



THE UNIVERSITY *of* EDINBURGH
Academy of Sport



**Scottish Women's
Premier League**

Club Days at Scottish Women's Football:

SWPL Fan Engagement Report.¹

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EXECUTIVE SUMMARY: SWPL FAN ENGAGEMENT REPORT⁴

The *Club Days at Scottish Women's Football* identifies who the fans are and what they want.

The report provides an up-to-date insight into key trends in women's football outside of Scotland. In both cases the message is one of positive growth.

The Scottish Women's Premier League (SWPL) was formed in 2022, when the clubs playing in the existing top two leagues decided to move the ownership and operation of elite competitions into a new structure.

The creation of the SWPL has helped to further accelerate the professional development and opportunities for women and girls in Scottish football.

¹ We are grateful for the support and co-operation given to this study from The Scottish Women's Premier League (SWPL), The Scottish Football Association and The Scottish Women's Premier League Clubs.

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⁴ 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 fan's needs.

The report helps to reduce a data gap between men and women's football in Scotland while acknowledging that a lot more needs to be done.

Commenting on the report, Fiona McIntyre, SWPL Managing Director said:

"We are really grateful to the University of Edinburgh for undertaking this study and providing us with a greater understanding of who is attending SWPL matches and importantly, what matters to them. The findings are incredibly encouraging as they point to a growing and engaged SWPL fanbase who are very satisfied with their matchday experience and enjoy the atmosphere at SWPL matches. Our aim is to increase attendances across the leagues, so the insights gleaned from this study are invaluable as we seek to deliver against that objective, through maximizing the visibility of the SWPL, ensuring our game remains accessible, improving the matchday experience and engaging with fans of the SWPL."

There is a growing positive sentiment towards both the SWPL and women's club football in Scotland.

Attendances are up, commercialisation is up and the positive sentiment towards women's club football is significantly higher in 2024 than it was in 2021.

During the 2022/2023 season the total distribution to SWPL clubs amounted to £344k, a 400% increase on the 2021/2022 season⁵. This continued to grow in the 2023/2024 Season with record distributions of £389,000. UEFA have announced an additional 1 billion (euros) for the 2024-30 cycle.

Gaps still exist when compared to other countries. As of May 2021, 81% of the players in French women's football earned their primary income from football which compares with 85% in Italy, 91% in England and 100% in Spain.

The transfer value of women players continues to grow with Chelsea having agreed a record deal in the region of £900,000. The increased professionalisation of the Scottish game has the opportunity to balance optimal revenue and visibility from the export and import of players.

Retail and sponsorship are key earners for the top women's clubs. Fans recognise the opportunity for increased merchandising around women's football in Scotland both inside and outside of the stadium.

It is important for Scotland to be able to benchmark the development of the pro-leagues against the development of other pro-leagues. To that end, the SWPL's involvement in the Women's World League Forum, via Managing Director Fiona McIntyre's position on the Board, is invaluable as this provides access to an annual benchmarking report on women's leagues around the world.

A fifth of SWPL Clubs have increased their average attendance by more than 50% during season 2023-24.

⁵ The actual increased value of the SWPL to clubs is likely to be higher exceeds as the SWPL centrally pays for match officials, insurances, analysis software and match balls which are worth £250-£300k to clubs

The record attendance for a Scottish women's club match is currently 15,822 and 18,555 for the Scottish Women's National Team.

Women's football in Scotland is consumed by a solidly middle-class audience, something that is also reflected in support for the women's national team.

More than 2 million people watched the SWPL on television or online during the 2023-24 season. The most recent data for the current season also points to that number rising significantly in the current 2024/2025 season.

Online engagement is more than 50% higher in 2024 than it was in 2021.

Winning is important but it is not the only or even the main reason for attendance.

77% of fans reported that they enjoy the atmosphere. 83% of respondents reported high satisfaction levels of the match day experience at their club for SWPL matches. 87% reported that sharing the experience with family or friends was equally, more or much more important than winning.

Creating a positive match atmosphere in the stadium is vital. Whether it be in stands or online SWPL fans expect an experience. The different tiers of hospitality that support elite football in Scotland have still to fully impact upon SWPL matches.

Increased visibility comes in many forms and needs to be supported in a number of ways until the women's game in Scotland is more self-sustaining. Women's and Girls football in Scotland needs to be given time to grow crowds at the professional elite level.

Having and feeling a sense of place or the ground being our home is an important part of fandom. 71% believe a lot and a great deal that SWPL clubs give fans a sense of belonging but the sense of place at club level is not as strong as it is at national level.

A successful national team can do a lot to raise awareness amongst people wanting to engage with the game and coming to support local teams.

Elite women's football in Scotland has become increasingly international as the game has professionalised. Both women and men's football in Scotland is a soft power asset that has still to be fully grasped by Scotland.

University of Edinburgh Professor Grant Jarvie, who led the research commented:

"It is great to be able to support the SWPL and the Scottish football industry with our data driven reports. We wanted to help the SWPL understand its fan base more. We also wanted to contribute to reducing a data inequality gap between women and men's football. Both are crucial to the growth of Scottish women's elite football in Scotland. The co-operation has been fantastic. I hope that our reports, this being our 10th, have helped to evidence who and what Scottish fans today are and want. Yes, more needs to be done but football is a real asset that Scotland can and should make more of"

Who are the Fans?

- 93% identified as white British which is 3% smaller than the Scottish national average.
- 64% held a college, university, or post-graduate degree.
- The majority of fans reported a household income of above 20k per annum. More than 10% reported household income of between 90 and 100k. 47% had a household income above 50K.
- 55% of the fans were female and 42% were male. 1% preferred not to say and 2% identified as non-binary or third gender.
- Women's football in Scotland is consumed by a solidly middle-class audience something that is also reflected in support for the women's national team⁶.

What do Fans Want?

“So, winning is important, but to me, it's more important to be going to the games, enjoying the games with my friends.”

“We have been coming along for years; everybody treats you as family and I want my girl to grow up and know that she can play fitba if she wants”

“Obviously we love when we win but it's also a kind of social, it's a longer week if there is no football on the Sunday to look forward to”.

“There really needs to be some kind of central ticketing system because having to make so many accounts for different clubs just to get tickets for away games is frustrating”.

“For all the away games it's a different system for getting a ticket – which is really frustrating”.

“I'd quite like to see an SWPL ticket centre if possible”.

“Yeah, we'd like to see programmes at the games. That's one thing that we don't do, whether it be printed or even like a digital programme”.

“I would definitely like to see more stuff going on outside of the ground because you could probably catch a few people to come to the game who are passing by or something like that, just with a bit more information out there”.

“I think it's important to have more competitive games, but I do think that moving to a new format next season will be quite good as well”.

- 77% of fans reported that they enjoyed the atmosphere in the stadium and amongst the fans, as a reason for attending.
- 72% of fans agree, a lot or a great deal, that experiencing the atmosphere in the stadium is important to them.
- The top five factors in creating a very and extremely positive matchday experience are safety, attitude of club staff and stewards, stadium facilities, ease of ticket purchasing, and atmosphere in the stadium.

⁶ SFA (2023) Hampden Nights Fan Survey- New fan survey reveals growing positivity around Scotland Women's National Team (Accessed 28 November 2024).

- 68% reported showing loyalty to their club.
- 50% identified being at the match as the main way to watch their club.
- 47% were motivated by a desire to spend time with family and friends.
- The positive sentiment towards women’s club football is significantly higher in 2024 than it was in 2021

Match Attendance

“I like the games on Sundays. For me, men’s football feels like a Saturday thing, and women’s football feels like a Sunday thing. I like that—it gives women’s football its own day”.

“I don’t drive, and sometimes it’s an absolute nightmare. But to be honest, there’s not really a lot that the league can do about poor Scottish public transport”. For example, ground X —the station is just really not close to the ground at all. So, you’ve got a long walk, a properly substantial walk”.

“We do prefer a 1.0’clock kick off, if you’re going away to watch the game sometimes you don’t get home to midnight which is not fair on the kids- particularly during the week- it’s tough if you rely on public transport”

“It’s really good that it’s affordable for families in a way that the main scheme probably isn’t”.

“We try and get to the games quite sharp because in the women’s game there’s no allocated seating. You try and get a specific area like behind the tunnel. So, you need to get in early to try and reserve that space”.

- Over 70% of supporters surveyed attend more than 6 home games a year.
- A fifth of SWPL clubs increased their average attendance by more than 50% during season 2023-24.
- 83% of respondents reported, a value of 7 or above on satisfaction of the match day experience at their club for SWPL matches. (on a scale of 1-10 with 10 being the best).
- The majority of fans travel to the games by car. 71% reported that this was their means of transport, only 16% reported using public transport.

Communication and Consumption

“To get the information on ticketing available so we can hear it on our socials because sometimes it is a bit of a hunt round right”.

“I’d also like to see hospitality packages before games where you could sit down with some club members or other supporters before the game”.

“I’d like the supporters’ clubs of the different teams to work together. I think there’s already some collaboration happeningbut I think it would be useful to have a kind of supporters’ club group a group of people who get together to talk about what they can do across the board”.

“The communication around mid-week games could be better, sometimes you don’t get the kick off time or price until late on”.

“We get nearly all our information now on social media, I also think it’s better since me moved to ticket-master”.

“Yeah, I think the BBC has upped their game a bit with what they're doing with the online and Alba and BBC Scotland. But it's almost like they've agreed to show the games and then nobody really cares about actually broadcasting them properly, making sure the broadcasts are smooth, ensuring there are no interruptions, and that the online service doesn't drop out. That side of it could be better. I think what they're doing, in terms of the number of games they're showing, is a lot better. It's just making sure that the quality is there as well”.

We were interested in generating a general sense of what matchday experiences were available for fans.

- 42% were aware of mascot opportunities and a further 25% were aware of the offering to children.
- 35% reported that they didn't know of any of these things on offer, including any corporate hospitality/ or hospitality.
- Online engagement is more than 50% higher in 2024 than it was in 2021.
- Increased online engagement between 2021 and 2024 has been greatest for the following accounts (alphabetical order) Glasgow Celtic, Glasgow Rangers, SWPL and to a slightly lesser extent Hibernian.
- The account with the most significant increase in users is @SWPL, with over 50% growth. This indicates that the number of people taking an interest in the league is growing at a faster rate than the number taking an interest in specific women's teams.
- 76% reported that the club website is where they get their information on tickets and fixtures from. 51% reported using club social media platforms. 33% reported as getting information from non-club related social media. Very few supporters receive their information by traditional methods such as newspapers, club programmes or newsletters.
- 48% reported that they liked to watch any SWPL game, even if their team is not featured, measured against 23% who reported that they only watch SWPL games featuring their own team and the 'big games' (e.g. cup finals, local derbies).
- While ¾ of YouTube channel viewers are still male, the gender balance is more equal than it was in 2021. 52.73% of viewers are under the age of 35 and 23.44% under the age of 25
- YouTube trends suggest UK represents the most active geography with a strong showing from the US. Other countries with a presence are Australia, Canada, Spain, Brazil, Ireland, Chile, Latvia, Thailand, and Denmark.

Community and Social Issues

“If you mean the local geographical area, then yeah, the local geographical area. I think that's partly why they're doing the food bank collection at the next home game”.

“We've worked with ...and had partnerships with many mental health charities focused on specific women's issues. That initiative was driven by the club, and I think that's super important”.

“We get the emails from Glasgow City who do a lot of good work on women’s issues, and we could probably do more like that – we do the red card against racism but that is the only one I can think off”.

“The national team has a big responsibility and could do a lot nationally for the awareness and for people wanting to engage with the game and want to come and support their local teams”.

“Engaging with women-specific things like Glasgow City do because, you know, that is important. At the end of the day, the team members are women and many of the people who go to watch them are women or girls. So, it would be good to, you know, even address things like that the England team not wanting to wear white shorts. That’s something that girls can relate to. Potentially even getting involved with some of these campaigns would be good because the girls and the team are really good role models”.

- 85% see it as important as a focal point for the local community.
- 26% of supporters reported that they were very aware of community activities.
- 16% of supporters identified that they were not aware of any of the activities the club was engaged in with the local community, and 57% only somewhat aware.
- In relation to racism, 32% reported that their club did very well. In addition, the clubs were seeing as being very effective in engaging well on LQBT community issues.
- 28% of survey respondents reported a negative score for tackling the environment. In relation to sectarianism 26% feel the club adequately engage well on this issue.
- Engaging with fans on issues affecting them could help build positive relationship and the feeling of the stadium being an even more inclusive space.
- We asked supporters about whether they would like to be part of a club supporters’ network. 55% of supporters identified that they would like to be a member of this network and a further 14% are already members.

Place and Belonging

“We don’t own the stadium, but it is like having a home and it’s great to be in one place for the foreseeable future”

“I don’t want Glasgow City to play outside of Glasgow”

“Our main fanbase is Leith and when we are at Livingstone, we only got a few, it’s important to be close to your own fanbase,”.

- A sense of place is an important aspect of fandom.
- 66% reported that they attend both men’s and women’s games.
- 31% of reported that they only attend the women’s game.
- The responses support the observation that for SWNT fans it is not always about winning. It is about friendship, loyalty and belonging.
- 49% thought that socialising future generations of supporters was more or much more important than winning.
- 87% reported that sharing the experience with family or friends was equally, more or much more important than winning.
- 43% of supporters somewhat or strongly agreed that they would enjoy another stadium as much as their own.

- The sense of place at club level is not as strong as it is at national level⁷.
- 71% believe a lot and a great deal about the football club gives them a sense of belonging.

Key Observations and Recommendations

RO1 The positive sentiment towards women's club football is significantly higher in 2024 than it was in 2021

RO2 Online engagement is more than 50% higher in 2024 than it was in 2021.

RO3 83% of respondents reported, a value of 7 or above on satisfaction of the match day experience at their club for SWPL matches. (on a scale of 1-10 with 10 being the best).

RO4 More than 2 million people watched the SWPL on television or online during the 2023-24 season.

RO5 The second annual accounts for the SWPL show that for season 2023-24 payments to clubs totalled £389,000, an increase of 17%, with £304,000 being distributed through the club fee payment and the remaining £85,000 being distributed as prize money through the Sky Sports Cup.

RO6 €1 billion direct funding into the women's game has been pledged by UEFA for the 2024-30 cycle targeted at supporting senior and youth national team competitions, club tournaments, distributions to clubs and national associations.

RO7 Competitive balance remains a key factor in contributing to increased commercialisation and fan engagement.

RO8 Women's football in Scotland is consumed by primarily middle-class audience something that is also reflected in support for the women's national team.

RO9 Winning is important but it is not the only or even the main reason for attendance.

RO10 Both women's and men's football in Scotland have yet to optimise opportunities for international engagement and exposure.

RO11 The recommendation within the SFA's Transitions Phase report to evidence the transition of young players from 16-21 should be actioned. Comparative benchmarking of the growth of football for girls and women in Scotland is important.

RO12 A balanced approach to where games are played should take account of not just cost but increased visibility and atmosphere.

⁷ SFA (2023) Hampden Nights Fan Survey- New fan survey reveals growing positivity around Scotland Women's National Team (Accessed 28 November 2024).

RO13 Increased visibility comes in many forms and needs to be supported in a number of ways until the women's game in Scotland is more self-sustaining. Women's and Girls football in Scotland needs to be given time to grow crowds at the professional elite level.

RO14 Football fans are calling for increased exposure and merchandising outside of stadiums on matchdays.

RO15 Building a global digital footprint requires an active presence in countries with different languages and cultures. Telling athlete/women's football stories requires local language — using a community manager and media partners who can deliver the content in local languages is key.

RO16 Supporting further economic mobility through women's football can be improved by creating opportunities for more social mixing across class lines.

RO17 Technology and stadium digital capability have an ever-increasing role to play in keeping both traditional and fluid fans engaged. The quality of TV coverage is as important as quantity.

RO18 The question remains open as to whether a sustained 24/7 online fan culture around women's club teams has emerged.

RO19 An increased number of women and girls supported by clubs and associations through the pro-licence system would further enable the professionalisation of the game.

RO20 The number of women whose primary income comes from Scottish football is lower when compared to European nations such as France.

RO21 The option of a more centralised ticketing system being made available to more fans should be explored.

RO22 Stadiums location removed from the main core fanbase impacts upon achieving optimal fan attendance. SWPL teams that are part of main SPFL clubs should where possible increase the quota of SWPL games played in club owned stadiums.

RO23 Midweek fixtures for away fans, particularly where public transport routes to the stadium are challenging, can be a deterrent.

RO24 The SWPL should continue to benchmark itself against other pro-leagues in terms of provision, trends and competitive balance.

RO25 Continued innovation based upon research and development is a key factor in sustainable business growth.