

Survey of Welsh Rugby Support

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1 Background

The University of Glamorgan² and The Prospectory³ are researching the psychology of top tier Welsh rugby support. This research has so far consisted of two studies:

1. A qualitative study based on 7 discussion groups conducted at two of the Premier Division clubs in September 2002 and involving 45 supporters.
2. A quantitative survey based on questionnaires distributed at 9 Premier Division home games in October 2002.

A report of the first study is now available, and this is a preliminary report of the second. There is a great deal of data from the survey that has yet to be analysed, and this report will report only the most significant results aggregated across all the clubs. More detailed analyses, including analysis of co-variance and correlation of different data items, will follow in the New Year. Detailed analysis for individual clubs, including significant variations between the attitudes of a club's supporters compared with the aggregate, will be done on an ad hoc basis at the request of the clubs concerned.

2 The Survey

Appendix 1 consists of the questionnaire which was distributed at each of the 9 premier division clubs at one of the home games in October 2002. The games were:

- Llanelli vs Swansea
- Ebbw Vale vs Edinburgh
- Newport vs Scottish Borders
- Bridgend vs Leinster
- Neath vs Munster

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³ a small research consultancy specialising in the psychology of 'experiential' consumer products.

- Cardiff vs Bridgend
- Swansea vs Ebbw Vale
- Caerphilly vs Ulster
- Pontypridd vs Cardiff

We distributed 500 surveys at each game to home supporters in the hope of achieving a 15% to 20% return. Of approximately 4500 questionnaires distributed, over 1000 were returned and 942 usable. We exceeded our 20% target, which was pleasing. It would not have been possible without the support of the clubs, for which we are most grateful.

The questionnaire, and this report, is divided into sections governing:

- a) Basic demographics and supporter history.
- b) Questions about how supporters support their club of choice.
- c) Questions about why supporters support the club they do.
- d) A survey of supporters' attitudes to other premier ship clubs.
- e) A survey of loyalty to club versus loyalty to Wales and/or other rugby sides.
- f) A survey of the factors affecting attendance at live matches.
- g) A measurement of supporter "commitment" modelled on similar measures developed and tested in the United States, which may be usable for correlative analysis and breakdown of supporter groups.

The remainder of this preliminary report will provide highlights of the results.

3 Basic Demographics

We asked for the subjects' age, gender, occupation, residence, origin (where you "come from"), and how long people had been rugby supporters. We established which premier team (if any) each subject considered his or her own, how long they had supported that particular team, and whether they had a season ticket (and if so for how long). Much of this data, especially the geographic data, has yet to be analysed, but here are the highlights.

3.1 Age

Figure 1 shows the profile of age and gender in our sample, broken down into ranges. 80% of the sample was male. The youngest respondent was 8 years old, and the oldest 86. The distribution looks to be "classic", with an average age of 46 overall.

Age and gender of the sample

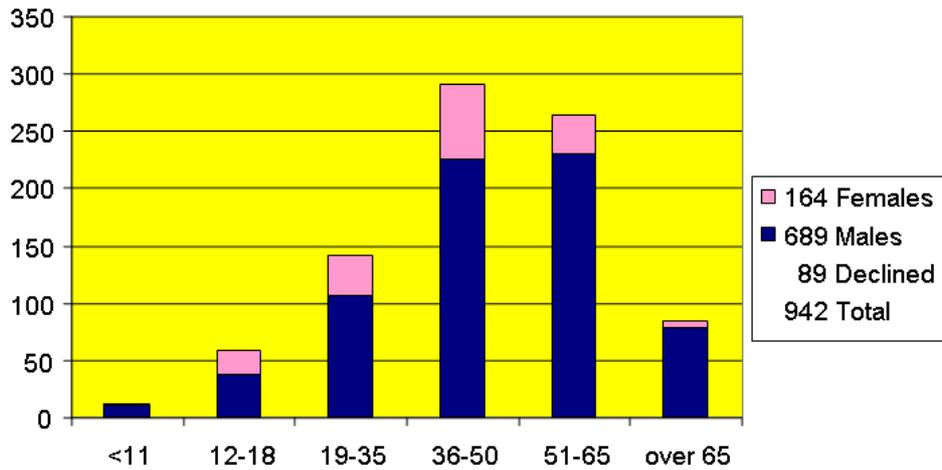


Figure 1: Survey age and gender distribution

89 people declined to provide either gender, age, or both, and have been omitted from the graph.

3.2 Occupation.

Our survey allowed “free form” entry of occupation, so full analysis of this may take some time. However, the top 10 *reported* occupations appear to be:

1. retired	207
2. student	88
3. teacher/lecturer	58
4. civil servant	40
5. local govt officer	21
6. engineer	18
7. factory worker	17
8. manager	14
9. Police/Ambulance/Fire	11
10. company director	9

This amounts to 483, over half of the total of 942 responses. 24 of the subjects declined to provide this information.

3.3 Residence.

Quick analysis of the postcode information we asked for shows that 66% of the supporters surveyed live in the same post code sector as the ground of the club they support. Another 26%

come from a Welsh postal region, and the remaining 7% from non-Welsh postcodes or declined to provide this information.

3.4 Support Period

The people surveyed had in some cases been rugby supporters all their lives. The longest period of support for rugby was 80 years, with an average across the sample of 32. The longest term of support for a given club was 74 years with an average of 24. 675 of those polled (72%) held season tickets, and one had done so for 70 years (he claimed!) but the average across the sample of season ticket holders was 13 years.

It is worth noting, therefore, that the survey subjects probably put around £100,000 into the premier division of the game every year, and we surveyed about 100 people from each club. Most large premier division clubs have thousands of season ticket holders. Supporters of the kind we surveyed are therefore a significant source of income for the professional game. Demand for the club game as measured by crowd sizes has dropped over the last 30 years⁴, and getting crowds back to the level enjoyed in the 1970's would greatly ease the financial pressure on the clubs and enable them to provide a better product.

The Union may be hoping that the revenue generated from these supporters would transfer in whole or in part to a provincial structure. For this to happen in the short term, it may be necessary to marginalise traditional clubs as significant commercial businesses. Clearly, the prices of tickets for semi-professional clubs confined to national league games will be lower, but the disposable income of the supporters still may not allow them to support both a semi-professional club and a provincial club playing the 12 home games a season necessary for it to be competitive. The Welsh national team may still manage to sell out for top level internationals, but most of the supporters we surveyed will have little chance of watching Wales play at the Millennium Stadium. The money they directly put into rugby currently goes to their club.

3.5 Demographic Summary.

The demographic data needs to be studied in more detail, but the first impression is of a fairly mature population with a very long history of loyal game, and club, support. This population as a whole is predominantly male, peaking in the 36-50 and 51-65 age ranges.

4 How Fans Show their Support.

We asked about the various ways fans “support” their team. We asked how often they:

- a) Checked results
- b) Talked about the team
- c) Read press reports about them
- d) Visited web sites
- e) Went to home games
- f) Went to away games in Wales

⁴ But 30 years ago there was very little live club rugby on TV in Wales

- g) Went to foreign away games
- h) Watched the team on TV
- i) Listened to radio commentaries and
- j) Video's TV games for later enjoyment

All supporters checked results, talked about their teams, read the press and went to home games. A large number said they went to some away games in Wales. Very few said they went to foreign away games, but we didn't make explicit whether games in England or Scotland would count as "foreign". Figure 2 shows a sample of the responses.

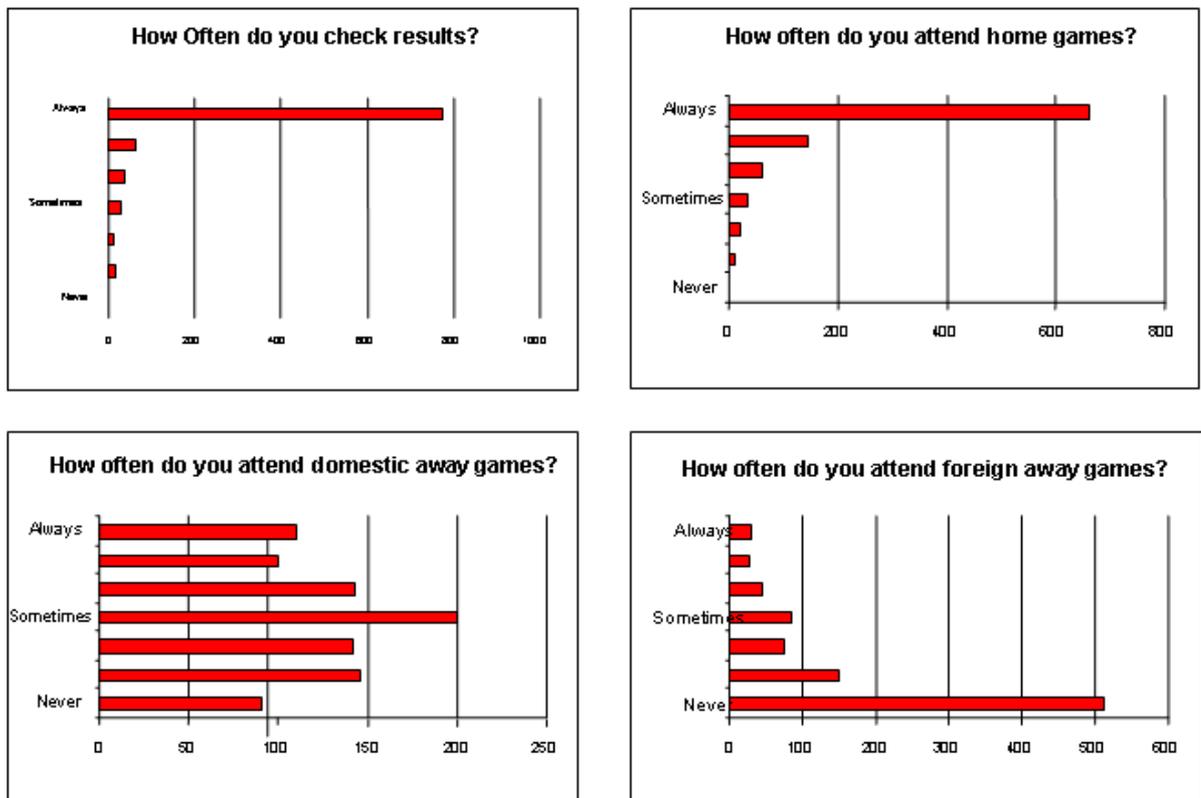


Figure 2: How fans support their clubs

These results are what you would expect. Only about 100 people in our sample said they "always" went to domestic away games, but 200 said they sometimes did. As we shall see, some games are more valuable to supporters than others.

5 The Origins of Support.

Supporters cannot always articulate why they support the team they do. Given a selection of possible reasons, and asked how important they were, responses did provide a pattern of sorts, but we cannot be certain we asked about all the *real* reasons.

Most supporters claimed that the team’s playing style was the most important factor in retaining their support. Almost as important as the playing style of the club is that the supporter lives in or comes from the area represented by it, closely followed by the “family atmosphere” that the club engenders. This latter feeling is by no means confined to clubs that make a special effort to attract families, and as the discussion group research showed, supporters are inclined to find their own ground or club “homely”, whereas they are anxious about going to other grounds. This may be particularly important when considering how to attract supporters of a team that has no home ground, as the Scottish regional sides have found to their cost. Figure 3 is a sample of the responses:

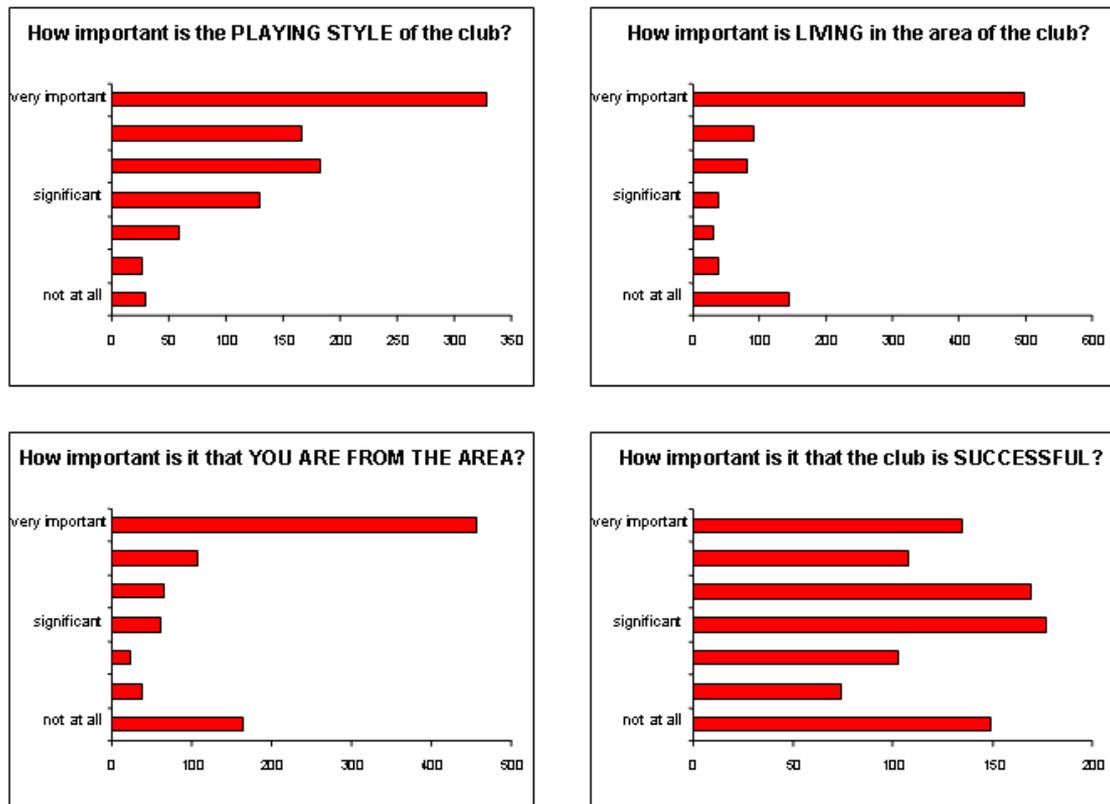


Figure 3: Origins of support for a club.

Interestingly, whether or not a team is successful is, on average, just short of “significant” taken across all supporters surveyed. This may sound surprising but a dedicated supporter is *supposed* to support his club through thick and thin. We expect some variation in this result between the clubs, and the response to this question was the most balanced when totalled across all the clubs. Our “zero hypothesis” is that the supporters of the more successful clubs will regard it as more important for their side to be successful than the supporters of less successful ones. Any departure from that would be of interest, and we have the data.

The significance of these results for the future structure of the Welsh game is that a distinct playing style, and the fact that the side represents the supporter’s community are important defining characteristics of what it is that the supporter supports. For the supporters we polled, who admittedly had a long history of support for their club, success on the field was no longer essential.

Any provincial team hoping to attract this support would have to be seen to properly represent the area, play in the same stadium, and evolve a characteristic playing style. On the performance front, a provincial team may not be granted the same leeway as a club that has represented the area for 100 years. If one of the aims of provinces is to improve cross-border success rates then success may be their initial defining characteristic. It would be problematic for the provincial concept if the sides were not significantly more successful in cross-border competition than the ones they replaced, and quickly. The Irish and Scottish Unions were fortunate in never having entered club sides in cross border competition, so Scottish fans have nothing to compare the early lack of success of Glasgow and Edinburgh with.

6 Club Rivalry

We asked supporters what they thought about other clubs in the premier division. Rugby (and team sport in general) is different from other commercial products where, by and large, the “best” product will *tend* to capture the whole of its available market⁵. What makes sporting products different is that the value of the product is *dependent* on there being several viable products in the market; even though most consumers appear to buy only one of them.

I say “appear” because buying choice is complicated. Pontypridd supporters “buy” the product offered by the Pontypridd club, but more of them buy that product when it is playing Cardiff than when it is playing Ebbw Vale. The bottom line is that, as a *commercial* product, supporters’ attitudes to different clubs and playing field opposition is a critical factor in overall product value. And as more detailed research – including the more qualitative research provided by the discussion groups – will show, supporters identify with their own club partly by contrasting it with others. This report will not go into great detail on this point, but early analysis suggests it is a critical factor in the financial viability of the commercial game in Wales today.

To get a feel for this, we asked the supporters:

1. Which other Welsh premier club(s) did they especially like to see beaten?
2. Which other club(s) did they especially like to do well (for example, would support, except when playing their own club)?
3. Which other club did they consider most like their own?
4. Which other club did they consider least like their own?
5. Which other club did they most look forward to playing?

Questions like these were intended to find out where the rivalry is at its most and least intense and where supporter attitudes may have a bearing on their commercial behaviour. Every marketing director knows that inter-club rivalry drives commercial team sport: the market for a “good game of rugby”, where the crowd appreciates good play by both sides, is relatively small, and dare one say over-represented at the top echelons of the game’s administration and in the media. We certainly didn’t find many supporters with this outlook at the games we sampled. If we (re)design the top level game for this small market, the technical standard of the rugby would

⁵ Fortunately, consumer needs are diverse, and most products are compromises, so in practice what is best for one consumer isn’t best for another.

(need to) improve, but local demand for the games themselves would be uncertain. This kind of product may, in fact, be better suited to a TV audience, which could be the intention.

Club rivalry can be eliminated as a factor in the top level of the game only by removing the things that fans identify with: stable teams, stable management, fixed grounds, and distinct playing styles. We would expect this to result, at least initially, in a loss of the (commercial) custom of those supporters for whom such things are important. These factors may be relatively unimportant to the Union, who may simply want to improve the fortunes of the national team and ensure the continued health of the grass roots. This research does not pretend to point the way to what is “right” for Welsh rugby – simply to shed light on the origins, nature, and extent of support for the top level commercial game today, so that any restructuring proposal would be better informed.

So, what *does* it look like today?

6.1 The Villains of the Piece.

Welsh rugby is not alone in having committed non-supporters of teams. In soccer, there is a sizeable group who support whoever is playing Manchester United. This makes Manchester United the most valuable club in the English premier league, and from a commercial standpoint, Manchester United, and indeed the other clubs in that league, should do all they can to bolster this position.

When we asked the supporters which side they particularly liked to see beaten, the answers varied but there was a pattern, as Figure 4 shows:

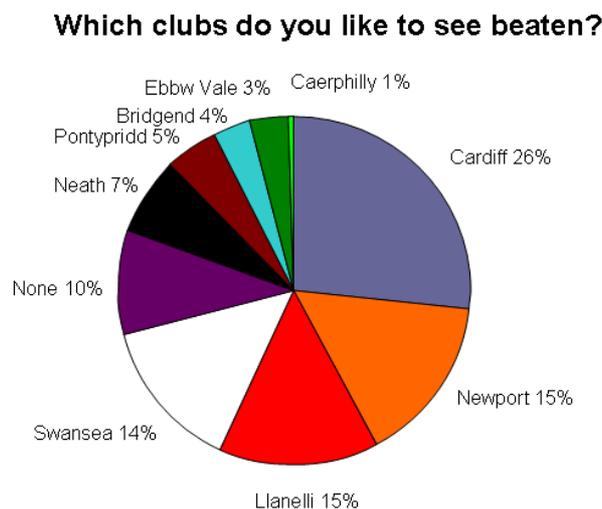


Figure 4: Clubs that other clubs’ supporters like to see beaten

Not surprisingly, supporters of other clubs like to see the traditional “Big 4” get their come-uppance. Remember, though, that this chart shows a sizeable vote from supporters of those Big 4 clubs, which probably inflicts a “double whammy” on any member of the Big 4. A commendable 10% of those surveyed either did not think in this way about any other club, or could not be persuaded to admit it!

In a league where clubs have different owners, histories, management and playing style, there will be things to admire and dislike about different clubs. People identify themselves partly by the groups they choose to associate with and by the things they choose *not* to associate with. In club support, small apparent differences between clubs tend to be magnified to reinforce the identity of each set of fans with the club of their choice.

If we accept that the attitudes portrayed in Figure 4 contribute to the value of the game for some paying supporters, any future professional game would do well to recreate it for internal competition between the sides. This would be more challenging if all the clubs had the same owner, the same playing style, and a set of players liable to change at the behest of national team management. It may be difficult for a West Wales to sustain a rivalry with, say, South Glamorgan based solely on where they happen to play! The stereotypes that supporters create about other clubs, their players and their supporters are not factually accurate, but they must have some credible foundation in fact if they are to fuel rivalry.

6.2 Second Order Support.

We asked the supporters the converse question of which sides they liked to see do well. This would indicate, perhaps, a potential for transferring their support to another club in the event that the supporters own club be excluded from the future top level structure of the game. It might also give us a pointer to potential alliances between clubs. In Figure 5 we simply show the “gross” result across all the clubs, rather than the more interesting club by club results, which will have to wait for more detailed analysis. Figure 5 can therefore only offer the results of a popularity contest, although that, as we shall see, may have commercial ramifications.

Which other clubs do you like to see do well?

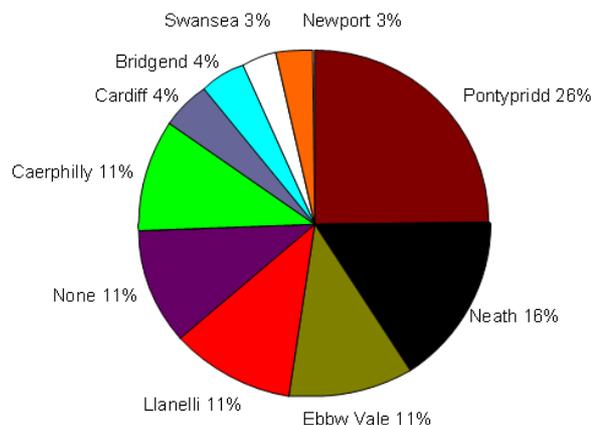


Figure 5: Latent Support for other clubs.

Figure 5 is almost, but not quite, the expected inverse of Figure 4. The only clubs to score significantly on both are Neath and Llanelli, and as we shall see when we do the detailed club-by-club analysis, Figure 5 suffers from being an amalgam. Broadly speaking, it looks as though the historic Big 4 are the sides that other supporters like to see beaten, but there is a sizeable

population who like to see Llanelli do well. This may be because of their recent high profile in the European Cup, or perhaps because they are the smallest of the Big 4.

6.3 Kindred Clubs.

So we asked that question explicitly in the questionnaire: which club do you feel is most like yours? Once again, the results are much more interesting and significant when broken down by club, but in this preliminary report we're confining ourselves to results across all the supporters. So, bearing mind that we polled roughly the same number of supporters at each club, Figure 6 shows the clubs that supporters felt were most like their own:

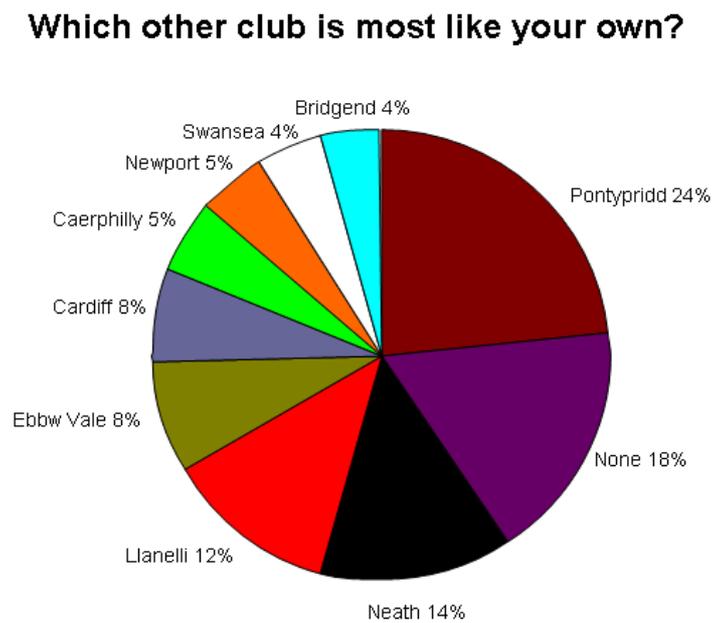


Figure 6: Kindred Clubs

A sizeable 18% of supporters considered their club to be unique, but nearly a quarter of those polled felt that Pontypridd was the club most like theirs, and that figure does not include Pontypridd supporters!

Figure 6 is similar to Figure 5, suggesting that you do indeed tend to root for clubs that are like yours. Once again, the Big 4 (with the possible exception of Llanelli) are generally not considered to be like other clubs, although this figure is surprising when you consider that the supporters of the Big 4 themselves might have been expected to vote for each other, at least!

With regard to the future structure of the game in Wales, one might hypothesise that two clubs whose supporters each regarded the other as most similar would, perhaps, be more inclined to join forces than clubs whose supporters regarded the other as alien. Practically speaking, of course, it is *geography* that puts the greatest constraint on potential mergers. This data, especially when broken down by club, may be a useful pointer to difficulties in marketing a side whose support is expected to come from the supporters of traditional clubs.

6.4 Alien Clubs

For completeness, and to tax the imagination of the subjects, we asked them which club they considered to be *least* like their own. The result is shown in Figure 7, and almost complements the result in Figure 6, but not quite.

Which club do you feel is most different from yours?

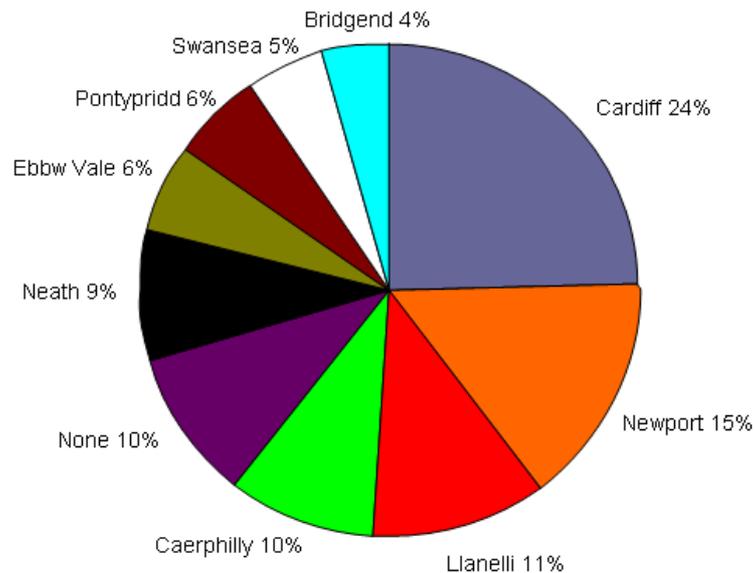


Figure 7: Alien Clubs

Here, as you'd expect, the Big 4, represented by Cardiff Newport and to a lesser extent Llanelli loom large. Surprisingly, Swansea did not get as many votes as its membership of the Big 4 would normally have commanded. Perhaps this reflects Swansea's recent problems, which may have eroded some of the "big club" aura that once surrounded it. Caerphilly, as currently the bottom team in the Premier division, attracts a significant vote – presumably from supporters of Big 4 clubs. A more detailed club by club breakdown will confirm this.

6.5 Big Draws.

The previous 4 questions asked about attitudes that have no obvious behavioural consequence, although they will provide much food for more detailed research later in the New Year. Of more immediate relevance to club marketing is the answer to the question: Which club do you most look forward to playing? The answer, totalled across all the clubs, is in Figure 8:

Which team do you most look forward to playing?

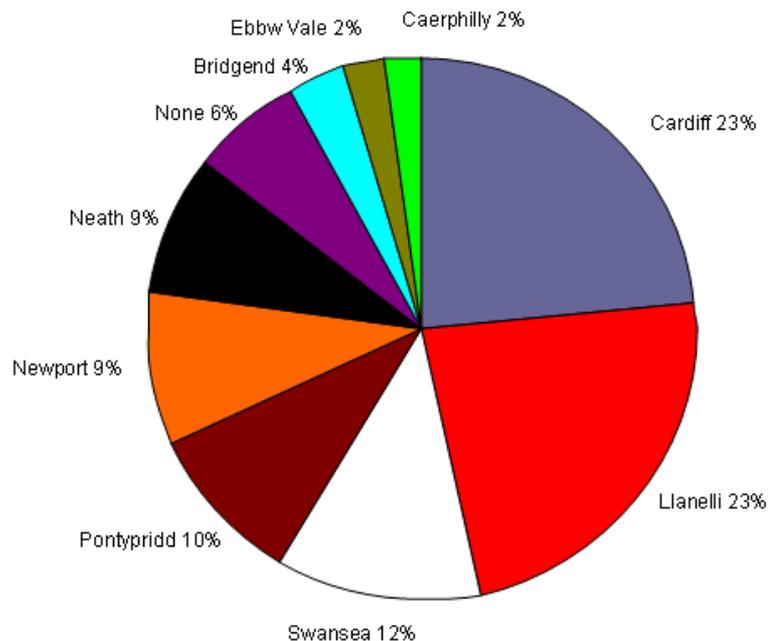


Figure 8: The Big Draws.

This result will not surprise many commercial directors. Cardiff and Llanelli are by far the biggest draws, although unlike some of the other results reported here, the “good” results for Cardiff and Llanelli reflect a measure of mutual attraction. Any way you look at it, though, it is clear that the club that most people like to see beaten, *and* regard as most alien, is also the one they particularly like to play. This is not surprising, but it is significant for the financial health of the professional game. The Union would need to think carefully when restructuring the Welsh game about how these big draws come about, and whether they need to be recreated for internal competitions involving sides from the new top tier.

It can be argued that a setup with fewer sides of higher quality should produce a more balanced profile of anticipation, with larger crowds coming to see more games of better rugby. But if all you want to watch is better rugby, you can see it on Super 12 and the Zurich Premiership on Sky. What many of today’s supporters want is the chance to beat Cardiff, or if you’re a Cardiff supporter, to beat Llanelli. Should a future structure try to recreate this kind of ambition, and if so, how? The attitudes depicted in Figures 4 – 8 are the result of very long history.

Because this question is the only one with direct commercial ramification, we decided to do some early club-by-club analysis. Figure 9 shows the results for the *games* (i.e. the club pairs) that generated the most combined votes from this sample. Figure 9 is therefore a league table of derby matches in the current Welsh premier division according to our subjects:

Most Popular Matches

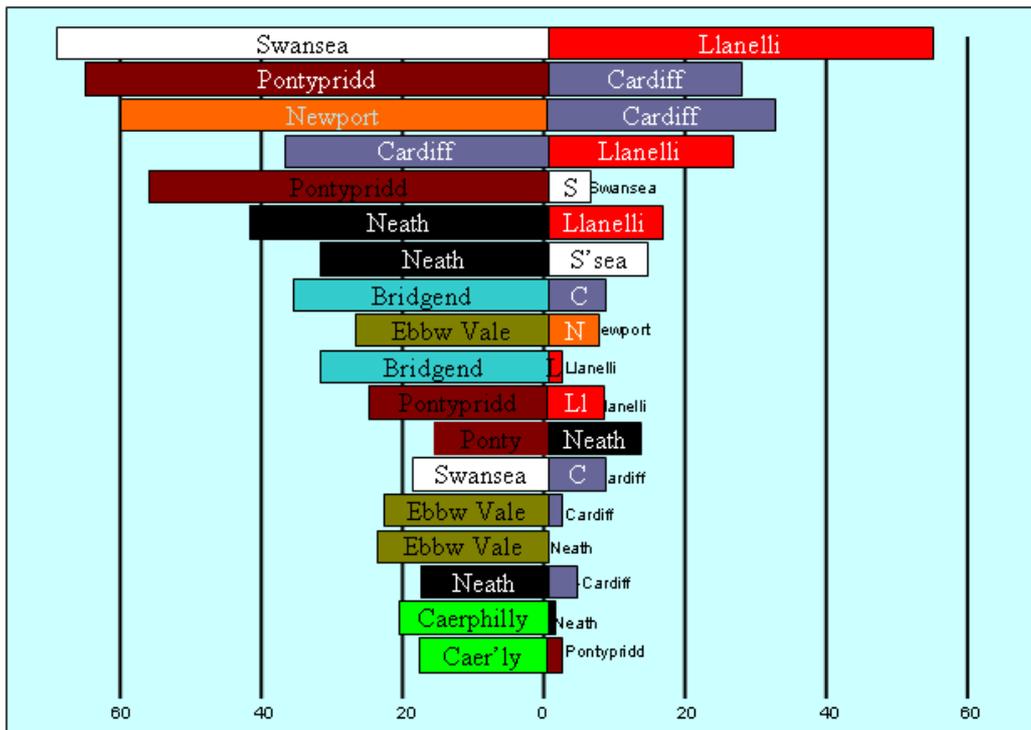


Figure 9: The Derby Match Table

Figure 9 is not a complete list of matches (for that, see Table 10), but every club is shown at least once. The matches are ordered by the percentage of “votes” recorded in answer to the question “which club do you most look forward to playing”. Thus the top line shows the votes of Swansea supporters for Llanelli added to the votes of the Llanelli supporters for Swansea.

The left hand club in each case is the club whose supporters contributed proportionally more votes for this game – so for example (see Table 10) slightly more Swansea supporters (69%) voted for Llanelli than vice versa(54%). The Llanelli vote was split, with 26% voting for Cardiff as the match they most looked forward to playing. Table 10 provides a summary of the pair-wise club “draw” figures, for interest.

Figure 9 and Table 10 record the anticipation levels for each of the games, but whether this translates to actual attendance at a match depends on a number of other factors, some of which we tried to survey. The results are reported in Section 8. Clearly some of the games are not equally valued by both sets of supporters, and whether or not a large combined vote means a large crowd depends on whether the match is at home or away to the set of fans wanting it most.

A restructuring of the professional game would, hopefully, result in greater balance in anticipation between the supporters of the two sides when top level Welsh sides play each other competitively in the new structure. This kind of balance can be seen today between clubs at the top and the bottom of the league.

	Bridgend	Caerphilly	Cardiff	Ebbw Vale	Llanelli	Neath	Newport	Pontypridd	Swansea
Bridgend		2	36	4	32	4	5	12	7
Caerphilly	2		16	14	12	21	10	18	0
Cardiff	8	2		2	37	4	32	27	8
Ebbw Vale	4	5	23		14	24	27	15	4
Llanelli	2	2	26	0		16	2	8	54
Neath	5	1	18	0	42		6	13	32
Newport	7	4	60	7	14	2		6	8
Pontypridd	7	2	65	1	25	16	5		56
Swansea	1	2	19	2	69	14	4	6	

Table 10: Club Draws (figures are percentages)

7 Loyalty to Wales versus Club.

Club v Country conflicts are not confined to club and national team managers, they also occur in the support base. Most supporters we polled would count themselves supporters of Wales. We asked them to order their loyalties between:

1. Their club
2. Wales
3. Another club
4. The Lions
5. Another national team

Here we will only report on responses that placed club and Wales in the first two positions. The respondents did not follow our ambiguous instruction to place their loyalties in order, so we have been obliged to count the supporters who put club and country on equal footing separately.

The results are interesting. The average figure across all the supporters polled shows that over 60% of the supporters put their club first, 27% put Wales first, and 13% put them equal. This result may be considered controversial on the grounds that the poll was conducted during a period when club games were at the forefront of the supporters' agenda. Nevertheless, the margin is a large one, and begs the question of whether it varies from club to club. To try to satisfy that curiosity, Figure 11 shows the results for the supporters of each of the 9 clubs.

Loyalty Priorities of Different Clubs' Supporters

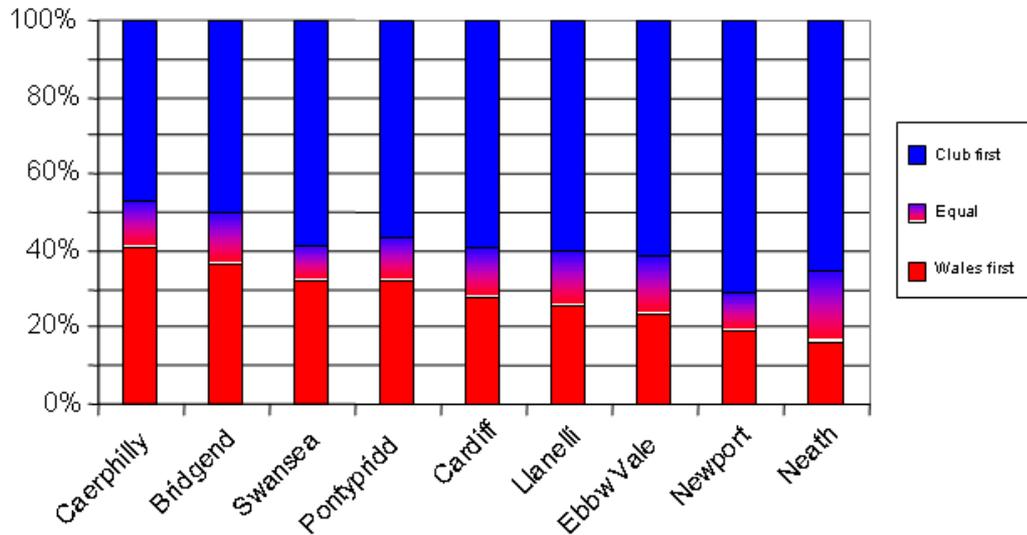


Figure 11: Club vs Country

The figures have been drawn as percentages for clarity. The clubs are ordered by descending order of “Wales first” loyalty. So in this survey, a higher proportion of Caerphilly’s supporters – 40% - put Wales first in their loyalties, but even this represents a minority – most Caerphilly supporters place their club on a par with or higher than Wales. Less than a fifth of Neath’s supporters put Wales first.

This suggests that it will not be simple to persuade many of *this* set of supporters to sacrifice their club loyalty in the interests of Wales. If the ambitions of top level clubs to compete in cross-border competition have to be denied, then it might be better to avoid putting supporters’ relative loyalty to the test by competing directly for their support. Unfortunately, we did not ask supporters specifically about cross-border competition so we aren’t able to speculate whether this pattern of relative loyalty would be affected by the absence of any cross-border competition between clubs in a future restructuring of the game. But this is what any restructuring plan must rely on if it needs the continued support of the existing supporters of professional clubs.

Many English club supporters consider winning the Heineken Cup more important than England winning the 6N or even the World Cup. It is not difficult to see why this would be – a Leicester supporter has more reason to feel elated if Leicester are European champions than if England win the 6N, because he would be more closely and exclusively identified with that success. There is no reason to suppose that Welsh club supporters feel any different. If the top level game in Wales is restructured for cross-border competition, then new loyalty patterns may emerge where supporters feel greater loyalty to their province than they do to Wales.

The reasons for this are clear: for most supporters we interviewed, international rugby is a TV phenomenon made more compelling by the presence of players from their club. Most never get the chance to see a top-flight international live because of the way tickets are marketed, priced and distributed. The highest level of competition that most supporters can aspire to is therefore cross-border club competition. The numbers of supporters who are prepared to travel to attend knockout stage matches in the Heineken cup is staggering. The matches are more accessible and engaging for committed supporters, as they build on the strong social bonds that develop between supporters of a club.

All this poses a challenge for a provincial structure to recreate, at least initially. Munster's away support is legendary, but there has arguably always been a provincial ethos in Ireland for Munster to build on. The away support (and even the home support) for the Scottish regional sides is perhaps more indicative of the challenge that a new structure in Wales might expect, especially if it has to compete with a vibrant semi-professional level. And the Scottish Union did not have to deny existing clubs cross-border competition to put its regional structure in place.

8 Match Day Attendance.

Since this round of our research was focussed on supporters who go to watch live rugby, we surveyed the factors that affect their decision to attend or not. There are many firmly held opinions about why crowd sizes are falling, and so we decided to test as many as we could. We asked subjects to rate the importance of 15 factors that might affect their decision to attend a game. As with the other survey of the nature and origin of support, subjects were asked to rate the factors on a 7 point scale from "not important at all" to "very important". The factors included were:

1. The time and day of the match
2. The weather
3. Whether the match was on TV
4. The quality of the opposition – how technically entertaining
5. The fact that international players would be playing
6. The strength of the opposition – how hard they would be to beat
7. The significance of the result to the rest of the season
8. The recent performance of their own team
9. The likelihood of their team pulling off a big win
10. The travelling distance to the game
11. The off-field entertainment
12. Whether their friends would be going
13. The price of the tickets
14. The fact that the game was against a traditional rival
15. The likelihood that it would be a close game

The results were disappointing as a source of behavioural data. Although it is well known that wet weekday games, especially if televised, reduce crowd sizes, our supporters did not admit this. But this is an *attitude* rather than a factual survey. The subjects are telling us how they feel they

ought to be, rather than how they actually are. And we should not forget that two thirds of the subjects in this survey are season ticket holders, some of them long term. They therefore represent the outlook of the committed rugby supporters – the very ones who would be in the crowd even when it is small.

It requires more detailed study of this set of results to say whether we have identified the critical factors governing match attendance. Most supporters projected themselves as loyal and committed, regarding almost all the factors *we* suggested as having little or no bearing on their decision to attend and back the club. They used this part of the survey to air some common grievances about factors that they consider to be outside the control of the clubs, but detrimental to their enjoyment of the game.

The 4 results shown in Figure 12 are those that scored the highest in overall significance, and interestingly, only the first two rated above “significant” on average – i.e. the halfway point on the scale. The modal response (the response ticked most often) was “not important at all” except for the first question – time and day of match. We hope that the results for individual clubs will show more interesting variety of response, and yield more information.

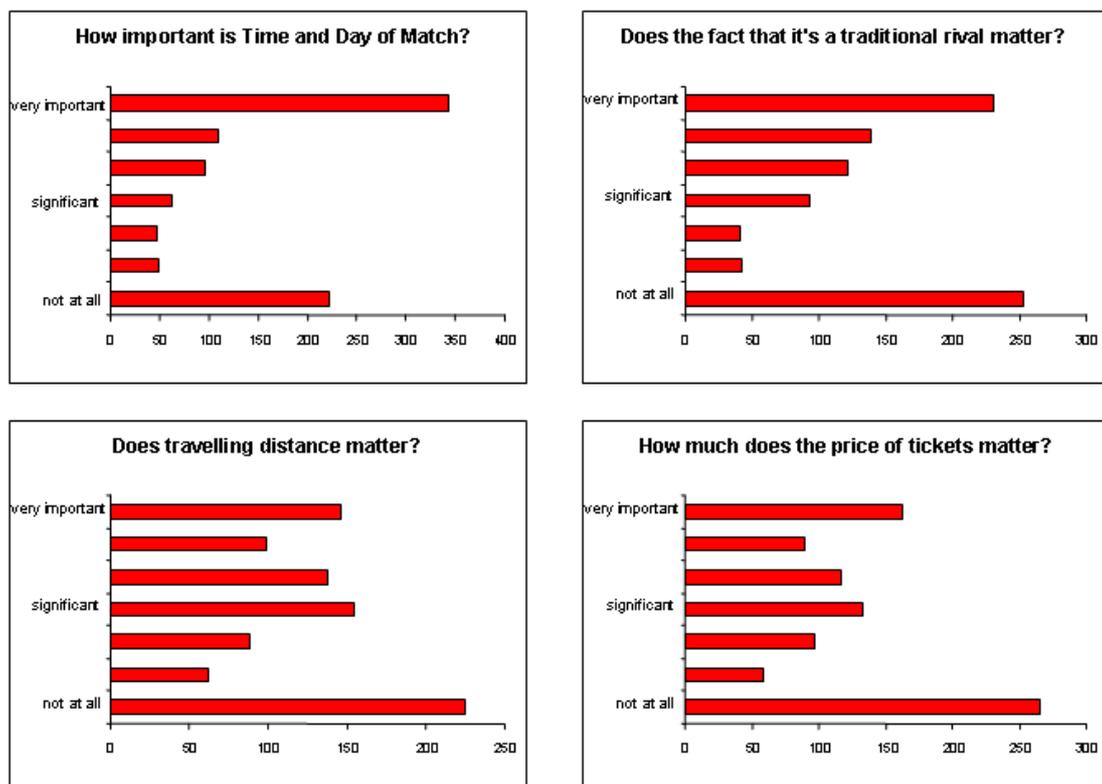


Figure 12: factors influencing match attendance

The factor with the highest average score, and the only one rated modally as “very important”, was the time and day of the match. Second in significance was whether or not the game was a derby game. In both cases the response profile is polarised with most supporters reporting the factor as either very important or not important at all. A hard core supporter might not admit that either of these factors would prevent him from attending, but those supporters who found these factors important at all mostly found them “very important”.

Travelling distance and price of tickets were expected to be factors only for domestic away games. Supporters do care about the price of home tickets, and appreciate and reward clubs who offer packages to enable families to attend at far less than the individual ticket prices.

Interestingly, the lowest average score as a factor (not shown in Figure 12) was the “off-field entertainment”. This has not been the experience of Newport RFC, where the introduction of more comprehensive off-field entertainment has coincided with a significant rise in crowd figures. In defence of the survey subjects, however, we asked them how important this was to *their* decision to attend, and in that light the answer seems to fit. It reminds us that this survey is dominated by the attitudes of committed season ticket holders. We do have a statistically significant number of subjects who do not have season tickets, and we expect their results to be different (and perhaps more interesting because of that).

It is not obvious what our data about match-day attendance says about any future restructuring of the professional game in Wales, though more detailed analysis might alter that. If the time and day of matches *is* the most important crowd factor, the Union may need to consider when professional games should be scheduled relative to semi-professional club games. Some of these decisions will rest with the broadcasters and sponsors, but to the extent that the Union has any influence it can bolster the traditional club game by scheduling professional games at times that do not coincide with the more constrained schedules of semi-professionals. Alternatively it can try to marginalise traditional club game support by scheduling top tier games to coincide with them. It looks from the data as if it might be risky to try to compete with the traditional game for traditional supporters, but if the Union plans to recruit a new generation of support for its professional game, then it may be able to afford traditional support.

9 Commitment.

The final section of the questionnaire attempts to measure supporter “commitment” to the club. This set of questions is an adaptation of a similar measure developed and widely used in the U.S. to try to measure “attitudinal”, as distinct from “behavioural” loyalty to a sports team. In a nutshell, attitudinal loyalty is something you feel for a team, while behavioural loyalty covers what you do (i.e. turn out to support the team). Although behavioural loyalty is what matters commercially to clubs, attitudinal loyalty is thought to be more stable and, it is hoped, is a better predictor of behavioural loyalty than vice versa. Furthermore, if we know what proportion of the crowd we can attract to a game are *attitudinally* loyal (the fact that they are there shows them to be behaviourally loyal) then we may understand how best to market the game.

The measure we developed for this research, particularly if we can persuade similar research projects into rugby support elsewhere in the U.K. to adopt it, will enable us to develop a better understanding of the outlook of the rugby consumer. For example, the survey reported here appears to be dominated by highly attitudinally committed supporters, but there is a widespread feeling among those supporters, and elsewhere, that really large crowds contain a large proportion of spectators who are simply interested in the immediate drama of single games. If this is true, and if our goal is large crowds at all rugby games, we may have to look beyond the self-labelled “true rugby supporter”. On the other hand, we may equally well find that the problem of small crowd sizes for clubs stems from a failure to convert a large number of attitudinally committed supporters into *behaviourally* committed supporters.

As a result of this survey, we have the first sizeable data base on attitudinal commitment to sports teams in the U.K., and are now in a position to use it to correlate data from the remainder of the survey. We can look at co-variance with age, gender, expression and origin of support, the

rivalry data we have collected, and the match day attendance factors. At the time of writing, we have not done any of this analysis, and the aggregate commitment data across all clubs, and even within clubs, does not show sufficient variation to be interesting in its own right at this stage.

10 Summary and Conclusions.

We have completed the data gathering phase of a pilot study into the psychology of top tier Welsh rugby support. The analysis of the data is now underway, and this report provides a first look at the top level results with limited club-by-club and no co-variance analysis. The project and the further studies that will stem from it are taking place at a crucial time for Welsh rugby, as it decides whether the needs of the game in Wales would not be better served by a different top level structure than the one from which the data was collected.

Although the results reported here are preliminary, they already provide statistically significant information about the nature of top level Welsh rugby support to complement the opinions and insights of those more intimately involved in the day-to-day running, playing and reporting of the game. Some of these results were predictable, but our research has at least confirmed and quantified them. Others were less predictable, and may be relevant to future plans for the structure of the professional game. The highlights are:

1. Support for top level rugby in Wales today is predominantly male and middle-aged. Among season ticket holders, support for a team can be lifelong.
2. Overall, Cardiff and Llanelli are currently the biggest “draws” for other teams in Wales, with the Llanelli-Swansea being the most significant derby game.
3. Only 27% of premier club supporters put Wales first in their loyalties.
4. Performance is not as significant to supporters as having a team that represents their area with distinct values and playing style. For *committed* supporters, very few factors other than time and day of matches affect the attendance. They most want to see close results in significant games with traditional rivals.
5. Most supporters make a very strong distinction between their club and other clubs, confirming the finding from our discussion group research that supporters identify closely with their clubs.

Any attempt to restructure the top level game in Wales must, in our view, be clear about its goals. If the goal is simply to provide the best development environment for Welsh international players, then the views of committed supporters of today’s clubs are largely irrelevant, provided the Union has sufficient funds to run what would effectively be Welsh trial sides without needing strong supporter backing.

If the goal is to create a commercial product that fulfils the supporter needs that are met today by premier division clubs, then restructuring requires more care. The need for distinct identity, including but not limited to place, playing style, and player base is paramount for today’s committed supporters. It is difficult to deliver if the teams are not perceived as independent of the Union and representative of the supporters own area and its values. This requirement for stable teams playing at fixed locations with distinct playing styles may be at odds with the ideal foundation for a national team coach, but it is not clear to us that *any* structure can deliver both.

11 Related Reports

Kidd, A. L. *"I was there!" – The Psychology of Welsh Rugby Supporters*, Research Report (October 2002). Available from: alison@prospectory.co.uk

Thomson, R and Kidd, A. L. *Welsh Rugby Supporters Project*, Slide Presentation (November 2002). Available from: dshearer@glam.ac.uk