



SCOTTISH FOOTBALL SUPPORTERS SURVEY

THE RESULTS

2019/20

OUR GAME, ONE GOAL
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 second in a three-year benchmarking study – a partnership between SDSScotland, 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



3817 TOTAL PARTICIPANTS
86% describe themselves as "I am a massive fan of my club" or "I am a big fan of my club"
64% OF WHOM ARE SEASON TICKET HOLDERS

AVERAGE AGE:

U 16:	1%
16-24:	13%
25-34:	17%
35-44:	17%
45-54:	20%
55-64:	20%
65:	12%

Slightly older than 2018/19

GENDER



0.6% other



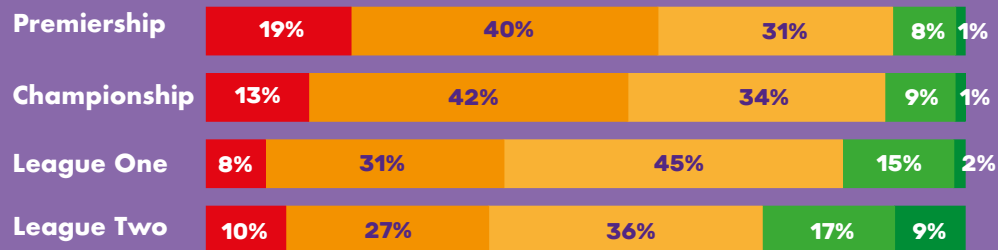
01. VALUE FOR MONEY



Overall the scores have declined in the last year, with the biggest change being the number scoring SPFL tickets as "very poor" value for money increasing from **12%** to **16%**.

League One and League Two fans are significantly more positive about Value For Money than fans of clubs in the Premiership and Championship.

PERCEPTION OF VALUE PER DIVISION



TOP 5 FACTORS AFFECTING ATTENDANCE



Rated the most important for the first time.



Ticket costs are important, but other things also contribute to a great matchday experience.

02. FAN ENGAGEMENT

64%

know that their club has an appointed SLO

96%

who have needed to contact an SLO have been able to do so

30/42

30 of Scotland's 42 senior clubs have an SLO

75% support some degree of supporter ownership, a further 22% would like to see a Structured Dialogue process at their club. Only 3% don't believe supporters should have any involvement in the governance of their club.



Most fans get information about their club from online sources. Half of fans who don't have a season ticket purchase match tickets online.



"Through the work of the SLO and the innovative use of social media and more traditional methods of communication we continue to enjoy a level of support despite the challenges faced by the game. The club offers a range of ticketing initiatives to encourage a more family-based approach and this has paid dividends in terms of building our support and community links."



CLUBS VIEWED AS BEST AT WORKING WITHIN THEIR COMMUNITY



+ an honourable mention for Stenhousemuir

Fans value the work their clubs do with wider causes...

"This has always been a community orientated club and this is something that's a part of this football club. We take great pride in our local community and this is something that will never change at Hamilton Academical F.C."



"In striving to become a hub for social and economic good, the club is proud of its relationship with Big Hearts and together has brought initiatives like The Changing Room, which promotes men's mental health, and the opening event of the 2019 Edinburgh International Festival, along with more than 35 community organisations and 15,000 people, to Tynecastle."



Community development is one of the most powerful ways that clubs can connect with fans, clubs working in their local community enrich the lives of people living there...



"We put our support base at the very heart of the club and through the work of our community team we use every opportunity to raise our profile and encourage youth at grass roots level to participate in the range of activities and indeed to travel to our home and away matches."



"We are a professional club with the community at its heart. The club has a 3 year plan with a community engagement strategy running alongside it. The programme is overseen by the Chief Executive and strategically managed by two Football Development Officers. They are supported by a large team of part-time and volunteer coaches which enable the club to provide a pathway for life which reaches 10,000 people annually. The club allocates a budget to 'Warriors in the Community' and our staff work tirelessly to attract people into the programme and to obtain grants for the projects we run to help to make it self-sustainable."

Fans are proud to see local talent progressing all the way up the first team and into international football...



"With significant investment in our academy structure, in both boys and girls teams, we're delighted to see so many young players make their mark in our first team, and prospering at their loan clubs throughout the leagues."



"We are delighted to be recognised for our work in youth football. The club continues to work in this area and would like to acknowledge the hard work, commitment and dedication of all our youth coaches."

CLUBS VIEWED AS BEST AT DEVELOPING TALENTED YOUNG PLAYERS



+ an honourable mention for Queens Park

03. SUPPORTER EXPERIENCE

TOP 3 FACTORS AFFECTING OVERALL EXPERIENCE

ATMOSPHERE

CUSTOMER SERVICE

FACILITIES

BEST AWAY MATCH EXPERIENCE

HEARTS
HIBERNIAN
KILMARNOCK
ROSS COUNTY
CELTIC



+ an honourable mention for Brechin City

"Tynecastle Park is already famous for its atmosphere and the new Main Stand has not only retained the impressive matchday experience but also improved upon it."



"We pride ourselves in providing a high quality matchday experience which is built upon the cleanliness, safety, convenience, facilities and personal service on offer. The club understands and does not take for granted that many home and away fans travelling to Dingwall on a matchday have probably been involved in a significant journey to get here."



"Our season in the Championship saw us receive many kind comments from visiting fans – although that perhaps reflected an element of novelty around supporters of full-time clubs making something of an irregular visit to Glebe Park. We actively do our best to look after visiting fans and work hard to create a welcoming environment from the moment they arrive at the ground.

Apart from the fairly commonplace "tidy wee ground" comments, much of our feedback relates to the fine quality of our soup and our pies. In terms of the stadium, much is made of the option for fans to enjoy such close proximity to the action the pitch, the height of the David H Will Stand or the quaint old-fashioned Centre Stand. Although the ability to move around the ground largely unrestricted isn't unique at our level, our famous hedge certainly is!"

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



15%



60%

 **66%** of supporters believe their club provides adequate facilities for disabled supporters.

 **60%** are in favour of the reintroduction of alcohol sales within football stadia (down from a high of 73% in 2015)

 **88%** are in favour of safe standing (up from 77% in 2015)



Congratulations to Aberdeen FC! Since this survey was conducted, UEFA named them as "best professional club" in the 2019 UEFA Grassroots Awards.

Last season they held over 1700 community events, with more than 20,000 participants in those programmes.

This work would not be possible without the team of volunteers giving up their time to engage their communities in football. It is as enjoyable for these volunteers as it is for those taking part.

INCLUSIVITY AND DISCRIMINATION

Scottish football is an inclusive place for...

	AGREE	NEUTRAL	DISAGREE
Girls and women	60%	27%	13%
People of any race	64%	20%	16%
People with a disability	61%	30%	9%
People of any faith	47%	22%	31%
People of any sexual orientation	49%	29%	22%

But we still have a problem with discrimination...

	WITNESSED	BEEN SUBJECTED TO
Sectarianism	89%	50%
Racism	63%	8%
Physical abuse	57%	19%
Homophobia	50%	2%
Sexism	50%	3%
Disability	19%	2%

04. OTHER STATS



13%

of fans have attended women's league or international games



40%

would be more likely to attend if they knew when and where the game was on



32%

would be more likely to attend if there was better promotion from the media

55%

are proud to support Scotland

49%

being a Scotland fan is part of who they are

26%

Scotland games are about more than the result



90%

believe the Scottish Cup is 'our cup'

69%

believe the Scottish Cup is a great spectacle

THE FUTURE

27%

OPTIMISTIC

47%

PESSIMISTIC

"The annual Scottish Football Supporters survey has again provided invaluable insight on what matters most to the fans. These results will help the Scottish FA shape our focus as we strive to provide the best experience possible for supporters. We will continue to work with stakeholders to ensure that as many fans as possible can enjoy our national game."

Ian Maxwell, Scottish Football Association

"Insight like this is invaluable as we constantly look for new ways to improve the Scottish game and assist our member clubs in developing and growing the positive aspects of their own matchday experience. Almost 4.5 million supporters attended matches across all four divisions last season, a figure that pays testament to the work being done by the clubs to make Scottish football as attractive as possible to supporters."

Neil Doncaster, Scottish Professional Football League

"Once again, we have been able to engage a broad cross section of supporters from across the country in shaping our recommendations to clubs and the football authorities, and are keen to work with them to act on these insights. Competition is fierce on the field of play, but by collaborating and learning from each other in the stands, offices and boardrooms we can all work together to strengthen Scottish football."

Alan Russell, Supporters Direct Scotland

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