

Lewes FC Fan Survey Insights



Fan Survey Findings

20.10.2022



**The insights in this
report have been drawn
from the June 2022
Lewes F.C. fan survey**

Sample; n = 178



Insights Summary

The fan survey provided the opportunity to better understand Lewes F.C. fans, their experiences and feelings.

This includes both looking at the fan experience in totality and segmenting different parts of the Lewes F.C. community to better understand the behaviour and consistencies or differences between fans.

These key segment included assessing supporters of the men's team, women's team or supporters of both teams. As well as analysing the differences between non-owners, potential owners and current owners.

The insights in this report are structured around the five operating pillars that underpin the club's strategy.

At a glance:

- Fans of the men's team and women's team engage with the team in a different manner - those backing the men's team are more likely to attend games and hold season tickets, whilst those backing the women's team are more likely to livestream games.
- Fans who support both teams have the deepest level of engagement with the club - they are most likely to be an owner and value the clubs ownership model and commitment to equality.
- Merchandise availability at games was the biggest concern for fans about the matchday experience.
- Lewes F.C. are more than just a football club - 63% of Lewes Fans think about the impact of football on society because of the club.
- Equality F.C. is driving a change in sentiment - 73% of the Lewes F.C. men's team supporters state they think about gender equality more now than they did five years ago.

1. Quality Winning Football

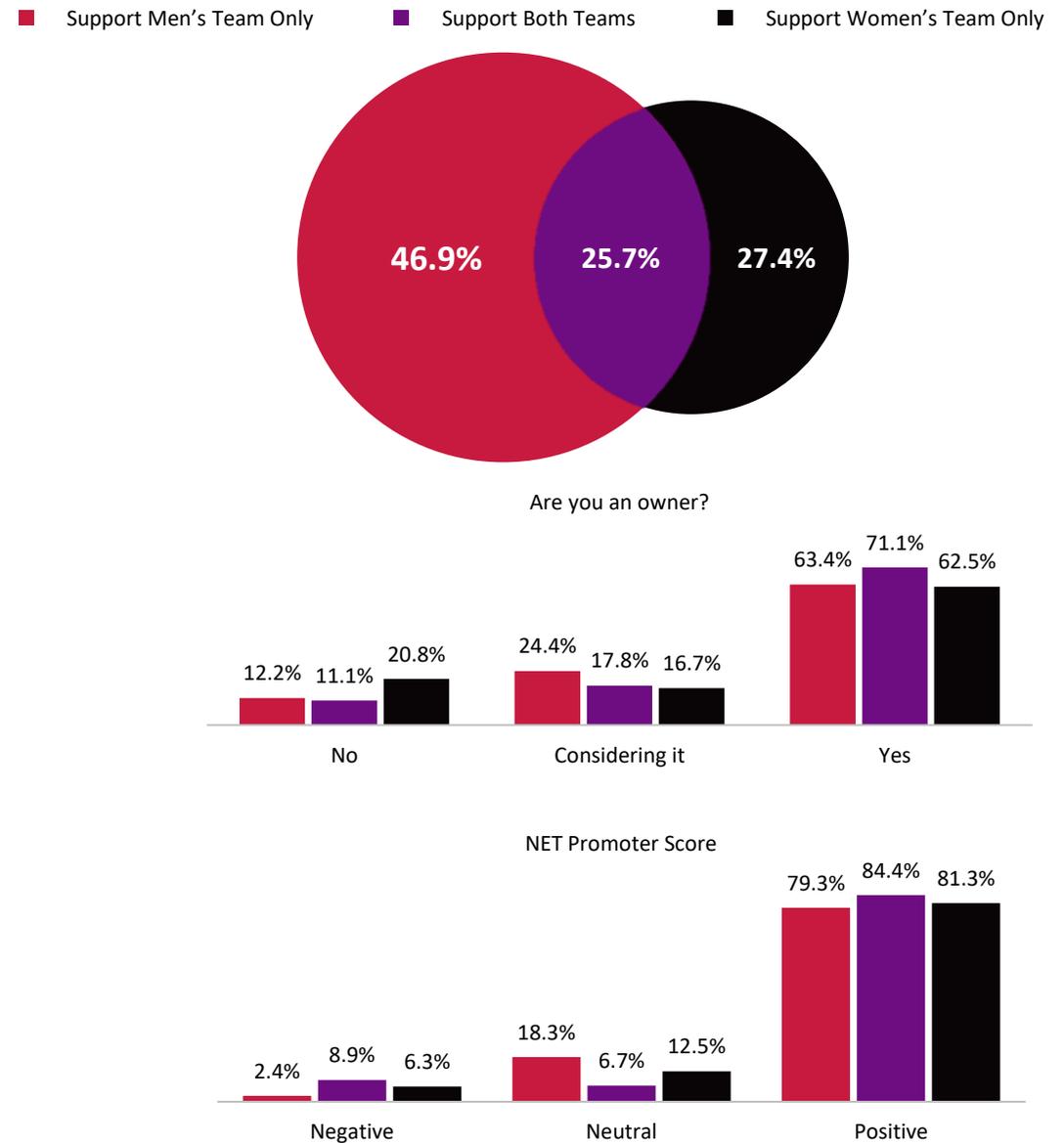
Team Supporter Insights

Supporters have a high level of satisfaction with the club

The Venn diagram shows the distribution of the Lewes F.C. fan base in terms of team support. The women's team has strong backing, with 53.1% of fans supporting the women's team in some capacity (whether supporting both sides or just the women's team). There are still however, a large cohort of fans who only support the men's team.

Ownership is comparable among the groups supporting solely one team, though there is an uptick in ownership if fans are engaged with both teams. At this stage there are more potential owners among the men's team supporters, with almost one quarter of those supporting the men only considering ownership.

For overall satisfaction, a higher proportion of the supporters who are engaged with both teams sit at the peak of the scale (a 10-point NPS scale). Pleasingly, there are very few fans of any kind who have a negative level of loyalty/satisfaction - which is a brilliant result.

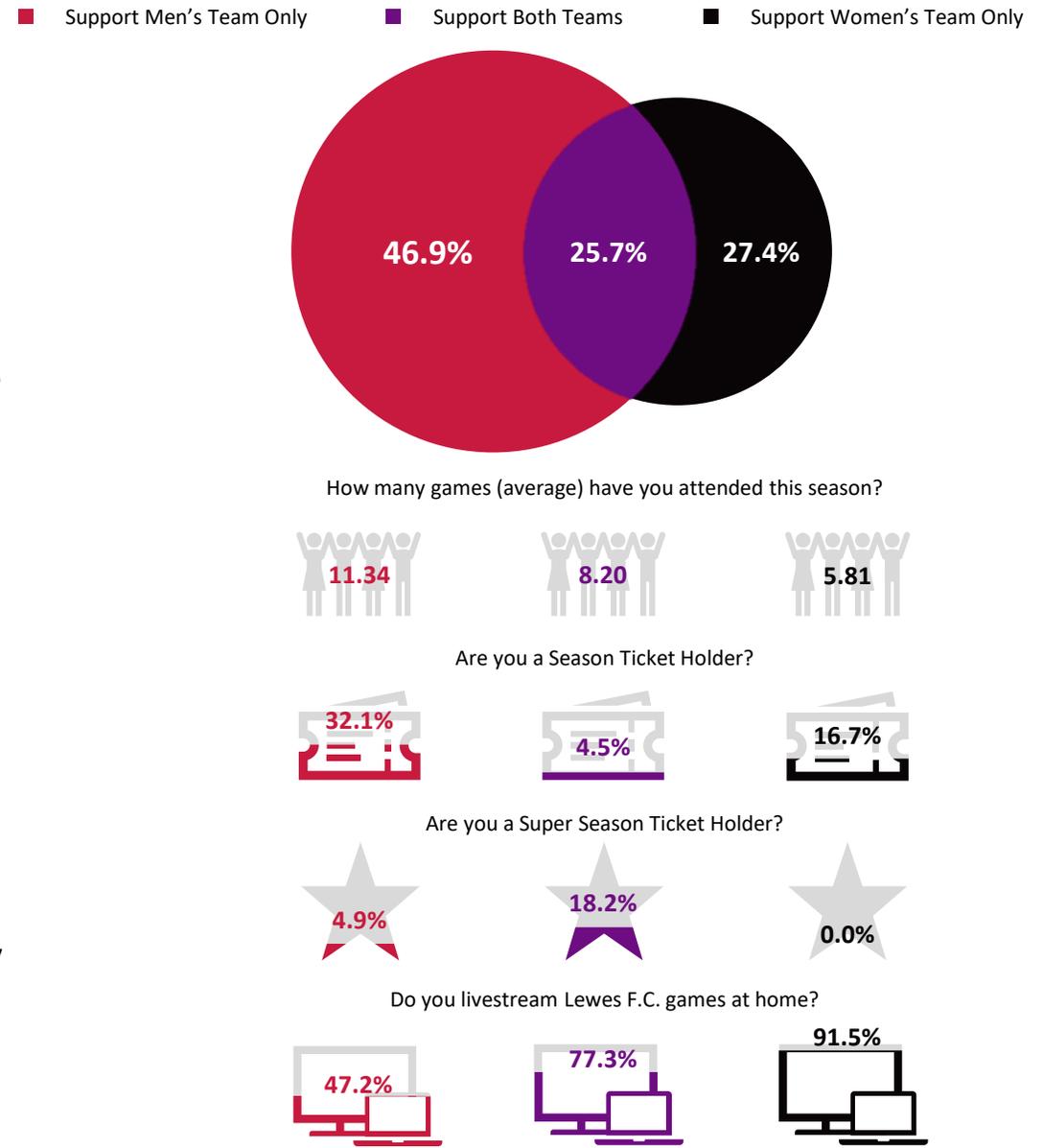


Men's team supporters are keener attendees but less likely to stream games

Attendance favours the men's team supporters only, who attended 95.1% more games last season on average. Though it is worth noting that there are not an equal number of home games for the men's and women's teams. The supporters of the men's team are also currently more likely to hold a season ticket. Supporters of both teams are by far the most likely to be super season ticket holder.

Streaming behaviour is, however, much more in favour of supporters of the women's team. Women's team only supporters are +97.8% more likely to have livestreamed a Lewes F.C. game from their TV or laptop at home last season.

These insights show some interesting distinctions between the behaviour of fans. Driving live attendance is a challenge currently for those supporting the women's team only - however, we have seen in our research that women's sport supporters often gravitate towards digital and social channels. By necessity in previous years, these fan communities had to find alternate means to consume their favoured sports as the mainstream supply was insufficient. But these experiences have become seminal in how these communities continue to consume sport.



2. Full Financial Sustainability

Ownership Model Insights

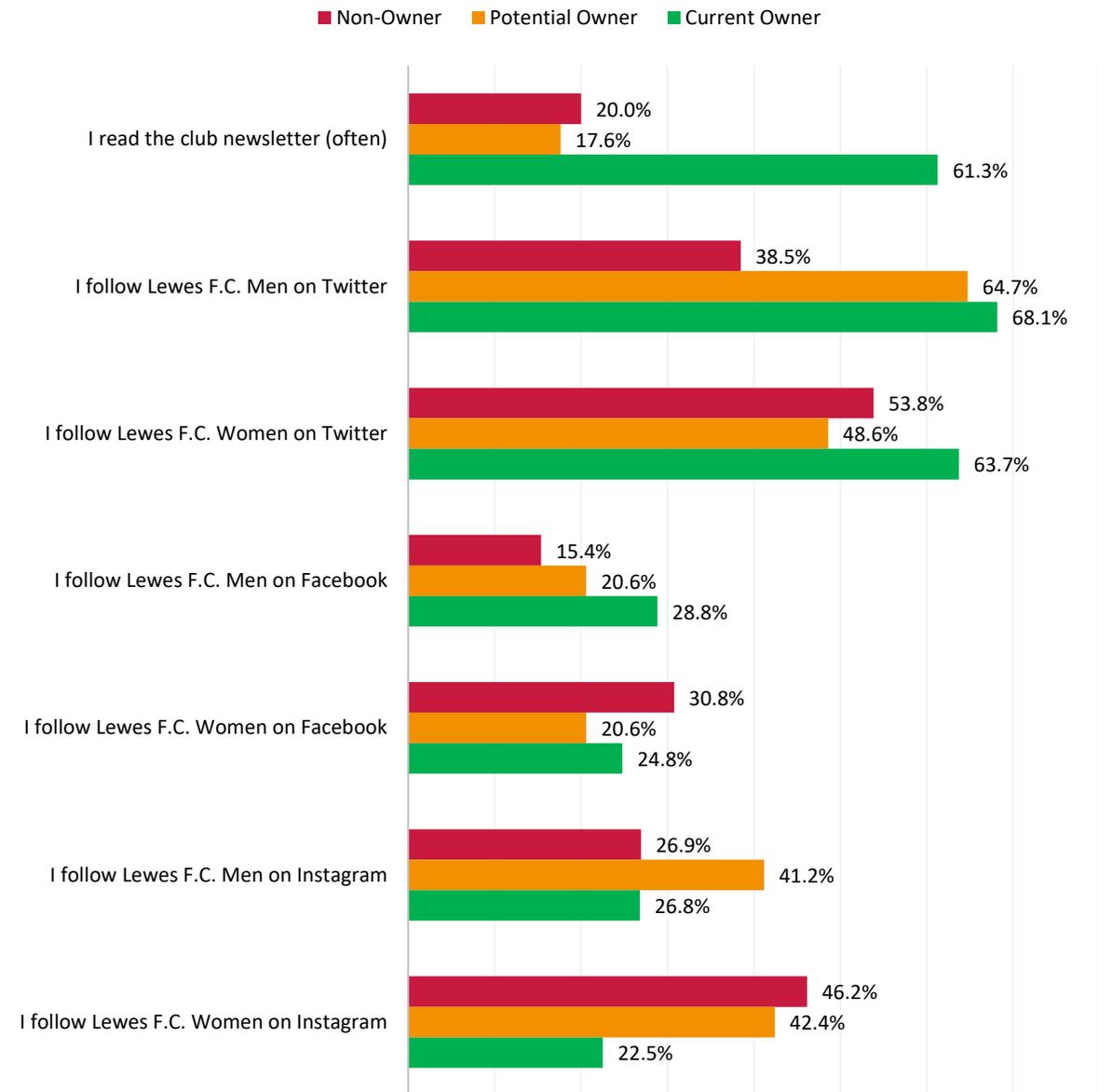
Club communications are typically resonating more with owners

The club newsletter has much more engagement among owners than the other two comparative cohorts here i.e. non-owners and potential owners (those considering ownership).

Social media engagement is less black and white comparatively. Twitter is the most popular channel across the board and Owners are the most engaged through this channel - so this is an effective means of engaging with your owners.

However, club content directed through Facebook and Instagram may not be the most effective means of interacting with owners. Non-owners are more likely to be following the Women's team on Facebook and more likely to be following both teams on Instagram.

Meanwhile, to convert potential owners Lewes would be advised to consider Twitter and Instagram. Potential Owners are the more likely to follow both teams on Instagram than Owners.

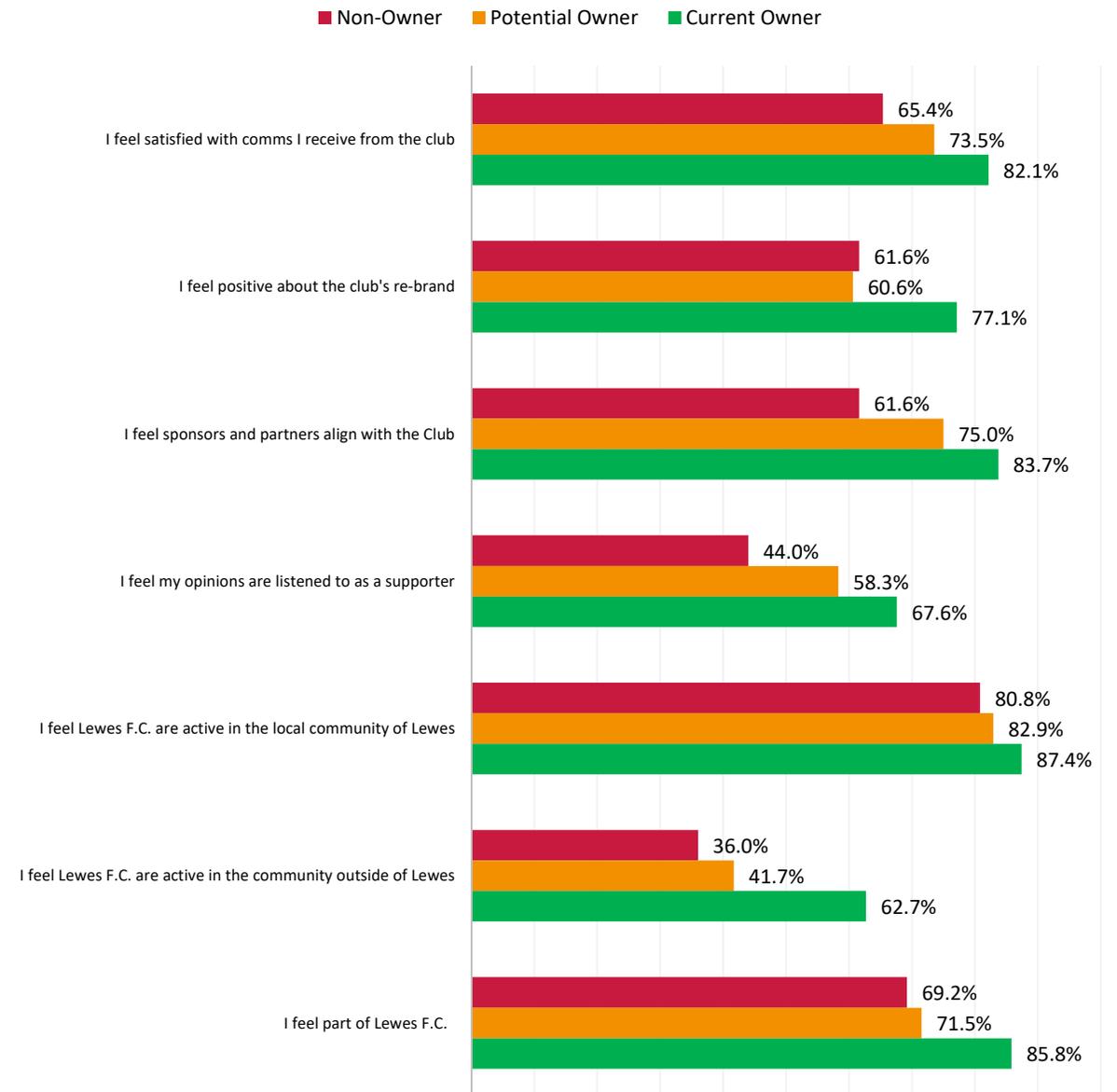


Ownership increases positive sentiment towards the club

Whilst the last slide looked at communications channels, this graphic is a collection of sentiment statements - all of which are characterised by the emotive “I feel” statement pre-fix. Each represents a deeper connection with the club for the comparative segments.

There is clearly a linear relationship in most instances showing the increasingly positive sentiment as a fandom progresses from Non-Owner, through consideration, and finally into Ownership.

An interesting point of difference in this data is the perception of the work the club does in the local vs. wider community. There is a strong and relatively balanced positive sentiment about the work the club do locally across Non-Owners, Potential Owners and Owners. However, the activity of the club further afield is much more likely to resonate and be apparent with Owners. This might be a geographically skewed insight; as Non-Owners are 100% UK based in this study compared to 94% for Potential Owners and 90% for Current Owners.



3. Own House in Order

Fan Experience Insights

Merchandise availability is the area that fans were least satisfied with

We have analysed a variety of the impacts on the matchday experience for fans:

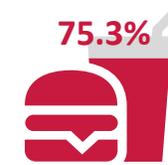
Ticketing has extremely positive sentiment, both in accessibility and price. This is particularly strong among the supporters of the men's team with 91.3% of men's team only supporters thinking the tickets are value for money.

Venue accessibility also scores strongly; entry to the Dripping Pan is seen as easy for 86.7% of fans and exiting the venue is seen as easy for 94.9% of fans (graphic shows aggregate across all supporter cohorts).

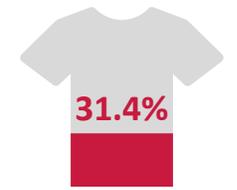
Sentiment towards the ancillary experiences at the game is more mixed. Food and beverage is broadly positive, with three quarters of fans happy about the range and quality. Satisfaction with the facilities is high for seven out of ten supporters. Merchandise stands out as an area for improvement - which we can better understand on the next page when we analyse the qualitative data.



of Lewes fans feel match **tickets** are **easy to purchase**



of Lewes fans feel there is a **good range of quality food & drink**



of Lewes fans feel there is **good merchandise** for sale



of Lewes fans feel match **tickets** are **value for money**



of Lewes fans feel **facilities** are **clean, comfortable & safe**



of Lewes fans feel there is **enjoyable live entertainment** at games



of Lewes fans feel the **Dripping Pan** is **easy to enter**



of Lewes fans feel the **Dripping Pan** is **easy to access**



of Lewes fans have **never heard discriminatory remarks** from home fans

Bringing back the club shop and revamping the scoreboard and PA system are atop the fans' Wishlist according to the qualitative data



STOP

Things that Lewes F.C. need to improve upon on matchdays.

Long queues & congestion

- "A 25 minute queue for chips needs sorting."
- "Waiting times for food and beverages....I often do not bother, as I would miss part of the match."
- "Queues for food/bar. Movement around the ground can be difficult (in front of the Rook Inn mostly)."
- "The logjam around the front of the Rook Inn and Food hatch."

BAU service approach to big games

- "If its busy the queue at the bar is too long. At the Liverpool game the bar upstairs ran out of beer and there were big queues downstairs. I know all games are not as busy at the Liverpool one though. :)"
- "Turnstile management is chaotic especially for busy games - getting more volunteers to help would resolve this..."

Abusive language

- "The men's games the fans shouting abuse, it's unpleasant. Even at the women's Liverpool game the men's team were shouting unpleasant things at the officials. It's just not in the spirit of the game - sets a bad example."
- "What can we do about supporters using foul and abusive language towards opposition/referee?"
- "No swearing from the team and coaches."



START

Things that Lewes F.C. should look to introduce/amend at matchdays.

Increase merchandise availability

- "Bring back the online shop to sell more than shirts. I know you have the vending machine for merchandise now... but it has been a non-starter"
- "Reinstate club shop. Merchandise options are extremely poor compared to other clubs."

Budget friendly food & beverage options

- "The food is quite expensive. If a family of 4 wanted food it would be very expensive... I heard quite a few people saying how surprised they were that there was no burger options."
- "Food stand and the bar is expensive and pretentious and not accommodating to *normal* tastes, echoed many a time by travelling fans I've spoken to all disappointed by the elitist attitudes."

New scoreboard

- "Repair the clock and scoreboard! Announce extra minutes added on. If you sit in the stand the board showing added time is never shown to us!"

Improve PA sound system

- "The PA system is erratic - can rarely decipher what is being said."

Improve toilets

- "Better toilets, and introduce toilets at Ham Lane end."

Other mentions

- Hard-copy programme option
- Non-alcoholic beverage options
- HoF & player information expanded
- Walk-out anthem & kids as mascots
- Introduce more (and promote) pre-game speakers



CONTINUE

Things that Lewes F.C. does really well at matchdays and should continue.

Staff/volunteer service

- "Excellent volunteers on turnstiles."
- "Welcoming staff/volunteers. Ethel! Barbara! Gary! Legends"
- "Marshalls are friendly and always go out of their way to support my disabled father to his seat. Great family atmosphere."

Atmosphere/Family-friendliness

- "Make all fans welcome, great atmosphere and have made many friends."
- "Caters for all ages and always a fun atmosphere."
- "Creates a family friendly vibe."

Ease of entry/exit

- "The layout is very good, entering as a season ticket holder is easy. Transport links are very good."
- "Very accessible, mobile tickets make it quick and easy to enter the ground."

High-end & local beer options

- "Excellent and varied beer and ale selection."
- "Great selection of local beers."

Golden Goal competition

- "Raffle and Golden Goal really add to the experience."
- "Ethel is a legend and whilst I have only won once (in ten years) I will keep playing."

Bands (Particularly brass band)

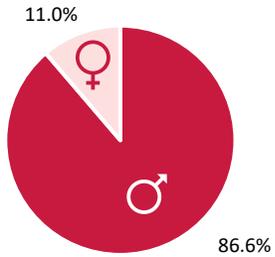
- "Drumming is great and on the occasion the brass section come to the Dripping Pan it was awesome!"

4. Impact on Fans & Community

Engaged Audience Insights

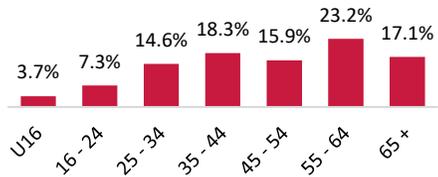
Both the equal playing budget and ownership model has strong support by supporters of both the men and women's team

Support Men's Team Only

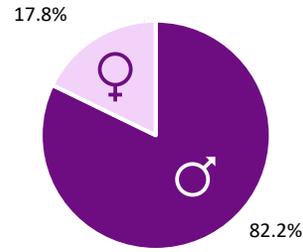


47.0

Average age

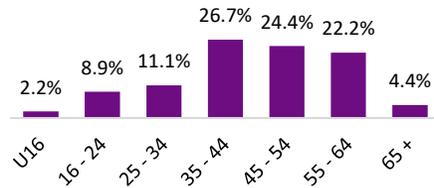


Support Both Teams



44.3

Average age

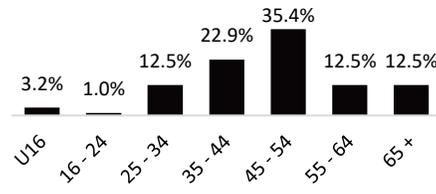


Support Women's Team Only

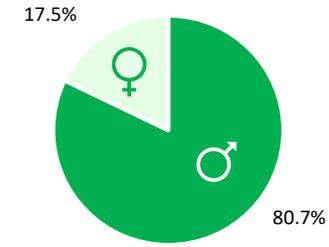


46.9

Average age

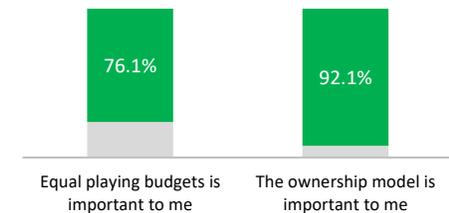
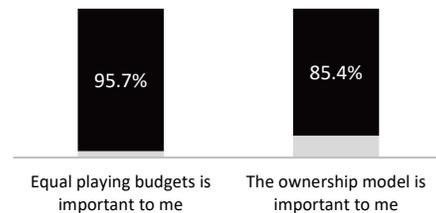
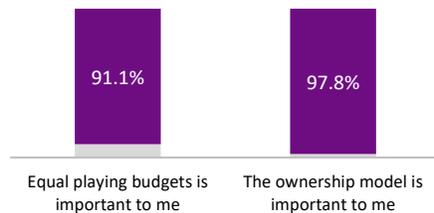
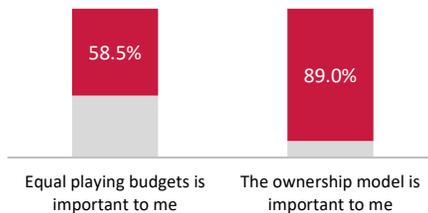
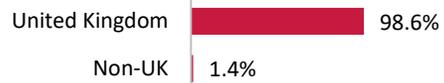
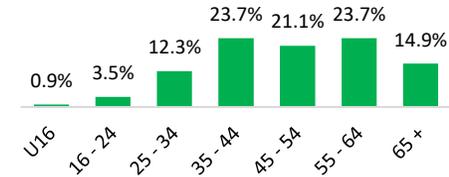


Owners



48.6

Average age



5. Impact on the World

Social Impact Insights

**63% of Lewes Fans think
about the impact of
football on society
because of Lewes F.C.**



**73% of the Lewes F.C.
men's team supporters
state they think about
gender equality more
now than they did five
years ago**



60% of Lewes Fans have undertaken a purpose-driven action inspired by Lewes F.C. campaigns



How we will act on your feedback

What we are doing

Matchday fans will already have seen great improvements in some areas highlighted in the report:

- Reduced congestion on matchday with a new 360 path all the way around the pitch.
- Reduced queues to purchase drinks and food
- Increased number of matchday volunteers
- Increased array of non-alcoholic drinks
- Improved social media and website content
- Identified partial funding for a new toilet block



What we will be doing

- Tweaking our club strategy to take into consideration the views raised by fans.
- Launching a new online shop with wider range of merchandise
- Seeking a sponsor or partner for a new scoreboard and in-ground speakers
- Identify additional funding/sponsors to realise the new toilet block
- Consider additional food options in ground



Thank you to Honoco for analysing the fan survey data and producing this insight report for us

Honoco have been assisting Xero with their global women's football strategy and as part of this journey recommended partnership with Lewes Football Club.

Founded in New Zealand, Honoco have taken inspiration from te reo Māori - the indigenous language of New Zealand - which means to join, connect or link. Honoco are insights-driven partnership specialists who substantiate, evaluate and enable effective partnerships. Honoco provide research and strategic consulting services to brands and rights holders across the world to strengthen collaboration.

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