



# THE UNIVERSITY *of* EDINBURGH

## Academy of Sport

### **EXECUTIVE SUMMARY: 2022 HIBERNIAN FAN ENGAGEMENT REPORT<sup>1</sup>**

1. This report sets out the findings and recommendations from the consultancy to undertake a review of Hibernian Football Club Fan Engagement<sup>2</sup> 2022. The consultancy was commissioned by Hibernian Football Club and undertaken by Professor Grant Jarvie, Jake Barrett and Dr Paul Widdop from the University of Edinburgh.
2. The purpose of the report is to offer observations and findings on the current Hibernian Football Club Fan Engagement landscape.
3. It is the second of two reports from the University of Edinburgh which can be used to provide a data informed perspective on Hibernian Football Club and its users<sup>3</sup>.
4. The consultation involved six main stages (i) a briefing and introduction to the remit; (ii) designing a bespoke Hibernian Fan Engagement Survey; (iii) a piloting and refining of the survey questions; (iv) data cleaning and a descriptive statistical analysis of the findings; (v) a series of focus groups with Hibernian Football Fans; and (vi) the production of a draft executive summary and a final report.
5. The Hibernian Football Fan Engagement Survey gave fans the opportunity to have their say on the experiences and issues that affected them as supporters. It was a wide-ranging, comprehensive survey, independently conducted, and focused upon a range of key issues including:
  - Socio-demographics
  - Reasons for becoming a supporter
  - The importance of winning
  - Attitudes towards the role of football in the wider community

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<sup>1</sup> An independent report produced by The University of Edinburgh for Hibernian Football Club. The research team consisted of Professor Grant Jarvie, Dr Paul Widdop and Jake Barrett. We are grateful to the support provided by Hibernian Football Club, the survey respondents and the fans who gave generously of their time to talk to us in the focus groups.

<sup>2</sup> Fan engagement is generally taken to mean - Everything is done to understand, respect, protect and grow the fan's emotional attachment to the club. Attracting new fans to the football industry is generally taken to mean that a shift in thinking is required as well as a readiness to engage in research, innovate and adapt the match day experience and related communications to meet their needs.

<sup>3</sup> The bespoke report on Hibernian Football Club arising from the Scottish Football Building Back Better from the Pandemic contained detailed demographic data about the geographic location of Hibernian season ticket holders for season 2018-2019. We have included this in the last section of this report on the City of Edinburgh because it provides an insight into where Hibernian season ticket holders live.

- Motivation to attend live football
  - Current season ticket holders
  - Lapsed season ticket holders
  - Match attendance
  - Ticketing
  - Travel
  - Consumption and co-creation of the match product
  - Stadium safety and inclusivity
  - Awareness of community activities
  - The club's promotion and stance on social issues
  - Sources of information and connectivity
  - Consumption of Hibernian TV
  - The importance of place (Edinburgh and Easter Road)
6. The survey questions were extensive in their scope, offering a greater level of detail than other football fan surveys, targeting similar target audiences. The response to the survey was impressive, with a large response rate that made the survey statistically robust. More than 10,000<sup>4</sup> people returned the survey which compares very favourably with other clubs' fan engagement surveys<sup>5</sup>. Approximately, just under,70% of the returns completed the entire survey.
7. Three prize draw incentives were offered by the club to those who took the fan engagement survey.
8. The focus groups were held at Easter Road during accessible evening slots from 6pm to 9pm. These were so designed to generate a thick description of important messages identified by fans in the Fan Experience Survey.
9. The report is structured around the following headings:
- Participant information
  - Relationship between club and their supporters
  - Match attendance
  - Matchday experience
  - Community role
  - Communication
  - Geography
  - Summary statement

## **Summary of Initial Findings**

### *10. Participant information*

- 82.2 % of respondents were male; 17.5% female and 0.3% non-binary.

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<sup>4</sup> 10,718 survey returns.

<sup>5</sup> For example, the 2019 Football Fan Engagement survey for the whole of the English Football League was completed by nearly 29,000 fans.

- 94.4% are White British; 4.4% Other; 0.7% Mixed/Multiple Ethnicity; 0.3% Asian/Asian British and 0.2% Black, African, Caribbean or Black British.
- 50% were aged between 29-58yrs with the median and mean age being 44yrs.

### 11. Relationship between club and their supporters

- 56.1% of respondents supported the club as a direct result of immediate family links with the club. A result of socialisation mechanisms.
- 26.6% of fans see showing loyalty/support of the club as more important than winning. It is the most important factor when compared to winning.
- 92.3% of respondents attended their first match before they were 20.

### 12. Match Attendance

- 22% of female respondents think football is an *“important part of family life”*, compared to 20% of male respondents.
- 24% think the club plays an important role in community life.
- 77.4% respondents have held a season ticket. The main motivation for purchasing a season ticket is guaranteeing a seat for home games and demonstrating club loyalty.
- 52.2% of season ticket holders think the season ticket prices are about right.
- 5.8% reported that the season ticket is *“significantly more expensive than it could be”*.
- 36.5% of respondents attend 16+ home games per season.
- Away attendance is clustered around 1-2 games, with 78.6% of respondents attending 5 or fewer games per season.
- 50% of season ticket holders recommend between £300 and £400 for a season ticket price.
- The most common reasons given for lapsed season tickets are work/family commitments, followed by lack of disposable income and season ticket cost.
- Overall, in relation to ticketing, fans most desire a straightforward ticket booking system; online availability; clear instructions; and clear pricing.
- 85.8% of respondents get their information from the club website with the vast majority of supporters also getting their ticketing information online.
- 46% of respondents think that matchday ticket pricing is slightly too high compared to 34% who think it is about right.
- Distance and travel cost are key considerations for away games, but less important for home games; this reinforces Hibernian’s status as a local club.
- The most popular mode of transport to Easter Road is by car (58.1%) followed by walking (22.2%).

### 13. Matchday Experience

- 71.7% reported the stadium experience as the key motivation for attending live games.
- 60.4% of respondents arrive in the pre-match 30-minute window. Peak arrival time is 30 minutes before the match.

- 14.7% of fans arrive more than an hour before the match.
- Most fans (56.8%) go straight to the stadium or go to a local pub (42.0%) rather than engaging with the facilities in the stadium.
- 4.6%, i.e., very few respondents, use the hospitality facilities and even fewer (0.7%) use matchday for professional networking.
- 28.7% of male respondents have been exposed to abusive language or aggressive behaviour at every game or most games in the past 6 months, compared to 22.5% of female respondents.
- This figure is higher for every Non-White ethnic group: Black, African, Caribbean or Black British respondents are most likely to experience abusive language or aggressive behaviour at every game (37.5%).

#### 14. Community Role

- 71.7% of respondents are “somewhat aware” of activities, with a similar amount who are both “not aware at all” and “very aware”.
- 86.9% of fans agree that it is important for the club to be a focal point for the local community, while 85.6% agree that Hibernian fills this role.
- 48.6% of fans think the club is doing “very/extremely well” in engaging fans on racism issues.
- 14.8% think the club is doing “slightly/not at all well” when it comes to engaging fans on social issues.

#### 15. Communication

- The most useful source is the official club website, with 68.5% of fans finding this useful, while five of the topmost useful sources are official club channels.
- Three of the top five main sources of information are social media.
- 31.1% of fans are using the club Twitter platform as their main source of information.
- 55.1% of fans say that connecting to Wi-Fi on a matchday is “*somewhat/extremely difficult*”.
- Fan forums (26.2%) emerge as a popular forum for post-match discussions: a number of those responding “other” list the Longbangers podcast as a source of post-match information.
- Hibernian fans are highly likely to watch games (81% watch Hibernian games on Sky Sports<sup>6</sup>). This has implications for future models and subscription services.

#### 16. Geography<sup>7</sup>

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<sup>6</sup> See analysis later in the report around Hibs TV.

<sup>7</sup> This section draws upon three sources of information; (i) the 2022 Fan Engagement Survey; (ii) Easter Road Fan Engagement Focus Groups held at Easter Road during March 2022 and (iii) the bespoke Hibernian Football Club data from the analysis of 2019-2020 season ticket holders which provided a unique and additional detailed level of granularity about the geography of Hibernian season ticket holders.

- 77% of supporters felt the City of Edinburgh was very important or extremely important to them.
- 68% strongly agreed that Easter Road was a special place.
- 88.51% of Hibernian season ticket sales for 2019-2020 come from the City of Edinburgh, the three most popular districts being EH4 (NW Edinburgh, Cramond / Blackhall / Craigleith, 7.03% of sales), EH6 (Leith, 6.85% of sales) and EH7 (NE Edinburgh, Broughton / Meadowbank / Restalrig / Craigentenny / Easter Road, 6.77% of sales).

## 17. Summary Statement

The survey identified the complexities of fandom. However, there were some clear evidence around needs, wants and desires of supporters that offer interesting scope to marketing and commercialisation of the club.

It appears that pricing structures at the club have yet to reach a price ceiling. There is evidence to support the idea that Hibernian has a strong sense of being a local club. The City of Edinburgh plays an important part of supporter's identity, as does Easter Road. This place attachment offers something unique in marketing terms, especially around branding around the importance of not just Leith, but the global city of Edinburgh. This is something that should be part of strategy, not only internally to those from Scotland, but the Scottish/Ireland diaspora in the Americas.

Online engagement clearly plays a role in the lives of Hibernian supporters and overall the club has a major control over the content in which supporters receive. We also are aware of the significant impact Hibernian fan forums have and there is opportunity for these groups to be part of a co-creation (prosumer) network.

## Section 1: Relationship Between Clubs and their Supporters

“I grew up in a family of Hibeer fans...dad, grandad and I was born locally ...My attachment to Hibs is a family thing but it is also a social thing”.

“For me it is about identity, the constant of it ...you know the team is always there...it is not necessarily the draw to go to Easter Road ...its more the habit... sometimes the worst thing is the game but getting the wee fellow ready to go and the before and after ...you know it's more the habit”.

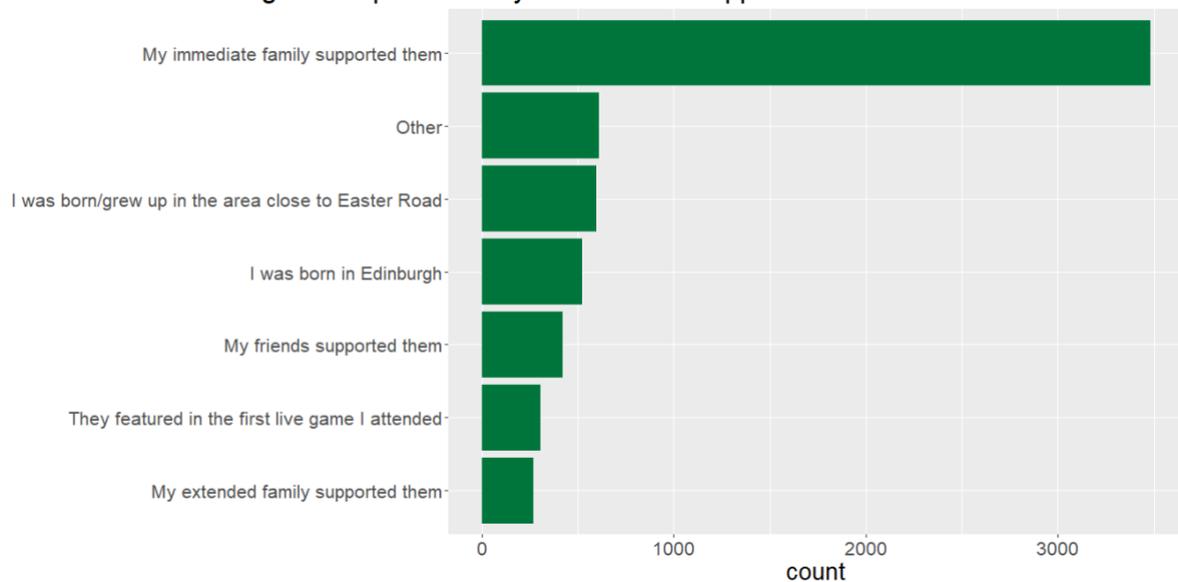
“Moved to Edinburgh 25 years ago and got hooked on watching a football team playing on the front foot and came here for no other reason...”.

“Belonging is really important”.

18. This section explores the relationship that supporters have with their club and looks at factors that influence their choice and reasons for becoming a supporter. It looks in more detail at the importance of winning, age of first attendance, motivations to attend live football and attitudes towards the role of the club.

19. The results demonstrate that family connections are highly influential in becoming a supporter of Hibernian Football Club.

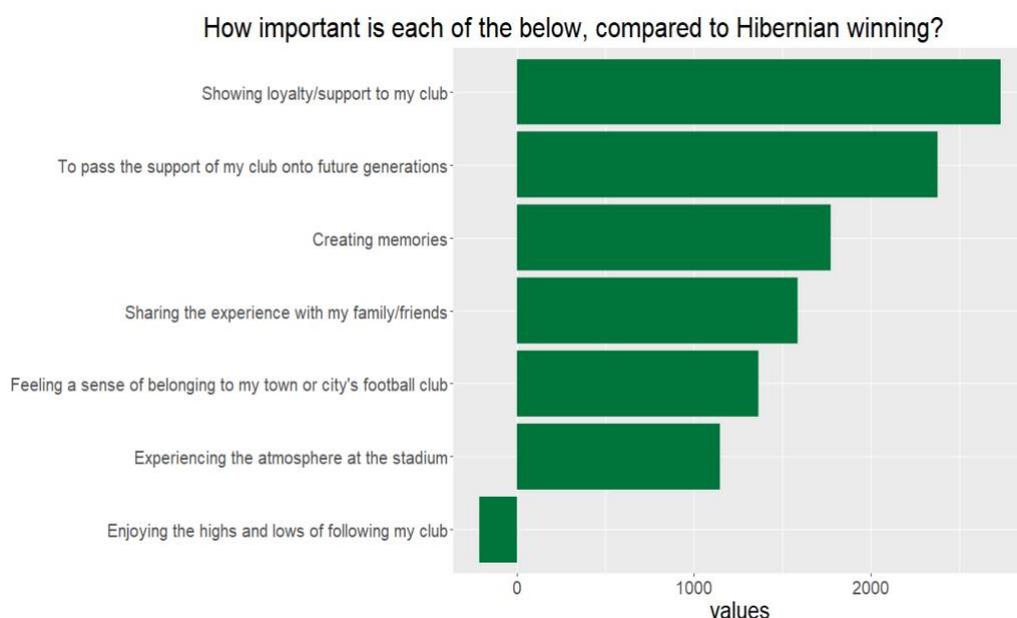
Which of the following best explains how you became a supporter of Hibernian FC?



### *1:1 Reasons for becoming a Hibernian supporter*

20. 56.1%, the majority, of fans became supporters due to immediate family links with the club. Whilst 'Other', represented 9.8% of respondents and was the second most popular choice. The most popular themes within 'Other' were moving to Edinburgh/Leith followed by Irish family connections.

21. There are several mentions of specific players<sup>8</sup> and fans influencing fans decisions. The 1972 Cup win is mentioned significantly which ties up with the average age of respondents and games that would have been influential in their childhood.
22. Building for winning and building for fan engagement are two different things. While it is important, supporting your football team isn't all about winning. The key area that the club has more control over is the fan experience and the various touchpoints<sup>9</sup> that can enable growth and sustainability. A dual focus is required – winning and engaging.
23. The results demonstrate that Hibernian fans see most options as being more important than winning.



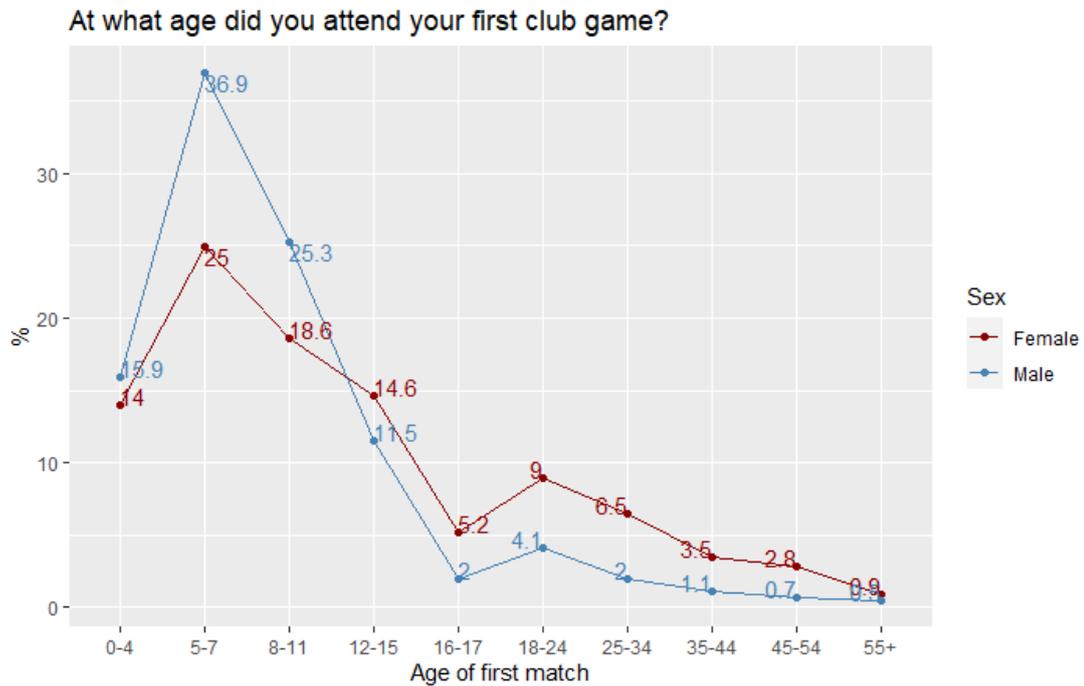
### 1:2 How important is winning?

24. 26.6% of fans reported that showing loyalty/support to the club is much more important than winning. Showing loyalty/support to the club was seen as the most important factor to fans.
25. Family ties are also important to fans, with “passing support to future generations” and “sharing the experience with family and friends” ranking considerably more highly than winning.

<sup>8</sup> Specific players regularly mentioned were e.g. George Best, Joe Baker, and the Famous Five, while Irvine Welsh was mentioned particularly amongst non-UK residents. There were also multiple mentions of the Proclaimers.

<sup>9</sup> The reality is that there are many touchpoints in the fan experience including: first impressions; ticketing; social media; travel; outside the stadium; retail/merchandise; social refreshments and inside the stadium. The ability of the club to regularly ask questions of the fan base on the touchpoint experiences is key to determining a prioritised list of improvements, opportunities to demonstrate that the club is listening, lifting levels of engagement with different segments of the fan base and helping to develop levels of trust between club and fan. Key regular questions to ask would be How do you rate the experience; Why do you say this and What could we do to improve the experience for you.

26. A connection to Hibernian often begins at an early age. On average respondents attended their first game just before turning 10.



*1:3 Age of first attendance*

27. 92.3% of respondents had been to their first match before the age of 20<sup>10</sup>.

28. Female respondents tended to have a slightly higher age of first match attendance, averaging 13.3 years compared to 9.3 for males.

29. Both male and female respondents have similar attitudes towards the role of the football club in their lives.

	All	Male	Female
My club plays an important role in its community	24%	24%	24%
Nothing can beat the live football matchday experience	23%	23%	24%
Football is an important part of family life	20%	20%	22%
My club's results mean more to me than the performance of my national team	18%	18%	17%

<sup>10</sup> This figure is slightly gender sensitive with 94.1% of males having attended their first match before the age of 20 compared to 83.5% of females.

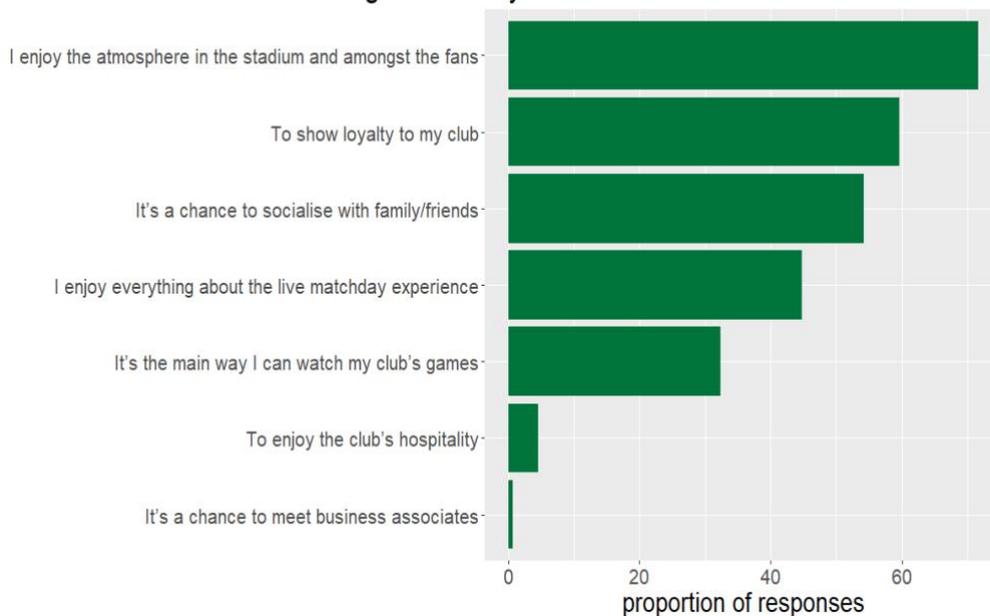
Going to watch football is a big part in my usual weekly routine 14% 14% 14%

*1:4 Attitudes towards the role of football*

30. 22% of female respondents and 20% of male respondents think football is an important part of family life. Both men and women agree that the club plays an important community role (24%). Both men and women think nothing can beat the lived experience (23%). This does not translate into going to the stadium as part of the weekly routine (14%).

31. 71.7% reported that the most common motivation for attending live games was the stadium atmosphere. Club loyalty and social factors also proved to be popular motivations. Such findings mirror results from other fan engagement research which suggests that the factors that influence support tend to be based around social and family aspects of attachment, and that the shared, communal experience of supporting a club is highly important<sup>11</sup>.

Which of the following motivates you to attend live football?



*1:5 Motivations for attending live football*

32. Only 44.8% of respondents agreed that they enjoyed everything about the lived matchday experience.

33. 54.9% of female respondents enjoyed everything about the matchday experience, which was significantly higher than that reported by males for the same theme. Female respondents were also slightly more likely to be motivated

<sup>11</sup> See for example the 2019 English Football League Supporters Survey.

by socialising with family and friends (58% v 56.4%) and enjoying the atmosphere in the stadium (77.7% v 74.5%)<sup>12</sup>.

34. Only 4.6% of respondents used the hospitality facilities and even fewer (0.7%) used the matchday for professional working.
35. As has been found in the findings from other fan surveys, supporters view their connection to their club as an integral part of their social lives. This is created through a combination of factors such as friends and families, proximity to the ground and the desire to leave a legacy to future generations.

## **Section 2: Matchday Attendance**

“The option to buy a ticket in towns and in other cities is available all year round ... we don't do enough to attract people to the club .... We have empty seats”

“Is there an easy way to transfer your season ticket for the day if you can't go?”

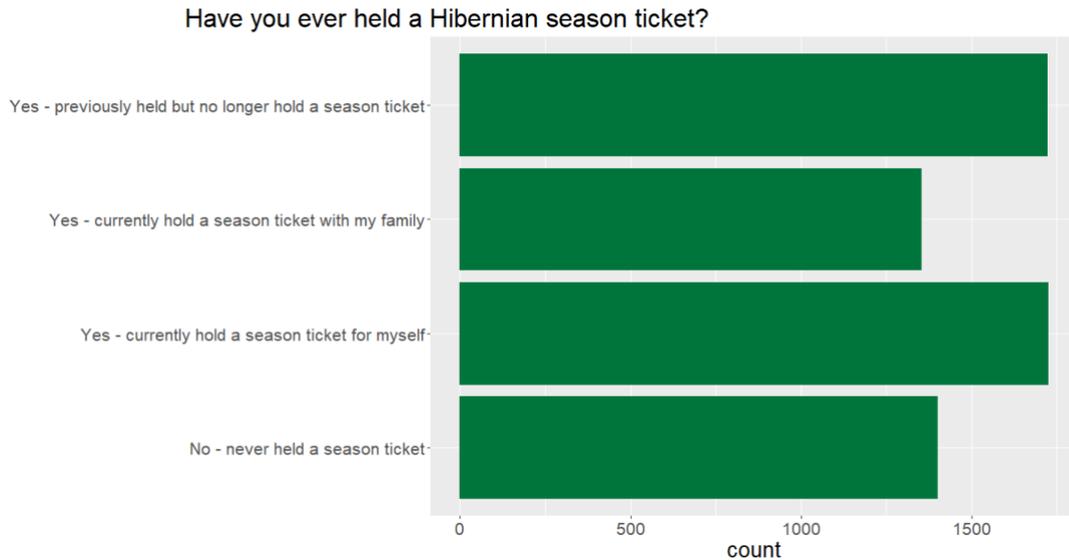
“I am this close to not coming back because the football is so bad but also a lot of people have got out of the habit of coming ... the ability to have the choice to watch the game at home gives options...”.

“The price difference of buying match day tickets for all the home games you want to see and the season ticket is not that great “.

36. This section explores season ticket ownership, reasons for lapsed season tickets, attendance and home and away games, factors affecting ticket purchases, where supporters get their ticket information from and the most popular mode of travel to Easter Road Stadium.
37. 77.4% of respondents have held a season ticket with 64.1% of all current holders having a ticket for either themselves or their family.

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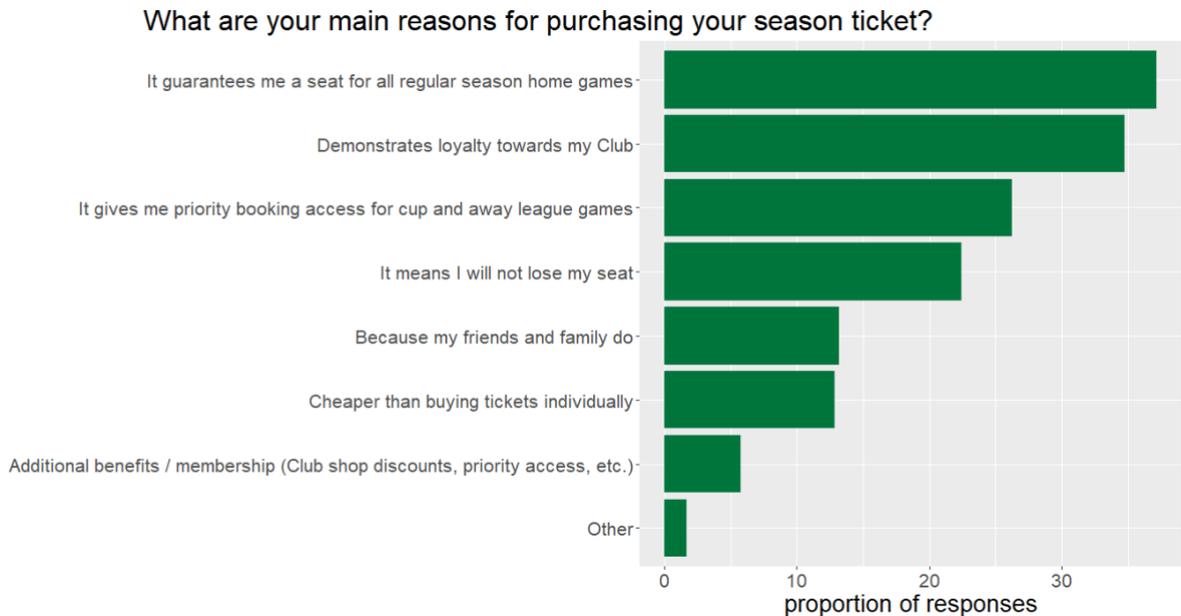
<sup>12</sup> British, including Scottish football fan surveys suggest that females - like their male counterparts - place atmosphere in the stadium as important. They place a huge emphasis on safety. Stadium facilities, quality of stewarding, attitude of club staff/stewards and the activities/ entertainment on offer for children and families also being more important to female fans.



*2:1 Season ticket holders*

38. On average season ticket holders have held their season ticket for 13 years<sup>13</sup>.

39. The main motivations for purchasing a season ticket were to guarantee a seat for all regular season home games and demonstrating club loyalty.



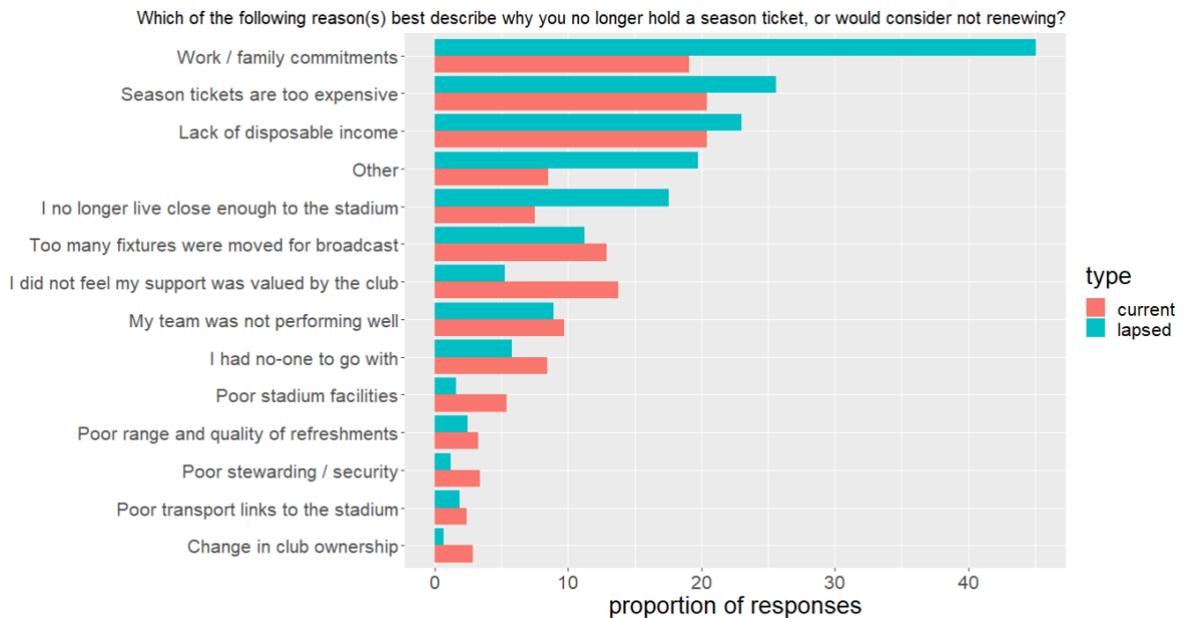
*2:2 Reasons for purchasing a season ticket*

40. Cost savings and additional benefits rank low in terms of priority. Other responses tend to indicate that this is because fans are happy to support the

<sup>13</sup> This figure is slightly gender sensitive with males having held their season ticket for 13.2 years and females 11.6 years.

club financially. This is particularly the case for challenging times such as the Covid-19 pandemic.

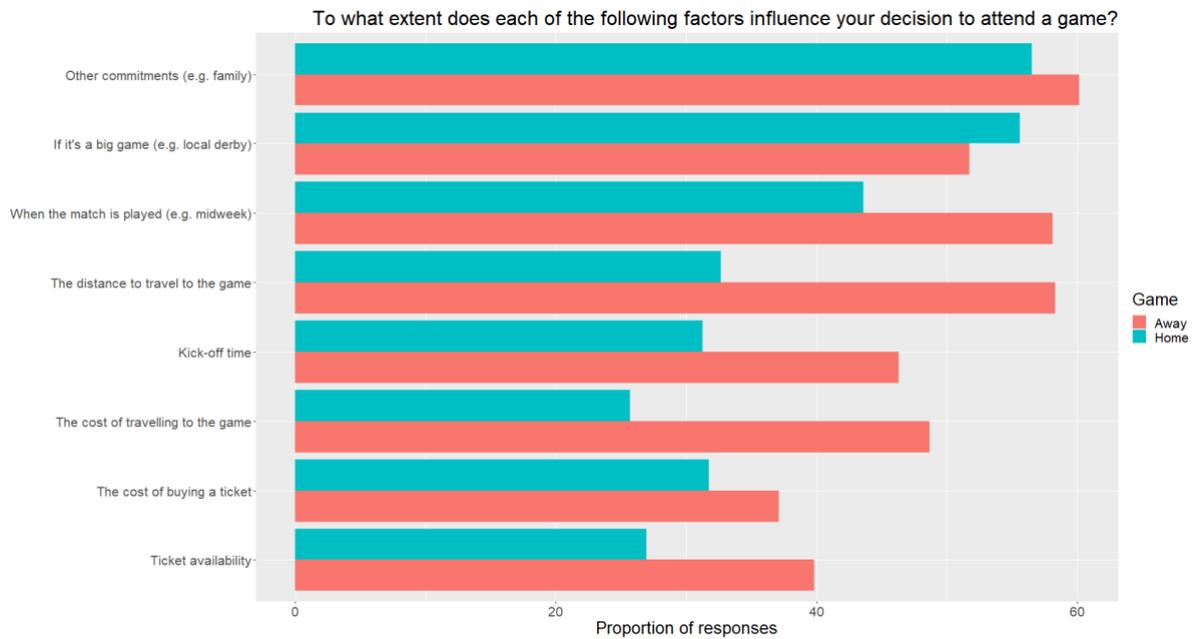
41. 52.2% of season ticket holders, more than half, thought that current season ticket prices were “about right”. Only 5.8% thought that season ticket prices were “significantly more expensive than it could be”.
42. When asked to give a blind recommended price for season tickets the average response was £335. 50% of season ticket holders recommended a price of between £300 and £400.
43. The most popular response for no longer holding a season ticket was work/family commitments followed by the lack of disposable income and season ticket cost.



*2:3 Reasons for no longer holding a season ticket*

44. When current season ticket holders were asked what factor would make them consider not renewing their season ticket the range of responses was slightly different with cost ranking highly but only representing an issue for around 20% of respondents.
45. When lapsed season ticket holders were asked what would influence them to purchase a season ticket again price ranked highest, both in terms of season ticket cost and having more disposable income. Time constraints was another highly ranked factor preventing season ticket renewal.
46. 36.5% of respondents attended 16+ home games per season. 78.6% of respondents attended 5 or fewer away games per season.

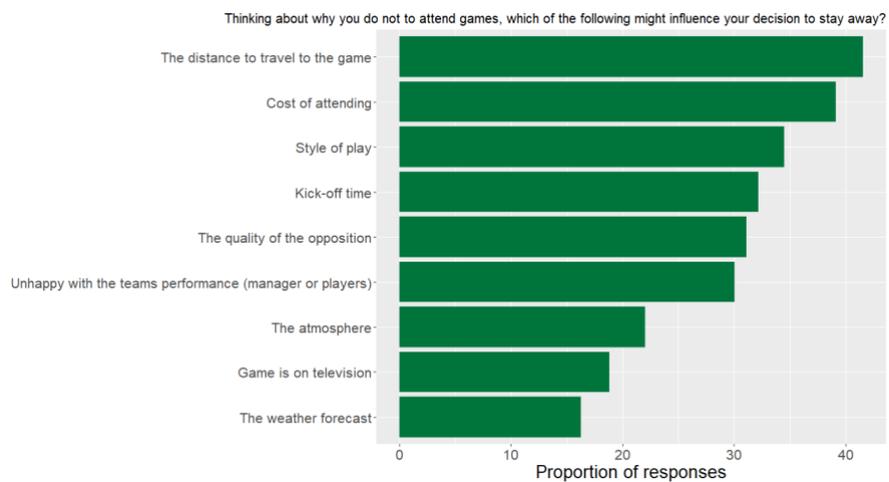
47. 56.5% of respondents for home games and 60.1% of respondents for away games cited other commitments (e.g., family) as the key factor influencing the decision to attend a game.



*2:4 Factors influencing game attendance*

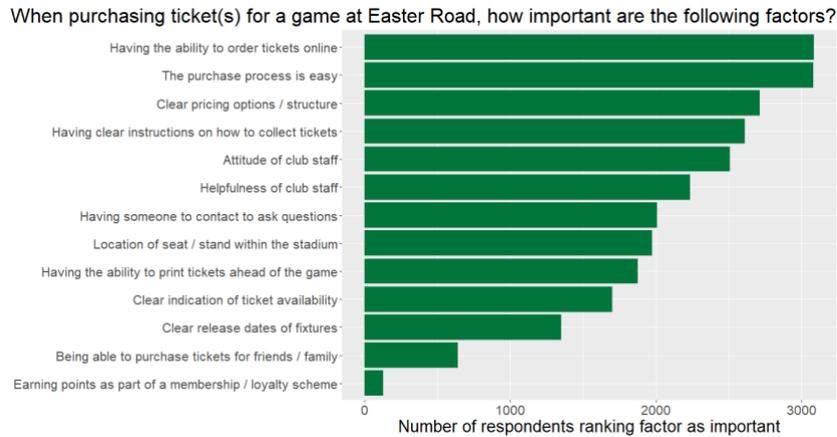
48. Scheduling of matches, distance and travel cost are key considerations for away games but less important for home games. This reinforces the notion of Hibernian’s status as a local club.

49. There are also factors that may influence a fan not to attend. 41.6% and 39.1% of respondents cited distance and cost as key factors.



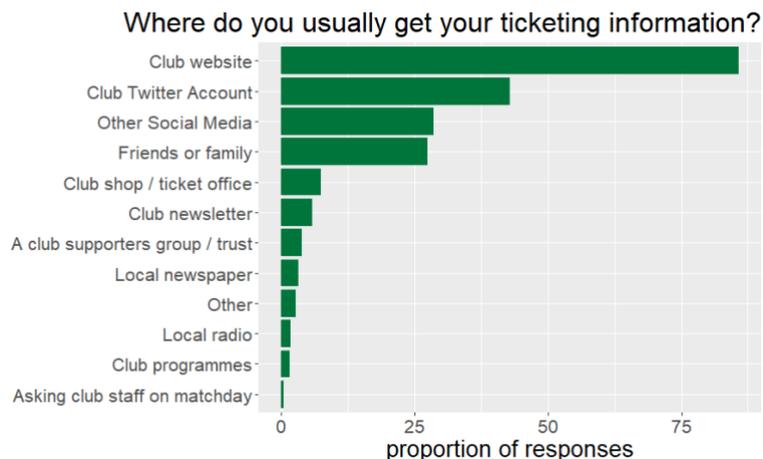
*2:5 Factors influencing decisions to stay away*

50. 34.5% thought style of play was a key factor. Only 18.8% of fans cited the game being televised or not as a factor not to attend.
51. Fans desire a straightforward ticket booking system with online availability, clear instructions and clear pricing.



### 2:6 Factors affecting the purchasing of tickets

52. The human touchpoint is very important with fans highly ranking the attitude and helpfulness of club staff. It is important to be able to contact a club person should any purchase issues arise.
53. 85% of respondents get their information from the club itself with the vast majority of supporters getting their information online.



### 2:7 Sources of ticket information

54. 46% of respondents thought match day ticket prices were slightly too high. 34% thought they were about right. When asked to give a free choice on matchday ticket pricing the average recommendation was £7.80. Given the average age of survey respondents this could be reflecting a general time when prices were a lot cheaper.

55. The most popular mode of transport to Easter Road is by car (58.1%) followed by walking (22.2%).



*2:7 Mode of transport to Easter Road*

56. The prevalence of walking supports the notion of Hibernian being a local club. The low utilisation of public transport could clash with the desired status of being a green club.

### **Section 3: Matchday Experience**

“Singing and positioning of the fans .... the singing section has got to be in the lower part of the famous five behind the goals.... every fan will tell you that .... “.

“For atmosphere I prefer going to away games.... When you come to Easter Road it is flat now...”.

“It would be good to have a roving camera or something so that fans in every part of the stadium can get closer to what is going on ...”

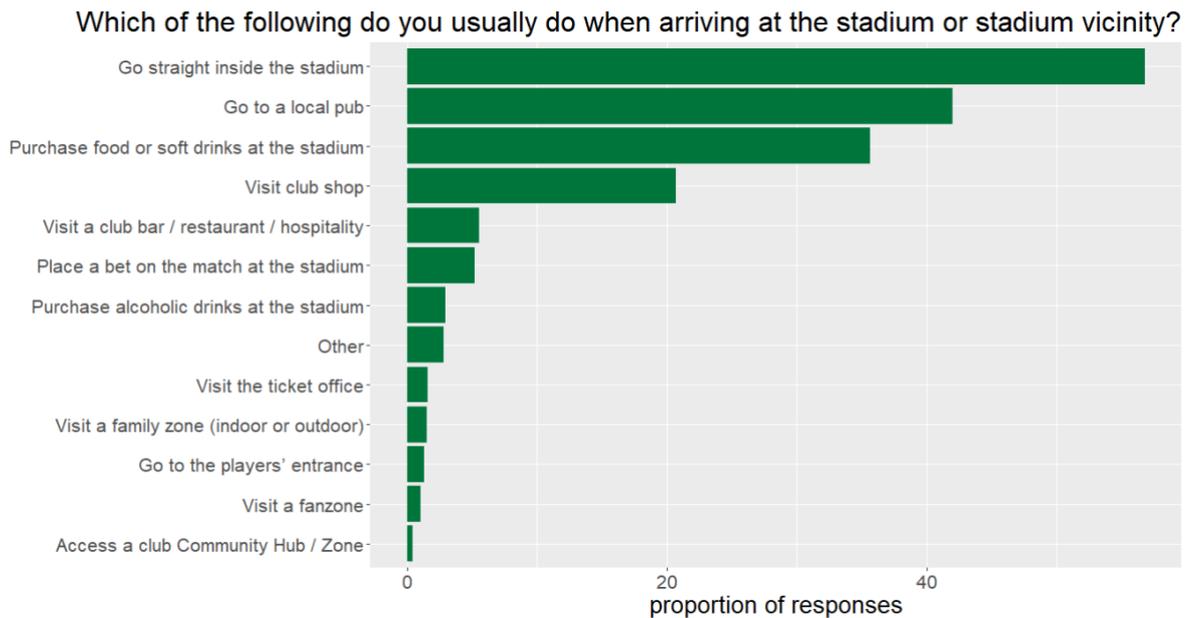
“Comparing it to the Murrayfield experience is a good thing...set up stalls, pockets of street food all the way along before the game or go to a fan-zone for a pint ...all these things would make you want to stay... coming into Easter Road you can't even smell a burger ...give the fans something to come early for and stay for...”

“Matchday experience for Hibs fans walking to the ground and exciting from old firm games is awful ...many teams keep the away supporters in the ground until it is clear...”

“Standing areas might help ...you definitely need a standing area for fans...”

57. This section explores supporters' perceptions of the matchday experience. There are many elements of attending fixtures that can influence fans' views of their club and impact on the overall experience they have. We looked at arrival at the stadium, the match experience, safety, and inclusivity.

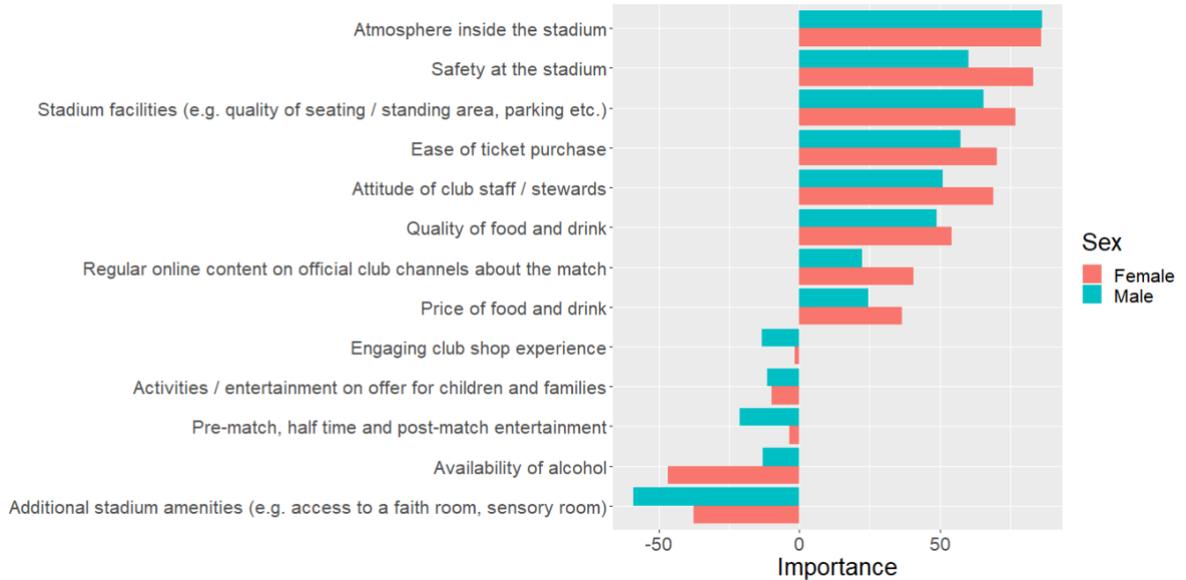
58. 60.4% of respondents arrived in the 30-minute window before the match. Fans are unlikely to arrive much earlier than this. Only 14.7% of fans arrived more than an hour before kick-off.



### 3:1 Activity when arriving at the vicinity of the stadium

59. Arriving at the stadium with little time to spare is correlated with fan activity in the stadium. (56.8%) go straight to the stadium or go to a local pub (42.0%) rather than engaging with the facilities in the stadium.
60. In the “other” category, two key themes emerge: many fans are critical of the in-stadium food offerings, choosing to get food at other local eateries, while there is regret that the Behind the Goals bar is no longer open or extensively available.
61. Pre-match behaviour differs significantly between male and female fans. In general, females are more likely to spend time on services provided inside the stadium: 44.5% of women will purchase food or soft drinks in the stadium compared to 33.9% of men, while 3.64% of women visit a family zone (1.08%) and 26.6% visit the club shop (19.5%). In contrast, 44.7% of men go to a local pub, compared to 29.5% of women.
62. Creating a positive match atmosphere in the stadium is vital. 86.2% more respondents rank this factor as “very/extremely important” than “not at all/slightly important”).

### How important are the following in creating a positive matchday experience?



### 3:2 Factors influencing a positive matchday experience

63. Following this, stadium facilities and safety are priorities. The main facilities (seats, parking etc) are considerably more important to fans than hospitality facilities. Food and drink rank relatively low, and the club shop, family entertainment, non-match entertainment, and additional stadium amenities all have negative importance (54.4% more respondents rank this as “not at all/slightly important” than “very/extremely important”).

64. There are differences in importance of the rankings between male and female respondents. Women rank safety in the stadium as more important (83.1% vs 60.4%), are more engaged with stadium facilities/food and drink and are significantly less likely to view alcohol availability as important (-13.0% for males, -46.7% for females).

65. Concerns around safety, in particular for female attendees, echo in responses to other questions. 28.7% of male respondents have been exposed to abusive language or aggressive behaviour at every game or most games in the past 6 months. This compared to 22.5% of female respondents. This figure is higher for every non-white ethnic group: Black, African, Caribbean or Black British respondents are most likely to experience abusive language or aggressive behaviour at every game (37.5%).

66. This problem appears to be focused among fans, rather than being an issue in stadium control. Only 13.8% of male respondents and 12.1% of female respondents think the overall quality of stewarding on matchdays is poor or very poor. This figure is similar across ethnicities except for Black, African, Caribbean, or Black British respondents, 42.9% of whom described the quality of stewarding as “very poor”.

67. An awareness of Supporter Liaison Officers (SLOs) is mixed. 36% of respondents have not heard of the role before, compared to 19.6% who are fully

aware of how to contact them. An awareness of SLOs is highest for white and male respondents. 45.9% of female respondents have not heard of the role, as well as 58.6% of those with mixed/multiple ethnicities.

When thinking about your usual matchday experience, how safe do you feel inside the stadium?		
	Safe/completely safe	Unsafe/not safe at all
Asian or Asian British	86%	7%
Black, African, Caribbean or Black British	43%	14%
Mixed or Multiple ethnic groups	93%	0%
Other ethnic group	90%	2%
White British	90%	1%

### 3:3 Experience of safety inside the stadium during matches

68. Despite some issues around abusive language and behaviour, most respondents do feel safe inside the stadium on matchday. 90.9% of males feel safe/completely safe, with the corresponding figure of 84.7% for females. But satisfaction is again lower across the board for ethnic groups.
69. Although figures are high overall, safety is a key concern, in particular for females. Aiming to reduce discrepancy between demographic groups, especially for Black British and female respondents, could significantly improve the fan experience and potentially lead to a greater number of ethnic minority fans feeling welcome to attend matches.

## Section 4: Community Role

“Community Foundation and the club should go more hand in hand ...the biggest asset to the club is the players who could be seen more in the community”

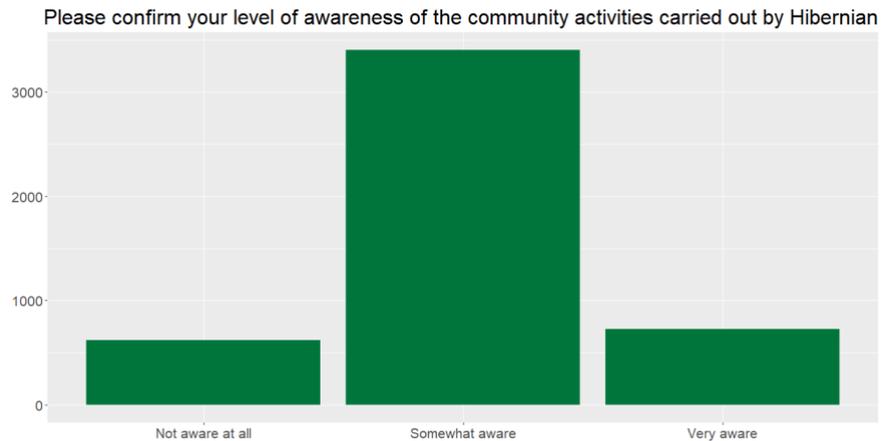
“The players do a lot in the stadium and training ground, but they could do more in the community both east and west ...

“Our school has 6 players in the Hibs Academy and not one of them has been invited to a Hibs match yet...”

“When we won the Cup in 2016 we toured the schools ...what the kids called The Golden Cup but surely we can tie in with schools across the city much more or the players occasionally taking the football training in schools”

70. This section explores supporters’ awareness of community activities and how well the club is doing in engaging fans on social issues.

71. 71.7% of respondents are “somewhat aware” of community activities, with a similar amount who are both “not aware at all” and “very aware”.



#### 4:1 Awareness of community activities

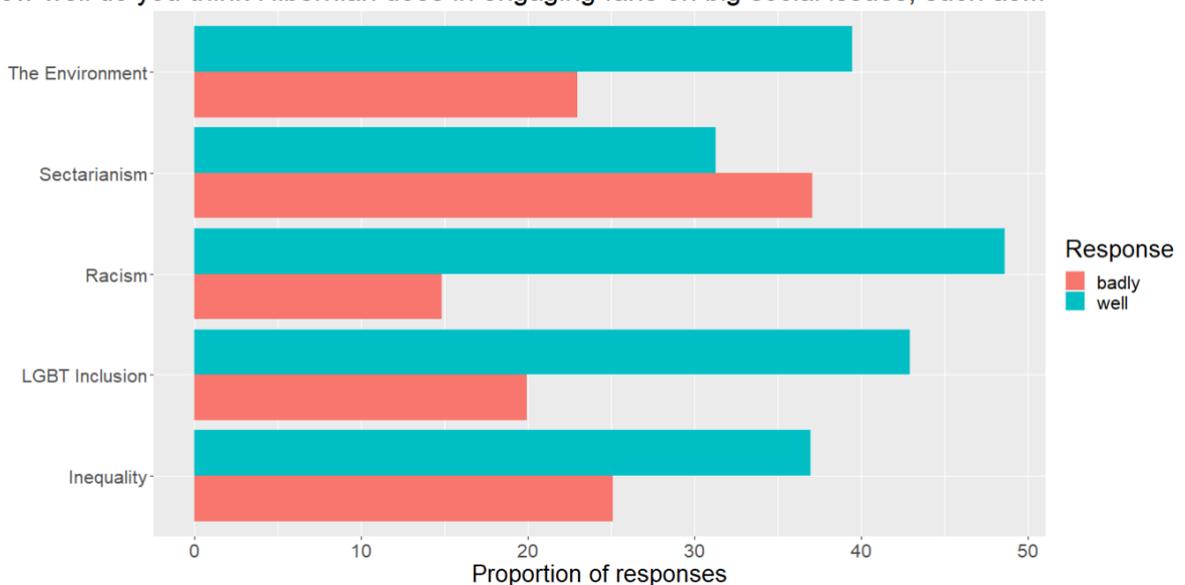
72. Of the awareness that does exist, the response is positive. 86.9% of fans agree that it is important for the club to be a focal point for the local community. 85.6% agree that Hibernian fills this role. Only 4.1% and 3.5% actively disagree with these statements. There is room for the club to grow in terms of its community role, making the most of the goodwill generated by its existing community role.

73. On the question of engaging fans with social issues fans are more likely to think that the club is doing well in engaging fans on big social issues. The largest positive here is on racism. 48.6% of fans think the club is doing “very/extremely well”, compared to 14.8% who think the club is doing “slightly/not at all well”.

74. The club is also seen to perform well in engaging fans on the environment, and to a lesser extent LGBT inclusion and inequality.

75. The club is not seen to perform well in engaging fans on sectarianism. 20.1% think the club is not doing well “at all” on this issue.

How well do you think Hibernian does in engaging fans on big social issues, such as...



#### 4:2 Club engagement with social issues

76. How do these views differ among the groups affected? On racism, 75% of Black, African, Caribbean or Black British respondents think the club is engaging fans well, compared to 49% of White British respondents.
77. Other ethnicities view the club's performance less favourably. Only 36% of Asian or Asian British respondents think the club is doing well.
78. LGBT fans are more likely to think the club is doing badly than well on engaging fans on LGBT inclusion. 33% of bisexual fans think the club is doing well compared to 34% who think it is doing badly. For gay / lesbian fans, the negative view is more pronounced: 36% think the club is doing well but 39% think the club is doing badly.
79. Engaging with these fans on why this is the case could help to build a more positive relationship and more inclusive space for these fans at Easter Road.
80. Being relevant to the local community and fanbase is now more important than ever. Clubs have to strive to find a way to play a bigger role in people's lives. The more clubs give back to the community the more the community embraces them<sup>14</sup>.

## Section 5: Communication and Broadcasting

"WIFI is awful ... at half-time fans want football information ...maybe their second team... getting football information through your phone ....and on the screens would make a big difference .... including in the concourse when you go to get food...."

"Club needs to make fans more aware in advance of what is happening – singer whatever..."

"I mainly get my information through twitter and sky sports app before the game ... sometimes BBC websites.... HibeasBounce is good for information..."

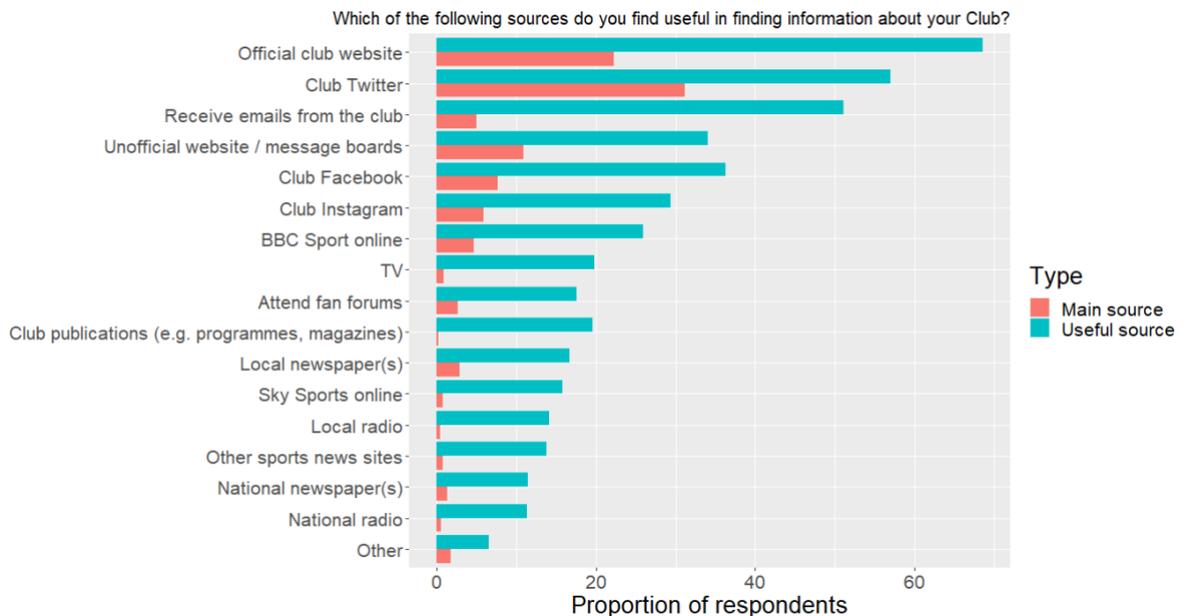
81. This section explores the use of club websites, role of social media, information during the game and post-match content. Communication for supporters now manifests itself in many forms, with the average football supporter engaging with over five different channels of communication with their club. Supporters can now access and receive information about their club 24/7, through both club official channels and other information sources.

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<sup>14</sup> The Dublin based Bohemians FC have focused upon the club standing for something and these values have helped them to develop services and programmes that clubs based upon winning alone will struggle to embrace. The aims were to increase attendance, to attract high quality fans, to rely less on results and to become integral to the community both visibly and statistically. The very local approach included: giving a percentage of raffle ticket revenue to local community groups; choosing a local kit supplier; having pies made by a company based less than a mile away; having quality beer from a brewery less than a mile away; supporting funding a bus to bring recent migrants to games; turning down sponsors and other commercial partners who do not fit the club's beliefs and values and getting involved in human rights issues: something that football clubs usually eschew.

82. Where do fans get information about the club? The most useful source is the official club website. 68.5% of fans find this useful. Five of the most useful sources are official club channels. Three of the top five main sources of information are social media.

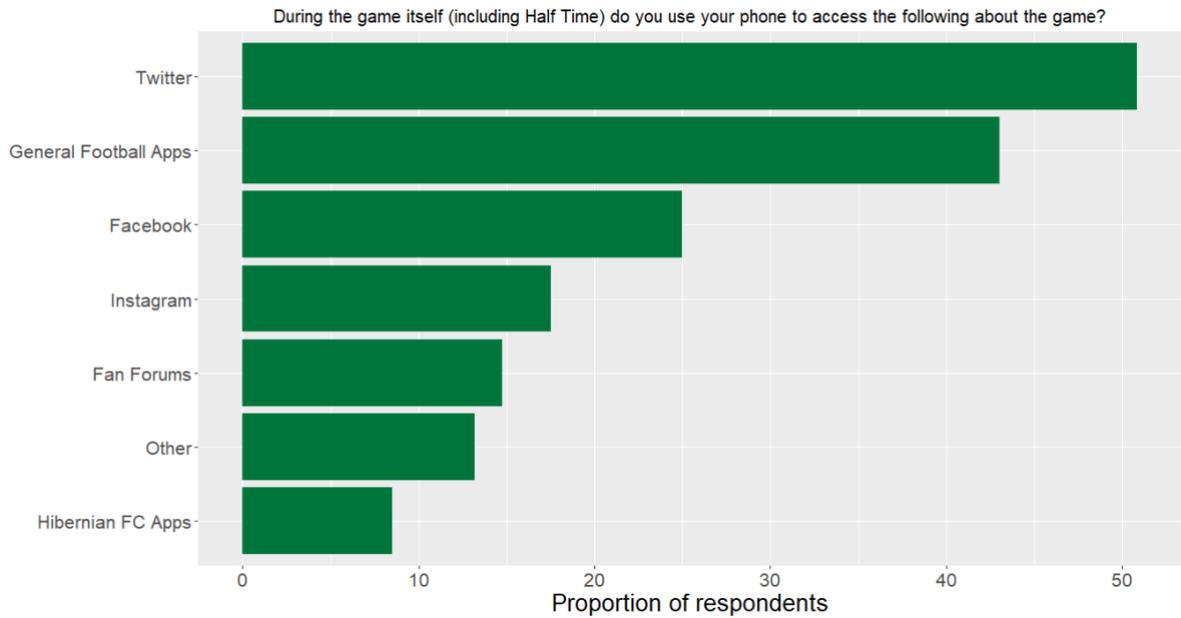
83. 31.1% of fans use the club Twitter as their main source of information. The club's Twitter feed is more popular than the official website as a main source of information, perhaps implying that fans are accessing the website via links posted on the Twitter account.



### 5:1 Sources of information about the club

84. Very few fans use sources outside the club as their main source of information, with 4.7% of fans using the most popular external source of BBC sport online as their main source of information. It is interesting to note that although few fans use club emails as their **main** source of information, 51% of fans view these emails as a useful source.

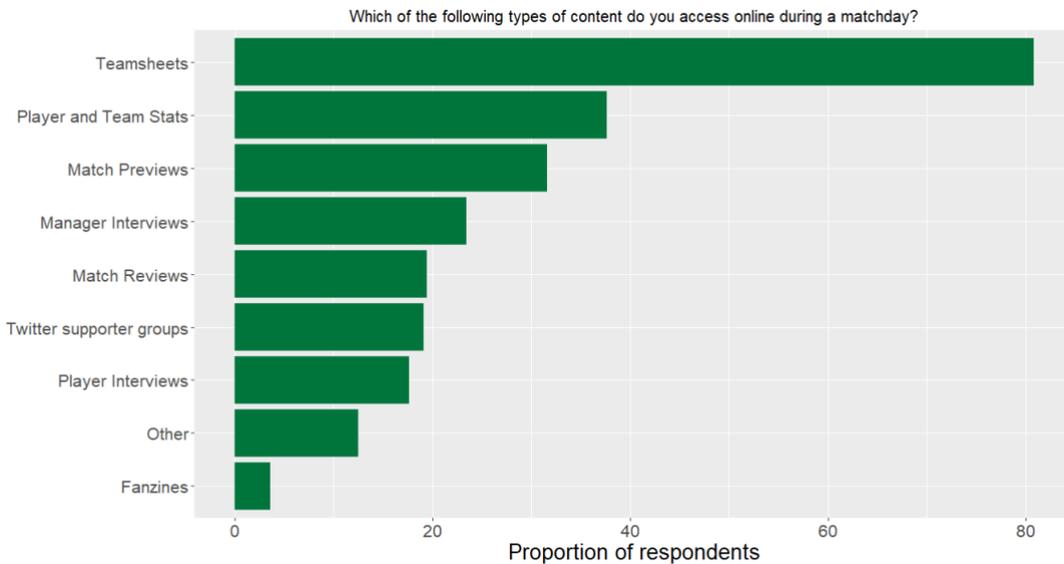
85. Where do the fans source information on matchday or during the match?



*5:2 Mobile phone usage during the game*

86. Over half of respondents use their phone to access Twitter inside the stadium. “Other” is more popular than the official Hibernian FC Apps. Looking at these responses, fans are generally either betting, checking other scores, or struggling to connect to the internet in the stadium.

87. Connection issues are a recurring theme for fans in the stadium. 55.1% of fans say that connecting to WIFI on a matchday is “somewhat/extremely difficult”.

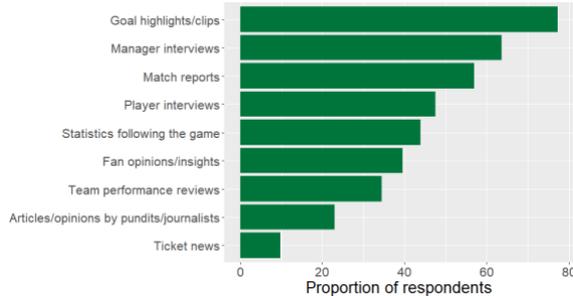


*5:3 Types of content accessed online during matchday*

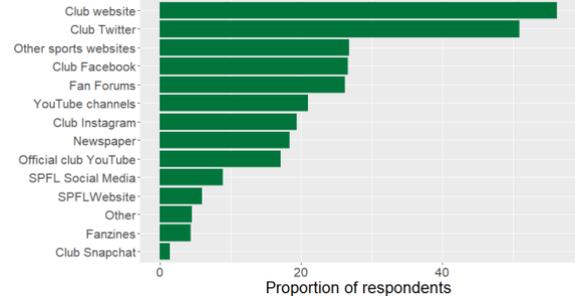
88. In terms of the content that fans access on a matchday, team sheets are by far the most popular content type, accessed by 80.8% of respondents. “Other” is a popular option in this question, and the open-text responses indicate that

accessing other match scores and betting sites are the popular options among fans.

After a match, which of the following Club content do you look for?

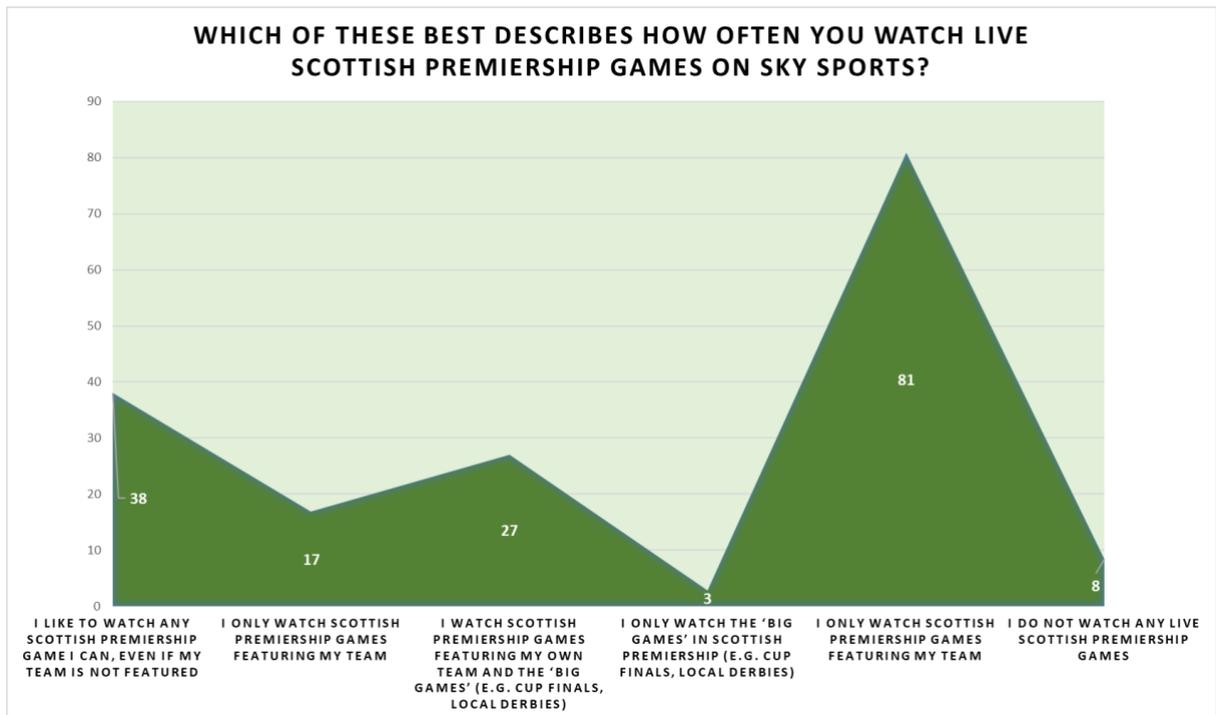


Which of the following sources do you use to find Club content following a match?



### 5:4 and 5:5 Post match content and source of information

89. After the match, the most popular type of content fans search for is goal highlights/clips. 77.2% of respondents are searching for this content.
90. The majority of fans get this post-match content from either the club website (56.3%) or the club Twitter page (51.0%).
91. Fan forums (26.2%) emerge as a popular forum for post-match discussions. A number of those responding “other” list the Longbangers podcast as a source of post-match information.
92. Media coverage has hypercommodified football and changed the landscape in which football clubs operate. The pandemic has also brought about different ways of consuming the game.
93. There is a range of purchasing behaviour among respondents, with only 5.9% of respondents never purchasing club merchandise. The most popular behaviour is to purchase on special occasions, e.g. gifts (39.3%). Purchasing behaviour differs for those who take family members to games. Those attending with family are considerable more likely to purchase multiple times a year or on special occasions, whereas those attending alone or with just friends are more likely to purchase either not at all or less than once a year.
94. Scotland is one of the few nations across the globe that relies heavily on the live event and ticket paying customers. It is important to reflect on media consumption and how supporters engage, not only for now but to identify trends in engagement.



*5:6 Hibernian fans Sky sports viewing patterns*

95. The figure above maps how customers consume live games of Sky Sports. Supporters of Hibernian are highly likely to watch games featuring them (81%). This has implications for future models and subscription services.
96. Thinking now about the consumption of Hibs TV, the survey uncovered some important data. There is a large body of supporters who are interested in data driven aspects of the game. This is in keeping with big data and complexity becoming important aspects of the game. Football analysis, for example, from passing networks to expected goals are becoming increasingly an important aspect of the consumption of the game. There are also a significant number of supporters who would visit the site more often if more video features and exclusives were made available as well as access to archival historical documents relating to Hibernian.
97. The information presented in 5:7 below is how respondents answered when asked what would make you visit Hibs TV?

## What would make you visit Hibs TV



Statistics and data on player / managers / divisions  
2292



More video features and exclusive interview  
2693



Historical archive of matches and records  
2039

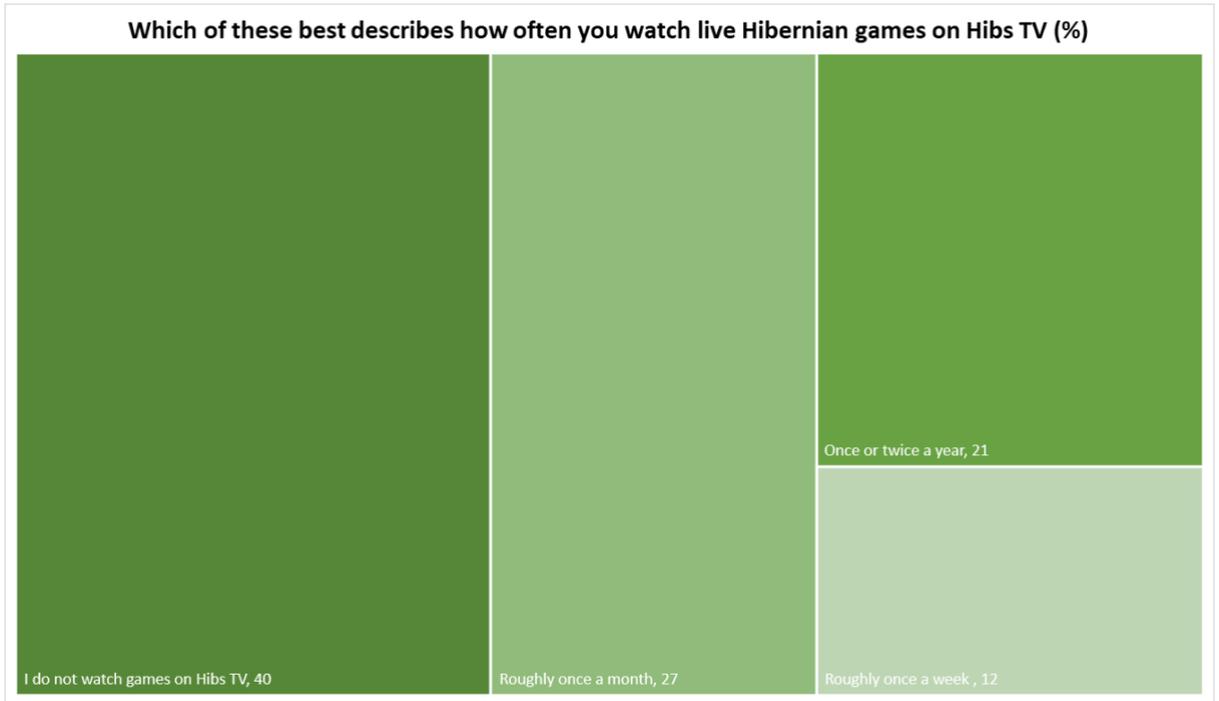


Fantasy league  
675

N. 4,172

### *5:7 Hibs TV*

98. During the pandemic we saw a rise in the number of supporters streaming live games, this is perhaps one of the most interesting aspects of how the pandemic altered consumer behaviour. The following tree map presents data on how often fans watch Hibernian matches on Hibs TV.
99. Around two-fifths of supporters say that they don't watch games on Hibs TV. This indicates that there is a relatively large untapped market for Hibs TV, especially given the findings within the graph of sky sports viewers.
100. 27% of survey respondents reported that they watch a game around once a month, with a further 12% indicating that they are weekly watchers.



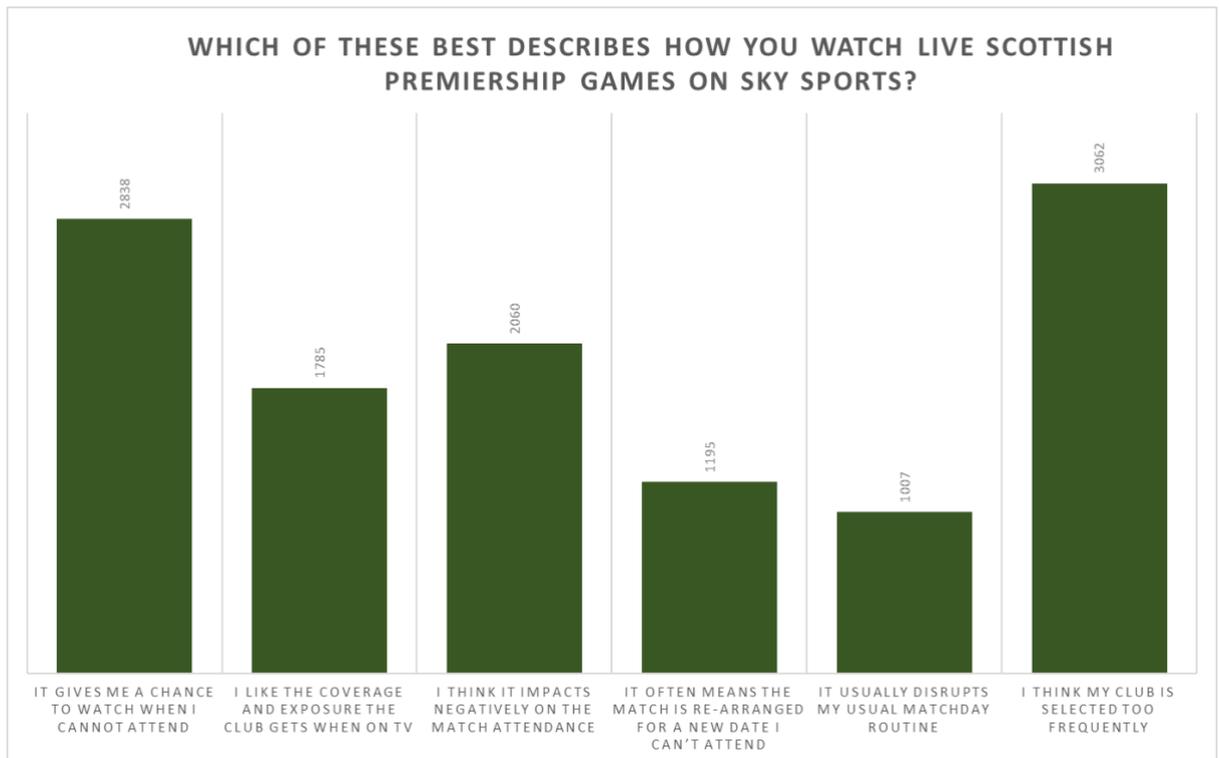
*5:8 Hibs TV viewing patterns for Hibernian matches*

101. Increasingly across a wide array of sports from the Olympics to the NBA, consumption habits are changing as fans are dipping in and out of content and often consuming bite-size pieces such as highlights, goals, and key decisions.
102. The following is the result of pressing supporters on where they watch these bite-sized media productions. 38% of fans report they get this content from Online social media, via Twitter, Facebook, Instagram etc.



5:9 Where do you watch goals and highlights

103. 20% report that they consume Hibernian channels, although the club app only represents 3%. 38% of supporters watch this content via TV channels (sky sports 18% and other TV channels 20%).



*5:10 Why would you watch Scottish Premier Matches on Sky Sports?*

104. Supporters were asked about their watching habits (TV) in relation to Hibernian. 2,838 supporters report that it gives them a chance to watch when they cannot attend. This was the second most response identified, behind 3,062 supporters who ironically suggested that Hibernian is selected too often on TV.

**Section 6: Geography**

“We don’t sell the concept of how beautiful Edinburgh is... we undersell the City connection...using the City of Edinburgh to encourage people to come to Hibs...”

“Massive market in other Cities for football tourism ...could Hibs and Hearts work together more on this ...so proud of not being part of the old firm... the City of Edinburgh is different...Could Hibs and Hearts have a booth at the airport?”

“We could have booths in Princess Street Gardens during the festival”

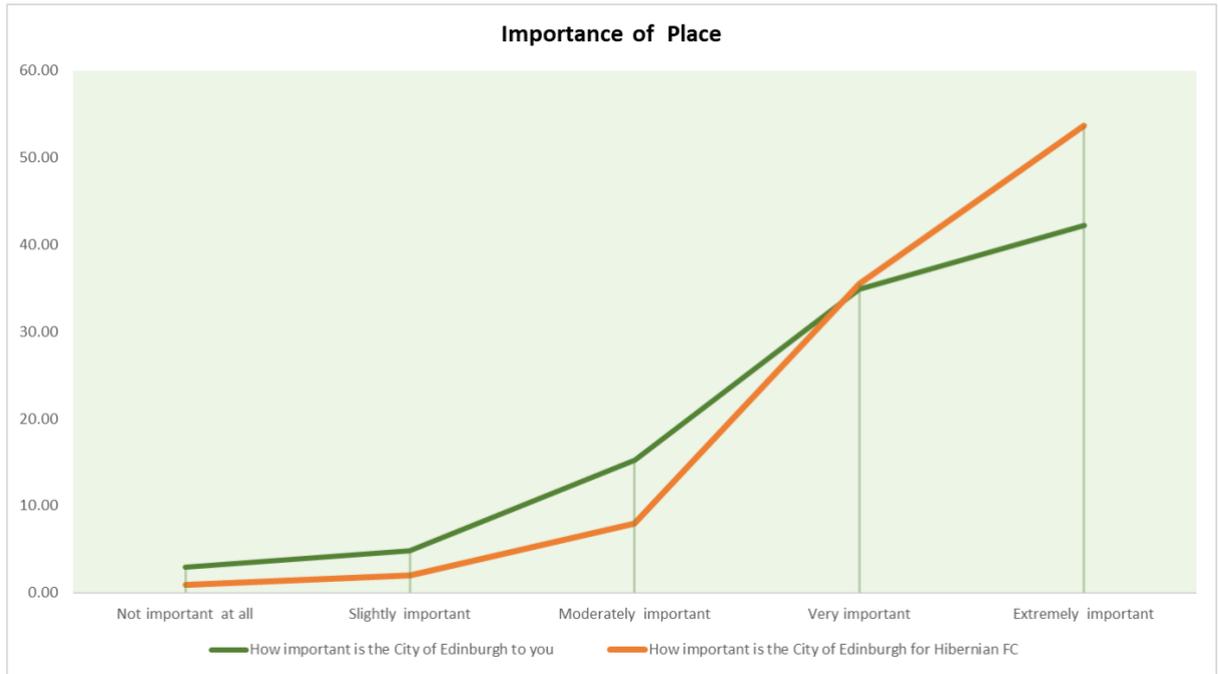
“Could the Hibs App go to every student coming to Edinburgh?”

“We bring a lot to the City and Edinburgh Council needs to help us more ...the park being shut on Sunday sometimes makes people stay at home when games are on..”

105. This section explores the importance of geography to fandom. What we know of Hibernian season ticket holders is that in relative terms they reside in very close proximity to the stadium with a distance decay effect as you move to

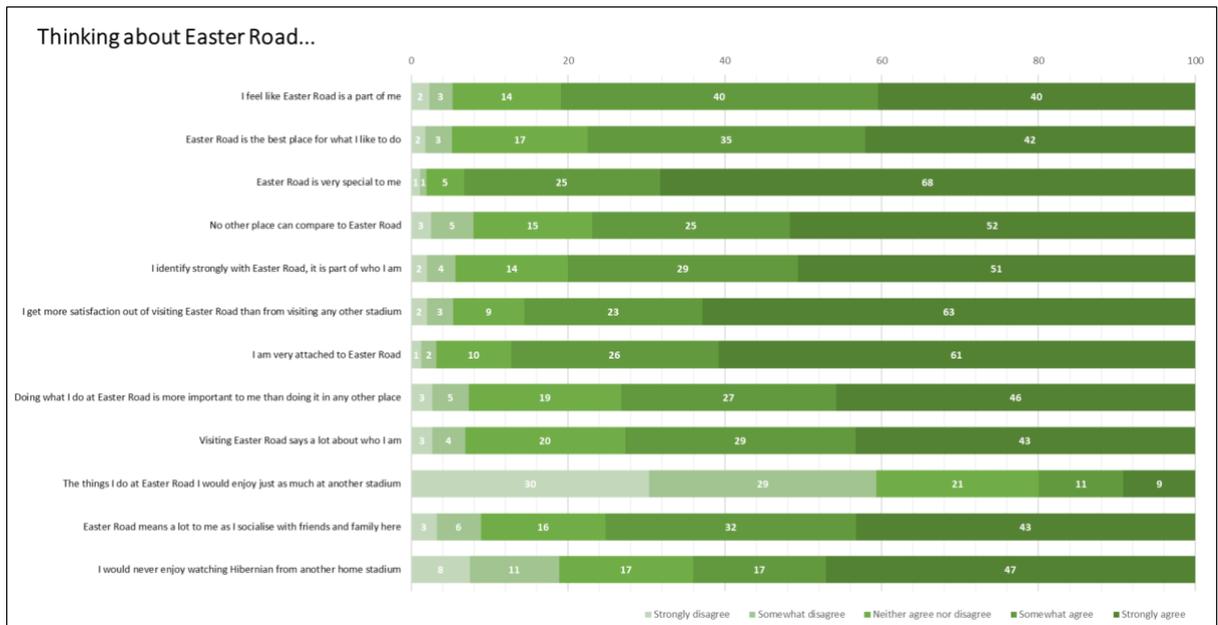
Edinburgh's fringe and surrounding hinterland. This suggests that fans of Hibernian are somewhat place sensitive.

106. Where we see geographical clustering among sport consumers, we tend to visualise areas high in place significance, that is the football club's role in place identity and individuals' sense of place, what geographers call place pride. This has significance for marketing and commercial operations.
107. The analysis of the 2019/2020 season ticket holders that the University of Edinburgh carried out for the club last year provided a significant amount of granular detail about where season ticket holders are located. 88.51% of these sales stem from the City of Edinburgh area postcodes, with the top sales areas clustered in North and East Edinburgh: EH4, EH6, and EH7 (the Easter Road postcode and Hibernian's home stadium). In general, matchday sales were more likely to come from areas outside Edinburgh, consistent with the travel commitments of a season ticket. Per capita, different areas emerged as the most significant buyers: particularly in NE Edinburgh, EH15, EH21, and EH7 all have more than 2% of their populations buying season tickets.
108. Of the 88.51% of Hibernian season ticket sales from the City of Edinburgh, the three most popular districts were EH4 (NW Edinburgh, Cramond / Blackhall / Craighleith, 7.03% of sales), EH6 (Leith, 6.85% of sales) and EH7 (NE Edinburgh, Broughton / Meadowbank / Restalrig / Craighentiny / Easter Road, 6.77% of sales).
109. The top 10 most popular Edinburgh postcodes accounted for 51.32% of season ticket sales. Outside of Edinburgh, the most popular areas for season ticket sales are KY (Kirkcaldy, 497 sales), TD (Galashiels, 238 sales), Falkirk (200 sales), Glasgow (173 sales) and PH (Perth, 68 sales).
110. Geography remains an important aspect of fandom, whether it is a sense of place, place pride, or proximity, place is important. Hibernian has a rich history located in the historical working-class districts of Leith, in a global city of Edinburgh. As such place is an important marker not just for Hibernian but also the fans.
111. In the survey, we asked two questions in an attempt to draw out the importance of geographical location, which should offer a great deal of support to future marketing communications and formation of cultural strategies. The first question probed the respondents' views on how important the City of Edinburgh was to them, whilst the second referred to how important the City of Edinburgh was to Hibernian FC.



### 6:1 The importance of place

112. 77% of supporters believed that The City of Edinburgh was very important or extremely important, 35% and 42% respectively. This place effect is also clearly identified in responses to how important the City is to Hibernian, with over 53% of supporters identifying how extremely important it is. How important a football club is to a city and or region is often overlooked as is the feeling fans have towards the role of their club in the city. There is a belief that Leith and Hibernian are symbiotic, whilst this is undoubtedly still the case, evidence here also identifies that this attachment is much broader in terms of geographical scale.

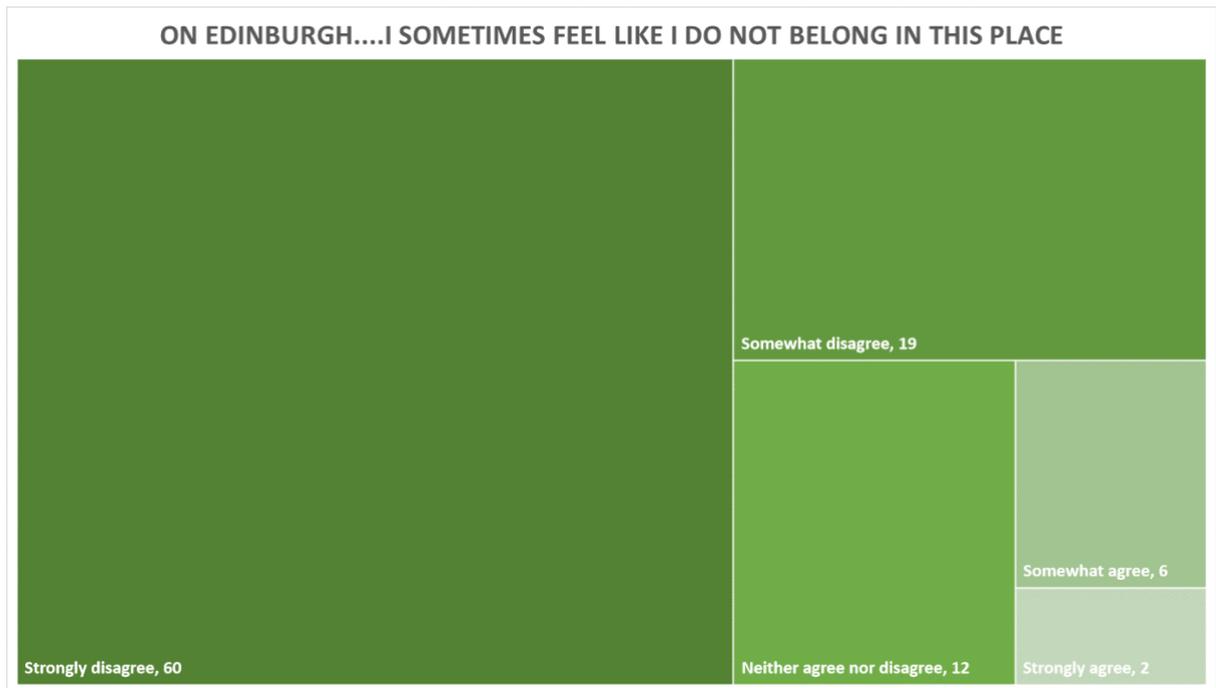


### 6:2 The significance of Easter Road

113. Over four fifths of respondents reported that they somewhat strongly agree that Easter Road felt like a part of them. 68% strongly agreed that Easter Road was a special place. 47% strongly agreed that they would not enjoy watching Hibernian in a new home ground.
114. Another significant finding revolved around just how attached the fans are to the ground. We asked respondents how attached to Easter Road they were, and 61% reported a strong agreement that they were attached.
115. Nearly 60% of supporters disagreed strongly or somewhat with the claim that 'The things I do at Easter Road I would enjoy just as much at another stadium'. From the responses to these statements it is clearly evident that Easter Road has a place has in the hearts and minds of supporters. It is a special place, with symbolic values and a sense of belonging.
116. A second set of place attachment questions reflected upon the supporter's opinions and attachment to the City of Edinburgh. Football clubs remain rooted in place, they reflect the local community and as illustrated they generate a place (stadium) that is a focus for beliefs, relationships and a sense of belonging. However, attached to these are also the supporters of wider cities in which the football clubs are located.

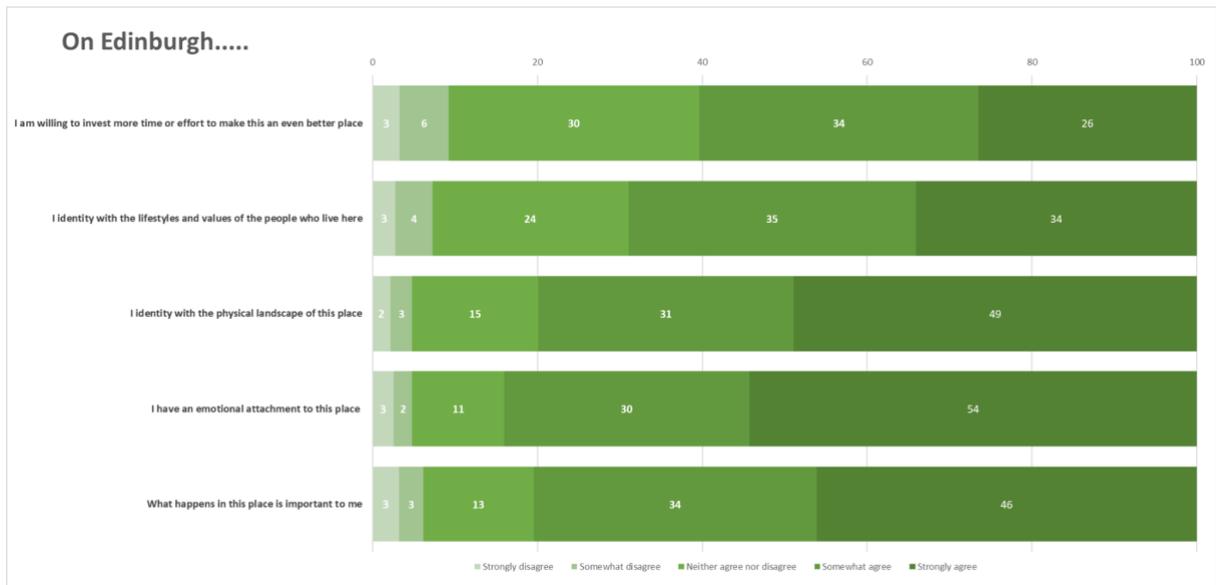


6:3 Sense of belonging to Edinburgh



#### 6:4 Sense of belonging to Edinburgh

117. The data above substantiates the general level of feeling that Hibernian supporters have for the City in which the club is located. The majority of supporters push back on the idea that they have no love for the City or that they don't belong. A large proportion of these fans reject these ideas and demonstrate that they are firmly anchored in Edinburgh and completely belong there. This gives a fair indication of the general feeling around Hibernian and Edinburgh, that there is a symbiotic relationship that coexists between the two. That being said it could still be stronger.
118. Approximately 69% of supporters identify with the lifestyle and culture of the City, whilst 60% agree (somewhat and strongly) that they are willing to put more into the City. This reflects the feeling of belonging they have to the city and identification of important community aspects such as social capital that the supports have.



### 6:5 The importance of Edinburgh

119. The data illustrates that supporters are embedded emotionally in the City. This is reflected in the 54% strongly agreeing with the statement around their emotional attachment to Edinburgh. People often symbolise attachment to places through the physical landscape, that could be the architecture, the physical geography of the land, monuments, places of worship and football stadiums. All of these contribute to the human and physical geography of the city. The supporters note in their responses that the landscape of Edinburgh is important to them, with 49% strongly agreeing that they physically identify with the landscape.

120. Edinburgh, Leith and geography matter to Hibernian supporters.

## Section 7: Recommendations and Observations

**RO1** Family connections through the generations and loyalty are strong values within the fan base. These should not be taken for granted. Hibernian fans appear quite traditional in their consumption habits. A large proportion of the respondents appear to be legacy fans with the average length of season ticket being 13.2 years for males and 11.6 years for females

**RO2** The respondents and the fan base appears to be not solely but primarily white British male with the the second largest group female. The data on inclusion and safety suggests that the club should do more work with targeted fan groups from under-represented groups at Easter Road. There is low representation of Asian/Asian British (0.3%), Black, African, Caribbean or Black British (0.2%) and mixed/multiple ethnic groups (0.7%).

**RO3** There is a balance to be found between accommodating the match day needs of family, children and traditional adult supporters. This tension appears to manifest itself most with regards to which fan segments should be behind the goals and what their needs are.

**RO4** All of the fan segments need to be listened to and catered for within the stadium. Quality craft beer, standing room, quality street food, singing space and quality lounges would all impact upon matchday experience and atmosphere and the potential of spending more time in the ground.

**RO5** The preferred singing space for a significant number of supporters is behind the goals in Hibernian Fan Zones.

**RO6** Fans want to feel closer to what is going on in the stadium. The digital capability of the stadium has still to reach its potential. Fans want to see , for example, the team coming out of the tunnel and this is problematic in many parts of the ground but could be solved relatively easily. Fans want to connect with football information from around the UK at half-time and full-time. More football information through the screens and being able to reliably access mobile phones at half time and full-time is seen to be important. Fans want to have closer connection to the game on and off the pitch during matchdays.

**RO7** On the other hand, a significant number of Hibernian fans are clearly engaging online, especially through Hibs channels and platforms. Online engagement clearly plays a role in the lives of Hibernian supporters and overall the club has a major control over the content which supporters receive. Hibernian fan forums help to carry club messaging and there is opportunity for these groups to be part of a co-creation (prosumer) network.

**RO8** Part of the marketing strategy around Hibernian is that it is the greenest club in Scotland, yet this didn't resonate with the fans who didn't mention it. A significant number of supporters drive to the match.

**RO9** The City of Edinburgh is clearly an underused asset in relation to the branding and imagery of the club. Whilst, Hibernian has a strong sense of being a local club, the City of Edinburgh plays an important part of supporter's identity, as does Easter Road. This place attachment offers something unique in marketing terms, especially around branding around the importance of not just Leith, but also being part of global City of Edinburgh and not being Glasgow. This is something that should be part of strategy, not only internally to target those from Scotland, but the Scottish/Ireland diaspora in the Americas<sup>15</sup>.

**RO10** The extent which the Hibs App has been optimised should be considered. Edinburgh , for example, is a student city as well.

**RO11** Selling the City jointly with Hearts was promoted by a section of the fans. Many rival teams work together e.g Barcelona and Real Madrid.

**RO12** There are opportunities for the club to get supporters to spend more time at the stadium. However, the stadium must form part of an authentic football experience with quality hospitality for all. Many highlighted the Murrayfield Experience as something to

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<sup>15</sup> The Scottish Government is currently considering its diaspora network and links and sport should be part of these developments.

be compared, perhaps for a select number of games. Pre-match drink, place to stand with Hibbee fans that can be family friendly would be popular.

**R013** Fans need to know well in advance what is going on and when.

**R014** It appears that pricing structures at the club have yet to reach a price ceiling but comparisons and value for money between season tickets and matchday tickets is a consideration

**R015** We note that Sevilla FC is being viewed as a possible comparison and draw the clubs attention to the fact that Sevilla FC are growing their innovation, research and development capabilities. Hibernian as a club also has significant knowledge to exchange.

Hibernian fans see football as part of their lives, a habit that has to be looked after and football clubs have to find a way to continue to be relevant, provide a quality experience and sustain multiple fan engagement opportunities for multiple groups, online, offline, in stadiums, around stadiums at home and beyond.

@29March 2022.