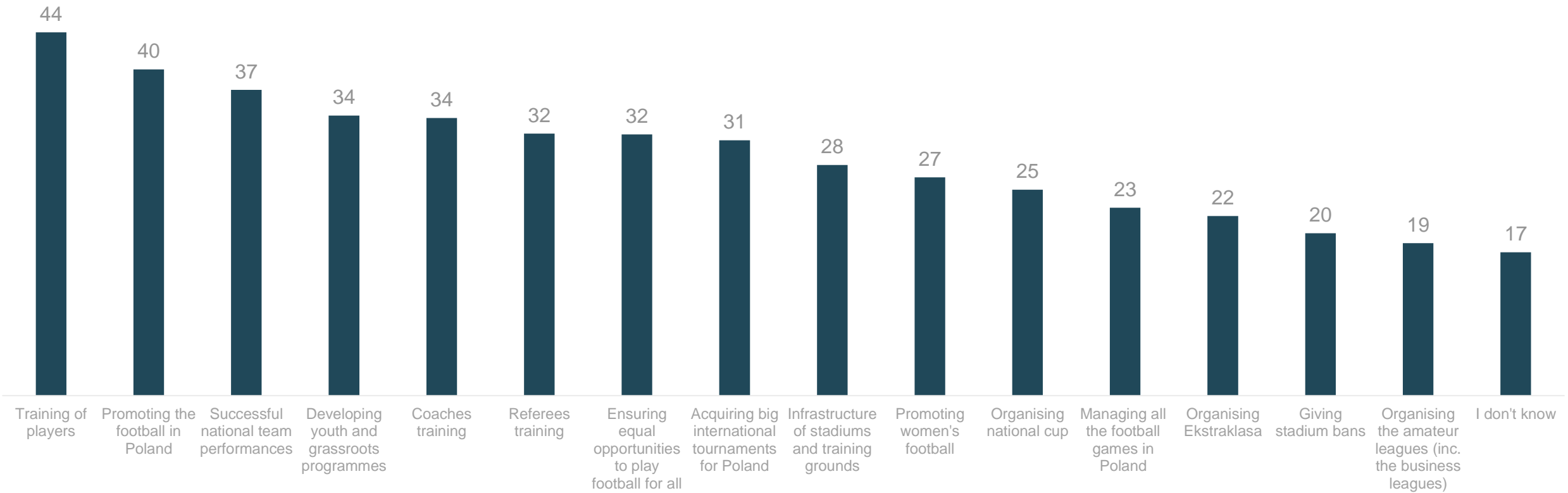
Main source of financing of the PZPN (%)



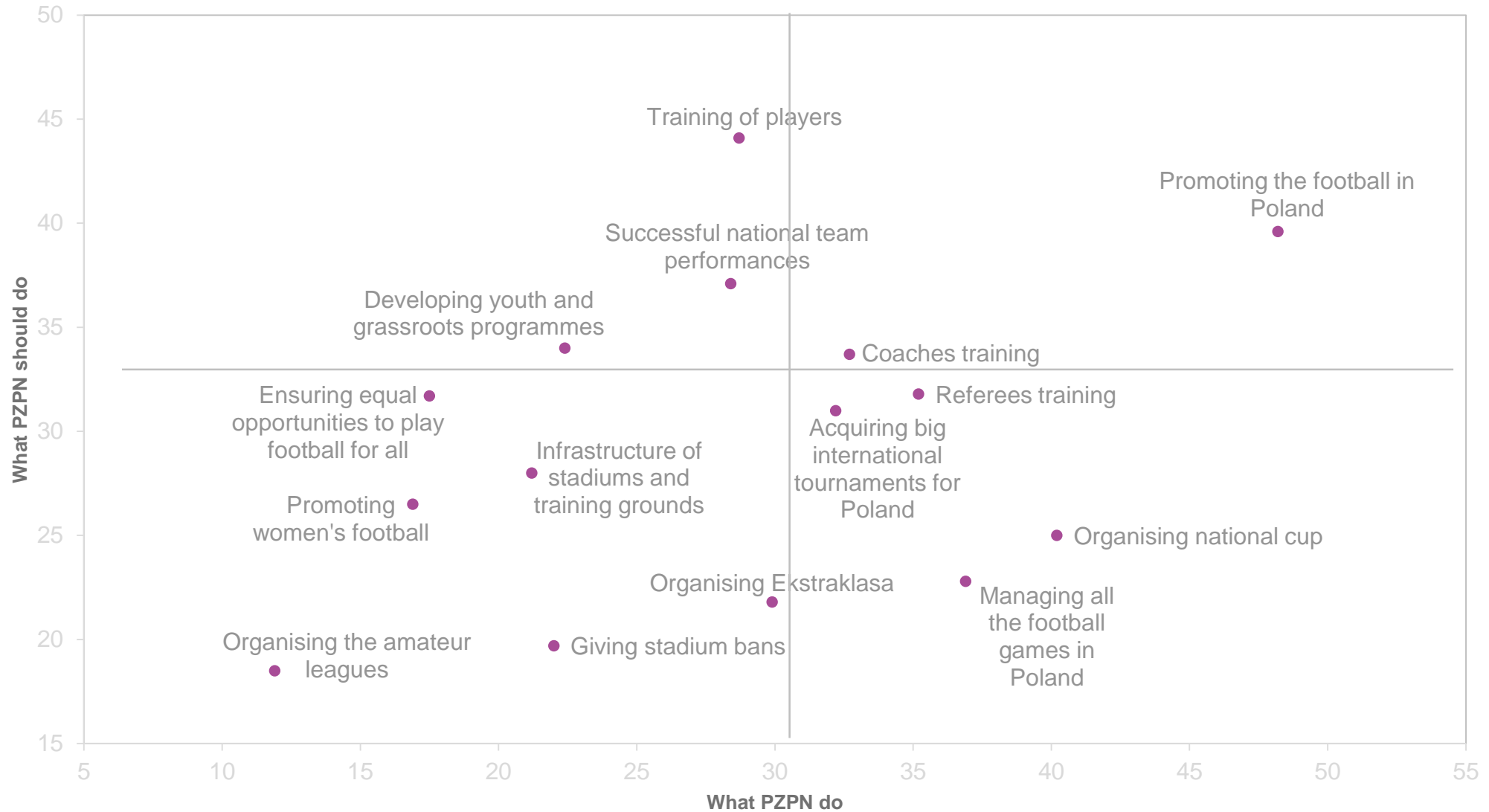
What does the Polish Football Association (PZPN) do? (%)



What should the Polish Football Association (PZPN) do? (%)

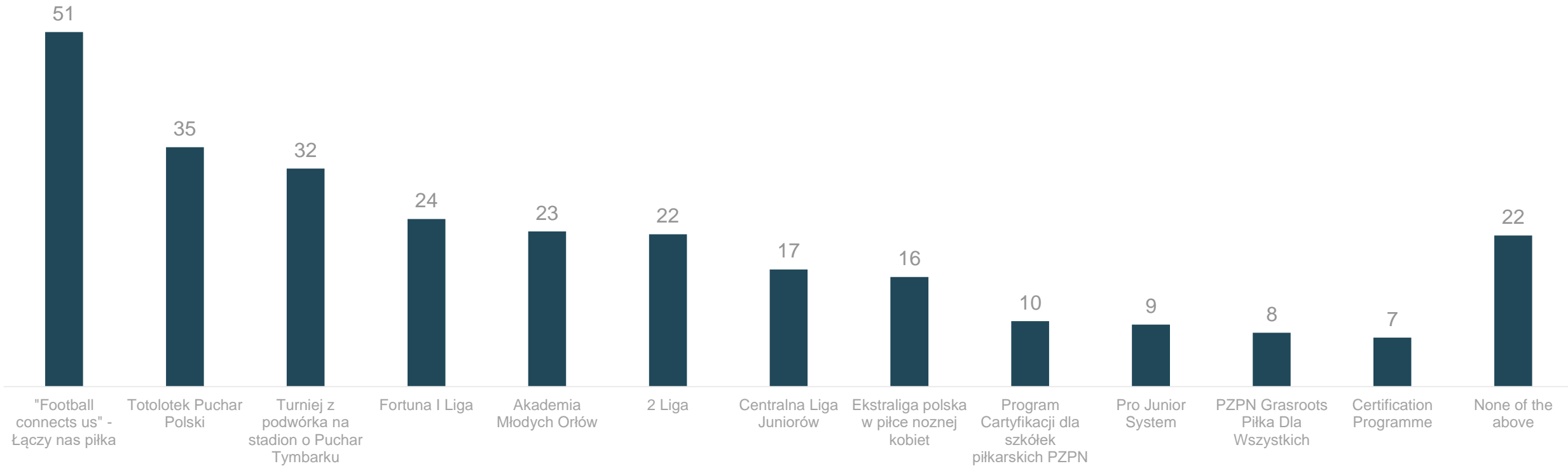


What PZPN do vs what PZPN should be doing (%)

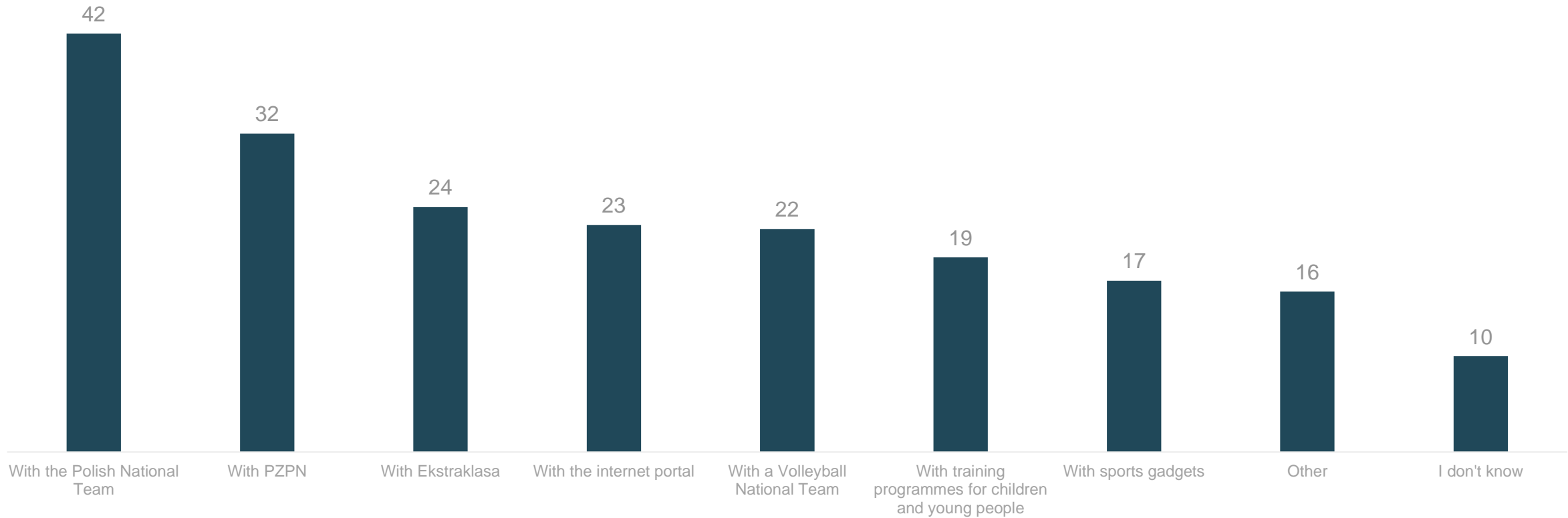


PL5: What does the Polish Football Association (PZPN) do?
 PL6: What should the Polish Football Association (PZPN) do?
 Base: All respondents (1001)

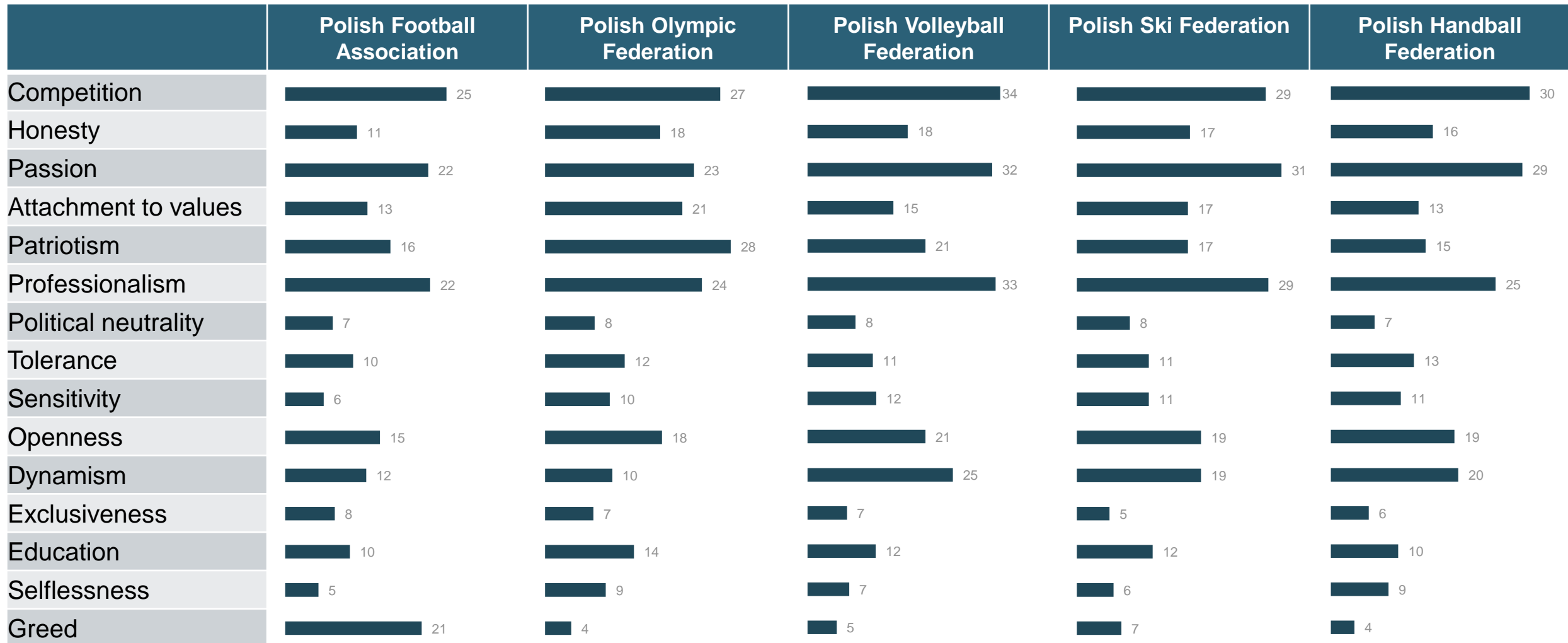
Initiatives awareness (%)



PZPN's 'Łączy nas piłka' slogan associations (%)



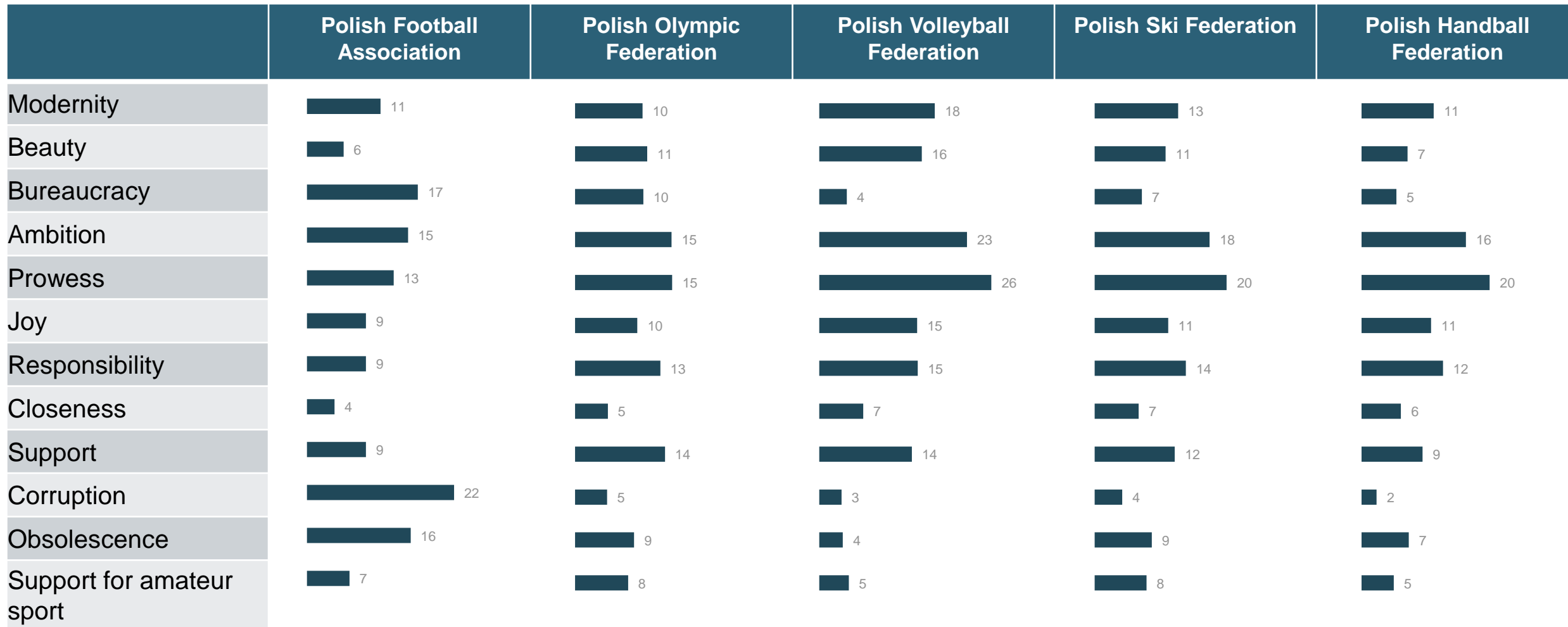
Values of sport organisations (%)



PL9: Please indicate which of the sports organisations visible on the screen match the following values and statements.

Base: Respondents aware of: Polish Football Association (882), Polish Olympic Federation (764), Polish Volleyball Federation (730), Polish Ski Federation (742), Polish Handball Federations (645)

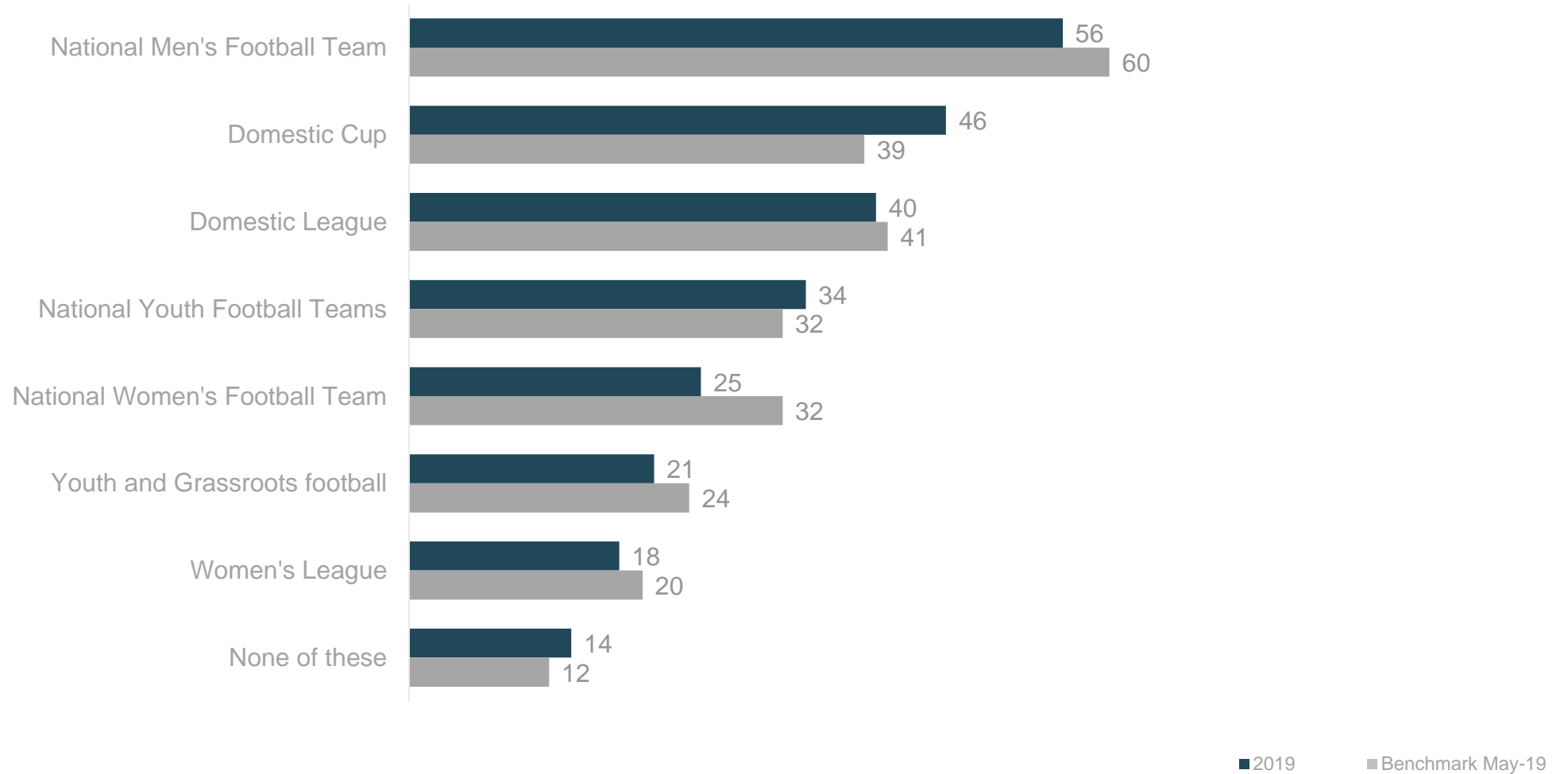
Values of sport organisations (%)



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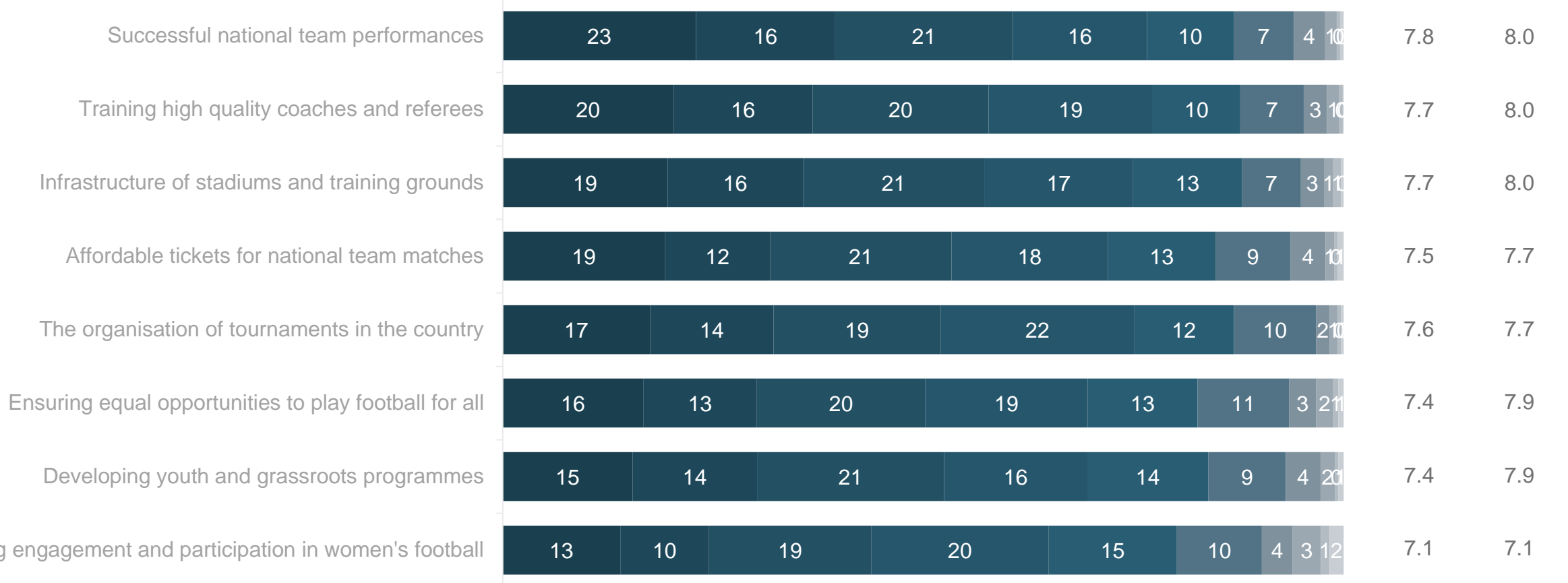
Associations with National Associations (%)



Important factors in running a successful football federation (%)

■ Very Important ■ 9 ■ 8 ■ 7 ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ Not at all important

Mean BM mean

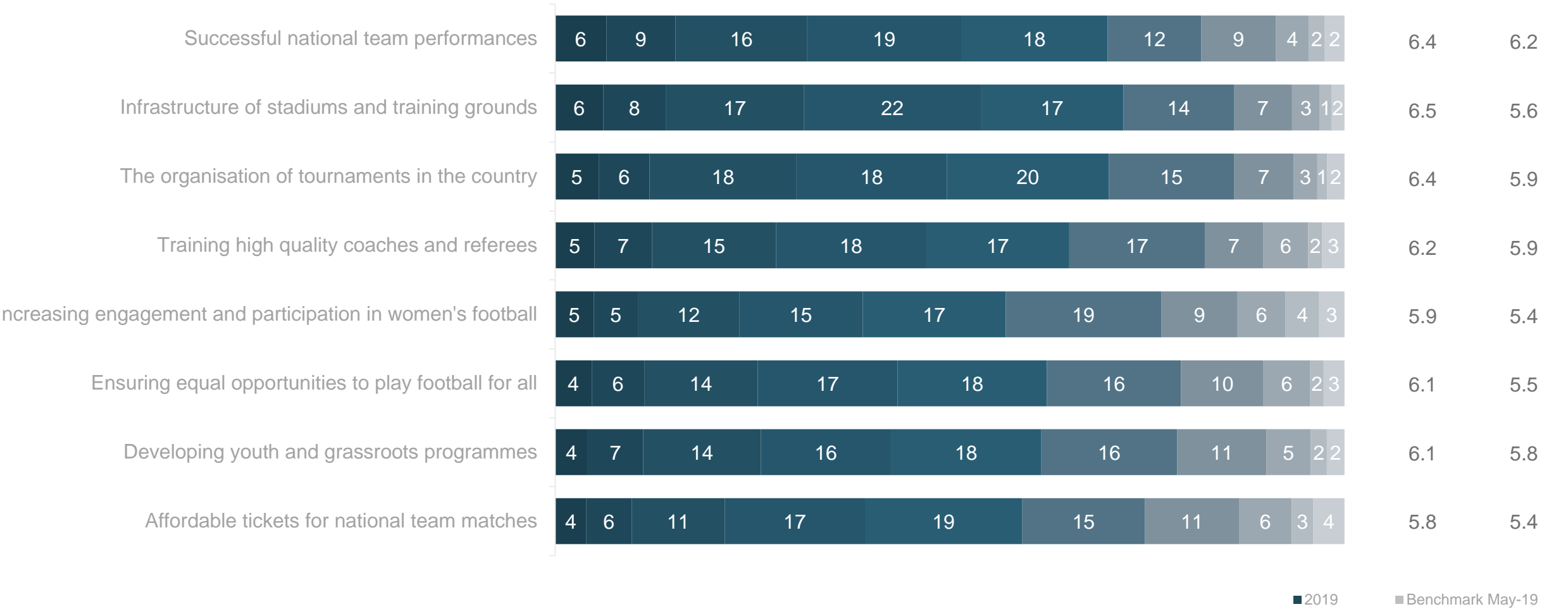


■ 2019 ■ Benchmark May-19

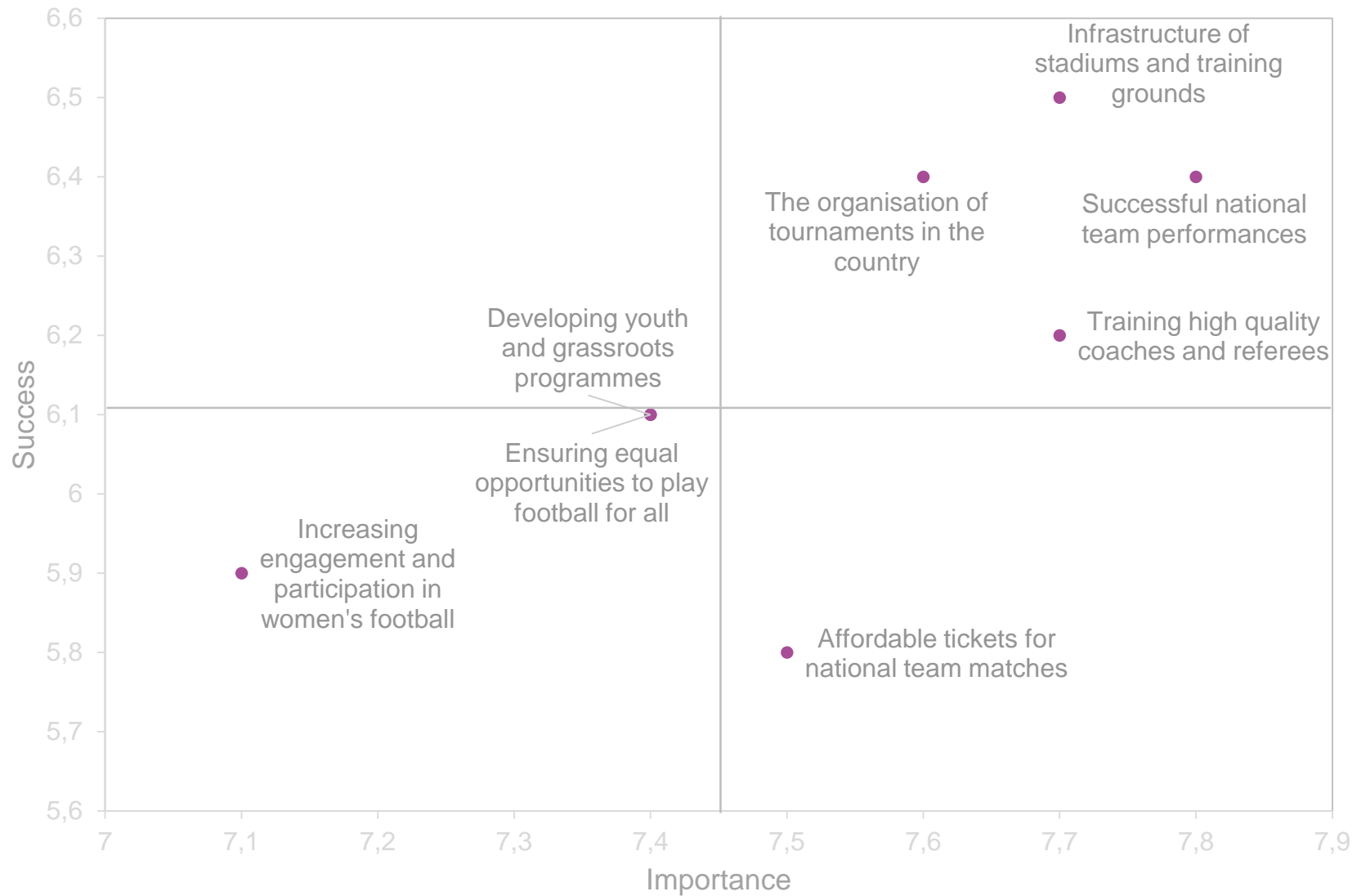
Success of the National Association (%)

Very Successful 9 8 7 6 5 4 3 2 Very Unsuccessful

Mean BM mean



Importance of factors vs. Success of The PZPN (%)



NA9. How important are each of these factors in running a successful football federation?
 NA10. How do you rate the success of the National Association in each of the following?
 Base: Football fans (701)

National Association Imagery – Key takeouts and potential actions



59% of respondents have a positive image of the PZPN, which has improved since 2016 by 23% and is strongest amongst football fans (69%) and current football players (74%). Associations of PZPN with more positive connotations such as trustworthy, respectable and responsible have all increased since 2016, whilst its association with ‘out of touch’ has declined by 8%.



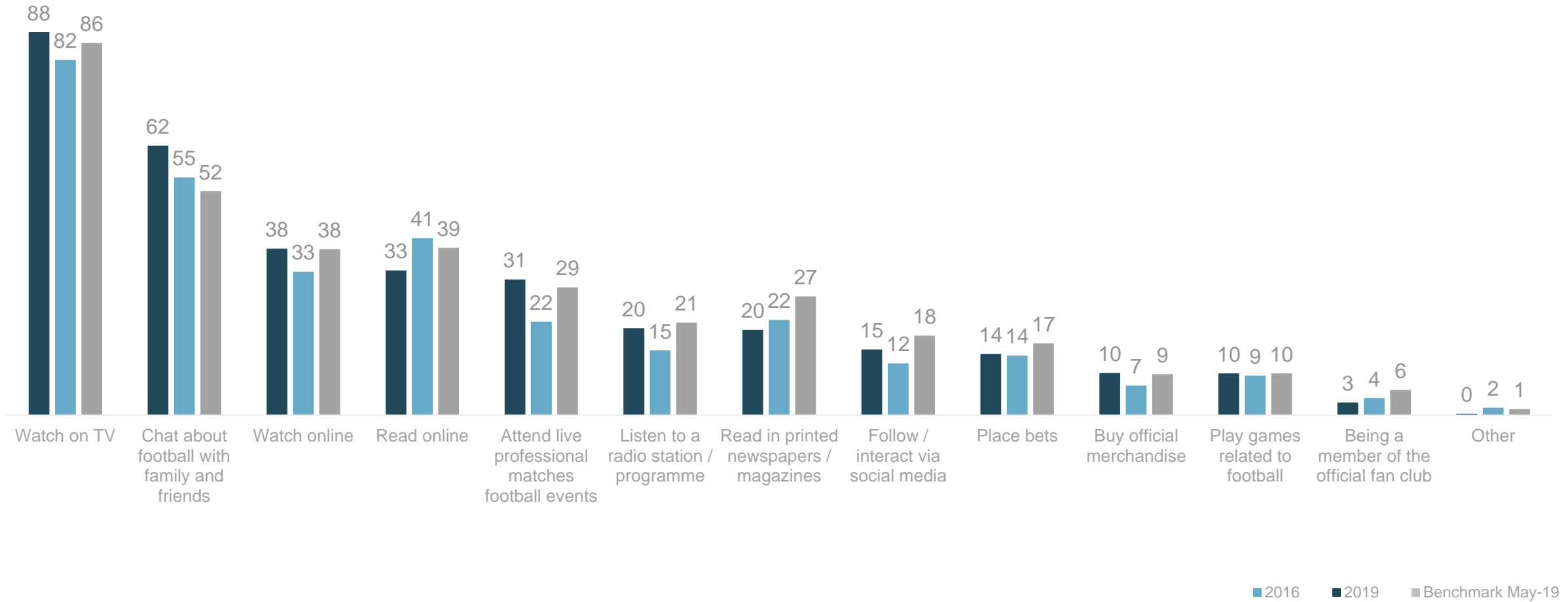
However, over half of the respondents (51%) don’t have the clear understanding of what the association does and what its responsibilities are. There also seems to be confusion as what its main source of financing is. Furthermore, The PZPN scores below the European benchmark for associations with youth and grassroots football.



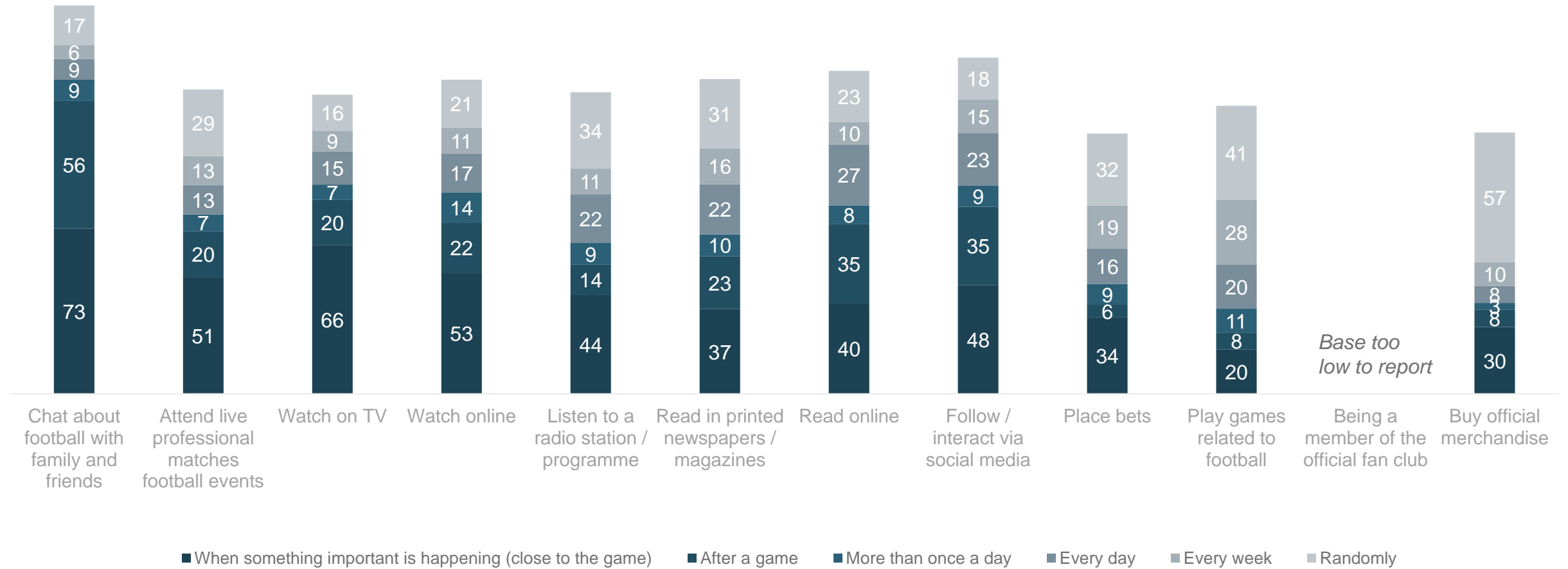
The good work in the last years is clearly paying off, however there still is a group of people who have not been convinced that PZPN has been fully modernised. PZPN scores lower than other sporting federations and those who have a bad perception tend to still associate it with corruption, money and insufficient grassroots development. Thus, the PZPN should look at ways to further promote its great work, either locally or in the national media, so that the whole population can see the recent improvements. Furthermore, the PZPN should investigate developing a clear communication strategy to better promote grassroots football initiatives.

Communications

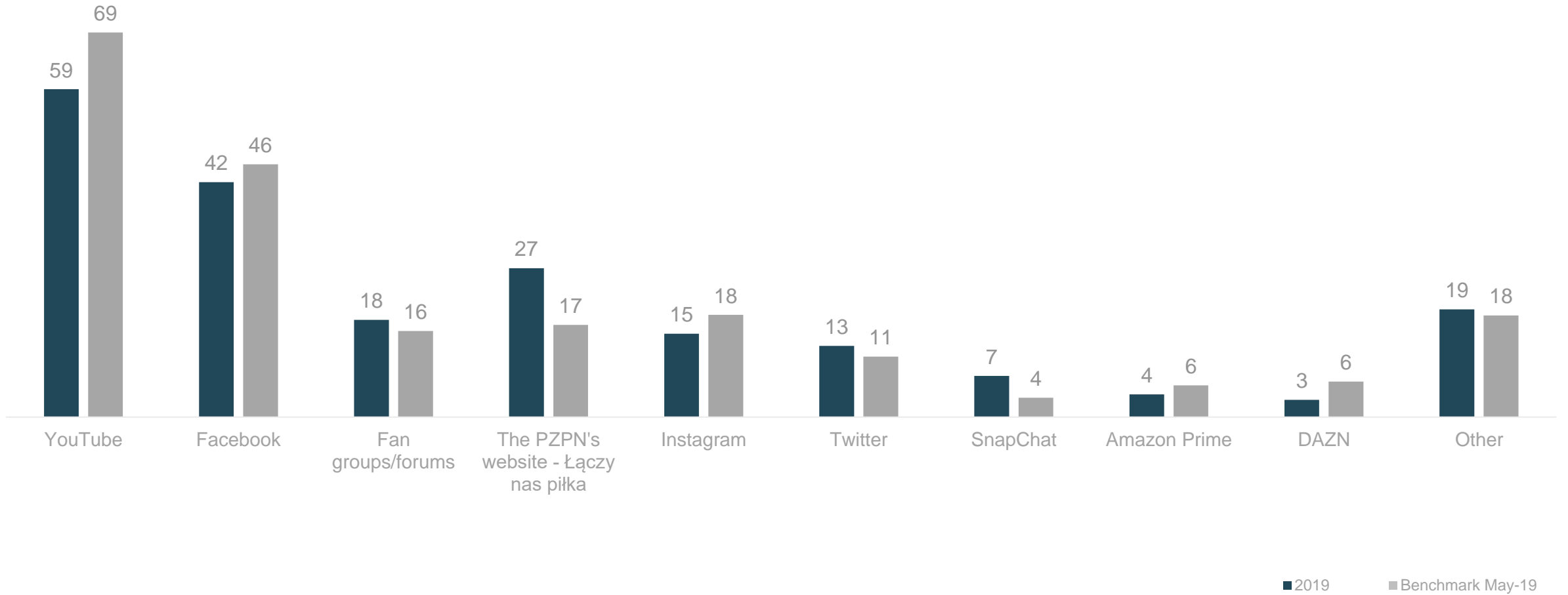
Football consumption among football fans (%)



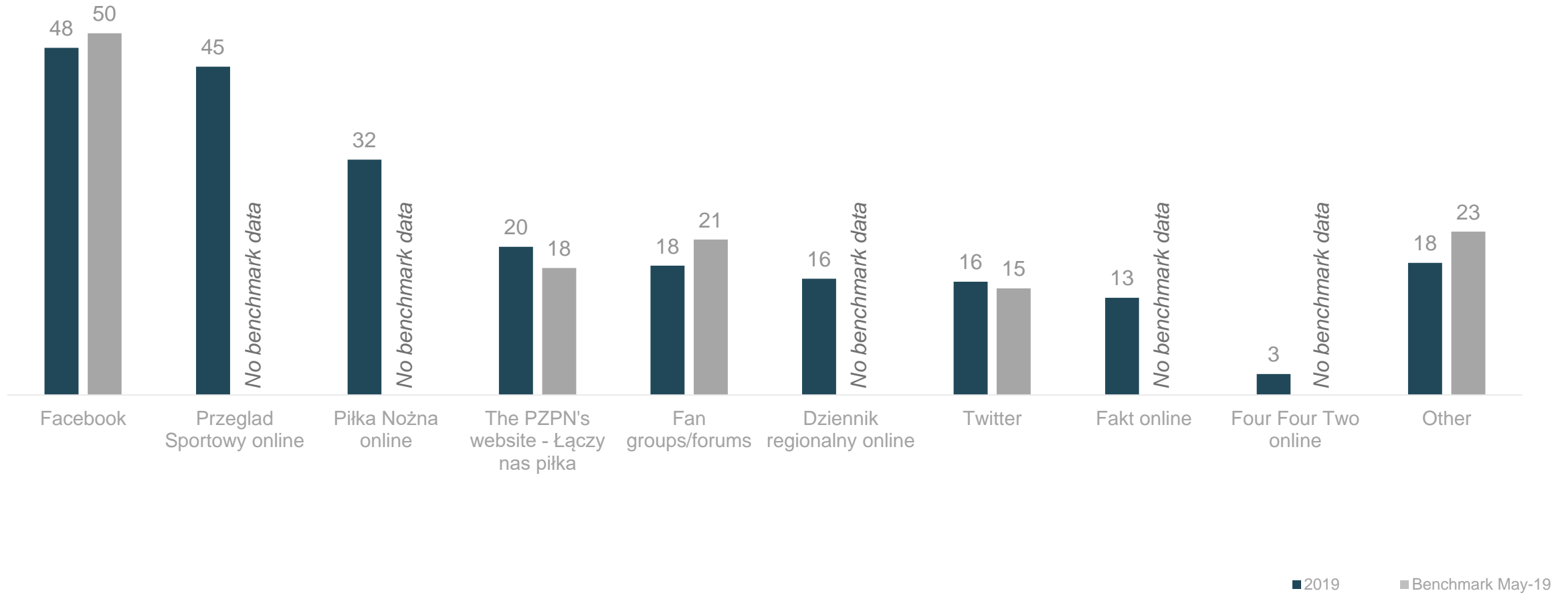
Time of following football (%)



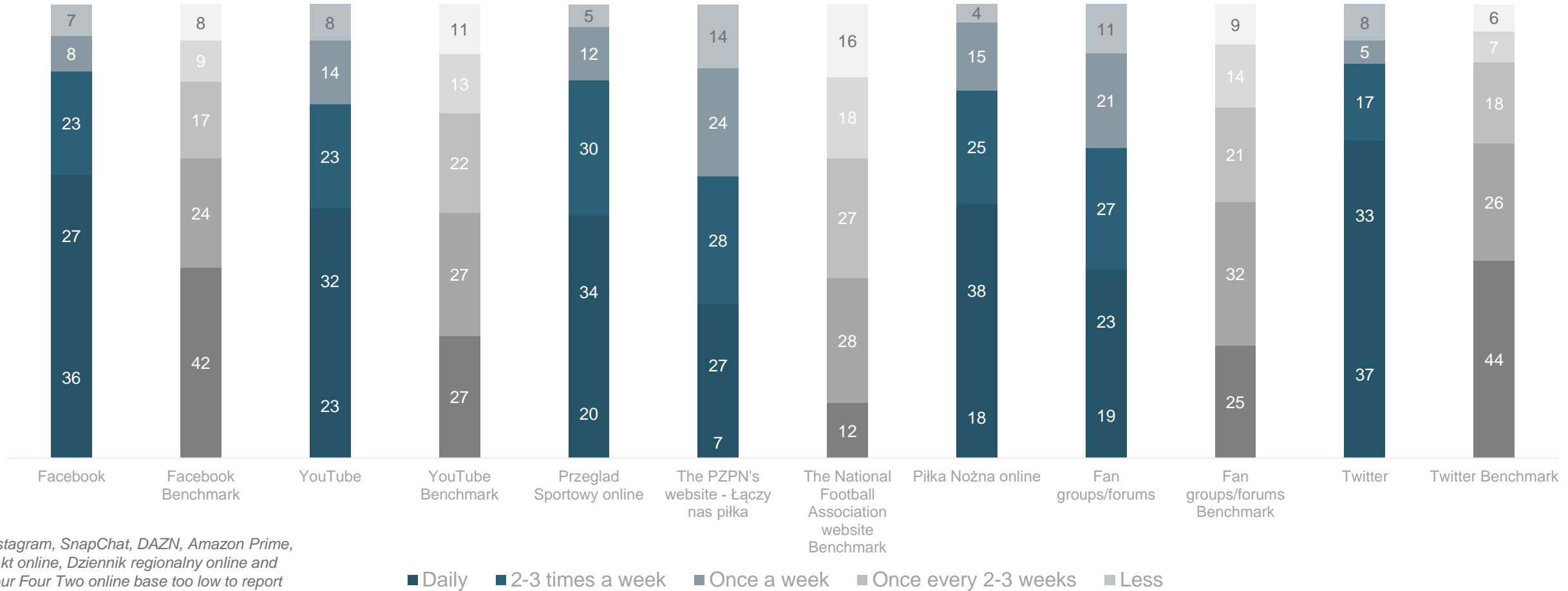
Football Consumption – Watching Online (%)



Football Consumption – Reading Online (%)



Frequency of usage (%)

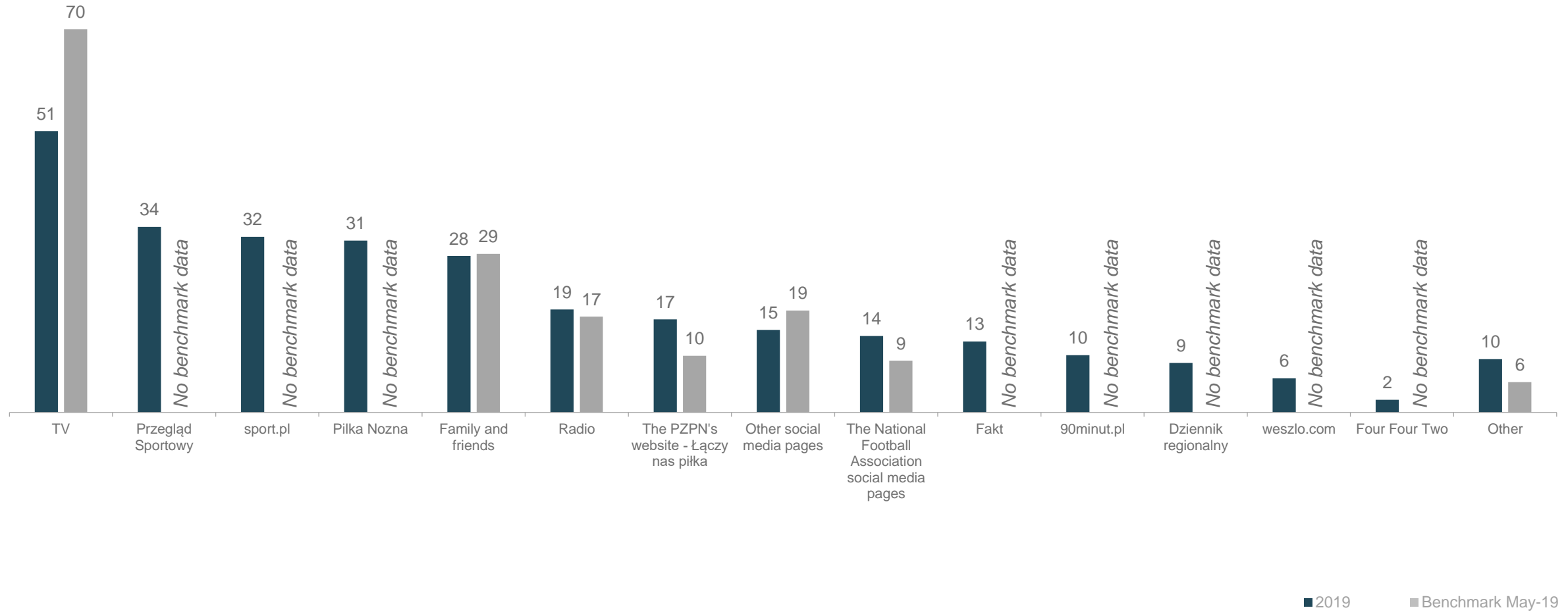


Instagram, SnapChat, DAZN, Amazon Prime, Fakt online, Dziennik regionalny online and Four Four Two online base too low to report (below 50)

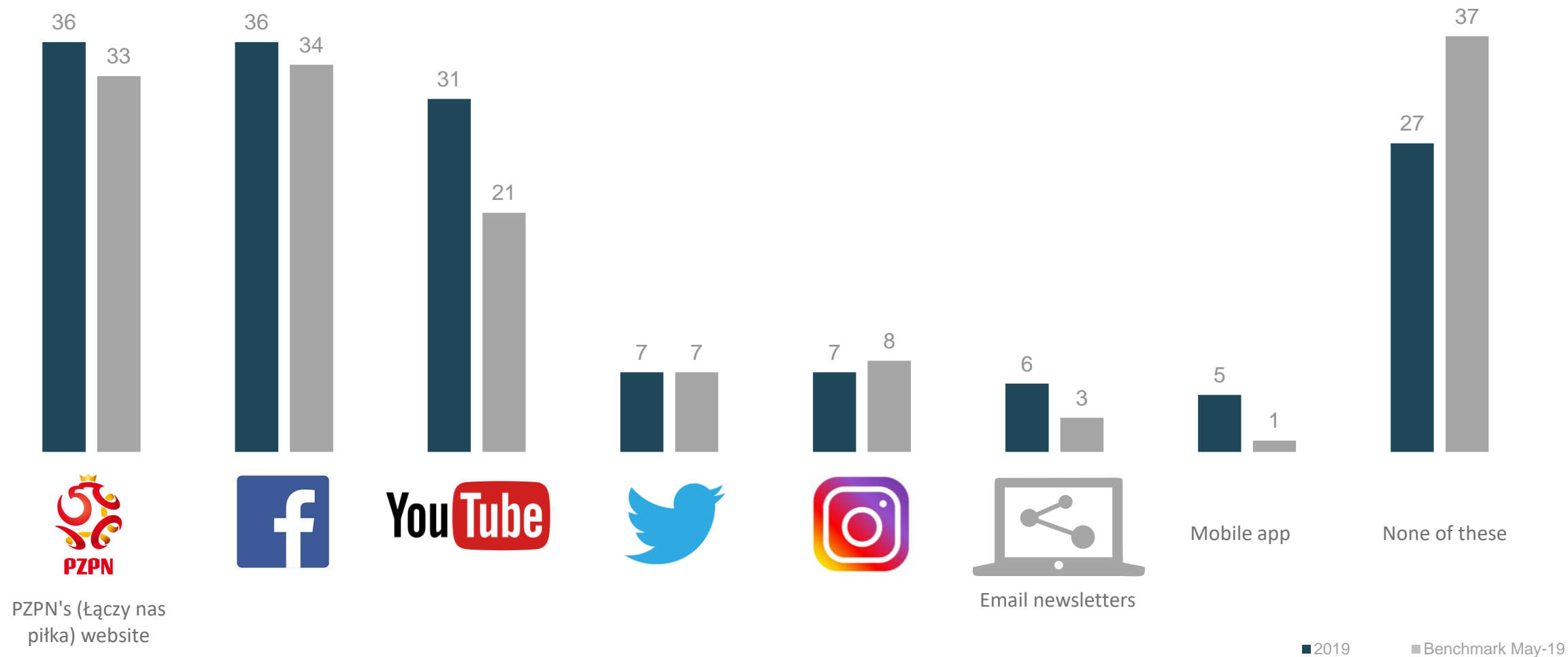
C4: How regularly do you use these for following football?

Base: Those watching or reading about football online: Fan groups/forums (81), The National Football Association website (112), Facebook (198), Twitter (64), YouTube (176), Instagram (45), SnapChat (22), DAZN (9), Amazon Prime (12), Przegląd Sportowy online (127), Fakt online (38), Dziennik regionalny online (45), Piłka Nożna online (91), Four Four Two online (8)

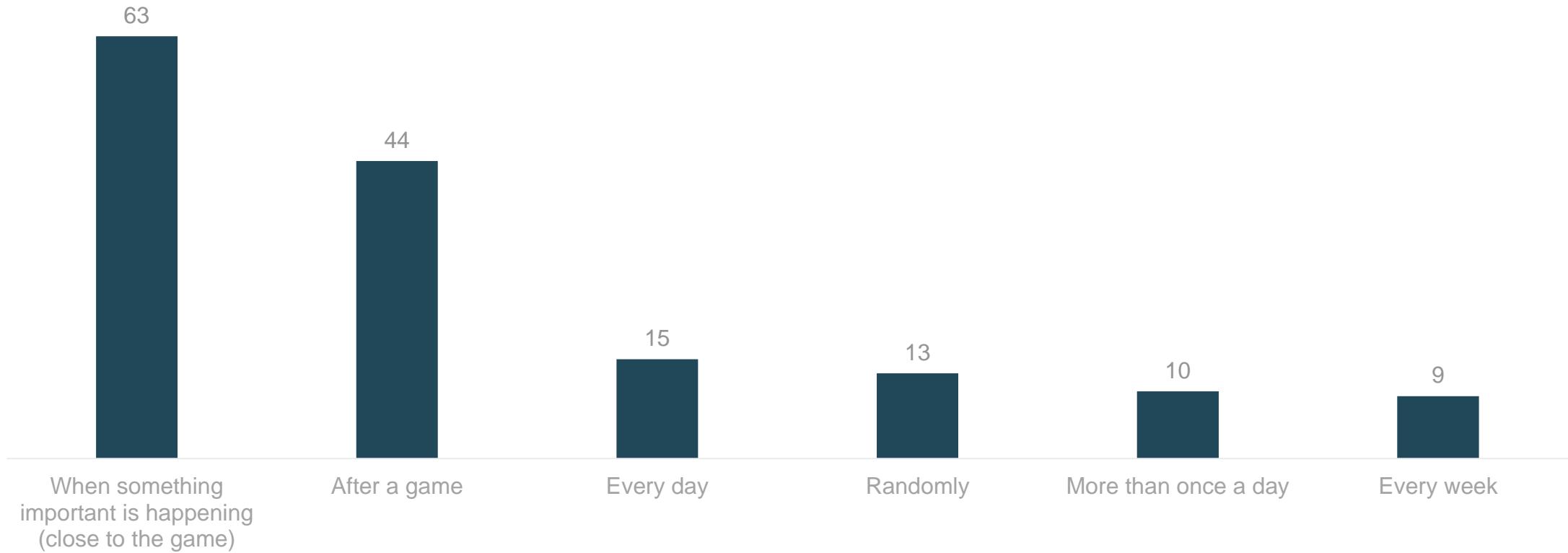
National Men's Football Team News (%)



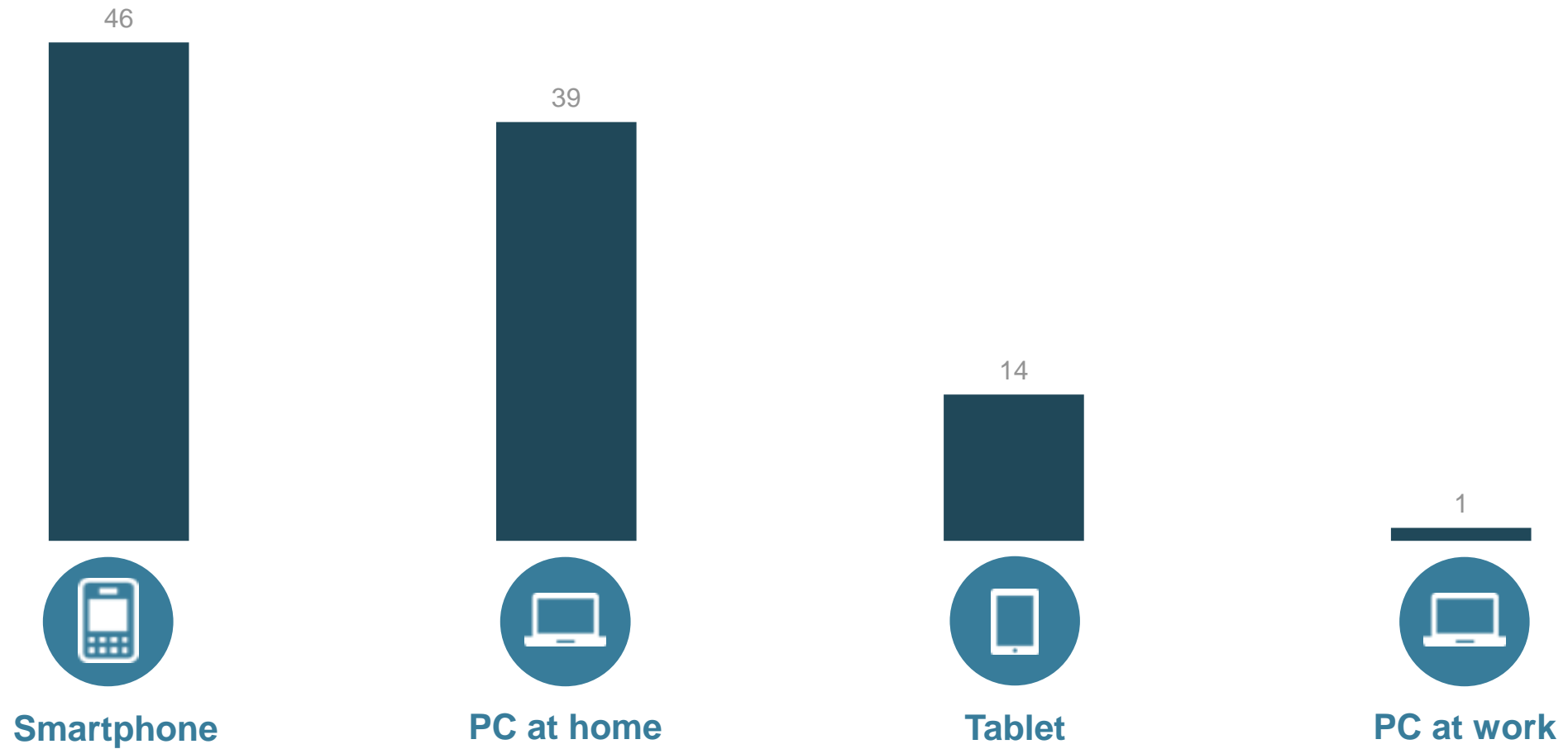
Usage of the National Association's Communication Channels (%)



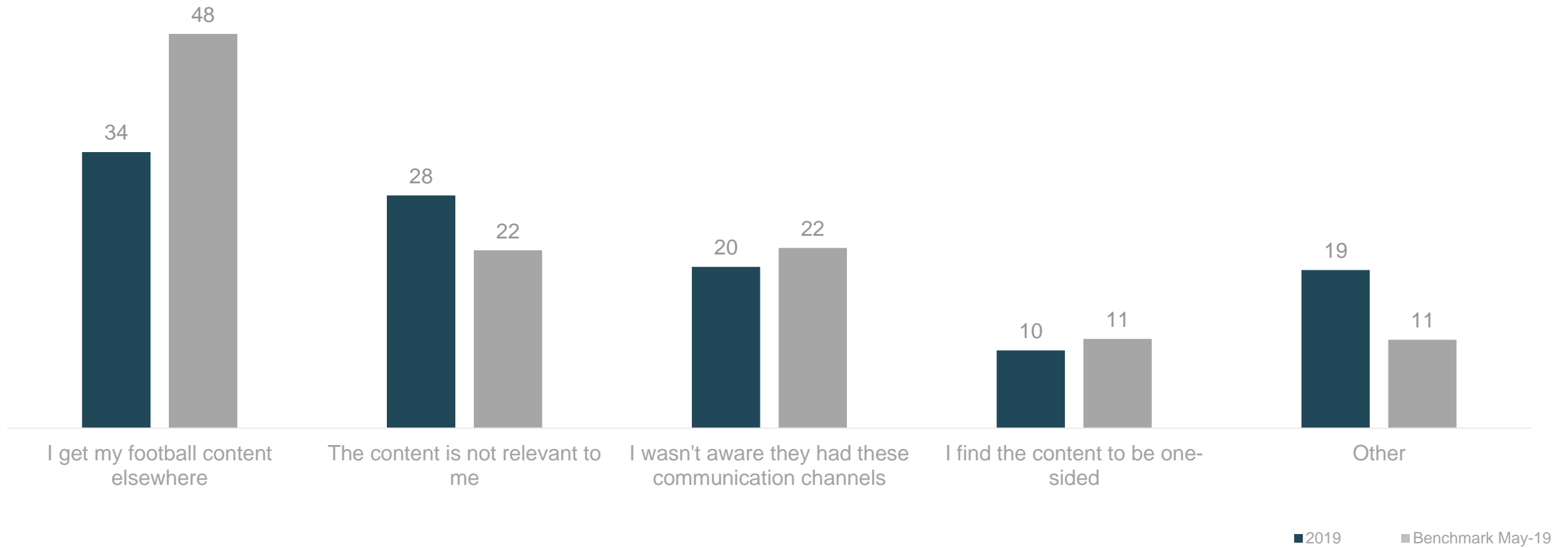
Time looking for content (%)



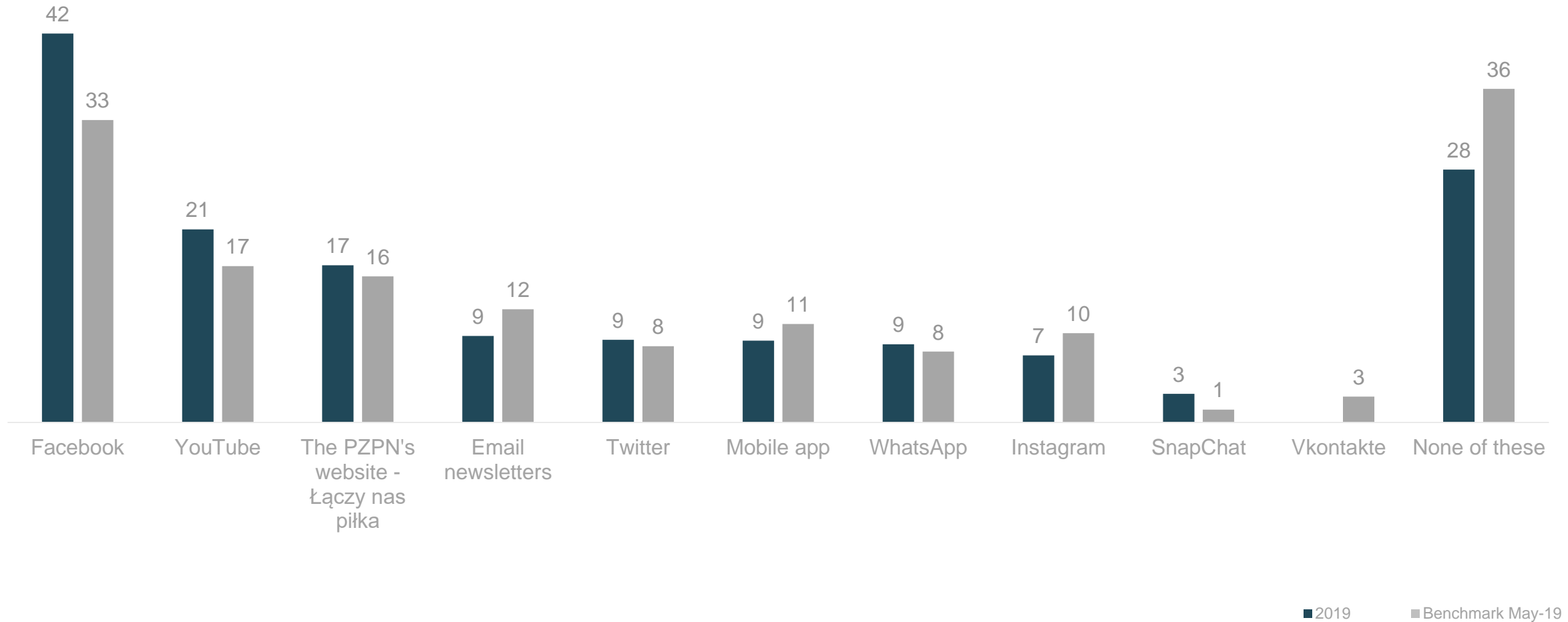
Preferred way of looking for content (%)



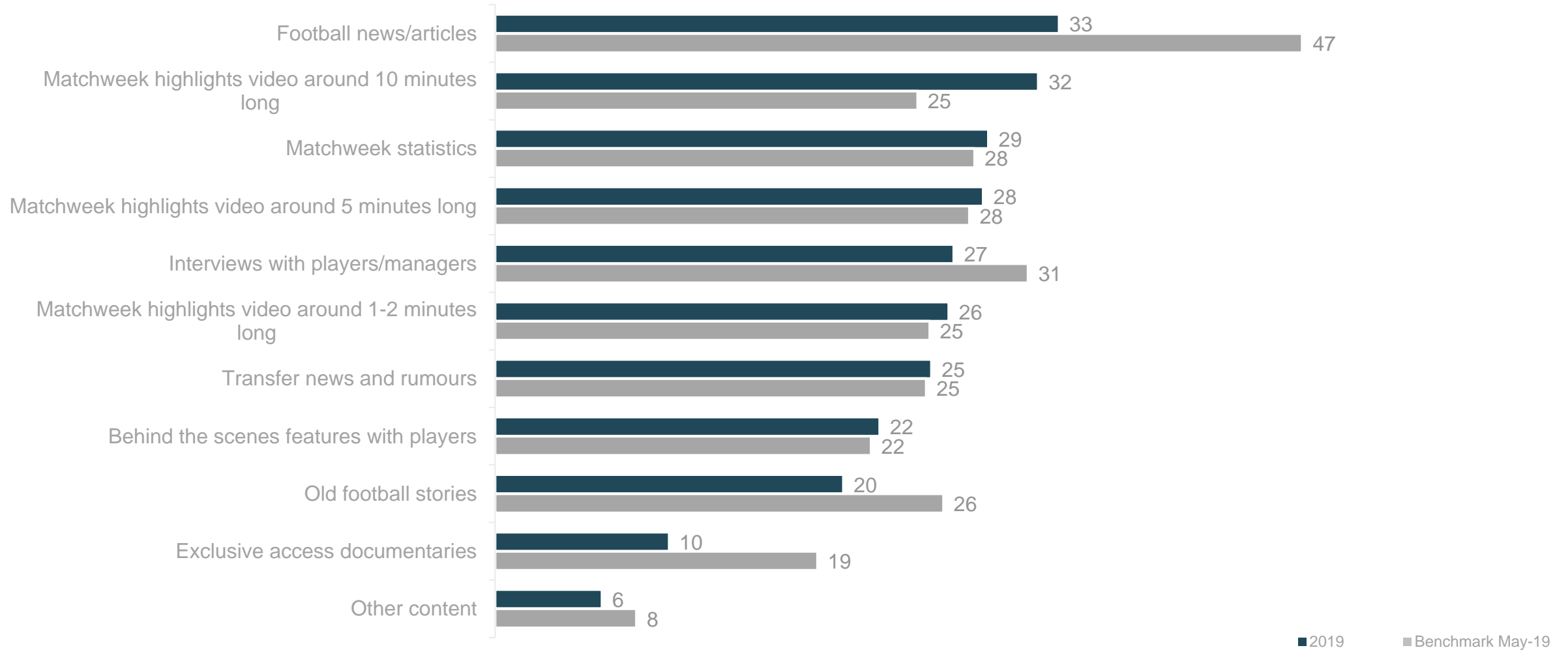
Reasons for not using the National Association's communications channels (%)



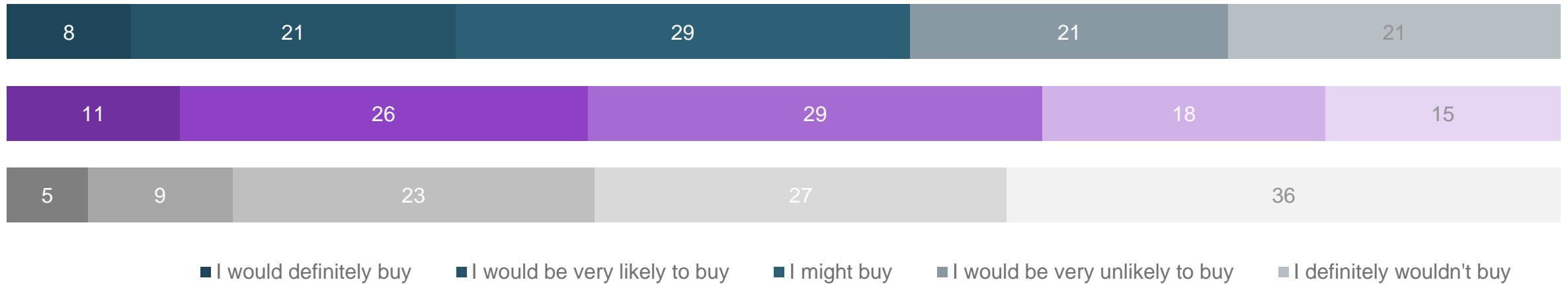
Preferred communication channels to receive news from the National Association (%)



Preferred digital sports content among football fans (%)

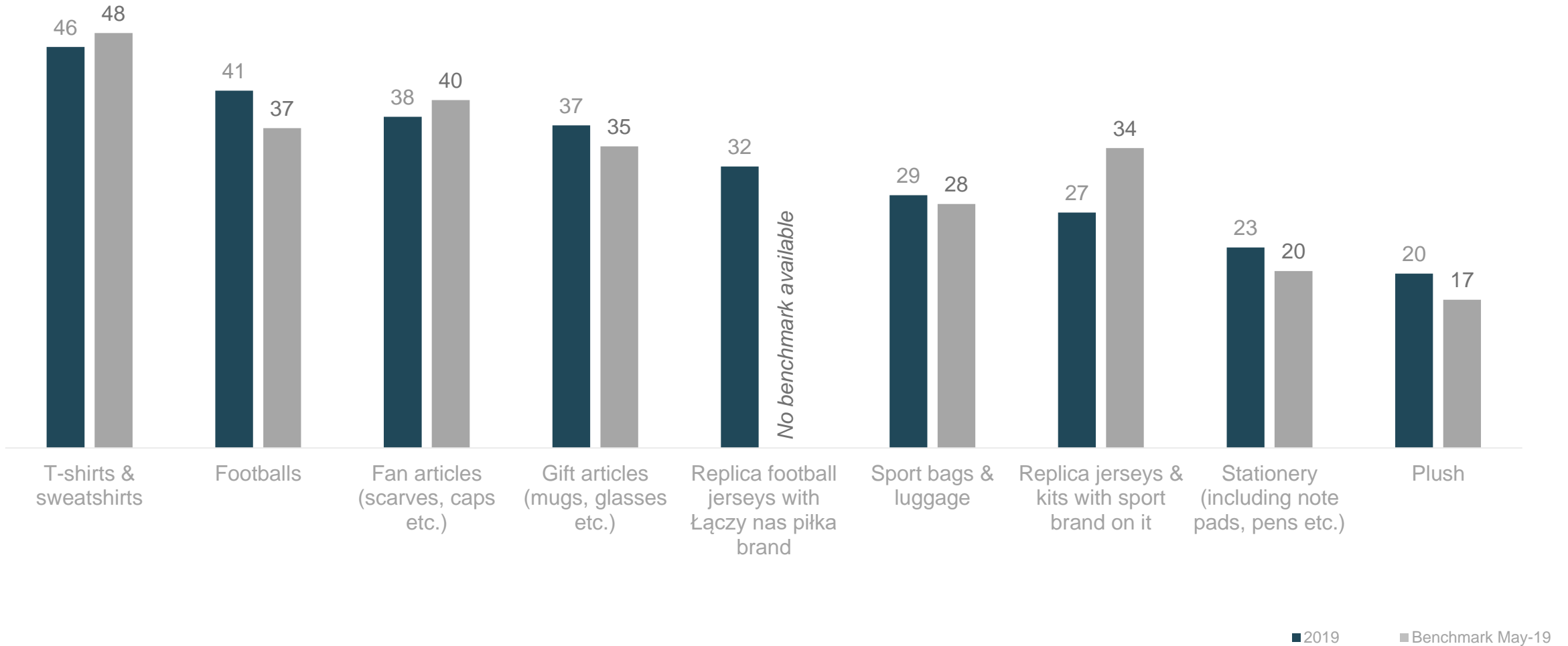


Likelihood of purchasing official licensed products of the National Association (%)

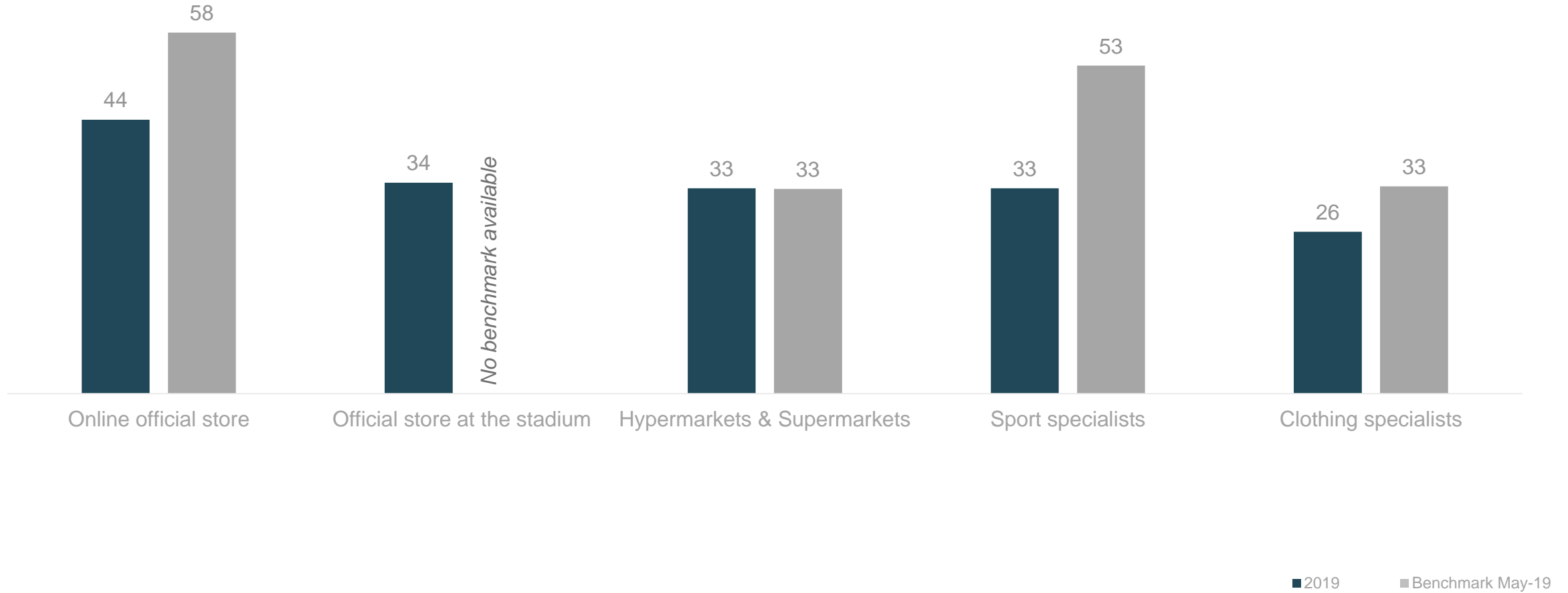


■ 2019 ■ 18-34 ■ Benchmark May-19

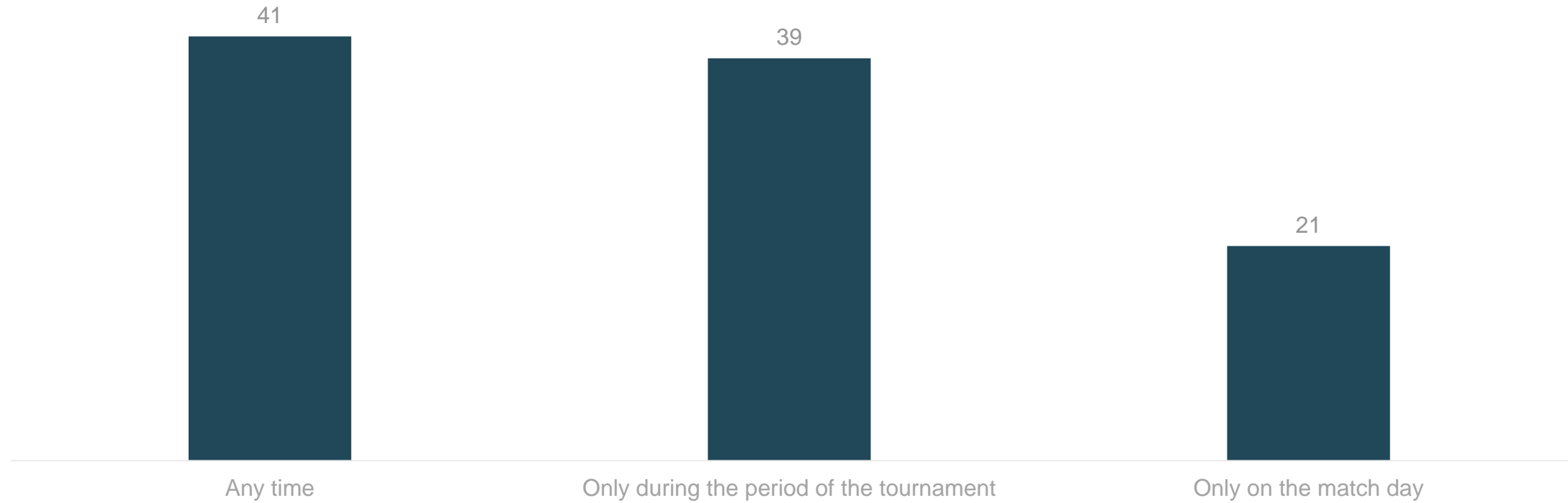
Official Licensed Products (%)



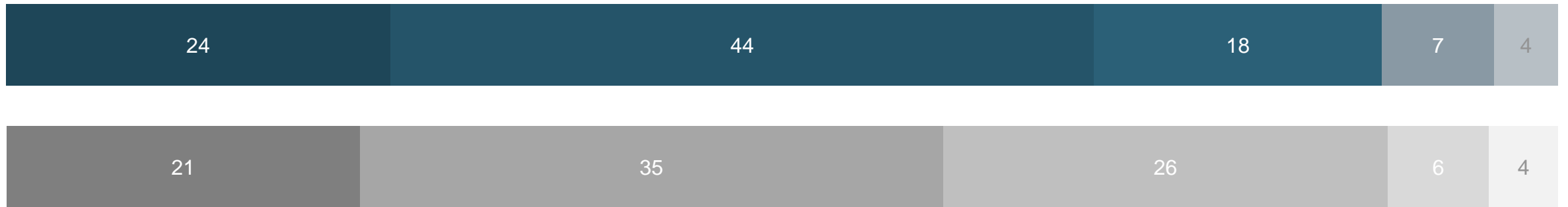
Place of purchase (%)



Time of purchase (%)



Logo positivity (%)



■ I like it a lot

■ 4

■ I neither like it nor dislike it

■ 2

■ I don't like it at all

■ 2019

■ Benchmark May-19

What does The PZPN need to do to improve its logo?

Its is not legible

It doesn't evoke associations with the ball

Does not represent the spirit of the nation

Quite complicated

Depreciation of the state emblem

Eagle should be more prominent

Communications – Key takeouts and potential actions



PZPN channels: Łączy nas piłka's website, Facebook and YouTube are particularly popular, all of which score above the European benchmark, sources of news for football fans. Two third (63%) of those consuming football online, use Facebook at least 3 time a week, which highlights the importance of this medium as a source of football news as well as news about the PZPN itself and its activities.



Although football news / articles (33%) are the most sought after pieces of digital sports content, they score much lower than the European benchmark (47%). There's a particular appetite for video highlights up to 10min (32%) compared to the European benchmark.



With its heavy set of communication channels, the PZPN needs to emphasize its website, YouTube and especially Facebook, which is the preferred way for the fans to receive the news. Furthermore, Facebook's widespread usage, gives PZPN a chance to further promote its work and enhance the reputation.

Appendix

Imagery of domestic competitions and national teams – adult population (%)

	Domestic League	Domestic Cup	Domestic Women's League	Men's team	Women's team	Youth team
Exciting	20	17	16	28	13	16
Boring	21	21	19	13	15	13
Prestigious	16	12	10	18	9	12
Competitive	33	33	24	29	23	28
Great atmosphere	13	14	12	27	11	13
Pride	9	8	10	27	14	15
Accessible	17	18	13	17	13	13
Modern & Up-To-Date	12	10	17	13	18	14
Family Friendly	9	11	16	15	15	14
Progressive	12	9	19	13	19	17
Entertaining	17	17	19	18	15	15
Unique	7	7	18	8	18	8
Successful	12	12	11	20	12	16
Affordable	9	9	11	5	12	11
Predictable	11	12	9	13	11	9

F4: Which of these words or phrases describe the following competitions?; F9 : Which of these words or phrases describe the following teams?

Base: Aware of: Domestic League (868), Domestic Cup (792), Domestic Women's League (603)

Respondents aware of: Men's national team (887), Women's national team (513), Youth national teams (628)

Imagery of domestic competitions and national teams – football fans (%)

	Domestic League	Domestic Cup	Domestic Women's League	Men's team	Women's team	Youth team
Exciting	23	20	16	33	13	16
Boring	18	18	18	7	14	12
Prestigious	16	13	10	21	9	12
Competitive	35	34	25	33	24	30
Great atmosphere	14	15	13	32	11	12
Pride	10	8	11	32	15	15
Accessible	19	18	13	17	13	13
Modern & Up-To-Date	14	10	17	15	18	15
Family Friendly	10	13	17	17	16	14
Progressive	13	10	19	14	20	18
Entertaining	19	18	21	20	15	15
Unique	8	8	20	10	19	8
Successful	14	13	11	22	12	16
Affordable	10	9	12	5	12	11
Predictable	12	12	9	9	12	9

F4: Which of these words or phrases describe the following competitions?; F9 : Which of these words or phrases describe the following teams?

Base: Football Fans aware of: Domestic League (662), Domestic Cup (615), Domestic Women's League (479)

Football Fans aware of: Men's national team (671), Women's national team (421), Youth national teams (519)

Notes on methodology

- The fieldwork was conducted using CAWI methodology
 - The same questionnaire script as used in all UEFA GROW projects was used
- Fieldwork and translation was carried out by Lightspeed
- All interviews were conducted in Polish
- Based on the quota requirements of the study, Lightspeed create a Sample Plan. This is used to identify those on the panel which match relevant criteria e.g. age, gender, region
 - Lightspeed aim to target as closely as possible in order to maximise sample
 - Quotas are reviewed on a daily basis and additional sample/reminders are sent out
 - If quotas are relaxed we will often re-invite those who had previously screened out
- Quality assurance
 - All links are checked by our QA team
 - We run soft launch data checks upon completion of c.10%
 - Final data checks are also carried out when fieldwork closes
 - We also check for non-sense verbatims and speedsters, any respondent entering non-sense responses i.e. ddfghldfkgld, is removed from the data
- The average length of interviews was 20 minutes
- Fieldwork period: 12th June – 18th June

Quality at all stages

As a sizeable global network, consistency and quality in execution and delivery is core to our value proposition. We use a common software and data collection platform for analysis around the globe, this ensures consistent and high quality data collection.

Practice and methodology experts work in consultation with the researchers and operations experts. The aim is to maximise consistency and quality of protocols and practices across countries, whilst reflecting local conditions. Liaison with local countries during the design, costing and set-up phase is handled through our multi-country project team. Within these hubs there are project managers and client service teams.

To ensure data accuracy we focus on checking and traceability throughout the process from collection through to analysis and delivery. This includes using back checks during fieldwork, internally developed systems such as WebEdit and Data Validation Portal to check data quality for multi-country projects, and the use of dedicated quality checking departments, independent of the core project team, to check scripts, analysis, topline, raw data and reporting outputs.

We firmly believe that methodology and quality is not a hygiene factor. It creates the foundation upon which great insights are built and correct business decisions made. Despite what others might claim, high-quality data-gathering is not easily outsourced, particularly on a global scale. Owning our own end-to-end operational capability gives us absolute control over quality. This is core to our philosophy and means that you can have 100% confidence in the robustness of the data.

As part of our commitment to quality and information security, we adhere to the following standards and industry requirements:

- MRS and ESOMAR professional codes of conduct
- ISO 20252: international market research quality standard
- ISO 9001: international standard for quality management systems
- ISO 27001: international standard for data security
- The UK Data Protection Act 1998
- GDPR Ready
- Cyber Essentials

