



THST

THST Fans Survey 2015

Friday 31st July 2015

Contents

Intro p3

Demographics p4 – p6

Ticketing p7 – p12

Ticketing – New stadium p13 – p14

Atmosphere p14 – p18

Stewarding & Policing p19

ENIC p20 – p23

On field p24 – p25

**Governance & National
Supporters Campaigns** p26

THST p27 – p30

Conclusion p31 – p32

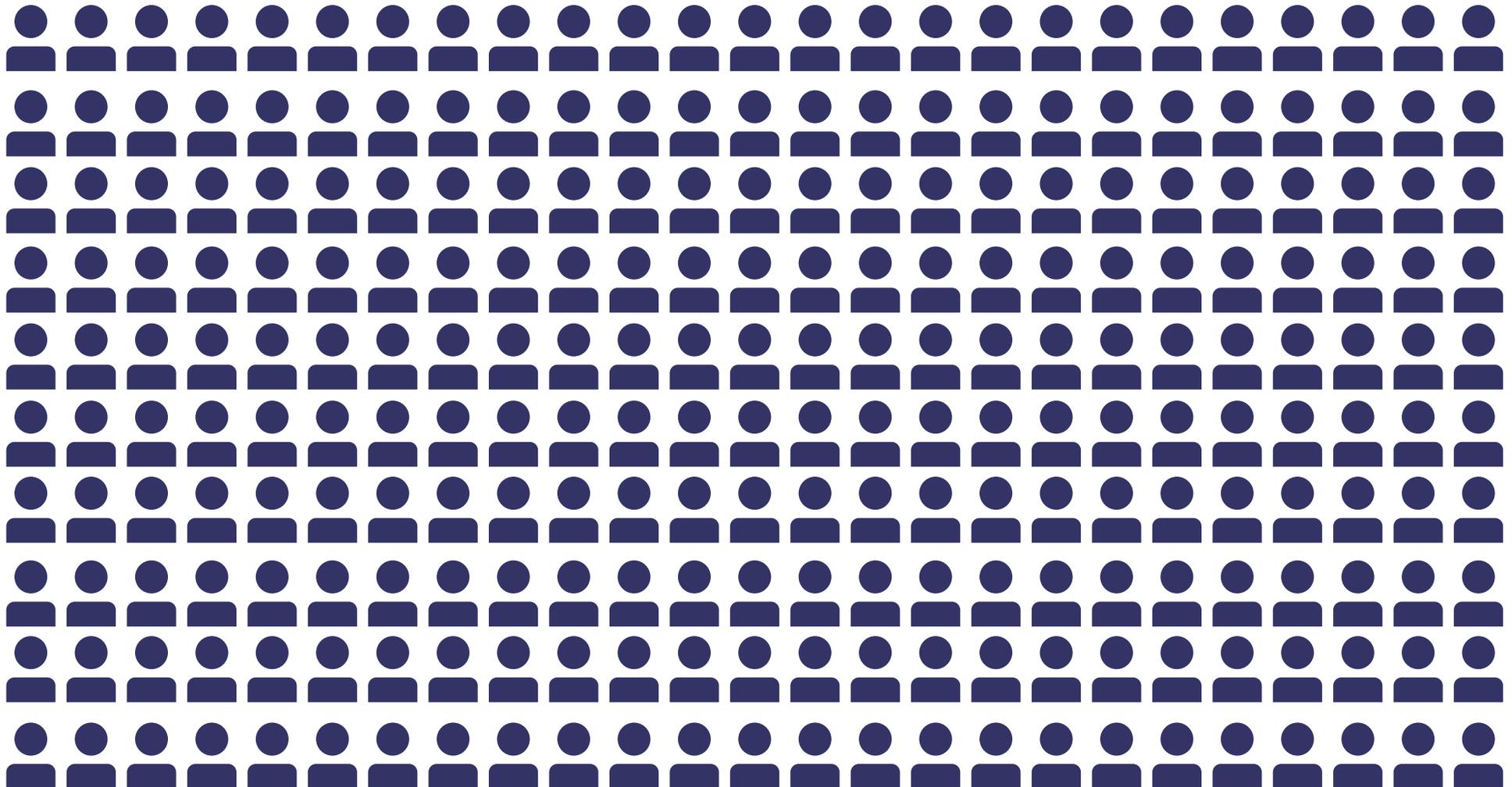
Intro

In June and July THST ran a survey to find out the opinions of Spurs fans on a number of issues, from ticket pricing to ENIC's stewardship of the Club.

The results will help inform the Trust's work over the next season and ensure we are campaigning on the issues most important to Tottenham supporters.

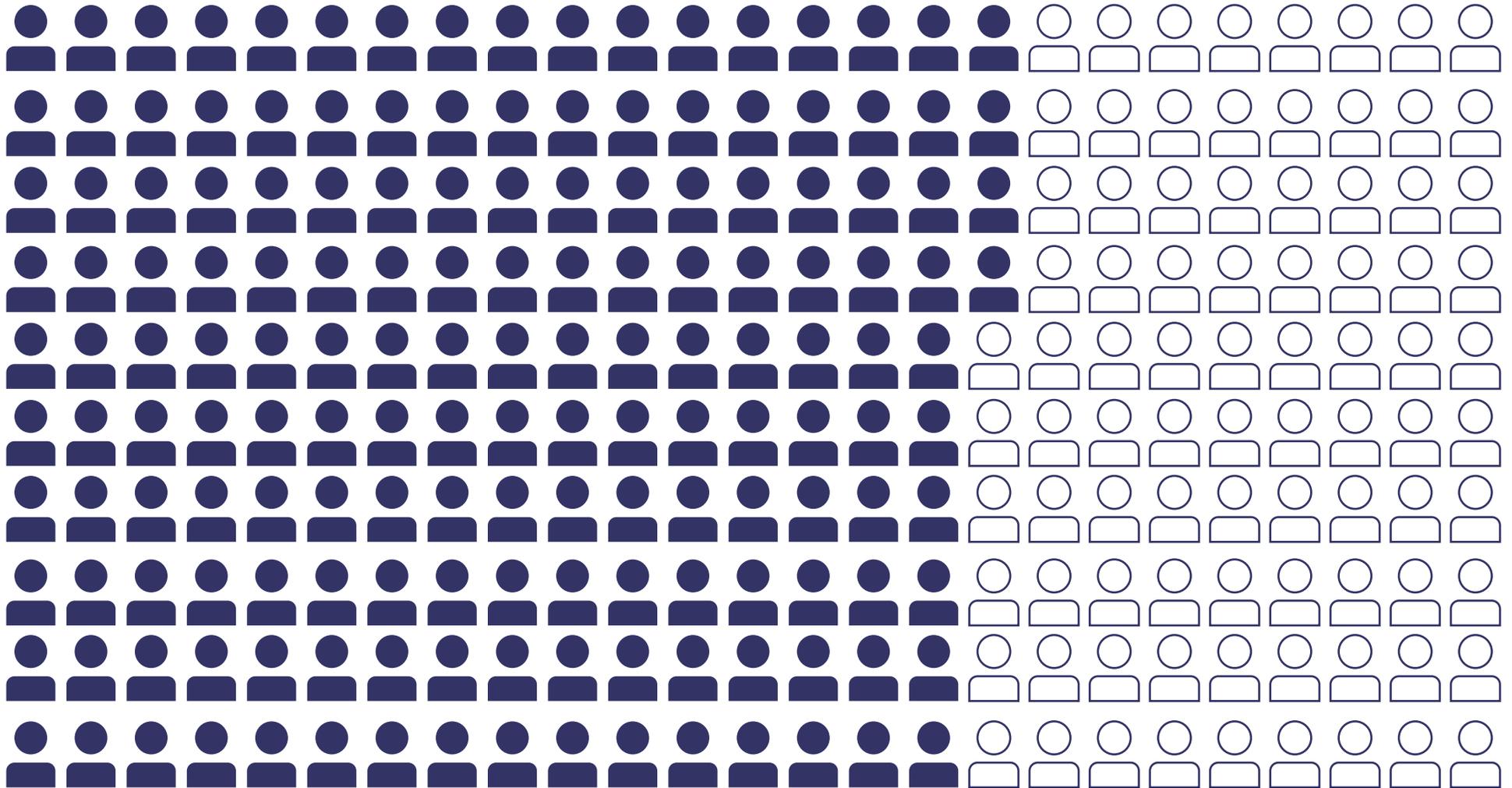
Demographics

Over 1000 fans completed the survey.



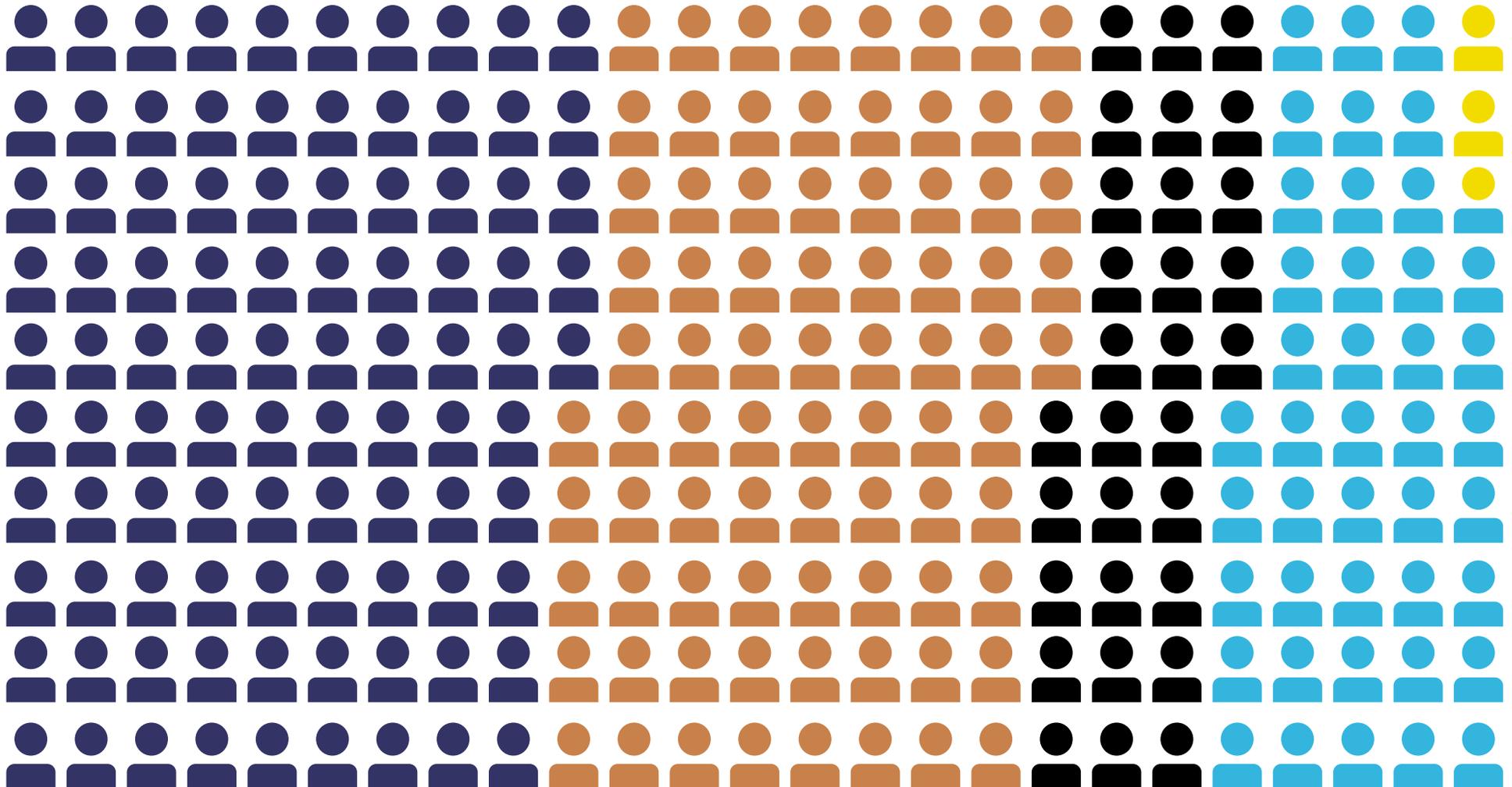
Demographics

66% were members of THST.



Demographics

38% were Season Ticket Holders, 32% were Bronze members, 12% Lilywhite, 17% non-members and 1% Junior.



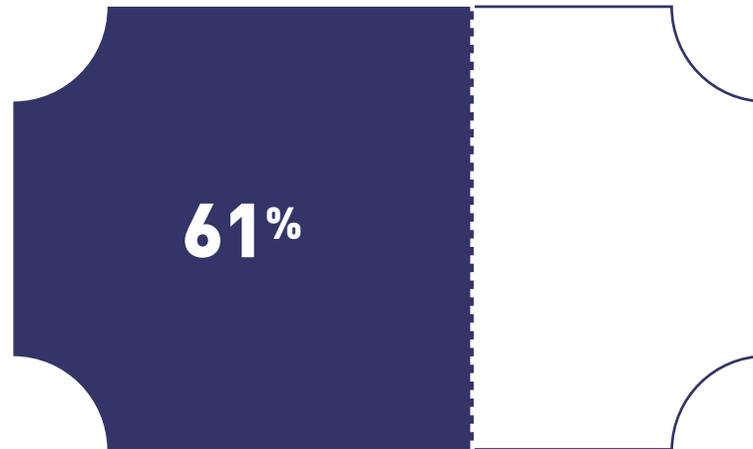
Ticketing

Ticket pricing continues to be the biggest issue for supporters and a major cause of dissatisfaction.

For the second season in a row, it was ranked by respondents as the number one campaigning priority for the Trust.

Ticketing

Cheaper ticket prices were also named as the main factor in encouraging attendance, with **61%** saying it would make them go to more games.



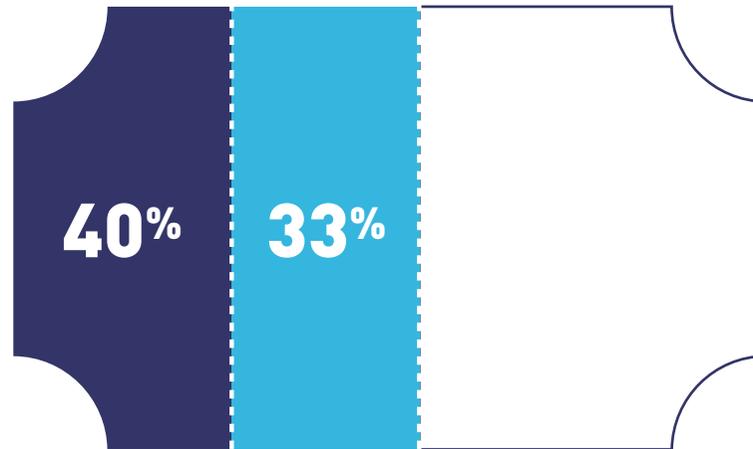
Ticketing

There was significant opposition to the proposed **2%** ticket price increase for the 2016/17 season with **73%** saying this was unacceptable.



Ticketing

40% of these believed prices should be reduced and **33%** that they should be frozen.



Ticketing



54% were either highly dissatisfied or dissatisfied with ticket pricing for home league games.



49% were either highly dissatisfied or dissatisfied with ticket pricing for away league games.



44% were highly dissatisfied or dissatisfied with categorised pricing for league games.



68% were highly dissatisfied or dissatisfied with administration fees on tickets.



45% were highly dissatisfied or dissatisfied with season ticket pricing.

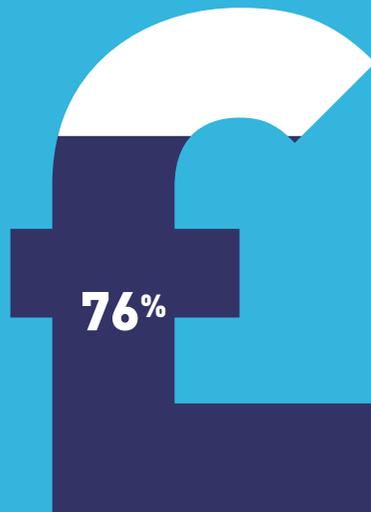
Ticketing

The pricing for domestic and European cup games, which is significantly lower than league games, continues to prove popular with supporters. **52%** were satisfied or highly satisfied with the pricing for European games and **51%** for domestic cup matches.

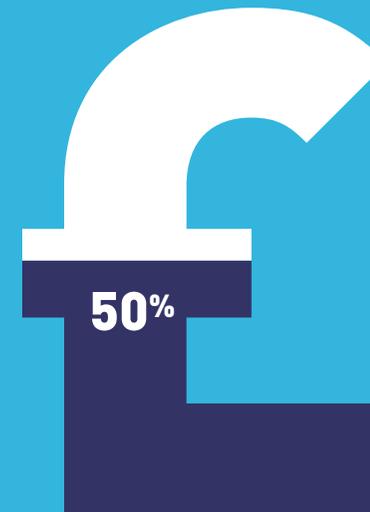
There was continued opposition to the Club's proposed plans to bring forward the date of Season Ticket renewals. **59%** were dissatisfied or highly dissatisfied with the suggestion. Only **7%** would be satisfied or highly satisfied with a date change.

Ticketing – New stadium

Regarding the new stadium, price was identified as the key factor in influencing fans' decisions on whether or not they will renew or purchase a Season Ticket in the new stadium.



With 76% of respondents saying price would influence their decision.



Being able to purchase tickets and sit with friends came out as the second most important factor, with 50% saying this would impact on their decision.

Ticketing – New stadium

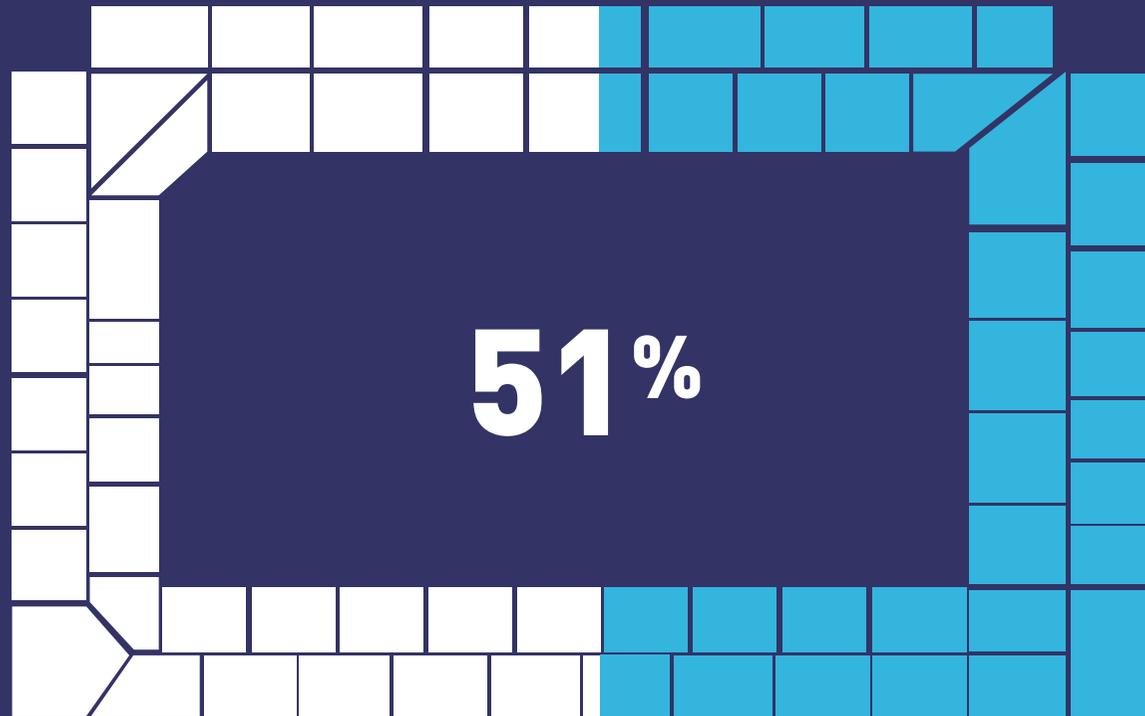
In relation to the ticketing policy in the new stadium, a big majority want the increased capacity to be used to reduce some or all ticket prices. **45%** believed the greater capacity should be used to bring down the cost of all tickets and **32%** that it should be used to bring down the cost of some tickets.

There was support for a policy of “stretch-pricing” where corporate and top-priced tickets are set high and prices at the lower end of the scale are reduced for regular fans. **79%** were in favour of this type of ticketing policy. However, only **43%** would accept a higher proportion of corporate and top priced tickets in the new stadium.

“Safe standing, cheaper prices and more availability for the average fan”

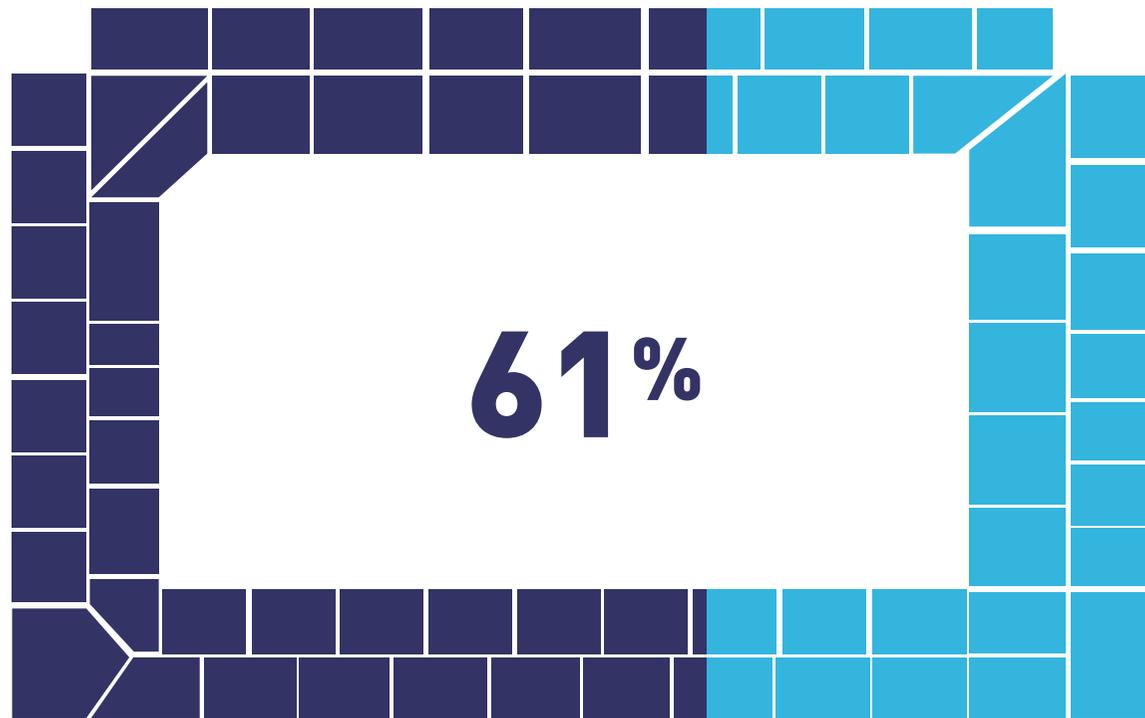
Atmosphere

Atmosphere at White Hart Lane remains an area of concern for Spurs fans. **51%** are highly dissatisfied or dissatisfied with the atmosphere at home games.



Atmosphere

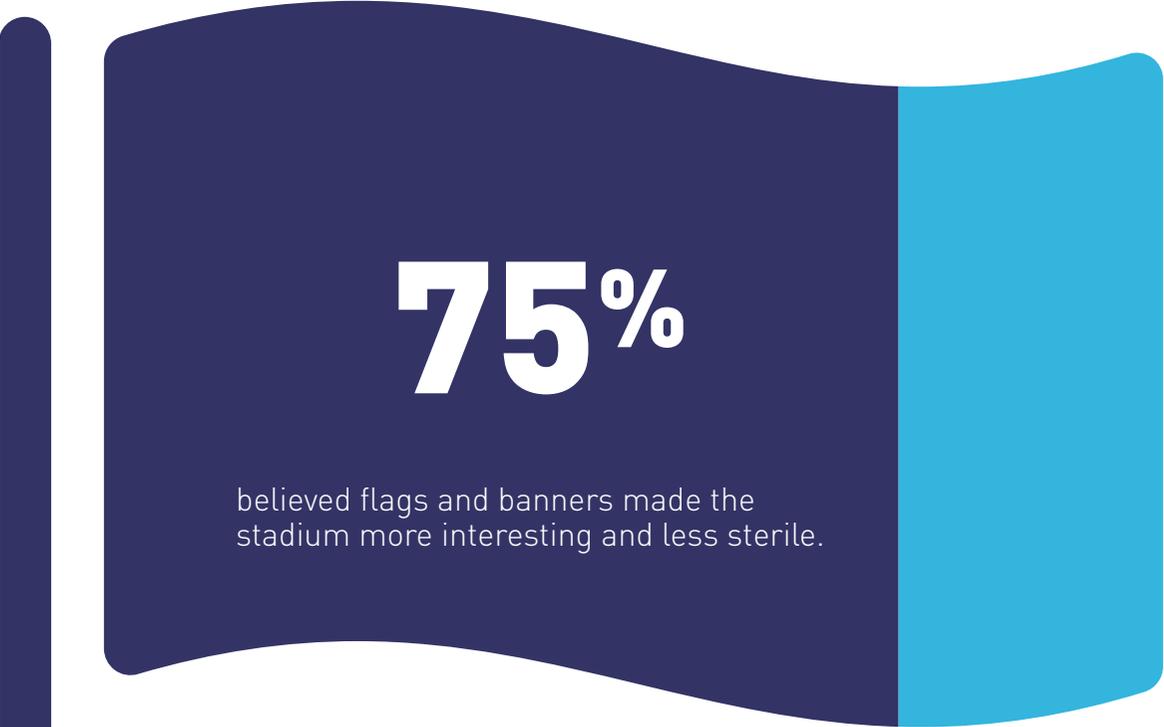
Although this is an improvement on last year where the figure was **61%**.



Atmosphere

There was large support for more visuals, such as flags and banners, at the Lane. **59%** felt they could help lift the crowd and **75%** believed they made the stadium more interesting and less sterile.

“Actively encourage fans to bring flags and banners”



75%

believed flags and banners made the stadium more interesting and less sterile.

Atmosphere

Safe standing was identified as a factor that could improve the atmosphere by many respondents. **69%** would like to see a safe standing area in the new ground and **46%** said they would consider buying a Season Ticket in such an area. Only **9%** opposed a purpose built safe standing area.

“Make it easier for vocal supporters to gather in one place”



Stewarding & Policing

There was a good level of satisfaction with both stewarding and policing at White Hart Lane. **62%** were satisfied or highly satisfied with stewarding and **58%** were satisfied or highly satisfied with policing. This is a slight increase on last year's results.

ENIC

75% think ENIC's stewardship of the Club has improved or stayed the same over the last 5 years. There is overall praise for the way the Club is run financially, but some hard truths around previous policy and footballing decisions.

“We will shortly have a world class stadium to go alongside a world class training ground.”

“Sacking of managers. Director of Football. Transfer windows of constant profit when we have high ticket prices. Time taken for stadium. Lack of care of supporter opinion and Milton Keynes”



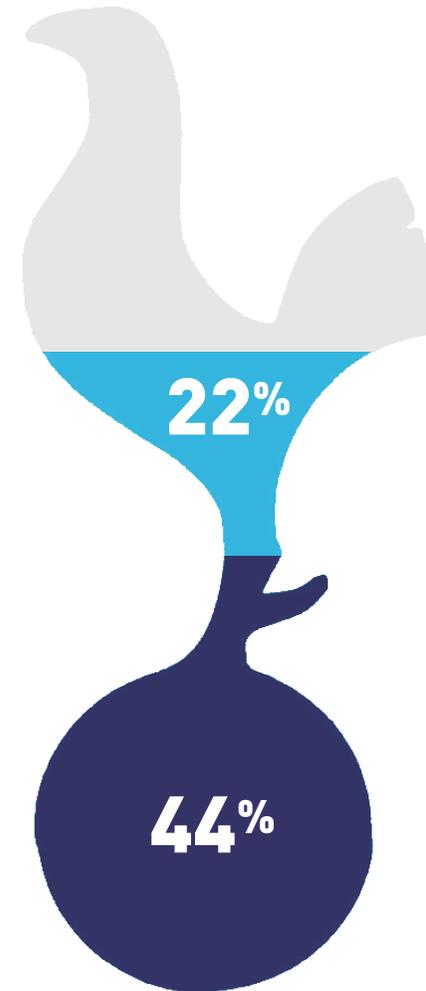
ENIC

44% are confident or highly confident in ENIC's long term strategy for the Club, 22% unconfident or highly unconfident.

“I think they're genuinely operating with the club / supporters in mind but they have made some bad choices too”

“The continuing rise in ticket prices cannot be excused given the amount of TV revenue, player salaries and an increase in Daniel Levy's salary”

“Would like them to be more forward thinking on ticket pricing and fan interaction”



ENIC

49% are dissatisfied or highly dissatisfied with the Club's engagement and communication, however, **31%** believe it has improved over the past 5 years. This is a significant uplift from last year, when only **9%** perceived communications with fans to have improved.

While this is progress, it's something THST will continue to encourage THFC to develop further as there is clearly work still to be done.

“Stop treating us like client reference numbers. We are not cash cows”

“More open communication and dialogue with fans about policies affecting fans”

“More communication from the board on key issues rather than selected PR soundbites”

“More openness with supporters groups and greater level of supporter representation within the Club”

ENIC

78% felt an annual meeting in which THFC reported back to its fans, much as a public company reports back to its shareholders, would be useful. This could be a good way for the Club to improve its communication with its fans.

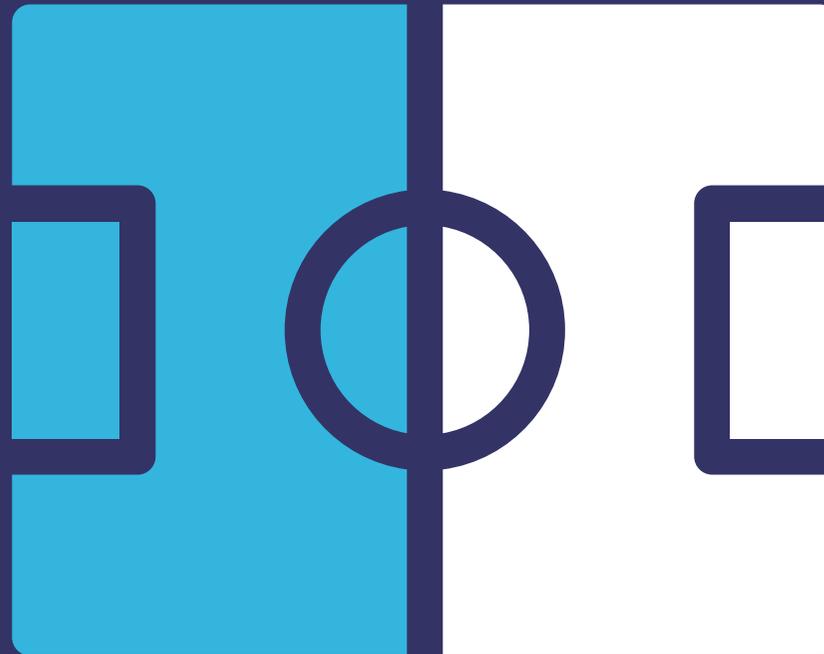
Awareness of the Club's Supporter Liaison Office (SLO) and their role remains low. Whilst this is an improvement on the 71% figure last year, **62%** remain unaware of them or their role. Again, a higher profile for the SLO could help the Club improve communication with fans.

Satisfaction in the Club's transfer policy is low. **54%** are dissatisfied or highly dissatisfied. There is, however, much more satisfaction with the Club's youth policy, **92%** saying they were satisfied or highly satisfied.

**“Clear statement
of strategy and
means of achieving
it from ENIC”**

On Field

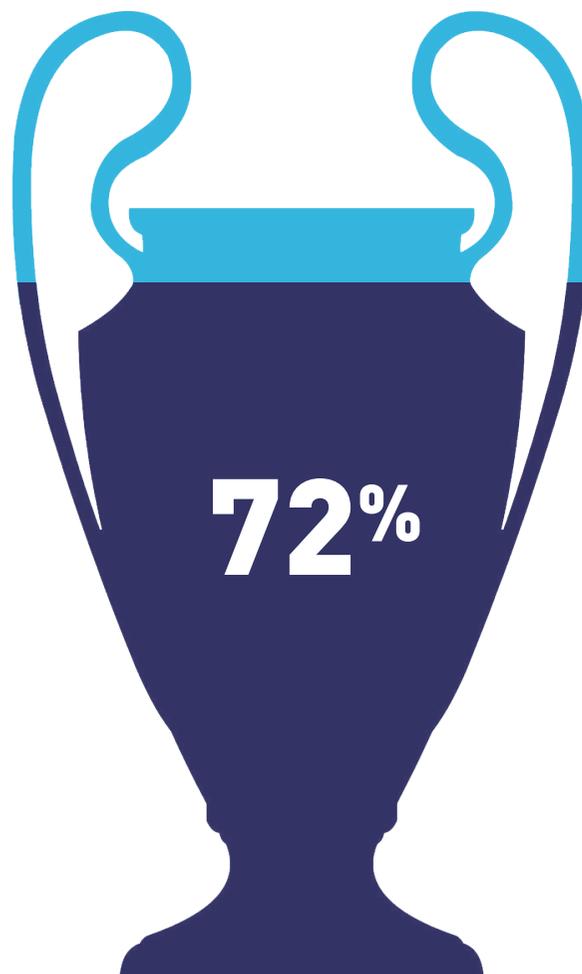
Half those surveyed, were satisfied or highly satisfied with the team's on field performance last season.



50%
Satisfied

On Field

72% of respondents said that THFC's top priority for next season should be Champions League qualification.



Governance & National Supporters Campaigns

There was strong support for reform in football governance, including political action. **62%** think legislation is needed to reform the way football is run. **79%** back calls for legislation to require Club Boards to include independent supporter representatives as members.

The Football Supporters' Federation (FSF) received a large backing for their Twenty's Plenty campaign, which calls for a £20 cap on all away tickets, with **82%** saying they supported it.

Another of the FSF's campaigns, Share TV Wealth, which calls on the Premier League to use money from the 2016-2019 TV deal to reduce ticket prices and put more money into grass roots football, received the backing of **91%** of respondents.

THST

We also asked for feedback on THST to understand how supporters feel we have performed over the last year and what our priorities should be for the next season. Respondents ordered campaigning priorities for the Trust over the next season as follows:

1. **Ticket pricing**
2. **Stadium**
3. **Ground share**
4. **Fan/Club relationship**
5. **Atmosphere**
6. **Safe standing**
7. **StubHub**
8. **National Campaigning on supporters' rights**
9. **Policing/Stewarding**
10. **Community initiatives**
11. **National Campaigning on governance issues**

THST

80% of respondents were either satisfied or highly satisfied with the work of the Trust this season.



80%

THST

82% felt THST had been either very successful or fairly successful on the issues it has campaigned for in the past year.



82%

THST

In terms of the Trust's approach to working with Club, **63%** felt it was about right, **17%** thought it was too soft and **2%** thought it was too combative.

Conclusion

High ticket prices remain the top issue for fans and there is a clear message to the Club that supporters are opposed to further increases and want to see the greater capacity of the new stadium used to make football more affordable. We would call on the Club to take note of the findings relating to pricing and ensure supporters concerns are taken on board.

Atmosphere at White Hart Lane is also a continuing worry and we call on the Club to work with the Trust and other fan groups to take action to address this both at the current stadium and the new one. Safe standing and lower prices have both been highlighted as ways of helping to improve the atmosphere. We would ask the Club to help lobby the government and the Premier League on safe standing and to keep in mind the effect of high ticket prices on atmosphere.

While ENIC can take encouragement from our findings relating to fans opinions on their stewardship of the Club and confidence in their long term strategy, they should not rest on their laurels. They should also take note of the continuing disappointment amongst supporters with the way they communicate and engage with fans and should look at the high levels of support for the suggestion of an annual meeting to report back to fans. The low profile of the Supporter Liaison Officer is another area where the Club needs to take action. The role of an SLO is to build bridges between the club and its fans. This cannot be achieved if nobody knows who or what the SLO is.

The high support for reform of football should be noted by politicians and those governing the game. If football won't reform itself, fans are clearly supportive of the government stepping in.

Conclusion

The support for the Football Supporters Federation's campaigns is a clear indication of the demand for the Premier League and its member clubs to remember who this game is for and to act accordingly to make football more affordable for the fans.