

FAN SURVEY

07 AUGUST 2017



CONTENTS

INTRODUCTION	03
MATCH ATTENDANCE AND TICKETING	04
SEASON AT WEMBLEY	07
NEW STADIUM	09
ATMOSPHERE	12
ON FIELD	14
THFC COMMUNICATIONS	15
WIDER FOOTBALL ISSUES	16
THST	17
CONCLUSION	18

INTRODUCTION

Our annual survey is now in its **fourth year**. It's the biggest piece of research we do, and is a major influence on how we prioritise work and how we inform the positions we take on behalf of supporters.

This year saw more fans than ever give us their views, with **3,208 taking the survey**.

The vast majority, **83%**, were aged between **19 and 55**, with the **26-35-year-old age group** forming the largest proportion – **28%**.

Respondents were overwhelmingly male, **92%**, and over **70%** had attended **five or more** home games during the 2016-17 season.



MATCH ATTENDANCE AND TICKETING

Last season was a unique season. It was to be the last at White Hart Lane, there was a reduced capacity due to building work, we played our European games at Wembley and, for the first time, away tickets were capped at £30 as a result of fan campaigning. So our questions around attendance and ticketing were more detailed.

We asked how happy people were with ticket pricing for home games at White Hart Lane, and **39%** said they were happy, with **26%** saying they were not. The £30 away cap left **45%** satisfied, with just **8%** dissatisfied. Satisfaction levels with the policy of accessible pricing for cup matches, something THST has consistently pushed for, continue to be high with **72%** approving of home cup ticket prices. The Champions League packages gained a huge **84%** approval rating.

With demand for tickets high and supply restricted, the Club took the decision to introduce a ballot system for home tickets. This decision generated enormous discussion and appeared to be controversial. However, just **24%** said they were dissatisfied with the system, with the majority – **55%** – ambivalent.

While the ballot was not something the Trust pushed for, we did push hard for Category A games to be allocated by loyalty points. This decision was backed by **41%** of those answering the survey, with only **14%** disagreeing. This gives us confidence that we are able to respond quickly and accurately on important issues when necessary, and backed the anecdotal evidence we picked up during the season.



MATCH ATTENDANCE AND TICKETING

Last season's circumstances did have an influence on match attendance, with **26%** saying they attended fewer home games than throughout the 2015-16 season, with **54%** of that group citing ticket availability as the reason.

It was no surprise that, with ticket numbers limited to c3,000 for each away league game, only **21%** of respondents had attended five or more Premier League away matches last season, with **22%** of those claiming they had attended fewer away games than in 2015-16, and **65%** citing ticket availability as a reason for this drop.

The much-debated system of awarding away tickets by loyalty points was backed by **45%**, with a further **19%** expressing no clear view, and **33%** expressing dissatisfaction with the system.

Much has been made of the £30 away price cap driving up demand, so we asked whether that had been an influencing factor on the decision to apply for away tickets. Some **53%** said it had made no difference to the number of away games they applied for, with **36%** saying it had been a factor.

Drilling down further into the factors influencing a decision to apply for away games, time and day of kick off, location and cost of travel came out top, with time and day of kick off being judged the most important factor when asked to choose just one. Ticket pricing came ninth on the list.

TIME & DAY OF KO



LOCATION



COST OF TRAVEL



TICKET PRICE



MATCH ATTENDANCE AND TICKETING

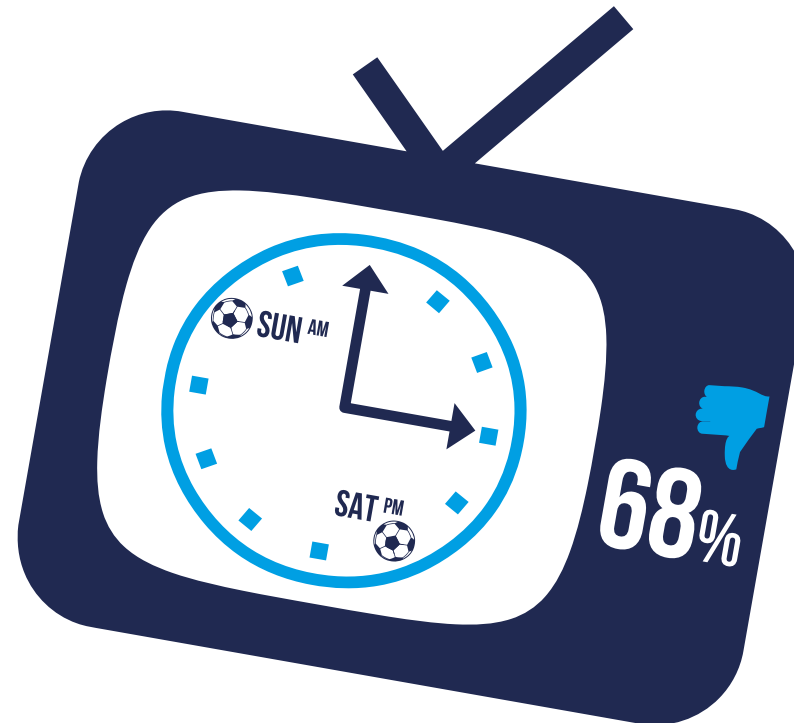
The highest level of dissatisfaction on ticketing was expressed with the booking fees levied on ticket purchases – with **54%** expressing unhappiness.

The survey found that most fans travel to away games by either car or train, with **79%** aware that Spurs had organised subsidised travel over the past four seasons, and **23%** having travelled on either club trains, coaches or aeroplanes. Some **80%** of respondents would like this to continue throughout the 2017-18 season.

We also asked about the impact of fixtures being moved for TV. Some **64%** said they had been inconvenienced by matches being moved for TV throughout the past season, with **88%** agreeing that far more consideration should be given to match-going fans when scheduling matches for broadcast.

Aligning on sale dates with broadcast pick announcements was viewed as beneficial by **72%**. If rail operators offered flexible train tickets that can be used whenever a match was played, an idea floated at the last general election, that would encourage **42%** of our survey to travel to more away games by train.

And **68%** of our survey were against the introduction of additional broadcast slots on Saturday evenings and Sunday mornings, with only **13%** in agreement.



SEASON AT WEMBLEY

Our survey ran while the sales process for Wembley Season Tickets was still running, although the survey window was late in the process.

Of those who held a Season Ticket last season, **38%** were happy with the pricing of their Season Ticket for the year at Wembley, with **41%** dissatisfied.

Some **60%** of existing Season Ticket holders disagreed with the decision to remove the two cup vouchers from the Season Ticket pack. However, **90%** wanted THFC to offer a group stage Champions League pack again this season. It's worth observing that this is an example of the Club needing to articulate decisions better. One of the main reasons for detaching the cup vouchers from the Season Ticket package was to allow for more creativity with cup pricing and sales methods – including a group stage pack for Champions League games.

Some **98%** of Season Ticket holders surveyed had renewed their tickets at Wembley.

And **69%** of existing Season Ticket holders felt there should have been an amnesty for ST holders for the season at Wembley, with **41%** of those saying they would have taken the option if available.

Looking at Bronze members last season, the vast majority of who would be eligible for a Season Ticket next year, **28%** were unhappy with the pricing of Season Tickets, with **48%** disagreeing with the decision to remove the cup vouchers from the Season Ticket package.



SEASON AT WEMBLEY

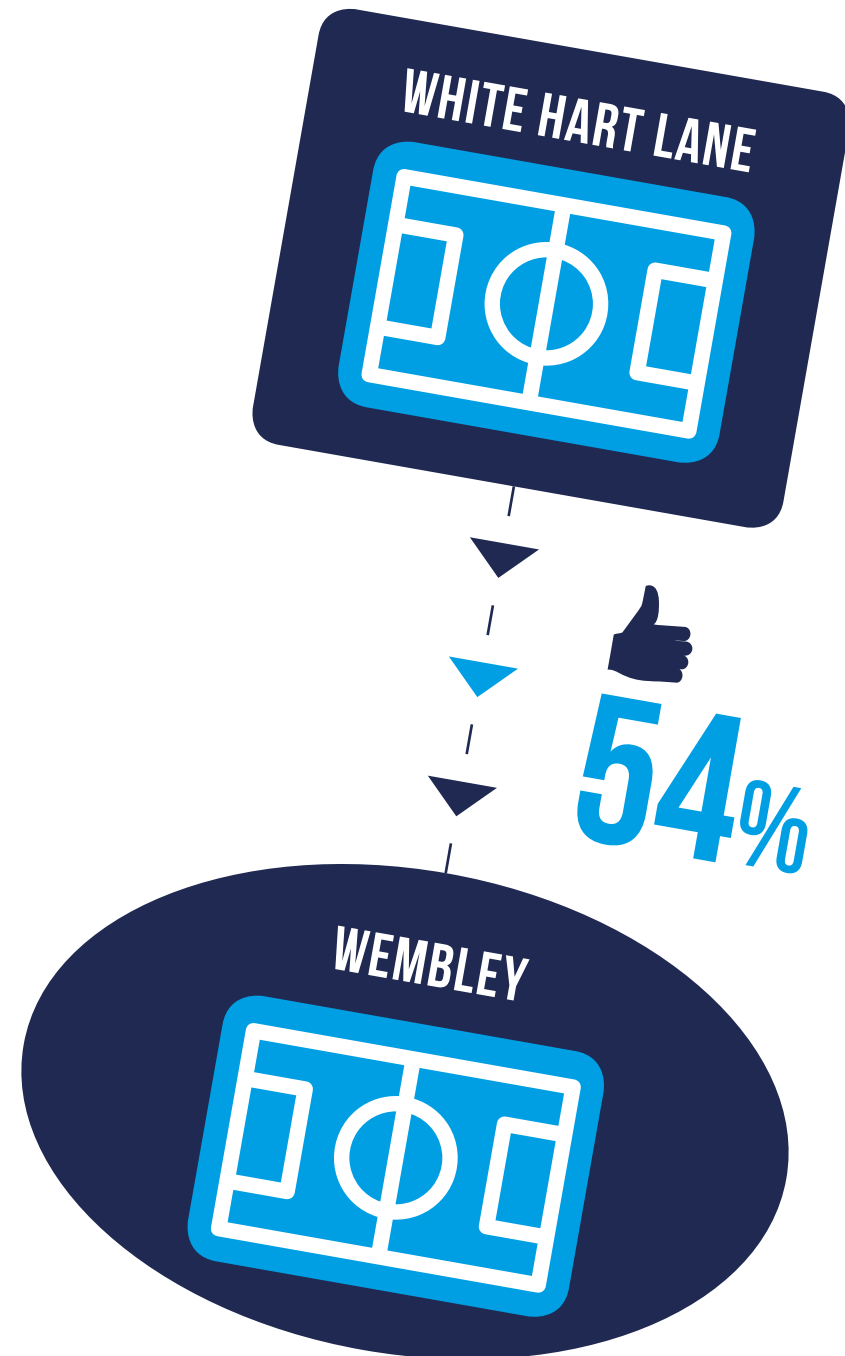
At the time of issuing the survey, **45%** of Bronze members who thought they'd be offered a Season Ticket were considering accepting that offer, with time commitment, cost and difficulties travelling to Wembley the main factors that would influence them not to.

Of those who were Bronze members last season, **63%** felt there should have been an amnesty for those on the waiting list not wishing to take up a Season Ticket next season.

Of existing Season Ticket holders, **54%** are satisfied with the way the Club has migrated fans into Wembley, against an overall figure of **42%**.

The vast majority of fans intended to travel to Wembley by tube or train, but the **37%** intending on travelling by car may have problems with the lack of car parking and road closures on match days. Wembley is a public transport destination!

Meanwhile, **49%** of fans will pay more for their travel to Wembley than they do to White Hart Lane, with **20%** saying they would be paying "a significant amount more".



NEW STADIUM

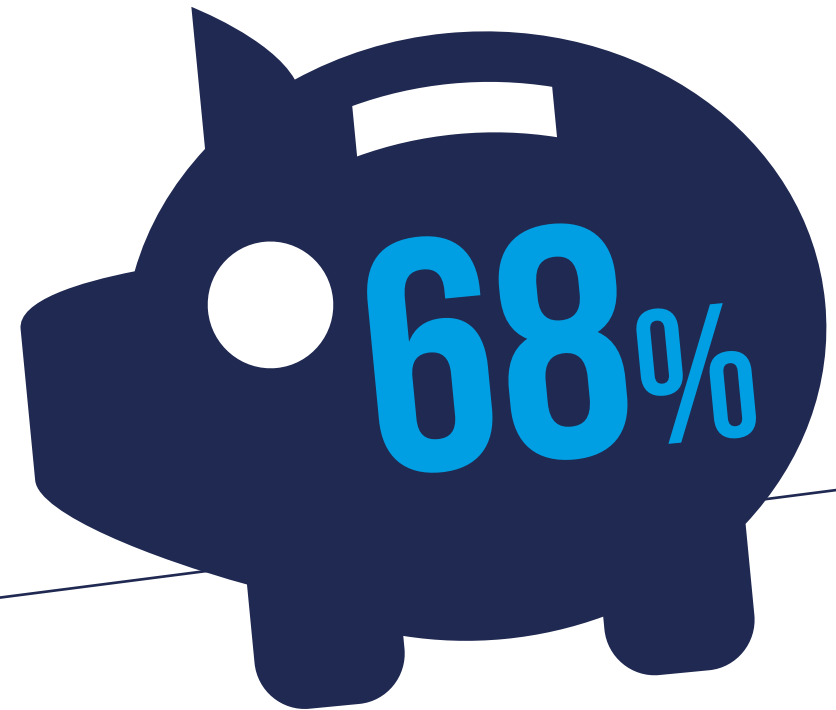
Details of ticketing at the new stadium are yet, we are told, to be decided, and we are seeking talks with the Club about this. We asked some questions to inform our approach.

Some **97%** of Season Ticket holders intend to continue with their Season Ticket in the new stadium.

When considering purchasing or renewing a Season Ticket in the new ground, price is the most important factor, coming in at **68%** overall.

On pricing policy, **49%** felt the purpose should be to use the greater capacity to bring down the cost of all tickets, with just **7%** believing it should be to increase revenue.

The majority of Season Ticket holders are willing to consider multi year deals in the new ground, but only if a significant incentive is offered. Some **31%** wanted to be able to pay for one year at a time with the price frozen for the duration of the deal, and be able to pay in interest-free instalments. And **30%** said they would consider making a multi-year commitment up front in return for a discount. Just **12%** said they would not commit to more than one season at a time.



NEW STADIUM

When asked how priority for choosing seats at the new stadium should be decided among Season Ticket holders, longevity of holding a Season Ticket was deemed to carry the most weight, then positioning of seat at White Hart Lane, loyalty points and membership strand.

Some **60%** of Season Ticket holders expressed a preference for sitting in the single tier South stand, compared to **68%** of the overall figure.

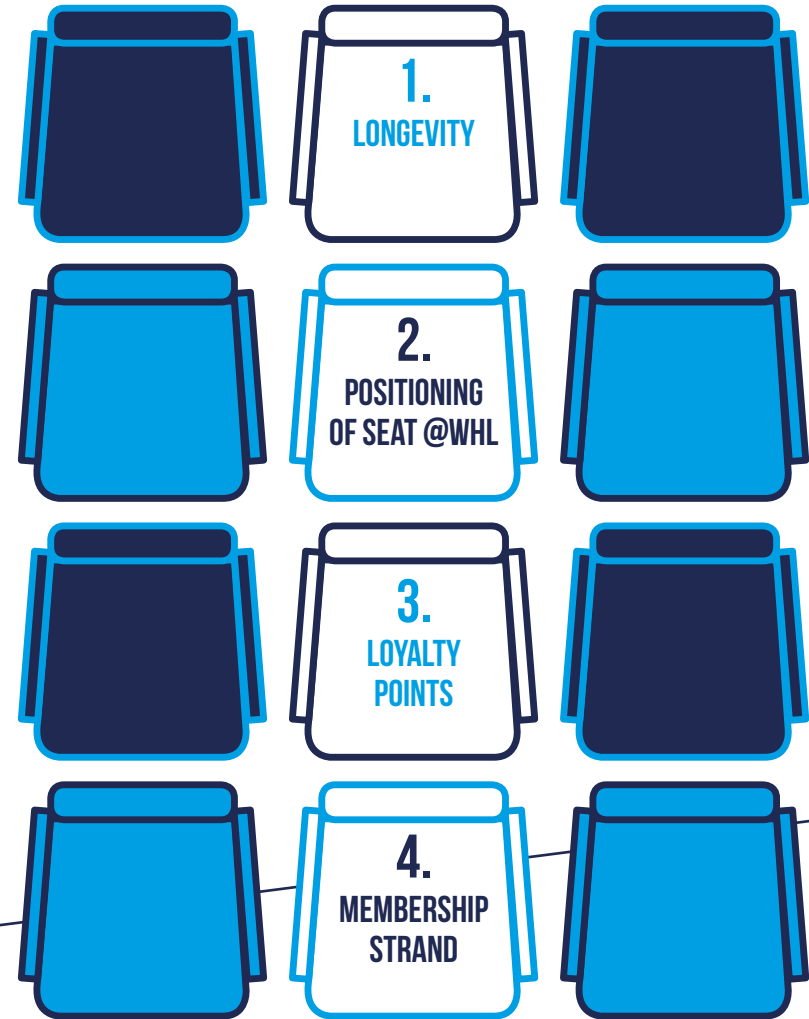
In terms of who fans wanted to sit with in the new stadium, those who they're sitting with at Wembley and a combination of those and other friends came out top. Some **7%** wanted to sit with a totally new group of fans, with some specifically asking not to be seated in front of the people they are now!

We get quite a few people contacting us about catering at the match, so we asked some questions that should help inform the Club's approach at the new stadium.

Some **44%** intended on eating and drinking inside the new stadium before games, with **54%** intending to visit a local pub and **35%** a local restaurant.

We asked what would influence a decision to eat and drink inside the stadium, and 'a wider range of food choice' and 'lower pricing for similar quality food' topped the reasons given, followed by speedier service and the ability to socialise with friends regardless of which stand they were sitting in.

PRIORITY FOR CHOOSING SEATS AT THE NEW STADIUM



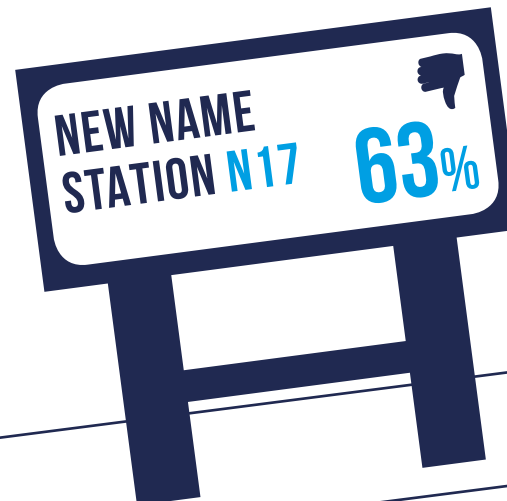
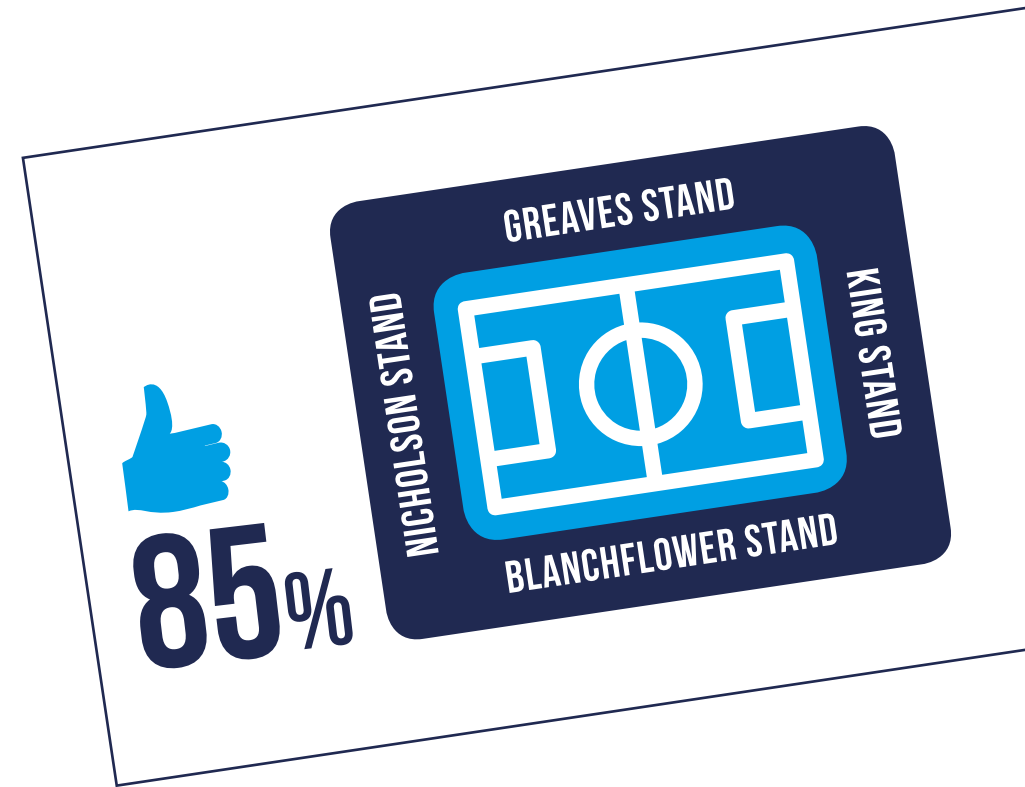
NEW STADIUM

In terms of food options in the new stadium, we may live in ultra health conscious 2017, but burgers, hot dogs and chips topped the poll.

Local produce also polled well with **35%** saying they would like to see it on sale. Draft lagers and beers topped the drinks wish list.

We also asked a few basic questions about heritage in the new stadium. Perhaps unsurprisingly, **85%** thought retaining tradition and heritage in a modern ground was important, with **63%** wanting to see the stands named after players and managers. Bill Nicholson, Jimmy Greaves, Danny Blanchflower and Ledley King topped the polls for names for stands.

And with frequent rumours circulating about a possible change of name for White Hart Lane station, we asked for supporters' views. Some **63%** told us they disagreed with any plan to rename the station, with only **12%** in favour.



ATMOSPHERE

As to be expected after an unbeaten campaign at home, **92%** of respondents were satisfied with the atmosphere at White Hart Lane last season. Some **71%** were happy with the policing at White Hart Lane last season, with **62%** satisfied with the policing at Wembley. And **74%** of ST holders were satisfied with the atmosphere at away matches last season, with **58%** satisfied with the stewarding at away matches and **63%** happy with stewarding at Wembley.

However, **44%** expressed dissatisfaction with the atmosphere at Wembley, so that's an area that needs attention. There have, over the last few years, been many opinions expressed about flags, banners and other visual elements of support, but **61%** of respondents still see them as helping to lift the crowd.

 **92%**

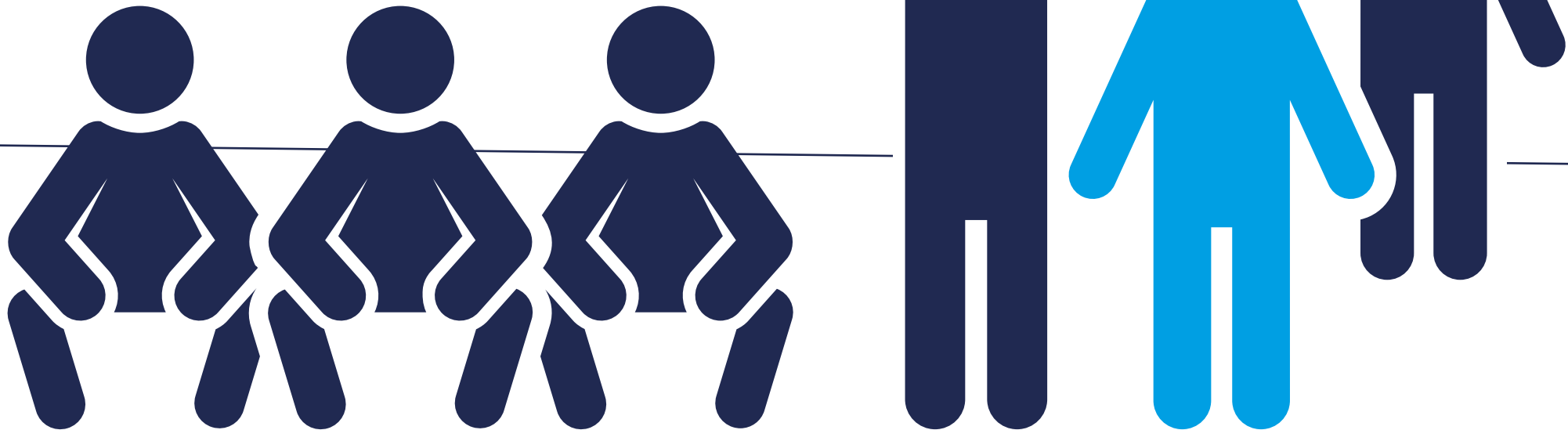


ATMOSPHERE

We also delved a little deeper into the issues around safe standing. Support for the introduction of a safe standing area if the law changes still runs high, with **86%** in favour and only **7%** against.

We asked if the introduction of a safe standing area meant sitting down was more strictly enforced in other areas of the ground, would people still support it – **38%** said they would and **33%** said they possibly would. That gives a total of **71%** of the survey still prepared to give at least some element of support to a safe standing area if sitting was more strictly enforced elsewhere. The proportion of respondents who would not was **18%**.

Some **67%** would consider buying a Season Ticket in a safe standing area, with **63%** believing it should cost less than a regular seat. However, **69%** would still consider buying a safe standing Season Ticket if it cost the same as a regular seat, or more.



ON FIELD

While THST's focus is off-pitch, we always take soundings with some general questions about team performance and what the perception of the Board's stewardship of the Club is.

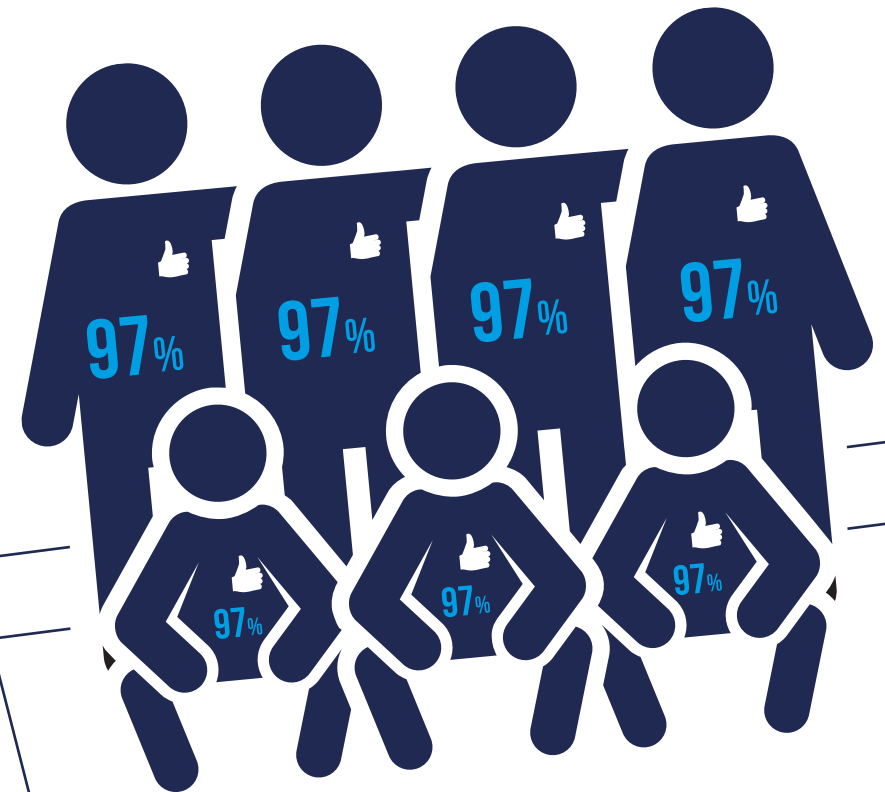
In what is certainly the least surprising finding, **97%** were satisfied with THFC's on field performance last season, the highest rating since we began the survey four years ago. Some **54%** were satisfied with THFC's transfer policy and **96%** with the homegrown/academy approach.

Looking ahead, **90%** think the Premier League should be the priority next season followed by the Champions League, then the FA Cup and League Cup.

Asked about ENIC's stewardship over the past 5 years, **83%** felt that had improved, the highest rating yet returned in a survey. And **79%** had confidence in ENIC's long term strategy for the Club – again, the highest rating yet returned.



PRIORITIES 17/18



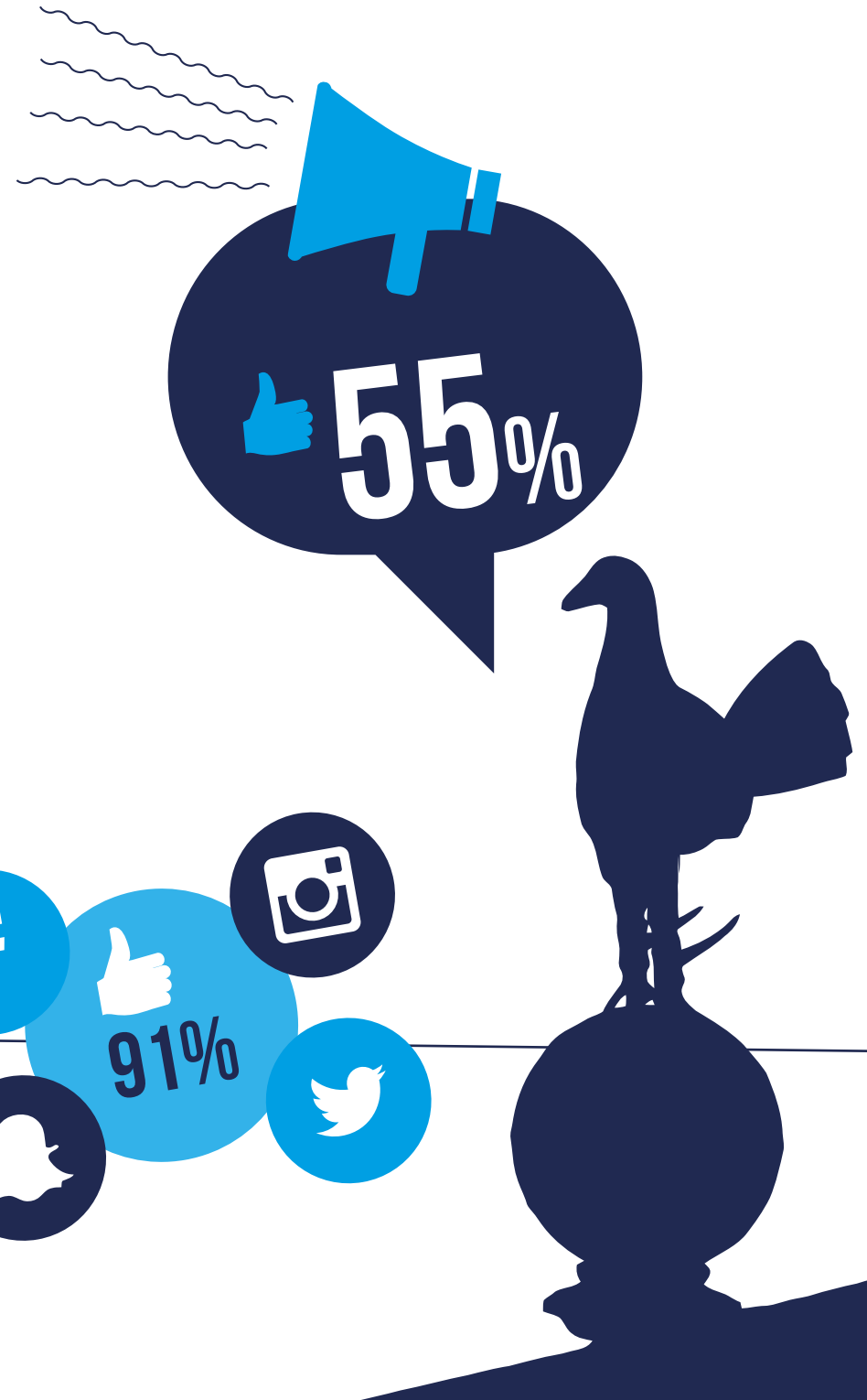
THFC COMMUNICATIONS

Some **55%** were satisfied with the way THFC communicates with supporters, with **14%** expressing dissatisfaction. This is roughly in line with the previous season (**55%/15%**) and improved significantly from the high levels of dissatisfaction expressed in the first two years of the survey.

Communication had improved over the past five years according to **62%** of respondents, slightly down on the previous season's figure of **67%**.

Some **71%** felt an AGM style meeting, where the Club reported back to the fans, was a good idea – meaning support for this idea has run at over **70%** each year we've asked the question.

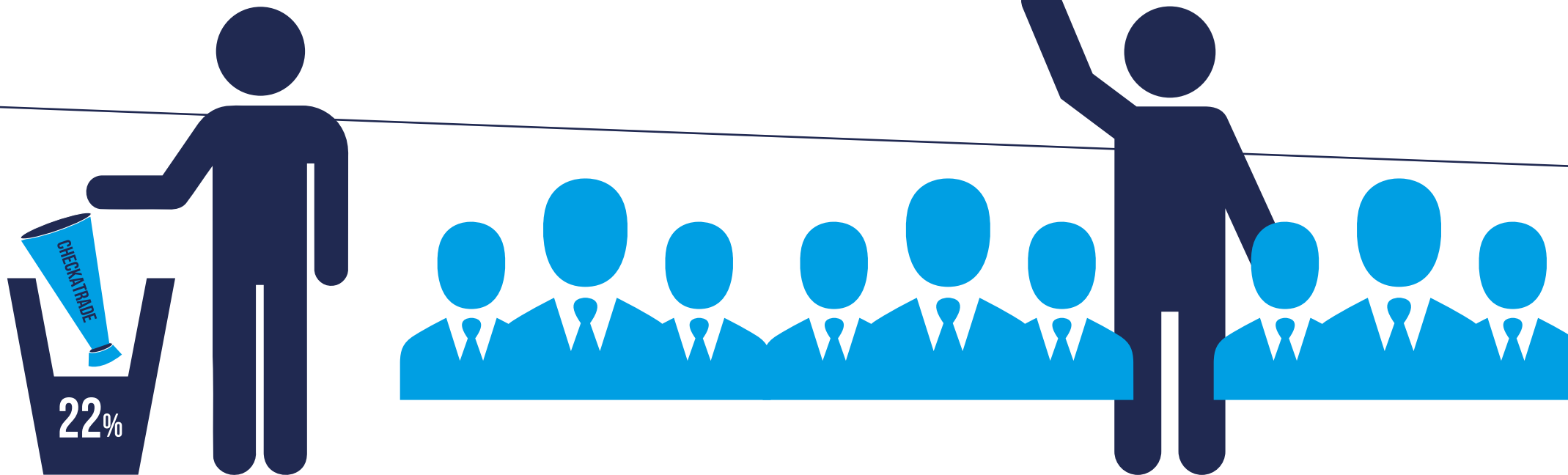
Only **18%** were aware of the role of the Supporter Liaison Officer (SLO), while **91%** felt Club-run social media accounts for ticketing and customer services would be beneficial to them.



WIDER FOOTBALL ISSUES

We asked a few questions on wider football issues. These revealed that **56%** of respondents felt legislation was needed to reform the way in which football is run, with **75%** thinking that club Boards should include independent or fan directors.

Just **22%** agreed with Premier League B teams competing in existing competitions with Football League Clubs – with answers coming in just as THFC made the decision to enter an Academy team into the Checktrade trophy.



THST

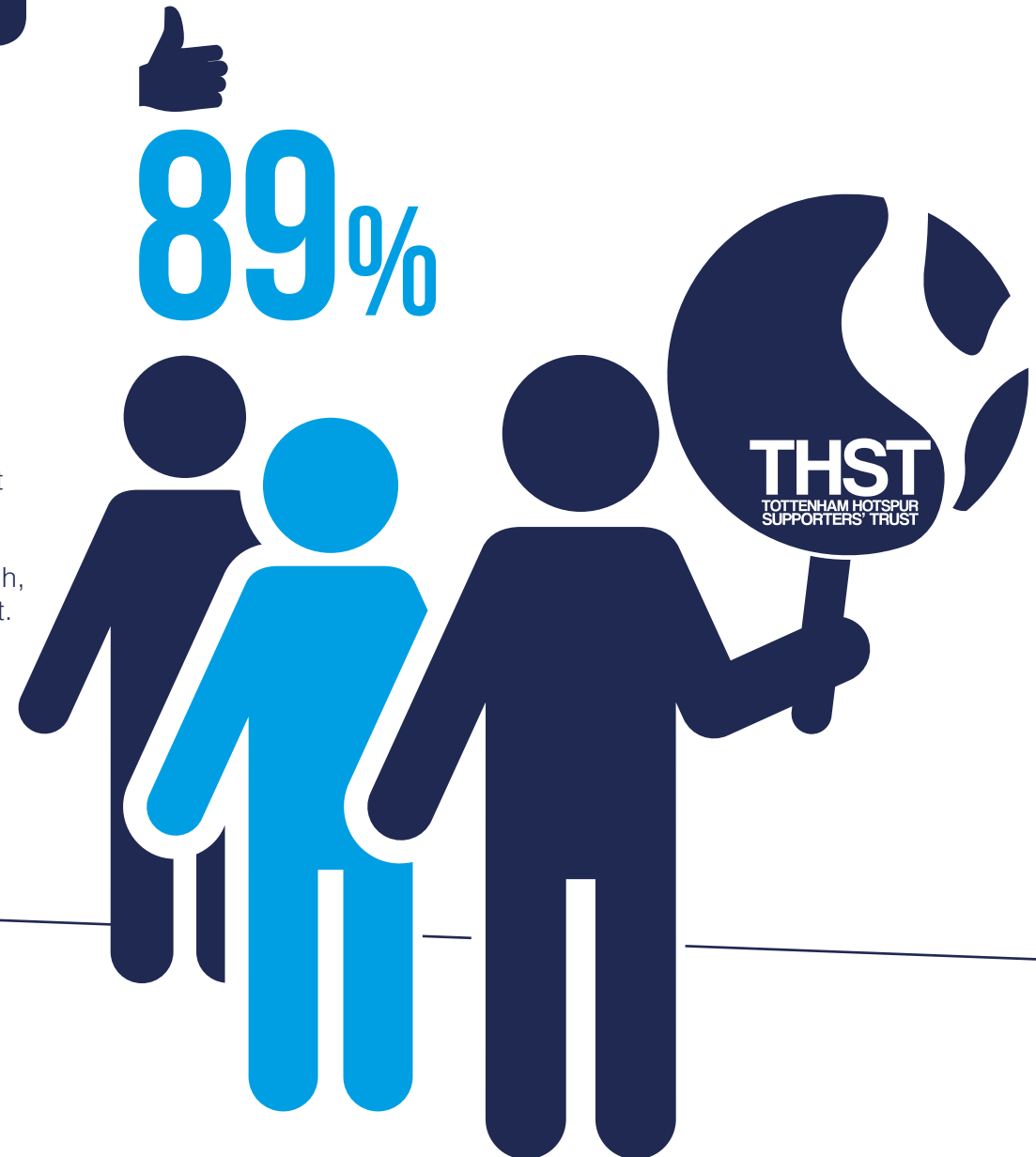
It's important we find out fans' view on what we are doing too, and the results are very encouraging.

Some **89%** of Trust members were satisfied with the work of THST last season compared to **76%** of the overall response, the highest satisfaction rating we've had in four years.

And **89%** of members felt THST had been successful with its campaigns, compared with **77%** of the overall response.

Ticket pricing, migration of fans into the new stadium, atmosphere and fan/Club relationships were identified as the key areas to focus on next season by all respondents.

Some **80%** of Trust members felt THST communicated with fans enough, with **77%** feeling the approach to dealing with the Club was about right. Again, these are the highest positive ratings we've had in four years.



CONCLUSION

We'd like to thank everyone who took the time to fill the survey in with constructive responses. Like any membership organisation, we can never claim to be able to put forward every view of every member all the time. What we can do is try as best we can to ask for and understand opinion on the issues that fans care about, and to attempt to put those views to the Club.

We are the largest independent organisation of Spurs fans, and this survey is the most extensive carried out regularly of fan views. The findings of this survey, and the experiences and views we share with supporters as ordinary match-going fans, inform the positions we take day to day.

The more members we have, the more accurately we can reflect opinion, and the stronger our voice becomes. We are greatly encouraged both by the approval shown for our work and the growing numbers of fans signing up for membership.

Thank you, and we promise to continue working hard on your behalf in the months ahead. We do so solely because we believe the voice of fans should be heard at the highest level of the Club.

THANK YOU



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