



SCOTTISH FOOTBALL SUPPORTERS SURVEY

THE RESULTS

2022/23

OUR GAME, ONE GOAL
[SCOTTISHSUPPORTERS.NET/SURVEY](https://scottishsupporters.net/survey)



The Scottish Football Supporters Survey is a national survey run by Supporters Direct Scotland since 2012. It engages with fans of all clubs and levels across the country, to get their views on the beautiful game. The results enable clubs and governing bodies to make better decisions and improvements for the benefit of the game and its supporters.

This season's survey is the third in a three-year benchmarking study – a partnership between SD Scotland, the Scottish FA and SPFL, and builds on the three themes identified in 2017.

"VALUE FOR MONEY"

"FAN ENGAGEMENT"

"SUPPORTER EXPERIENCE"

We have already seen progress in each of these areas, and the survey findings will help us to identify more improvements that can be made to Scottish football.

This survey is primarily focused on men's senior professional club football, with some specific questions regarding women's and international football.

TOP 10 CLUBS SUPPORTED WITHIN THE SURVEY



82.34% of participants describe themselves as "I am a massive fan of my club" or "I am a big fan of my club"

67% OF PARTICIPANTS ARE SEASON TICKET HOLDERS

AVERAGE AGE:

Harder to reach younger fans – **12%** of respondents under the age of 35, compared to 31% in last survey

61% of responses from fans over the age of 55, compared with 32% in last survey

AGE GROUPS RESPONDING:

U 16	<1%
16-24	3%
25-34	8%
35-44	11%
45-54	16%
55-64	30%
65+	31%

GENDER

Male: 91.7%
Female: 7.5%
Other: 0.8%

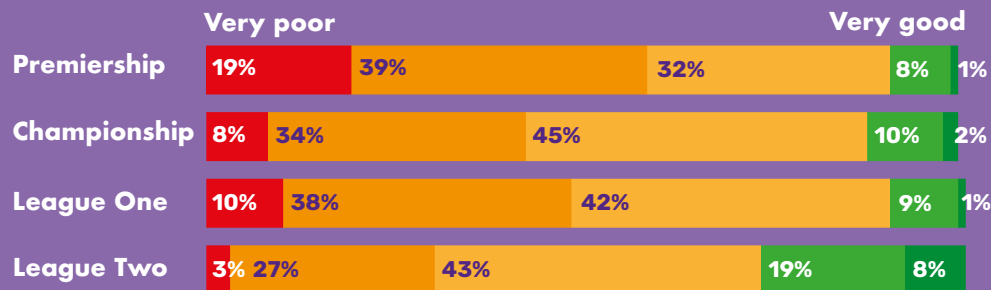


01. VALUE FOR MONEY



11% GOOD OR VERY GOOD
 ↓ slight decline from 2019/20, but much higher than 2016

BREAKDOWN OF VALUE FOR MONEY SCORES ACROSS DIVISIONS:



TOP 5 FACTORS AFFECTING ATTENDANCE



Relationship with club



Ticket costs



Kick-off times



Family commitments



Team performance



Rated the most important for the first time.



“Transport costs” also rising in importance this year, but outside the top 5 factors. Kick-off times lower in importance than in any other year.

02. FAN ENGAGEMENT

70% KNOW THAT THEIR CLUB HAS AN APPOINTED SLO

↑ up from **64%** last time, and **52%** in previous year

95% WHO HAVE NEEDED TO CONTACT AN SLO HAVE BEEN ABLE TO DO SO

↑ up from **88%** in previous year

81% BACK SUPPORTER OWNERSHIP

↑ up from **75%** last time

CLUB NEWS SOURCES:



83%
Club website

↑ up from **77%**



55%
Twitter

↓ down from **69%**



48%
Facebook

↓ down from **57%**



38%
Newsletter

↑ up from **29%**

CLUBS VIEWED AS BEST AT WORKING WITHIN THEIR COMMUNITY



WHAT THEY DO BEST:

Mental health and suicide prevention programmes for young men, commitment to improving affordability and providing free tickets for those on low incomes, genuine and authentic care for their community and a responsibility for their part in it (not just their paying supporters): "they seem to get what it means to be a fan and what it means to be a community club".



Their facility is always open and available for the local community, good links with local schools and community projects, it feels like the team are part of the town.

Focus on young people through coaching and work schools as well as encouraging young fans to attend games, they do more than most to establish close community links: "attempt to draw everyone to the club as part of a family".



Extensive youth football and grass roots programmes, good links with schools, support to their community during the pandemic, engagement across the whole community.



Sharing their facilities with the whole community through local youth groups and clubs, schools, and their own youth teams.

03. SUPPORTER EXPERIENCE

TOP 3 FACTORS AFFECTING OVERALL EXPERIENCE

ATMOSPHERE

CUSTOMER SERVICE

FACILITIES

BEST MATCH EXPERIENCE



The best atmosphere in Scottish football, in a stadium designed with fans close to the pitch and with a great view of the action, located in the city centre with good local facilities and transport links.



Good catering and facilities, and an approach to pricing that encourages visiting fans to attend.



A friendly welcome from club staff and home fans, good catering (especially the pies), and a traditional stadium that allows fans to stand or sit.



Friendly stewards and supporters, always made to feel welcome, and good catering.



Good transport links and parking at the stadium, low ticket prices and fan-friendly ticketing arrangements, positive attitude of staff and security personnel (and several mentions for their SLO who is visible and knowledgeable).

INCLUSIVITY AND DISCRIMINATION



of supporters believe their club provides adequate facilities for disabled supporters, down from **66%** last year



Improvement in most categories, but still unacceptably high levels of **DISCRIMINATION**

We still have a problem with discrimination...

	WITNESSED:	BEEN SUBJECTED TO:
Sectarianism	89%	41%
Racism	56%	4%
Physical abuse	56%	17%
Homophobia	51%	1%
Sexism	44%	3%
Disability	14%	2%

29% ARE **NOT** LIKELY TO REPORT DISCRIMINATION



down from **35%** last year

'SCOTTISH FOOTBALL IS COMMITTED TO A HIGH-QUALITY FAN EXPERIENCE'



16%




55%





04. OTHER INSIGHTS


Opportunities to increase attendances at women's football:



 **31%** of fans believe that an increase in the quality would increase attendances.

 **28%** would be more likely to attend if they knew when and where the game was on.
↓ down from **40%** last time, and **43%** previously

 **21%** would be more likely to attend if there was better promotion from the media.
↓ down from **32%** last time, and **39%** previously

 **22%** believe that being a fan of the club playing would encourage them to attend.

TELEVISED GAMES



Increase in support for more televised games

0: 9% 1-20: 19% 21-40: 22% 41-60: 16% 60+: 34%

SCOTLAND GAMES:

 **80%** are proud to support Scotland up from 55%

 **67%** believe that being a Scotland fan is part of who they are up from 49%

 **39%** believe that Scotland home games are about more than the result up from 26%

THE FUTURE

 **34%** OPTIMISTIC  **31%** PESSIMISTIC

27% - 47% last year, 41% - 34% previously

SCOTTISH CUP:

89% ➔

BELIEVE THE SCOTTISH CUP IS 'OUR' CUP

unchanged from last two surveys

76% ↑ 

BELIEVE IT IS A GREAT SPECTACLE

Up from 69%

BEST AT DEVELOPING YOUNG PLAYERS:

1. DUNDEE UNITED 2. HAMILTON 3. HIBERNIAN 4. CELTIC 5. MOTHERWELL

THINGS THAT ARE MOST ADMIRRED:



They give their home-grown players opportunities to play first team football, and opportunities to move on to other clubs.

Early opportunities for first team football, lots of home-grown players in the squad, they give local youngsters a clear pathway from community development to the first team and beyond, at rack record of players who have moved on to great careers outside of Scotland.



Formal links with clubs outside of Scotland, development and integration of the academy and first team in a consistent style of play.

Opportunities for first team football alongside high profile players, many players have long careers in the game even if they don't make it at Celtic.



Young players are given a chance, lots of opportunities for first team experience.

"As Scottish football emerges from a difficult period we are pleased to see the return of this important survey, which provides us with invaluable insight into how fans perceive Scottish football and any issues affecting their enjoyment of the game.

It is heartening to see the significant increase in supporters who are proud to support the national team. This increased engagement is evident in the significant number of sold-out matches the Men's team enjoyed in 2022, while the Women's National Team saw back-to-back record attendances for their FIFA World Cup play-off matches.

We are fully aware of the challenges that fans face in the current economic climate and will continue to endeavour to assist with this whenever possible. In the past year we have kept ticket prices for Scotland matches lower than they were five years ago, while also allowing clubs participating in the Scottish Cup to kick-off earlier to assist with the cost of energy bills."

Ian Maxwell, Scottish Football Association

"It is great to see this report return following its pandemic hiatus, and it offers our Member Clubs a good opportunity to look back and reflect on all the hard work they have done within their communities. This valuable insight helps our clubs to do even more for their fans and to grow the game of football for both the men's and the women's game. Despite the disruption brought on by the pandemic, football remains one of Scotland's biggest vehicles for good and this report helps us to shape its future."

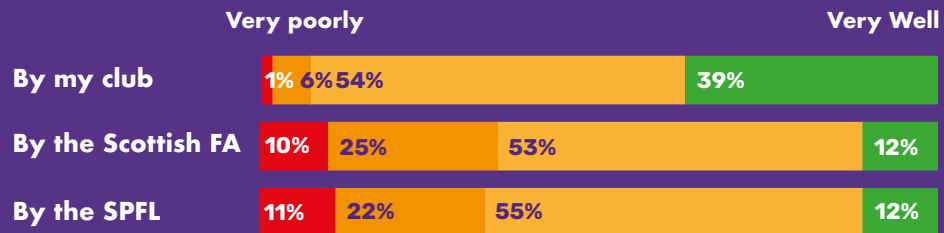
Neil Doncaster, Scottish Professional Football League

"Over recent seasons we've seen gradual improvements in perceptions of Value For Money, and the efforts of clubs to improve affordability, particularly in the lower divisions, have been recognised by supporters. The cost of living crisis and the continuing impact of the pandemic have changed many supporters' relationship with football, and we will have to work hard to reach those who have disengaged from the sport. This survey shows once again that the things fans' want - a close connection to their club, and a great atmosphere and fan-friendly facilities on matchdays - can be delivered at any level of the pyramid, and together we can strengthen Scottish football."

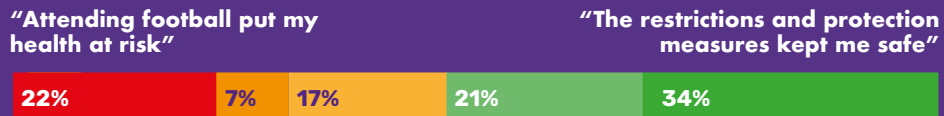
Alan Russell, Supporters Direct Scotland

05. THE COVID-19 PANDEMIC

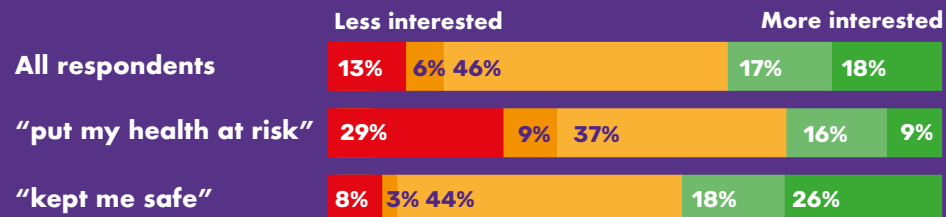
During the pandemic, how well were the attendance restrictions and protection measures communicated?



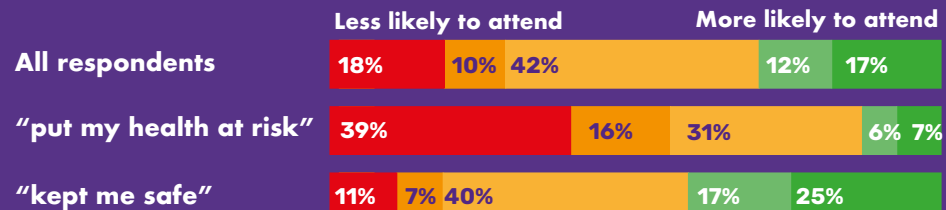
If you attended football during the pandemic, how safe did you feel?



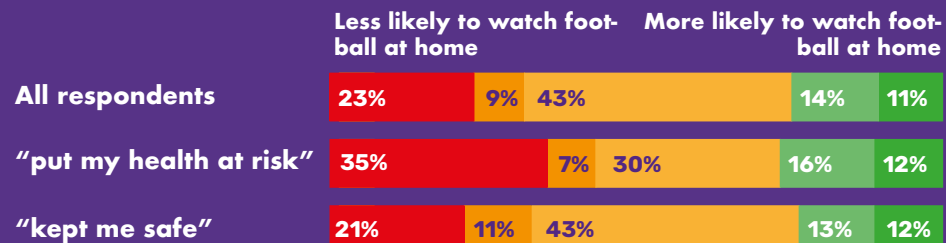
Has COVID-19 impacted your interest in football?



Has COVID-19 impacted your attendance at football matches?



Has COVID-19 impacted your enjoyment of football at home?



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