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THE UNIVERSITY *of* EDINBURGH Academy of Sport



Scottish Women's Premier League

Club Days at Scottish Women's Football:

SWPL Fan Engagement Report.¹

Grant Jarvie², Paul Widdop, Jake Barrett, Jianing Qiao³

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.

² **Contact: Professor Grant Jarvie, University of Edinburgh, Grant.Jarvie@ed.ac.uk**

³ Grant Jarvie, Paul Widdop, Jake Barrett and Jianing Qiao are all researchers with the Academy of Sport at the University of Edinburgh.

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.
- 68% reported showing loyalty to their club.

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

- 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 seen 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.

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

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.

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.

Introduction

1. As we continue to shine a light on Women's football it is pleasing to see a shifting positive landscape. National and international reports continue to evidence increasing number of professional players, more commercial partners and revenues, increased visibility through broadcasting and continuing commitment and resources from some clubs.
2. Both Women's and Men's Football Leagues around the world have continued to adopt various formats, innovative technologies and different characteristics each with their own merits as different countries continue to work out what works best for their own member clubs.
3. In its current format The Scottish Women's Premier League (SWPL) clubs play the second highest number of games across world leagues. Key factors in an agreed restructuring were not only the protection of players but maintaining more of a competitive balance. Something that is a key factor in contributing to increased commercialisation and fan engagement.
4. The introduction of a restructured SWPL for season 2025-26 has resulted from listening to member clubs and comparing the number of games played by SWPL clubs against European averages. From 2025-2026 the SWPL will follow a two leagues of 10 format.
5. *Club Days at Scottish Women's Football* is the 10th data driven report produced by the *University of Edinburgh's Academy of Sport*⁸. The reports: (i) support Scottish clubs and national associations better understand their fan base (ii) use data driven innovation as well as traditional methods of data collection to inform the football industry and (iii) support the closing of data gaps where they exist.
6. *Club Days at Scottish Women's Football* is our 5th report that has specifically supported the closing of a data gap between men's and women's football. The new 2024 data complements and adds to the data on women's football gathered from our earlier investigations from 2020.

Approach

7. *Club Days at Scottish Women's Football* involved five stages of data collection over 2024. These were as follows (i) analysis of desk reports, documents and accounts relevant to Scottish Women's Football; (ii) the collection of new club survey data and a look at recent survey data from fans attending women's international matches at Hampden; (iii) a new sentiment analysis of Scottish Women's club football and a comparison with 2021 sentiment analysis data and (iv) a series of focus group interviews with football fans attending women's club matches during 2024 and (v) Observation and notes from attendance at SWPL matches throughout season 2023-2024.
8. The project draws upon previous data sets on Scottish women's football as a basis for making some comparative observations on Scottish women's football. These included (i) the 2023

⁸ See [University of Edinburgh- Academy of Sport](#).

survey data from the Hampden Nights Survey which covered SWNT matches at Hampden⁹ and (ii) the 2021 sentiment analysis of Scottish women's club football. The comparisons allowed us to track audience growth and sentiment shifts over time.

9. The 2024 SWPL Club Survey was held open for two months and generated a response rate of more than 500 (N=552) complete and clean survey returns. The highest number of returns were from (alphabetical order) Celtic, Glasgow City, Hibernian and Rangers with smaller numbers from Partick Thistle and Hearts. The 2023 SWNT survey generated a response rate of more than 24% of SWNT core fans (N=994). Follow up focus group interviews with 6 clubs were completed in order to further test the findings from the 2024 survey.

10. The SWPL Club Fan Survey gave fans the opportunity to have their say on the experiences and issues that affect them as supporters. The fan engagement survey was wide-ranging, comprehensive, independently conducted, and focused upon a range of key issues that figure in fan engagement surveys including:

- Socio-Demographics.
- Reasons for attending.
- The importance of winning.
- Attitudes towards the role of football in the wider community.
- Motivation to attend live football.
- Match attendance.
- Ticketing.
- Travel.
- Stadium safety and inclusivity.
- Sources of information and connectivity.
- The importance of belonging.

11. The sentiment analysis provided an insight into social media activity around women's club games. The overall aim was to assess the online conversations around the SWPL with a focus upon participating clubs and trends in comparison to 2021.

12. All the data for 2024 online engagement and sentiment analysis was collected between 1 February 2024 and 11 June 2024. In the 2021 analysis we tracked the same keywords over a 12-week period from 5 April 2021 to 4 July 2021.

13. All the Focus Group Interviews were held between June 2024 and January 2025. Observations and notes from attendance at SWPL matches were collected between September 2024 and January 2025.

International Perspectives, Issues and Growth

⁹ University of Edinburgh Academy of Sport (2023). Hampden Nights: Scottish Women's National Football Team Fan Survey. Edinburgh: University of Edinburgh.

14. UEFA forecast a sixfold increase in the commercial value of women's football. *Unstoppable* the 2024-2030 UEFA strategy sets out key priorities as (i) making football the most played team sport for women and girls in every European country, through developing football pathways for players, coaches and referees alongside grassroots opportunities; (ii) making Europe the home of the world's top players, with six fully professional leagues and 5,000 fully professional players across the continent; (iii) making football the most sustainable and investable women's sport, with record-breaking UEFA competitions and (iv) ensuring that women's football is celebrated for its unique values and community, where everyone believes that they can have a place.¹⁰
15. The €1 billion earmarked for the 2024-30 cycle will come from competition revenues and direct funding into the women's game and will be targeted at supporting senior and youth national team competitions, club tournaments, distributions to clubs and national associations, and various other development initiatives¹¹.
16. Netflix have secured the exclusive US broadcasting rights for the 2027 and 2031 FIFA Women's World Cup¹². The deal marks the first time that platform has secured an athletic competition in full. In addition to offering live coverage in the US Netflix will produce exclusive documentary material in the lead up to both tournaments. This will showcase top players, their journeys and the global growth of women's football. The broadcasting deal includes Puerto Rico and covers all languages.
17. The Deloitte Money League 2025 reported that retail and sponsorship are key earners for the top women's clubs. Olympique Lyonnais monetised its brand, generating a €27m lump-sum royalty as compensation for granting an initial 50-year license for the 'Olympique Lyonnais' brands to OL Féminin¹³.
18. The make-up of the clubs ranked 11th-20th reinforce the impact of on-pitch success on financial performance. Eintracht Frankfurt (€245m) dropped out of the top 20 in 2023/24 following a 34% decline in broadcast revenue (16% decrease in total revenue) as the club participated in the UEFA Europa Conference League versus the Champions League. This change underscores the distinction in business models between clubs in the Money League and reiterates the role commercial revenue generating ability has played in enabling the likes of women's teams such as Liverpool, Tottenham Hotspur, and Chelsea retaining their position in the top 10 Money League rankings despite reduced broadcast income after missing out on Champions League participation.

¹⁰ UEFA (2024). *Unstoppable* (2024) Women's Football Strategy 2024-2030- <https://www.uefa.com/news-media/video/0293-1c3acd941e8f-17fab91f1a62-1000--unstoppable-uefa-women-s-football-strategy-2024-2030/> (Accessed 10 November 2024).

¹¹ UEFA (2024). *Unstoppable* (2024) Women's Football Strategy 2024-2030- <https://www.uefa.com/news-media/video/0293-1c3acd941e8f-17fab91f1a62-1000--unstoppable-uefa-women-s-football-strategy-2024-2030/> (Accessed 10 November 2024).

¹² Inside FIFA (2024). FIFA and Netflix sign historical broadcast deal for 2027 and 2031 FIFA Women's World Cup. Media Release 20 December 2024.

¹³ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

19. FIFA in partnership with the *Deloitte Sports Business Group* have previously mapped the international landscape of women's football.¹⁴ It provides an insight into how other clubs and nations are responding to many of the themes that exist within Scottish women's football. In some of the key takeaways from *Setting the Pace* Scotland is ahead of the curve but in others it should further reflect upon if and how it wants to get there.

20. The key facts from the FIFA/Deloitte Report are¹⁵:

- On average, 17% of players per league had five or more international caps for their women's national team.
- Higher revenue-generating leagues were more likely to have adopted referee communication systems.
- 63% of leagues required coaches to hold a Pro or A Licence. Clubs were typically exceeding these requirements, with 69% of coaches holding an A Licence or above.
- Stand-alone clubs have proven themselves to be commercially attractive, not needing to rely on the brand associated with a men's team. They generated, on average, higher revenue (USD 893k) than clubs with affiliated men's teams (USD 748k).
- An increasing number of leagues are adopting club licensing systems, now in place for 79% of leagues surveyed, compared with only 66% of leagues in 2020-2021.
- 38% of clubs negotiated their main sponsor for the women's team only, with only 25% of clubs negotiating their kit sponsor independently.
- Leagues with a dedicated commercial strategy reported significantly higher commercial revenues (an average of USD 2.7m) compared with those without (USD 1.1m).
- Average broadcast revenue generated by individual clubs exceeds USD 100k, which is a positive direction of travel.
- On a country-by-country basis, clubs in the USA, England, Australia and Sweden generated significantly greater operating revenue than those based elsewhere.
- The average salary paid per player across all clubs surveyed has increased year-on-year from USD 14,000 to USD 16,825. This average reflects a wide range of salaries across countries with varying economic conditions.
- 12% of clubs indicated that they made a financial profit, with 59% generating a financial loss and the rest breaking even. Although the game has undergone significant growth in recent years, it still requires continued investment.
- 27% of clubs played at least one home game in another stadium (which was not their regular stadium) in 2021-2022 and achieved attendances that were typically three times larger than those played at the regular stadium (3,674 v. 772).
- 22% of clubs sold season tickets to watch the women's team only (i.e. not bundled with those of the men's team), and typically achieved an average attendance over two times higher than those clubs which did not (1,314 v. 658).
- Facebook remains the most prevalent social media platform used by clubs, with 83% having an account. However, where clubs had an account, TikTok was the most followed and typically had many more followers (1,136k v. 669k on Instagram and 313k on Facebook).

¹⁴ FIFA (2024). *Setting the Pace: FIFA Benchmarking Report Women's Football*. Zurich.

¹⁵ FIFA (2024). *Setting the Pace: FIFA Benchmarking Report Women's Football*. Zurich.

- 62% of clubs responded that football was the primary source of income for 50% or more of their players. Those clubs with larger squads (25 or more players) on average had a higher proportion of professional players (70%) compared with only 67% for clubs with smaller squads (<25 players).

21. Sarai Bareman, FIFA's Chief Women's Football Officer, recently stated that:

"The Women's game is the single biggest growth opportunity in football today. The challenge now is to sustain momentum in driving the success of women's clubs and leagues".¹⁶

Lisa Klaveness, President of The Football Association of Norway, has repeatedly noted that:

*"Football is the biggest sport in the world for women, it is increasingly popular The budgets for the women's game are increasing, but they are getting weaker compared to the men's game. It is very frustrating. The money that is invested just feeds this difference and **the gap has to close**".¹⁷*

22. Internationally the 2024 international transfer window illustrated an upward trajectory in the number of women transfers. The total number of transfers made in 2024 being 12,125 against 11,400 in 2023.¹⁸

¹⁶ Deloitte, (2023). *Women's football that roars*. [Accessed 30 August 2024]- <https://www2.deloitte.com/uk/en/pages/annual-review-2023/stories/womens-football-that-roars.html>

¹⁷ Klaveness, L (2024) Inside World Football 30 August 2024 <https://www.insideworldfootball.com/tag/lise-klaveness/> [Accessed 30 August 2024].

¹⁸ Inside World Football (2024). 'Transfer spend \$1bn down on 2023 at \$6.4bn, but women's game continues to grow' 3 September 2024- <https://www.insideworldfootball.com/2024/09/03/transfer-spend-1bn-2023-6-4bn-womens-game-continues-grow/> [Accessed 5 September 2024].

International transfers during the mid-year transfer window in women's professional football



Figure 1: International Transfers in Women's Professional Football at September 2024

23. Internationally, spending on players in the women's game is also up, reaching \$6.8 million in 2024, more than double the \$3.2 million figure of 2023. FIFA Chief Legal & Compliance Officer Emilio García Silvero stated:

"We have just completed a very intense window which, among others, confirmed the steady development of transfers in women's football."¹⁹

24. Multi-Club ownership is not exclusive to men's football. Michele Kang who owns three football teams formed the first women's multi-club ownership group as well as recently purchasing London City Lionesses.²⁰ Two main reasons were given for the later with the first and primary reason being that London City Lionesses were independent. The second being the fact that its name is London City and therefore the women's football team has a significant opportunity to benefit from the national and international exposure that being part of a major

¹⁹ Inside World Football (2024). 'Transfer spend \$1bn down on 2023 at \$6.4bn, but women's game continues to grow' 3 September 2024- <https://www.insideworldfootball.com/2024/09/03/transfer-spend-1bn-2023-6-4bn-womens-game-continues-grow/> [Accessed 5 September 2024].

²⁰ Michele Kang Interview with Tom Garry (2024) 'This is not charity. This is serious investment' The Observer 18 August 2024, p12. See also Inside World Football (2023) 'OL Groupe and Michele Kang combine to form first women's multi-club ownership group' Inside World Football '17 May 2023- <https://www.insideworldfootball.com/2023/05/17/ol-groupe-michelle-kang-combine-form-first-womens-multi-club-ownership-group/> [Accessed 31 August 2024].

City or Town brings. Something that both men's and women's football in Scotland could capitalise upon more.

25. Kang's newly launched Kynisca Innovation Hub (KIH) is looking to raise \$100 million to support its goal to 'unlock female athletic potential' by revolutionising training methods on the Women's side of the sport.²¹ Kynisca's ambition stretches beyond Kang's current ownership portfolio and has hinted at plans to unite elite clubs and invest in infrastructure across Africa, the Americas, Asia, and Europe to drive innovation in women's sports. Kang has asserted that all three of her current clubs (Washington Spirit, Olympique Lyonnais Féminin and London City Lionesses) will maintain their identities, heritage, and community ties.
26. Kang has pledged \$30m (£23.6m) to US Soccer - a donation the organisation says will "transform" women's and girls' football in the United States. US Soccer noted that Kang's investment over the next five years would enable scaling up of competitive opportunities for youth players, expand and improve talent identification, and fuel professional development for female players, coaches, and referees"²².
27. Women's Football, argues Kang, is about providing an environment where a professional career path is open to girls and women and where more underprivileged, under-resourced young people are able to achieve their dream of playing football. The long-term ambition remains winning the Women's Super League.
28. In France Paris saint Germain (PSG) and Olympique Lyon Feminin (OL) have dominated the French Scene. OL are known for access to the same facilities at the men's side as well as high level investment in coaching, medical and support staff²³. As of May 2021, 81% of players in French women's football earned their primary income from the sport which compares to 85% in Italy, 91% in England and 100% in Spain²⁴.
29. In France female footballers are amongst the highest paid earners in women's football, second only to Basketball. The French Football Federation (FFF) hopes to fully professionalise by 2026. As with other countries spectatorship remains an area of needed growth. The average attendance for Division 1 in France (D1) in the 2022-2023 season was 841²⁵. During the same season, 2022-23, this compared to 6,961 for the Women's Super League (WSL); 3,057 for the Frauen Bundesliga and 849 for Sweden's Damallsvenskan²⁶.

²¹ Inside World Football (2024). Kang launches Kynisca Sports with Mission to 'unlock Female Athletic Potential' Inside World Football 2 August 2024 -<https://www.insideworldfootball.com/2024/08/02/kang-launches-kynisca-sports-mission-unlock-female-athletic-potential/> [Accessed 5 September 2024].

²² BBC sport (2024) <https://www.bbc.co.uk/sport/football/articles/c4gv05yjdgeo> 19 November 2024 (accessed 28 November 2024)

²³ Krasnoff, L (2025). The paradox of French women's football in Chadwick, S, Widdop, P and Goldman M (Eds) The Geopolitical Economy of Football. London: Routledge: pp95-104.

²⁴ Krasnoff, L (2025). The paradox of French women's football in Chadwick, S, Widdop, P and Goldman M (Eds) The Geopolitical Economy of Football. London: Routledge: pp95-104.

²⁵ Krasnoff, L (2025). The paradox of French women's football in Chadwick, S, Widdop, P and Goldman M (Eds) The Geopolitical Economy of Football. London: Routledge: pp95-104.

²⁶ Krasnoff, L (2025). The paradox of French women's football in Chadwick, S, Widdop, P and Goldman M (Eds) The Geopolitical Economy of Football. London: Routledge: pp95-104.

30. As of February 2024, the number of women and girls in France who hold a football license reached a record high of 247,160 a 12% increase from 2022-2023.
31. The hosting and bidding for women's football events has helped to promote a favourable image of the sport and France.
32. Many of the questions raised within international benchmarking reports of women's football are also relevant to Scotland.
- *Where should the games be played?*
 - *How is women's football covered within parent club Boards?*
 - *How many women are supported to take the UEFA Pro-License?*
 - *How are team sponsors informed about opportunities to sponsor women's clubs?*
 - *To what extent can football become the primary source of income for more women footballers.*
 - *How are season tickets sold?*
 - *What is the average length of the contract in Scottish women's football?*
 - *What is the engagement gap between women and men's football and how is it reduced?*
 - *Will the lack of competitive balance in the men's game be replicated in the women's game?*
 - *What are the advantages and disadvantages of multi-club ownership for women's football in Scotland?*
33. The growth of women's football internationally is not without its challenges. The Deloitte 2025 report on the growth of women's football contains a word of caution²⁷. There is a need to balance revenue optimisation with player welfare. Clubs such as Real Madrid, Manchester City and Flamengo participating in the FIFA Club World Cup in 2025 could potentially play in 68, 74, and 87 matches respectively during the 2024/25 season²⁸.
34. FIFPro Europe filed a formal complaint to the European Union over the international match calendar. Should the challenges not be resolved, there exists a financial risk if the union votes to implement a strike during the football season²⁹. The need to manage workload is critical to providing the best on-pitch quality and the entertainment that fans, broadcasters, sponsors, and investors all want. The inability to resolve this key challenge could damage the value of the sport in all senses in the long-term³⁰.
35. As governing bodies rush to introduce new competitions or implement format changes to existing competitions, the relative importance of sporting performances in driving financial success for clubs will increase³¹. The top performing Money League clubs have all used historical and current on-pitch success as a catalyst to spark the growth of global sport and

²⁷ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

²⁸ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

²⁹ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

³⁰ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

³¹ Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

entertainment brands. A shake-up in the rankings will require clubs further down the ladder to take the leap in on-pitch performance, while nurturing a brand and ethos that transcends borders to resonate with international audiences both in atmospheric stadiums and across digital platforms.

36. Deloitte 2025 notes that “While women's clubs have traditionally been compared to the structure and business of men's clubs, we are seeing a fundamental shift in the recognition of opportunity that stems from embracing key differences”³².
37. The answers to such questions have to find solutions that acknowledge the context and situation that is Scotland. The growth of girls and women’s professional football in Scotland is at a certain stage of development, not too dissimilar to the process involved in start-up companies or small to medium sized social enterprises.
38. The SWPL continues to reflect upon ways to enhance the game, the drama, the fan experience while recognising that the women’s elite professional game in Scotland does not exist in isolation from international contexts, fads, fashions and trends. For example, The Laws of the game are still governed by The International Football Association Board. UEFA and FIFA are still sources of significant potential revenue.
39. Scottish women’s football is leveraging more funding into women’s and girls football in Scotland.³³ Something that is valuable given the gate money available to women’s football remains relatively small, but growing, when compared to the men’s game. Scotland’s gate attendances, the highest in Europe, are sometimes used as an argument for not having more games on television but such arguments as yet do not apply to women’s football in Scotland which is striving to sustain and build upon increased attendances and increased commercialisation.

The Scottish Women’s Premier League

40. The Scottish Women’s Premier League Limited is a private company limited by shares in Scotland. It is a subsidiary of the Scottish Professional Football League and began trading in June 2022. It was established with a purpose of being able to deliver increased financial returns to the clubs who operate women’s teams.³⁴ Something that is being achieved.
41. The SWPL has its own Board, but Scottish Women’s Football is also part of the geo-political economy of National, European and International football fighting for resources, increased visibility and growth.

³² Deloitte (2025). *Deloitte 2025 Money League*. <https://www.deloitte.com/uk/en/services/financial-advisory/analysis/deloitte-football-money-league.html> (Accessed 30 January 2025).

³³ McKinley, H. (2023). Leading the way for the elite women’s game. *Nutmeg*. March 2023: pp18-23.

³⁴ The Scottish Professional Football League: Annual Report and Financial Statements for Year Ended 31 May 2023.

42. During the 2022/2023 season the total distribution to SWPL clubs amounted to £344k, a 500% increase on the 2021/2022 season.³⁵ The total SPL group distribution (SWPL plus SPL) for 2022/2023 amounted to £35, 776, 000.³⁶
43. The second annual accounts for the SWPL revealed 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.³⁷
44. Increased UEFA funding opportunities for coming third in SWPL is an incentive which brings prestige and a direct and indirect funding return. However, it is still a financial challenge for the smaller European Women's Football Leagues to compete. Women's clubs can bank about 400,000 (euros) from making it to the group stages of European competition.³⁸ The financial outlay for the preliminaries in order to reach the group stages is not prohibitive but significant for SWPL clubs. The equivalent financial return for the UEFA Champions League for SPL clubs would be between £50 to 60 million.³⁹
45. New broadcast deals with Sky Sports, BBC Alba and BBC Scotland along with sponsorship from Parks Motor Group all contributed to the increased financial distribution arising out of the 2022/2023 season. Viewing figures for broadcast matches over the course of that season exceeded 1.4 million.⁴⁰ More than 2 million people watched the SWPL on television or online during the 2023-24 season. The 2023-2024 season was also the first full season in partnership with PUMA which saw the Orbita match balls becoming the official match ball of the SWPL and, for the first time ever, a bespoke SWPL match ball being designed and distributed to the clubs.
46. As of January 2025, the total number of SWPL matches broadcast live during the 2024-25 season had increased to 34.
47. The total number of spectators attending matches for the 2023-24 season once again surpassed 100,000 (102,913) but fell slightly short of the 2022-23 record (106,781).⁴¹ A fifth of SWPL clubs increased their average attendance by more than 50% during season 2023-24.⁴² The record attendance for a Scottish women's club match is currently 15,822 and 18,555 for the Scottish Women's National Team.

³⁵ The Scottish Professional Football League: Annual Report and Financial Statements for Year Ended 31 May 2023.

³⁶ The Scottish Professional Football League: Annual Report and Financial Statements for Year Ended 31 May 2023.

³⁷ SWPL (2024) <https://swpl.uk/news/swpl-reveals-record-fee-payments-to-clubs-2024/> (Accessed 10 November 2024).

³⁸ McConnell, A. (2024). Cultural Echoes Linger 50 Years on from Cook's SFA Challenge. *The Sunday Herald* 1 September 2024, p73.

³⁹ McConnell, A. (2024). Cultural Echoes Linger 50 Years on from Cook's SFA Challenge. *The Sunday Herald* 1 September 2024, p73.

⁴⁰ [BBC Sport \(2024\)](#). Nearly 50% rise in Scottish Domestic Women's Audiences. 24 July 2024.

⁴¹ [BBC Sport \(2024\)](#). Nearly 50% rise in Scottish Domestic Women's Audiences. 24 July 2024.

⁴² [BBC Sport \(2024\)](#). Nearly 50% rise in Scottish Domestic Women's Audiences. 24 July 2024.

48. Scottish women's football has strived to provide a positive family atmosphere at SWPL matches. 77% of fans reported that they enjoyed the atmosphere in the stadium and amongst the fans, as a reason for attending. 68% reported showing loyalty to their club. 50% identified it as the main way to watch their club while 47% were motivated by a desire to spend time with family and friends.
49. The official title sponsors for season 2024-2025 are Sky Sports and Scottish Power while other official partners include The SPL, Puma, BBC Alba, BBC Scotland, Wyscout, Scoot, Parks Motor Group and inspiresport. A record breaking 4,191 people attended the opening weekend of the 2024-25 season.⁴³ For the 2024-2025 season 20 teams make up SWPL 1 (12 teams) and SWPL 2 (8 teams). Crowd capacity at home grounds range from 500-15,000 with Kilmarnock and Hamilton being the only clubs whose registered ground is the main club ground (artificial pitches).
50. The leveraging of funding into Scotland through UEFA and FIFA, player trading to and from other leagues, the hosting of international football events in Scotland, the growth of footballers as international ambassadors are just some of the many factors that remind us that Scottish Women's Football does not exist in isolation. Scottish football in general has yet to optimise the extent to which football can enable international engagement.
51. Women's football at club and grassroots level in England, Australia, and New Zealand have all financially benefited from hosting international women's football tournaments. The 2024 A- league in Australia was the most attended in Australian history with a total attendance of 312,129, making a 127% increase on the previous year. A figure that was partly enabled as result of a time limited boost from the Matilda's efforts in 2023 Women's World Cup and an improved game day approach.⁴⁴
52. Benchmarking the growth of Scottish women's football is a valuable comparative exercise. As momentum around Scottish women's football continues to grow, so do discussions about its future commercial potential. With all forms of engagement from attendance, viewership, social engagement (and more!!) on the rise, the question remains - is the needle moving as fast as it could be in these areas when it comes to commercial returns?
53. It is pleasing to see the extent to which data driven innovation and analysis continues to inform policy and practice within the Scottish football industry. The observations and recommendations in the most recent SFA report on transitioning into elite football in Scotland are important.⁴⁵ In the context of this report attention should be specifically drawn to *Section Six: Transition Phase in the Girls & Women's Pathway of the SFA Report on the Transition Phase* are to be welcomed.⁴⁶
54. National (SWNT) Football fans are also key stakeholders in Scottish women's football. 86% of the SWNT fans surveyed in *Hampden Nights* reported that the Scottish Women's National

⁴³ BBC Sport (2024). Scottish Women's Football- <https://www.bbc.co.uk/sport/football/womens/scottish> [Accessed 23 August 2024].

⁴⁴ YouGov Australia (2024). Netting Goals and Profits: Unleashing the Potential of Women's Sport. Australia: Women in Sport Whitepaper 2024.

⁴⁵ Gould, A and Docherty, C (2024). *The Scottish FA Report on the Transition Phase*. Glasgow.

⁴⁶ Gould, A and Docherty, C (2024). *The Scottish FA Report on the Transition Phase*. Glasgow.

Team was important to Scotland. 80% reported that creating a positive stadium atmosphere was very/extremely important. 79% agreed or strongly agreed that the Scottish Women's National Team played an important role in the community.

- 55.** A data driven approach can help to provide a better understanding of fan engagement at women's club matches in Scotland. It is important to have an informed understanding of who the fans are and what fans at women's club matches want. This information can also help to further enable, grow and sustain women's elite football in Scotland.

Summary of Initial Survey Findings⁴⁷

Who are the SWPL fans?

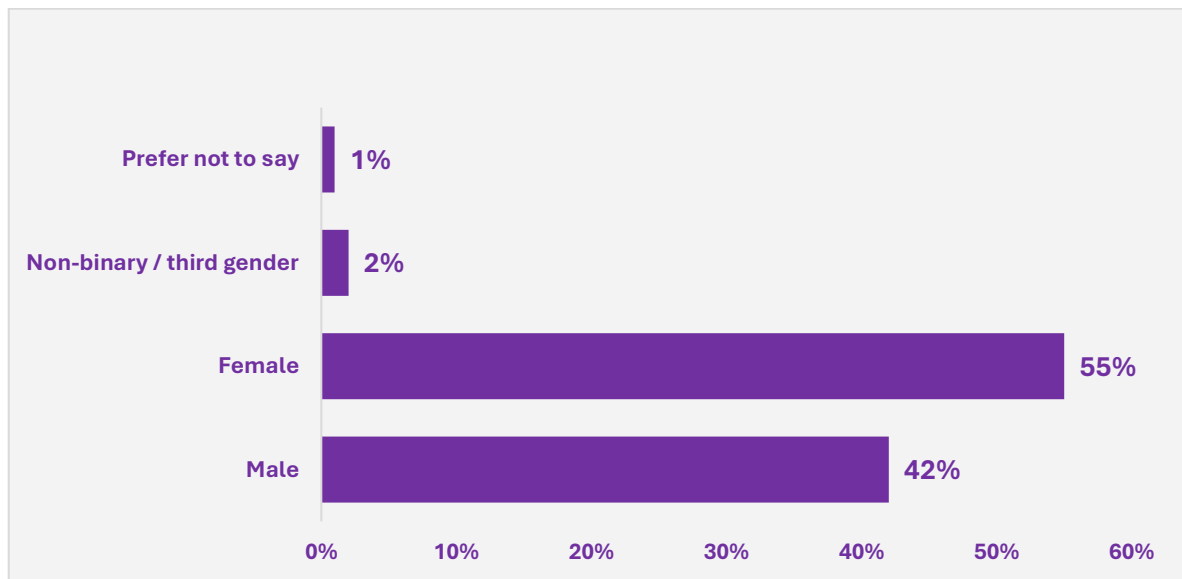


Figure 2: Gender of Supporters

⁴⁷ Please note that a more detailed 16-page 2024 SWPL Fan Engagement Survey Report is available.

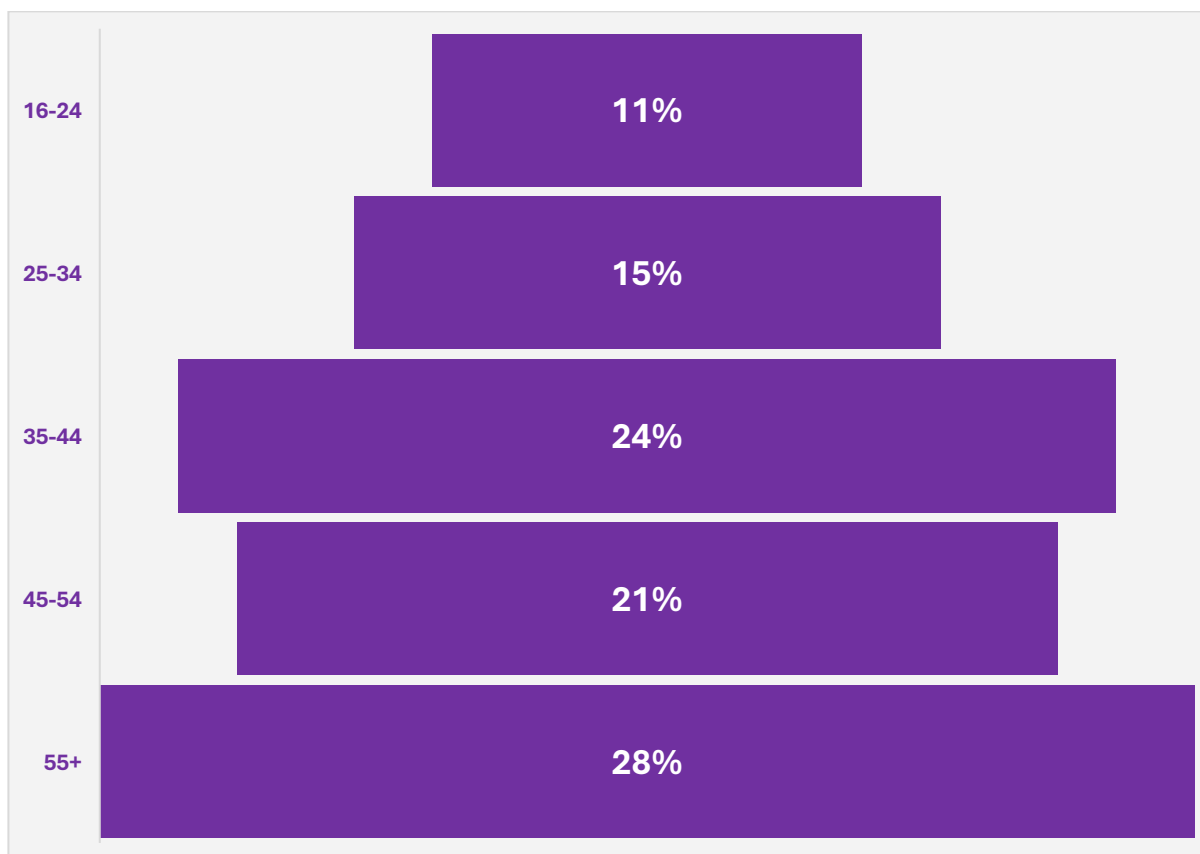


Figure 3: Age of Supporters

Occupational Class	%	Count
Semi or Unskilled Manual Work	6.5%	23
Skilled Manual Work	3.4%	12
Supervisory or Clerical	19.3%	68
Intermediate Professional	25.3%	89
Higher Professional and managerial	9.4%	33
Student	8.2%	29
Retired	4.8%	17
Unemployed	6.5%	23
Other	8.5%	30

Table 1: Occupational Social Class of Supporters at SWPL Matches

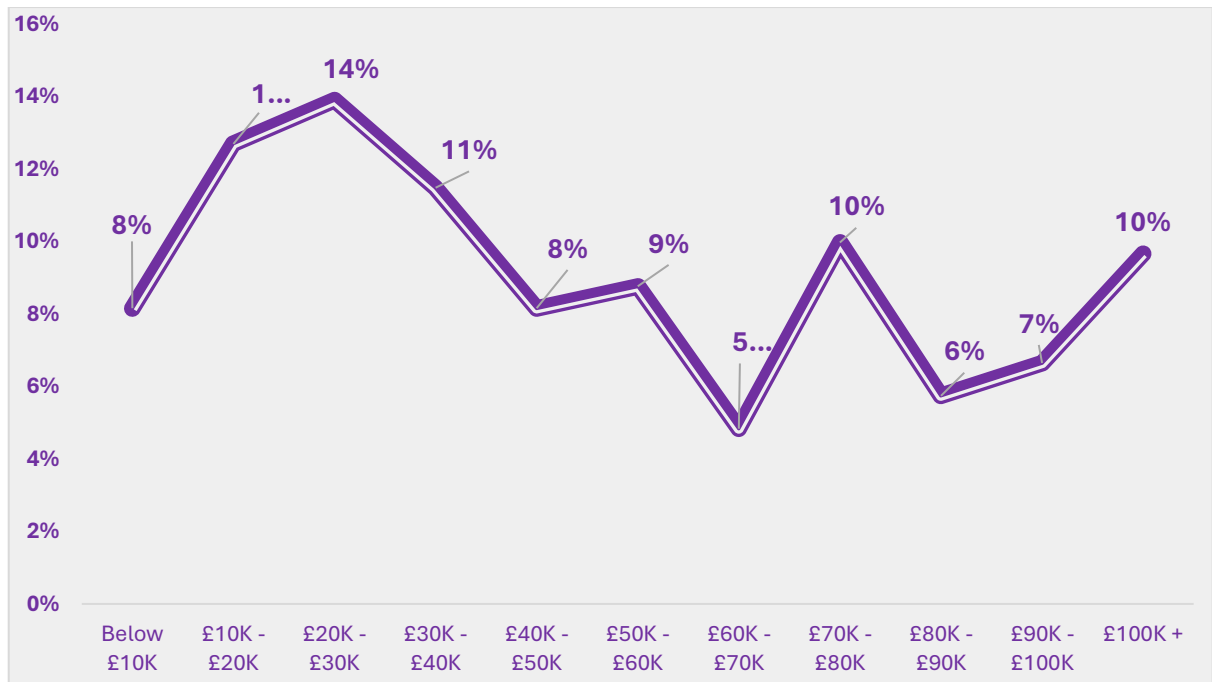


Figure 4: Household Income of Supporters

- 55% of the fans were female and 42% were male. 1% preferred not to say and 2% identified as non-binary or third gender.
- The current fan base is predominantly from age cohorts above 35yrs. 24% are between the ages of 35-44yrs, 21% are aged between 45-54yrs and 28% are aged above 55yrs. 15% are between the ages of 25 and 34yrs and 11% between 16 and 24yrs.
- 93% identified as white British which is 3% smaller than the Scottish national average.
- 64% held a college, university, or post-graduate degree. 17.5% hold a post-graduate degree. Whilst 15% reported as having only secondary level or lower qualifications.
- 35% of fans reported as having professional occupations. 19% held supervisory positions.
- The majority of fans reported a household income of above 20k per annum. More than 10% reported household income of between 90 and 100k per annum. In addition, 47% reported a household income above 50K per annum.

56. These points support the assumption that the SWPL is consumed by a solidly middle-class audience.

57. An observation that is further supported by the *Hampden Nights* research on the SWNT fans supporting international matches at Hampden in which

- 75% held a college, university, or post-graduate degree.
- 32% held professional occupations, 24% supervisory positions and
- The majority reported a household income of above 20k per annum.
- 12% reported household income of between 90 and 100k.

58. Improving economic mobility is a central goal for public policy. But how? Mobility is a complex, multidimensional issue, related to policies in education and training, housing markets, safety net efficacy, family stability, the labour market and much more. Creating opportunities for cross-class lines, i.e., social mixing across class lines looks to be one of the most promising lines of social mobility. Football could be one such important space.⁴⁸

What do SWPL fans want?

59. It is evident that in context of consuming football that belonging and sharing the experience is important to the SWPL fan base.

	Much less Important than Winning	Less Important than Winning	Equally as Important as Winning	More Important than Winning	Much more Important than Winning
Enjoying the highs and lows of following my club team	4.8%	9.2%	62,2%	14.9%	8.9%
Creating memories	2.1%	7.7%	47.1%	23.9%	17.7%
Feeling a sense of belonging to my town or city's football team	5.5%	9.7%	47.9%	22.0%	14.9%
Showing loyalty/support to my team	2.6%	6.8%	36.1%	27.7%	26.8%
To pass the support of my team onto future generations	5.2%	11.6%	34.5%	22.3%	26.5%
Experiencing the atmosphere at the stadium	4.2%	12.6%	48.2%	17.8%	17.2%
Sharing the experience with my family/friends	4.5%	8.3%	44.2%	19.6%	23.4%

Table 2: The Importance of Winning.

⁴⁸ Reeves, R and Fall, C. (2022). Seven key takeaways from Chetty's new research on friendship and economic mobility. Brookings Institute. - <https://www.brookings.edu/blog/up-front/2022/08/02/7-key-takeaways-from-chettys-new-research-on-friendship-and-economic-mobility/>

- 87% reported that sharing the experience with family or friends was equally, more or much more important than winning.
- 25% of respondents believed that showing loyalty to their club team was much more important than winning.
- 49% thought that socialising future generations of supporters, for their club, was more or much more important than winning.
- 43% highlighted that sharing experiences with family and friends was more important than the team winning.
- 15% reported a sense of belonging to a place as being much more important than winning.
- 64% strongly agreed that nothing can beat the match experience.

When asked to rank different fan statements the rank order reported was as follows:

- *Nothing can beat the live football match experience.
- *Going to watch football is a big part of my usual weekly routine (52% Strongly Agree)
- *My club plays an important part in the community (52% Strongly Agree)
- *Football is an important part of family life (50% Strongly Agree)
- *My club results mean more to me than my national team results (40% Strongly Agree)

60. Again, the observations are supported by our *Hampden Nights research* concerning what the SWNT fans wanted at Hampden⁴⁹.

- Creating a positive match atmosphere in the stadium is vital.
- 61% strongly agreed that nothing can beat the match experience.
- 76% agreed that the atmosphere in Hampden was important.
- 80% reported that creating a positive stadium atmosphere is very/extremely important.
- 73% identified that SWNT was very or extremely important for them.
- A number of factors are identified as being more important than winning.
- 88% reported that sharing the experience with family or friends was equally, more or much more important than winning.
- 22% reported loyalty and support for the team as more important than winning.

61. The responses support the observation that for both SWPL and SWNT fans that it is not always about winning. It is also about friendship, loyalty and belonging. This is something that is worth reflecting upon when it comes to one of the continual debates within Scottish football concerning which stadiums should both SWNT and SWPL teams play. A debate which often gets polarised as either/or rather than a balanced approach which can be win-win for all the stakeholders.⁵⁰

62. Raising the profile of the women's game has always been a fundamental factor to its growth, pivotal to attracting sponsorship and a sharing of the economic benefits. 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. In England it took time to get the crowds to where they are now, and it will take time in Scotland to grow professional women's football crowds at an elite

⁴⁹ University of Edinburgh Academy of Sport (2023). *Hampden Nights: Scottish Women's National Football Team Fan Survey*. Edinburgh: University of Edinburgh.

⁵⁰ Marshall, C. (2024). Hampden is Home Bittersweet Home. *Nutmeg* 32 (June) 2024: pp145-149.

level. Of the SWPL Clubs only Hamilton, Kilmarnock and Glasgow City play at the club's main stadiums.

63. 87% of SWPL club fans reported that sharing the experience with family or friends was equally, more or much more important than winning. Atmosphere is important and that is created in many cases by playing in smaller grounds. Increased visibility is also important for growth and in many cases that comes with playing derbies or important matches in some of the bigger stadiums.
64. The key word here is **a balanced approach** to fixtures and programming that provides for greater visibility and atmosphere at this stage in the development of elite professional women's football in Scotland. Such observations lead to a logical conclusion that rather than debate either or scenarios that both scenarios should be encouraged for clubs with maybe an agreed quota of matches for each club to be played in the parent club or bigger stadiums.
65. A balanced approach seems also to be the answer to the Hampden question.⁵¹ The SFA as the owners of the stadium and the SWNT as the players and the fans all have to be supported. Since 2021 Hampden has been home to SWNT. Prior to 2021 SWNT had only played at Hampden twice. Attendances at Hampden for SWNT matches have been five figures on three occasions.⁵²
66. 7,176 watched Scotland beat Hungary at Easter Road in the Euro 2025 play of match in October 2024. 8,790 watched Scotland versus Finland at Easter Road in the Euro 2025 play of match in November 2024.
67. Positive atmosphere, financial return for stakeholders, and the importance of winning and more are all important factors that need to be considered on a situation or case by case basis. Should SWNT play at Hampden or other significant grounds? The answer is probably both, not either or, depending on the situation- in other words a balanced approach that supports the SFA, SWNT and some of the clubs. Ground requirements rule out some venues and the SFA require a financial return for the upkeep of Hampden regardless of both the opportunities and the challenges.
68. If a positive atmosphere, somewhere where the players feel most comfortable playing, competitive advantage, compliance with ground regulations and financial return are pivotal to help SWNT qualify for future competitions such as the FIFA Women's World Cup then it makes sense to play some matches at Hampden and some matches at other grounds where the grounds are packed for a crucial qualifier.
69. Success matters for SWNT but so does atmosphere with the SWNT fans survey reporting that 80% agreed that creating a positive stadium atmosphere was very or extremely important. 76 % agreed that atmosphere in Hampden was important.
70. Hampden is and should remain the official home of SWNT, generations of women have fought for the right to play there representing their country. Financial growth follows increased visibility for both the national team and the club teams. At this stage in the growth of the game playing some of the games at Lesser Hampden might also have been another option.

⁵¹ Marshall, C. (2024). Hampden is Home Bittersweet Home. Nutmeg 32 (June) 2024: pp145-149.

⁵² Marshall, C. (2024). Hampden is Home Bittersweet Home. Nutmeg 32 (June) 2024: pp145-149.

71. A balanced approach to the question of bigger and smaller stadiums being part of the mix in this stage in the development of professional elite women's football seems to be the solution **at this moment in time** until increased visibility, financial return and increased crowd numbers become the norm- as they do elsewhere. Where the SWNT players feel gives them a competitive advantage is also part of this balancing mix. Players voices are important.
72. The survey results for the SWPL Club Game are also amplified by what the SWPL Club fans are saying? [Focus Group Interviews]
- “*It* feels nice to go there because it’s a relatively small community of people who come every week. You recognize people, you say hi, you ask how they’ve been and stuff like that. It’s just a nice way to spend a Sunday afternoon”
 - “You go to spend the afternoon with people that you stand with all season at the home games. You strike up these nice friendships, and it’s great to see familiar faces down at the same place where we stand each week, or every other week, cheering on our favourite team.”
 - “I think there are things, though, where women’s football and the fan experience are modelled on the men’s game, which has been shaped by things like heavy policing. For example, there’s no alcohol in any stadiums. That’s not something that’s particularly important to me, but it does say something about how the experience could be a more social space. People might want to hang out in stadiums for longer. You might make a whole day of being in the stadium, for example, eating food, socializing, watching the game. Whereas because these things are modelled on the men's game where it's essentially all to do with crowd control and prevention of, I guess violence, really. But it just, it just doesn't have to have to be like that. You know, if we were setting up women’s football from the start, you wouldn’t do it like that. You’d create a much more sociable space”.
 - “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”.

Attendance and Ticketing

73. There are differing motivations for attending SWPL football matches.
- From the club fans surveyed here, 77% reported that they enjoy the atmosphere in the stadium and amongst the fans, as a main reason for attending. 68% reported that it was important to show loyalty to their club.
 - 50% identified that attendance was the main or perhaps the only way to watch their club.
 - A social dimension was identified as significant with 47% being motivated by a desire to spend time with family and friends.⁵³
 - When supporters were asked, to what extent factors influenced their decision to attend a home game for their clubs, infrastructure and time constraints were the

⁵³ There are various motivations for attending matchdays for fans.

biggest factors. 29% reported that they would not attend (have a big influence on staying away) if the distance was too far.

- 20% reported that kick off time would also influence their attendance, and a further 15% reported an adverse weather forecast would influence attendance.
- Interestingly, and going against a popular narrative on the relationship between TV and attendance, only 8% reported that their club being on TV would result in a big influence in not attending.
- The top five factors which were extremely important when purchasing a ticket for a club game were having the ability to order tickets online, attitude of club staff, the ease of buying tickets, clear release dates of fixtures, and clear pricing structures.
- 76% of the respondents to the survey 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.
- 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.

74. When consuming football, whilst the actual game is highly significant, as illustrated below, there are other experiences available which perhaps need further communication. 42% were aware of mascot opportunities. 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.

75. Again, the survey results are amplified by what the SWPL Club fans are saying? [Focus Group Interviews]

- “And then, my biggest pet peeve is about ticketing. What annoys me with any away game is that you've got to have an account for Rangers, an account for Celtic, and an account for another club. There really need 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. I don't even remember the logins anymore, so I just keep making new accounts. It's such a pain in the bum, honestly”.
- “For midweek evening games, if they want to do them, that's all fine. If make it a Glasgow team playing another Glasgow. Not having to travel over to Edinburgh. The time to get over there, you probably come off the tail end of rush hour, and then when you're finished, you've got to drive all the way back again. So, I think they really need to consider—if they're doing midweek late evening games—you want to make it so the fans don't have to go so far, and it's easy to get to for fans”.
- “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, Hearts' ground—the station is just really not close to the ground at all. So, you've got a really long walk, a properly substantial walk”.
- “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 do agree that there are plenty of Sundays throughout the season where we can fit games in, rather than scheduling midweek matches”.

- “I’d love a central ticketing system because, as I’m saying, going to every game, I’ve had to make a Hearts account and I’ve had to do all that.....Quite a few clubs use Fanbase, which is a kind of central one, and it’s quite good”.

“I think the season tickets—I don’t know how many of us have them—but I just turn up, and I’ve got two things on my phone, one for my dad and one for me. They just scan it at the gate, and through you go. It takes seconds, and really, you’re on the field so It’s good”.

- “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”.

Matchday Experience

76. Increasingly, in a society structured around consumer culture and consumption, matchday experience has taken on greater significance. Creating a positive match atmosphere in the stadium is vital. 72% of fans agree a lot or a great deal that experiencing the atmosphere in the stadium is important to them. 71% believe a lot and a great deal about the football club gives them a sense of belonging. 65% see it as important as a focal point for the local community.

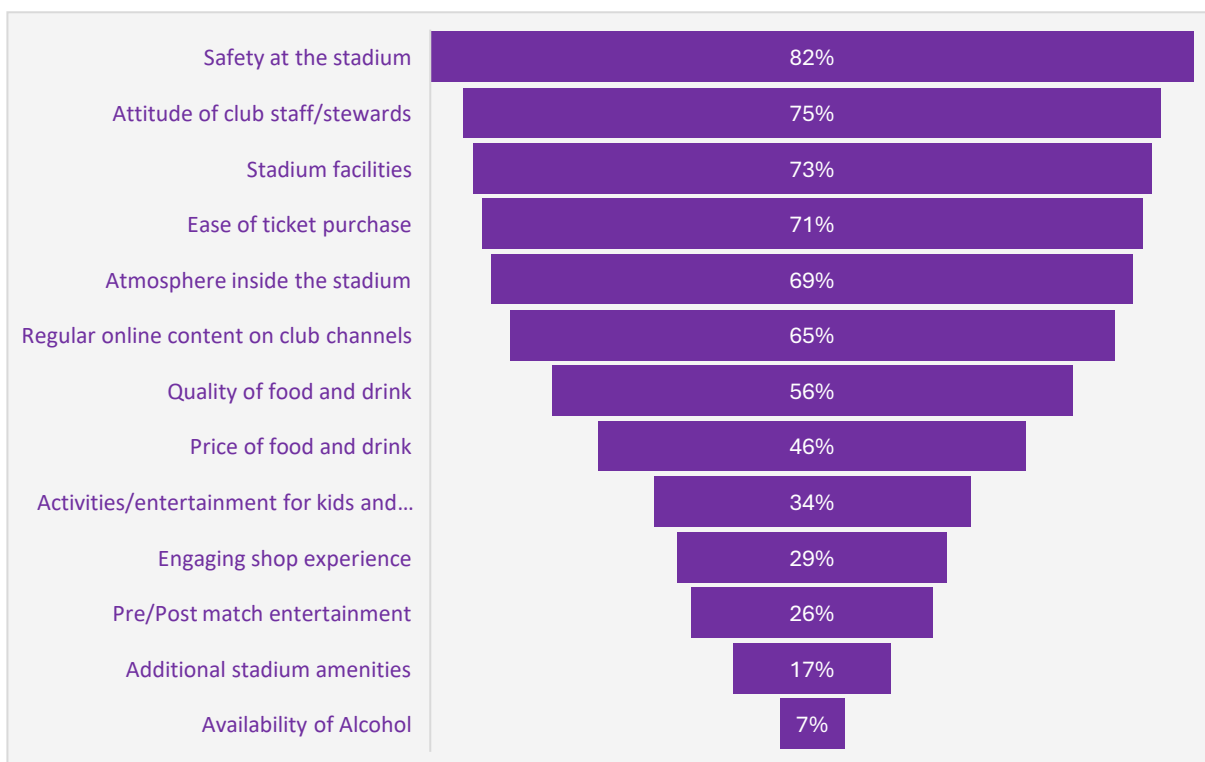


Figure 5: Factors Influencing Positive Matchday Experience at SWPL Matches



Figure 6: Feelings of Belonging and Community

- When asked about SWPL, 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 (10 being the best)).
- 49% reported never hearing abusive language or aggressive behaviour with a further 40% only occasionally witnessing it.
- 57% supporters reported that they usually get to the stadium 30mins before kick-off. 11% arrive at kick-off.
- 42% go straight to a seat in the stadium.
- 32% purchase soft drinks or food, and 11% visit the club shop.
- Very few reported drinking alcoholic drinks.
- When asked what would make fans arrive earlier, 32% reported a fan zone and a further 26% reported access to a family zone.
- 26% would be tempted to arrive earlier to visit a club shop.
- 30% report that purchasing food and drink in the stadium would tempt them to arrive earlier.
- 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.
- 72% of fans agree a lot or a great deal that experiencing the atmosphere in the stadium is important to them.
- 71% believe a lot and a great deal about the football club gives them a sense of belonging.
- 65% see it as important as a focal point for the local community.
- 91% of respondents feel safe within the stadiums, which is impressive. This is supported by the feelings of how supporters view stewarding at their clubs, with 63% of supporters rating the clubs positively.

77. Again, the survey results are amplified by what the SWPL fans are saying? [Focus Group Interviews]

- “So, winning is important, but to me, it's more important to be going to the games, enjoying the games with my friends.”
- “But I also love the drama when we're not winning It's that drama. So, yeah, you just never know which way football is going to go, and I love that—I love not knowing.”
- “But yeah, winning is fun if we can do it, and we're having a good run of it this year. But it's not everything.”
- “For Celtic and Rangers men's fans, they need to be winning. The emotions in the men's game, especially for Old Firm fans in Scotland, are quite fragile. They definitely bring that into their mood, and it impacts the workplace. We certainly don't have that same sort of thing in the women's game, and that's not what it's about for me. It's about going and meeting up with friends, very much so. The atmosphere among fans.”
- “I quite like our place as a stadium because it's small enough that you can feel as if there's atmosphere. You're close to the pitch, you can hear the people in the crowd, the players on the pitch, and the referee, and I like that.”
- “I think we're quite lucky from that point of view, and it might bring more people in. I know I went to one of the Celtic games when they were playing at Airdrie. They had fans who were completely bewildered—they had no idea where they were. They got a train to Airdrie train station and then had to walk for 45 minutes to get to the stadium. It was horrible for them”.
- “If I could just follow on from what was being said about stadium rules, I think that's something I'd really like to see changed. We've followed on from the men's game, where certain things are banned. For example, at the Cup Final last season—the Women's Cup Final—I was outside and saw a woman with a small child, and the stewards were making her throw away a water bottle. She wasn't even allowed to take it in. That was because of Stadium rules, which are based on men's football. It's the same at Broadwood, Excelsior, and other stadiums. Yes. How I can walk in and then buy a can of juice, you know? So, I think I couldn't do that at any other stadium that has, you know, sort of thing because they follow the men's stadium rules”.
- “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”.

Community and Social Issues

78. Clubs are increasingly an important part of social change in their communities. It is important that clubs are visible.

79. Key aspects of increasing fan engagement with women's football in the USA has been (i) *Storytelling*: fans of women's football in the USA have increasingly engaged with content both in- and out-of-season; and (ii) *Purpose-led conversations*: women's football putting their values on display and engage/ buy based on how brands/ media/ teams/ athletes align with those values. Women athletes and fans want to engage with the social issues of the day. Societal topics drive conversation but also increase viewership.

- When asked, 26% of supporters reported that they were very aware of community activities. 16% of supporters identifies that they were not aware of any of the activities the club was engaged in with the local community, and 57% only somewhat aware.
- When asked how well the clubs did on engaging on big social issues the results returned were relatively mixed, some positive and negatives.
- 32% reported that their club did very well. The clubs were seen as being very effective in engaging well on LGBT community issues.
- 28% of survey respondents reported a negative score for tackling the environment.
- On sectarianism 26% felt the club did not adequately engage well on this issue.
- We asked supporters about whether they would like to be part of women's club supporters' network. Overwhelmingly the majority of fans reacted positively to the idea.

80. Such findings are reinforced by what SWPL Club fans are saying. [Focus Group Interviews]

- "I guess it depends on how you're defining community. 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".
- "Just quickly on that, I think the big thing they're doing this year, which is great community-wise, is giving away free tickets to groups, schools, etc. I've seen a lot of lower league men's teams do the same thing, and it really does work. You've got, like, 25 kids turn up and have a great day. Two of them might come back another day with their mums, dads, or families. It's always going to be a small percentage of retention, but you're going to get some retention out of that. They've started doing that now, and I really hope we'll start seeing kids come in, bringing friends and families through this free ticket thing".
- "I think our club leads the way in women's football with things like supporting the LGBTQ+ community, the red card to racism initiative, and not allowing sponsors from gambling companies. They've been open about these stances, both online and at games, as well as when putting the message out to the community".
- "I think it's been evident from quite an early time that we support mental health charities, and we've done that for many years. We've worked with Breathing Space and have 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".
- "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. Maybe have a little platter or something, or even something at halftime and afterwards. You could make a whole day of it—go in for a meal, have drinks on-site, and stay before the game, during the game, and even after the game if you want. There are opportunities to do that. I think we haven't really utilizedI'd love

to see something like that, and I'd pay extra for that kind of experience. I think it'd be really, really good”.

- “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”.

81. When asked how well the SNWT fans were on engaging on big social issues the results returned were relatively mixed, some positive and some negative⁵⁴.

- 79% of supporters agree or strongly agree that the National Team plays an important role in the community.
- Given that the majority of SWNT supporters travel to the match by car (62%). This has implications when thinking of ways that the city and football can be more environmentally aware.
- 45% of survey respondents reported a negative score for tackling the environment.
- In relation to racism, 28% reported that SWNT did very well, whilst 20% stated the opposite.
- This negative outlook is also reflected in how well SNWT are doing with issues around sectarianism, with 46% identifying that they are doing slightly well or not well at all.
- In relation to supporting the LGBT+ community, fans agreed (49%) that the SWNT were doing very or extremely well.

Communication Media Technology

82. When SWPL respondents were asked about where they go for their main source of information about the club they support, the results confirm a changing media environment. The traditional means of communication through TV, Radio, and Newspapers scores very low.

83. There is perhaps a lack of exposure of the women’s game on these mediums. Results show that Web 2.0 and social media platforms are now go to formats for information.

	Not at all useful	Slightly useful	Moderately useful	Very useful	Extremely useful
Official Club Website	3%	5%	24%	36%	27%
Official Club Twitter	11%	8%	16%	36%	27%

⁵⁴ University of Edinburgh Academy of Sport (2023). Hampden Nights: Scottish Women's National Football Team Fan Survey. Edinburgh: University of Edinburgh.

Official Club Facebook	20%	13%	22%	24%	22%
Official Club Instagram	20%	9%	22%	20%	29%
BBC Sport online	26%	22%	32%	16%	5%
Receive emails from the club	8%	12%	24%	33%	22%
Local radio	60%	17%	14%	4%	4%
Unofficial website / message boards	36%	13%	26%	16%	9%
Local newspaper(s)	65%	13%	15%	5%	2%
Sky Sports online	50%	19%	19%	7%	5%
TV	36%	22%	18%	15%	9%
Other sports news sites	46%	18%	22%	9%	5%
Club publications (e.g. programmes, magazines)	28%	19%	25%	19%	9%
National newspaper(s)	65%	12%	16%	5%	3%
National radio	65%	13%	15%	4%	3%
Attend fan forums	37%	14%	15%	16%	8%
Other	47%	10%	28%	10%	6%

Table 3: Which of the following sources do you find useful in finding information about the club you support?

- 63% of supporters identified club website and twitter as important platforms. Facebook also scored highly with 46% of supports rating this club source as very or extremely useful.
- 29% of respondents reported Instagram as an extremely useful source of information.
- When asked about the types of content accessed online during a typical matchday – a significant number of supporters gather information of the team line ups (33%), followed by team and player statistics (16%). In general, there was relatively limited engagement on a matchday.
- During the game itself (including Half Time) respondents claimed they access their phone and predominantly use Twitter (25%), followed by Instagram (13%), and then Facebook (11%).
- TV coverage of SWPL is vital for growing the audience of the game, and a key means to consume club games for the supporters surveyed. 48% of fans surveyed, report that they liked to watch any SWPL game, even if their team is not featured,

measured against 23% who would only watch their club. 23% report that they only watch SWPL games featuring their own team and the 'big games' (e.g. cup finals, local derbies).

- 38% of respondents agreed that their team being televised gives them a chance to watch when they cannot attend.
- 24% of respondents reported that they liked the coverage and exposure their club gets when on TV.

84. Again, the survey results are amplified by what are the SWPL Club fans saying? [Focus Group Interviews]

- “There’s been a new comms person at the club this year, and I think he’s been a lot more prominent than in previous years. There’s a lot more coming out on social media, and I’d argue it’s perhaps a bit more engaging. It’s not like they are putting out teams all the time but there’s definitely a focus on pulling in culturally important things. He’s also linking in with initiatives like giving tickets to school kids, but also to people who play in community sports teams”.
- “I’d like the supporters' clubs of the different teams to work together. I think there’s already some collaboration happening, like with the women’s teams at Celtic and Rangers, but I think it would be useful to have a kind of supporters' club group. but just a group of people who get together to talk about what they can do across the board”.

Importance of Place

85. Place matters to football fans. Football and place share an important connection. Football clubs often embody the city/town and act as a symbol and are embedded in the everyday culture of its population. There continues to be a debate with Scottish clubs about where women’s club matches are played. The number of games played at the main club owned stadium varies from club to club. Some women’s teams do not play in the same town or city as the men’s team or the club owned stadium. Financial considerations and atmosphere are important but so too is a sense of place and belonging for women’s teams and their fan base.

86. We asked SWPL fans about the home ground their matches were played at but also about the Town or City in which the home ground was located.

87. Compared to other fan surveys, the supports here have less affection for the city or town in which the clubs play. Given that place identity is an important element of fandom and place branding this is an interesting finding and will probably need to be investigated further to understand the deeper malaise and disconnection. However, that is not to say that place is not important to these supporters, just not as deep as other fan surveys.

88. 33% of supporters strongly disagree with the statement that they have no love for the place. A further 38% reject the assumption that they don’t belong to a place.

89. Just over three fifths of respondents reacted positively to the statement around what happens in the town or city is important to them. Two fifths have an emotional connection to the town of city in which their club plays.

- 90.** 33% of supporters would be willing to invest more time or effort to make this an even better place. However, 19% of respondents would be unwilling to give financial contributions to improve the city or town.
- 91.** The feeling of placelessness was reflected in the negative responses to whether they identify strongly with the stadium (49%).
- 92.** 43% of supporters somewhat or strongly agreed that they would enjoy another stadium as much as their own. 47% of supporters strongly disagreed that they would never enjoy watching my club from another home stadium.

SWNT and Place

- 93.** When it comes to the women's national team a sense of place and identity is strong.
- 94.** 78% of supporters agreed with the statement that feeling a sense of belonging to their countries National Football Team mattered a lot to them.
- 95.** 86% thought it was very or extremely important for Scotland.
- 96.** Thinking about Scotland, 73% disagreed with the statement that they have no particular love for the place.
- 97.** 84% rejected the idea that they sometimes feel they don't belong to Scotland.
- 98.** 70% agreed that they identified with the physical landscape of Scotland.
- 99.** 31% agreed that they would be willing to make a greater financial contribution to making Scotland a better place.
- 100.** When asked about the home ground in which the SWPL clubs played fans offered the following comments [Focus Group Interviews]
- “When we go to the bigger grounds, people have too much room, they disperse, and it loses the atmosphere. I think it loses some of the appeal”
 - “I'd rather sell out a 10,000-seater than have 10,000 people in a 30,000-seater stadium”.
 - “For those bigger games, yes, you might get more people watching on TV. But it doesn't look very good when it's just echoes in a giant stadium. I think it sort of belittles the women's game”.
 - “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,”.

Online Engagement and Sentiment Towards Women’s Football⁵⁵

- 101.** The final section of this report presents the findings from social media analysis. Social media links between SWPL clubs can be further leveraged to foster a larger online community engagement overall.
 - 102.** A traditional monetisation model for the football industry is often based on audiences, events, reach, and impressions, while a community-based monetisation model is driven by, for example, storytelling, conversations, access, and direct-to-consumer commerce. Both are important.
 - 103.** Understanding Scottish football communities’ online behaviour better has the potential of developing a much more communities focused model that could unlock powerful new ways to produce, distribute, and measure football engagement and relationships based upon what fans and communities, including online communities want. Women’s sports in the USA have been driving this community-based monetisation model successfully.⁵⁶ The premise being that women’s football fans are more likely to drive community-based behaviours.
 - 104.** The analysis of aspects of social media behaviour and sentiment analysis presented here provides an insight into a developing online audience that presents both opportunities and challenges.
 - 105.** Maximising successful global digital sports platforms requires traction of all the major social media platforms — Facebook, Instagram, YouTube, X, TikTok, Weibo and more, along with traditional broadcast outlets. Rather than creating one piece of content and posting it to every platform, content should be tailored for each specific platform in the way users consume their content. These decisions should be based on women’s fan engagement data that is analysed by the club social media team/data analytics team. This happens in many cases but there are shifting patterns of behaviour and in some cases these have still to mature in terms of being all week round self-sustaining audiences.
68. One of the immediate ways this can be supported is in using data-driven information and innovation specifically targeted at helping SWPL football clubs better understand the attitudes of their fan base. Sentiment analysis helps with this. Sentiment analysis tells us about the sentiment towards social media conversations about Scottish women’s football in terms of it being neutral, positive or negative.

⁵⁵ Please note that a more detailed 14-page 2024 SWPL Online Engagement and Sentiment Analysis Report is available.

⁵⁶ See The Fan Project Report (2020). How Women’s Sports Will Lead the Sports Industry into the Future. This has helped to shift the dial in the USA from an industry move on from “why should we invest in women’s soccer?” to “how should we best invest in women’s soccer?”.

Key Headlines

- @CelticFCWomen, @RangersWFC, and @SWPL tended to dominate the 2024 conversation, with significant growth since the 2021 baseline.
- Total engagement is 51.3% higher in 2024 than it was in 2021.
- Conversation around all keywords is much higher than in 2021, aside from @GlasgowCityFC. This indicates that other clubs' growth has partially come at Glasgow City's expense.
- While matchdays lead to a large boost in engagement (up to 7x normal volumes), the larger accounts have self-sustaining inter-match conversation.
- Despite growing interest, the accounts of Aberdeen, Hibernian, Glasgow City, and Partick Thistle are not yet self-sustaining online communities and require either matches or specific account activity to drive engagement between matches.
- Fan online sentiment across all clubs is high, and higher than in 2021 where comparisons are available. In general, this is driven by specific non-match positive events, such as celebrations of individuals, celebrations of season-wide performance, and community engagement. Weeks with lower sentiment are driven by poor form and negative news stories
- Emoji usage is overall based on ideas of luck, support, and positivity. However, on a club-by-club basis, there is evidence of community-specific emoji use, particularly in the use of community colours
- YouTube views in 2024 are 31% higher than the same period in 2021, with views spread over time rather than stemming from single videos. This implies a more organic, sustainable, engaged viewership
- Most YouTube views are from the UK, specifically Glasgow. Countries with many Scottish ex-pats (Australia, Canada, Ireland, and Spain) are also well-represented, with significant further views from Brazil, Chile, Latvia, Thailand, and Denmark
- While $\frac{3}{4}$ of 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

Keywords and Community Trends

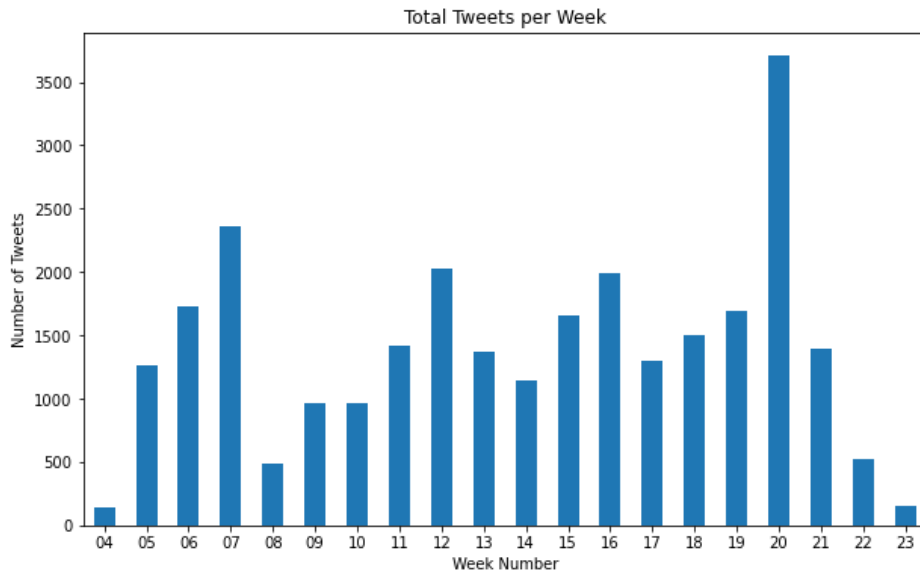


Figure 7: Total Tweets per Week

Keyword	Average weekly tweets	Max weekly tweets	(week beginning)	Context
#COYGIG	177.5	672	07/04/24	Irish women's Euros qualification match vs England
#SWPL	48.3	109	19/05/24	High engagement during last regular game week
@AberdeenWomen	47.9	152	28/04/24	Excitement around the 30/04 Montrose fixture at Pittodrie
@CelticFCWomen	389.7	2226	19/05/24	Celebrations over title win
@GlasgowCityFC	34.3	71	11/02/24	Significant 5-1 away win over Montrose on 11/02
@HibernianWomen	68.9	200	05/05/24	Positive results against Glasgow City (2-2, 05/05) and Hearts (2-0, 10/05)
@RangersWFC	330.1	849	11/02/24	Held to 0-0 draw by Partick Thistle, damaging title chances on 11/02
@SWPL	210.8	967	18/02/24	Discussion of policing and attendance issues in the Celtic vs Rangers draw on 18/02
@ThistleWFC	86.5	818	24/03/24	Support for Ava Easdon following SWPL Cup Final loss

Table 4: Average and Maximum Engagements

- Weekly volumes range from 1000-2500 tweets (only one week in main period outside this range), with more significant games generally driving more interest.
- Three accounts dominated weekly conversation: @CelticFCWomen (390 tweets/week), @RangersWFC (330), and @SWPL (210).
- For the larger teams (in the Championship bracket), match-based events drive the conversation, while specific community events drive conversation for other teams
- Non-matchday daily tweet volumes indicate that Aberdeen (8), Glasgow City (5), Hibernian (6), and Partick Thistle (12) require matches to stimulate conversation, while SWPL (21), Rangers (26), and Celtic (31) have self-sustaining online communities.
- The team-by-team effect of matchdays on engagement volumes is substantial, with up to a 7x boost (@HibernianWomen). This boost is smaller for clubs with lower engagement; @ThistleWFC volumes are the least affected by matchdays, with only a 1.7x boost in engagement
- Community members are similarly engaged across the clubs: the six clubs (plus @SWPL) all registering between 2.0 and 2.9 tweets per person. While larger clubs' most frequent tweeters (e.g. individual dedicated fans for Celtic and Rangers) indicate an active and interested community, the fact that @HibernianWomen is most mentioned by @SWPL in official communications indicates that the club does not yet have a self-sustaining online community fanbase.

Sentiment Analysis

106. Net sentiment measures the overall mood of the fanbase: are they more positive (+100) or negative (-100) on average? Any score above 0 indicates that there is more positive than negative engagement. The emotive score is the proportion of all tweets that are positive or negative compared to the neutral content. This is measured on a scale from 0 (where all engagement is informational and neutral) to 100 (where all engagement is emotive and passionate).

- On average, each club received significantly more positive (36.3% of all tweets) than negative (8.6% of all tweets) engagement, with an overall net sentiment score of +27.6. High net sentiment is driven by specific non-match positive events.
- Only the @SWPL handle and #SWPL tag sees the highest net sentiment week driven by a match or matches. For clubs, the highest net sentiment weeks are driven by season-wide celebrations (Partick Thistle, Celtic, and #COYGIG), news around individuals (Rangers, Hibernian, and Aberdeen), or positive community-focused news (Glasgow City). Conversely, low net sentiment is driven by poor form (Partick Thistle, Rangers, Hibernian, Glasgow City, and Aberdeen) or significantly negative news stories (Celtic, @SWPL).
- The accounts and hashtags received an average emotive score of 44.9%. Unlike consistent trends in net sentiment, there is wide variety in what drives a high emotive score in the SWPL. Glasgow City's most emotive week and their highest net sentiment week both revolved around community initiatives, indicating that this is something the fans feel strongly about. For Partick Thistle and Hibernian, the most emotive week centred around individual players, indicating the growing importance of the players themselves to the women's football brand. Celtic's most emotive week (for both #COYGIG and the club account) focused on specific match

and bot accounts to gain large traction in the community (“betting tips” and “don’t follow” in the context of “don’t know why people don’t follow this betting tips account”). The bot-driven phrase “free game telegram link in bio” is also common across the other teams with lower weekly average tweets (Aberdeen, Partick Thistle, and Glasgow City).

- Other content for these accounts predominantly consists of good luck messaging, player of the week/season nominees, and content around specific players (i.e. Ava for Partick Thistle). For the clubs with larger followings, positivity still dominates the conversation (“congratulations”, “great” etc), and the importance of matches is perhaps clearer than the other teams: “today”, “day”, “goal”, “ticket” are more prevalent for Celtic and Rangers, and indeed Celtic is commonly also mentioned in tweets that mention Rangers.
- We can also look at the average number of emojis per tweet. On average, each tweet sent uses just over 1 emoji. This varies on a club-by-club basis: for @ThistleWFC, there are 0.77 emojis per tweet, while for #COYGIG, there are 1.5.
- The type of emojis that fans use can shine light on the nature of their interactions with the clubs. Across the league, the top 5 most popular are: four-leaf clover 🍀 (2,257 appearances); green heart ❤️ (1,867 appearances); clapping hands 🙌 (1,647 appearances); trophy 🏆 (792 appearances); soccer ball ⚽ (786 appearances). These reinforce the ideas of luck, support, and positivity
- While there are some commonalities across teams (the clapping hands 🙌, general heart use, and the ball ⚽), emoji usage generally points to different types of engagement from the different teams. Some teams are leveraging a club-specific identity with better effect than others: the red circle 🔴 used by both the men’s and women’s team for Aberdeen gives a sense of shared identity (albeit with low volumes, as does the use of flags (Ireland for #COYGIG, UK for @RangersWFC) and club-specific heart colours (green ❤️ for Celtic and Hibernian, blue 💙 for Rangers, orange 🧡 for Glasgow City, red and yellow ❤️🟡 for Partick Thistle). We can also draw contrasts between the more emotive emojis used in club engagement (hearts and hands) versus the more informational characters used in league-wide content (the soccer ball ⚽, the arrow ➡️ for announcements, and the stadium 🏟️ for #SWPL, and the trophy 🏆 for @SWPL). However, the presence of clapping hands 🙌 and laugh-cry face 😂 for @SWPL indicates a different tone between content created by @SWPL and content sent to the account.

YouTube Trends

108. Building a global digital footprint requires an active presence in countries with different languages and cultures. While fans in all countries may understand the sport, telling athlete/women’s football stories requires local language — using a community manager and media partners who can deliver the content in that language is key.

- Average daily views grew by 31% in 2024. The daily high in 2023 was 2040 (11/05 – Celtic vs Glasgow City highlights), compared to a high of 1056 in the 2024 window (25/05 – SWPL2 Play-off Final). This indicates that support in the 2024 season is more sustainable, driven by a higher interest over time rather than specific interest in individual videos.
- UK represents the most active geography by some margin (48,020 views), with a strong showing from the US (1102 views). Other countries in three figures for the

period, in descending order, are: Australia, Canada, Spain, Brazil, Ireland, Chile, Latvia, Thailand, and Denmark.

- Within the UK, much of the viewership unsurprisingly stems from within Scotland: 47.7% tagged with Glasgow locality, 24.0% Edinburgh, 3.7% Dundee, and 2% Aberdeen.
- An additional 22.6% of UK views come from London.

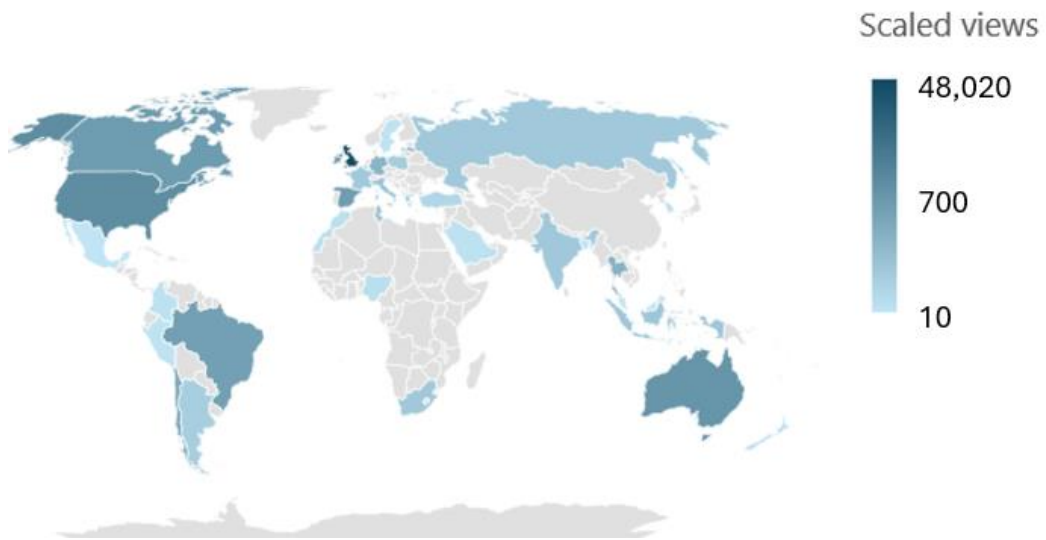


Figure 8: Global YouTube Viewers

- During the 2023 baseline period, 79.43% of viewers were male, compared to 20.48% female. However, female viewers demonstrate a more involved interest, with an average view time of 2:33 minutes compared to 2:12 minutes for men. During the 2024 observation period, the balance equalised slightly, with 76.81% of viewers male and 23.19% of viewers female. With an increased share of the viewership, female engagement with the content remained higher with an average watch length of 2:43 minutes compared with 2:17 minutes for men. We note that watch length increased for men and women, indicating higher engagement across the board during the observation period compared to the baseline
- The average age profile has shifted since the 2023 baseline period, with 52.73% of viewers now under the age of 35 and 23.44% under the age of 25 (compared with 44.74% and 19.92% respectively).

Comparisons with 2021

Keyword	2021	2024	% growth
@AberdeenWomen	11	705	6309
@CelticFCWomen	3812	6352	67
@GlasgowCityFC	1398	483	-65
@HibernianWomen	887	1007	14
@RangersWFC	2507	4149	65

@SWPL	1533	2611	70
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Table 5: Growth in Keyword Popularity

Keyword	2021	2024	Change
@CelticFCWomen	22.6	24.8	2.2
@GlasgowCityFC	33.6	36.9	3.2
@HibernianWomen	23.7	31.9	8.2
@RangersWFC	24.0	25.7	1.7
@SWPL	25.2	27.2	2.1

Table 6: Keyword Net Sentiment over Time

Keyword	2021	2024	Change
@CelticFCWomen	49.1	39.2	-9.9
@GlasgowCityFC	48.9	49.3	0.3
@HibernianWomen	51.6	47.8	-3.9
@RangersWFC	48.3	40.7	-7.6
@SWPL	45.1	42.1	-3.0

Table 7: Keyword Emotive Score over Time

109. To obtain accurate comparisons with the 2021 data, we restricted our data to the same 12-week observation window (the 12 weeks up to and including the final week of the regular season). We also restricted analysis to teams that we tracked in both periods: {@SWPL, @HibernianWomen, @GlasgowCityFC, @CelticFCWomen, @RangersWFC, @AberdeenWomen'}

- There has been a 51.3% growth in total engagement (15,307 unique tweets, compared to 10,148 in 2021). We note that this growth is particularly impressive in light of the decline in popularity of X compared to Twitter, with estimates of user decline of up to 25% over the period.
- While the league in general has grown (including @SWPL engagement), and clubs with an equivalent male team structure have grown significantly, this has been at the expense of the historically popular and successful @GlasgowCityFC, falling from fourth to sixth in engagement among these accounts
- Net sentiment has risen from 25.8 in 2021 to 29.3 in 2024: in general, the conversation around women's football in Scotland is more positive than it was. However, the emotive score has fallen slightly from 48.6 to 43.8. While the increase in net sentiment is well-distributed across the clubs, the fall in emotive scores is largely driven by a significant fall for @CelticFCWomen and @RangersWFC.
- We see this three-stage growth pattern across the clubs: (1) Interest is initially factual and driven by few committed agents; (2) The community becomes more emotive as the early adopter base grows and becomes more passionate; (3) The emotive score balances out as the fanbase grows and pulls in more casual members.

Based on the growth over the period, we speculate that Celtic and Rangers have moved from Stage 2 to Stage 3 between 2021-24, Hibernian is also undergoing this move but at a slower rate, and Glasgow City is stable in Stage 3 due to their longer history

- The number of content creators has grown by 17%, from 4,396 to 5,156. This growth rate is lower than the content growth rate, meaning that content per person has fallen from 2.97 tweets per person in 2021 to 2.31 tweets per person in 2024. This makes sense: as the community grows, it matures from a core of devoted early adopters to a larger body of more casual followers.
- On a club-by-club basis, we again see enormous percentage growth for Aberdeen and a decline for Glasgow City. This reinforces the idea that Glasgow City has not simply been overtaken, but that other teams in the league have poached fans from the club during their own growth periods.
- Perhaps surprisingly, the account with the most significant increase in users is @SWPL, with over 50% growth. This indicates that the number of people taking interest in the league in general is growing at a faster rate than the number taking interest in specific women's teams.

Summary Statement

- 110.** The positive sentiment towards women and girls' football in Scotland continues to grow as does the number attending club matches, receiving an income from the game as it continues to professionalise. Since the SWPL moved to becoming a commercial subsidiary of the SPL, albeit with its own independent board, the commercial income flowing into clubs has increased as TV coverage and sponsorship has increased.
- 111.** The growth of girls and women's professional football in Scotland is at a certain stage of development, not too dissimilar to the process involved in start-up companies or small to medium sized social enterprises. The professional elite game must be given time to grow.
- 112.** The social demographic of the girl and women's game in Scotland is different from the men's game and both games need to diversify but probably in different ways.
- 113.** The leveraging of funding into Scotland through UEFA and FIFA, player trading to and from other leagues, the hosting of international football events in Scotland, the growth of footballers as international ambassadors are just some of the many factors that remind us that Scottish Women's Football does not exist in isolation. Scottish football in general has yet to optimise the extent to which football can enable international engagement.
- 114.** Significant lessons can be learned from the growth of women's football in other parts of the world

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.
- 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.

R016 Supporting further economic mobility through women's football can be improved by creating opportunities for more social mixing across class lines.

R017 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.

R018 The question remains open as to whether a sustained 24/7 online fan culture around women's club teams has emerged.

R019 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.

R020 The number of women whose primary income comes from Scottish football is lower when compared to European nations such as France.

R021 The option of a more centralised ticketing system being made available to more fans should be explored.

R022 Stadiums location removed from the main core fanbase impacts upon achieving optimal fan attendance. SWPL teams that are part of main SPL clubs should where possible increase the quota of SWPL games played in club owned stadiums.

R023 Midweek fixtures for away fans, particularly where public transport routes to the stadium are challenging, can be a deterrent.

R024 The SWPL should continue to benchmark itself against other pro-leagues in terms of provision, trends and competitive balance.

R025 Continued innovation based upon research and development is a key factor in sustainable business growth.