



THE UNIVERSITY *of* EDINBURGH

Academy of Sport

#AOSsportingsolutions #AOSsportingoutcomes

HAMPDEN NIGHTS

SHORT EXECUTIVE SUMMARY: 2022-2023 SWNT FAN ENGAGEMENT REPORT¹²

1. The report is the seventh in a series of data driven reports from the University of Edinburgh, Academy of Sport about Scottish football, and its users. Previous reports have helped clubs including Aberdeen, Heart of Midlothian, Hibernian, and Motherwell understand their fan base including the local and international reach of the clubs.
2. The evidence collected has also helped to inform the DCMS 2023 inquiry into women and girls' football in the UK.
3. The purpose of these reports are: (i) to offer observations and findings on the current Scottish football landscape for women and men (ii) to contribute to a closing of the data gap that exists between men and women's football in Scotland (iii) further demonstrate the University of Edinburgh's capability to inform and support both the football industry and the broader sports industry.
4. The production of this report involved 7 main stages: (i) a consultation with Scottish women's football about the research remit and existing data sets and reports on the women's national game and the club game; (ii) designing a bespoke survey aimed at the core fans who come to watch the national women's team at Hampden; (iii) a piloting and refining of the research questions; (iv) data cleaning and a descriptive analysis of findings; (v) a sentiment analysis of selected international matches at Hampden; (vi) the production of draft reports, a final report with an executive summary; and (vii) a user friendly slide deck of key findings.
5. The data gathering and report production extended over 18 months concluding in May 2023. The international survey was held open for 2 months. The sentiment analysis of

¹ Fan engagement is generally taken to mean - Everything is done to understand, respect, protect and grow the fan's emotional attachment to the team/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 fans needs.

² An independent report produced by The University of Edinburgh for in partnership with the SFA. ***The research team consisted of Professor Grant Jarvie, Dr Paul Widdop and Jake Barrett.*** We are grateful to the support provided by the SFA, SWPFL staff and the survey respondents.

the social media coverage and attitude to women's football targeted the period around selected international matches during 2022.

6. About four thousand fans repeatedly buy tickets for Scottish Women National Team matches at Hampden. The response rate to the survey was extremely robust with close to 24% (N=994) of SWNT core supporters completing the online survey. In sharing their views across a broad range of football-related topics, supporters have given us insights that can help to inform what fans want and how they experience women's international football at Hampden.
7. The Scottish women's national international fan survey gave fans the opportunity to have their say on the experiences and issues that affect them as supporters. The fan engagement survey was wide-ranging, comprehensive, independently conducted, and focused upon a range of key issues that figure in fan engagement surveys including:
 - Socio-demographics
 - Reasons for becoming a supporter.
 - The importance of winning.
 - Attitudes towards the role of football in the wider community.
 - Motivation to attend live football.
 - Match attendance.
 - Ticketing.
 - Travel.
 - Stadium safety and inclusivity.
 - Awareness of work on social issues.
 - The promotion and stance on social issues.
 - Sources of information and connectivity.
 - The importance of place and identity (Hampden and SWNT).
8. The sentiment analysis provided an insight into social media activity around SWNT internationals at Hampden. It builds upon previous social sentiment analysis of Scottish women's football suggesting that there is a neutral and or growing positive sentiment towards women's football in Scotland.

Summary of Initial Findings

Who are the fans?

- 51% were male; 48% female; 1% preferred not to say.
- 31% between 41-50 years; 22% 51-60.
- 81% were straight or heterosexual; 13% gay or lesbian and 5% bisexual.
- 94% identified as white British.
- 75% held a college, university, or post-graduate degree.
- 32% held professional occupations, 24% supervisory positions and
- The majority reported a household income of above 20k per annum.
- 12% reported household income of between 90 and 100k.

What do the fans want?

- Creating a positive match atmosphere in the stadium is vital.
- 61% strongly agreed that nothing can beat the match experience.
- 76% agreed that the atmosphere in Hampden was important.
- 80% reported that creating a positive stadium atmosphere is very/extremely important.
- 73% identified that SWNT was very or extremely important for them.
- A number of factors are identified as being more important than winning.
- 88% reported that sharing the experience with family or friends was equally, more or much more important than winning.
- 22% reported loyalty and support for the team as more important than winning.

Match Attendance

- 38% attend 3-4 international games a year. 43% 1-2 games.
- 83% don't attend away games.
- 61% reported other commitments (e.g., family) as the main influencing factor on the decision to attend a game.
- This was followed by the level of the game (e.g., World Cup Qualifier) and when the match was played (e.g., midweek).
- The cost of attending was not considered a huge influence.
- When asked what motivates you to attend live football the main motivation was the atmosphere, followed by loyalty to the team, and socialising. Hampden hospitality and a business opportunity was reported as being less important.
- The top stay away factors were distance to travel and kick off time.
- Less than 10% reported seeing their first international as a child.
- Location of seating in the stadium was also important (over 69%).
- 75% of supporters agreed that the SWNT provides an inclusive, accessible, and enjoyable matchday experience for all supporters.

Ticket Behaviour

- Clear communication of fixtures was an extremely important factor when purchasing a ticket (72%).
- 76% reported that ease of ticket purchase was very or extremely important factor contributing to the matchday experience.
- This is also true for purchasing tickets for friends or family.
- Tickets must be available online (over 80% reported this as very or extremely important).
- A clear pricing strategy was clearly important with 35% reporting it as extremely important.
- The location of seating in the stadium was also an important consideration. More than 69% reporting that it was very or extremely important to them.
- Of those factors that were least important to fans, printing tickets and earning loyalty bonuses were not really considered important to them.
- 40% of respondents get their ticketing information from the Scottish FA website, 17% from the SFA Twitter account, and 12% from SFA newsletter.

Pre-Match Behaviour

- 62% of supporters travel to the match by car.
- 54% of fans arrived 30 minutes before kick-off.
- 39% of fans arrived 1 hour before kick-off.
- 8% arrive at kick-off time.
- 47% go straight inside the stadium.
- 24% purchase beverages, 12% go to a local pub, 3% visit the fan zone.
- Arriving at the stadium with little time to spare is correlated with fan activity in the stadium.
- 11% arrive on public transport.

Communication and Consumption

- Supporters access and receive information about their national team 24/7, through both official channels and other information sources.
- 67% reported that they use the main SFA online/social media outlets.
- Popular content included team line ups (76%), team and player statistics (46%) and match previews.
- During the game itself (including Half Time) respondents access their phone and predominantly use Twitter (33%), followed by Facebook and Instagram (both 16%).
- 47% (very or extremely important) reported that communication through social media from the SFA supported the matchday experience.
- Stadium digital capability is important. Connection issues are a recurring theme for fans and stadiums.
- The more organisations give back to the local, national and international community the more the community embraces them.

Community and Social Issues

- 79% of supporters agree or strongly agree that the National Team plays an important role in the community.
- When asked how well the SNWT did on engaging on big social issues the results returned were relatively mixed, some positive and some negative.
- Given that the majority of supporters travel to the match by car (62%). This has implications when thinking of ways that the city and football can be more environmentally aware.
- 45% of survey respondents reported a negative score for tackling the environment.
- In relation to racism, 28% reported that SWNT did very well, whilst 20% stated the opposite.
- In relation to supporting the LGBT+ community, fans agreed (49%) that the SWNT were doing very or extremely well.

Geography and Identity (i.e., SWNT, Hampden and Scotland)

- 78% of supporters agreed with the statement that feeling a sense of belonging to their countries National Football Team mattered a lot to them.
- 86% thought it was very or extremely important for Scotland.
- Thinking about Scotland, 73% disagreed with the statement that they have no particular love for the place.
- 84% rejected the idea that they sometimes feel they don't belong to Scotland.

- 70% agreed that they identified with the physical landscape of Scotland.
- 31% agreed that they would be willing to make a greater financial contribution to making Scotland a better place.

Summary Statement

9. The fan engagement survey has helped to identify who are SWNT fans and what they want. The fans want atmosphere and a positive match experience.
10. The benefits of football understanding and taking a fan and community engagement approach to Scottish football is not at odds with the traditional monetisation model. A balance has to be struck.
11. There is a growing positive attitude to women's national football in Scotland. An observation that is supported by sentiment analysis findings.
12. Hampden as a place and SWNT as a symbol are both identified as being important for Scotland. Fans want information and stories about SWNT, but they are also willing and want to engage in social issues that are important to them.
13. The question remains open as to whether a sustained 24/7 fan culture around the women's national team has emerged in the way that it has around clubs.
14. It is important to maximise the number of games played at Hampden not just in terms of financial revenue but also growing, understanding and protecting the emotional attachment of SWNT fans to Hampden.
15. It is important to maximise the number of touchpoints that SWNT fans have with national football organizations but also who the fans are, what they want and how this is fluid over time.
16. Technology and stadium digital capability have an ever-increasing role to play in keeping both traditional and fluid fans engaged. Technological capability, use of off-field data, organizational agility and appetite for innovation remain crucial aspects of being ready and preparing for the future.
17. Ownership and control of pitches is an issue with their availability at a premium³.
18. Understanding Scottish football fans engagement and behaviour better has the potential of developing a much more focused model. This could unlock powerful new ways to produce, distribute, and measure football engagement and relationships based upon what fans, national and club communities, including online communities want. Women's sports in the USA are driving this community-based monetisation model successfully⁴. We can both contribute to and learn from what other countries do to advance women's football.

³ McKinley, H (2023). Leading the way for the elite women's game. Nutmeg. March 2023, pp22

⁴ See The Fan Project Report (2020). [How women fans will lead the sports industry into the future.](#)

19. A premium gameday experience plays a key role in retaining fans and increasing fan affinity.
20. Engaging with fans on issues affecting them could help to build a positive relationship and the feeling of Hampden being an even more inclusive space.
21. Being relevant to the local, national and international community and fanbase is now more important than ever. Organisations have to strive to find a way to play a bigger role in people's lives. The more organisations give back to the local, national and international community the more the community embraces them.
22. Improving economic mobility is a central goal for public policy. But how? Mobility is a complex, multidimensional issue, related to policies in education and training, housing markets, safety net efficacy, family stability, the labour market and much more. Creating opportunities for cross-class lines, i.e., social mixing across class lines looks to be one of the most promising lines of social mobility. Football could be one such important space⁵.
23. Playing more of the big games in the big stadia at club and national level. A big game strategy driving women's football attendances underlies structural and commercial growth potential in women's football not just in Scotland but across Europe⁶. The 'Big Games' strategy can play a determining role in driving structural change – a sustainable growth cycle – for women's football at both league and club level.

Recommendations and Observations

- **RO1** The opportunity exists to grow a more diverse fan base both in terms of age and ethnicity.
- **RO2** SWNT fan base is not primarily working class.
- **RO3** SWNT fan base possesses high levels of cultural capital.
- **RO4** Opportunities exist to create cross –class social engagement that helps with economic mobility.
- **RO5** Winning is important but the observations support the observation that for supporters of SWNT it is not always about winning. It is also about friendship, loyalty and belonging.

⁵ Reeves, R and Fall, C. (2022). Seven key takeaways from Chetty's new research on friendship and economic mobility. Brookings Institute. - <https://www.brookings.edu/blog/up-front/2022/08/02/7-key-takeaways-from-chettys-new-research-on-friendship-and-economic-mobility/>

⁶ The English Women's Super League (WSL) in the first half of the 022-23 season were up a staggering 267% on previous season, driven by a strategy of playing big games in larger stadiums which is filtering down throughout the league. Overall, average crowds in the WSL stood at 6,961 for the season up to January 21, 2023, more than two and a half times last season's average of 1,898. The total attendance throughout the league exceeded the quarter of a million mark after just 40 matches surpassing the total attendance for the whole of the previous campaign in a third of the time.

- **RO6** A clear pricing strategy and early communication of when fixtures are key factors.
- **RO7** Optimising the quality, accessibility and reach of SFA websites and communication channels remains vital.
- **RO8** Available resource to purchase tickets does not appear to be an issue.
- **RO9** Opportunities and challenges to hold fans in the stadium for longer times.
- **RO10** The fans want atmosphere.
- **RO11** Low levels of abusive language and aggressive behaviour.
- **RO12** Safety and the quality of food are important.
- **RO13** The digital capability of the stadium is important.
- **RO14** A significant number of fans are clearly engaging online, especially through SFA channels.
- **RO15** Fan forums can support SWNT messaging. The opportunity to optimise the co-creation of messaging exists.
- **RO16** A large viewership has not yet turned itself into an engaged online fan culture.
- **RO17** Maximise use of Hampden for SWNT and big club games.
- **RO18** Access to more equitable funding for girls within the football academies.
- **RO19** Ownership, control and access to facilities for women's football in Scotland has progressed but remains work in progress.

GJ, PW, JB (2023)
University of Edinburgh
Grant.Jarvie@ed.ac.uk
26 July 2023