

8th September 2015

Walking Football Research

Presented by
2CV



Contents

1. Objectives and Methodology
2. Who is currently playing Walking Football?
3. How and why are they playing?
4. Who is not currently playing and why?
5. How should The FA move forward with Walking Football?



Objectives

Research was required so that The FA can understand how to take Walking Football forward and identify areas that need support for those facilitating the game.

Research Objectives:

- Understand who is playing Walking Football, how the sessions are run and reasons for playing
- Understand how current Players first heard about Walking Football and the levels of awareness and understanding among Non-players
- What would help current Players to continue playing and encourage others to participate?
- Is it for fun or competitive? Is there a desire for more competition?
- Anything at the sessions that they'd like to change?

Methodology and Sample

The first phase of research was conducted by the Customer Insight team at The FA and involved some **exploratory qualitative** research via 2 telephone interviewers with organisers from The FA and Walking Football sessions were also attended where Players were interviewed



The second phase of research was **quantitative**:

Methodology: 10 minute online questionnaire

Sample: N= 796

- *n=399 Walking Football Players (via The FA database)*
- *n=397 Non Walking Football Players who have some interest in Football and do at least one other activity (via a re-contact through the participation tracker panel)*

Age and gender quotas set for Non-players:

50-57: 46% 58-65: 54%, Males: 64%, Females 36%.

Fieldwork: 10th August – 25th August 2015



Who is currently playing Walking Football?



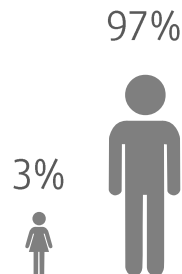
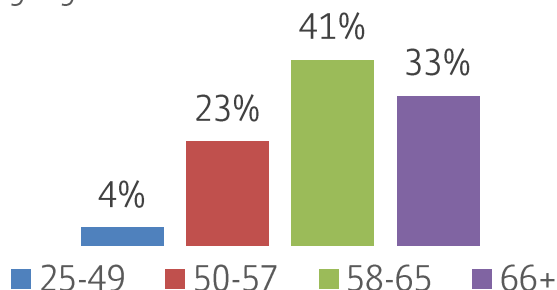
Most Walking Football Players are in their 60s and consider themselves more fit and healthy than Non-players



Profile | Players

Age and Gender

Avg. age: 61



Working Status

Retired:
Vs. 30% for Non-players



Working Full Time:
Vs. 39% for Non-players



Health & Fitness



73%

T2B Very/Quite Healthy
Vs. 61% for Non-players

51%

T2B Very/Quite Fit
Vs. 42% for Non-players

81%
Have at least 1
health issue*
(vs 73% for Non-
players)

Top 5 activities nowadays

68%
Walking



26%
Golf



26%
Swimming

25%
Cycling



22%
Gym



Walking Football has successfully attracted the target of 50-65's (and older), along with those who have a few health issues. Positively, they feel fit & healthy

*e.g. painful joints, high bloodpressure, muscular pain). Base: Walking Football Players (399)
SQ1: Age, SQ2: Gender SQ5b. Activities taken part nowadays, C6. Level of health. C5. Level of fitness. C8s. Working Status

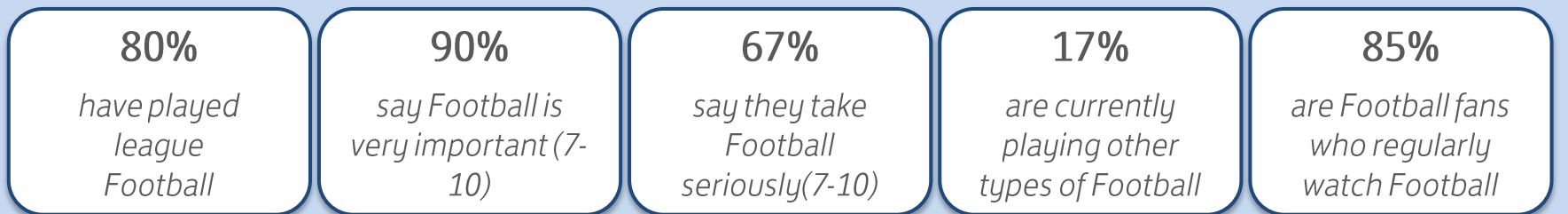
Walking Football Players have a strong relationship with the sport, the majority played Football when they were children



Football journey | Players



Walking Football Players are very engaged with Football as a sport:



Walking Football potential is highest among previous players – the length of time out of the game does not prevent uptake



How & why are they playing Walking Football

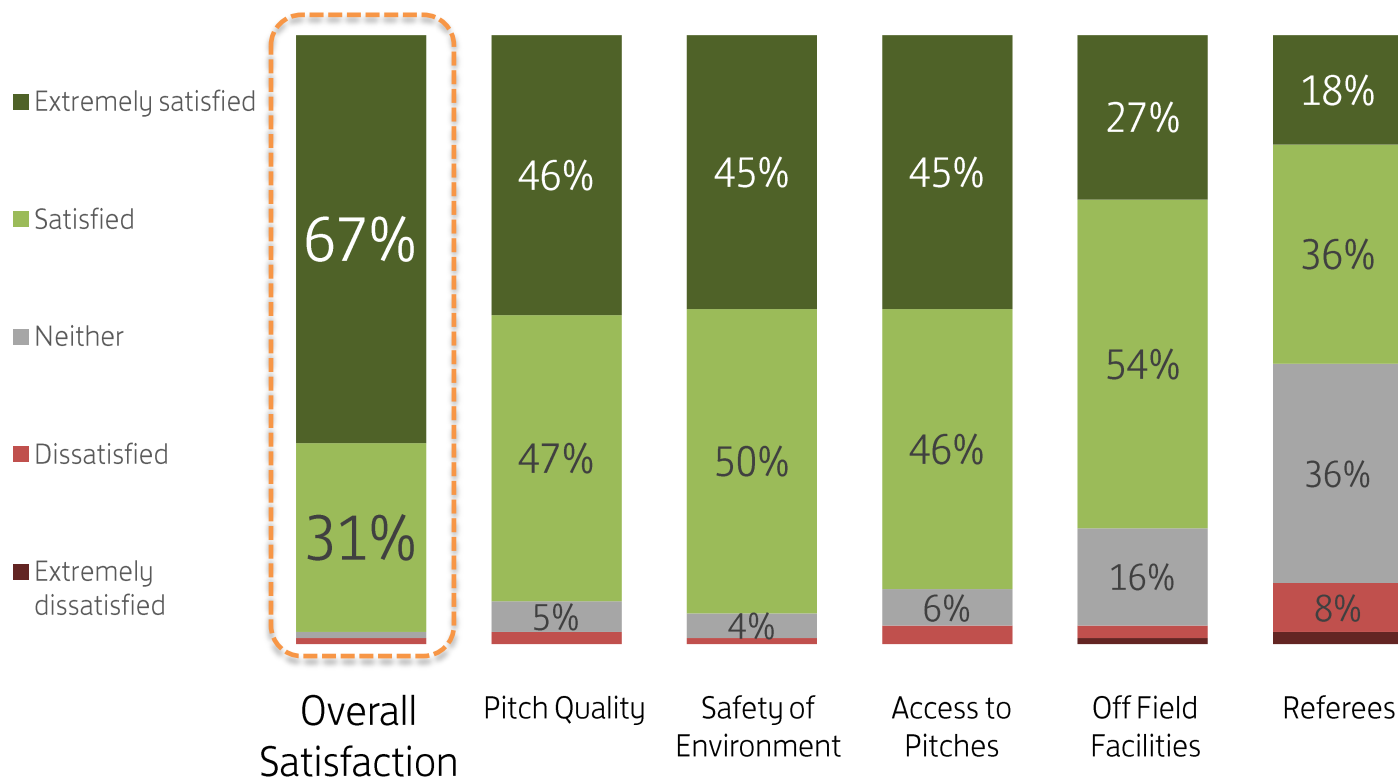


Players love playing; overall satisfaction of Walking Football is very high, with over two thirds extremely satisfied (top box)



Walking Football satisfaction | Players

Satisfaction of Walking Football Sessions



“Inconsistency of referees judging running.”

“Refereeing is inconsistent with what is deemed walking and what is running. One referee even said it was ok to run when you did not have the ball. Astonishing!”

A clearer, more consistent rule structure would be beneficial, due to ambiguity around refereeing, running causing some dissatisfaction with match officials

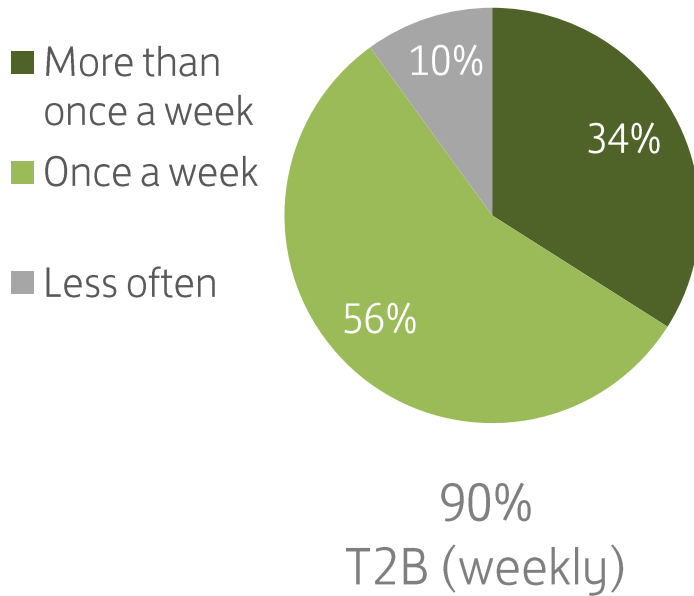


The majority of Players play at least once a week, with weekday late morning and evenings the most common time

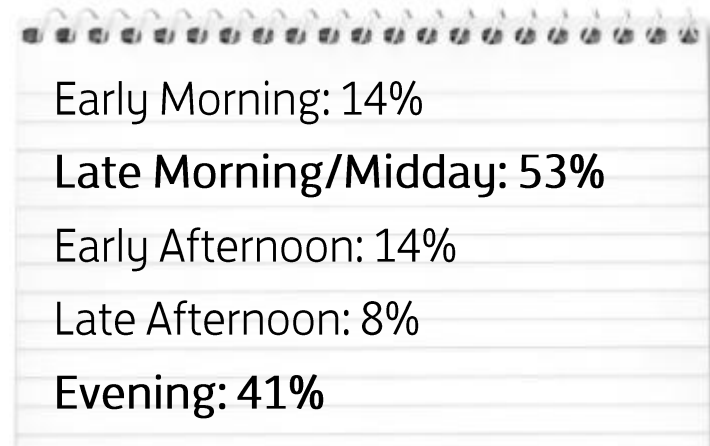
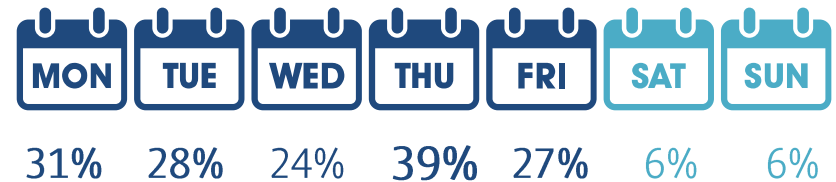


Walking Football current behaviour (how often and when) | Players

How often?



When?



Both mid-morning and evening sessions are key but late morning would only be possible for retirees; evening sessions are key for growth among non retired players

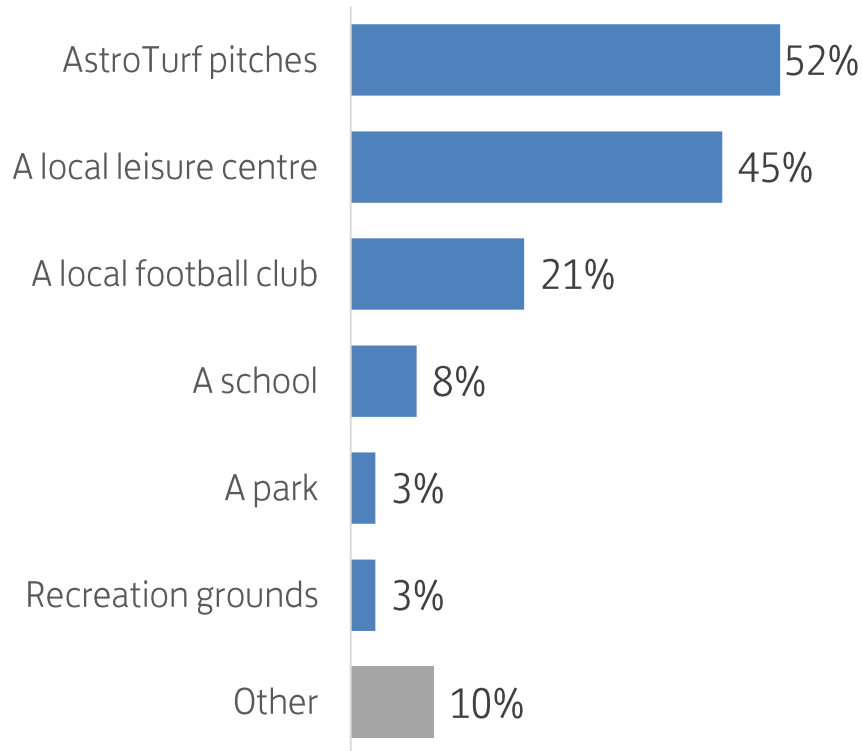


Sessions most typically take place on artificial pitches and The FA is stated as the most common organiser



Walking Football session location and the organiser | Players

Location



Organisers



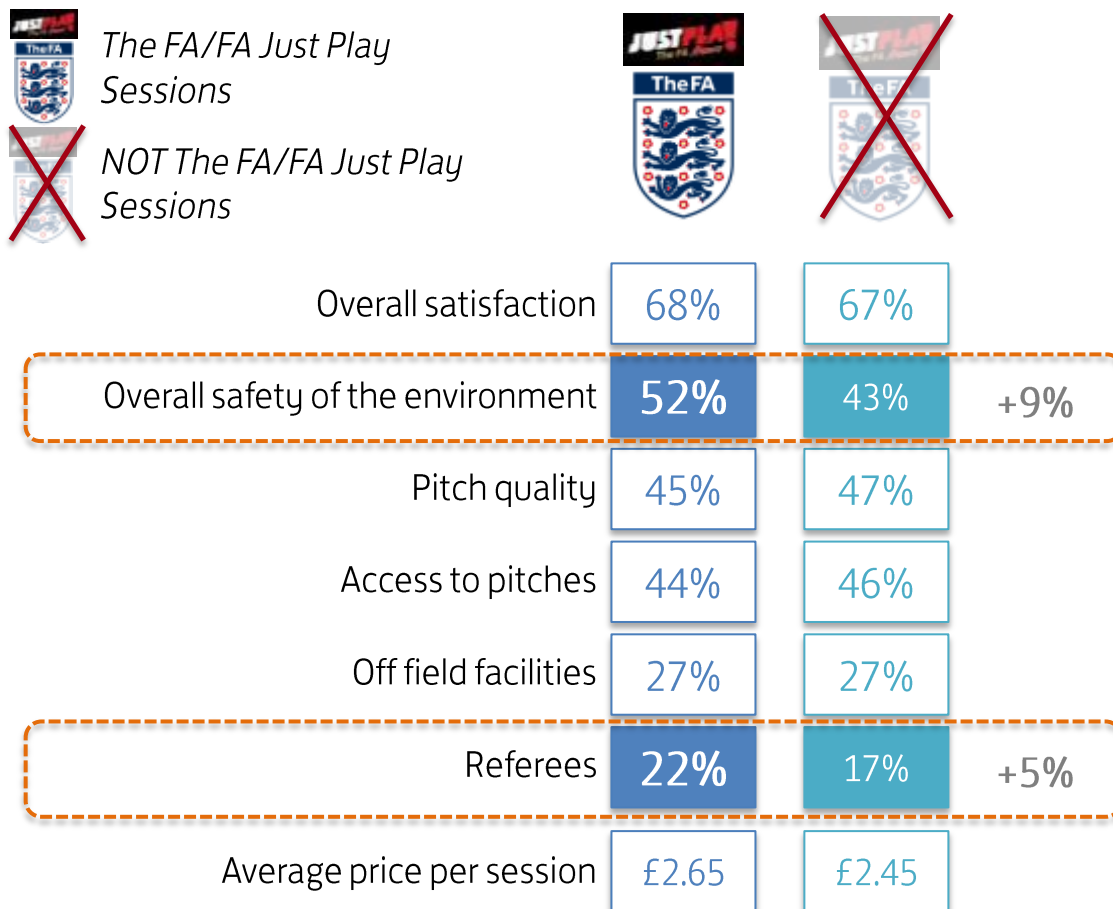
Positive that The FA are the largest organiser, but there are a number being organised by others; this presents a consistency issue



Satisfaction is lower for safety and referees among Players who attend sessions not run by The FA/Just Play



Top Box satisfaction ('Extremely satisfied') among FA run sessions vs. non FA run sessions | Players



Perceptions of The FA Walking Football organisers*:

There is a need to ensure that:

- *Basic first aid qualifications are held*
- *Best practices are adhered to (importance of the warm up, cool down etc.)**

Challenge for The FA is the lack of control over non Just Play sessions; there is a need to upskill and educate those running these sessions



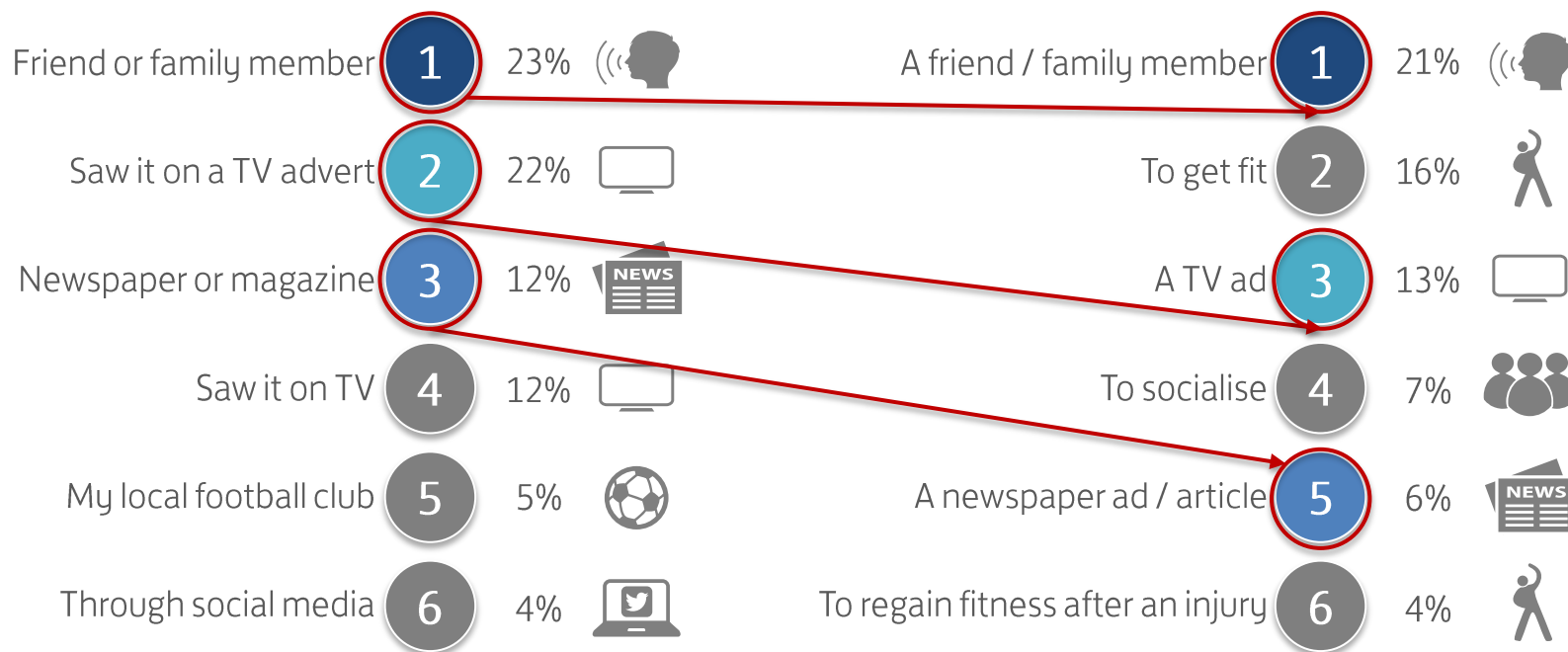
Word of mouth is the most common source of awareness and also the most important prompt to playing



Walking Football first source of awareness vs first prompt to play | Players

Source of first awareness of Walking Football

Prompt to first start playing Walking Football



Hypothesis that the Barclay's TV ad has been key in raising awareness of Walking Football is true



Health and fitness, socialising and being apart of the game they love are the main reasons Players want to take part



Walking Football reasons for playing (Top 10) | Players

	All reasons	Main reason (Top 3)
For health and fitness benefits	80%	23%
For camaraderie, socialising and banter	76%	13%
To be part of the game I love	73%	38%
To have fun	71%	13%
To be part of a team	58%	
To stay feeling young	38%	
Provides a sense of achievement	36%	
To bring back memories	32%	
To develop my skills	25%	
To help my confidence/wellbeing	19%	

Little difference by age

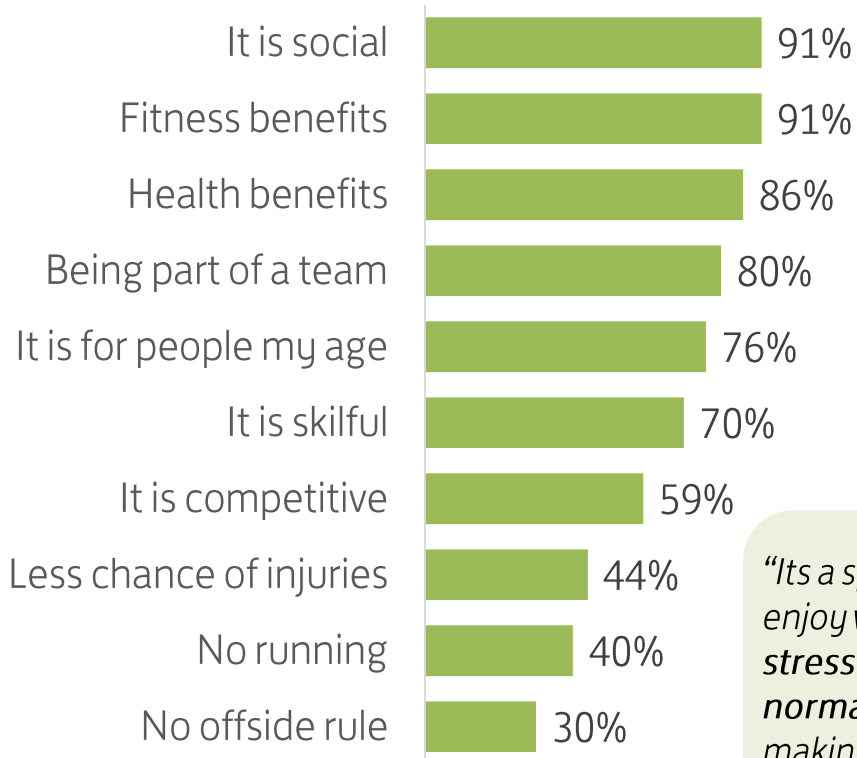
Focus on the fact it allows people to be part of Football again and the health, fitness and social benefits it gives – it is less about developing skills



Similarly, the social side of the sessions comes out as one of the key likes along with the positive impact on health and fitness



What is 'Liked' about Walking Football (Top 10) | Players



"Being able to get out and kick a football again... I also like meeting all the other guys and having a laugh and socialising."

"The exercise, the chance to play a competitive sport at 60, and the camaraderie."

*"The chance to **relive** my youth!"*

"Playing the game."

*"It's a sport that you can enjoy **without the stress and strain of normal football** and making **new friends**"*

"It is not very competitive" is bottom, with 11%, suggesting a desire for genuine competition

Communicate the social, fitness and health benefits of Walking Football



Most common theme of spontaneous dislikes are around inconsistent refereeing and rules from one club to the next



What is 'Disliked' about Walking Football (key themes from open ends) | Players

Inconsistent Rules

"Frustration at interpretation of rules and that they seem to differ depending where you play. Some Players persistence at running"

"A lack of uniformity with the rules throughout the country. I have played in around nine counties and various tournaments in my home county and not one has matched each other for rules"

"In competitive games rules appear to differ amongst different clubs. Also, running is a constant issue and refereeing of this rule is poor"

"Rules vary from centre to centre"

"The teams should be age related i.e. 50-65, 66-70, 71-80 which would make the games more even and enjoyable"

"Mismatched ages in some sessions"

Disparity In Ability / Age

There is a desire for The FA to codify a set of rules that ensures teams across the country are playing the same game

"Over competitiveness of odd individual"

Too Serious / Competitive

"Over competitive teams who have forgotten what it is all about"

"People who take it too seriously. We are not all the same age or have the same abilities."

"I found it difficult to find an EVENING session, most sessions are daytime, I'm still working daytimes..."

"I wish there was more venues in my immediate area so if I miss one night through work I have the opportunity to attend another"

"I cannot usually make Friday evenings therefore it is difficult to play every week with my friends"

Organisation / Availability

"The facility been taken away from you, to allow children to use it. When they can easily play outside on the grass"



Competition is the top desired element that would ensure they continue to play; followed by more friendlies and regular games



Triggers to continue playing (Top 10) | Players

	All Triggers	Main Trigger (Top 3)	
More organised competition	31%	16%	Higher among <57's
More friendly games	30%		
More regular games	25%	8%	
More players at the session	19%	9%	
Social events	17%		
Sessions/teams with lower age limits	17%		
A club near where I live	15%		
Better quality pitches / facilities	13%		
Sessions at a more convenient time of day	11%		
Separate skills training session	9%		

■ =higher for less regular Players* (vs. regular Players)

They have a desire for more regular games and more convenient clubs

Opportunity for The FA to offer more organised competition; if The FA don't do this, the perception is that someone else will



Summary | Players



- Most Walking Football players are in their 60's (av. 61), are retired (50%) and have previous experience with Football
- Players love it! **Satisfaction with Walking Football is very high**, with over 2 thirds saying they are extremely satisfied with the sessions overall (67%)
- Sessions are typically played Mon-Fri; evening (41%) and late morning/midday (53%)
- Their top main reason for playing is '**to be part of the game I love**' (38%). They also value the **health benefits (23%)** and **social side of the game (13%)**.
- One area where there is an opportunity to build satisfaction is around the **refereeing of the sport and consistency of rules**. Some Players feel that, in particular, running is not always properly policed and that rules **differ from club and competition hosts**
- **More organised competition (31%), more friendly games (30%)** and **more regular games (25%)** are the key things that Players would like more of
- Among Players who don't play as regularly (less than once a week) their desires skew towards **more regular games, a club near where they live and convenient sessions** times, suggesting the real barrier to regular play is **availability rather than any dissatisfaction or apathy**



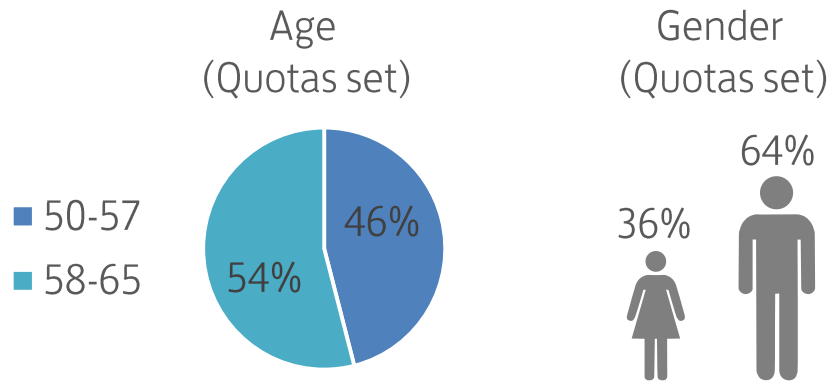
Who is not currently playing Walking Football and why?



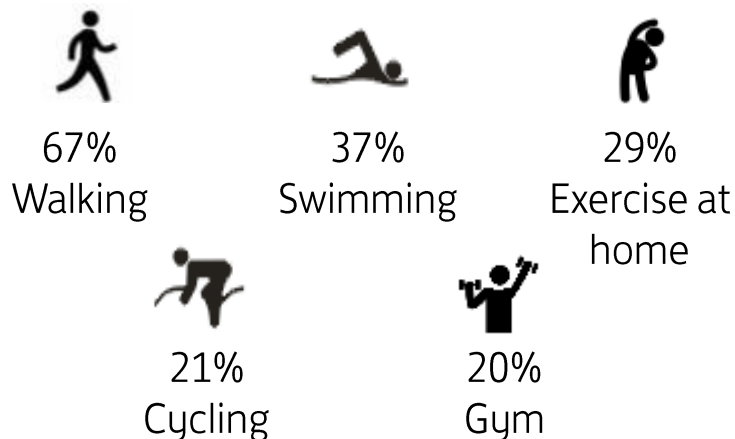
As a reminder...our Non-player sample were defined as 50-65, interested in Football as a fan and active (at least one activity)



Sample definition and profile | Non-players



Must take part in at least one of the activities nowadays* (top 5 below)



Must have some interest as a fan
(No quotas: natural fall out)

- A football fan and regularly attend matches (33%)
- A football fan. I tend to watch on TV, occasionally attend matches (52%)
- Loosely follow a team but I don't attend matches (11%)
- Don't support a football team but get more interested around major tournaments (4%)
- I have no interest in football at all (0% - screened out)

47%

Lapsed Football Players
(No quotas: natural fall out)



*List of 22

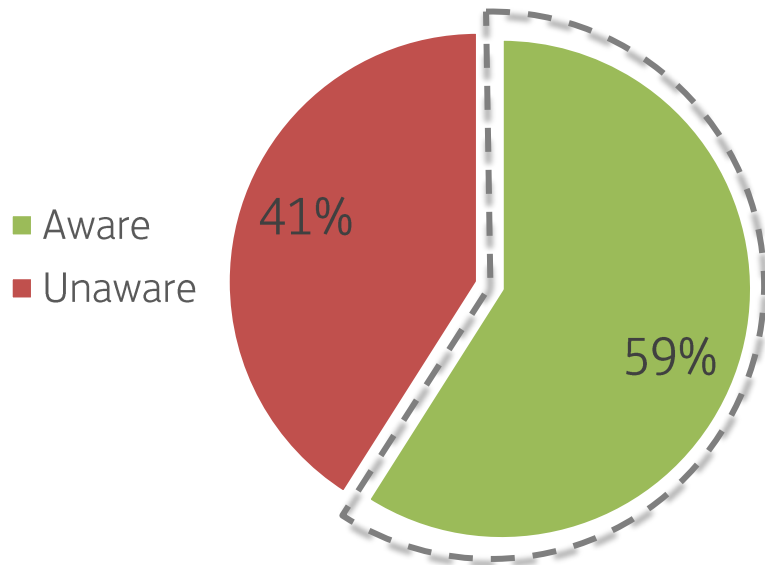
Base: Non-players (397). SQ1. Age, SQ2. Gender, SQ4a/SQ4c. Ever played Football/play nowadays SQ4aa/SQ4c. SQ5b. Activities taken part in nowadays

3 in 5 have heard of Walking Football, though of those, just a quarter have a very good understanding on what it is

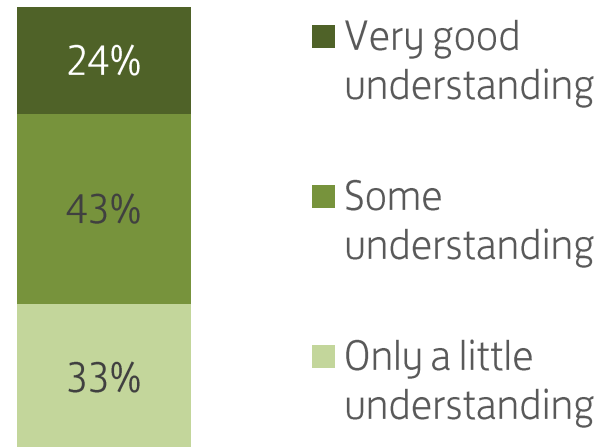


Awareness and understanding of Walking Football | Non-players

Awareness of Walking Football



Understanding of Walking Football
(among those aware)



Awareness Skews...

Similar across age groups. Males more aware (70%). Ever played football more aware (70%).

Understanding Skews...

Similar across age groups and football players. Females have lower understanding (18% top box).

Challenge for Non-players is to improve awareness and understanding; show people what it is to explain how it works and how it's played

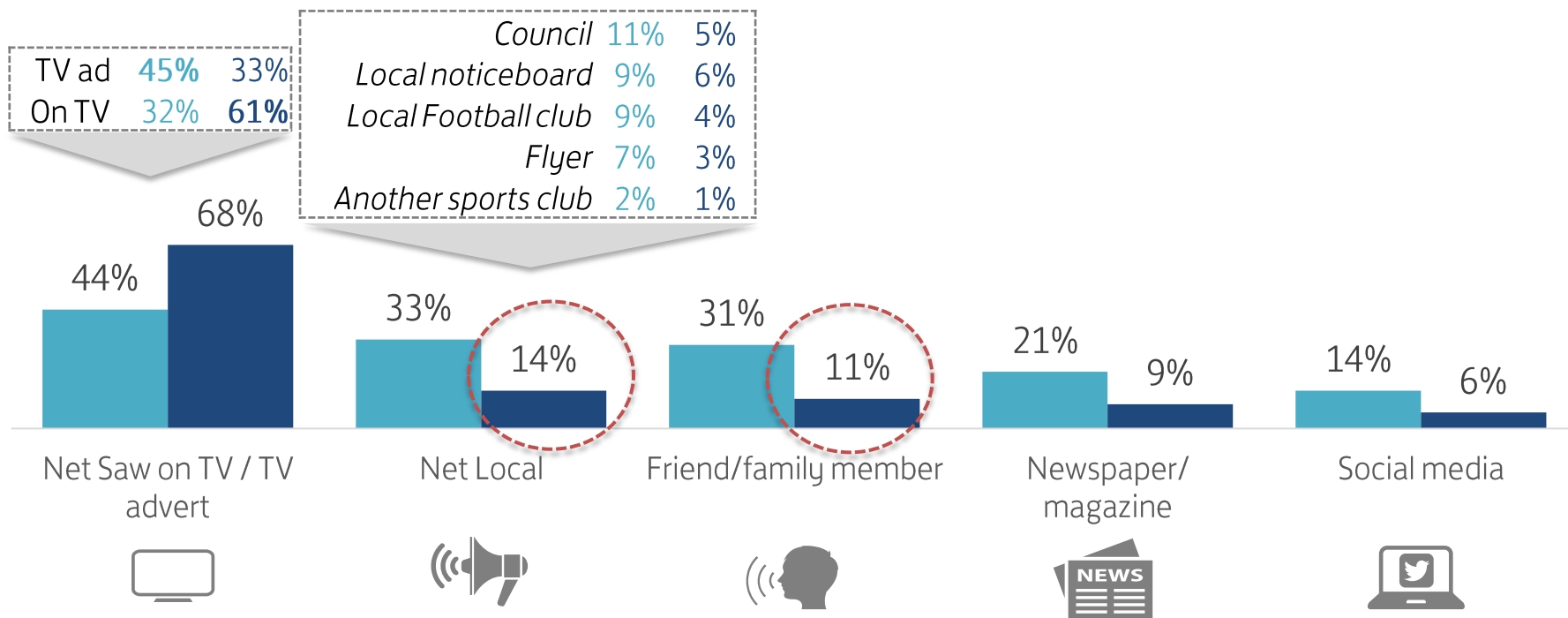


Non-players claim to have heard about Walking Football on TV but WOM and Local channels are much lower than for Players



All sources of awareness (first and others) | Non-players (who are aware) and Players

■ Players ■ Non-Players



Non-players are not currently hearing about it from their friends so the job is down to The FA to get the message out there; focus on local channels



Base: Non-Players aware of WF (236), Players (399).

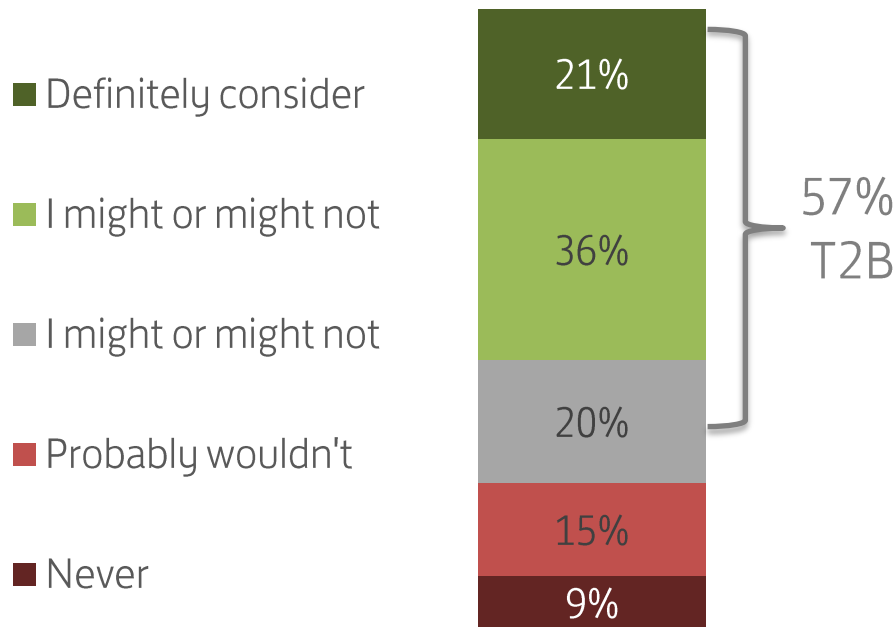
Q2a. How did you first hear about Walking Football? Q3. And did you hear about Walking Football anywhere else?

Over half would consider, especially males and those with some experience with football



Consideration of Walking Football | Non-players

Non Player Consideration of playing Walking Football*



*Non-Walking Football Players' consideration asked after exposure to a brief explanation of what Walking Football is.

T2B Consideration skews...

Similar across age groups
50-57 (56%), 58-65 (57%)

Higher among Males
Males (67%), Females (39%)

Higher among those who have experience with Football
Ever played (67%), Nowadays (77%)

Higher among those aware, though still half unaware who would consider
Aware (64%), Unaware (46%)

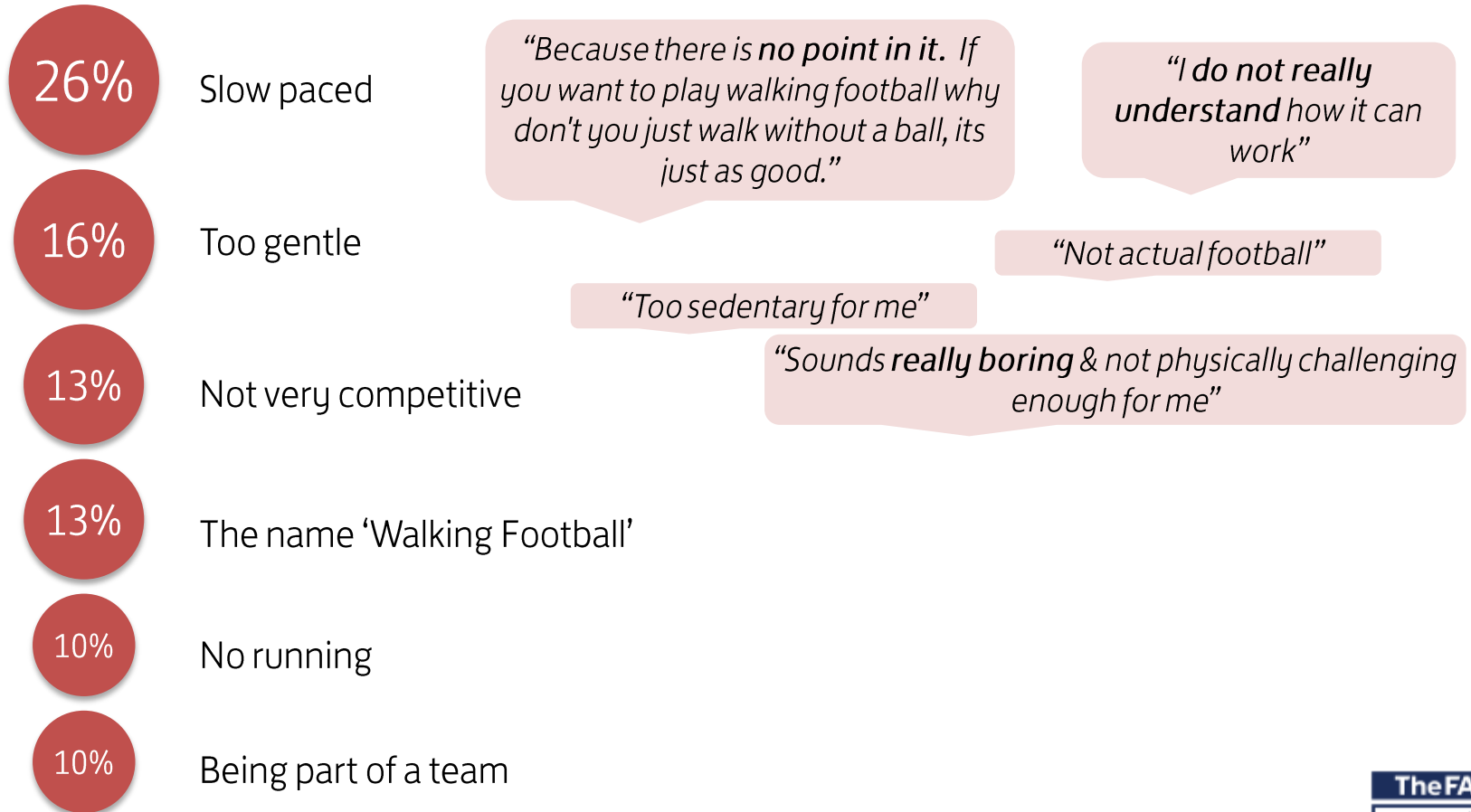
Building awareness and understanding should be the first step, as once aware, consideration is good. Half of those not aware until today would consider



Being slow paced and too gentle are cited as the top dislikes among those who would not consider Walking Football



What is 'Disliked' about Walking Football (Top 5) and spontaneous dislikes | Non-players who would not consider (B2B)



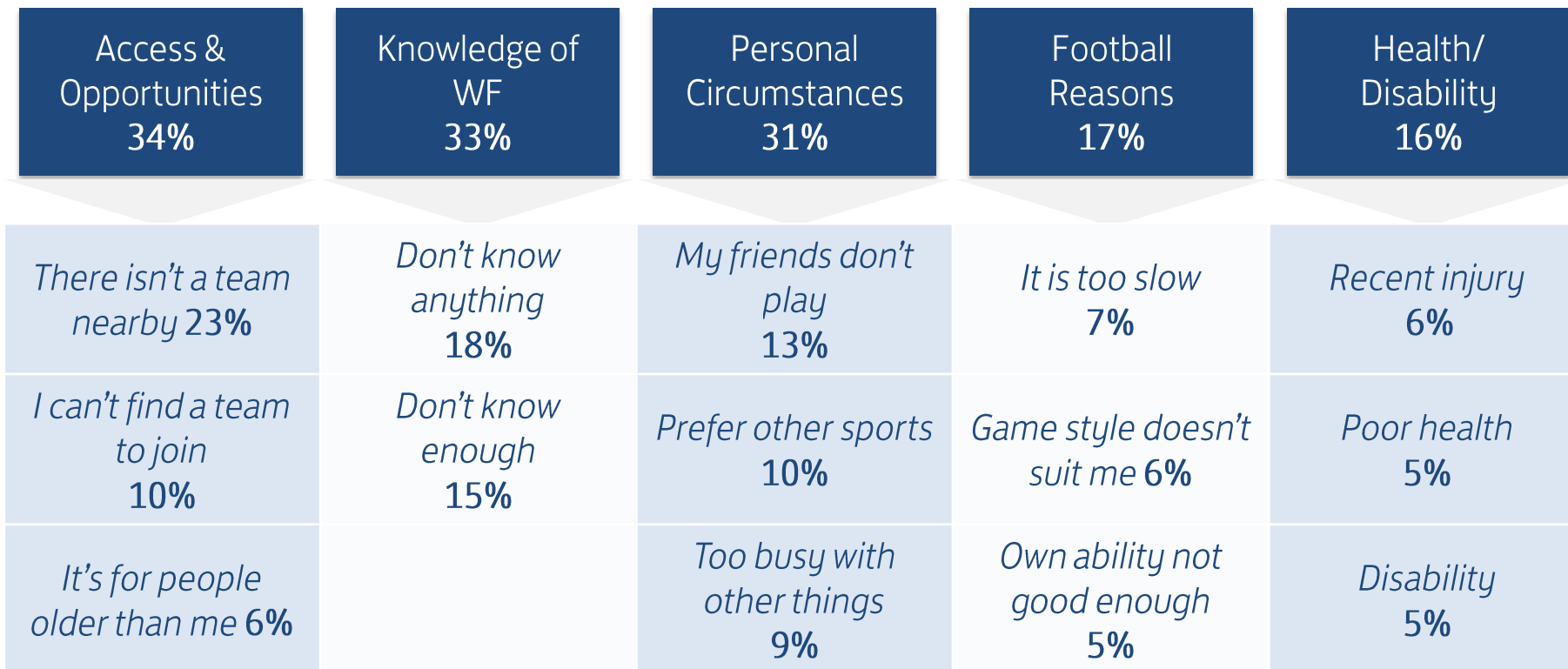
Further evidence that the focus should be on building understanding, particularly to mitigate concerns on being too slow paced; showing that it is still a good work out



Along with knowledge, main barriers include not being able to find a team/having one nearby or knowing anyone that plays



Barriers to playing Walking Football | Non-players



Important to build visibility of the game, how to access it and provide opportunities to play at a local level



Summary | Non-players



- Given the sport is fairly new, **awareness of Walking Football is of a relatively good** level among the target age group of 50-65's (59%)
- Saying this, there is **room to improve awareness further** and more importantly **increase understanding of the sport**; just a quarter of those aware have a 'very good' understanding of the game
- The Barclay's **TV ad did well for building awareness** but less so in encouraging play. Players have heard about Walking Football **via their friends** and through **local channels** much more compared to Non-players
('Friend/Family': Players: 33% vs. Non-Players: 11%. 'Net Local' Players: 33%, Non-players: 14%)
- Over **half (57%) would consider** playing Walking Football, which is even higher among **Males** and those that have **some experience with Football**
- Alongside **knowledge of the game**, the main barriers are claimed to be around **access and opportunity**; 'There isn't a team nearby' (23%), 'I can't find a team to join' (10%) and 'my friends don't play' (13%)
- 26% of those who would not consider, dislike the fact that it would be **'Too slow paced'**



How should The FA move forward with Walking Football?



Different drivers to playing for the two groups. Players want more games & competition; for Non-players it is about access



Top claimed drivers to continue playing / start playing | Players and Non-players

Players	
More organised competition	31%
More friendly games	30%
More regular games	25%
More Players at the session	19%
Social events	17%
Sessions with lower age limits	17%

Driven by <57's

Non-Players	
A club near where I live	44%
An introduction session	21%
Social events	11%
Sessions at a more convenient time of day	11%
Cheaper prices	11%
More women playing	11%



Driven by Females

Consider organising more competitive games and offer introduction sessions for new Players. Dial up the social aspect of the game as they are appealing to both groups

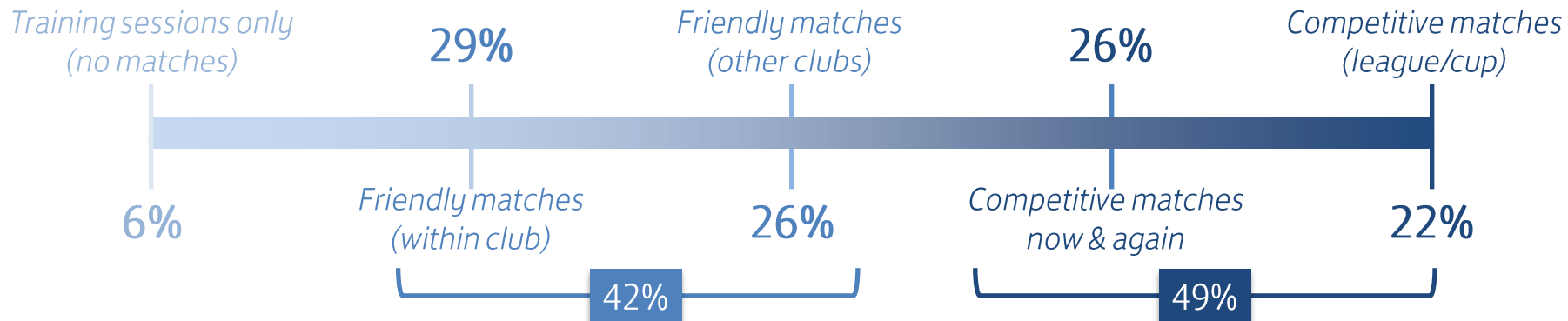


At the moment only about half of Walking Football Players play competitively and majority have a lower age limit

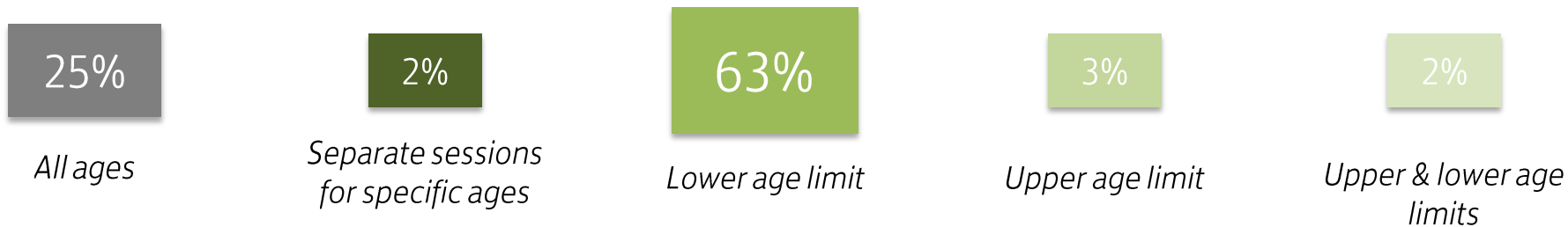


Session make up (competition and age) | Players

Highest level of competition



Age limits of sessions



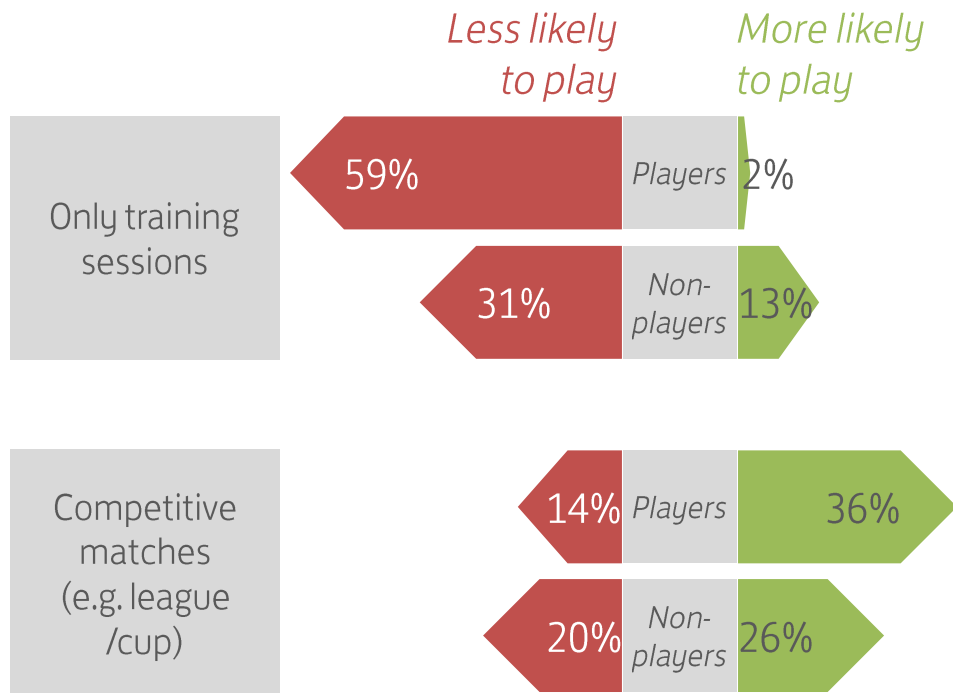
We need to understand how this compares to what is preferred...



Signs that not offering any competition (training only), will put off a lot of Players and also will not appeal to Non-players



Competitiveness wanted for teams/sessions | Players and Non-Players



Preferred competition	Players	Non-Players
Only training sessions	2%	7%
Net Friendly matches (within club/other clubs)	31%	44%
Net Competitive (now and again/in a league/cup)	66%	32%



'More competition' is higher for <57's

Introducing more competitive games (leagues/cups) seems a good route forward especially to engage the younger end of the target (50-57's)



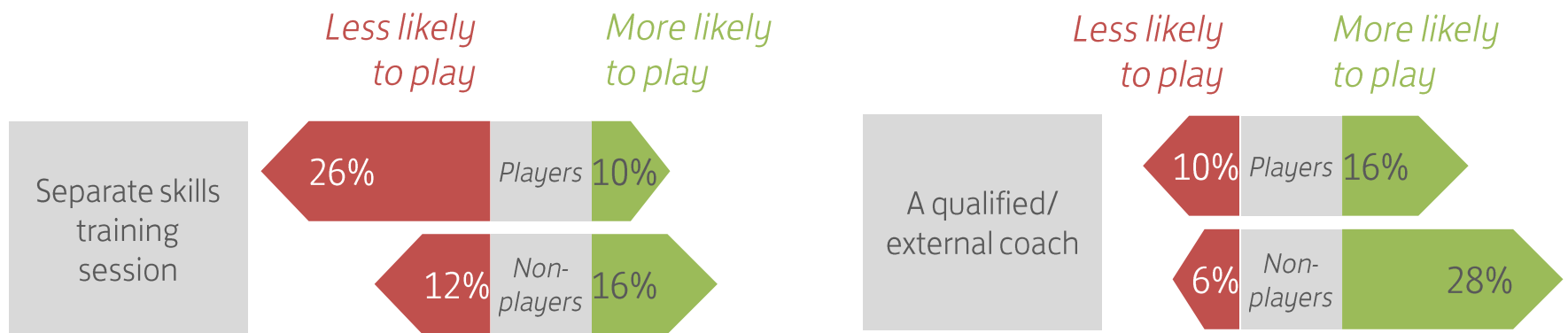
Base: Non-players (397), Players (399)

Q31. Would you be more / less likely to play Walking Football if there were the following? Q32. Which would be your preferred level of competition?

In line with wanting more competition and games, a separate skills session is not that desired by Players



Session type and coach wanted for sessions | Players and Non-Players



Offering qualified coaches could help increase participation; potentially giving more credibility to the sessions



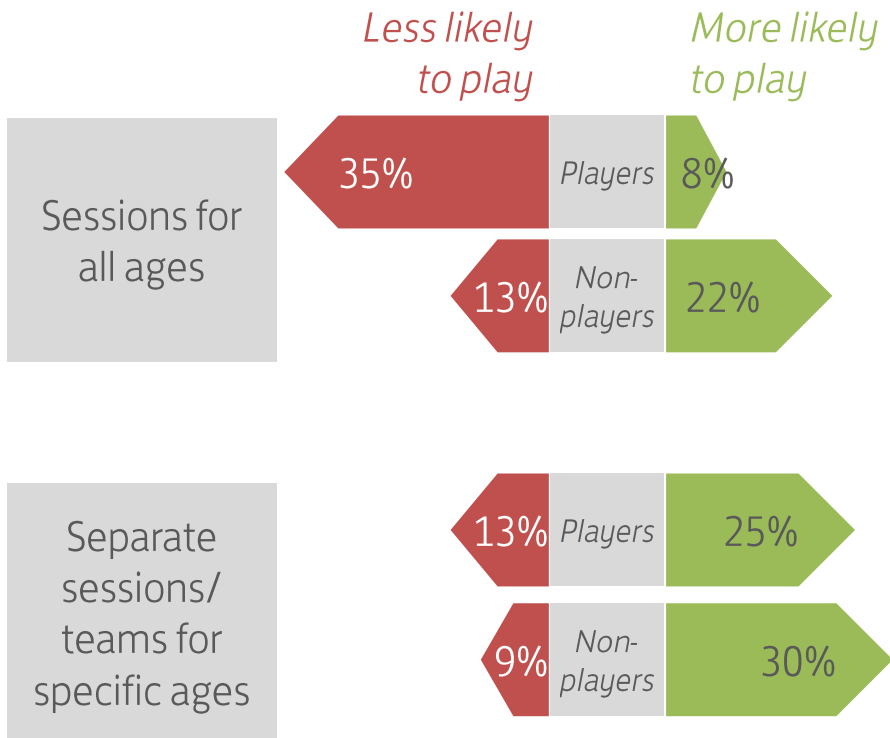
Base: Non-players (397), Players (399)

Q31. Would you be more / less likely to play Walking Football if there were the following? Q33. Which would be your preferred age groups?

Indications are that opening up Walking Football to all ages, could put off some Players – 2 in 5 prefer a lower age limit



Age groups for sessions/teams | Players and Non-Players



Preferred ages	Players	Non-Players
All ages	10%	23%
Separate teams for specific ages	26%	27%
Lower age limit only	38%	9%
Upper age limit only	5%	7%
There are upper and lower age limits	5%	8%
Don't mind	16%	26%

58+ prefer lower age limits

Though separate teams for specific ages is claimed to be appealing, this could be a challenge if turnout is low. Attitude & ability are potentially the more important factors



2CV thoughts...



- **Communicate what is loved** about the game; **health and fitness benefits** and that it is **very social** and that it is a great way to **get back into the game**
- Walking Football **potential is highest** among **previous Football Players**
- **Establishing more rules and consistency to the game** would be beneficial; as this is where there is some frustration at the moment and where satisfaction levels are lowest
- Alongside this, **more organised competition is also desired**. If The FA don't offer this, the perception is that someone else will
- Players want **more matches in general and more regular games; weekday evening sessions are key for growing the sport** (particularly non-retirees)
- **Increase awareness further**. The FA can't just rely on the Barclay's ad to drive awareness as without the WOM reinforcement, people don't fully understand what Walking Football is about. **Local channels** (e.g. the council, local football clubs) are key
- Improve understanding of the game by **showing and explaining how it works** and to help alleviate concerns that it is 'too slow paced'
- Important to convey to Non-players; **how they can access it**, where it's played and local teams available. Indications that an **introduction session** would be well received and a **qualified coach** would potentially add credibility



TheFA.com