



# THST FANS SURVEY 2016

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# INTRODUCTION

In June, we ran our annual survey into key issues affecting Spurs fans. This is the third time we've run what is a major exercise assessing supporter opinion, and the results are used to inform our work and to help illustrate fan views to THFC. The survey, that contained 90 questions, was completed by 1,650 fans, both Trust members and non-members, with 39% of total respondents being THFC Season Ticket (ST) holders, and 43% One Hotspur members.

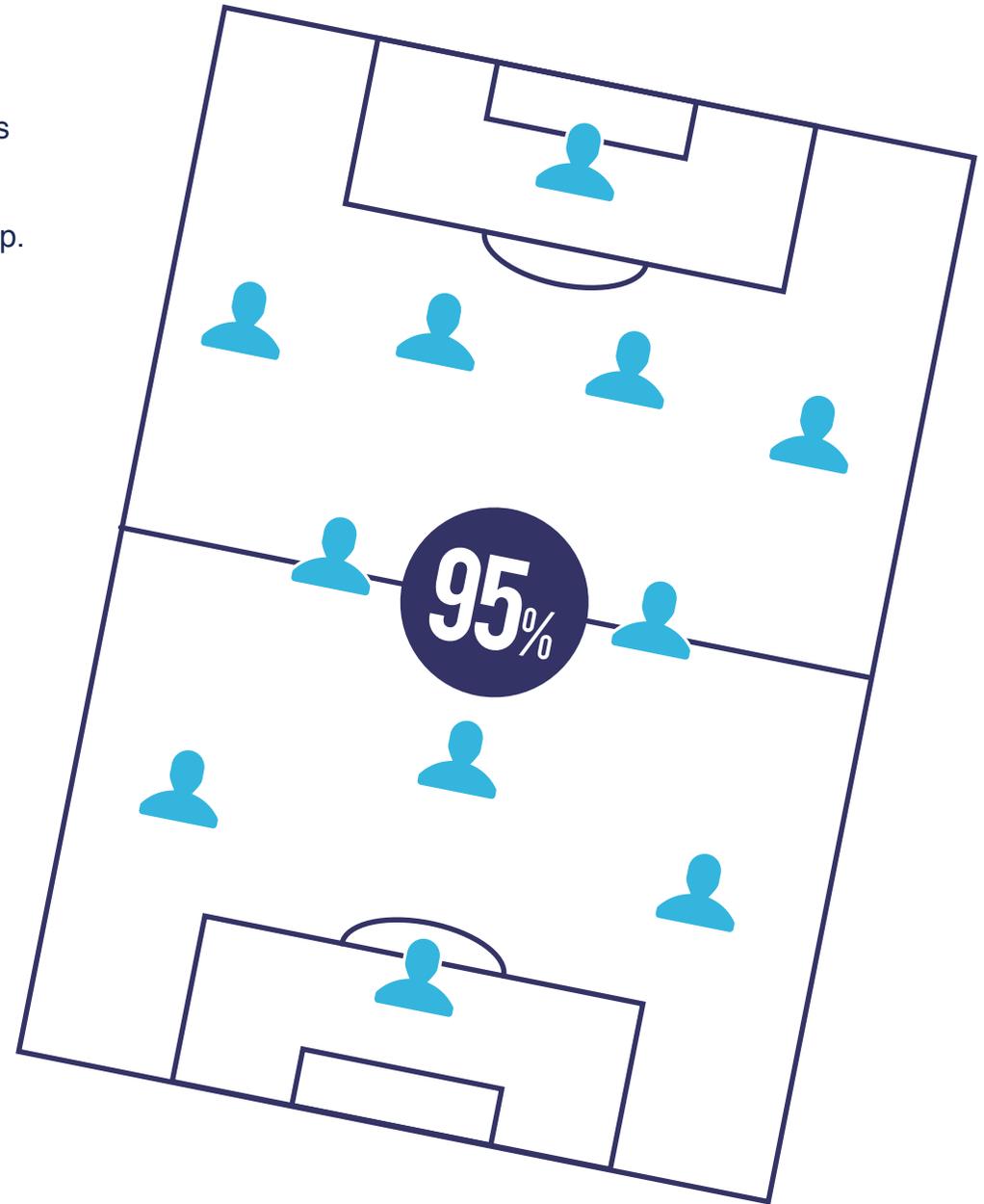
We face some challenging times. This season, we have a reduced capacity at White Hart Lane; we will be playing Champions League games at Wembley Stadium, and we will be preparing for the move to Wembley for the season away. So it's more important than ever we get to hear what fans think, and more important than ever that we have a strong Supporters' Trust able to both articulate fan views and work with the Club where necessary.

**1650**  
**FANS** 



# THE TEAM AND THE CLUB

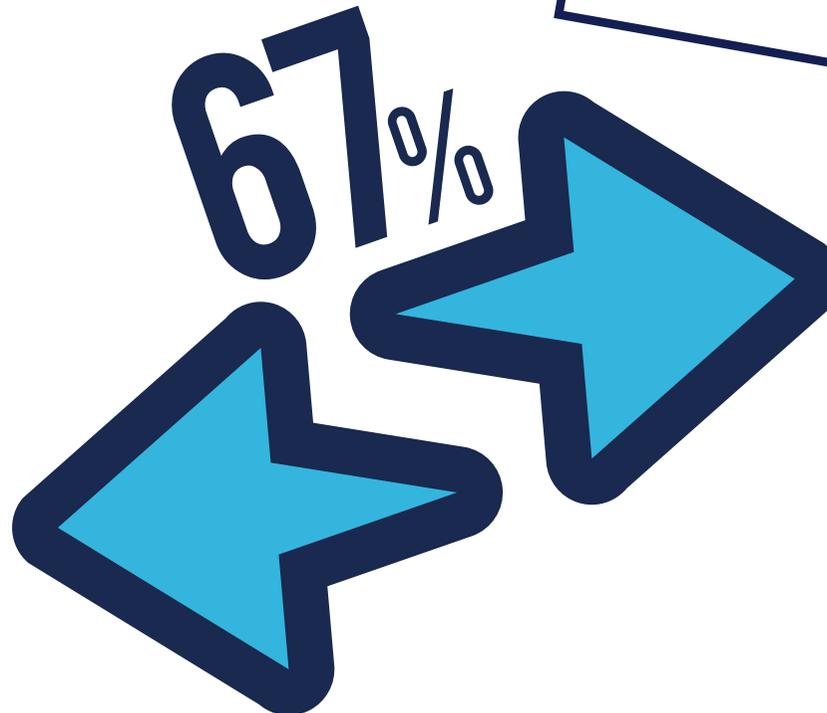
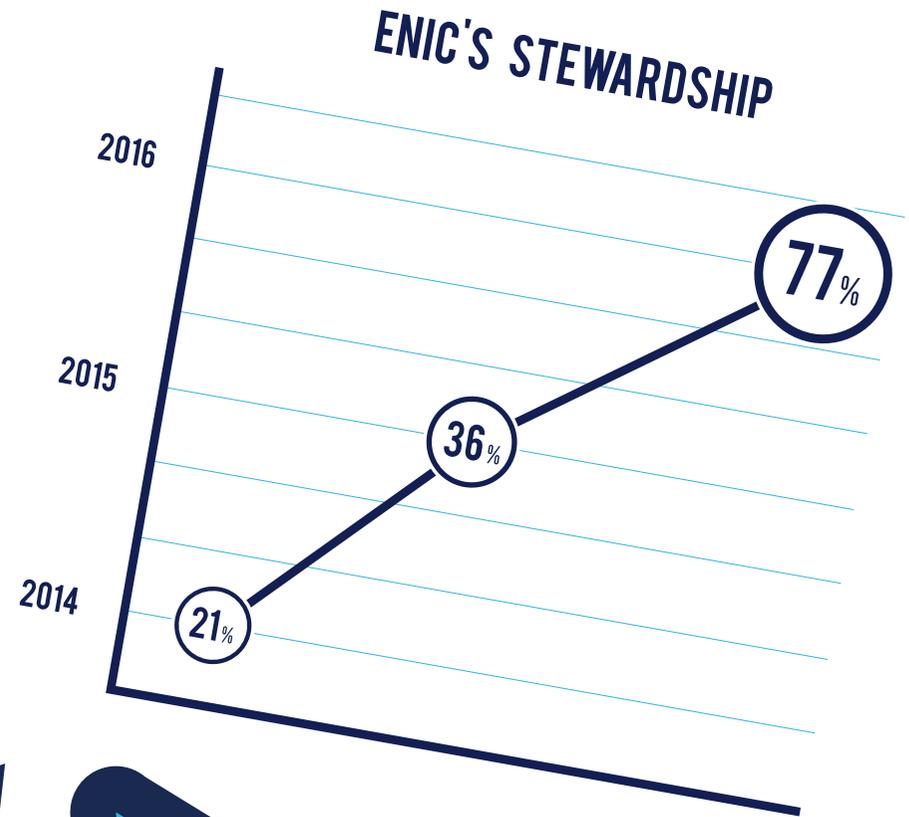
It will come as little surprise that 95% were satisfied with the team's performance on the pitch last season. Looking ahead, 88% want focus on the Premier League next year. The Champions League came second in order of priority, followed by the FA Cup and the League Cup.



# THE TEAM AND THE CLUB

Results off the pitch are encouraging too. A healthy 77% of you thought ENIC's stewardship of the Club had improved over the last five years. That is a huge increase on the results from the previous two years of the survey. In 2014, only 21% thought ENIC's stewardship had improved in the past five years, with 36% saying the same in 2015.

On transfer policy, 67% were satisfied, compared to just 22% last year. And 95% are happy with the academy policy, up slightly on last year's 92%. Some 72% are confident in ENIC's long-term strategy for the club, up significantly on last year's figure of 44%.

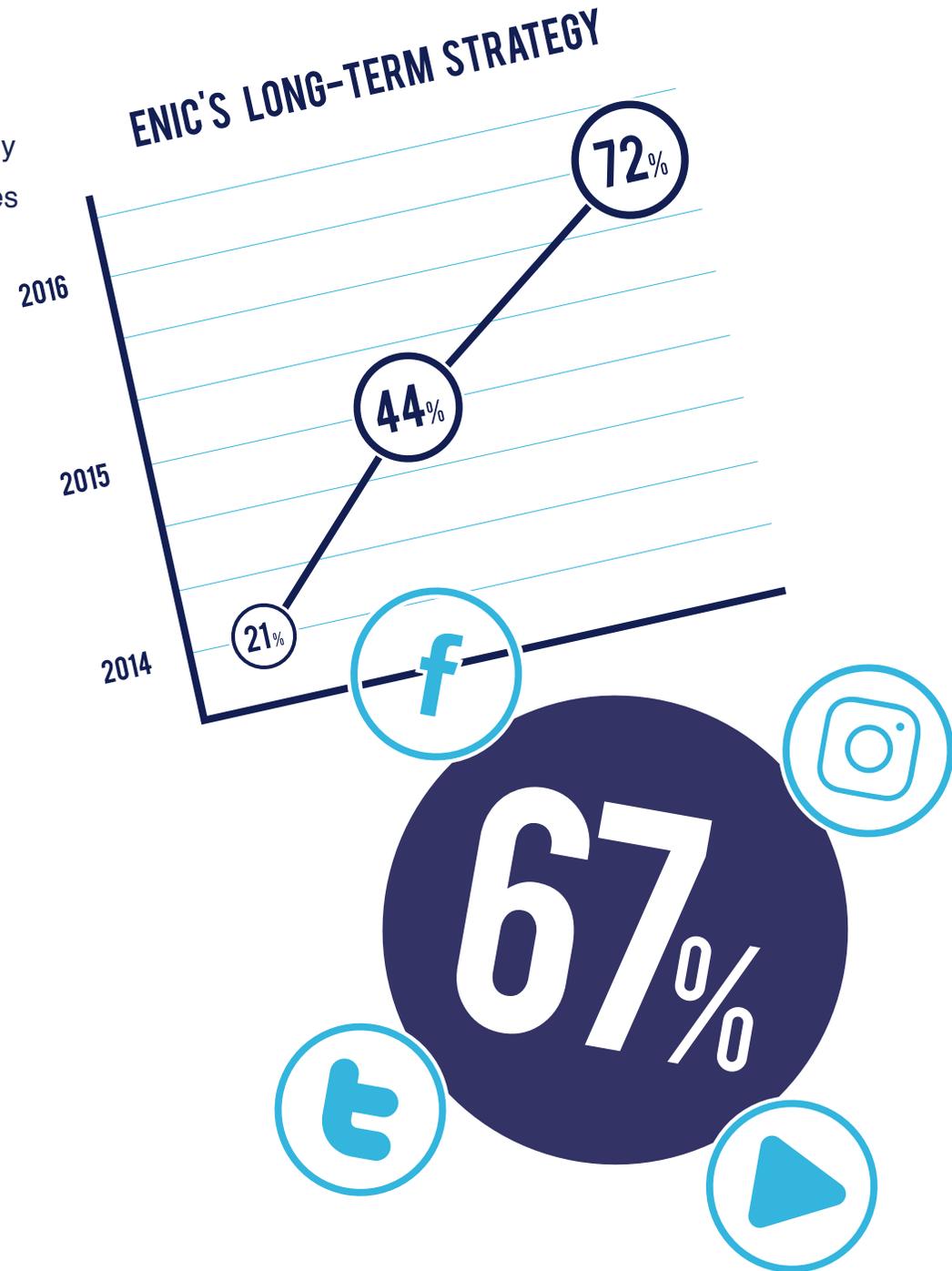


# THE TEAM AND THE CLUB

Communication improved: The team's performance on the field undoubtedly has some influence here, but your views on the way the Club communicates with fans show that improvement may be deeper seated. This is especially encouraging for THST, which has the improvement of communication between Club and fans at the heart of what we do.

In our survey, 54% were satisfied with the way the Club engages with fans, and 67% said Club communications had improved in the last five years. This is a huge improvement on the 64% who were dissatisfied in 2014, and on the mere 9.5% who thought there had been any improvement in the five years preceeding 2014. Asked what you liked best about the Club's communications, social media activity, especially the #TogetherTHFC hashtag, and communication with THST came out far in front of anything else.

You're also very keen indeed on more fan forums and on an annual meeting in which the Club reports back to fans. Awareness of the role of the Club's Supporter Liaison Officer is increasing but, with 62% saying they are unaware of the post (compared to 74% in 2014) or what it is for, there's clearly still some work to be done here.

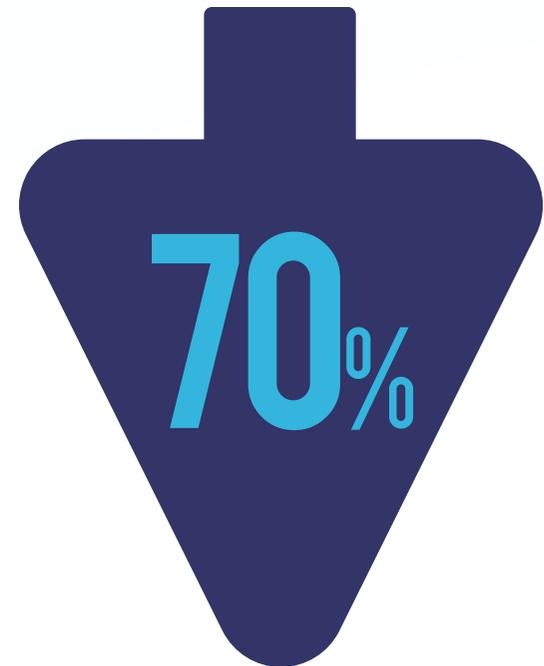


# TICKETING

The message coming through loud and clear from fans is that home Premier League ticket prices are too high. Only 27% were satisfied with them.

The £25 cup tickets policy is working, with almost 63% satisfied, and a comparable 59% satisfied with the pricing of home European games. The Club's decision to drop the progressive pricing policy for the Europa League game against Dortmund was opposed by 58% of our survey, with a further 18% saying they would have accepted an increase on the £20/£25 price point but not as much as the one imposed, which moved the game into price categorisation. Only 19% felt the Club got its pricing policy right for this match. We will be emphasising to the Club the positive benefits of consistently applying the progressive cup pricing policy.

The Club's decision not to reduce the price of Bronze membership for next season despite the loss of benefits attached to this package is deeply unpopular, with 70% saying the fee should have been reduced by £5 to the Lilywhite price point. Fewer than 10% thought Bronze membership still offered value for money. This was a view THST put to the Club strongly.

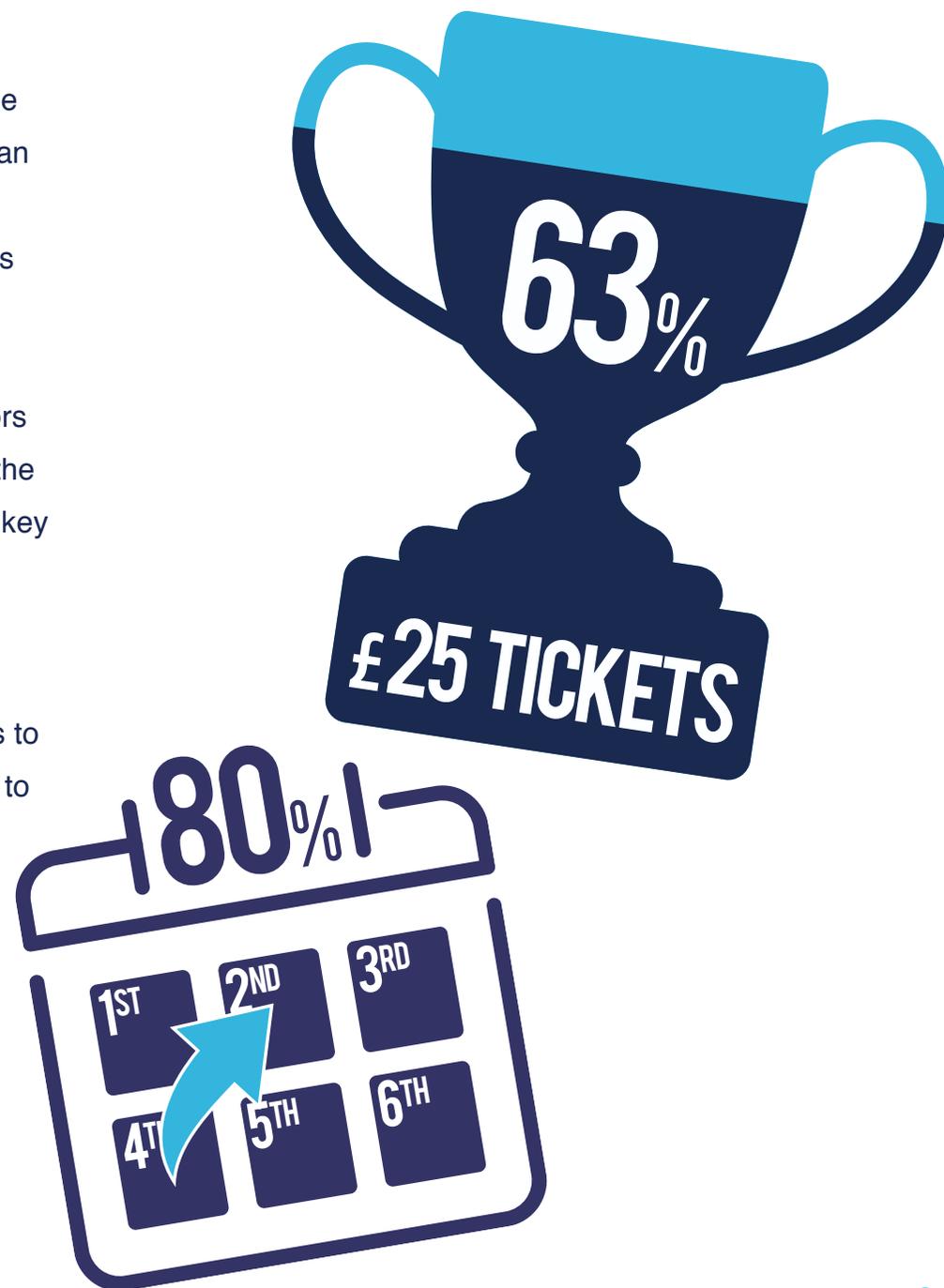


# TICKETING

*Away price cap:* The coming season will see the introduction of a £30 price cap for all away tickets in the Premier League. We asked if this would mean fans applied for more away games, and 47% said it would. But 42% were either not sure or said it would make no difference to the number of games they applied for.

When we delved further, you told us price was only fifth on the list of factors influencing the decision to apply for an away ticket. The time and date of the game was by far the biggest influence, with 82% citing this reason. Other key factors were location, travel options including cost of travel and work commitments.

*Kick off times key:* It's clear that kick-off times and especially late changes to them are the most significant issue for fans when deciding whether or not to attend matches. Some 80% said they were inconvenienced by fixture changes, with 77% wanting better alignment of ticket on sale dates and applications announcements with TV picks.



# TICKETING

In the previous three seasons, THFC has offered subsidised travel on trains, planes and coaches to some away games as part of the Premier League's Away Supporters Initiative (ASI). Some 70% were aware THFC offered subsidised travel, but only 18% used it.

The ASI has now been withdrawn after the introduction of the £30 away price cap. However, 81% of our survey respondents said they wanted the Club to continue offering subsidised travel in the coming season, a figure brought into sharper perspective by noting the increased number of fans using trains to travel to away games.

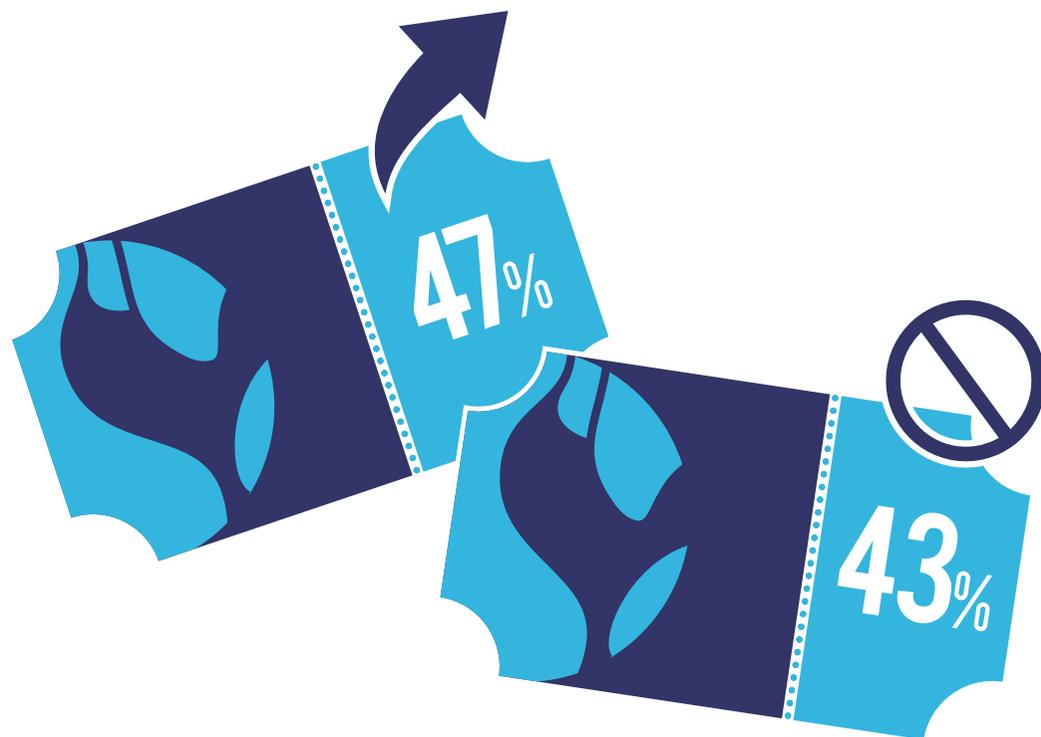


# WEMBLEY

Once it was known that the Club would have to play away from White Hart Lane while the new stadium is built, THST campaigned hard for Wembley as the best available alternative venue. That position has been backed in survey after survey, and this year's annual survey found 72% of you backing the decision to play home games at Wembley for the season away.

The move to play Champions League Games at Wembley next season was backed by 69% of respondents, with 82% citing insufficient seats at White Hart Lane as their understanding of the reason for the move.

*Season ticket amnesty:* The question of whether the Club should give ST holders the option of not taking up a ST for the season at Wembley without losing loyalty points (an amnesty) divided opinion. Just over 44% said it was reasonable for the Club not to offer an amnesty, with 34% saying an amnesty should be offered. Among ST holders, 43% said it was reasonable for the Club not to offer an amnesty, but 47% said they thought there should be an amnesty.



# WEMBLEY

Those wanting an amnesty to be offered cited two main reasons. First, they saw their purchase of a ST as a permanent choice to watch THFC at home at White Hart Lane. So, for them, the move to a 'home' at Wembley represented a basic change in the product. Second, while Wembley was preferable to other options, travel for midweek games in particular would still cause significant problems for some.

*Travel to Wembley:* We asked if travel to and from matches at Wembley would cost you more than travel to White Hart Lane, and 47% of you said it would. THST's position has always been that fans shouldn't bear extra costs because of the Club's need to move, and so we will be discussing with THFC how to ensure there's parity of cost for fans at Wembley Stadium.

Rounding up other opinions on Wembley, 44% said they would like to sit with the people they currently sit with at White Hart Lane, 78% wanted to see designated sections for more visual and vocal support (*with 67% saying they would sit in those sections*).



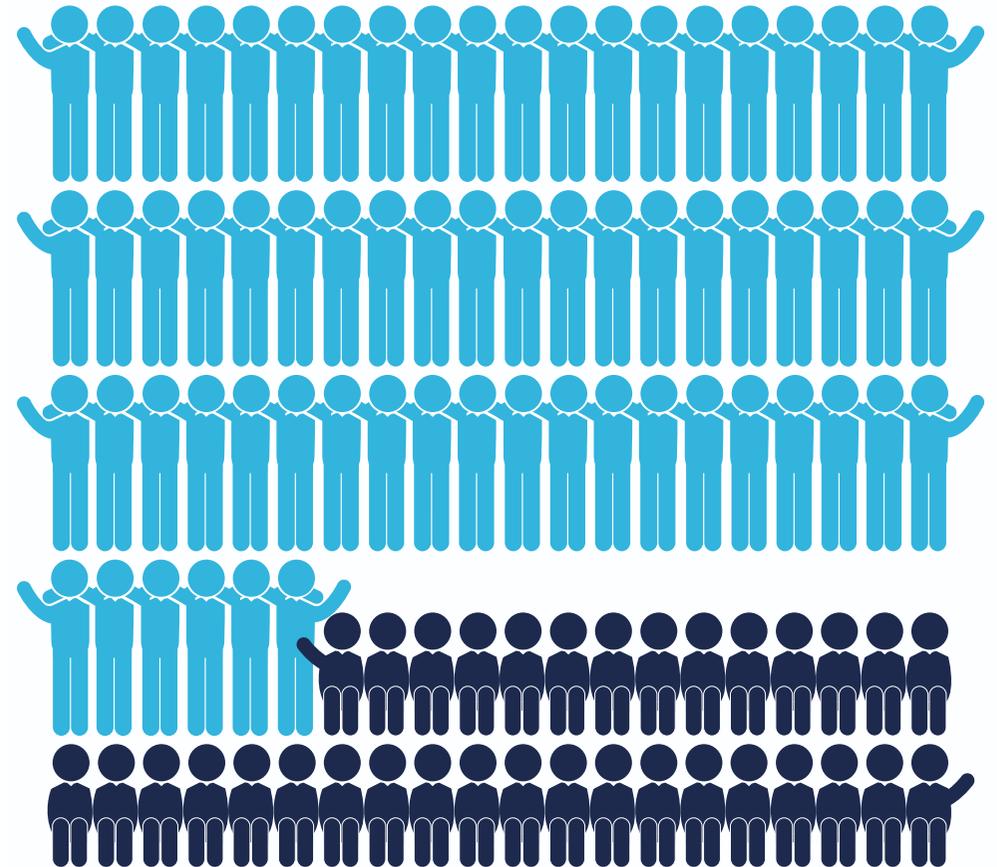
# THE NEW STADIUM

We wanted to gauge opinion on pricing, seating preferences and attitudes to safe standing in the new stadium. Our survey results show price is going to be the overwhelming influence on the decision to buy a ST in the new stadium, with 73% citing this factor above all others. Asked where they'd prefer to sit, based on what is currently known about the new stadium, 65% expressed a preference for the single tier south stand.

A safe standing area in the new ground was backed by 66%, with 43% saying they would consider buying a ST for such an area. And 63% thought tickets for a safe standing area should be priced lower than those for regular seats.

*Stretch pricing:* Some 79% said they favoured a stretch pricing policy, in which corporate and top-priced ticket prices are set high and prices at the lower end of the scale are reduced. But 48% would not like to see a higher proportion of corporate and top-priced tickets in the stadium. That clearly presents us with a problem when we are arguing for a position.

Asked what the purpose of the ticket pricing policy in the new stadium should be, 44% said to use the greater capacity to bring down the cost of all tickets.



# ATMOSPHERE

There was a lot of debate over atmosphere in the ground last season, so we tried to delve deeper into what fans are thinking. What stood out in this section was that over 60% thought flags and banners in the stadium lifted the atmosphere, with just 11% thinking they looked contrived. However, only 30% said they were likely to take flags and banners in. So we need to push the message harder that fans need to make things happen, rather than wait for them to happen.

*Home and away:* It appears the home experience is a positive one, perhaps not surprisingly after the season we had last year. Some 70% said they were happy with the atmosphere at home games, with satisfaction rates for stewarding and policing at home running at over 65%. For away games, 77% said they were satisfied with the atmosphere. Again, policing and stewarding at away games generated high satisfaction rates, 34% and 47% respectively.

It was also interesting to note that 52% of respondents were in their seats for home games 30 minutes or more before kick-off. Asked what would get more of you in earlier, 52% said better catering – with 72% saying price prevented them buying food and drink inside the ground, followed by 65% citing poor quality.



# THE BIGGER PICTURE

We took soundings on some of the bigger issues affecting football generally. We found 52% agreeing that legislation was needed to reform the game, with 75% saying that legislation should require clubs to have independent supporter reps on their boards.

The idea of Premier League B teams competing against Football League clubs in existing competitions was rejected by 56%.

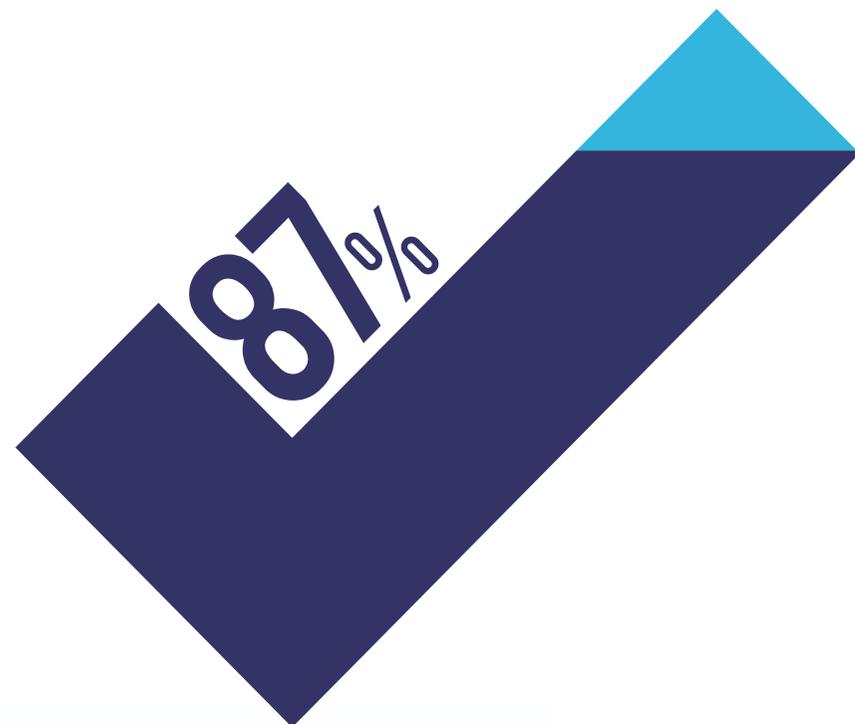


# THST

We wanted to find out how Trust members judged what we were doing. We're highly satisfied that 87% of you think we're doing a good job, with 76% saying the level of communication we have with our members is about right. Social media and our monthly newsletter remain the means by which most of you keep up to date with what we do.

Over 90% of you thought we'd been successful on the issues we've campaigned for, and ticket pricing and the new stadium remain by far the biggest priorities you want us to focus on. Our dealings with the Club are judged to be about right by 78% of members, with just 11% thinking we're too soft.

When we looked at the answers to the same questions from the wider fan base, rather than just Trust members, the approval ratings were a little lower, but still running at high levels. So, for example, 78% thought we were doing a good job, 69% thought our dealings with the club were about right, and 69% thought we communicated well.



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# THST

We are never complacent and we know we need to attract more members and get our message out more widely. But what's encouraging about these findings is that, where fans are aware of us and listen to our explanations of what we do, we have very strong support.

Thank you to every fan who took part. We'll continue to build on our successes as we move into the 2016/17 season.



**THANK YOU**