



THE BUSINESS OF
FANS

Women in Football



Women in Football

Research Report 2018/19



SCOTTISH FOOTBALL
Supporters Association

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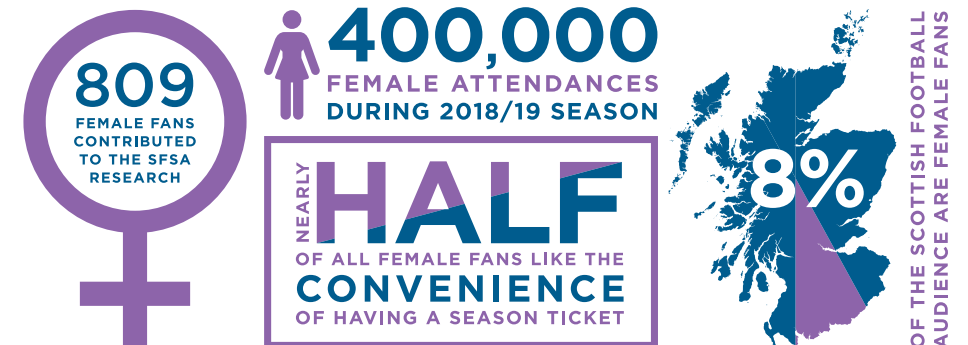


1.0 The SFSA and our role in this research

The Scottish Football Supporters Association (SFSA) is the national football supporter's umbrella group representing fans of all Scottish clubs. It is the only independent fans' body with representation at Football Supporters Europe (see www.fanseurope.org). SFSA has 71,000 members across three categories: individual fans, fan groups and affiliates. It is well placed to support and deliver innovative programmes that can use the power of football to enhance the community. The organisation is a volunteer-run, not for profit social enterprise and is a Community Interest Company registered in Scotland. See www.scottishfsa.org.

SFSA has knowledge and experience of the structure and organisation of fans' groups across the UK and in Europe. We have consulted widely with many football clubs, supporters groups, the Scottish Government as well as across the political parties in Scotland on behalf of fans. We have working relationships with both the SFA and the SPFL where SFSA seeks to be a 'critical friend'. The organisation believes that the success of football as our national game rests with the participation and the contribution of supporters, and that there is a need for them to have an independent collective influence within the game.

There is no doubt that female fans are now a significant and growing part of the football audience for the men's game (as well as the growing and successful women's game) and that this warrants further research to see if an emerging market sector can be better understood. Utilising our membership data and previous research we have moved proactively to explore this further.





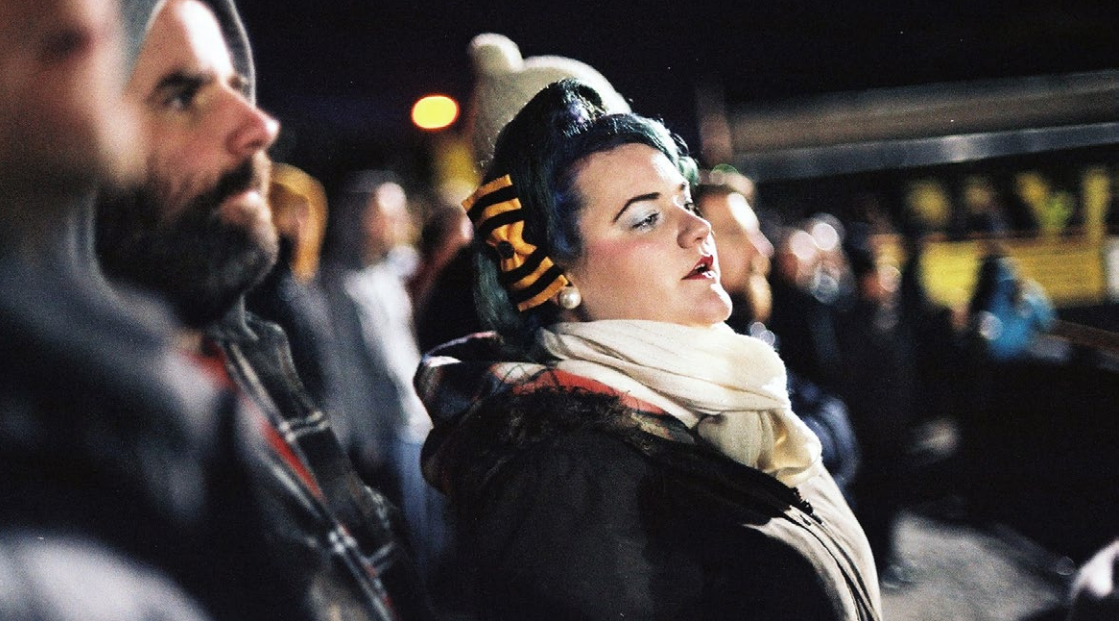
2.0 Why are we are conducting this research?

The historical context and the football environment

Glance through the photo archives of any of our national newspapers and you will be hard pressed to find many women fans in the throngs of spectators huddled together for warmth in the massed ranks or the swaying terracing. In the black and white era, seeing women at professional football matches was rare. The stadiums were cold, dark, miserable sporting bowls with primitive facilities that made them less than welcoming for women. By the time we reached the 1970's we entered the days of hooligans fighting every week and effectively taking over football. Casting our mind back to the human tragedy at Hillsborough should remind us that fencing used to be common place at football grounds across the UK, as a consequence of the hooligan behaviour of spectators. Following the Hillsborough disaster, the Taylor Report precipitated a radical move: the provision of all-seater stadia that dramatically changed the environment for watching football. This in itself had a significant role to play in changing fan behaviours, as did the change in the highly changed political landscape post the miners' strike and poll tax protests. As society moved on, the 'football casual' culture diminished, and the memory of recent disasters such as Ibrox and Bradford made way for a more positive, modern environment.

The changing demographic

The growth of new audiences – not least women and girls playing and watching football and the development of a community focus at clubs have played a significant role in moving the football audience away from its historical origins of male dominated heavy industry. The growth of television football has also had an impact on the socio-economic profile of football fans. With the changing landscape and the unprecedented rise of girls and women participating in football, the natural consequence has been a rise in women watching as well as participating in the game. There is, without question, a major shift in the football audience that mirrors the change in social, cultural and economic factors, with the move being towards a more cross-class game. There is no doubt that the glamorisation of the game through the Beckham to Ronaldo eras has also had an impact in making the game more accessible to a wider demographic across the sexes. Even more important from the perspective of women is exploring the changing family dynamic, which previously saw fathers take sons to watch football, but not daughters. This is changing, with men and women taking their daughters to matches. A number of other factors also come into play, e.g. safer and better equipped stadiums, improved facilities, improved behaviour and gender bias awareness.



3.0 The process for finding information

The SFSA directly approached members and non-members to help with our research. SFSA Board director Alana Watson, a marketing specialist, conducted an online Focus Group. Inverness Caley Thistle, Rangers, Hearts, Aberdeen, Celtic, Ross County, Partick Thistle and Hibs female fans participated in the discussion, where we reviewed the questions we should ask in the first ever survey of women across the Scottish game. Alana also met with Partick Thistle to look at the work they have done with their own female fans. She also discussed it with the SFA.

The SFSA then briefed Fan Q, our academic and business partners, to conduct a methodologically solid survey on our behalf. Our original brief, we now realise, was probably too tight given how large this topic is and the huge growth in women's involvement in football. What was not tackled, but which will be looked at in future, is the crossover into women playing the game and the structures around this. The focus here is on women in the men's game.

4.0 What we know already

Through our membership and the pioneering national benchmarking and evaluation research we conducted in winter 2017, we now know that 8% of the Scottish football audience are women.

If we use our standard audience segmentation we can see major differences between male and female audiences in how they consume their football.

Our typology, arising from the benchmarking survey, has proved durable. It forms the basis of a loyalty ladder with those at the top contributing the most revenue to the football business. Further research in this area is currently being commissioned by the SFSA and will also look at the lifetime value of the different fan types to the clubs.

5.0 Fan Demographics

Football Die Hard

Female: 9% Male: 14%

Never misses a game, home or away, if they can help it. Without doubt the most loyal of all fans. They would not miss a game, except in extreme circumstances (serious family illness, bereavement etc.) or unless cost prohibits it.

Action: We believe that this is a sector that is diminishing, and in our research we have found fewer of these fans than we might have historically expected. There is no doubt that the broadcasting of games has had an impact on the number travelling in the Premiership, for example.

Rationale: Fewer female than male fans are committed to the weekly dedication of following the team home and away. This is probably no surprise, given that die-hard football club loyalty is a relatively new phenomenon for women.

Committed Regular

Female: 49% Male: 37%

This is a season ticket holder who, unlike the diehard, does not need to attend every game. They take in the occasional “local” away match. For example, if you are a Motherwell fan you might go to see them at Hamilton Accies or Kilmarnock, but a trip to Dundee might be deemed too far.

Action: The key with this group is to ensure that they don’t drop down the ladder to become a Committed Occasional, as this will change the revenue earned for the club from being guaranteed to probable or possible income.

Rationale: Nearly 50% of female football fans in Scotland have season tickets, which indicates that they are very comfortable attending matches, loyal to their club and happy to make a long-term financial commitment to the club.

Committed Occasional

Female: 20% Male: 27%

This fan goes to around half the home games, or maybe less; but not enough to merit buying a season ticket at the club he or she loves. They would like to go to more games, but other commitments such as family, work or finance mean this is not possible.

Action: These are the fans that football clubs should try to convert to buy a season ticket, as they are the most likely to transition into becoming a Committed Regular. More often than not, these fans will once have been a Committed Regular but they have fallen down the loyalty ladder.

Rationale: This is still a sizeable portion of the female audience and they would see themselves as important fans, but it is significantly less than the male %.

Historical Occasional

Female: 3% Male: 6%

Has always been a fan but only manages to attend a few games a season. They have dropped down the loyalty ladder and subsequently the income they give to the club has diminished. A very dangerous category to have fans (from the point of view of retention), in as they can quite easily fall away completely and become Lapsed Lovers.

Action: Tend to be ‘fickle fans’, who find it easy to do other things on a Saturday and where football is now just part of a repertoire of things they do rather than being their core weekend activity. Bespoke offers and maybe ancillary purchases could be explored alongside suggestions such as hospitality packages for special birthdays, etc.

Rationale: This category is for someone who is a fan, but one who just can’t go very often, usually due to distance, work commitments, financial constraints or family activities. The male/female difference in results could be related to the fact that traditionally women have not attended football matches.

5.0 Fan Demographics (cont.)

Walk-in or Visitor to the Area

Female: 9%

Male: 3%

Loves football, and is just looking for a game in the area or a place they are visiting. These fans were much more prevalent in the halcyon days of the 1950s through to the early 1980s. Now, however, they are very rare, and many of the futile marketing campaigns seen across the county are aimed at this market segment – when they should be looking at others further up the “loyalty ladder”.

Action: Make the club as welcoming as possible with online guides and maybe a new fan guide reminding people that Scotland is a 365-day a year tourist destination.

Rationale: Surprising that there are considerably more women in this category than men. We suspect it is they are acting as a family organiser for days away, holidays, etc – whereas the men have a more ‘club/historical’ interest. More reflection is needed.

Distant Lover

Female: 8%

Male: 6%

Exiled fans that don’t get to matches as often as they would like. Through time the passion wanes and this sector becomes the hardest to keep onside. Those who do stay loyal will make the effort for special occasions such as Cup Finals but are the primary audience for online broadcast consumption.

Action: They can come along a few times a season for big matches, but you are limited to what financial value you can gain from them. The Internet and social media have helped a little, but it is hard to do much in this sector to increase revenue for clubs.

Rationale: Similar to the scores for men, but one member recently said to us: “I have been a distant lover for four years, having started during my last pregnancy and bringing up my daughter. Not sure when I can ever go back.”

Armchair Fan

Female: 3%

Male: 6%

These fans only watch games on TV. They are most likely to have previously occupied a place higher up the loyalty ladder, but dropped right off the attendance spectrum altogether. They have got out of the habit of going to matches. Circumstances such as taking up other sports, having family commitments, major changes at the club (or indeed a general dissatisfaction with the game they used to love) takes them to the TV screen only. From the League’s perspective the simple message is that you can’t have it both ways, and if fans drop off the loyalty ladder you just need to be thankful that they still buy a Sky or BT subscription. Of course, there is a danger that these people’s loyalty to Scottish football will decline as they expand horizons through watching the more glamorous Spanish and English leagues.

Action: Keep them engaged with either a league wide campaign with a discount scheme for those who have BT/SKY subscriptions. Show your bill and get money off our next home game?

Rationale: It appears that women mostly become armchair fans during major tournaments like the World Cup and significant games like Cup Finals – they are too busy and there are too many games on, too!

Lapsed Lover

Female: 1%

Male: 3%

They used to watch their team and can be encouraged out for big occasions such as cup finals, play offs or unique events (testimonials or celebratory events relating to past glories) but apart from that you will never see them. When they die off the family connections are often lost. The family’s historical link is broken and can’t be reclaimed.

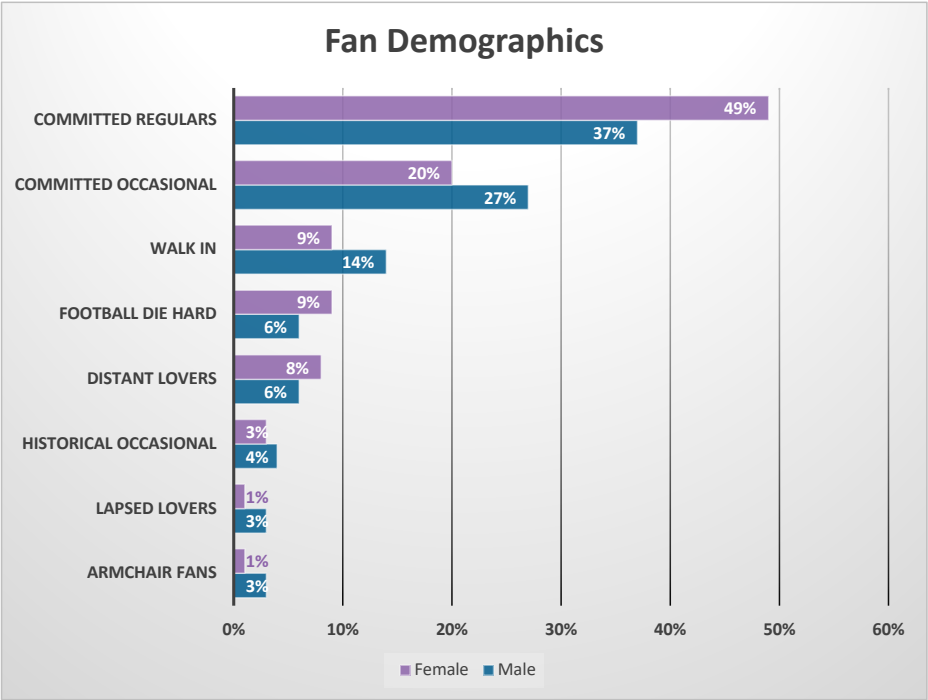
Action: Very little should be done given the size of the audience.

Rationale: We believe that as the female fan is a newer phenomenon, there are simply fewer fans in this category.

5.2 Data

Comparing the audiences

	Female	Male
Football Die Hard	9%	14%
Committed Regulars	49%	37%
Committed occasional	20%	27%
Walk in	9%	3%
Historical occasional	3%	6%
Distant Lovers	8%	6%
Armchair Fans	1%	4%
Lapsed Lovers	1%	3%



5.3 Conclusions

Our conclusions from our existing data, gathered when members join...

The concerns:

- There is little central resource to maximise the opportunity for engagement with fans, either within the SFA/SPFL or at clubs.
- Given the tribal nature of football supporters, there are many dangers in having to open up sections of the ground to ‘ultras’ to create atmosphere – this might also encourage less appropriate behaviour. There is much less appeal in these areas for women and families.
- Maternity and being a homemaker (still a role women predominate in, despite moves away from a rigid gender-allocating and sexist culture) can make sweeping changes – from being a Football Diehard or Committed Regular to being an Armchair Fan of Lapsed Lover. The longer you are away from the game, the less likely are you to go back. That is the reality.

What can we do?

- Benchmark year-on-year to monitor changes
- Look at the spectator crossover to the women’s game
- Monetise the value of the female fan in the men’s game
- Look at wider family relationships and how they could be maximised to enhance the game
- Look at crossover to the SYFA to provide a welcoming platform for girls playing the game to become avid spectators of both the men’s and women’s game
- Look at bespoke marketing workshops to develop the female fan audience
- Offer clubs the opportunity to utilise the segmentation model when they are doing their own research to allow club by club comparisons and benchmarking against the national average
- Challenge the sexist attitudes, language and culture that can still exist in the men’s game.
- Above all, listen to women fans and what they want. Our survey is the beginning, not the end of this research. It is a continuous process.



6.0 Research Outputs

The online survey (CAWI) took place between the 21st of August and the 16th September 2018. In total 816 female fans took part in the survey which was a very strong response from this sector.

Our survey again asked for the self-classification as a fan, with quite different results than in chapter 5.0, showing that the participants are mostly “Football Die-hards” (40%) and fans with “Regular Commitment” (35,7%), followed by “Occasional Commitment” (14,8%) and the small groups of “Lapsed Lovers” (3,0%), “Historical Occasional” (2,2%), “Armchair Fans” (1,6%), “Distant Lovers” (1,5%) and “Walk-ins” (1,1%).

65.2% of the participants are 25 - 54 years old. 59.2% of participants are full-time employed and 45% are married, whereas 42% are single.

56.2% state that they visited all home games of their supported club. Combined with the 20.6% that visited more than half of all home games, it once again shows the high commitment of the participants. 11.8% even attended all away games, whereas 18.9% did not attend a single away game. Twitter (32.4%) and Facebook (26.7%) are the most frequently used channels to keep up to date with team news, followed by the club’s website 26.4%.

Astonishingly the social media platform Instagram is the least used channel with 1.8%. Most participants interact daily (39.6%) or weekly (25%) with their clubs media channels, though 13.4% never interact with any media channels.

The questions in the “SFSA Female Fan Survey 2018” were heavily skewed towards the feelings of safety at the different stages of a stadium visit on a match day as this was highlighted in our Focus Groups as being one of the main areas that our group felt might stop new female fans attending games.

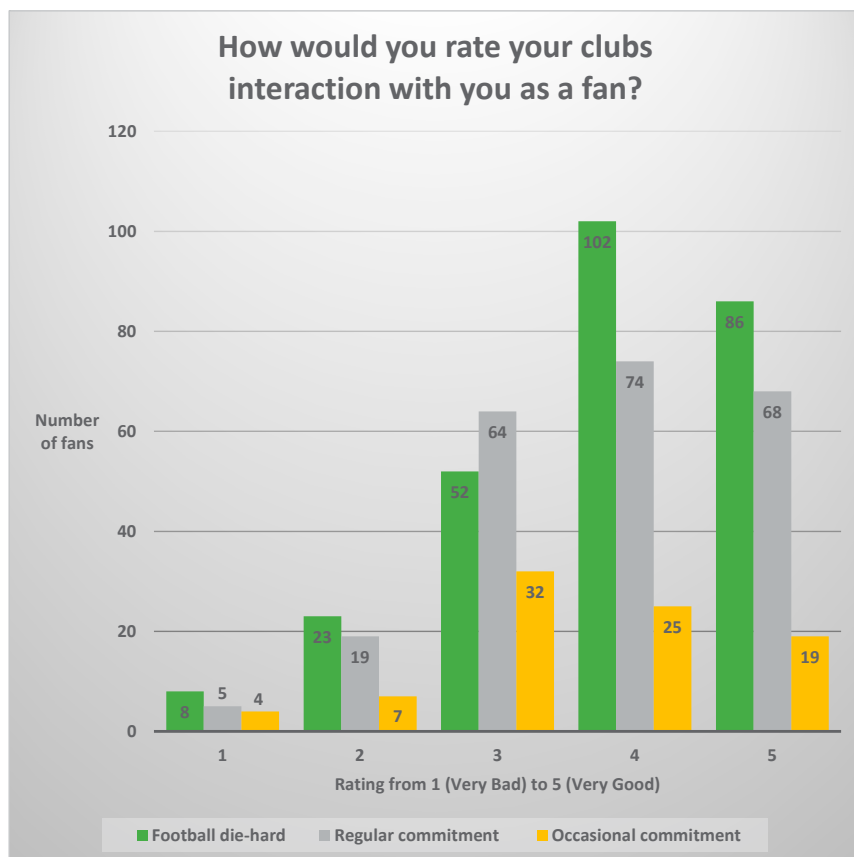
A gratifying result of the study is that ratings of safety around a stadium visit are much better than their reputation – female fans on average rate their feeling of safety in almost every context with very good ratings. The means for the different places in the stadium were all higher than 4.0.

The worst ratings are given in a context not connected to football, but to the general public, in detail to the infrastructure outside the stadium (e.g. public transport, parking spaces). Here is the most upside potential, although the average rating is already good with an overall mean of 4.03. Furthermore, the infrastructure inside the stadium is also rated a little lower than the rest with a score of 4.21. Fans who identify themselves as football die-hards always feel a little safer than the fans who were regularly committed. On top of that, the fans who identify themselves as regular committed feel a little safer than the ones who chose the answer occasional commitment.

You can see this theme in the results of the other questions as well. Female fans who are “bigger” fans in relation to the other participants gave higher scores compared to the others. For example, the interaction from the clubs with the fans is overall rated with a mean of 3.74. The separated mean of the football die-hards is 3.87, the mean of the group regular commitment is 3,79 and the mean of the group occasional commitment is 3.55.

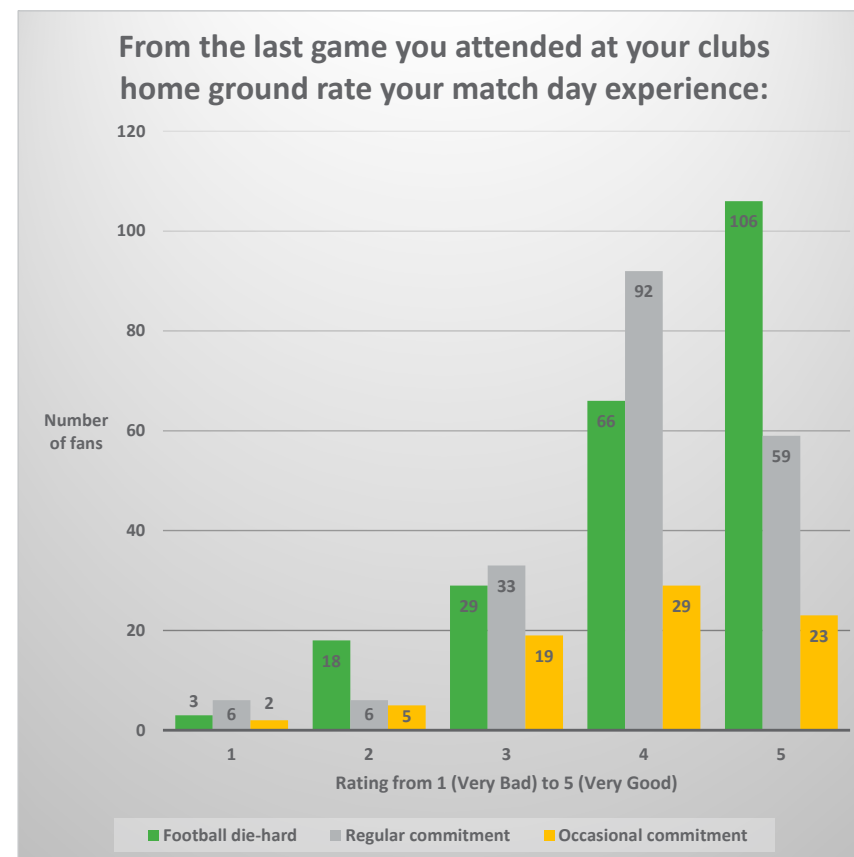
This trend continues in the following. When asked about the last home ground match experience, the group of football die-hards answered with a mean of 4.14, the highest mean of all groups, followed by “regular commitment” (3.98) and “occasional commitment” (3.99), summing up to an overall mean of 3.99.

Thanks to Matthias Gillet of Fan Q for compiling this research.



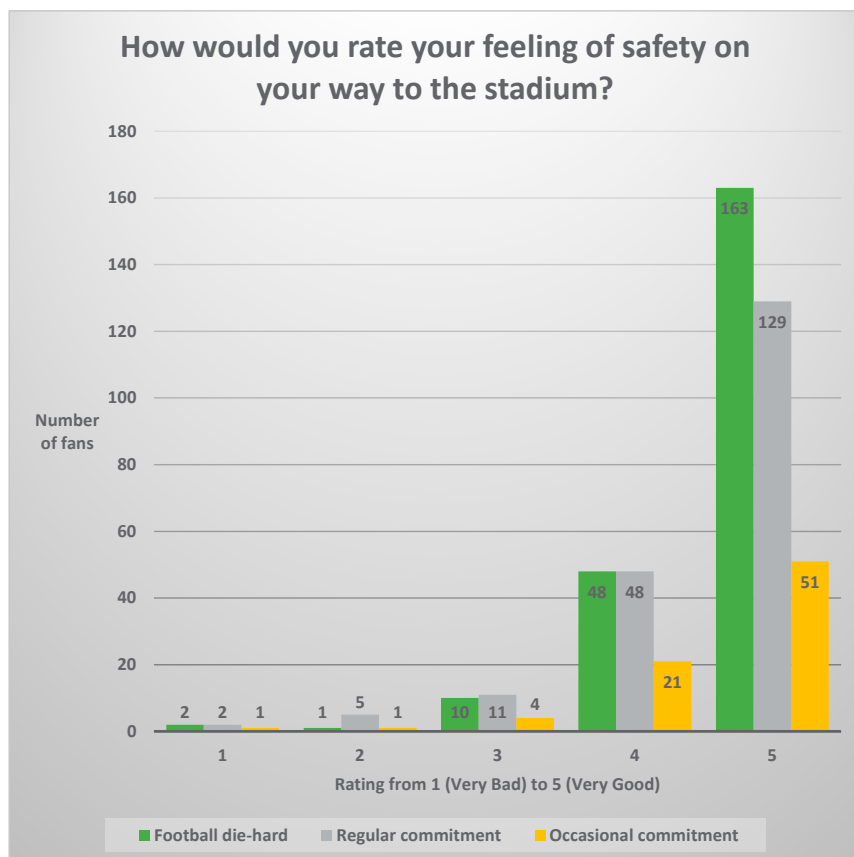
Type of fan	Mean	N
Football die-hard	3,87	271
Regular commitment	3,79	230
Occasional commitment	3,55	87
Overall:	3,74	588

- Overall result:**
- The overall mean presents a rating of 3,74 points out of 5 points.
 - The football die-hard fans rate the club's interactions with 3,87 points out of 5 points.
 - Fans with regular commitment rate the club's interaction with 3,79 points out of 5 points.



Type of fan	Mean	N
Football die-hard	4,14	222
Regular commitment	3,98	196
Occasional commitment	3,85	78
Overall:	3,99	496

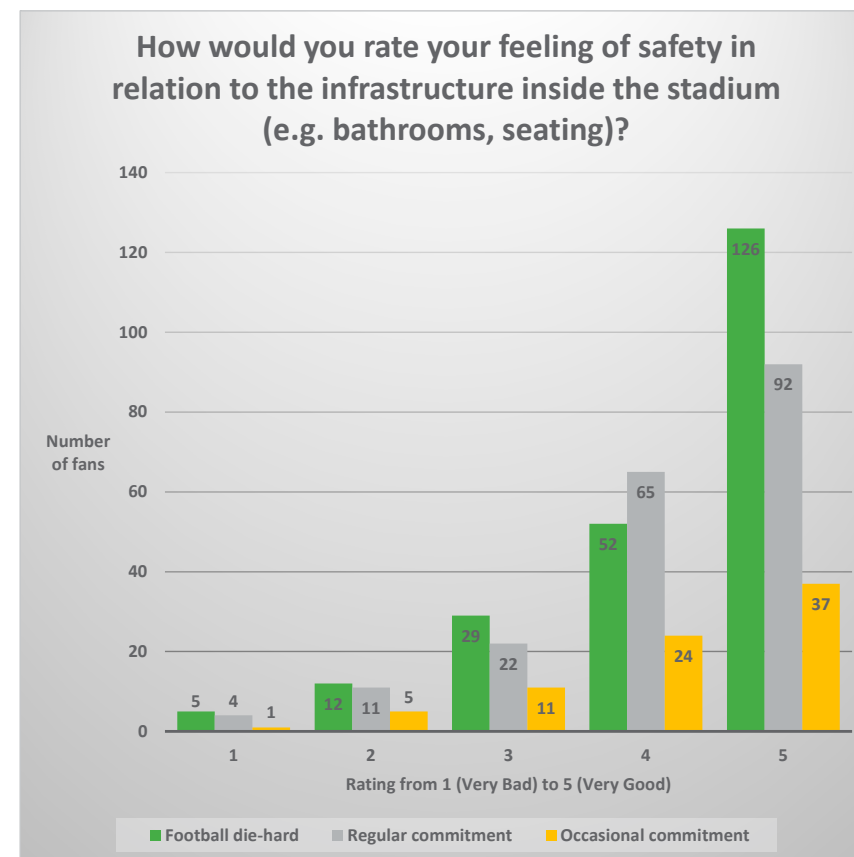
- Overall result:**
- The football die-hard fans rate their match day experiences with 4,14 out of 5 points.
 - Fans with regular commitment vote their match day experiences with 3,98 points out of 5 points.



Type of fan	Mean	N
Football die-hard	4,65	224
Regular commitment	4,52	195
Occasional commitment	4,51	78
Overall:	4,56	497

Overall result:

- The football die-hard fans rate their feeling of safety on the way to the stadium with 4,65 points out of 5 points.
- Fans with regular commitment rate their feeling of safety with 4,52 points out of 5 points.

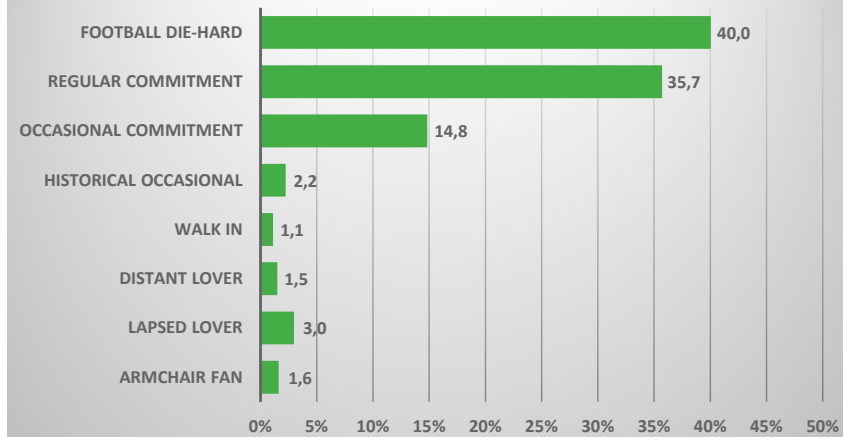


Type of fan	Mean	N
Football die-hard	4,26	224
Regular commitment	4,19	194
Occasional commitment	4,17	78
Overall:	4,21	496

Overall result:

- The overall mean presents a rating of 4,21 points out of 5 points.
- The football die-hard fans rate their feeling of safety regarding to the infrastructure inside the stadium with 4,26 points out of 5 points.
- Fans with occasional commitment rate it with 4,17 points out of 5 points.

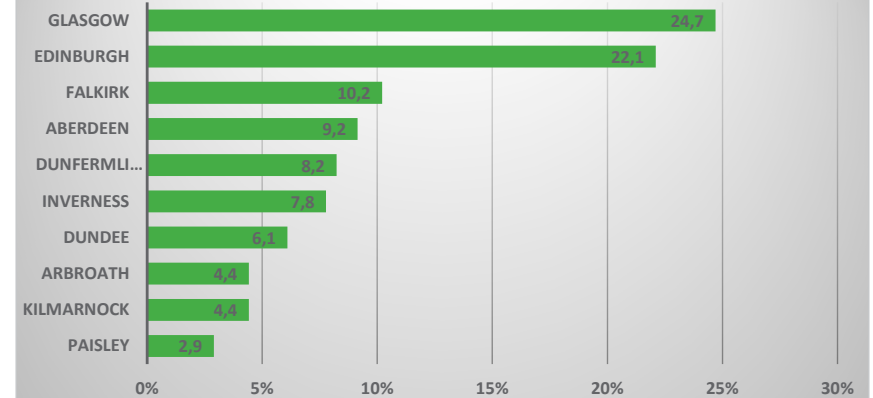
What type of fan are you?



Overall result:

- 40% of participants are football die-hard fans.
- Over 35% of participants are fans with regular commitment.

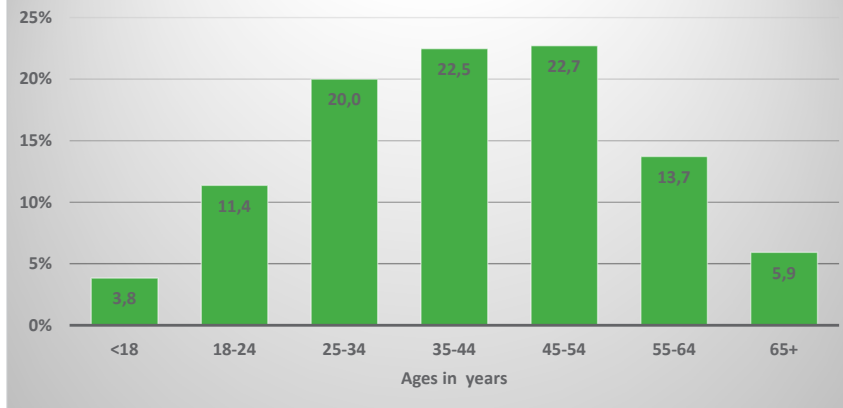
Home city



Overall result:

- 24,7% of participants are from Glasgow.
- 22,1% of participants are from Edinburgh.

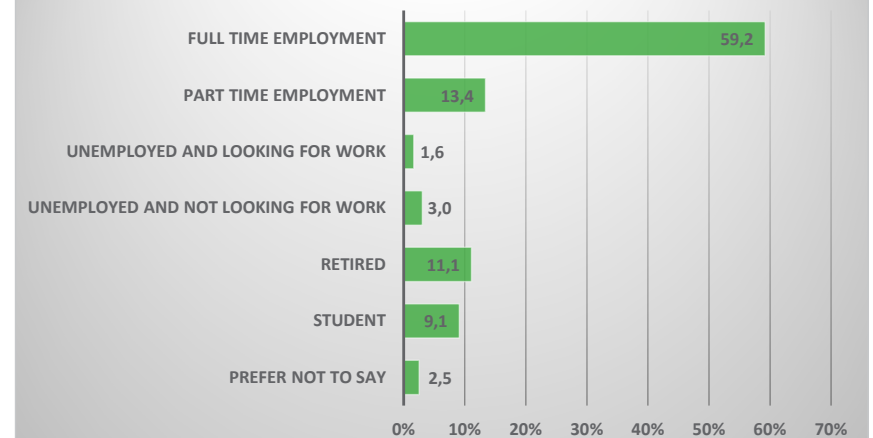
Age



Overall result:

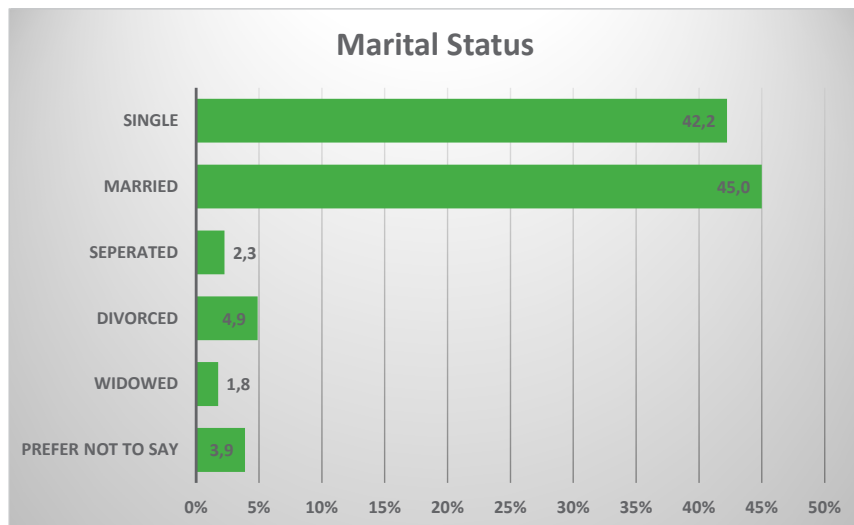
- 22,5% of participants are between 35 and 44 years old.
- 65,2% of participants are between 25 and 54 years old.

Work Status



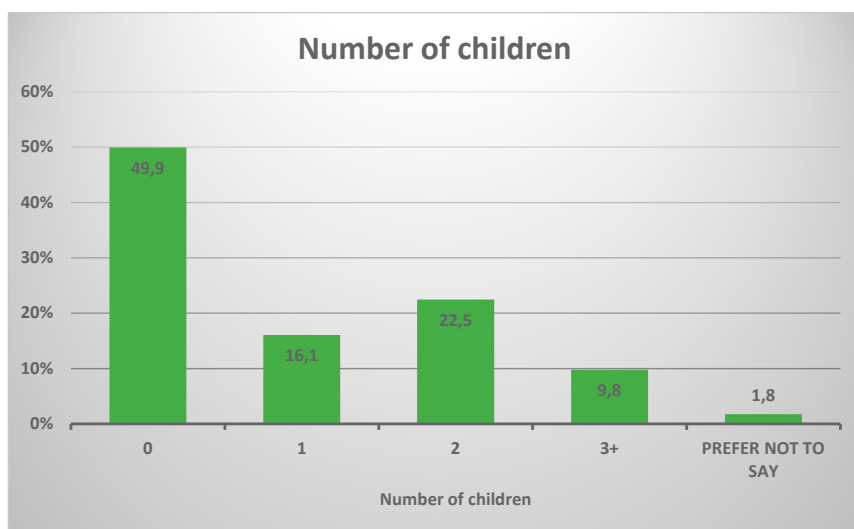
Overall result:

- 59,2% of participants have a full time employment.



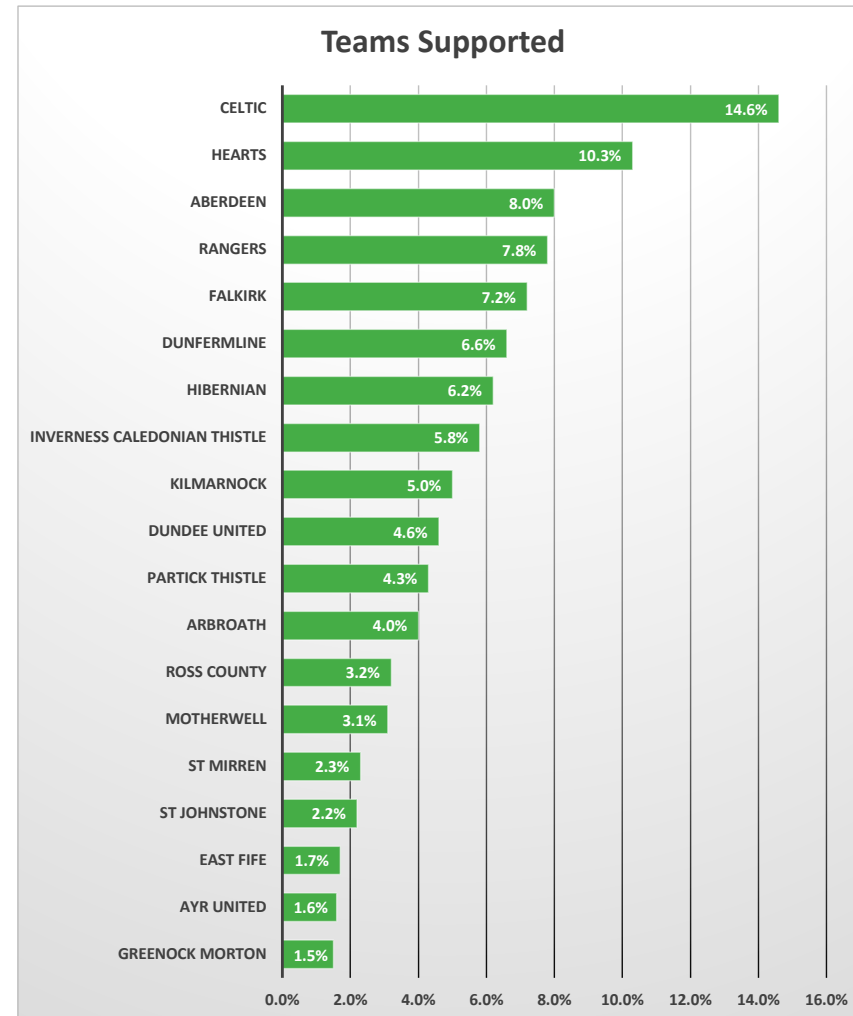
Overall result:

- 45% of participants are married.



Overall result:

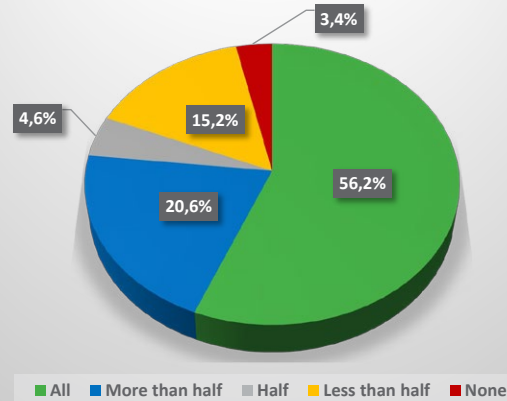
- 49.9% of participants have no children.
- 9.8% of participants have 3 children or more.



Overall result:

- 14.6% of participants are fans of Celtic
- 10.3% of participants are fans of Hearts
- 8% of participants are fans of Aberdeen

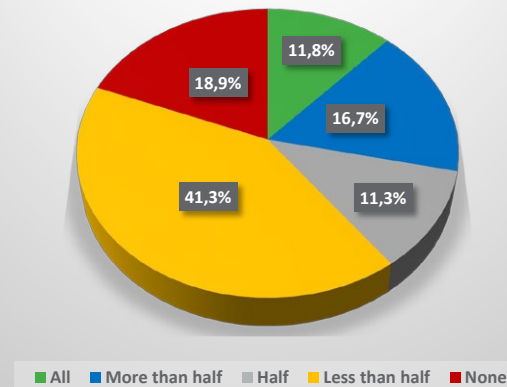
How many home games do you attend on average per season?



Overall result:

- 56,2% of fans visited all home games.
- 20,6% of participants attend more than half of all home games.

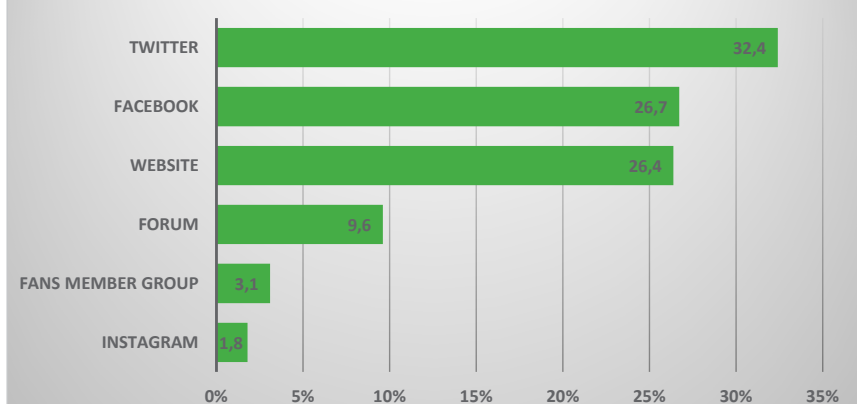
How many away games do you attend on average per season?



Overall result:

- 11,8% of participants have attended all away games of their supported club.
- 18,9% of participants have not attended any away game of their club.

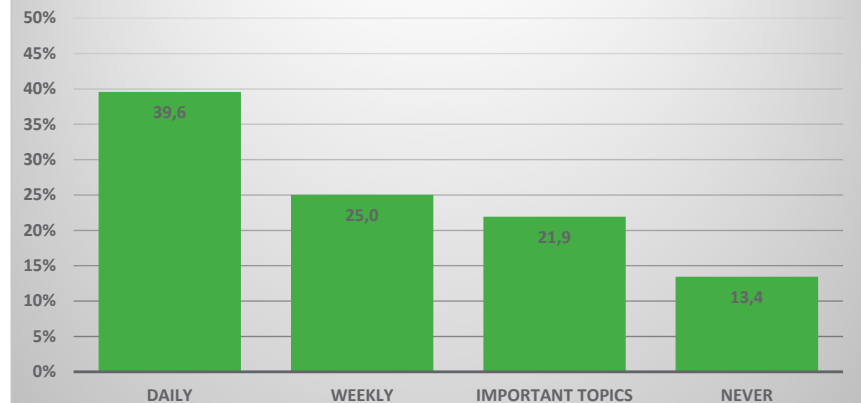
How do you keep up to date with your supported teams news?



Overall result:

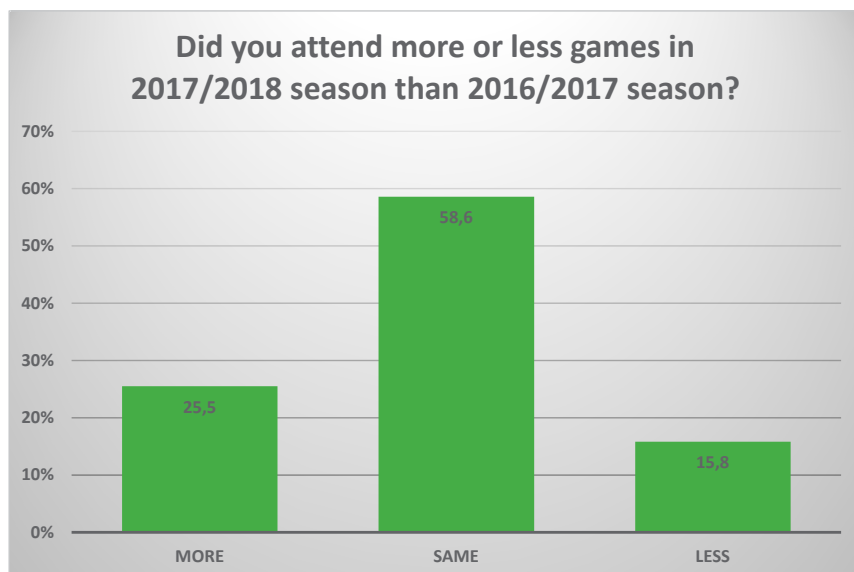
- 32,4% of participants use Twitter to keep up to date with their supported team.
- Instagram occupies the last place with less than 2%.

How often do you interact with your clubs media channels?



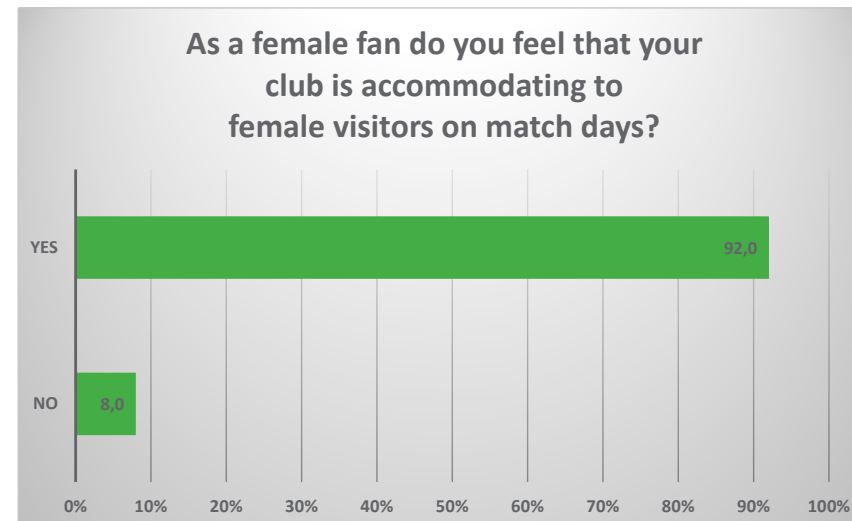
Overall result:

- Nearly 40% of participants interact daily with their clubs media channels.
- Interesting: Over 13% of the respondents never interact with their clubs media channels.



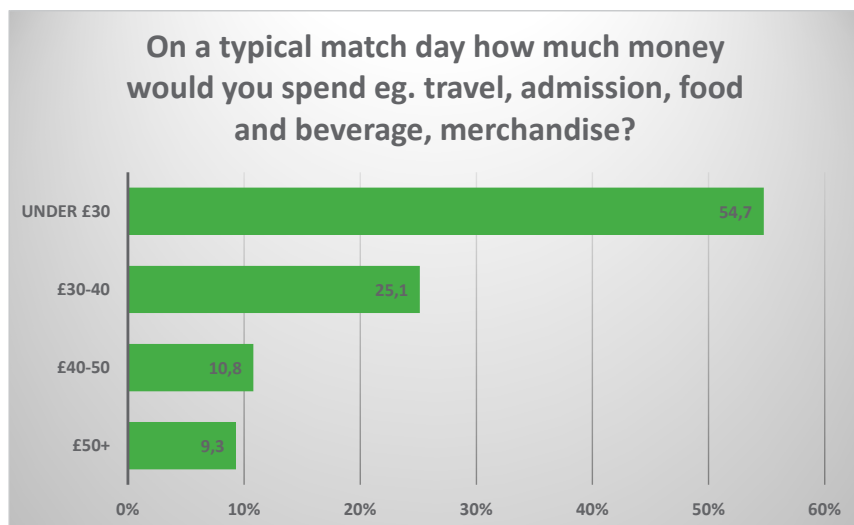
Overall results:

- In the season of 2017/2018 25,5% of participants attended more games than in the season before.



Overall results:

- 92% of the fans are happy with the accommodating to female visitors on match days?



Overall results:

- Over 54% spend under £30 on a typical match day.
- Only 9,3% spend more than £50 on a typical match day.



SCOTTISH FOOTBALL
Supporters Association

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Join us at www.scottishfsa.org.