

CHANGING SUPPORTER PERCEPTIONS BETWEEN 2018 AND 2022



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

www.supporters-direct.scot

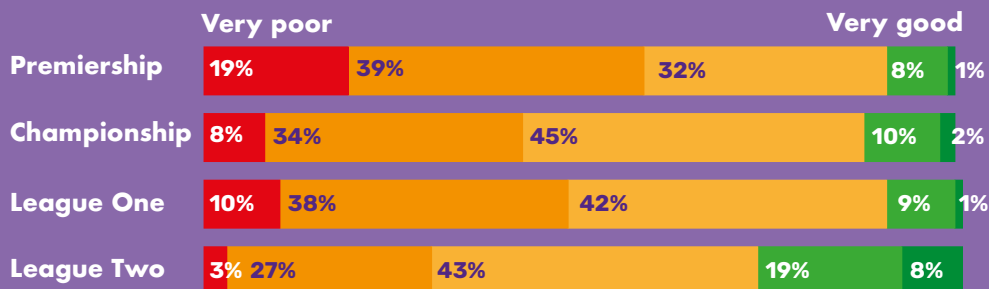


01. VALUE FOR MONEY

Supporters' perceptions of Value For Money show gradual improvements across the board, with responses from League Two fans significantly better than from those in the three higher divisions.



BREAKDOWN OF VALUE FOR MONEY SCORES ACROSS DIVISIONS:



02. FAN ENGAGEMENT

Clubs' communication with their fans is changing - website and email communications reach older fans well, and younger fans are more active on social media. Recently the reach of Facebook and Twitter has reduced, and clubs must continually find new routes to engage young fans.

Supporter Liaison Officers are well established in Scottish football, and play an important role as the conduit between clubs and fans. Fan ownership of clubs is also growing, with widespread recognition that some degree (outright ownership, majority control or minority representation) is desirable.

Fans that know that their club has an appointed SLO

52% in 2018/19

64% in 2019/20

70% in 2022/23

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

88% in 2018/19

96% in 2019/20

95% in 2022/23

This remains very high

Broad support from fans for some degree of supporter ownership at their club

79% in 2018/19

75% in 2019/20

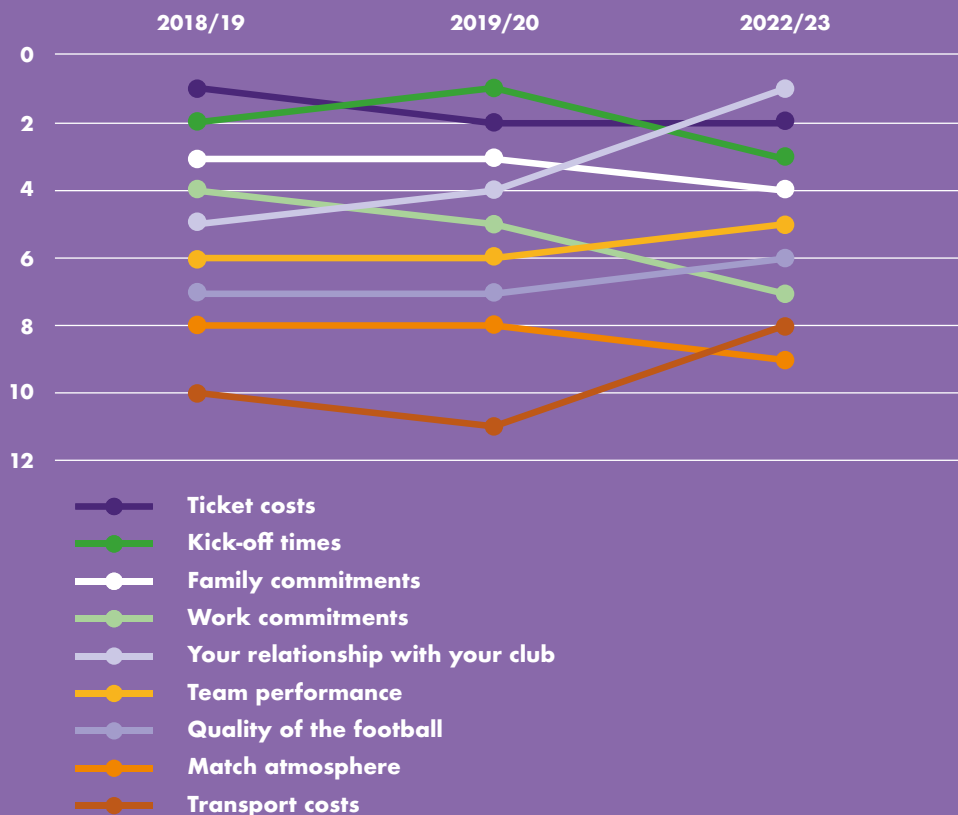
81% in 2022/23

03. SUPPORTER EXPERIENCE

Ticket costs and kick-off times are the most important factors affecting attendance, but post-pandemic they have been displaced by fans' perceptions of their relationship with their club. Transport costs have also become significantly more important to fans this year.

As we returned to stadiums post-pandemic, the things that make for a great matchday experience is exactly the same as in previous years - a great atmosphere, a warm welcome, and fan-friendly facilities.

THE CHANGING IMPORTANCE OF THE MAIN FACTORS AFFECTING ATTENDANCE:



04. OTHER INSIGHTS

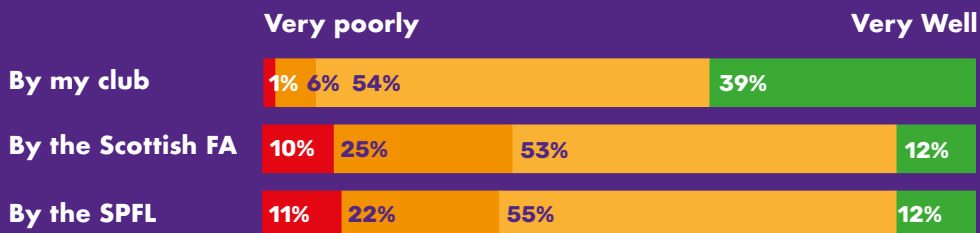


Fans' identification with the national team has improved significantly - improved results on the pitch, leading to qualification for Euro 2020 and the play-offs for World Cup 2022 has had a massive impact, and two-thirds of fans responding to the survey this year believe that being a Scotland fan is part of who they are - the highest level of response we have ever seen.

COVID-19

Clubs, the Scottish FA and the SPFL all did a good job of communicating COVID-19 restrictions and protection measures. Scottish football did a fantastic job of keeping us safe, but the pandemic has had a lasting effect on fans' relationship with football - some identify much more closely with their clubs and the game in general, but some have disengaged from the sport.

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



COVID-19 CONTINUED

We asked fans who attended football during the pandemic whether they felt that the restrictions and protection measures kept them safe, or whether they felt that attending football put their health at risk – and we see significant differences in the responses of these two groups to the other COVID-related questions:



In general, **19%** of fans are less interested in football following the pandemic and **35%** are more interested than before. But for those who felt that attending football put their health at risk, twice as many (**38%**) are still less interested in football post-pandemic.

In contrast, **44%** of those who felt that they were kept safe during the pandemic are more interested in football than before.

28% of all fans are less likely to attend football than before the pandemic – this figure rises to **55%** among those fans who felt at risk during COVID. Even among fans who felt that the protection measures kept them safe, **18%** are less likely to attend than before.

It appears that absence from football grounds has caused some fans' desire to attend games to intensify – **29%** report that they are more likely to attend post-pandemic, and this includes **13%** of those fans who felt at risk during the pandemic.

Demand for watching football at home has fallen for all fans, regardless of whether they felt that COVID protection measures kept them safe or not. **32%** of fans are less likely to watch football at home than those (**25%**) who say they are more likely to do so.



DISCRIMINATORY BEHAVIOUR

Discriminatory behaviour remains a serious problem in Scottish football, and is largely unchanged over the period of this benchmarking study.



Have you ever witnessed any of the following in and around football stadia in Scotland...

Have you ever been subjected to any of the following in and around football stadia in Scotland...



	WITNESSED	BEEN SUBJECTED TO
Sectarianism	85.2% in 2018/19	41.3% in 2018/19
	89% in 2019/20	50.4% in 2019/20
	88.6% in 2022/23	41.3% in 2022/23
Racism	57.6% in 2018/19	3.6% in 2018/19
	63.1% in 2019/20	8.2% in 2019/20
	56.4% in 2022/23	3.7% in 2022/23
Physical abuse	51.7% in 2018/19	16% in 2018/19
	56.9% in 2019/20	18.5% in 2019/20
	56% in 2022/23	17.6% in 2022/23
Homophobia	50.5% in 2018/19	2.5% in 2018/19
	50.5% in 2019/20	2.3% in 2019/20
	51.2% in 2022/23	3.1% in 2022/23
Sexism	47.9% in 2018/19	3.8% in 2018/19
	50.1% in 2019/20	3.8% in 2019/20
	44.3% in 2022/23	3.1% in 2022/23
Disability	16.7% in 2018/19	1.8% in 2018/19
	18.9% in 2019/20	2.2% in 2019/20
	14% in 2022/23	2.2% in 2022/23

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Email: info@supporters-direct.scot

Tel: 01324 323 282



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