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UEFA NATIONAL ASSOCIATION RESEARCH

FOOTBALL FEDERATION OF MACEDONIA



GROW



January 2021

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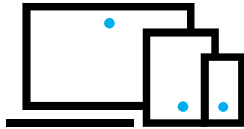
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RESEARCH SCOPE

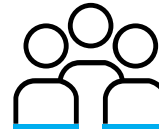
UEFA GROW RESEARCH PROGRAMME

METHOD



- The fieldwork was conducted using CATI methodology
- Fieldwork took place between 7th – 17th December 2020.
 - The 2016 wave was also completed via CATI methodology and took place between 21st – 31st October 2016
- The average length of interviews was 27 mins

SAMPLE GROUP



- 1015 nationally representative respondents per market
- Representative on age / gender & region within each market

SURVEY CONTENT



- The same questionnaire script as used in all UEFA Grow projects was used
- Questionnaire contents include
- Sports Interest / participation / barriers / (for men, women and children)
 - Competition interest and imagery
 - Football Following (including attendance)
 - Club and National Team following and perception
 - National Association image perception
 - Sports & Football media consumption
 - Country specific questions
 - COVID-19 section

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1. FOOTBALL INTEREST



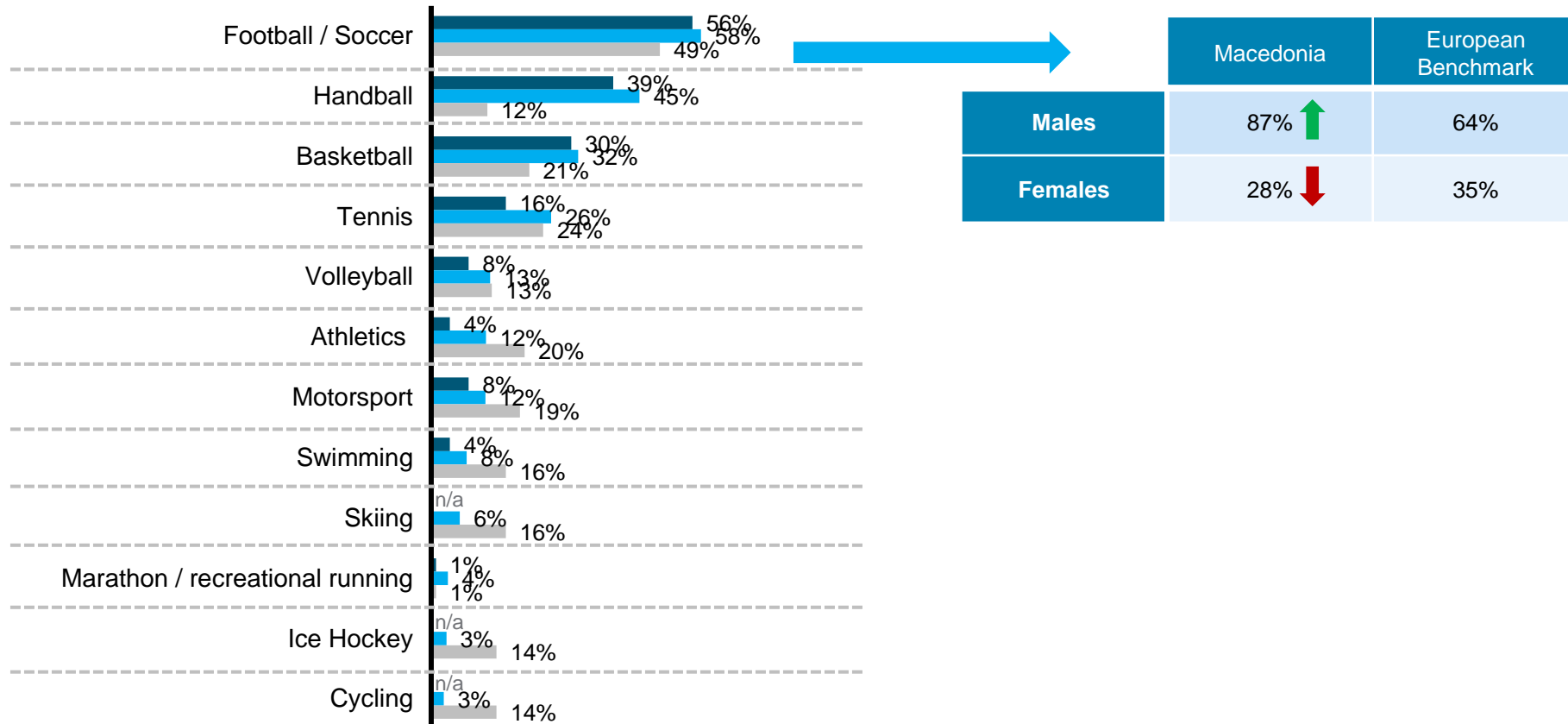
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SPORTS INTEREST

Football is by far the most popular sport in Macedonia with 58% of the general population showing an interest. Interest has increased slightly since 2016 (when it was 56%).

- Macedonia 2016
- Macedonia 2020
- European Benchmark



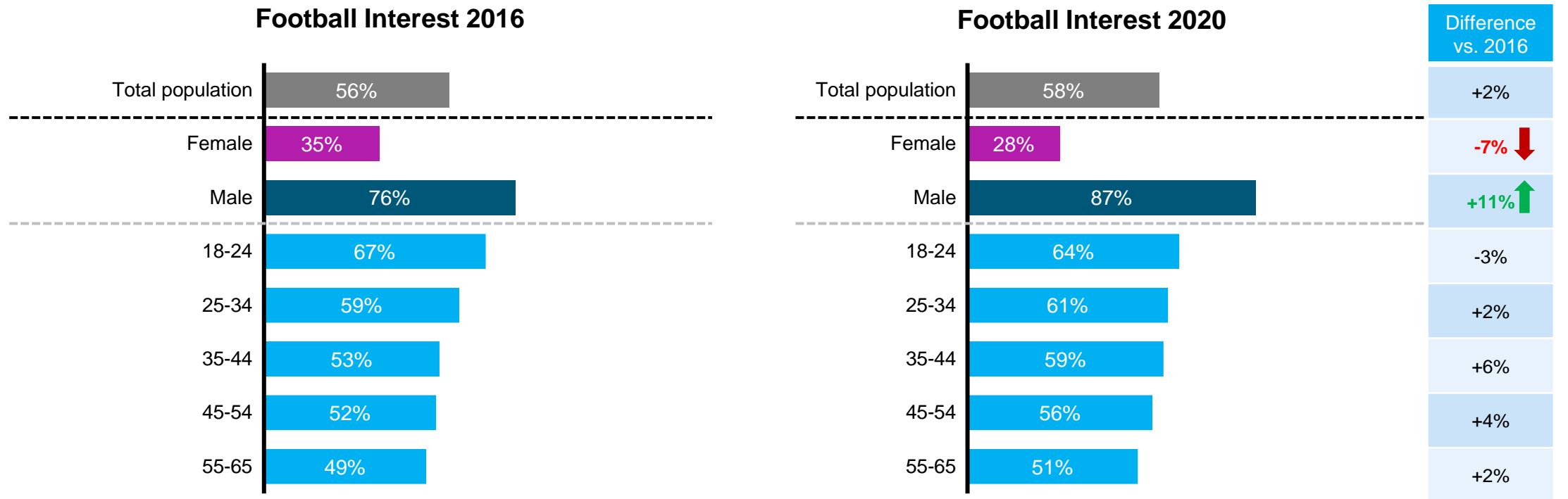
S1: Which of these sports do you follow?
 Base: All respondents 2020 (1015), 2016 (1000), Benchmark (61357)

↑ ↓ Represents a significant increase / decrease vs. 2016 / European Benchmark @ 95% confidence

SPORTS INTEREST OVER TIME

SPLIT BY GENDER AND AGE

While male interest in football has significantly increased since 2016, female interest dropped from 35% to 28%. Football interest slightly dropped among 18-24 years old (67% vs 64%).



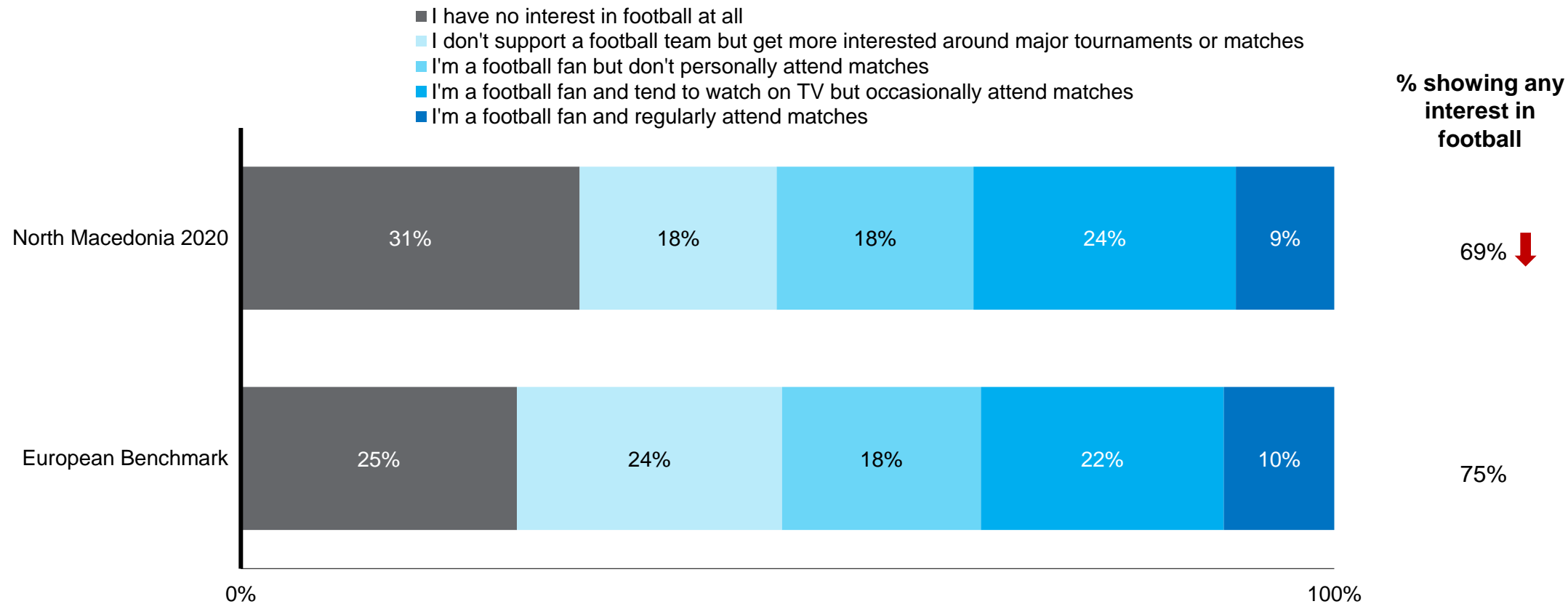
↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

S1. Which of these sports do you follow?

Base: All respondents 2020 (1015), 2016 (1000) / Women 2020 (500), 2016 (493), Men 2020 (515), 2016 (507) / Aged: 18-24 2020 (136), 2016 (150); 25-34 2020 (228), 2016 (227); 35-44 2020 (228), 2016 (212); 45-54 2020 (213), 2016 (208); 55-65 2020 (210), 2016 (203)

FOOTBALL INTEREST

69% of the Macedonian population show an interest in football; this is significantly lower than the European benchmark (75%).



S3: Which of these statements best describes you?
 Base: All respondents 2020 (1015), Benchmark (17784)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

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2. FOOTBALL PARTICIPATION ADULTS & CHILDREN



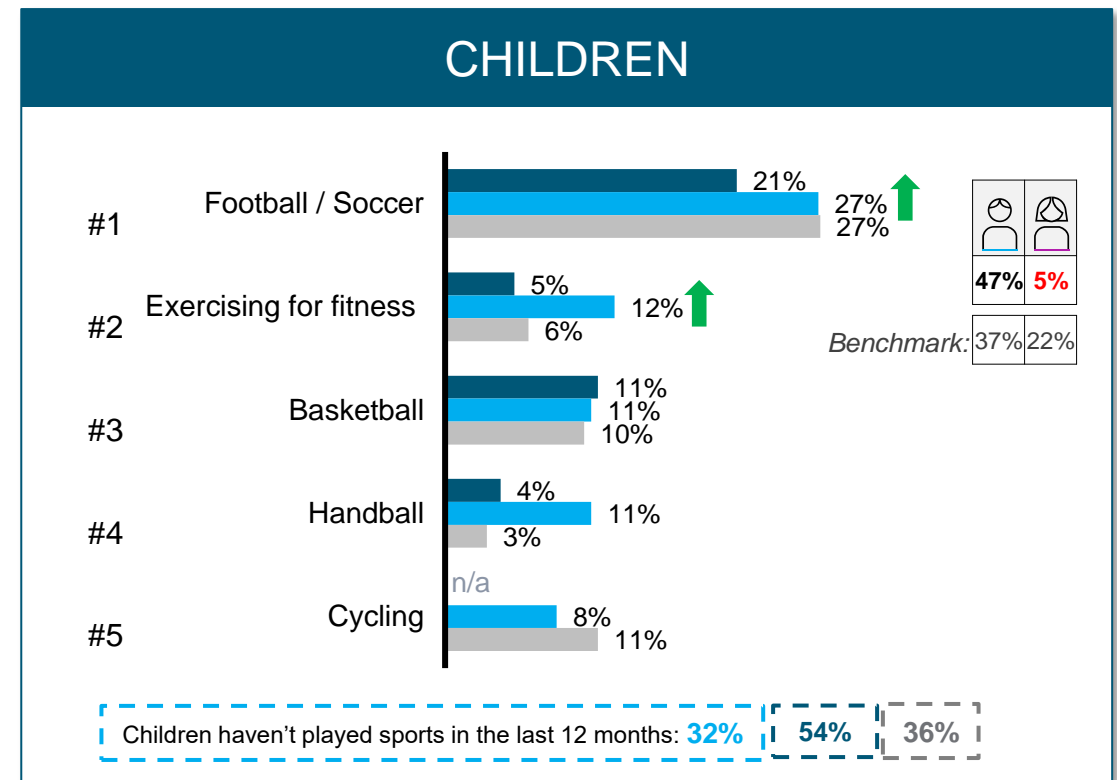
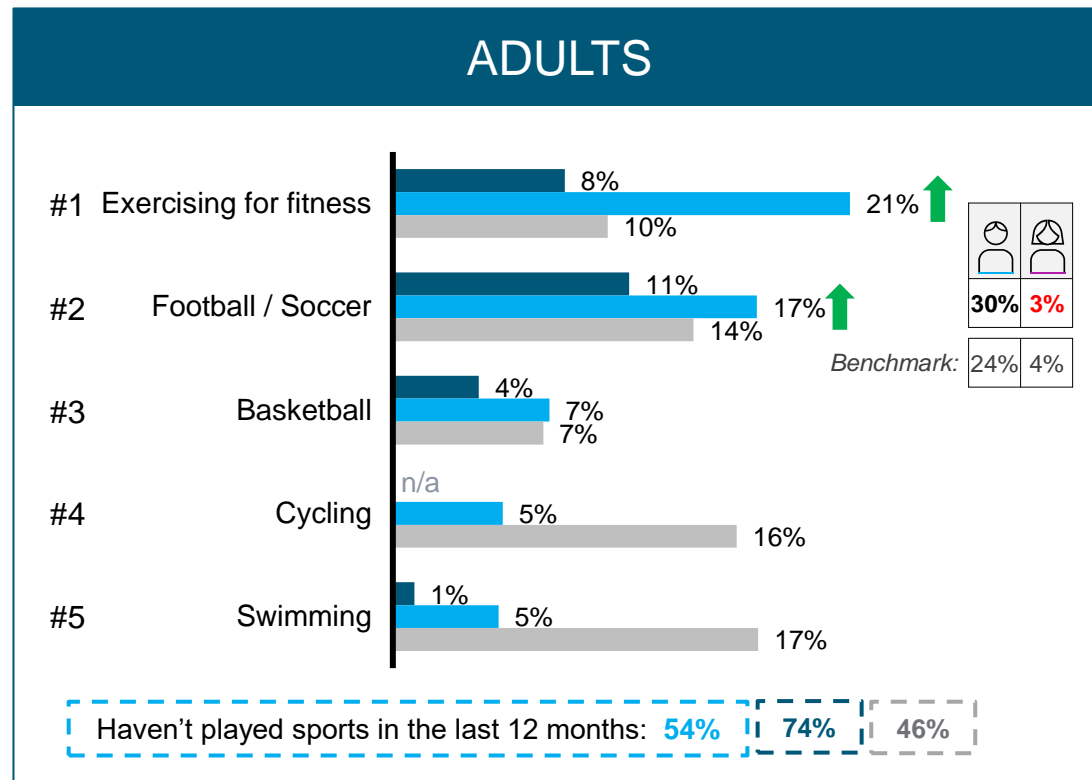
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SPORTS PARTICIPATION: ADULTS & CHILDREN

For adults, football is the 2nd biggest participation activity in Macedonia (17%), behind exercise (21%). For children, football (27%) is the biggest participation sport by a significant margin. Football participation for girls is significantly below the European average (5% vs. 22%).

- Macedonia 2016
- Macedonia 2020
- European Benchmark



P1: Which of these sports do you play? P11: Which of these sports do your children play?

Base: All respondents 2020 (1015), 2016 (1000), Benchmark (61357) / Children aged between 6-17: 2020 (361), 2016 (304), Benchmark (22054)

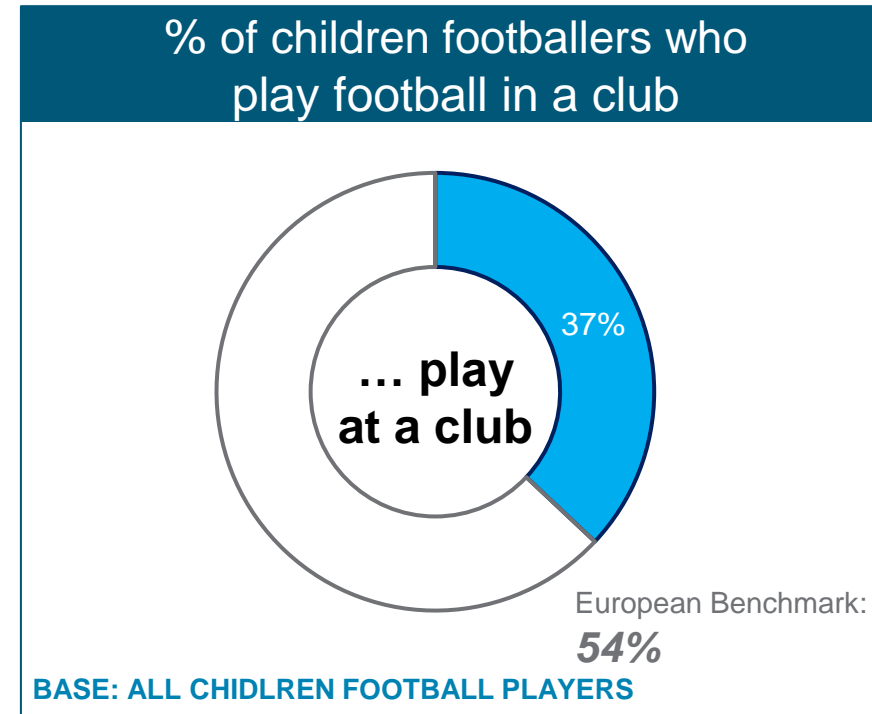
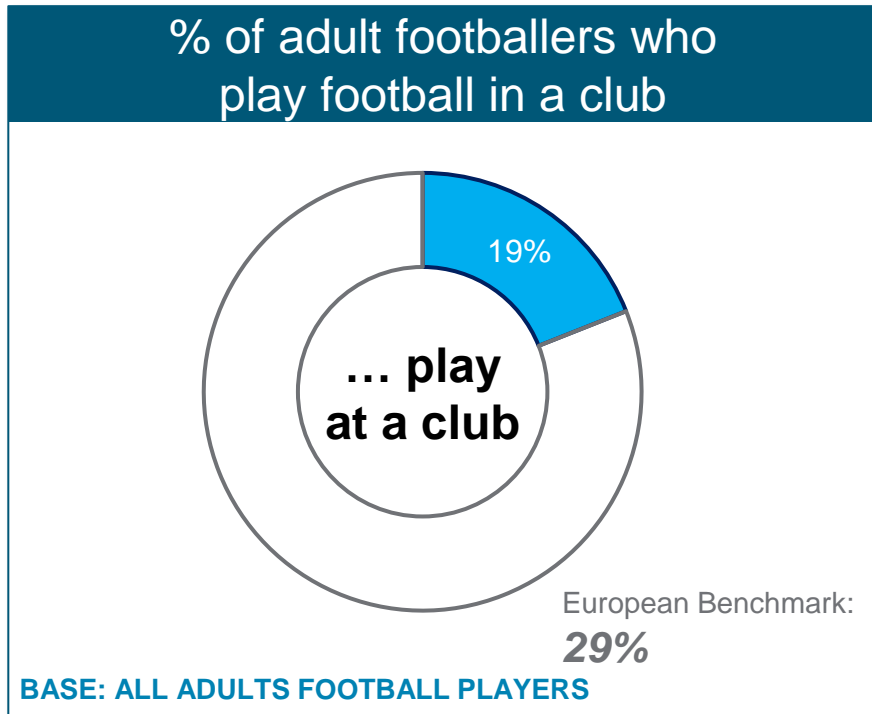
↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

CLUB FOOTBALL PARTICIPATION

ADULTS VS CHILDREN

Registered football participation in Macedonia is low among both adults and children. 19% of adult football players in Macedonia play at a club (European benchmark 29%) while 37% of children football players play at a club (European benchmark 54%).

- Macedonia 2020
- European Benchmark



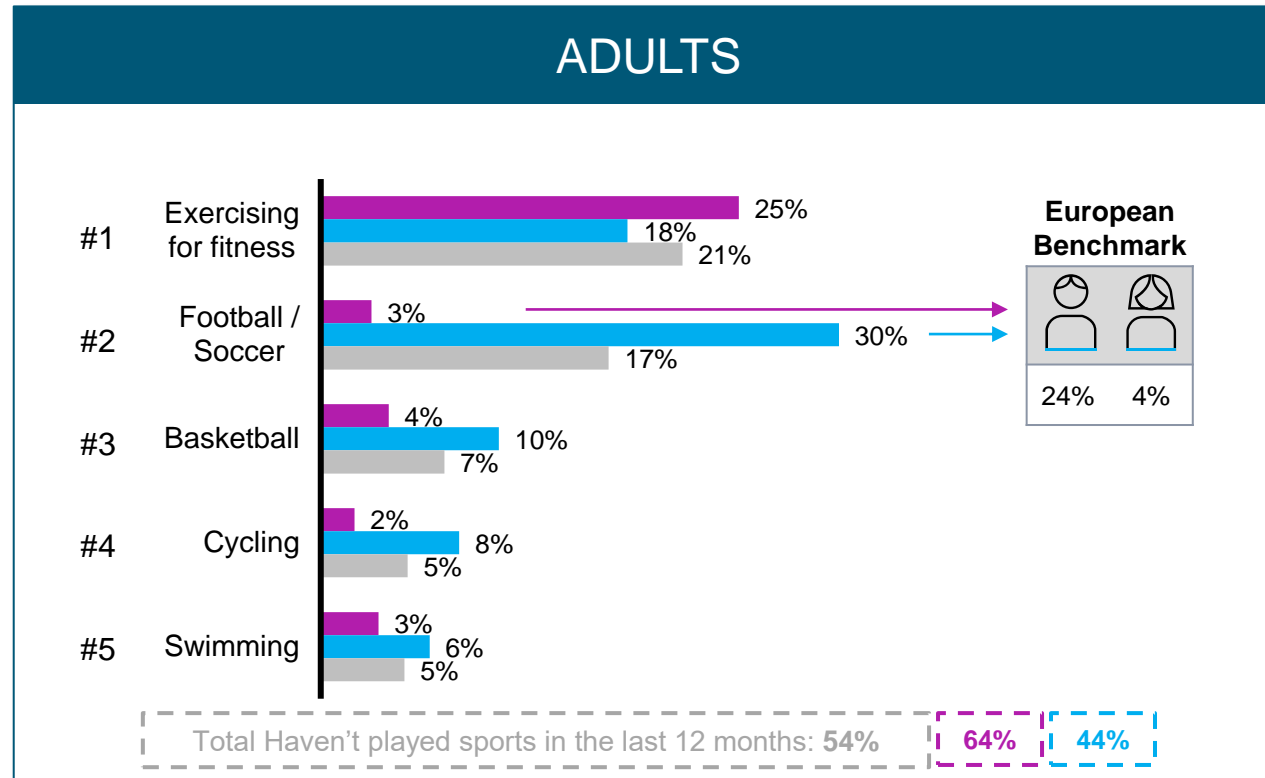
P1a Do you play in a football club? / P11a Do they pay to play football?
 Base: Current Adult football players (172) Benchmark (2382) Current Children football players (97) Benchmark (1721)

↑↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

SPORTS PARTICIPATION: ADULTS BY GENDER

Male football participation in Macedonia is significantly above the European average (30% vs. 24%). However, football participation for women (3%) is slightly below the European average (4%). For women, exercise for fitness is by far the number one participation activity (25%).

■ Women 2020
■ Men 2020
■ Total Population 2020

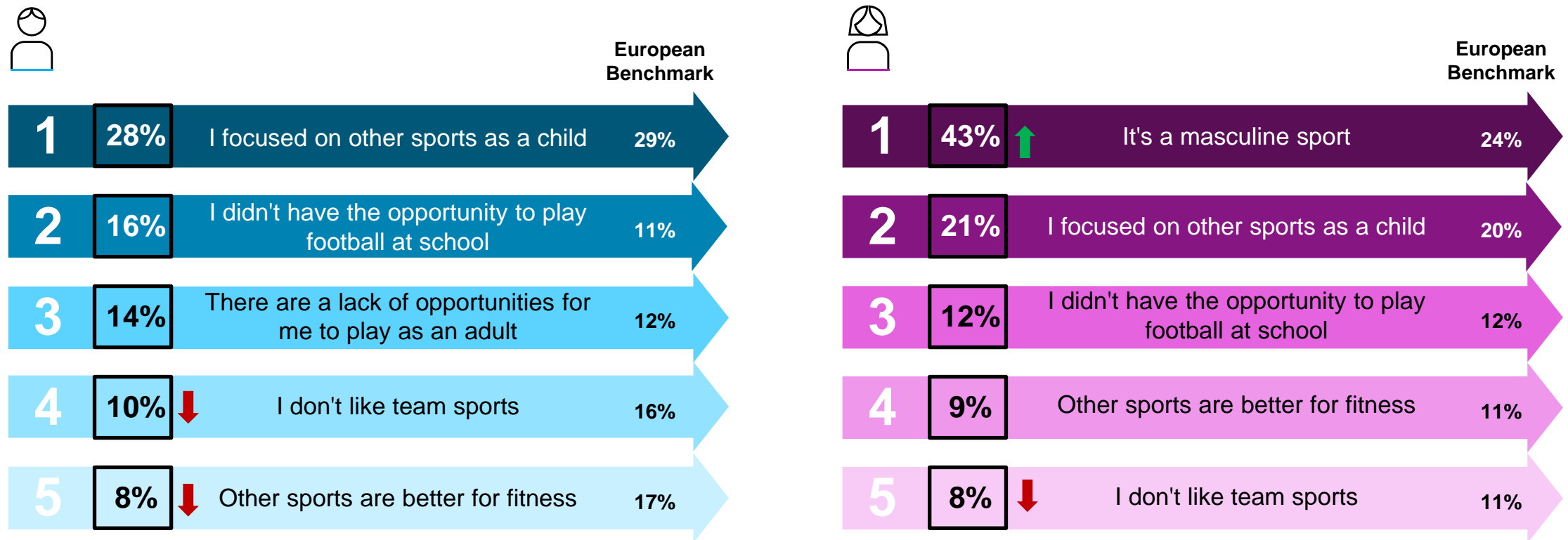


P1: Which of these sports do you play?

Base: All respondents 2020 (1015), Women (500), Men (515) / Benchmark Men (29352) / Benchmark Women (32005)

BARRIERS TO FOOTBALL PARTICIPATION: ADULTS

Being focused on other sports as a child is the top barrier to playing football for males (28%) and the second biggest barrier for females (21%). For men, not having the opportunity to play at school is also a big barrier (16%) while, for women, the clear biggest barrier is the perception that football is a masculine sport (43%).



P10. You said earlier that you don't play football, why is that?

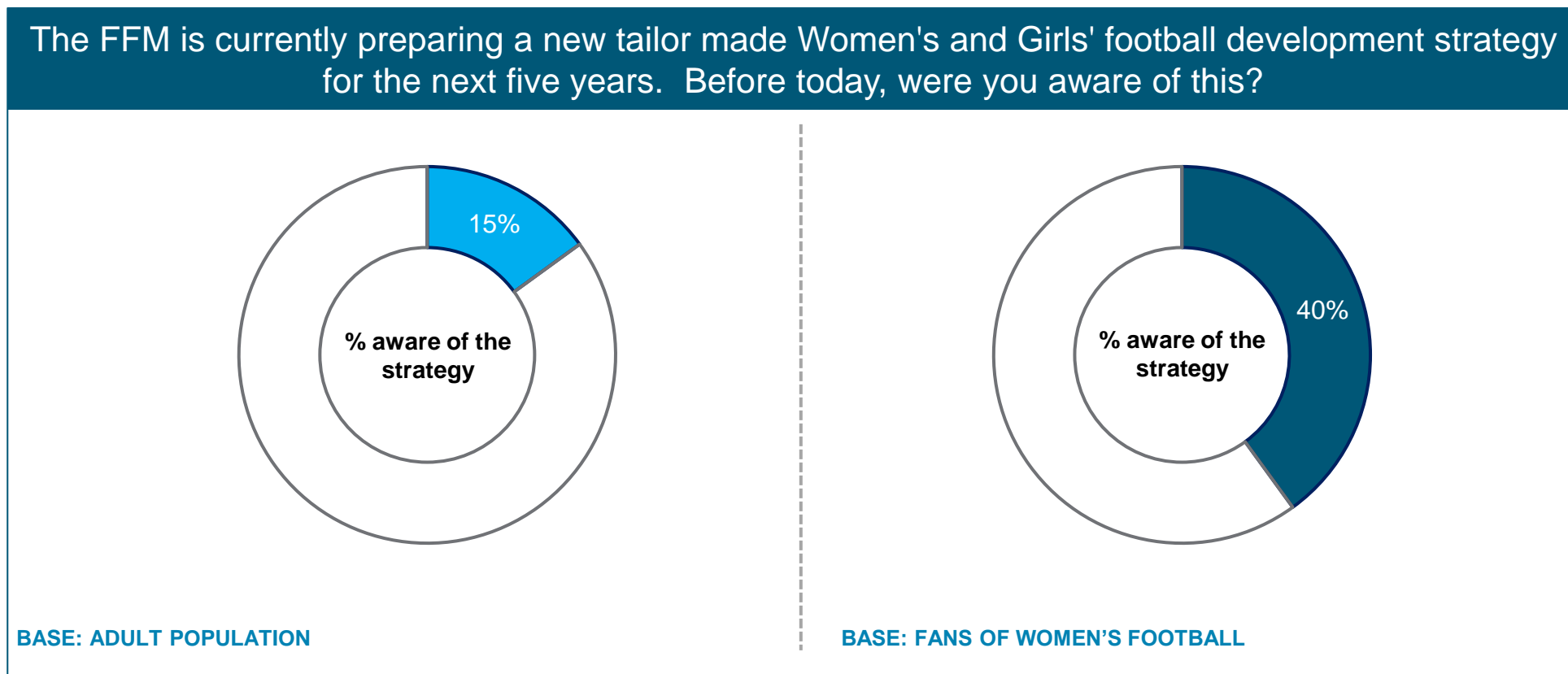
Base: Males who have never played football (161), European benchmark (2343) /
Females who have never played football (464) European benchmark (17493)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

WOMEN'S FOOTBALL AWARENESS

ADULT POPULATION & FANS OF WOMEN'S FOOTBALL

15% of the adult population were aware that the FFM is preparing a new female football development strategy. This rises to 40% among fans of women's football.



FFM10: The FFM is currently preparing a new tailor made Women's and Girls' football development strategy for the next five years. Before today, were you aware of this?
Base: All respondents (993), Fans of Women's Football (110)

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3. WOMEN'S FOOTBALL



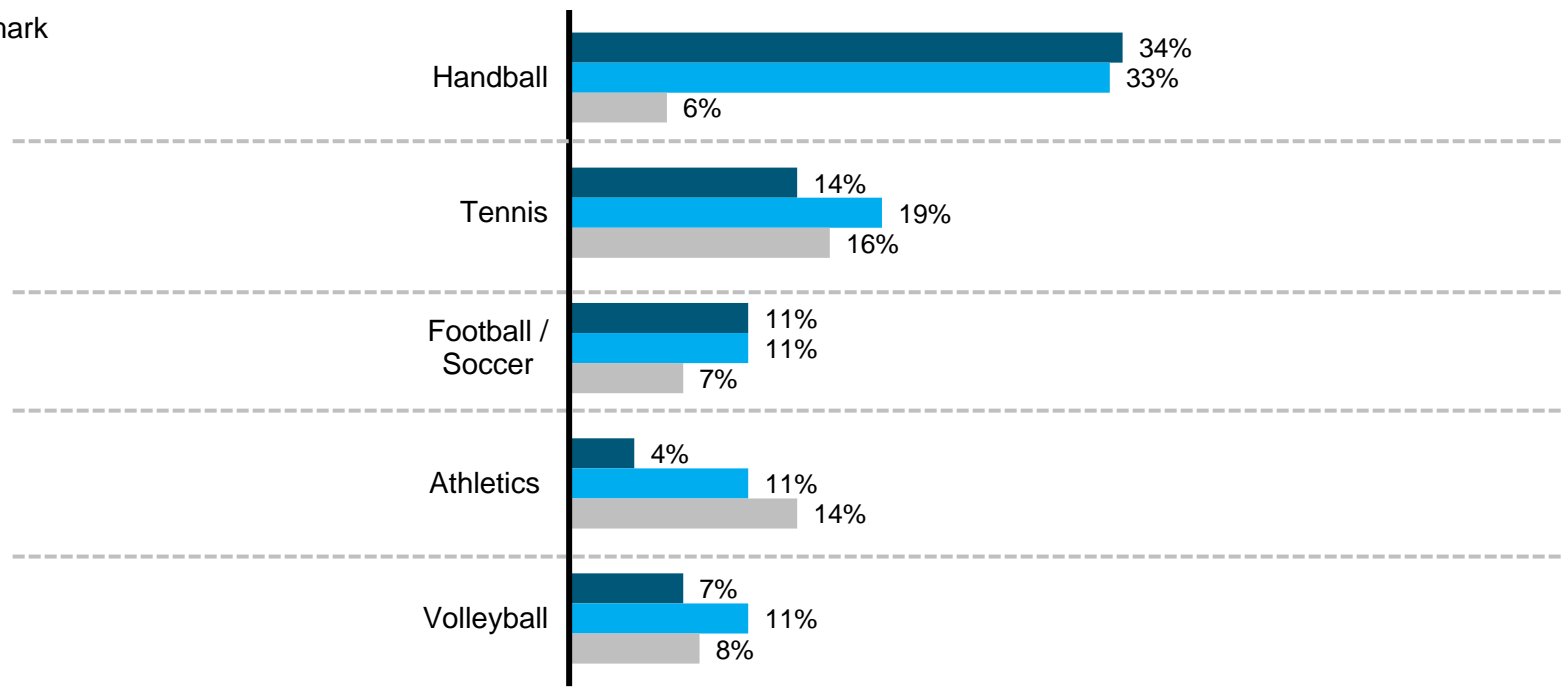
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WOMEN'S SPORTS INTEREST

Interest in women's football has remained stable since 2016 (11%); it is significantly higher than the European average (7%). Women's football is the joint 3rd most popular women's sport behind handball (33%) and tennis (19%).

- Macedonia 2016
- Macedonia 2020
- European Benchmark



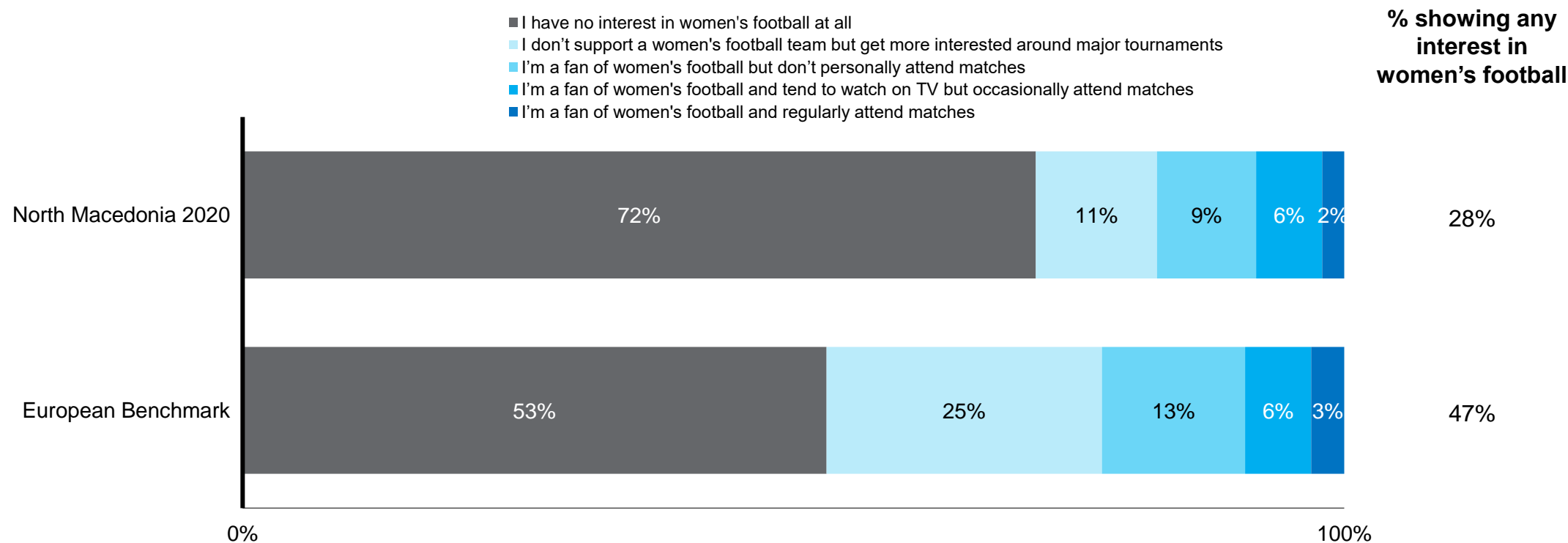
*Interest is defined as "interest in women's competitions" and "interest in both men and women's competitions"
 *Sport following is defined as "anything from supporting a team / player through to watching the sport on TV, reading about in newspapers or online"

W1: And of the sports you follow, do you follow the men's or women's competition, or both?
 Base: All respondents 2020 (1015), 2016 (1000), Benchmark (61357)

↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

WOMEN'S FOOTBALL INTEREST

Just over a quarter (28%) of the adult population show some interest in women's football – significantly below the European average (47%).

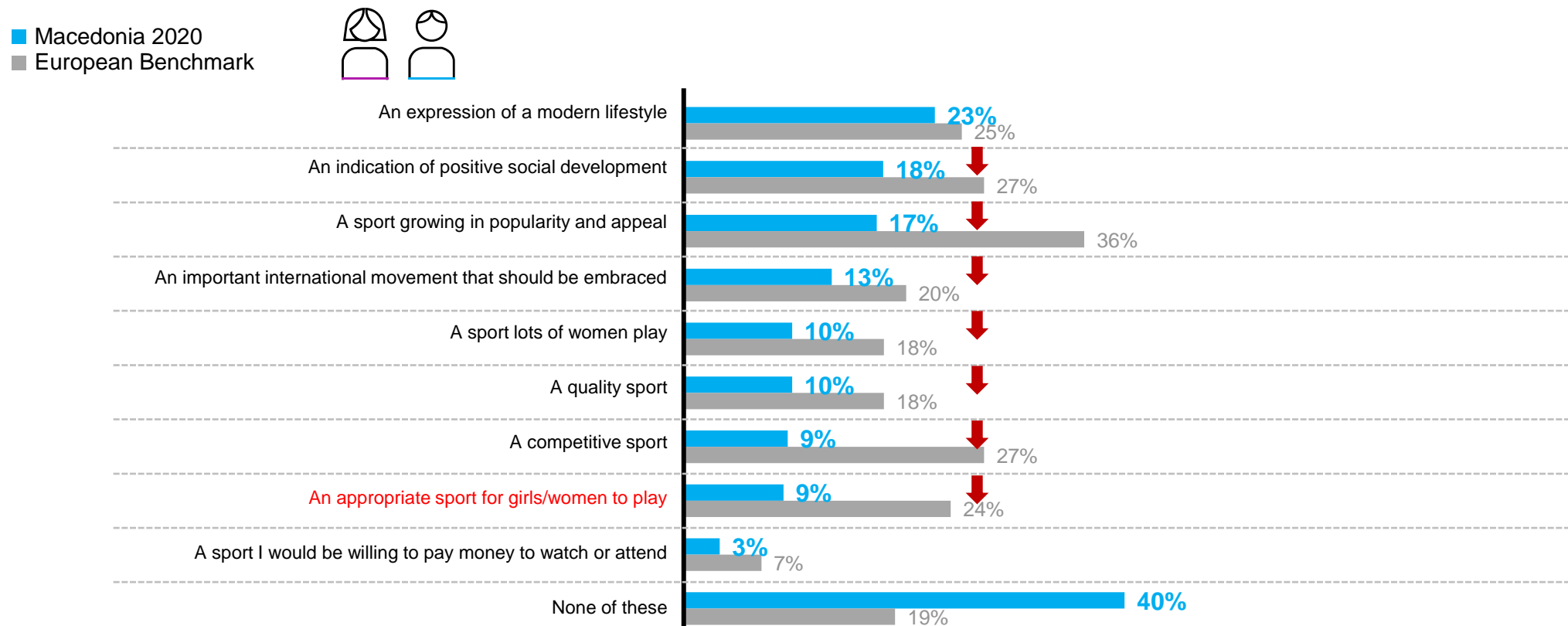


W3: Which of these statements best describes you and women's football?
 Base: All respondents 2020 (1015), Benchmark (17784)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

ATTITUDES TO WOMEN'S FOOTBALL (%)

Just under a quarter (23%) of Macedonians agree that women's football is an expression of a modern lifestyle and 18% agree that it is an indication of positive social development. However just 9% believe that is an appropriate sport for girls/women to play (vs. 24% benchmark).

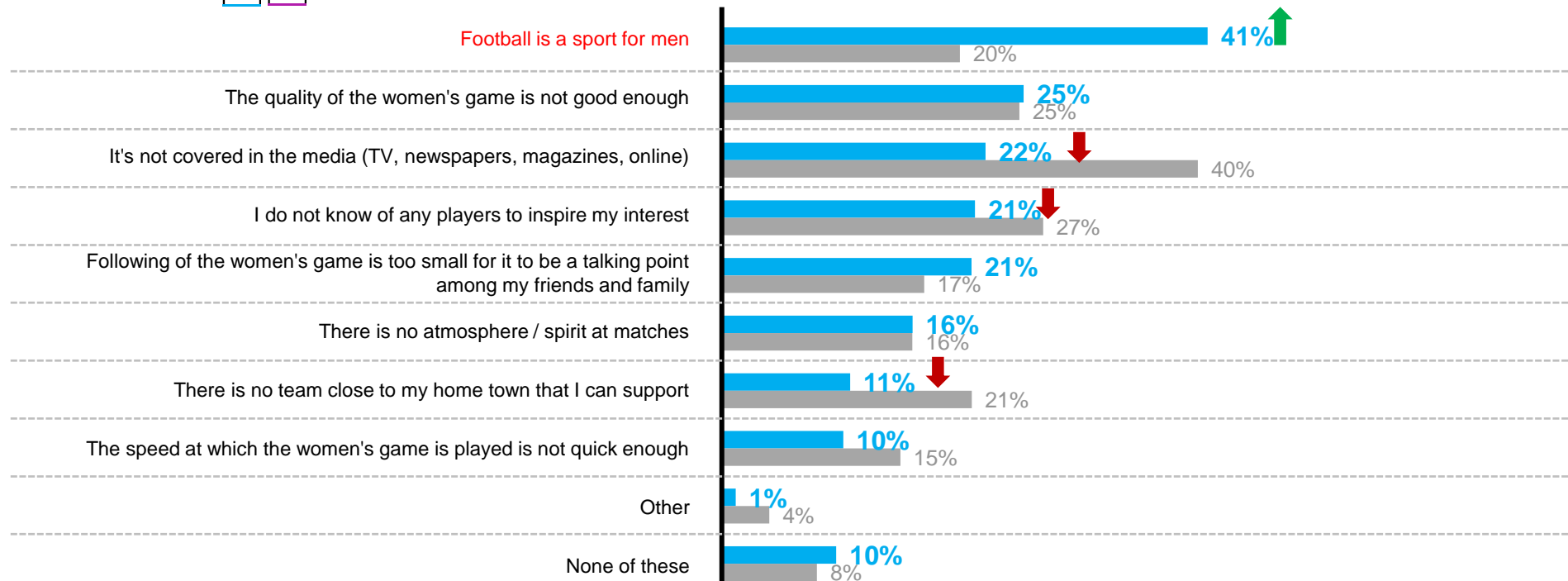
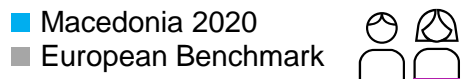


W4: Which of the below statements, if any, apply to women's football?
 Base: All respondents 2020 (1015), Benchmark (38843)

↑ ↓ Represents a significant increase / decrease vs. European Benchmark @ 95% confidence

BARRIERS TO FOLLOWING WOMEN'S FOOTBALL (%)

The biggest barrier to following women's football is the perception that football is a sport for men (41% vs. benchmark score of 20%). A quarter (25%) also mention a lack of quality while 21% say that they don't know of any players to inspire interest.



W5: Which of the following describes why you do not follow women's football?
 Base: Football Fans who don't follow Women's football: 2020 (343), Benchmark (17924)

↑ ↓ Represents a significant increase / decrease vs. European Benchmark @ 95% confidence

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4. DOMESTIC FOOTBALL



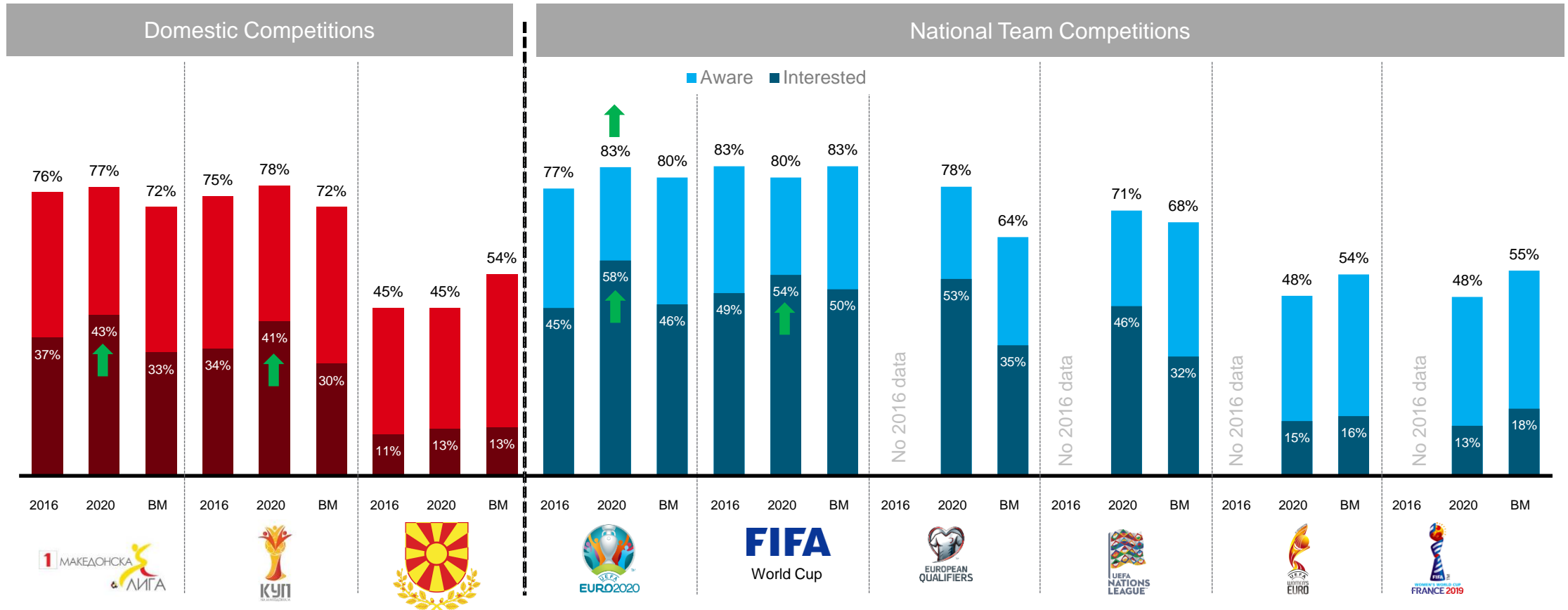
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AWARENESS & INTEREST: DOMESTIC & INTERNATIONAL COMPETITIONS

ADULT POPULATION

Interest in all 3 domestic Macedonian leagues has increased since 2016 – significantly so for the Macedonian First Football League (43% vs. 37%) and the Macedonian Football Cup (41% vs. 34%) . Both of these scores are significantly higher than the European benchmarks (33% and 30% respectively). Interest in UEFA EURO has increased significantly since 2016 (58% vs 45%) while it is also significantly higher than the European benchmark (46%).



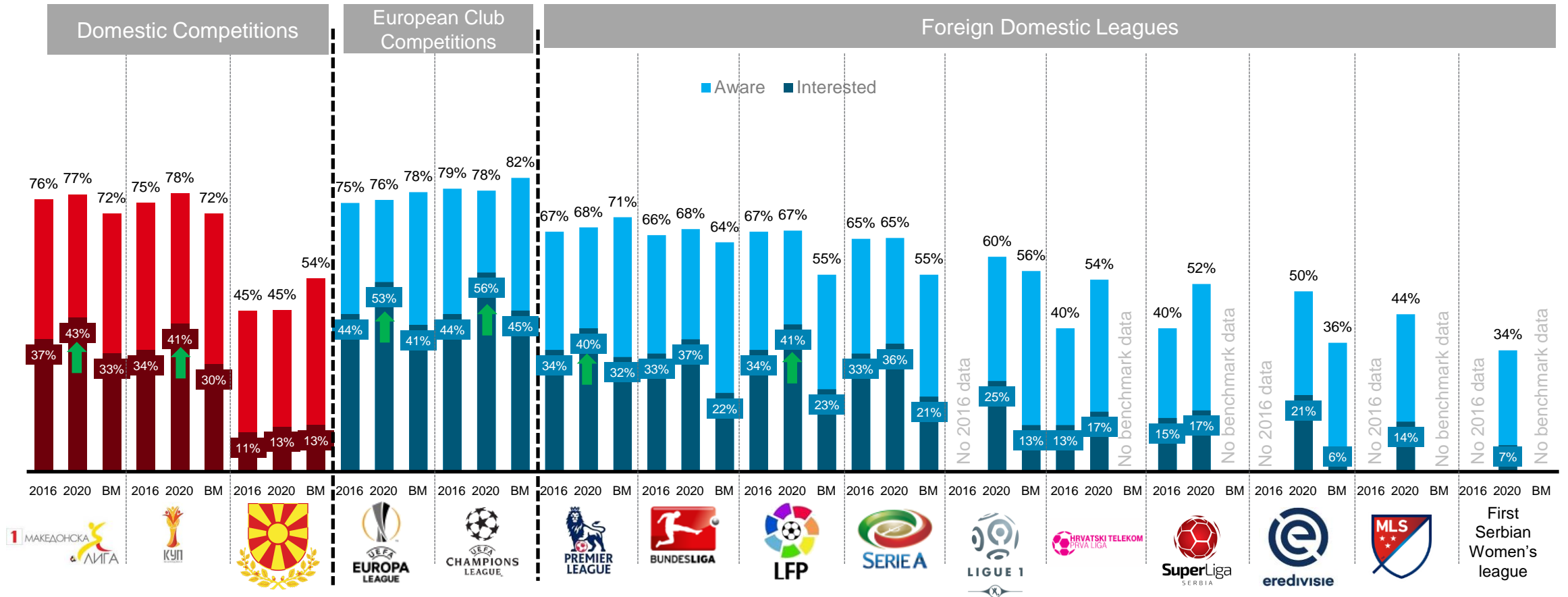
F2: Are you aware of or interested in this football competition?
 Base: Total sample 2020 (1015), 2016 (1000), Benchmark (61357)

↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

AWARENESS & INTEREST: DOMESTIC & INTERNATIONAL COMPETITIONS

ADULT POPULATION

Interest in The Macedonian First Football League (43%) is behind only the UEFA Champions League (56%) and the UEFA Europa League (53%) in terms of the European men's domestic club competitions.



F2: Are you aware of or interested in this football competition?
 Base: Total sample 2020 (1015), 2016 (1000) Benchmark (61357)

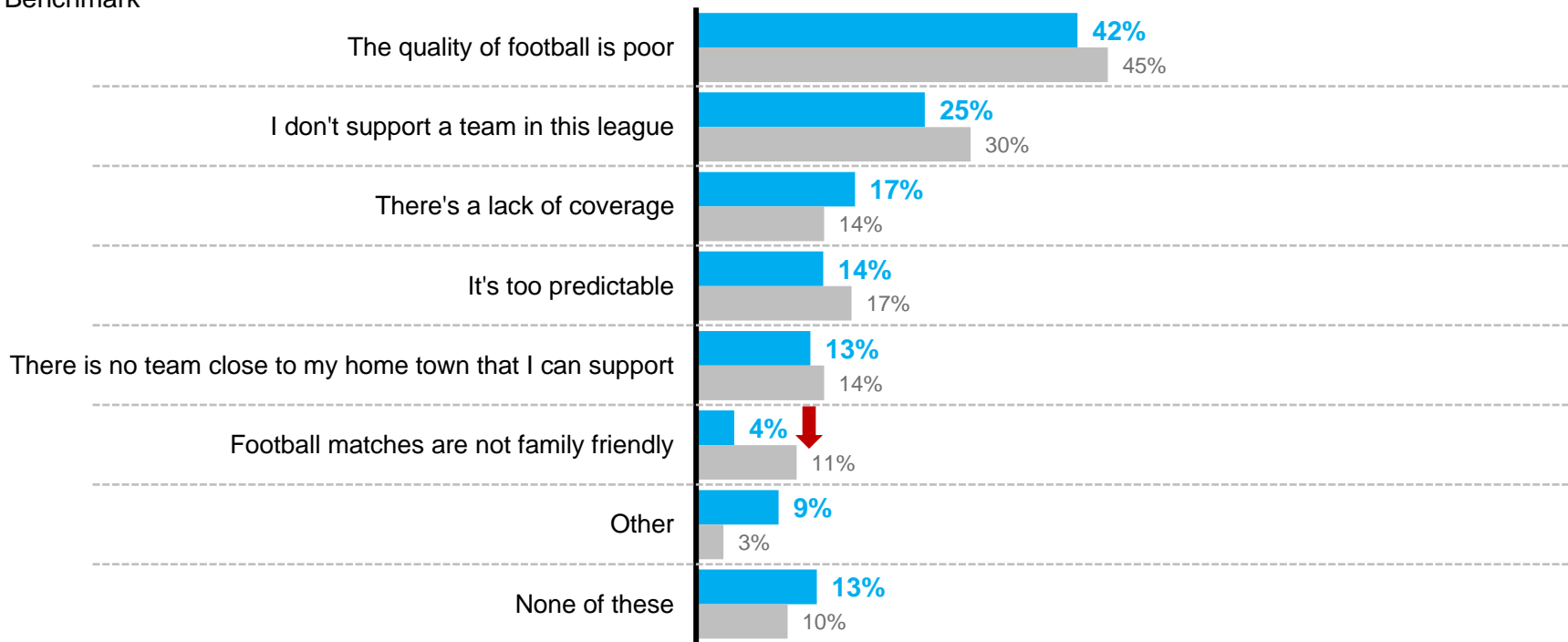
↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

REASONS FOR LACK OF INTEREST IN THE MACEDONIAN FIRST FOOTBALL LEAGUE

FOOTBALL FANS (%)

Among football fans, the biggest reason for a lack of interest in the Macedonian First Football League is by far the poor quality of football (42%). This is in line with the European benchmark (45%). 25% said they don't support a team in the league (slightly below the European benchmark of 30%).

■ Macedonia 2020
 ■ European Benchmark



F3: Why are you not interested in the Domestic League?
 Base: Football fans not interested in the domestic league: 2020 (144), Benchmark (2659)

↑ ↓ Represents a significant increase / decrease vs. European Benchmark @ 95% confidence

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5. INTERNATIONAL FOOTBALL



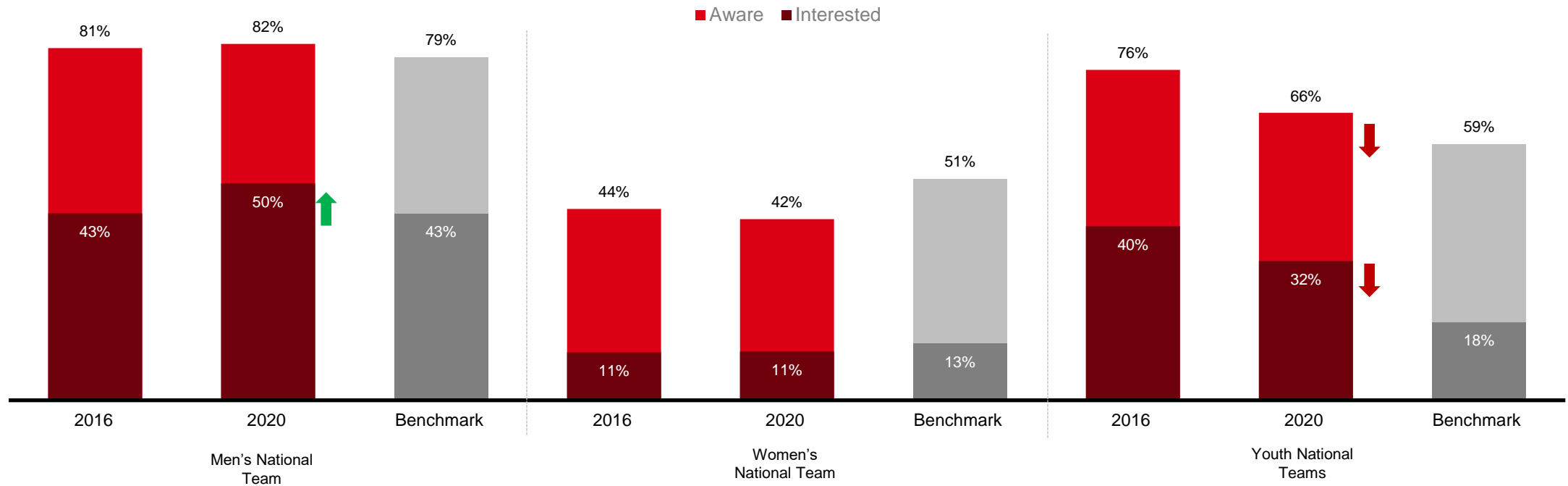
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NATIONAL TEAM AWARENESS AND INTEREST

ADULT POPULATION

Interest in the Men's National Team has increased significantly since 2016 (50% vs 48%). Interest for the Women's National Team is flat while there have been significant decreases for Youth National Teams (32% vs 40%). Interest in the Youth National team remains significantly higher than the benchmark (18%).



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

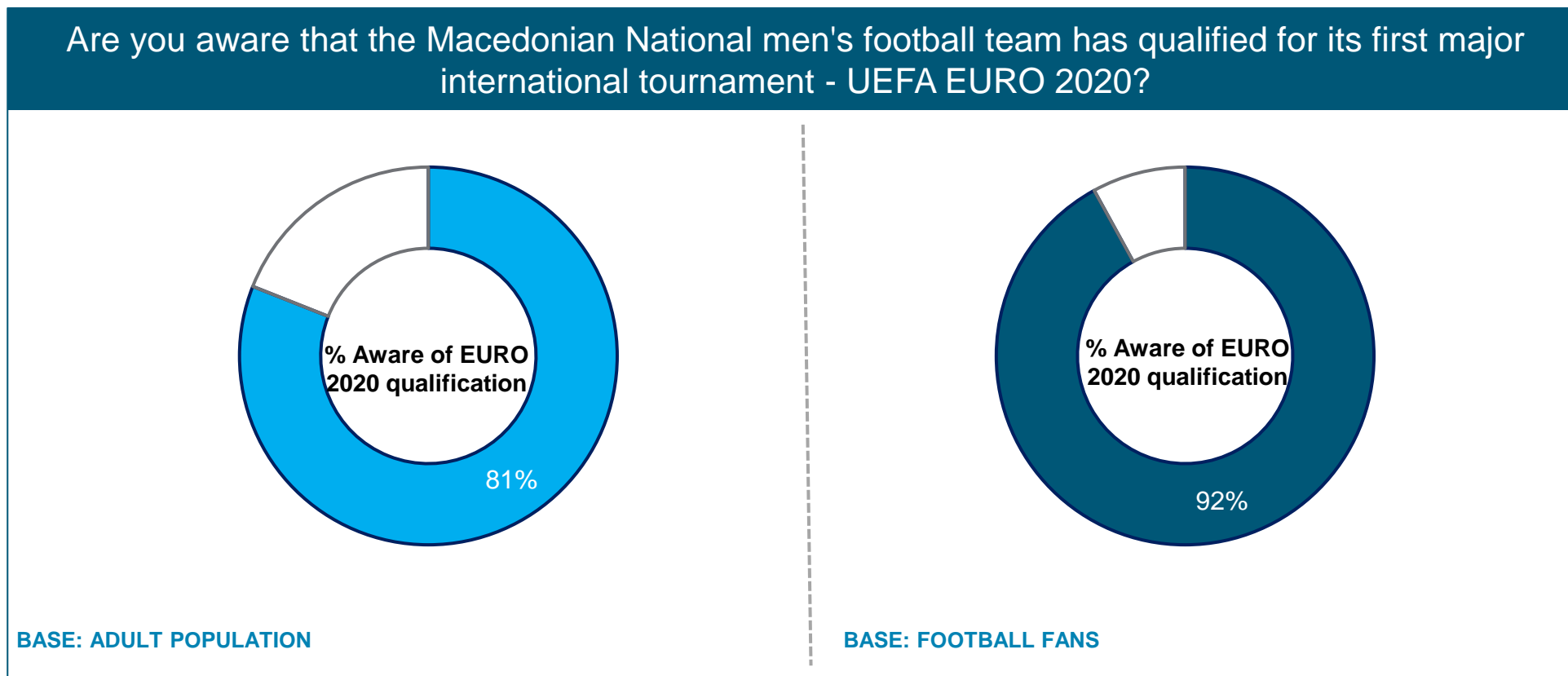
Base: All respondents 2020 (1015), 2016 (1000), Benchmark (61357)

↑ ↓ Represents a significant increase / decrease vs. 2016 @ 95% confidence

UEFA EURO 2020: QUALIFICATION AWARENESS

ADULT POPULATION & FOOTBALL FANS

Over 4 in 5 Macedonians (81%) are aware that the Men's National Team has qualified for UEFA EURO 2020; this rises to 92% among football fans.



FFM1: Are you aware that the Macedonian National men's football team has qualified for its first major international tournament - UEFA EURO 2020 - following a play off win against Georgia on November 12th?

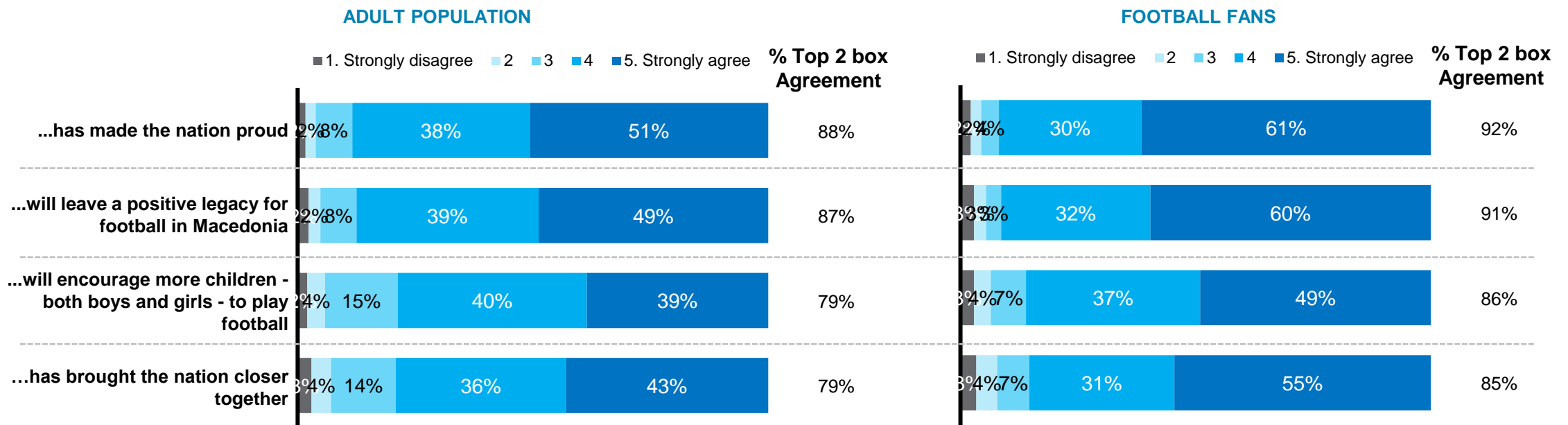
Base: All respondents 2020 (1015) Football Fans (587)

UEFA EURO 2020: QUALIFICATION IMPACT

ADULT POPULATION & FOOTBALL FANS

Almost 9 in 10 Macedonians (88%) agree that the men’s national team’s qualification for UEFA EURO 2020 has made the nation proud while 87% agree that it will leave a positive legacy for football in the country. The corresponding figures for football fans are 92% and 91% respectively.

The success of the men's football team in qualifying for UEFA EURO 2020...



FFM2. How much do you agree or disagree with the following statements about the impact of the men's national football team's qualification for UEFA EURO 2020? The success of the men's football team in qualifying for UEFA EURO 2020 ...

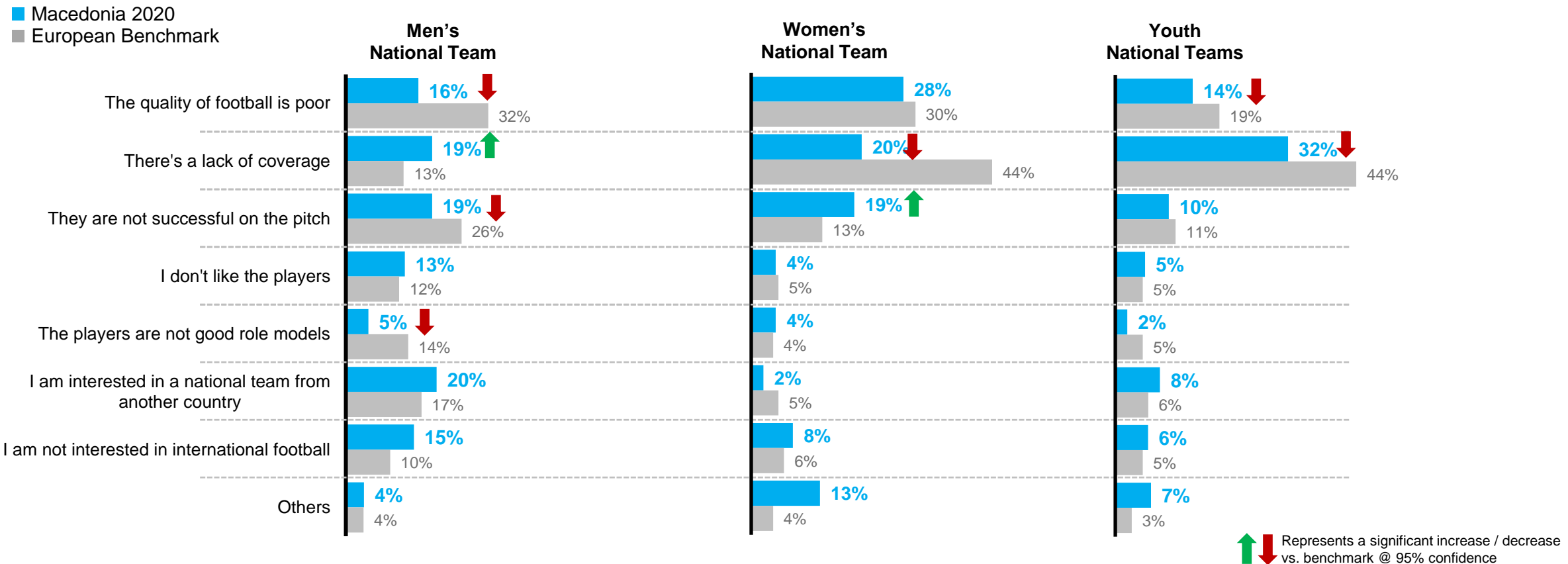
Base: All respondents 2020 (1015), Football Fans (587)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

REASONS FOR LACK OF INTEREST IN NATIONAL TEAMS

FOOTBALL FANS NOT INTERESTED IN EACH TEAM (%)

The biggest reason for a lack of interest in the Men's National Team is an interest in a national team of another country (20%) followed by a lack of coverage and being unsuccessful (both 19%). The main reason for not following the Youth National Teams is a lack of coverage (32%) while a lack of quality is the biggest interest barrier for the women's national team (28%).



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: Football fans not interested in: Men's national team (98), Women's National Team (223), Youth national teams (184) Benchmark: Men's national team (1789), Women's National Team (3568), Youth national teams (3860)

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6. FFM PERCEPTIONS & COMMUNICATIONS

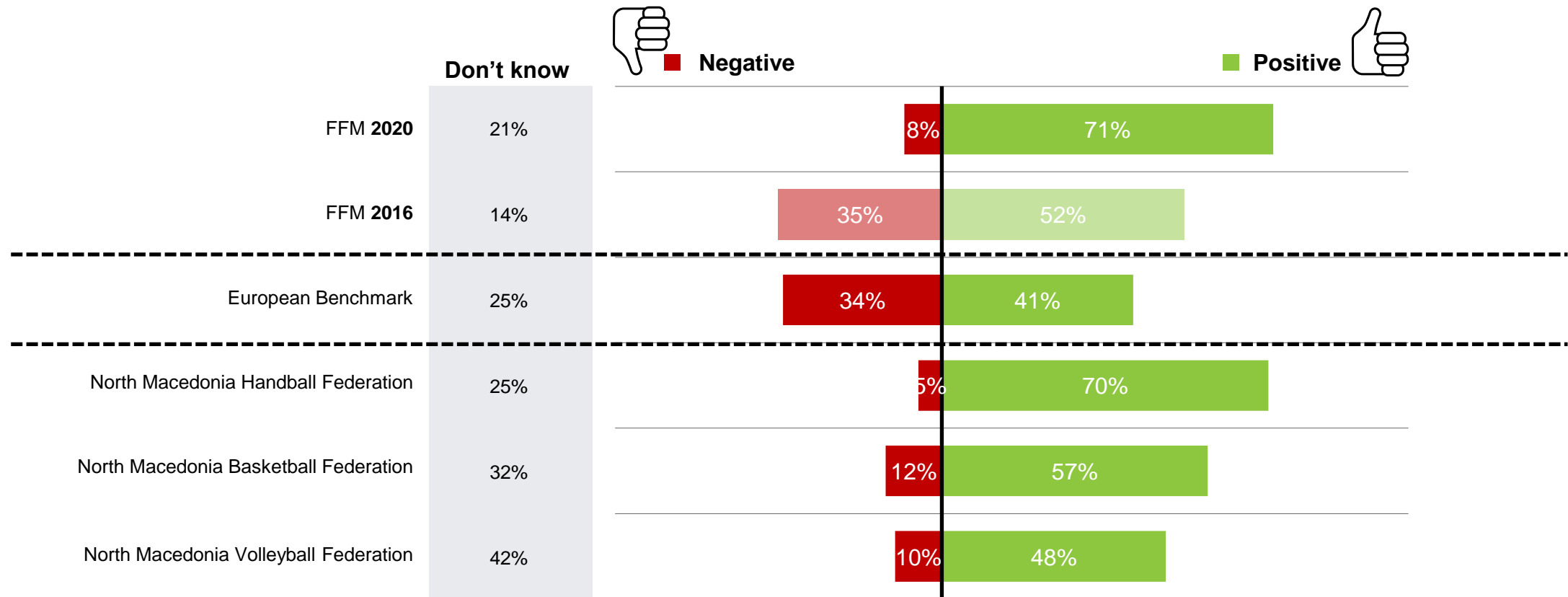


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IMAGE OF SPORTING ORGANISATIONS (%)

71% believe that the FFM has a positive overall image which is a big improvement and a significant increase vs. 2016 (52%) positive. Scores are now significantly above the European benchmark (41%). The Handball Federation has a similarly high positive image (70%).



NA22: How do you rate the overall image of each organisation?

Base: All respondents offering an opinion 2020 (1015), 2016 (1000), Benchmark (50548)

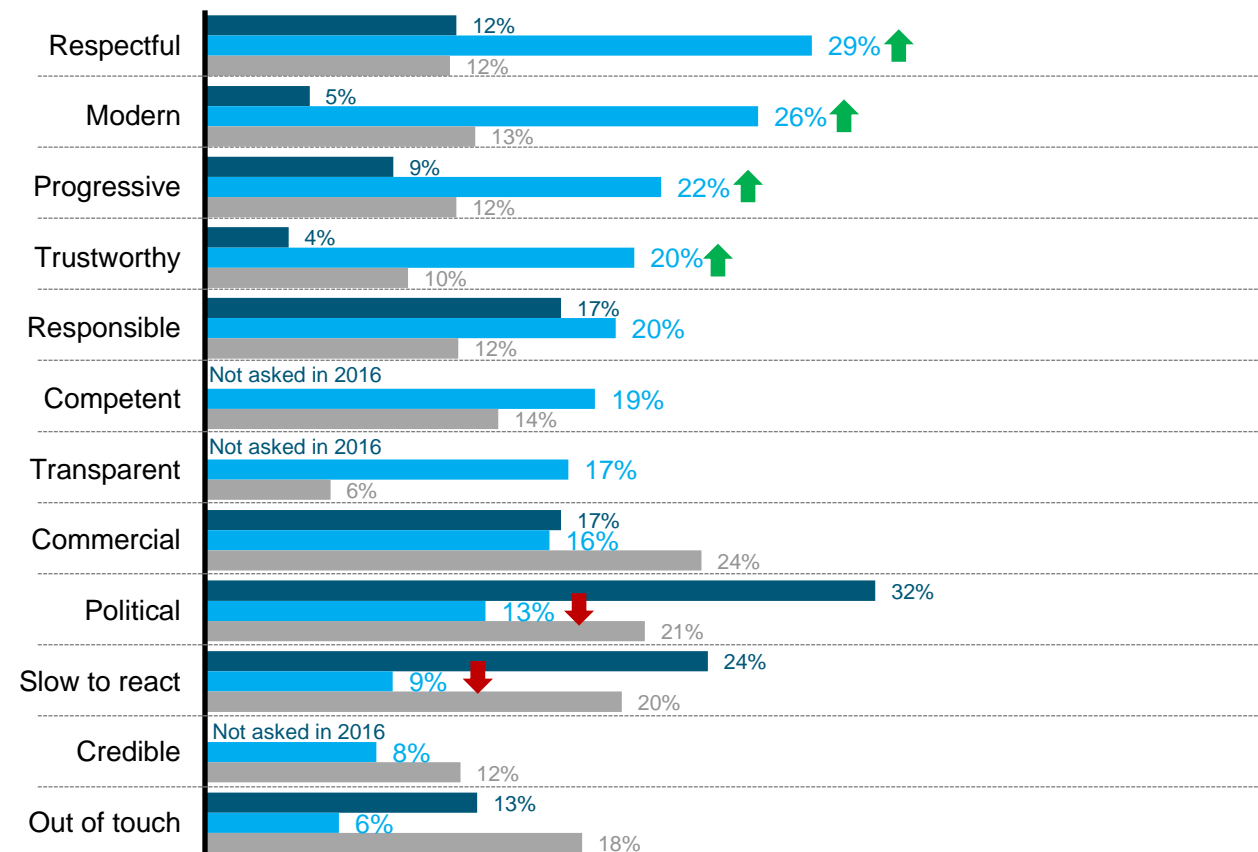
↑↓ Represents a significant increase / decrease vs. Benchmark @ 95% confidence

FOOTBALL FEDERATION OF MACEDONIA IMAGERY

Positive perceptions of the FFM have increased significantly since 2016. The Federation is now most closely associated with being Respectful (29% vs. 12% in 2016), Modern (26% vs. 5%), Progressive (22% vs. 9%), and trustworthy (20% vs. 4%). Negative perceptions have also decreased significantly (e.g. political & slow to react).



- Macedonia 2016
- Macedonia 2020
- European Benchmark

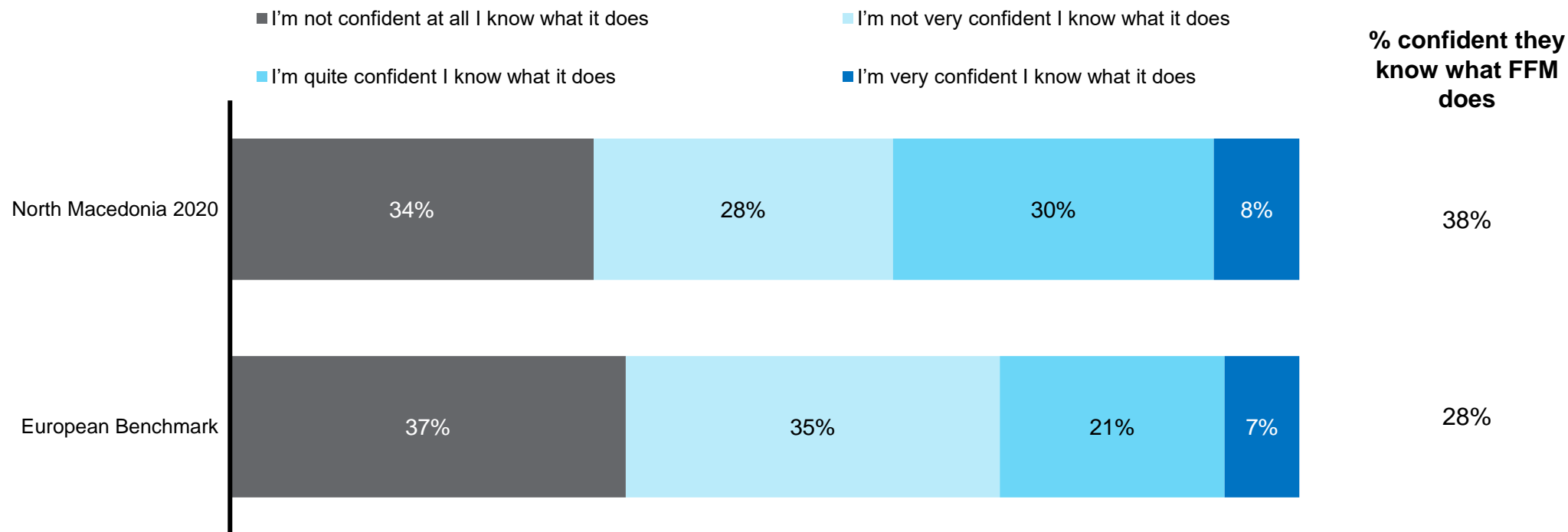


NA3: Which of these words or phrases describe the following organisations?
 Base: All respondents 2020 (1015) All respondents 2016 (1000), Benchmark (57356)

↑ ↓ Represents a significant increase vs. 2016
 @ 95% confidence

AWARENESS OF ORGANISATIONAL ACTIVITY

Almost 4 in 10 (38%) are confident that they know what the Macedonian Football Federation does. This is significantly higher than the European average (28%).



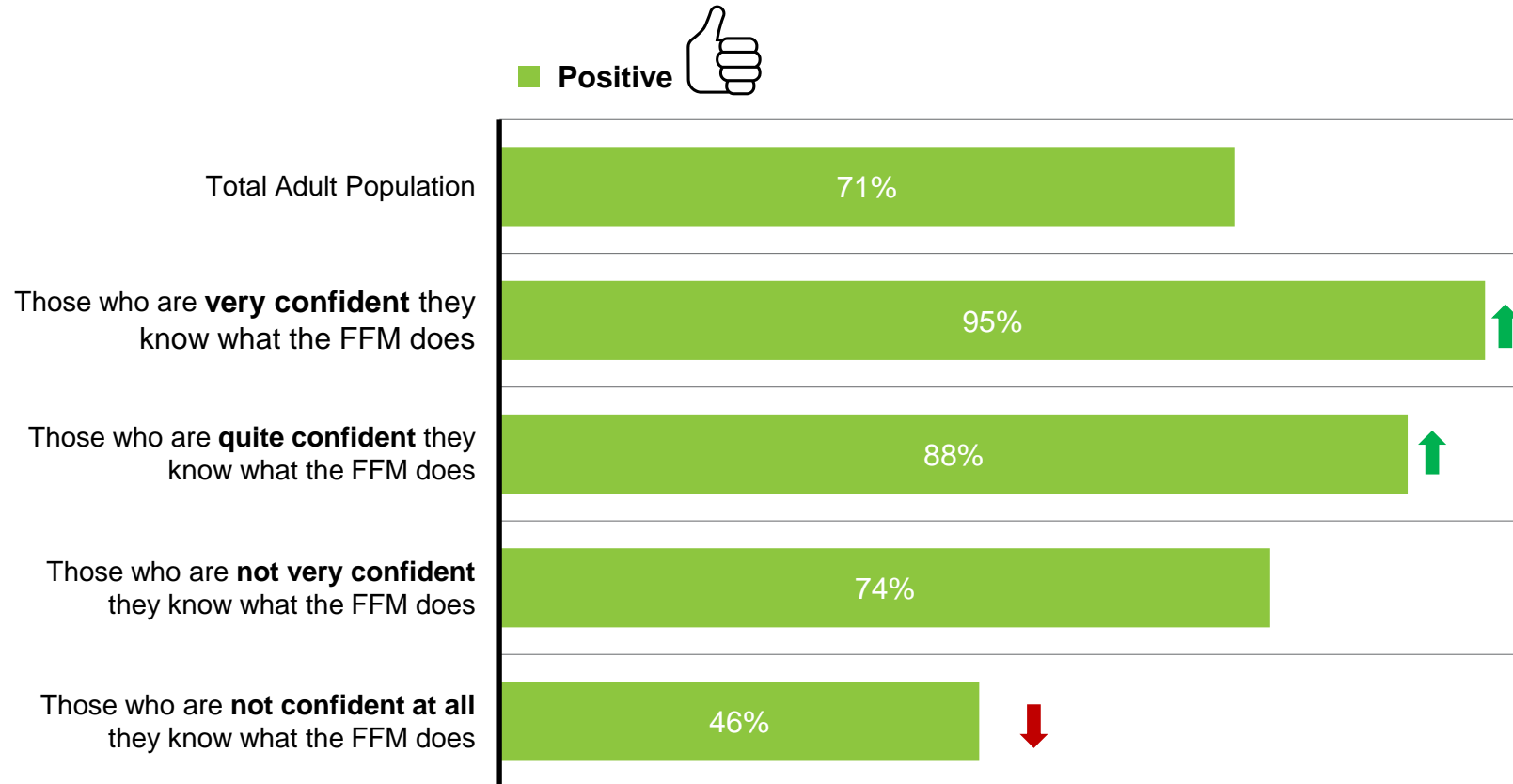
↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

NA7: How much do you know about what the Football Federation of Macedonia does day-to-day in leading, developing and promoting football in this country?
 Base: All respondents 2020 (1015), Benchmark 2020 (28802)

IMAGE OF FOOTBALL FEDERATION OF MACEDONIA

IMPACT OF KNOWLEDGE OF WHAT THE FFM DOES



Those who are either very (95%) or quite (88%) confident they know what the FFM does are significantly more positive about it compared to those who are not confident at all (46%).



NA22: How do you rate the overall image of each organisation?

Base: All respondents 2020 (1015), Very confident they know what FFM does (84) Quite confident they know what FFM does (302)

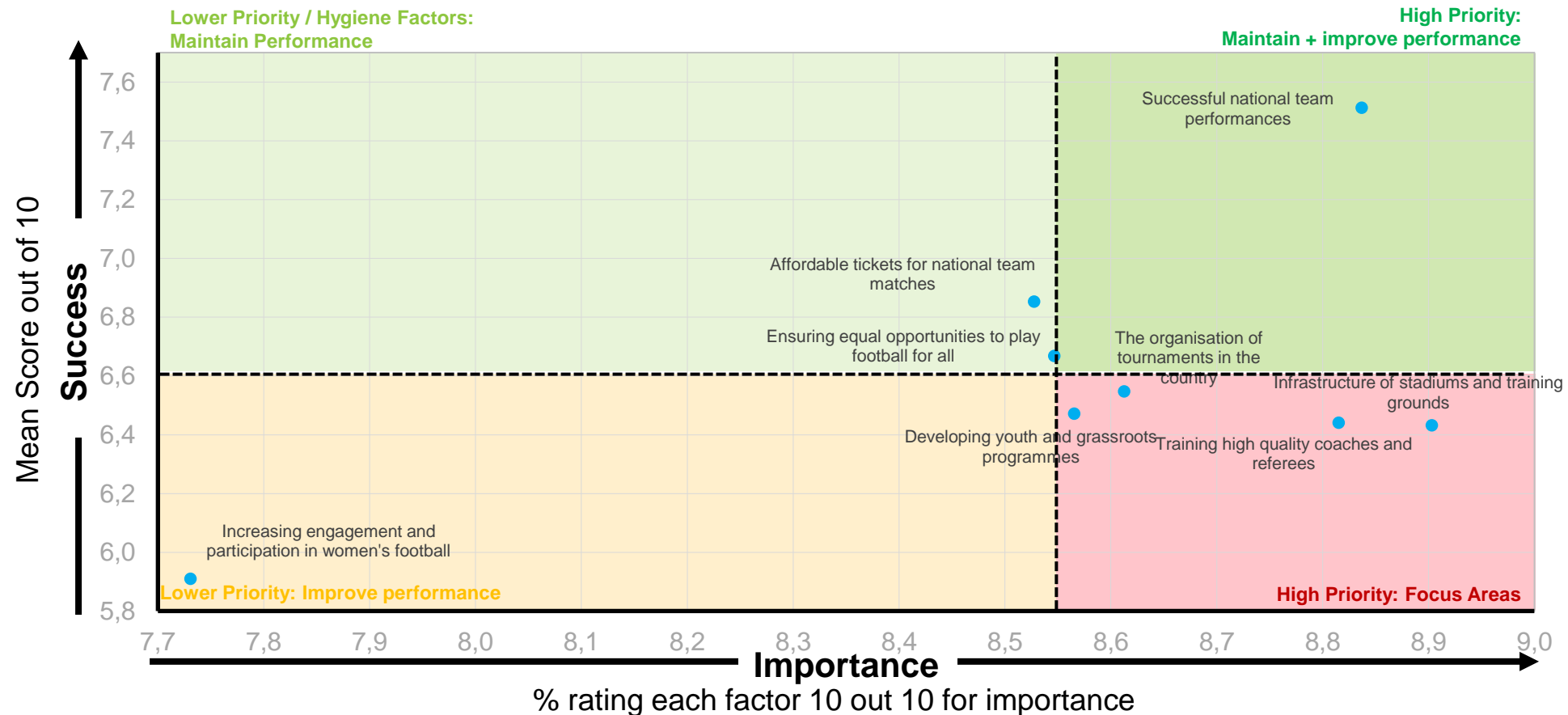
Not very confident they know what FFM does (286) Not at all confident they know what FFM does (343)

  Represents a significant increase / decrease vs. Adult population @ 95% confidence

IMPORTANCE OF FACTORS VS. SUCCESS OF FFM

FOOTBALL FANS

The FFM's best performance is in relation to the second highest priority – successful national team performances. High priority areas for the FFM include football infrastructure and the training of high quality coaches and referees.



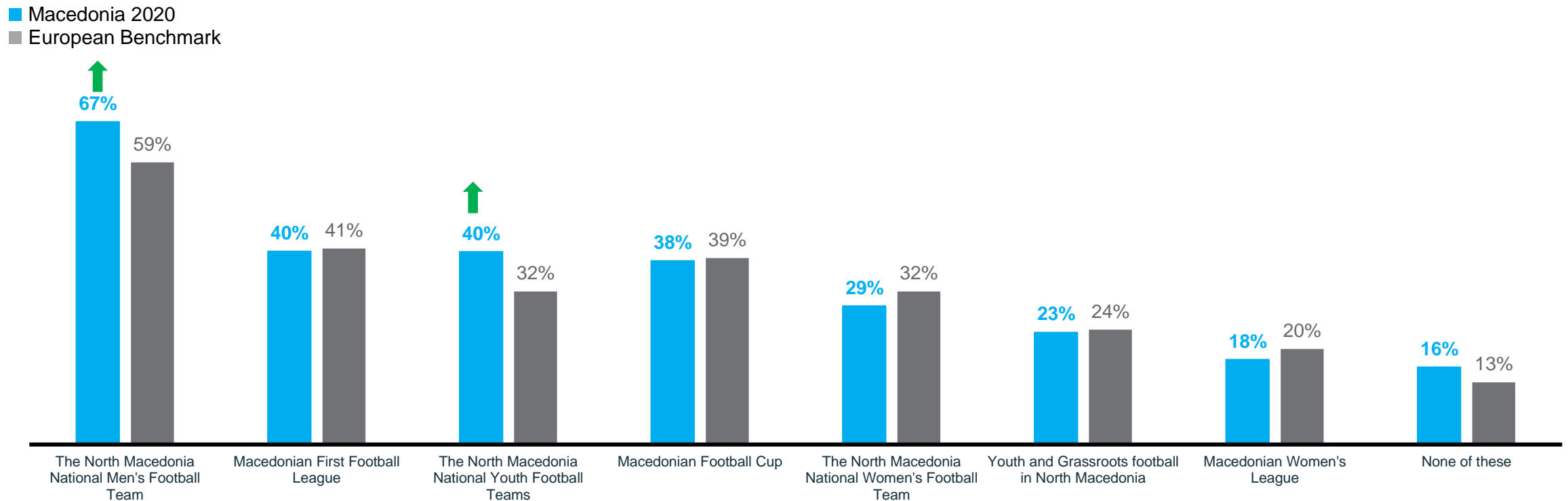
NA9. How important are each of these factors in running a successful football federation?

NA10. How do you rate the success of the Football Federation of Macedonia in each of the following?

Base: Football Fans (587)

FOOTBALL PROPERTIES' ASSOCIATION TO THE MACEDONIAN FOOTBALL FEDERATION

Around 7 in 10 (67%) are aware of the connection between the Macedonian Football Federation and the Men's National Team – this is significantly higher than the European average (59%).



NA8: Which of the following, if any, do you associate with the Macedonian Football Federation ?

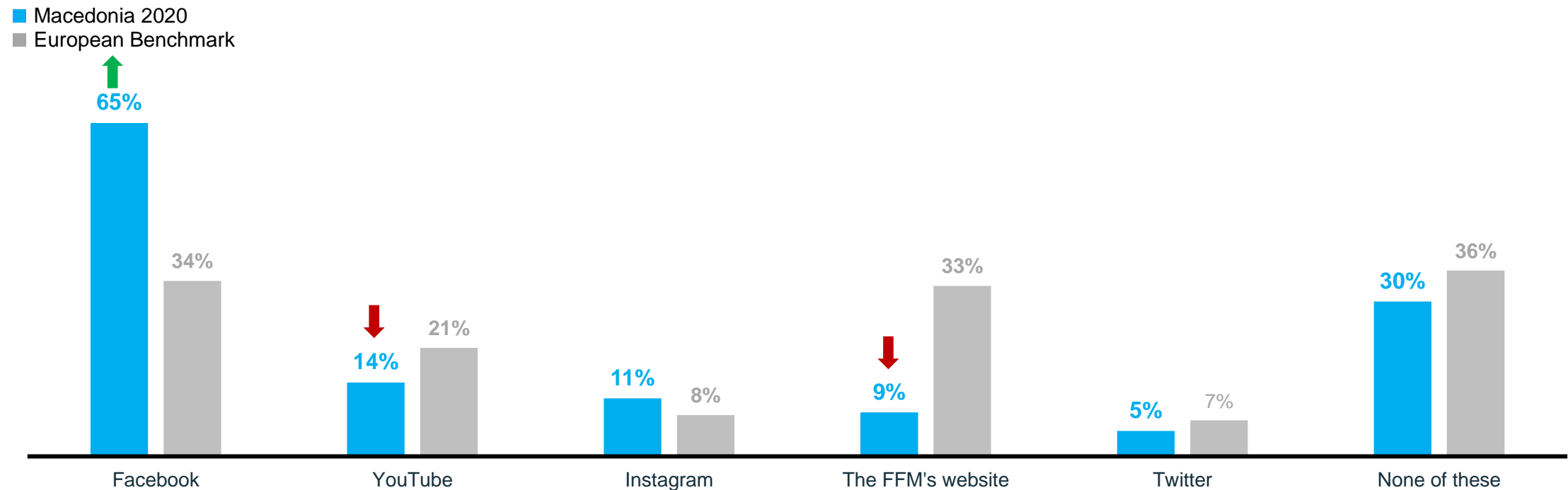
Base: All respondents 2020 (1015) Benchmark 2020 (39717)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

USAGE OF FFM'S COMMUNICATION CHANNELS (%)

AMONGST FOOTBALL FANS

For football news, the most popular FFM owned media channel is Facebook (65%) followed by YouTube (14%). The FFM's website is an underused channel amongst football fans when compared to the European benchmark (9% vs. 33%). The FFM's Instagram account performs well vs. the European benchmark (11% vs 8%).



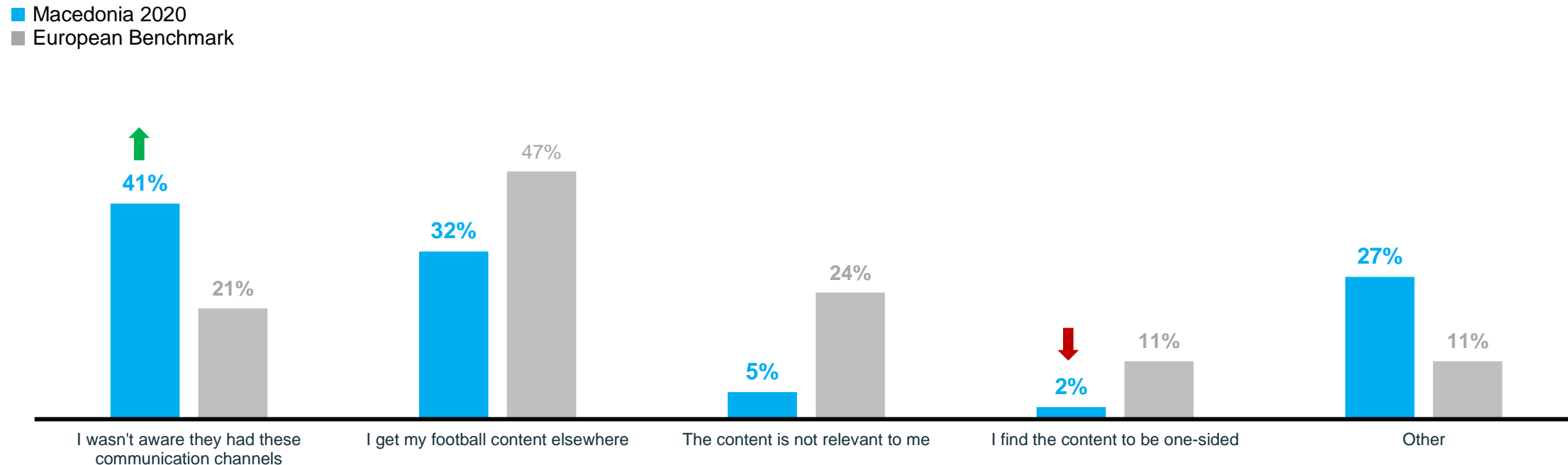
C6: Which of the National Association's communication channels do you use for football news?
Base: Football fans 2020 (587), Benchmark (9195)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

REASONS FOR NOT USING FFM COMMUNICATIONS CHANNELS

AMONGST FOOTBALL FANS WHO DO NOT USE FFM CHANNELS

The biggest reason why fans don't visit the Macedonian Football Federation's channels is that they simply weren't aware of them (41%). This lack of awareness is at significantly higher levels than the European benchmark (21%).



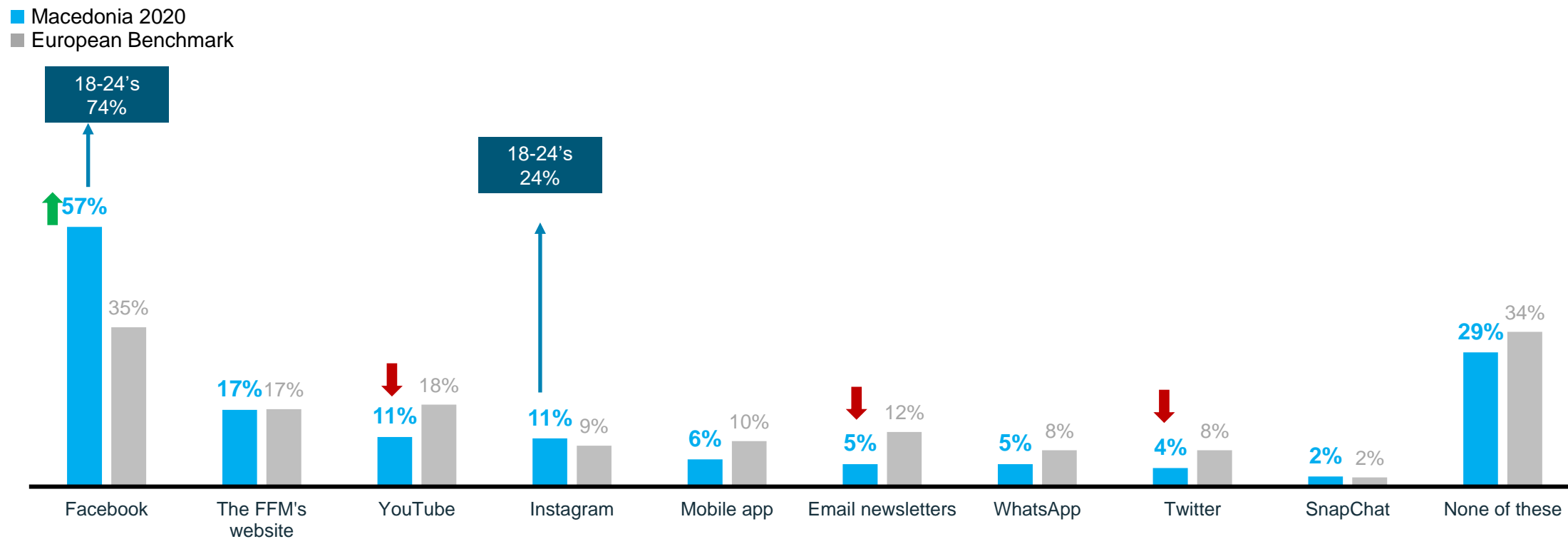
C6A: Why do you not use any of their channels?

Base: Football fans who do not use Macedonian Football Federation's channels 2020 (176), Benchmark (3353)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

PREFERRED CHANNELS TO RECEIVE NEWS FROM THE FFM AMONGST FOOTBALL FANS

Football fans would most like to receive news from the Macedonian Football Federation via Facebook (57%) and the FFM’s website (17%). This is followed by YouTube and Instagram (both 11%).



C7: How would you like to receive news from the Macedonian Football Federation ?
Base: Football fans 2020 (587), Benchmark (9195)

↑ ↓ Represents a significant increase / decrease vs. European benchmark @ 95% confidence

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7. COVID-19



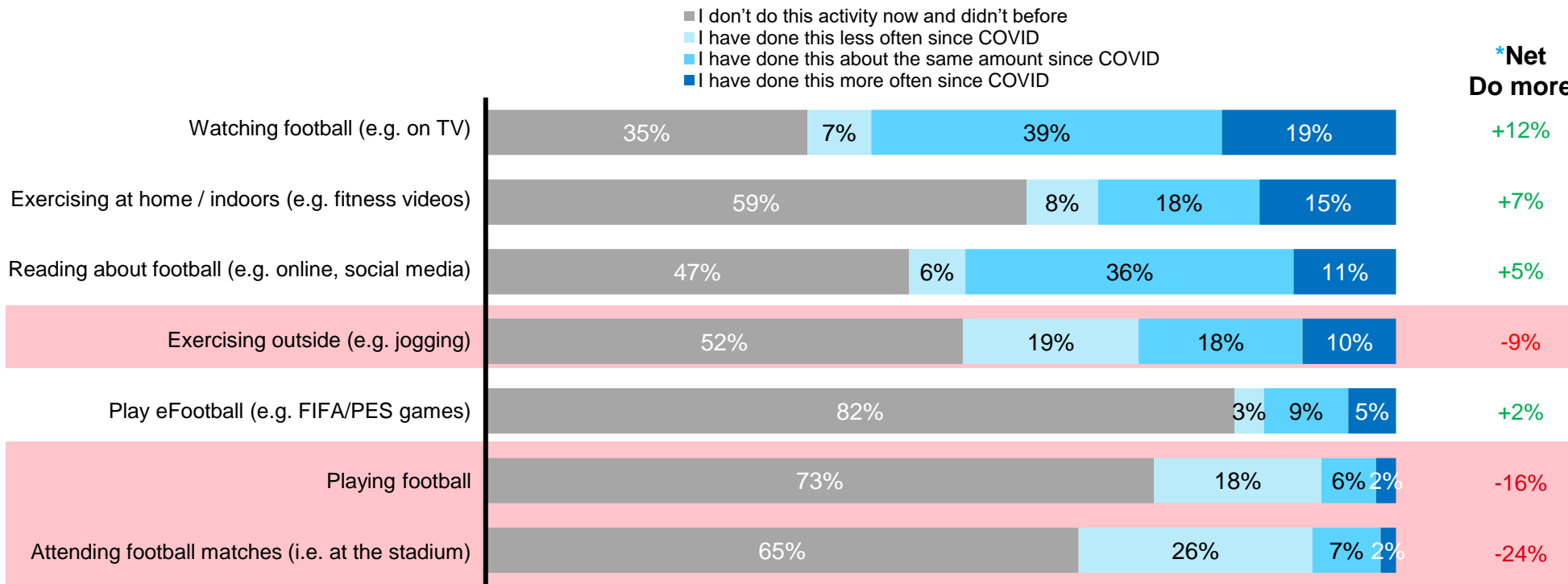
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COVID-19: IMPACT ON ACTIVITIES DONE SINCE

Macedonians are watching more football on TV (+12%) than before the pandemic and also exercising more both at home / indoors and outdoors. However, people are playing football less frequently (-16%) and attending football matches less frequently (-24%).

For each, please indicate whether the COVID-19 pandemic has seen you do this more, less or the same amount as before



V4. We're going to show you some activities. For each, please indicate whether the COVID-19 pandemic has seen you do this more, less or the same amount as before.

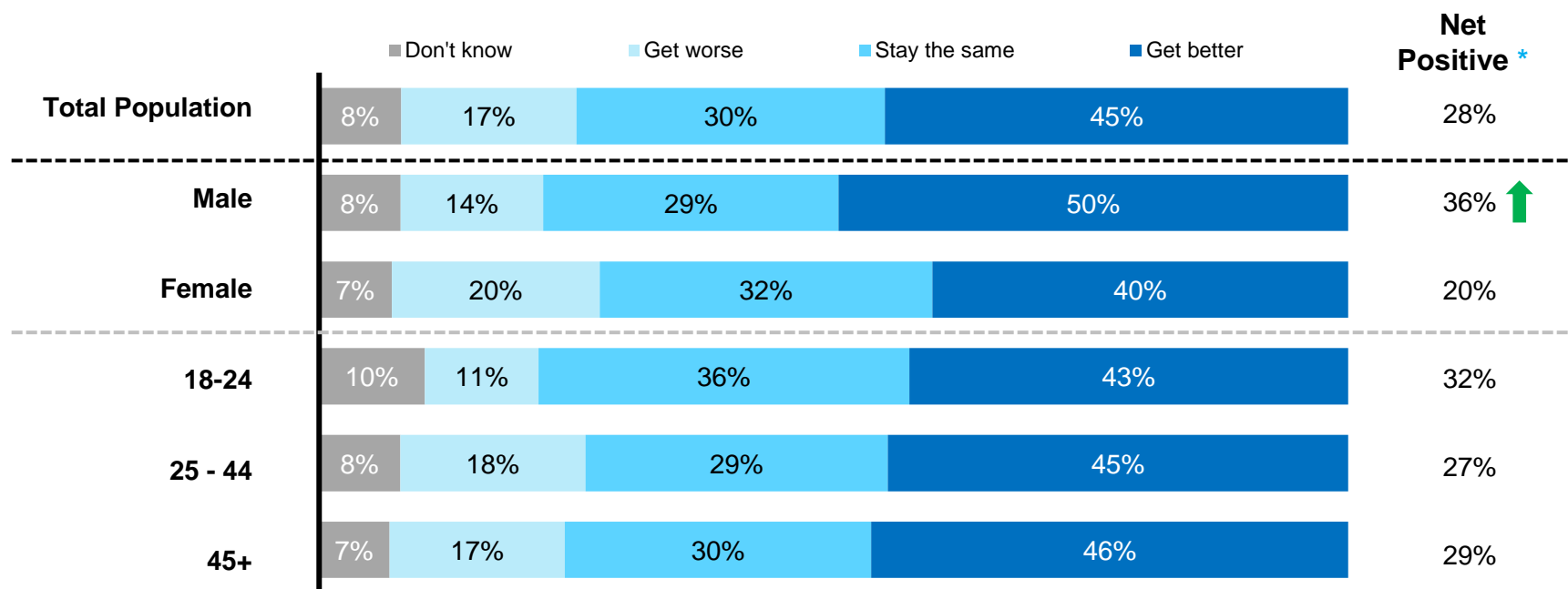
Base: All respondents (1015)

* The % of people who do this more often minus those who do this less often

COVID FUTURE OPINION

Almost half of Macedonians (45%) think that the Covid-19 situation will improve in the next 6 months. Males (50%) are more likely than females (40%) to think that things will improve.

Thinking about the overall COVID-19 pandemic in Macedonia over the next 6 months, do you think the situation will...



↑ ↓ Represents a significant increase / decrease vs. total sample @ 95% confidence

V1. Thinking about the overall COVID-19 pandemic in Macedonia over the next 6 months, do you think the situation will...

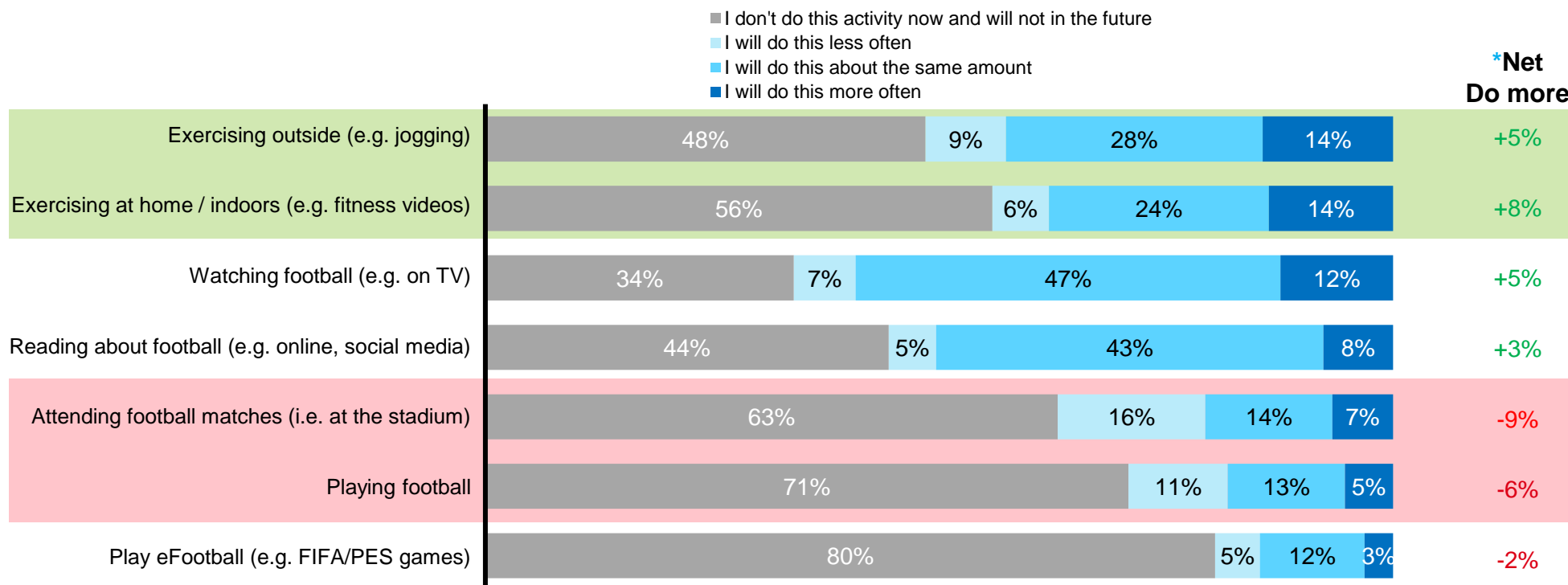
Base: All respondents (1015), Male (515), Female (500), 18-24 (136), 25-44 (456), 45+ (423)

* The % of people who think things will get better minus those who think it will get worse

COVID-19: IMPACT ON FUTURE ACTIVITIES

Even in 6 months time, people believe they will both be attending football matches less frequently (-9%) and playing less football (-6%).

As a result of the COVID-19 pandemic, do you think you will do this activity more or less in the next 6 months?



V5. As a result of the COVID-19 pandemic, do you think you will do this activity more or less in the next 6 months?
Base: All respondents (1015)

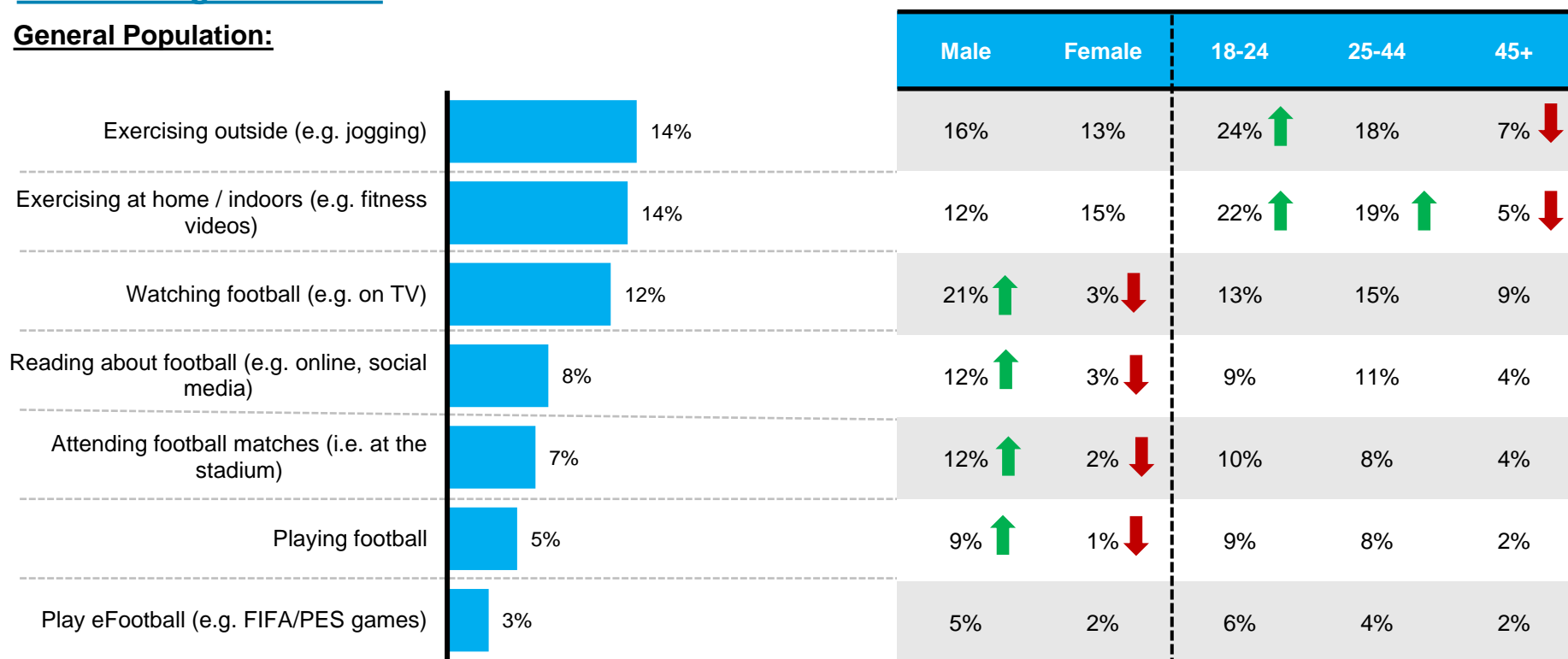
* The % of people who will do this more often minus those who do this less often

COVID-19: IMPACT ON FUTURE ACTIVITIES

The younger age groups are more likely to continue to exercise more (both indoors and outside) in the next 6 months.

Activities will be doing more often in next 6 months:

General Population:



V5. As a result of the COVID-19 pandemic, do you think you will do this activity more or less in the next 6 months?
 Base: All respondents (1015), Male (515), Female (500), 18-24 (136), 25-44 (456), 45+ (423)

Represents a significant increase / decrease vs. total sample @ 95% confidence

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EXECUTIVE SUMMARY



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SUMMARY

Football Interest

Football is #1 sport in Macedonia (58%); However, women's interest has declined (28% vs. 35%)

- The Men's National Team qualifying for UEFA EURO 2020 and the pride surrounding qualification provides an opportunity to boost overall interest even further
- The younger 18-24 audience has the highest interest in football ➔ maintain and improve by developing youth-focused strategies (e.g. be present with relevant content on relevant digital channels)
- The upcoming FFM Strategy and Women's and Girls' football strategy should address the shortfall in women's football interest

Football Participation

Football is the #2 participation sport for adults (17%) and #1 children (27%)

- Football participation has grown, but exercising has grown at a higher rate (also due to COVID-19 impact)
- In 6 month's time, people and children may be reticent to play football and to attend matches ➔ Work with government, clubs and grassroots orgs to provide necessary reassurance
- For men, focus on grassroots initiatives to keep players from moving away from football and also to boost registered participation
- Biggest barrier to female participation is the perception that football is a masculine sport (43%) ➔ Address perceptions of football being a sport for men
- Boys' participation is strong ➔ Continue to invest in the Children's Leagues project and the School Football project to build participation and to encourage club registration
- Just 5% of girls aged 6-17 currently play ➔ promote football as sport for girls to play in school as part of the Women's and Girls' football development strategy

Women's Football

3 in 4 people have no interest in women's football; #3 sport behind handball (33%) and tennis (19%)

- 41% of the adult population do not follow women's football as they believe it is a sport for men while only 9% see it as an appropriate sport for girls/women to play ➔ The Women's & Girls' development strategy should incorporate a comms campaign challenging these cultural preconceptions
- Consider setting up workshops with local grassroots clubs / educators / Macedonian Women's League clubs in order to gather the opinions of relevant stakeholders
- Also focus on addressing below average interest in women's national team

Domestic Football

Macedonian First Football League interest up by +6%; Women's League interest in line with benchmark (13%)

- Macedonian First Football League: the youngest age groups (18-24s and 25-34s) have the highest interest ➔ Build on this by developing strategies to further engage with younger football fans. Ensure presence and individual content plans on relevant digital platforms
- Leverage high interest around the Men's National Team among 18-24s by framing the domestic league as the place where the next generation of superstars are beginning their careers
- Macedonian Women's League: In order to increase the league's profile among children/families and to boost attendance ➔ Encourage links with local schools
- To build interest further among general football fans ➔ Consider feasibility studies into whether the men's clubs could also incorporate women's teams

International Football

MNT interest has increased significantly since 2016 (from 43% to 50%)

- MNT interest could increase further with a comms campaign building up to the UEFA EURO 2020. Promotional activity around the national team should focus on success, excitement and pride
- After UEFA EURO 2020, FFM should focus on legacy initiatives that give all national teams the best chance of qualifying for other major tournaments in the future ➔ Specific areas of focus should be the training of high quality coaches and referees, improving football infrastructure and developing youth grassroots football
- A lack of coverage is the 2nd biggest reason for a lack of interest in the Women's Team (28%) and the biggest reason for the Youth Teams (32%) ➔ Increase the volume and accessibility of content for both teams. Use the most relevant of FFM's own digital channels
- Increase interest in the youth national teams by showing path of MNT players who moved from the youth team to reach UEFA EURO 2020

FFM Image and Communications

71% believe that FFM has a positive overall image (sig increase vs. 2016: 52%)

- Greater knowledge of the FFM's role leads to a significantly improved FFM perception ➔ The challenge is to communicate the FFM's role and activities more widely
- Develop campaigns showcasing real initiatives achieving pre-defined and measurable goals related to the training of high quality coaches and referees and developing youth and grassroots programmes
- Increasing engagement and participation in women's football is seen as the lowest priority by the general population ➔ The Women's and Girls' football development strategy should address this issue
- FFM should develop a communications strategy to increase awareness of organisational activity

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DISCUSSION / NEXT STEPS



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THANK YOU



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