



CHELSEA SUPPORTERS' TRUST 2014 MEMBERSHIP SURVEY

ABOUT THE SURVEY

The survey was conducted during July and August 2014 and was designed with the aim of identifying the issues that Chelsea supporters care about. It sent out to approximately 1650 Trust members. The overall response rate was 40%.

SUMMARY

As for the previous survey (conducted in season 2012/13), membership of the Trust consider the current price of tickets to be a barrier to the involvement and enjoyment of following Chelsea on several different levels: in particular the aging demographic of current support and the lack of atmosphere. Participants in the survey believe that extending the age range for youth concessionary tickets (as many other clubs have done) and increasing availability of these would go a long way to resolve these issues. It is noted that employment of categorised match pricing by many clubs (including Chelsea) results in supporters of 'successful' teams paying premium prices for many away games. Approval of Club administration and on-field performance is markedly improved compared to last season. Doubtless the re-appointment of Jose Mourinho has influenced this, but supporters also acknowledge the benefits the Club have provided in the form of subsidised away travel and tickets (spending a great deal more than the monies provided by the Premier League from the new TV deal) and the setting up of a not-for-profit in-house ticket exchange to replace the much disliked Viagogo.

Last season the majority of members indicated that winning trophies every year was not the sole reason for supporting Chelsea and that they were willing to accept a period of transition. This has proved to be the case; in this survey only a tiny minority stated that their feelings about the season influenced their decision to renew season tickets. In season 2012-13, a third of respondents were considering their options.

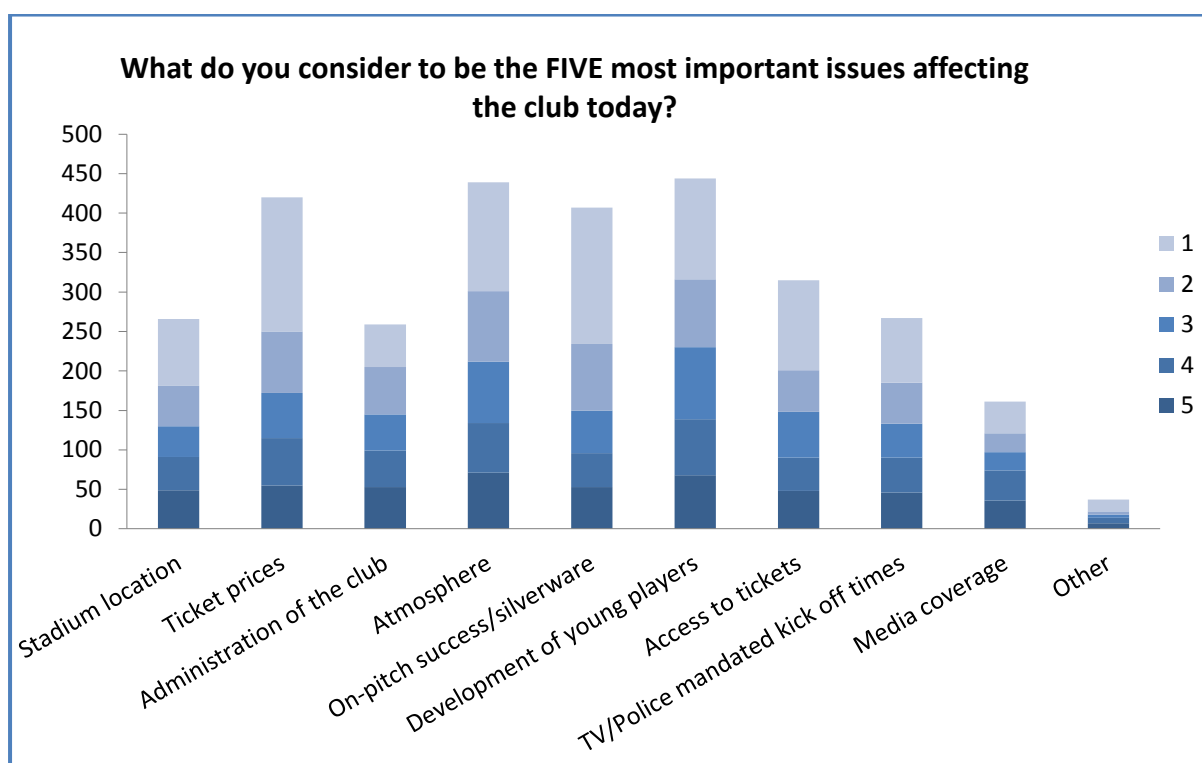
Atmosphere at home continues to be a major concern for supporters (and the manager!). The CST campaign for safe standing last season has put this in the forefront of supporters' minds with this being the most frequent suggestion for improving the ambience at Stamford Bridge. As well as ticket pricing, particularly for younger supporters, many CST members believe that overzealous stewarding is also a major cause of the problem.

Over a third of respondents to the survey were overseas supporters. They have their own unique issues with access to Chelsea TV and new rules for official Supporter Clubs threatening to reduce the number of True Blue Members, particularly in the USA.

KEY ISSUES

Members were asked to rank in order of importance what they considered to be the five most important issues. The rest of the survey explores these key issues in greater depth.

The highest importance was given to **Ticket Prices** and **On-pitch success**, followed by **Atmosphere**. Receiving the most votes overall were: **Development of Young Players**, followed by **Ticket Prices**



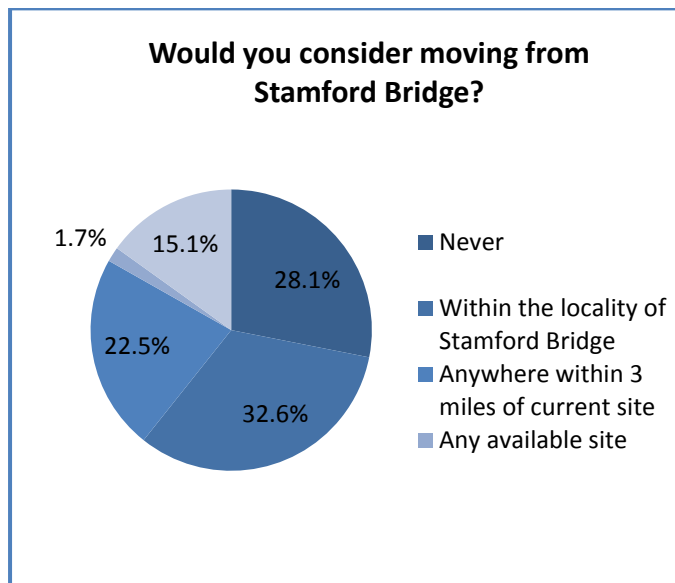
The **Other** issues raised by members, in order of frequency were:

1. External perception of the Club
2. Overseas supporter relationship with the Club
3. Future of Stamford Bridge
4. Safe standing
5. Young supporters and concessionary tickets
6. Diversity – racism, sexism, homophobia
7. Matchday services
8. Club attitude to supporters
9. Financial Fair Play

Ticket Prices were also the number one concern in last year's survey, and **development of young players** and **ticket prices** also received the highest number of votes. However, **Club Administration** has become less of an issue for supporters. An additional category has been included this year – **Kick Off Times** – following feedback from supporters.

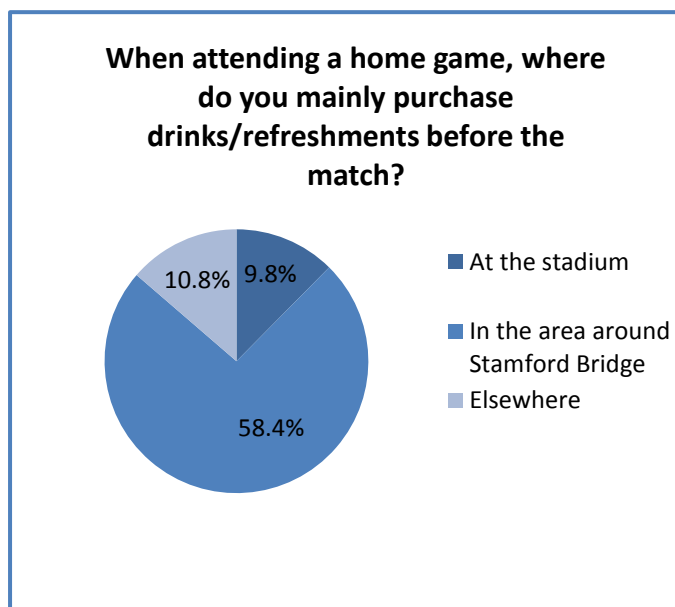
THE STADIUM

Location



Following feedback, the options for this question were changed from last season's survey. The largest group of respondents are those that state they would like to remain **Within the Locality of Stamford Bridge**. Taking these with those that state they would **Never** move from the current site, over 60% of those taking part in the survey want to remain in the current area.

Facilities

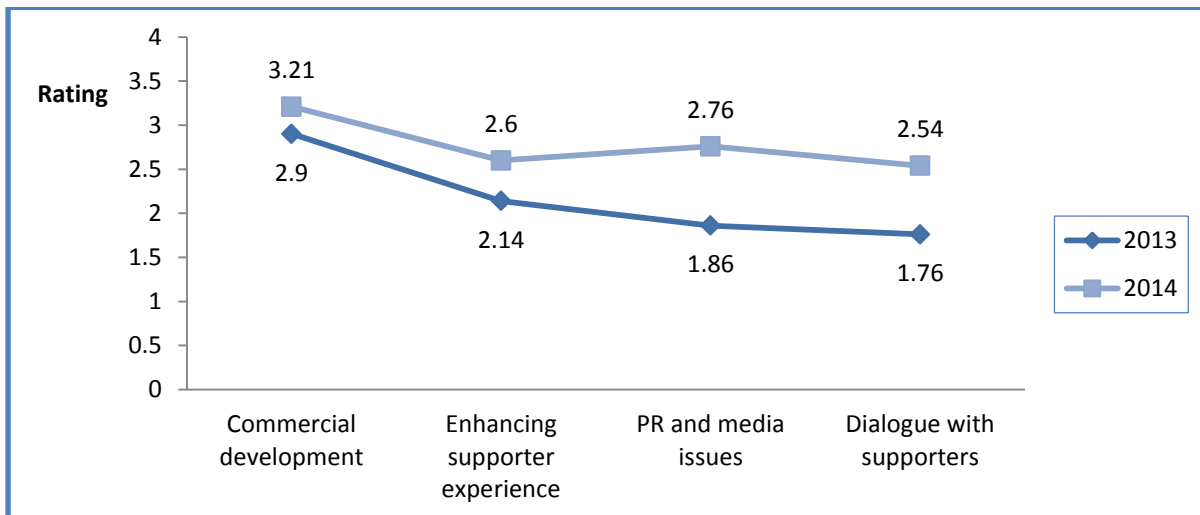


Stamford Bridge is fairly unique in being situated in an area with plenty of local amenities and this is reflected by members' choice of where they eat and drink on a match day.

CLUB ADMINISTRATION

Satisfaction Rating

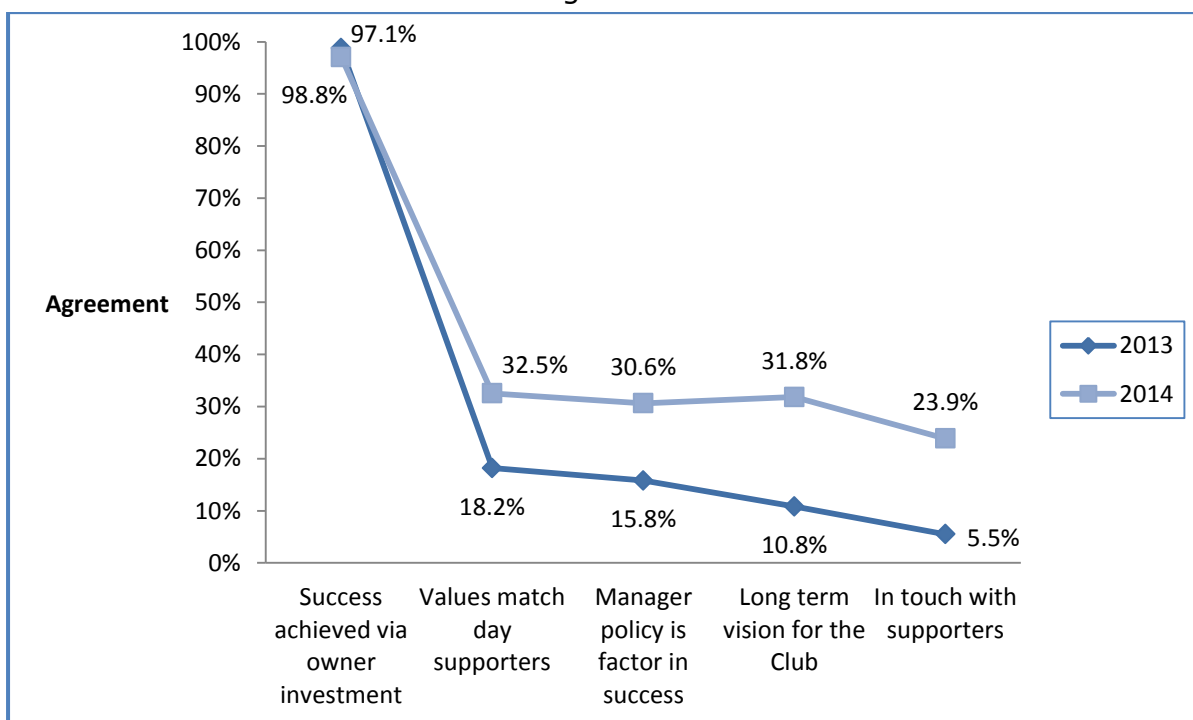
Members were asked to rate their satisfaction with the Club Board over the last 3 years in relation to a number of issues. The higher the rating value (maximum 4), the more the satisfaction (Don't Knows have been excluded):



- Overall there is a significant improvement in satisfaction ratings from last year's survey.
- For everything apart from the commercial and business aspects of the Club, respondents are still marginally dissatisfied with other aspects; in particular the club's dialogue with the supporters.

Club Policies

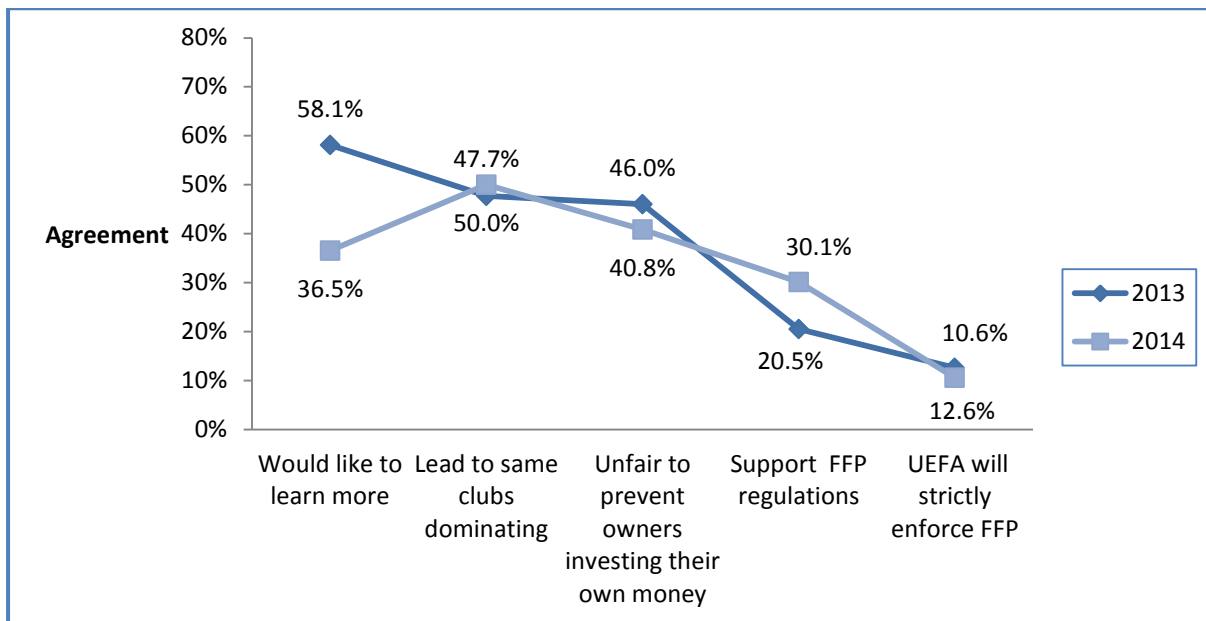
Members were asked to select their agreement with a number of statements:



- Almost everyone agrees that the investment of the owner has been a key factor in the club's recent success and there is no significant change in this opinion from last year's survey.
- There is a very significant increase in agreement with the other statements, rising by 15-18 points from the last survey.
- However, it is still a minority that agree with these statements: less than a quarter believe that the Club is in touch with supporters and around a third concur with the other statements.

Financial Fair Play

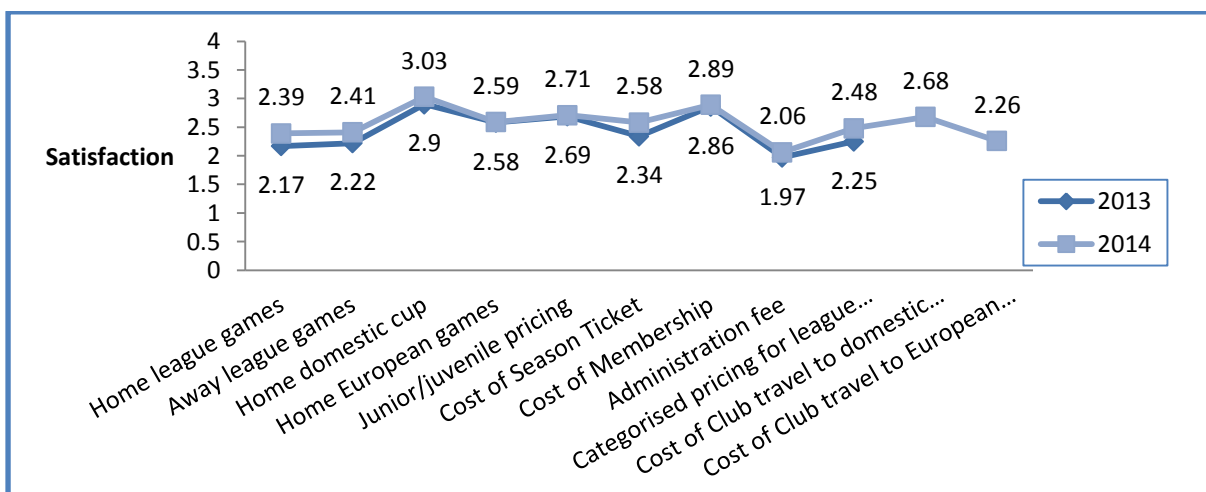
Members were asked to indicate their agreement with a series of statements concerning the UEFA Financial Fair Play regulations:



TICKETING

Ticket Prices

Members were asked to rate their satisfaction with regard to the ticket pricing. The higher the rating value (maximum 4), the more the satisfaction (Not Applicable/Don't Knows have been excluded):



Members were also asked to provide their comments on ticket pricing and the following key themes emerged:

Sustainability

- As for last season, there is agreement that the traditional supporter is being priced out of Premier League football.
- Again there is concern expressed that the current cost of tickets make it almost impossible to cultivate the next generation of regular matchgoers.
- Whilst acknowledging that ticket prices at Stamford Bridge have remained stable, respondents emphasise that the current economic down turn is reducing their ability to attend games because of the cost.
- Many note that the European cost model, particularly in Germany is ensuring that match day support is sustained across all generations.
- It is acknowledged a limited capacity at Stamford Bridge could impact ticket pricing.

"When travel costs are taken into consideration, just attending all 18 home league games accounts for around 10% of my gross income."

Concessionary tickets

- Following on from the theme of sustainability there is dissatisfaction with regard to the situation concerning reduced price tickets.
- Parents of under 18s would like to be able to purchase youth tickets in more areas of the ground for league games

"Long term juvenile's that reach 18 years old and go onto full time education MUST be allowed to maintain the juvenile rate - they have no income and significant costs/loans in education."

- There is a strong body of opinion that youth concessions should be extended to an older age group; students remark they have no income and young people in work earn insufficient to purchase match tickets even on an irregular basis.
- A female pensioner queries why she must wait until she is 65 to obtain a concessionary price even though she is living on her state pension.
- The practice of not allowing concessionary tickets to be upgraded is also questioned, particularly mid-week where it is not always possible to take children on a school night.

The Cost of 'Categorisation'

- The practice of categorising match prices, based on the opposition is hitting supporters both at home and away.
- Some suggest that a standard away ticket price should be charged across the board so that supporters of successful teams are not penalised for their achievement.

"Difficult to complain about clubs hiking up prices for Chelsea fans when we do the same for big games. Categorised pricing is wrong and unfair on fans of a select number of clubs."

European Tickets and Travel

- Many commented on the often high price of charged by opponent clubs for European games
- Members were critical of cost and availability of Club travel to European games

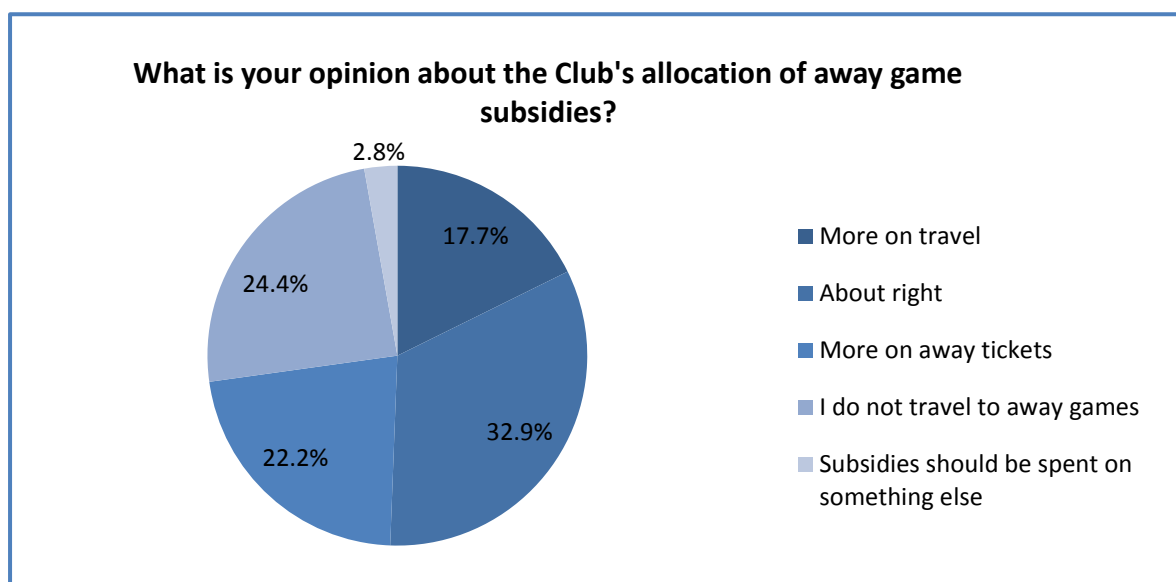
- Other issues raised included the arrangements for sales of tickets, lack of support given the turnaround time between games in the knock out round and the Club arrangement of domestic ticket sales while supporters are away in Europe.

Other Issues

- Administration charge should be levied per transaction, not per ticket
- Several supporters remarked that the high price of tickets is a barrier to improving the atmosphere at Stamford Bridge
- Many respondents took the opportunity to thank the Club for subsidised travel and away tickets during the season.

Subsidies for Away Support

The survey also asked members their opinion about how monies provided by the Premier League and the Club to subsidise cost of supporter attendance should be allocated:

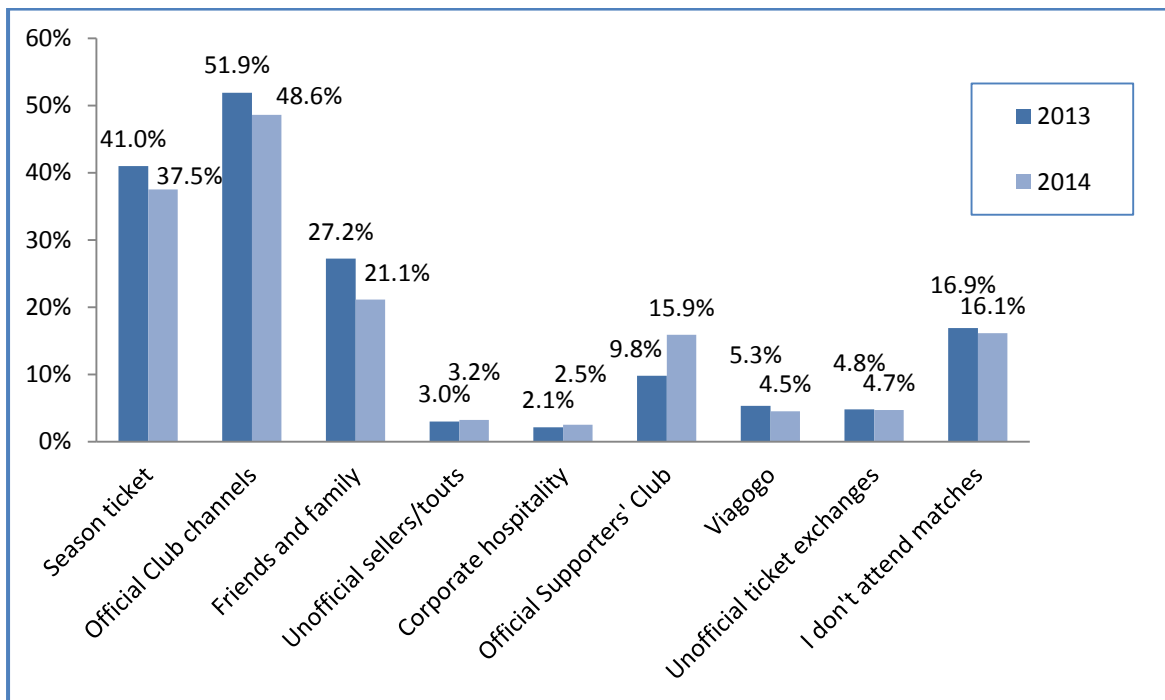


Suggestions for other ways in which the subsidies could be used included:

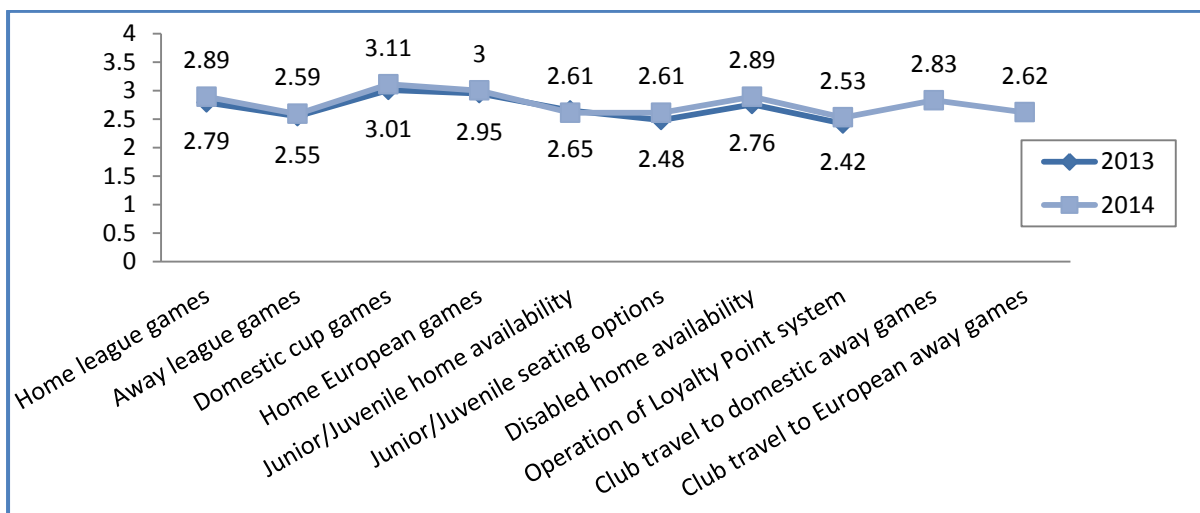
- Reducing ticket prices in general
- Extending the age range and availability of juvenile tickets for league games
- Subsidy of official Supporter Club travel to benefit those not based in the Greater London area

Access to Tickets

Members were asked how they obtained their tickets, selecting all options that applied. Over half purchase their tickets through the club. This has not changed significantly from last season.



Members were asked to rate their satisfaction with regard to their ability to obtain tickets. The higher the rating value (maximum 4), the more the satisfaction (Not Applicable/Don't Knows have been excluded).



There is a small improvement in approval ratings compared to last season. Questions about availability of Club travel were also included for the first time.

Members were asked to comment on their experience of and opinions about ticket accessibility and the following themes emerged.

Loyalty points

Loyalty points were the subject of an in-depth survey last season as the award and use of these is particularly contentious. Members had many points to make in this survey including:

- There was disappointment that loyalty points were not used for purchase of Crystal Palace and Fulham away ticket. All London derbies are bound to be popular because they are easy to travel to. Apart from Tottenham and Arsenal, we receive a small allocation for the other London clubs so demand for these is at a premium. [Crystal Palace away tickets were sold by loyalty points this current season, after change to Club policy for all London away games to be allocated by loyalty points]
- Many believe that loyalty points should reflect support over more than one season. Not only does this reward longstanding loyalty, but it also reconciles the anomaly of having to gain majority of loyalty points early in the season in order to have sufficient later on. This is not helped by high number of points being awarded for games that are perceived by the Club to be less popular, rather than for timing of and travel to games.
- There is concern that the Loyalty Points system has no recognition of long term supporters and there are suggestions that points should be accumulated over a longer than a single season.

"Irritating that you have to get on the loyalty points early in the season or you can never catch up, so it doesn't really work for me"

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Concessionary tickets

As previously noted, there is a great deal of dissatisfaction that junior tickets are not available throughout the ground for league games. This has the effect of them being in extremely short supply for True Blue Members.

"Today for example, Leicester tickets go on sale and no family tickets are available, are they held back or have they really sold out?"

Sales Experience

- The Virtual Waiting Room is frustrating and time consuming, particularly since supporters cannot gauge where they are in the 'queue'.
- Sale of tickets for more than one game on the same day compound the Virtual Waiting Room problem.

European Games

Supporters find the arrangements for booking Club travel to European games very poor, in particular the timeliness of arrangements, even for Group Stage games. There is a perception that if arrangements for the trips were better organised and the price was lower there would be more of a take up of Club travel.

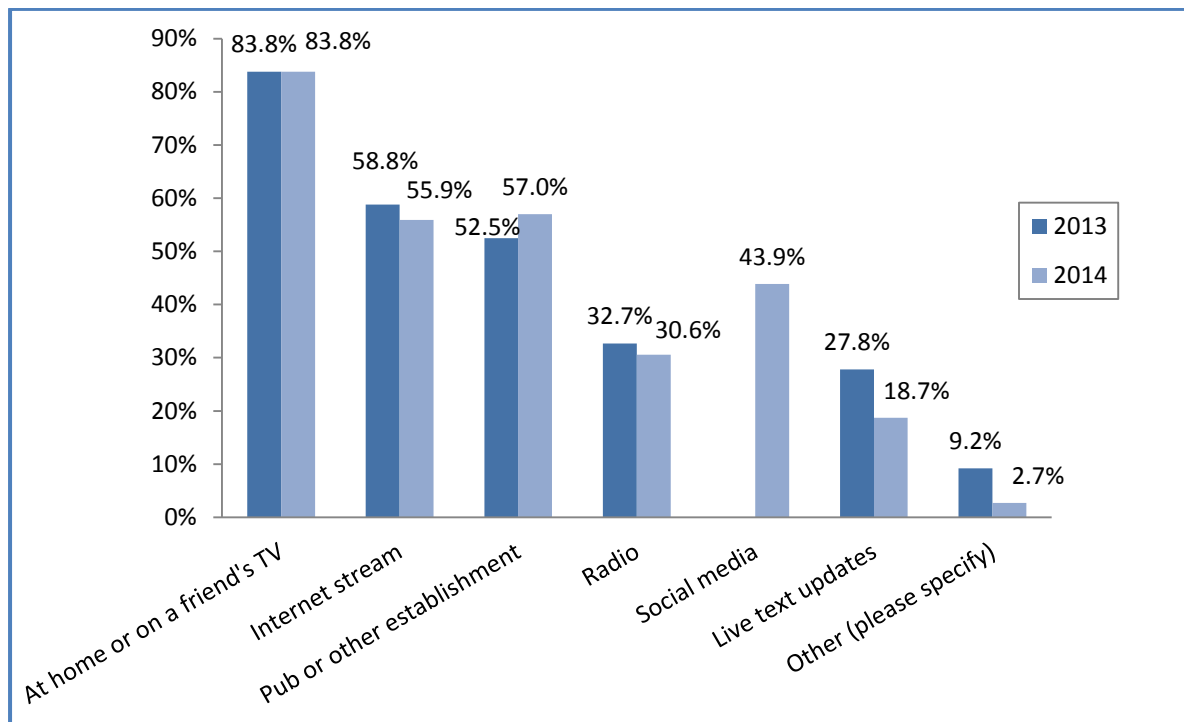
Other Issues

- Supporters continue to be concerned about the level of touting both around the ground and online. Apart from the perception that touts are depriving supporters of the opportunity to buy tickets at face value, their use of multiple memberships clogs up the sales process, meaning that supporters are even more inconvenienced by the Virtual Waiting Room.

- This is dissatisfaction among True Blue Members that even if they attend every game, only Season Ticket holders have the opportunity to purchase tickets for cup finals.

Non-matchgoing support

Members were asked how they followed games if they were not able to attend them in person:



The most predominant answer to the **Other** category was live streaming on Chelsea TV (overseas supporters). [**Social Media** category was introduced this year]

OVERSEAS SUPPORTERS

Approximately twice the number of overseas supporters took part in the survey this year. There was a mixed response from overseas Trust members with regard to availability of and access to tickets.

Respondents were asked to rate the importance of various aspects of overseas support. The higher the rating value (maximum 4) the more the importance (Don't Knows and N/As have been excluded):

	Average Rating
Access to tickets	3.32
Access to Chelsea TV	3.42
Official Overseas Support Group membership	3.43
True Blue Membership Package	3.37
Overseas tours	3.35
Merchandise	3.26

Respondents raised a number of points about issues affecting overseas supporters.

Chelsea TV

- Overseas supporters are unhappy that Chelsea TV has now been excluded from the Rest of the World True Blue membership package
- It is suggested that Chelsea TV is provided at no cost like Liverpool TV, using advertising revenue to cover costs

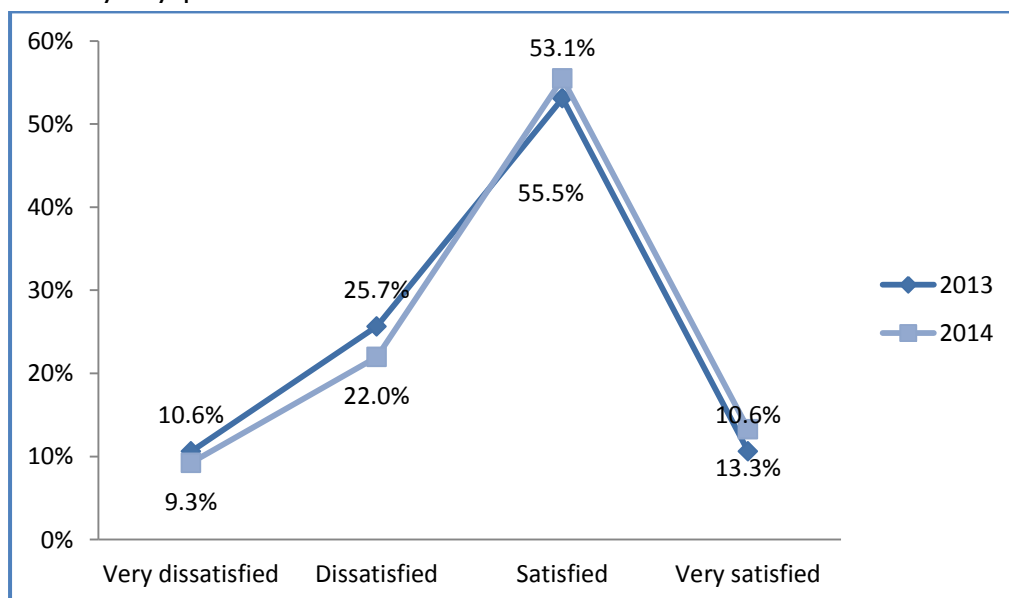
Merchandise

Respondents report that availability through the US online store is very limited

"The US store doesn't work, I buy everything on eBay."

Access to Tickets/Loyalty Points

Overseas members were asked to rate their satisfaction with access to tickets and loyalty points.

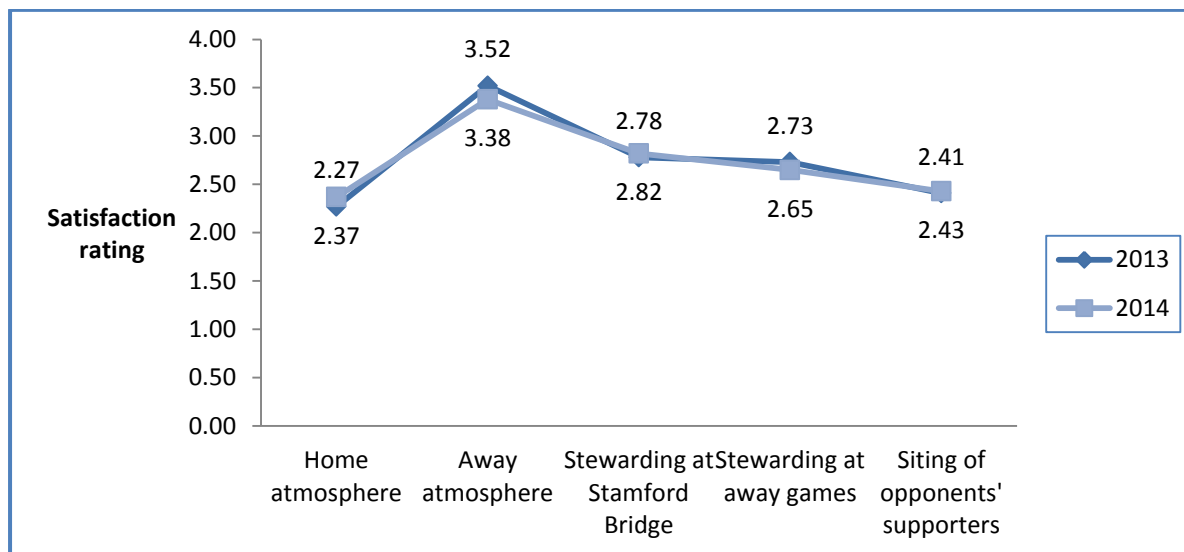


Over three quarters of respondents are satisfied with access to tickets, however the following issues were highlighted:

- Difficulty of amassing sufficient loyalty points to attend games
- Obtaining tickets for European away games, even when members of Platinum Supporters Group
- Changes to criteria for levels of official supporter clubs affecting availability of tickets, resulting in loss of True Blue memberships and difficulty in recruiting members.

ATMOSPHERE

Members were asked to rate their satisfaction with regard to the ticket pricing. The higher the rating value (maximum 4), the more the satisfaction (Not Applicable/Don't Knows have been excluded).



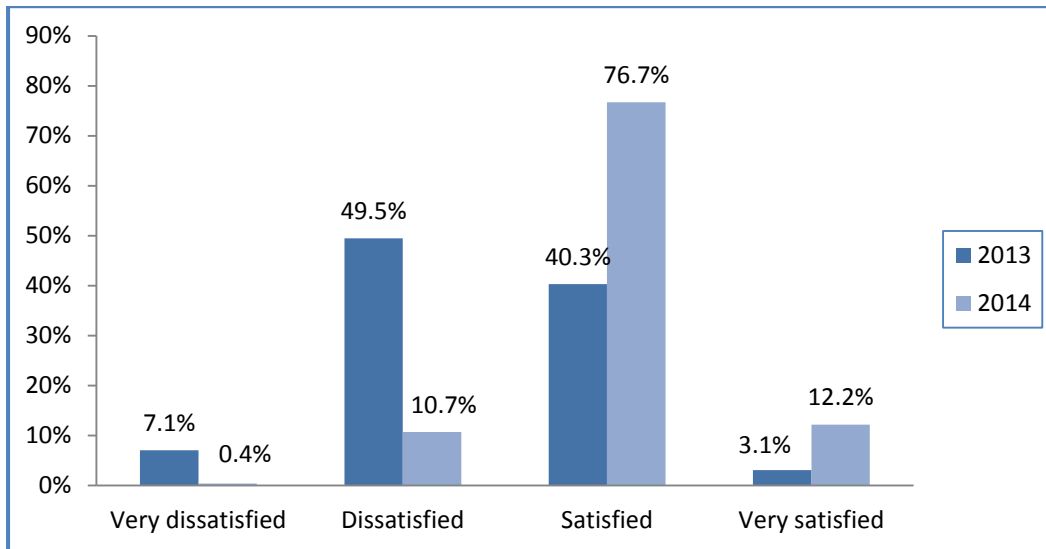
Members were invited to suggest ways in which the atmosphere at Stamford Bridge could be improved. The most popular suggestions (in order of preference) were:

- Safe standing area(s)
- Move away supporters from the Shed
- Segregating tourists from the main support and/or reducing number of tourist packages sold
- Reduction in ticket prices
- Encouraging younger support at the ground by extending the age range of youth tickets and making them available throughout the ground
- Singing section and Back to the Shed initiatives
- Stewarding
- Unallocated seating
- Improvement in pre-kickoff programme
- Acoustics

"Get the stewards to lay off those standing and singing and clamp down on troublemakers, racial abuse etc. instead."

FOOTBALL PERFORMANCE

Participants were asked how satisfied they were with Chelsea's on-field performance this season:

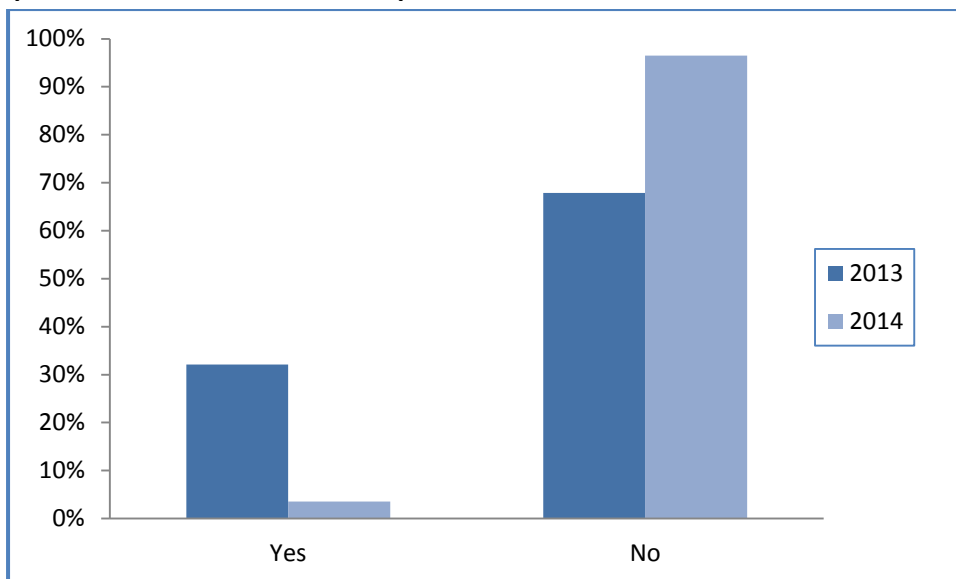


There is a marked improvement in supporters' satisfaction with the team's performance compared to last season with over 87% expressing satisfaction compared to 43% the previous season.

Doubtless this is due to a change in manager. Many acknowledge that last season was a transitional period but are frustrated by slip-ups against inferior sides.

"Jose first season back was always going to be a learning curve. Although I said satisfied overall, some performances (Villa/Palace away, Sunderland home to name a few) were unacceptable"

Respondents were asked whether their feelings about the past season had affected their decision to purchase tickets to games or renew their season ticket (N/As have been excluded):



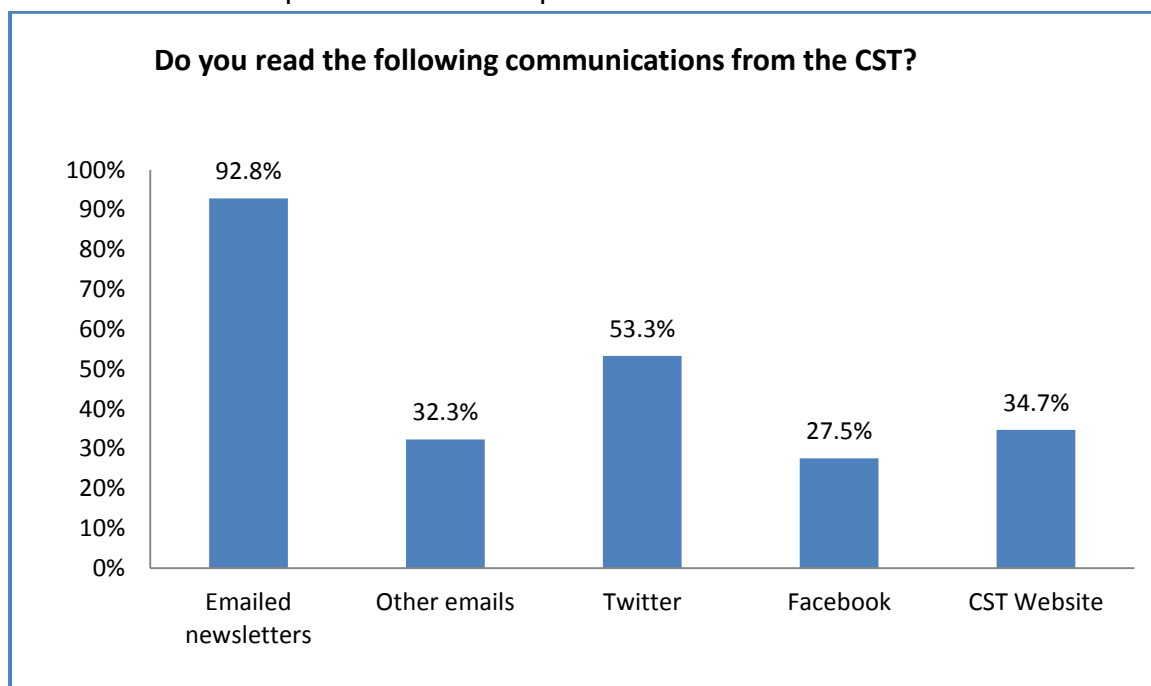
This season, only a tiny minority assert that their feelings about the season have affected decisions to purchase tickets and/or season tickets. Last season, almost a third answered Yes to this question.

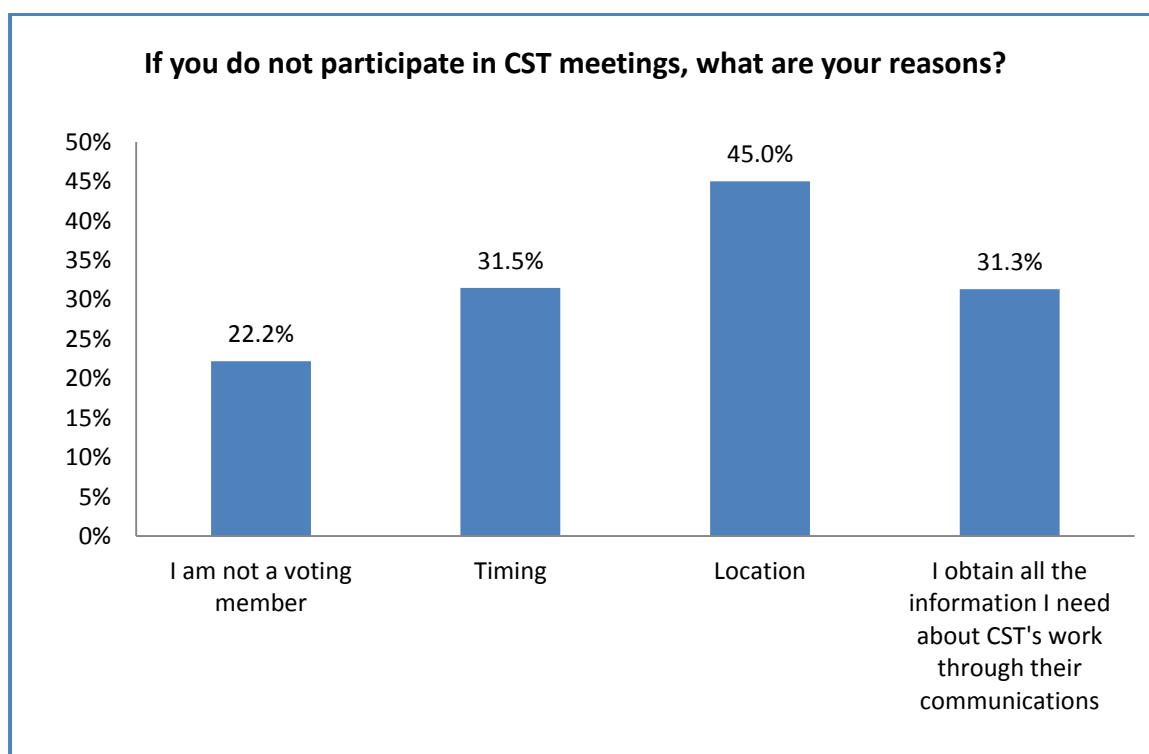
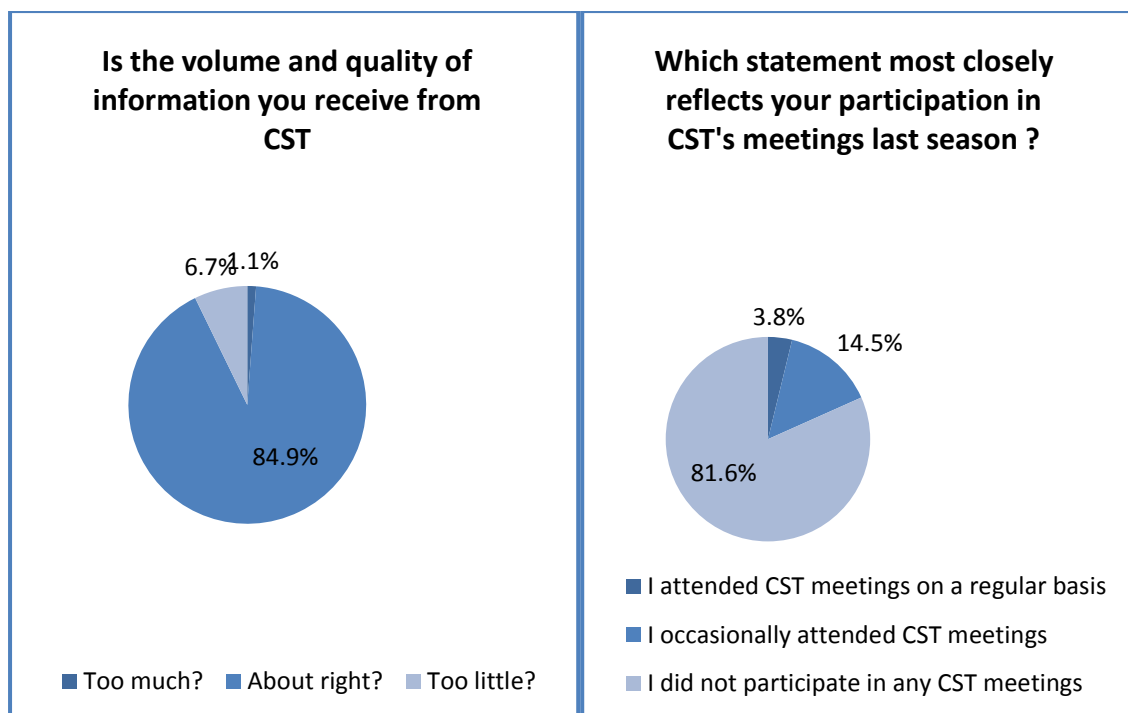
Members were asked to indicate their agreement with a series of statements concerning the on field performance and strategy. The higher the rating (maximum 5) the greater the agreement [there is no direct comparison with last year's survey as the questions have been rephrased and the rating scale has been changed]:

	Agreement Rating
I want to see a manager given time to implement a plan with the team	4.59
I want to see more players progress from the Academy to the first team	4.32
I want to see the team playing attractive and entertaining football	3.91
Winning trophies every season is the most important thing for me	3.29

CHELSEA SUPPORTERS' TRUST

One year after the foundation of the Chelsea Supporter's Trust, respondents were asked their opinions about its performance.





DEMOGRAPHICS

This section describes the demographic of the membership responding to this survey.

