



CHELSEA SUPPORTERS' TRUST 2015 MEMBERSHIP SURVEY

ABOUT THE SURVEY

This is the third annual Chelsea Supporters' Trust Membership survey. The goal of the annual survey is to identify the issues that Chelsea supporters care about. This survey was conducted from the end of the football season (25 May) and the end of June 2015. It sent out to approximately 2020 Trust members. The overall response rate was 30%.

This year a decision was taken to limit questions about ticketing and the stadium, including atmosphere, to members who attend matches. The aim of this was to reduce the number of 'not applicable' answers and make the survey simpler to fill out. This change does not appear to have made a material difference to the trends of the previous years.

SUMMARY

The quantifiable results of the survey are generally on a par with the previous year; **ticket prices** and **atmosphere** considered to be the main concerns, while approval for **Club administration** remains healthy. **Management stability** and **development of young players** continue to receive a high agreement rating.

A number of new issues were raised this year. Concerns about **access to away tickets**, the **purchase process**, **ground capacity** and **touting** have a basis in increased demand due to the team's success during the season.

The extension of the age range for **juvenile tickets**, while welcomed, has raised problems of its own. Availability of this concession is in the Family Section but very few tickets are available in this area since most is given over to season tickets. The suggestion is to make concessionary tickets available in all parts of the ground, setting a cap on numbers if necessary to minimise loss of revenue.

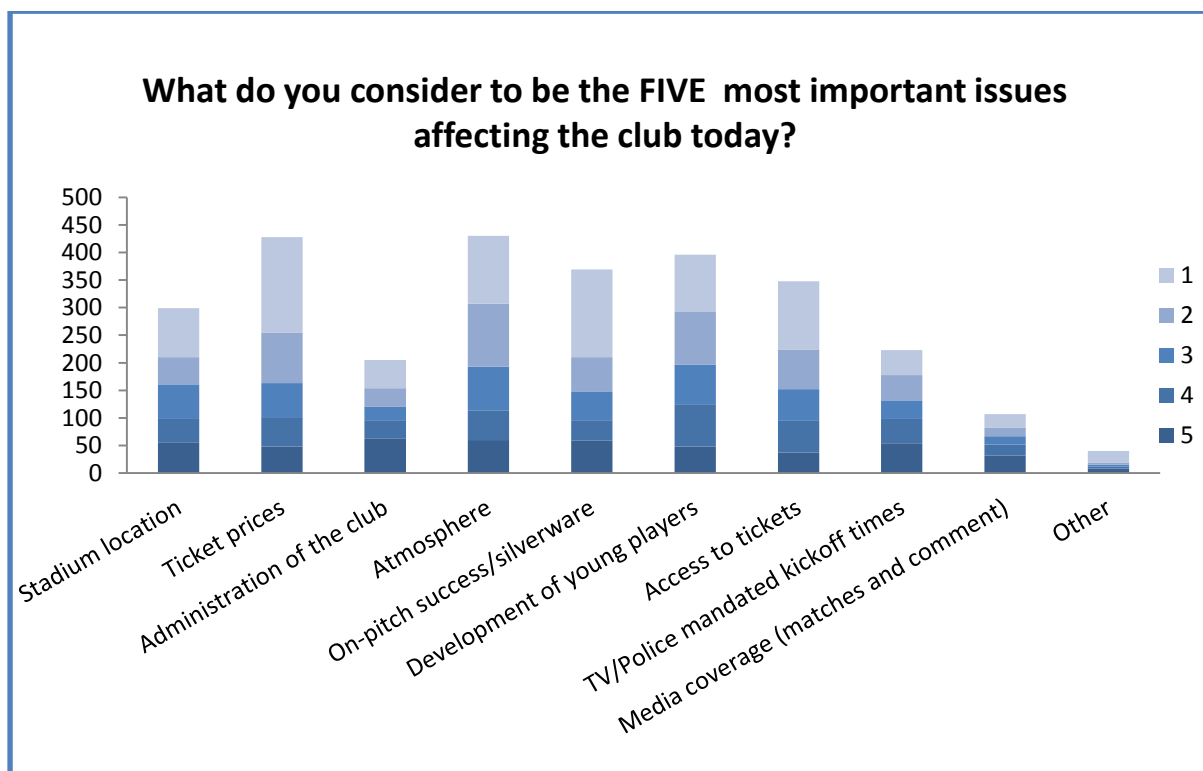
The extortionate price of some **away game tickets** is noted. **Price categorisation** has made Chelsea supporters victims of their own success with several opposition clubs charging £50 or more. Chelsea also operate this policy and this makes the cost of regular attendance at home games a problem for non-season ticket holders. The survey's respondents were enthusiastic for the Football Supporters' Federation campaign for an across the board reduction in away ticket prices.

Safe standing, relocation of away supporters and tourists and cheaper ticket prices are seen as the means to improve the **atmosphere** at Stamford Bridge. Whilst acknowledging that the Premier League TV windfall has been used well by the Club to subsidise away travel and some away tickets, the majority of participants agree that TV money should be used to reduce prices across the board.

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 **Access to tickets**, **Atmosphere** and **Development of young players**. Receiving the most votes overall were: **Atmosphere**, followed by **Ticket prices**, then **Development of young players**.



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

1. Stadium capacity
2. Overseas supporter relationship with the Club
3. Club activity in the transfer market
4. Safe standing

Ticket Prices have been the number one concern in all three of the annual surveys and the top three highest rated issues remain the same as last year. **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.

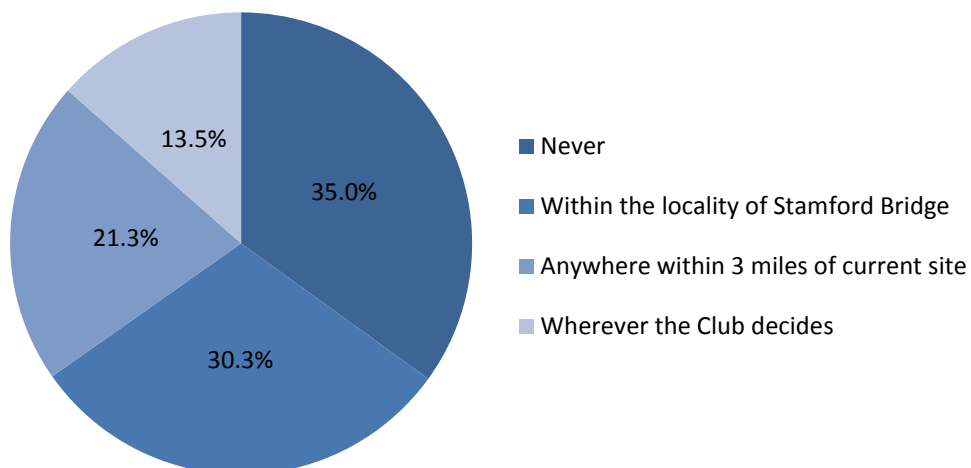
THE STADIUM

Location

The options were changed slightly from previous years following feedback from our members. 65% of respondents state that they would either consider **Never** moving from the current site or would consider moving **Within the locality of**

Stamford Bridge. This is 5% up from the last survey, but may be due to the exclusion of non-matchgoing members from this question.

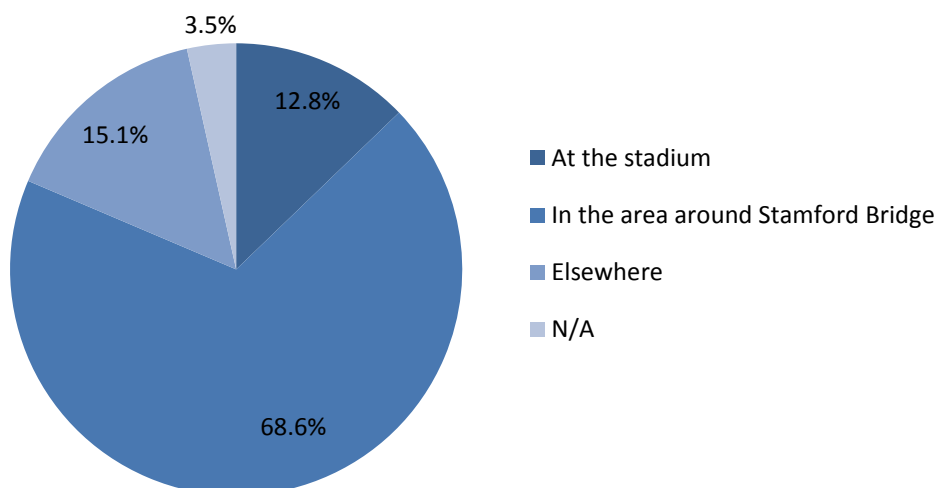
Would you consider moving from Stamford Bridge?

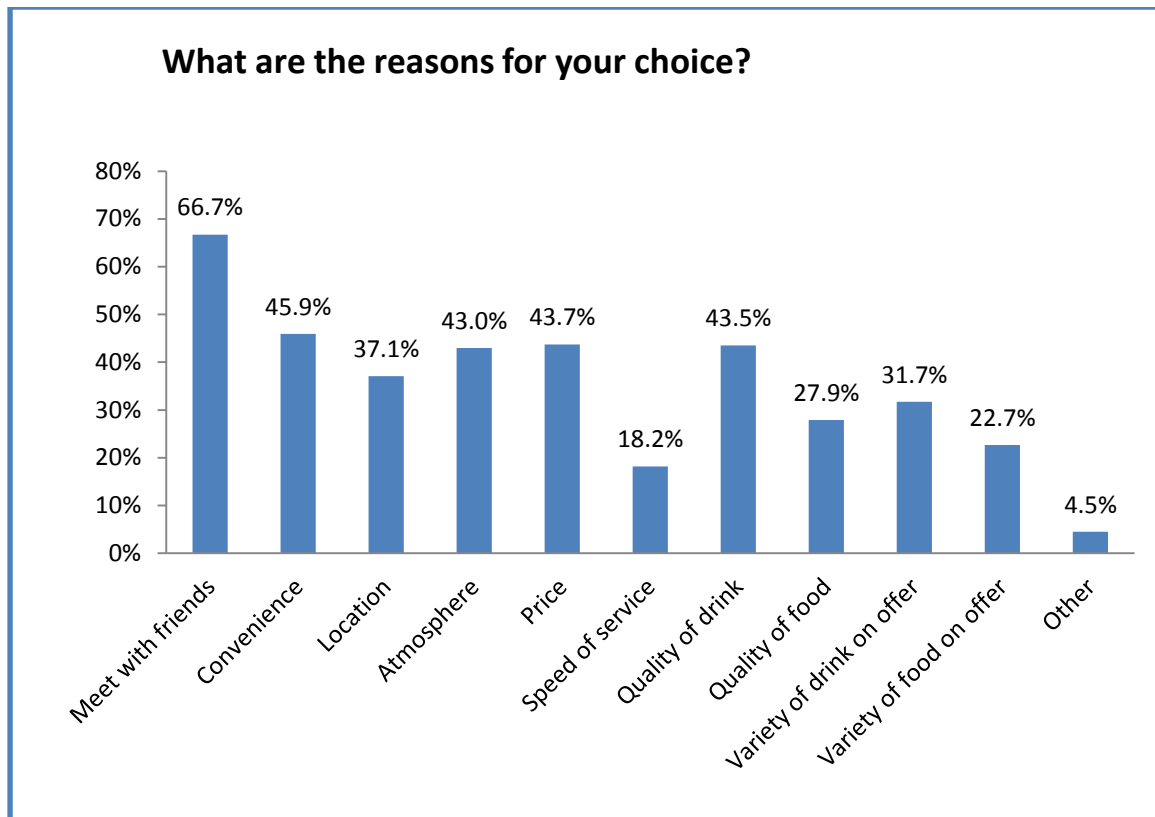


Facilities

This section has been extended this year to examine members' reasons for their choice of location for purchasing food and drink.

When attending a home game, where do you mainly purchase drinks/refreshments before the match?





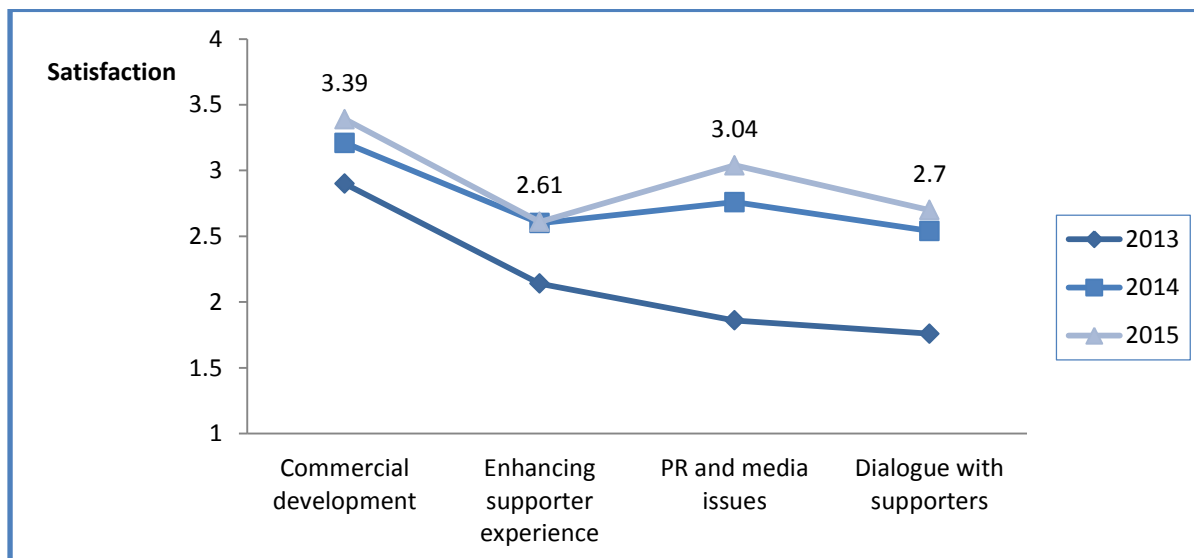
For those that answered **Other**, the main reasons given by those that choose not to avail themselves of the facilities at Stamford Bridge are the lack of variety of refreshments, the service and the quality of the beer. For those that choose the stadium, the main reason is to avoid queues at the gates. Several respondents mentioned the bars in the ground that used to be open for season ticket holders but are now only available for hospitality.

"Simple steps such as bottled beer in all stands and a cashless options to purchase would help massively."

CLUB ADMINISTRATION

Satisfaction Rating

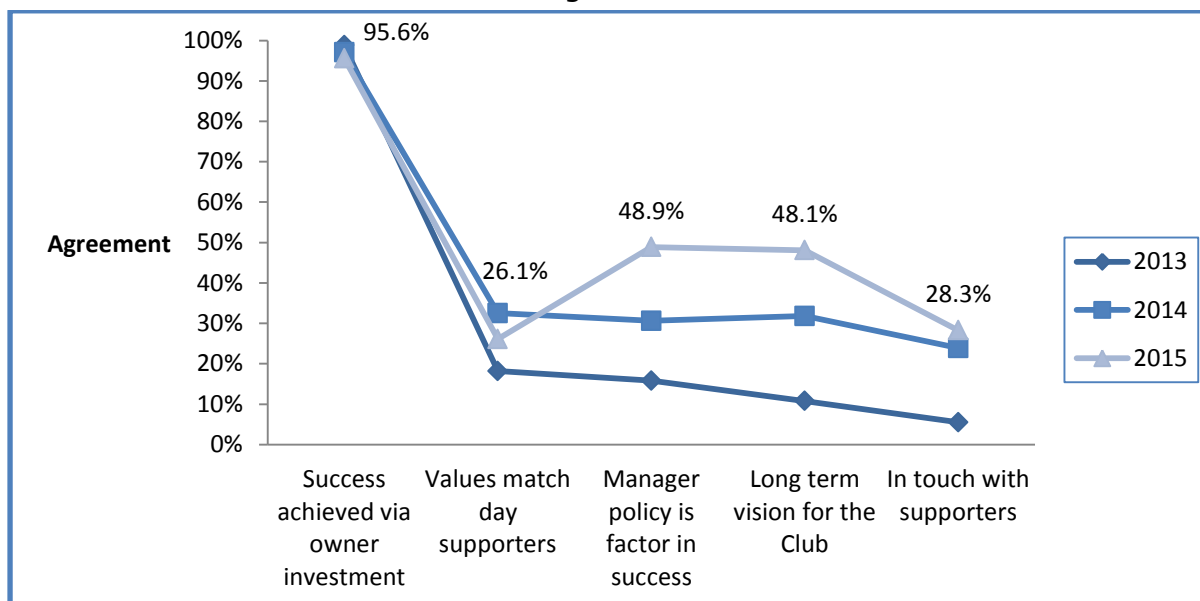
Members were asked to rate their satisfaction with the Club Board over the last 3 years in relation to a number of issues. The higher the rating value (maximum 4), the more the satisfaction (Don't Knows have been excluded):



Respondents are satisfied with the **Commercial development** and the Club's handling of **PR and media issues**, the latter being an improvement on previous surveys. **Enhancing supporter experience** rates the same as last year, while there is an improvement in **Dialogue with supporters**. The latter is up by a whole point since survey was first run.

Club Policies

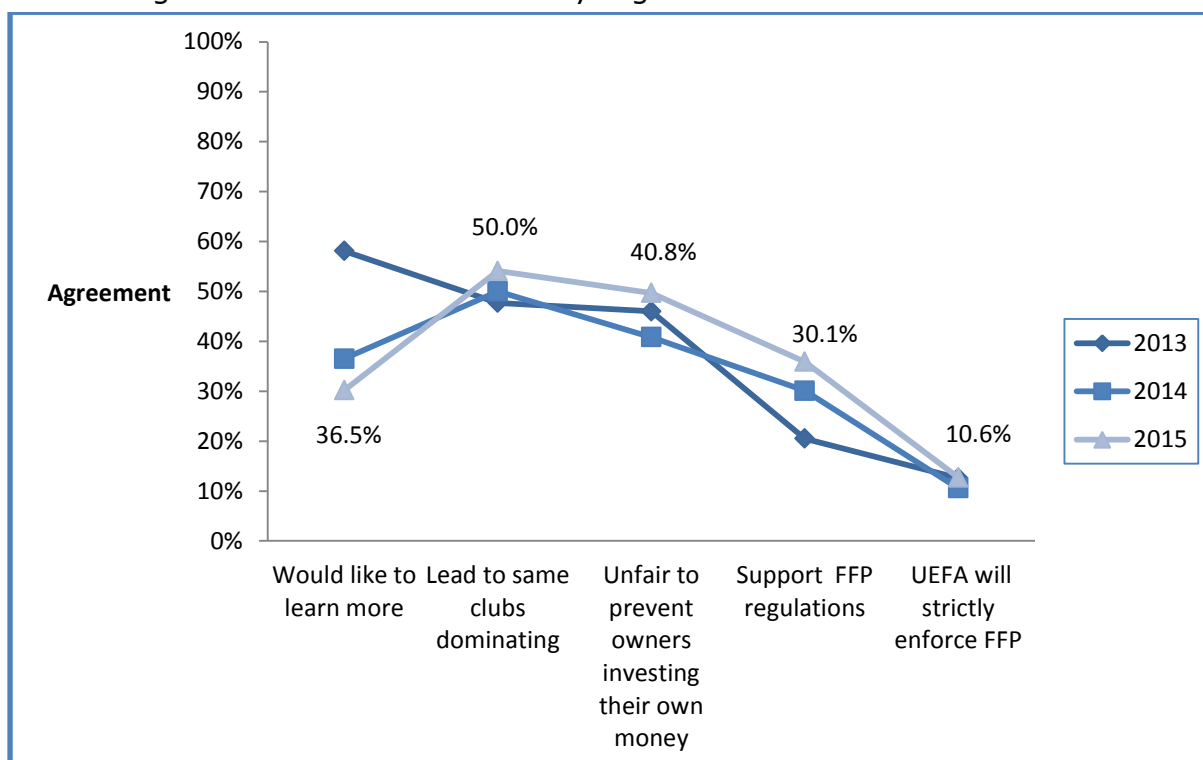
Members were asked to select their agreement with a number of statements:



- 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.
- Satisfaction with the **Club's Manager policy** and agreement that there is a well-publicised **Long term vision for the club** continue to increase
- Perception that the Club is **In touch with supporters** has risen slightly, but agreement that the Club **Values match day supporters** has decreased. It is still a minority that agree with these statements.

Financial Fair Play

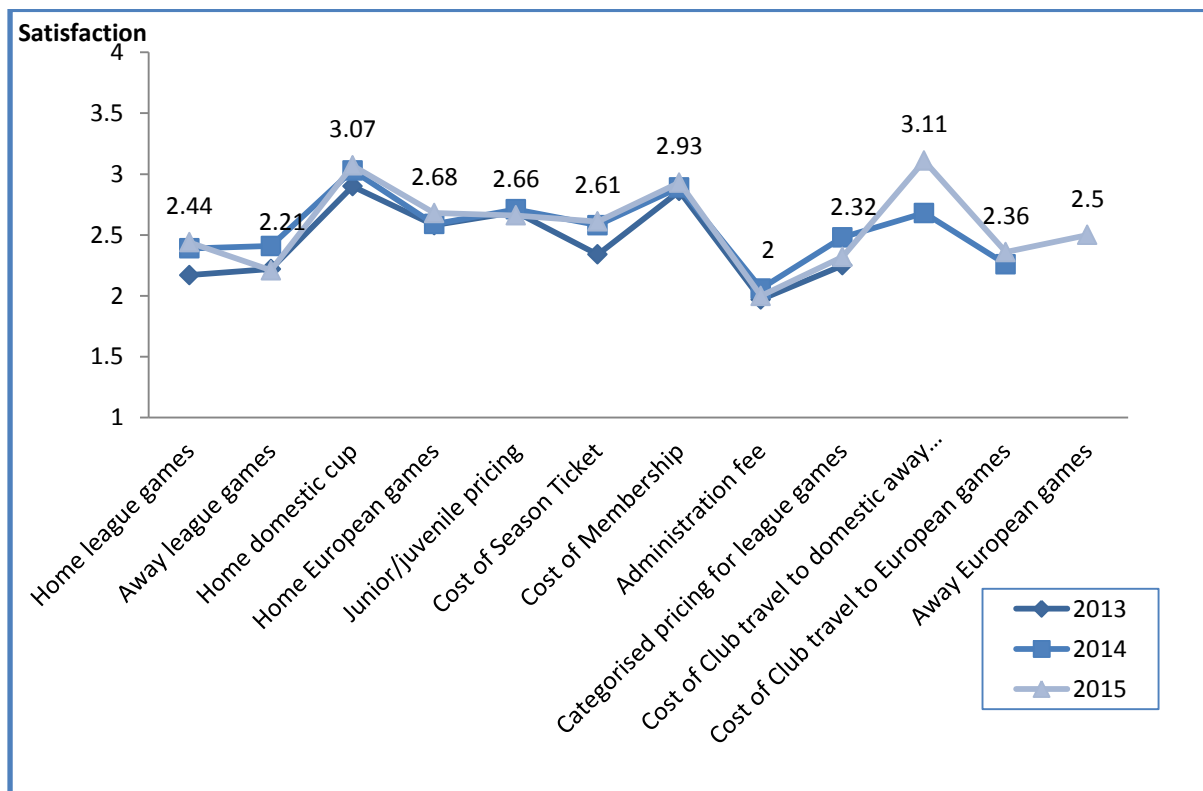
Members were asked to indicate their agreement with a series of statements concerning the UEFA Financial Fair Play regulations:



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):



Satisfaction rating with pricing remains about the same with the exception of **Club domestic travel** where, thanks to the subsidised travel provided for all matches last season, approval rating is now more than satisfied

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

Cost of League Away Tickets

There is growing dissatisfaction with the cost of some away tickets; in particular where **Matchday pricing is categorised** depending on the opposition. It is believed that it is inequitable that supporters for successful teams like Chelsea are penalised by this practice. Several respondents remarked that by indulging in tiered pricing themselves, Chelsea is encouraging this practice, disadvantaging their own supporters.

"I hope the club joins in with making away prices more affordable because that rebounds on the prices we're charged away from home (Hull category A £50-plus; category B £16!!)"

Price reduction

Despite the continued freeze on home ticket prices, the cost of tickets is prohibitive to many supporters. Many respondents note that with commercial

deals and sponsorships, including the huge TV payments, ticket prices form only a small proportion of the Club's revenue.

Concessionary tickets

With the welcome extension of junior concessions up to the age of 21 there is an

"Concessions should be available in all areas of the ground. Pensioner concessions in the Upper East are pointless because most have difficulty getting up there.

increased demand for these and other concessionary tickets to be available in all areas of the ground. It is observed by several respondents that the family section is not the place for supporters in their late teens and that it would help with atmosphere improvement for this age group to be in other parts of the ground. Seating for senior concessions is also contentious in that access is difficult. Additionally, the Club is asked to

note that female pensionable age is still 60, but concessions are not available until age 65.

European Tickets and Travel

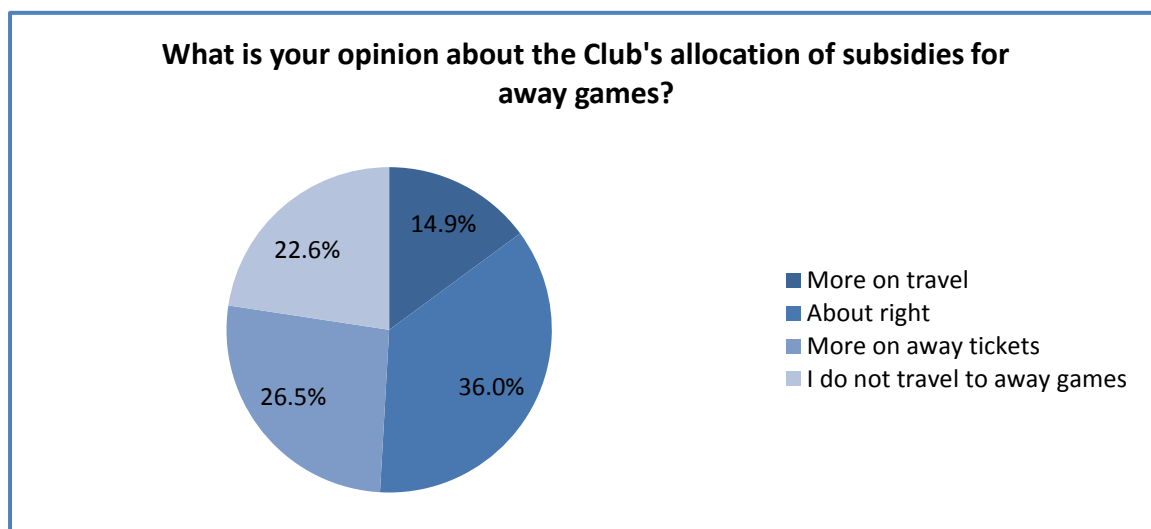
There were several comments expressing dissatisfaction with the cost of Thomas Cook European travel packages, with observations that other clubs seem able to put together lower priced packages. Respondents also remarked on the cost of tickets for the knock out stage of the Champions League.

Other Issues

- Administration charge continues to be an issue for those purchasing multiple tickets for friends and family
- Cost of categorisation – the employment of categorisation for match pricing is a particular burden for True Blue members who attend matches regularly.

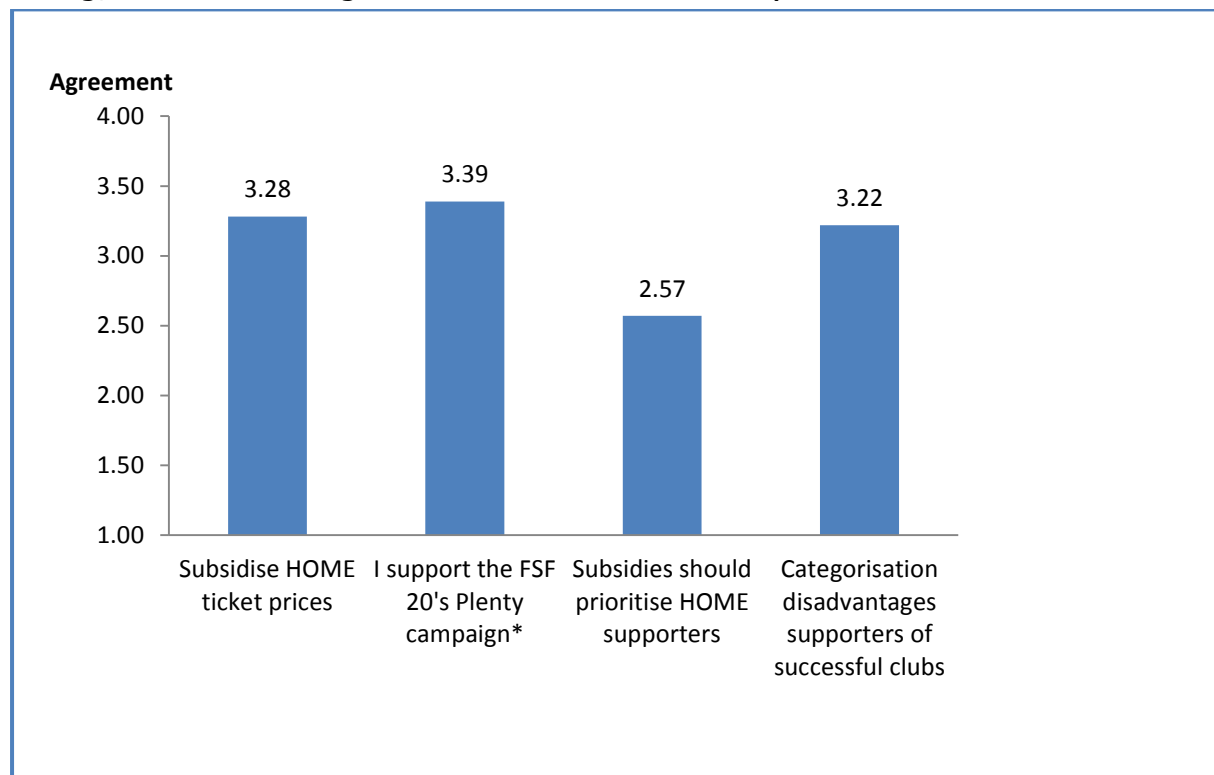
Supporter Subsidies

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



The new Premiership TV deal starting in 2016 is estimated to be around £5 billion. Survey participants were asked to indicate their opinion about ways in

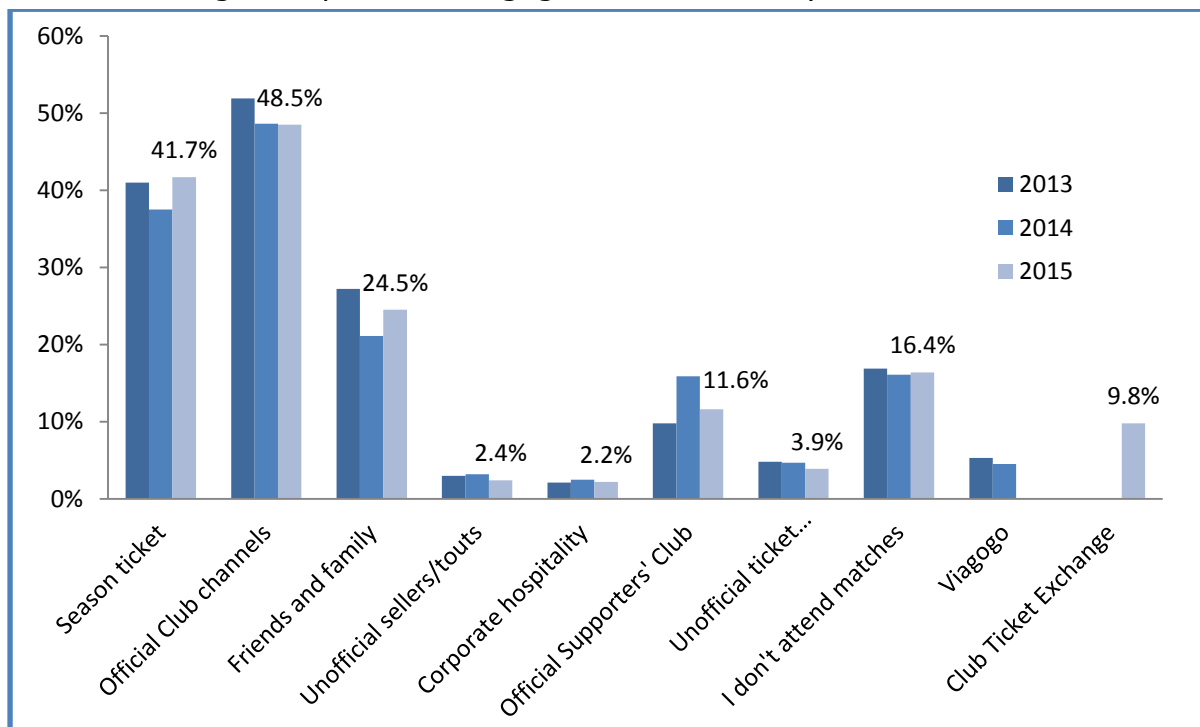
which this windfall could be used further to subsidise supporters (the higher the rating, the more the agreement with the statement).



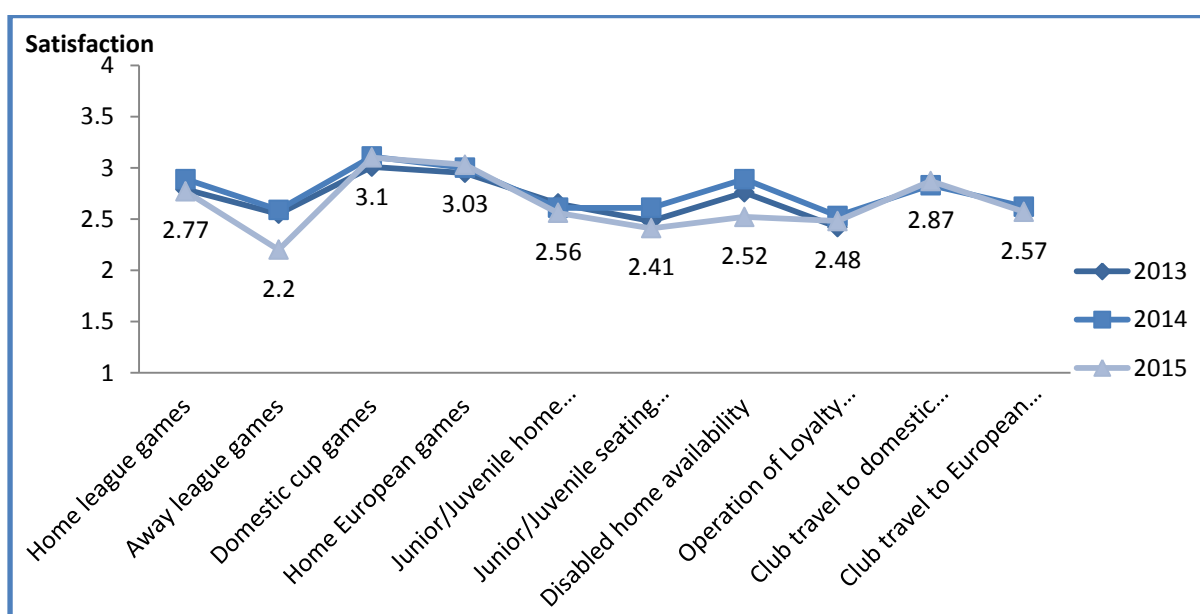
* The Football Supporters' Federation are campaigning for football clubs at all levels of the game to recognise the contribution of away supporters by getting together and agreeing an across the board price cap on away match tickets.

Access to Tickets

Members were asked how they obtained their tickets, selecting all options that applied. Just under half purchase their tickets through the club. This has barely changed from last season. More of the respondents are using the Club Official Ticket Exchange compared to Viagogo in the last two years.



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 marked drop in satisfaction from previous years for availability of **Away League tickets** and also a decrease in rating for the operation of the **Loyalty Point** system.

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

Loyalty points

This season there was a very high demand for away tickets and the operation of the loyalty point system combined with many failed attempts to purchase via the Virtual Waiting Room has been a source of frustration for many of the respondents. There is an practically unanimous request from regular away matchgoers who do not have away season tickets that loyalty points are qualified on a rolling basis, rather than starting from zero at the start of each season. The current situation means that those that miss a few matches at the start of the season are unable to purchase tickets later on and can therefore not accumulate any more loyalty points.

"Calling it a club 'loyalty' system misrepresents that it is, in reality, a lottery system."

The majority believe that the number of points awarded reflects the Club's need to shift tickets, rather than rewarding loyalty. This in turn can lead to the practice of people purchasing tickets for matches they cannot attend in order to obtain the loyalty points and then selling those tickets on at face value to fellow supporters.

Virtual Waiting Room

"[The Virtual Waiting Room] appears to be completely random instead of operating a first come first served system. Consideration should be given to making the system fairer and much more transparent."

There is common agreement that the Virtual Waiting Room is not fit for purpose. Many respondents expressed frustration with their experience of attempting to log in at the appointed time, waiting half an hour or more for a slot, only to find that by then the tickets have

all been sold out. This has a knock on effect on obtaining loyalty points. Several suggest upgrading to a system similar to Ticket Master where it is possible to see where you are in the queue.

Concessions (Juvenile and Pensioners)

As noted previously, there is a strong call for concession tickets to be made available throughout the ground. This does not just affect Juvenile tickets, adult supporters attending with friends or family of pensionable age find it impossible to obtain tickets together in the designated areas so are forced to buy full price tickets for both.

"Now that the Club has raised the age limit for juvenile tickets to 20, the Family section needs a re-think. ... over 15s are not going to want to sit with a bunch of little kids or their parents. Ideally, concession tickets should be available throughout the stadium; if loss of revenue is an issue, maybe just limit the number available."

Away Ticket Availability

Several respondents requested that a larger proportion of the away allocation is given over to season ticket holders; it is perceived that the demand among season ticket holders is higher such that ultimately, they are the least likely group of those wanting a ticket to actually

obtain one. However, there are also a few calls for members' away allocation to be increased.

Other Issues

Other issues raised included:

- Availability of Club European travel packages
- Concern regarding the European ticket collection policy for season 2015/6
- Touts – much frustration expressed by respondents in seeing so many touts in operation around Stamford Bridge when it is so difficult for official members to obtain a ticket.
- Supporters outside London do not benefit from subsidised travel

Study of Away Ticket availability

As noted above, access to tickets for away games was a particular issue last season. To provide more depth to this, the Survey asked about members' experience in obtaining tickets for away fixtures that did not require loyalty points. All results are expressed as percentages.

Fixture	Wanted to Buy	First Attempt via Box Office*	Secondary Source				
			Friends and Family	Social Media	Unofficial Exchange	Home Ticket	Tout
Burnley	37.7	50.6	12.8	2.6	2.6	5.1	0.0
Everton	36.0	55.7	16.1	0.0	3.2	0.0	6.5
Sunderland	25.4	49.2	11.1	0.0	0.0	0.0	3.7
Newcastle	35.7	47.8	19.4	5.6	2.8	2.8	2.8
Stoke	40.9	52.9	8.3	2.8	2.8	2.8	2.8
Southampton	59.9	25.9	16.3	9.3	2.3	2.3	3.5
Swansea	30.0	36.1	25.6	0.0	0.0	0.0	7.7
Aston Villa	52.6	38.1	24.6	1.8	0.0	1.8	3.5
Hull	31.8	44.3	10.3	5.1	0.0	2.6	0.0
Leicester	57.3	46.0	25.8	4.8	0.0	1.6	8.1

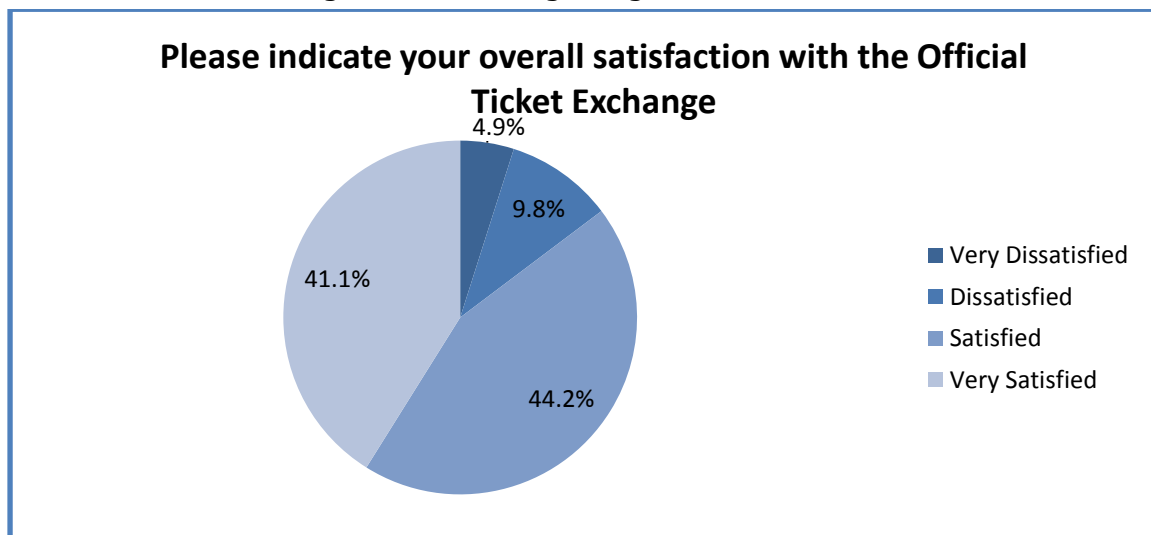
* Excludes Away Season Ticket holders who are guaranteed tickets

Unsurprisingly, the highest demand for tickets is for fixtures that are easily accessible from London.

Although there will always be people who cannot use their tickets because of fixture changes or work and family commitments, these results do seem to bear out concerns expressed by some respondents to the survey that some people buy tickets with the main intention of selling them on. In three cases around **a quarter of tickets were acquired as spares** from people known to the purchaser (**Swansea, Villa and Leicester**). For these three fixtures, the percentage of tickets purchased through secondary sources is roughly in parity with the number that were sold through the Box Office. In the case of **Southampton, more tickets were sold via secondary sources (33.7%)** than through the Box Office. It is worth noting that, based on the evidence of comments in the survey, the majority of secondary tickets are only ever sold on at face value.

Official Ticket Exchange

The Club ticket exchange has been in operation for a season. **14.7%** of respondents have used the exchange to **sell** a ticket to a match that they were unable to attend, and **15.4%** used the exchange to **purchase** a ticket. Of those that used the exchange there is a high degree of satisfaction.

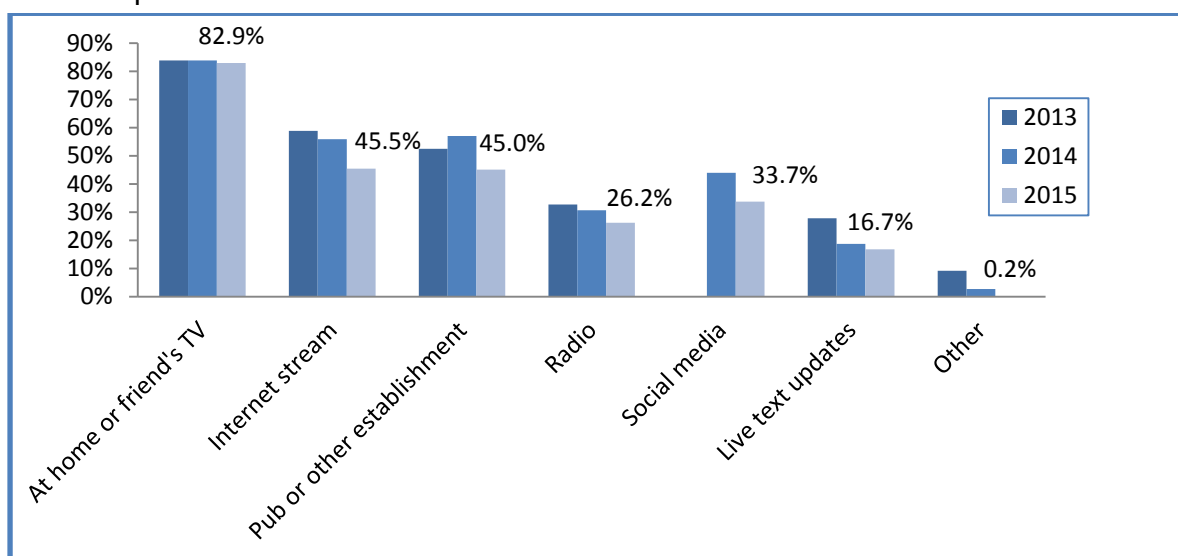


Respondents were asked to comment about their experience using the exchange the majority of their remarks were that it was a very welcome improvement over Viagogo. There are some suggestions for improvement:

- Ability to purchase adjacent seats (more than one ticket)
- Workaround to enable adult plus child seat in East Lower; also cannot buy single adult seat in Family Section
- Club should work to improve awareness of this facility which would also help with the issues of availability that were raised
- Extend to sell other ticket types

Non-matchgoing support

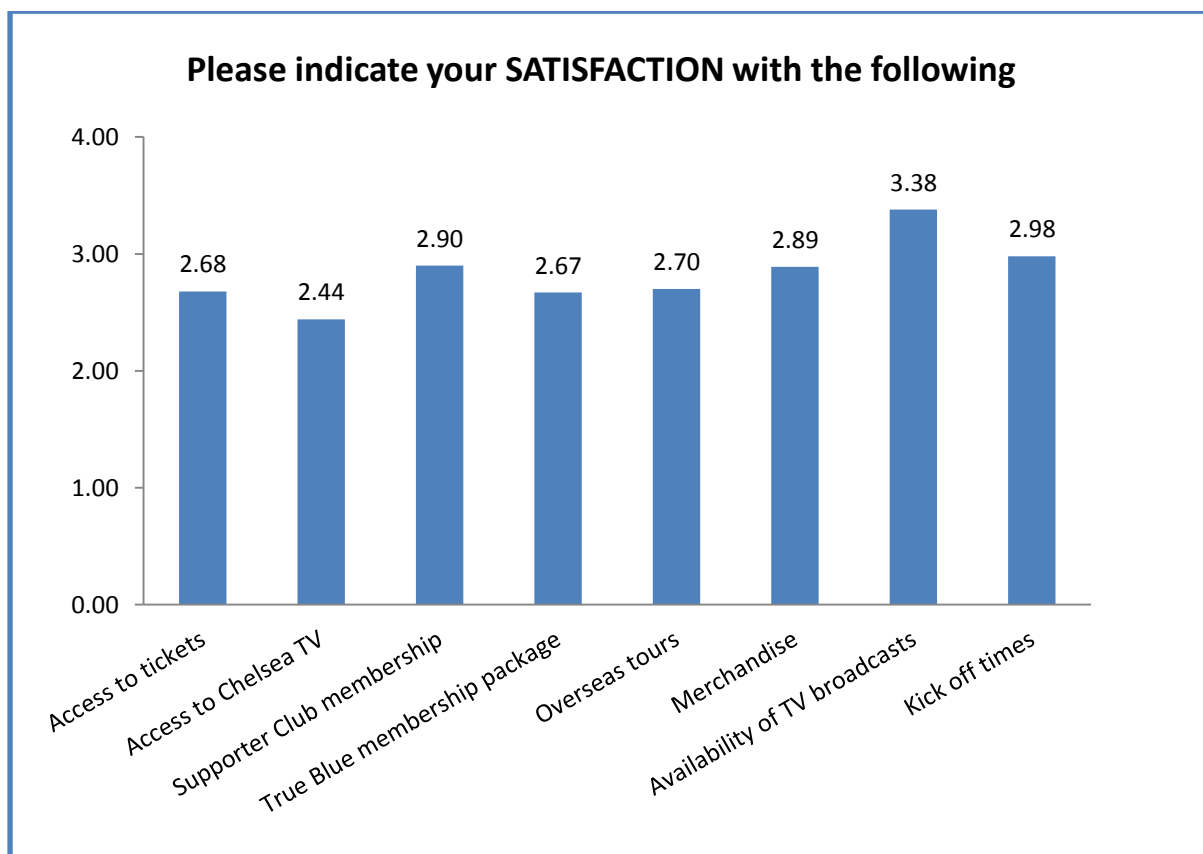
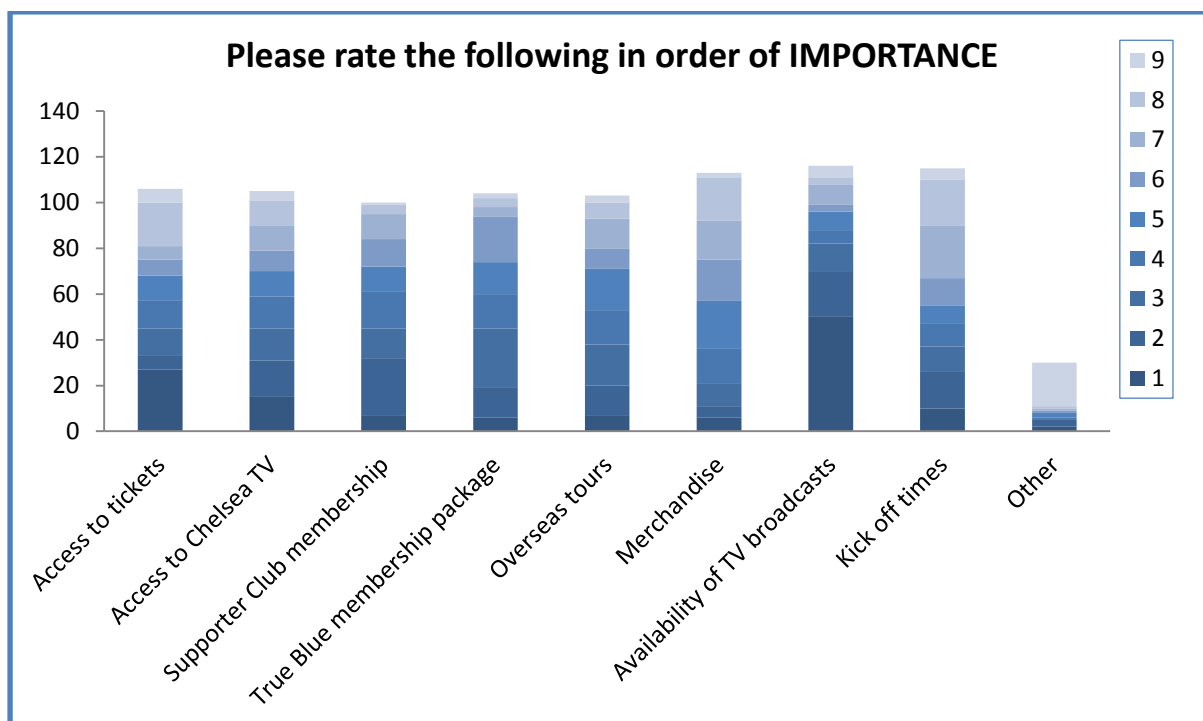
Members were asked how they followed games if they were not able to attend them in person:



There was only one valid answer for **Other** which was that respondent received texts from a friend.

OVERSEAS SUPPORTERS

Questions for overseas supporters were changed for this survey in order to rank and compare both importance and satisfaction with aspects that are unique to their situation.



Availability of TV broadcasts of Chelsea games was ranked first in importance the most number of times and also has the highest number of votes. This is also the item with which overseas supporters are most satisfied.

Kick off times and merchandise also received a high number of overall votes for importance. The second highest importance is given to Access to Tickets.

Availability of merchandise is an issue with supporters in North America with Canadian supporters being required to pay import duty on goods purchased via the US site and the US site carrying a limited choice of stock. Supporters in Africa would just like to be able to buy some Chelsea merchandise.

There is dissatisfaction with the True Blue membership package available to

"We can't be expected to purchase a TrueBlue membership for every friend and relative in our lives in the Fall without knowing who might be traveling with us in the next year"

overseas supporters and the application of the loyalty points system to acquire tickets to 'big' games. It appears that those overseas supporters able to travel to games at Stamford Bridge would prefer membership and loyalty points to be tailored to take account of the cost and distance of their travel. The point is made that in order to obtain sufficient loyalty points, overseas members are purchasing cheaper tickets such

as those for League Cup ties with no intention of using them.

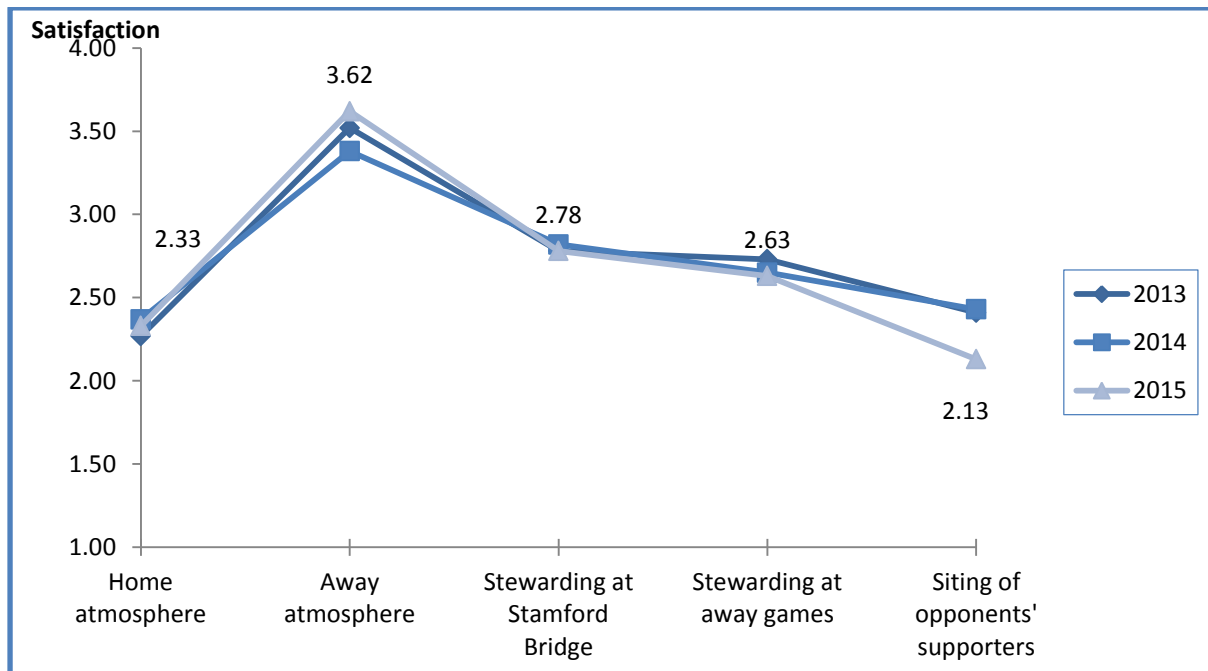
Although Official Supporter Club membership does not rank highly in **Importance**, there is dissatisfaction with the manner in which the Club Official Supporter Club policy has changed in recent years.

There are requests for pre-season tours in South Africa and Canada.

"... understand that the average member of a supporters club is probably closer to a UK member, than someone on Facebook or Twitter, I am so tired of [the Club] talking to us like we are utter idiots about our club!!!!"

ATMOSPHERE

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



There is no significant change from previous surveys, apart from increased dissatisfaction this year with the **siting of away supporters**.

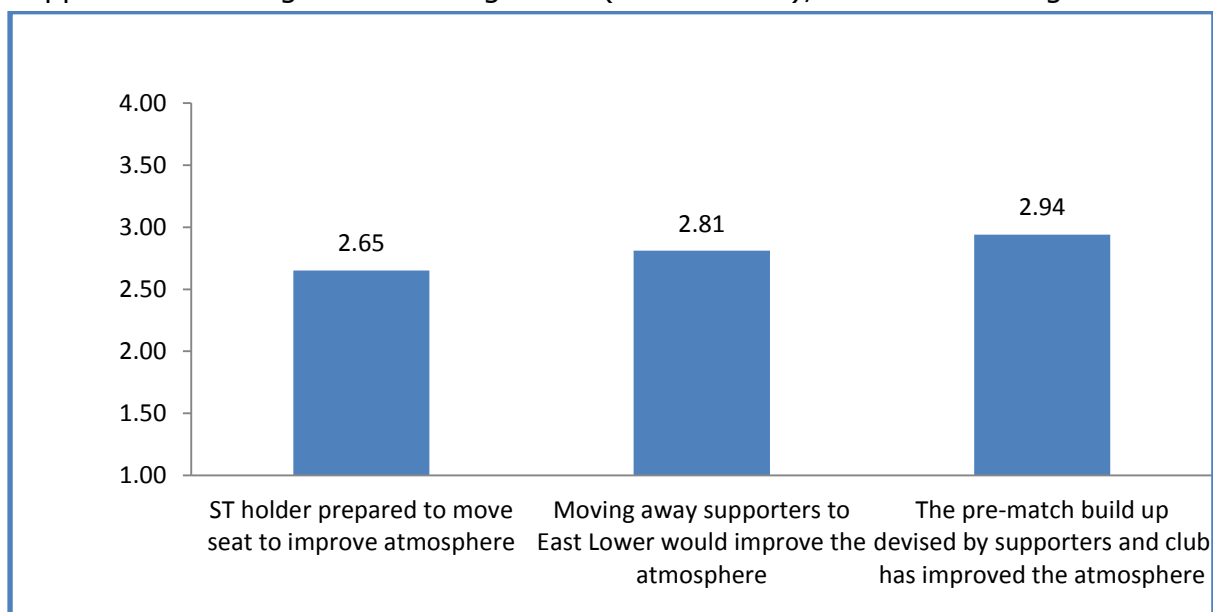
Members were invited to suggest ways in which the atmosphere at Stamford Bridge could be improved. The most popular suggestions (in order of preference) were:

- Safe standing area(s)
- Move away supporters from the Shed
- Singing/'ultra' areas
- Reduction in ticket prices
- Encouraging younger support at the ground by extending the areas in which juvenile seats can be purchased
- Segregating tourists from the main support and/or reducing number of tourist packages sold
- Stewarding
- Unallocated seating
- Improvement in pre-kickoff programme
- Ground redevelopment

"It's football not the London Eye or Eiffel Tower"

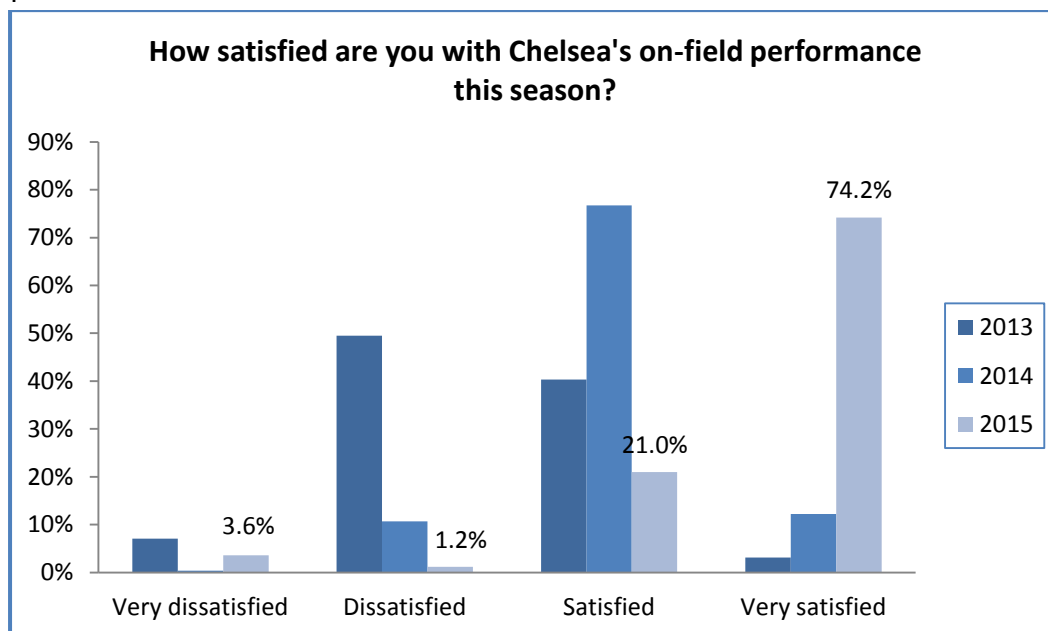
"The case for either Standing areas, singing areas and unreserved seating is now irresistible. One or all of these options must be tried to improve the atmosphere"

Based on the suggestions given in previous surveys, respondents were asked to indicate their agreement to a series of statements in order to ascertain the extent to which atmosphere initiatives would be accommodated or noticed by supporters. The higher the rating value (maximum 4), the more the agreement.



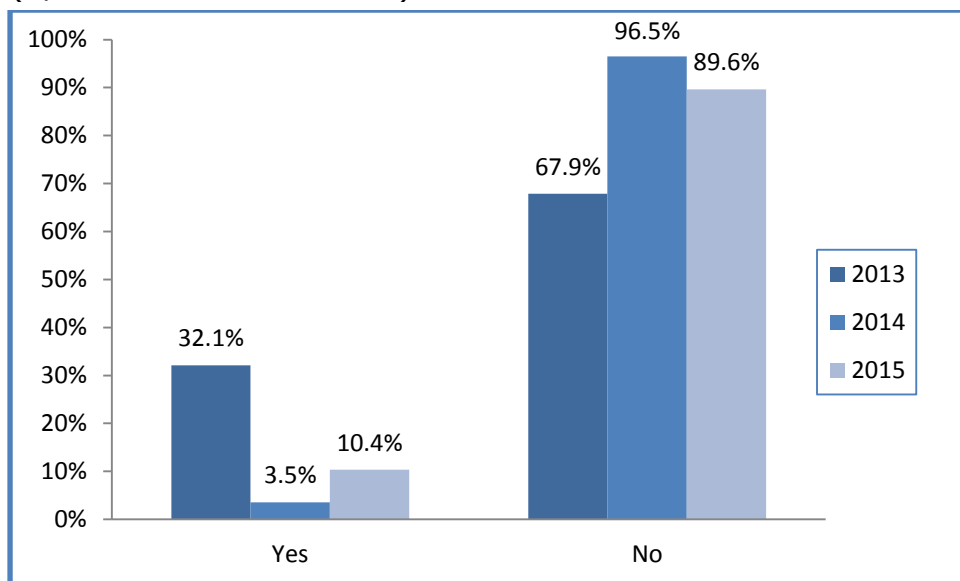
FOOTBALL PERFORMANCE

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



After winning the Double, unsurprisingly there is a huge majority that are very satisfied with the team's performance. However, some do express their disappointment with our early exits from the FA Cup and Champions League knock outs. Many remarked how much they enjoyed the attacking style of play at the start of the season, but also noted that it became negative in the second half and winning games appeared to be a struggle.

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):



In 2013, almost a third answered Yes to this question.

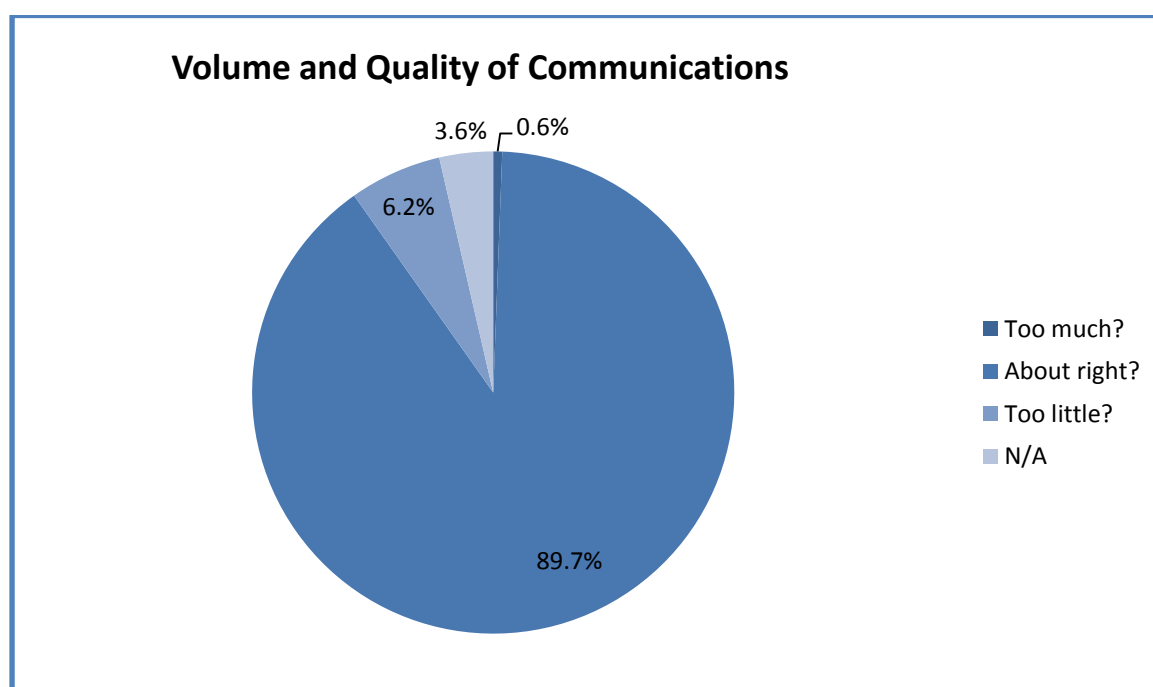
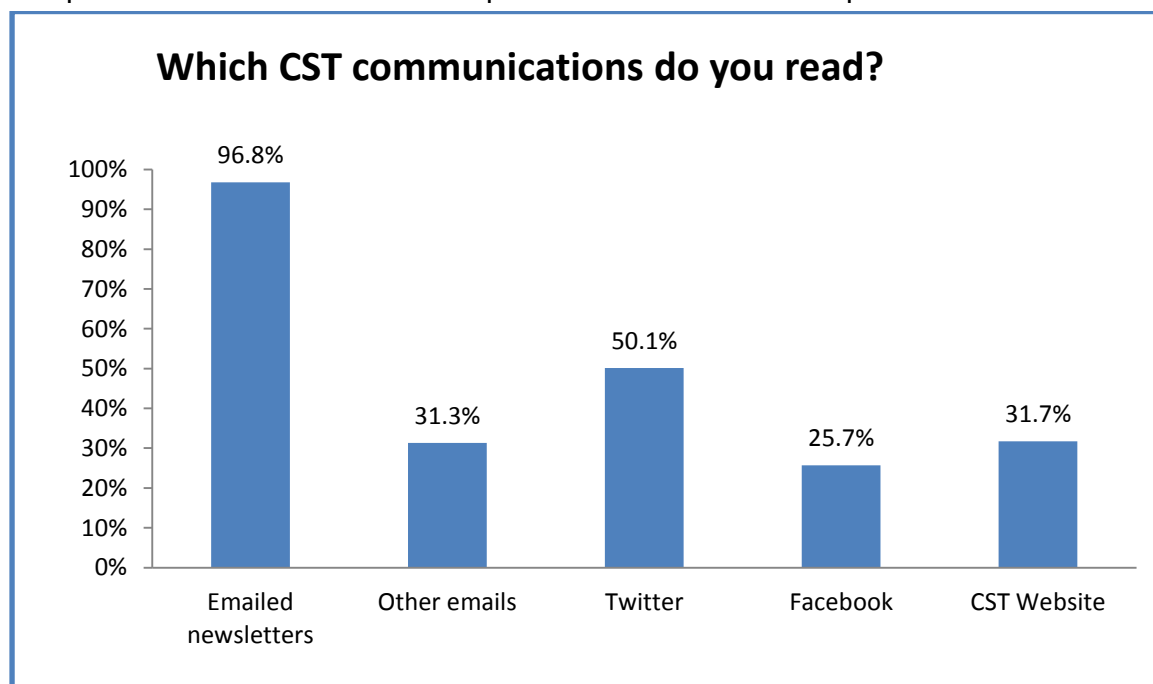
Members were asked to indicate their agreement with a series of statements concerning the on field performance and strategy. The higher the rating (maximum 5) the greater the agreement [there is no direct comparison with last year's survey as the questions have been rephrased and the rating scale has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

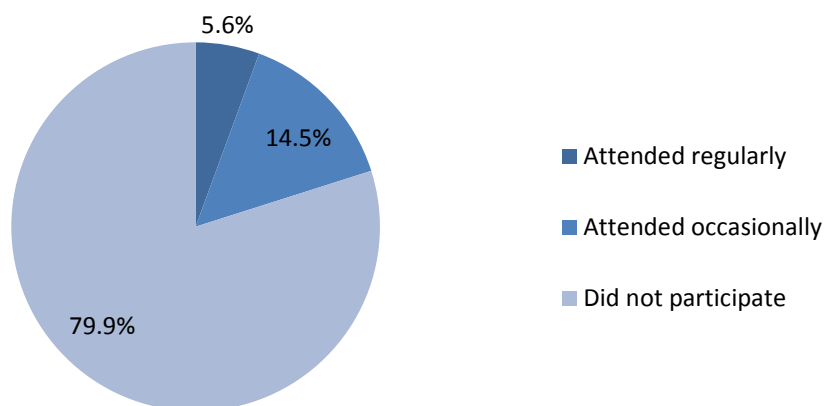
Management stability and **progressing home grown players** through to the first team are seen as more important than attractive football and consistently winning silverware.

CHELSEA SUPPORTERS' TRUST

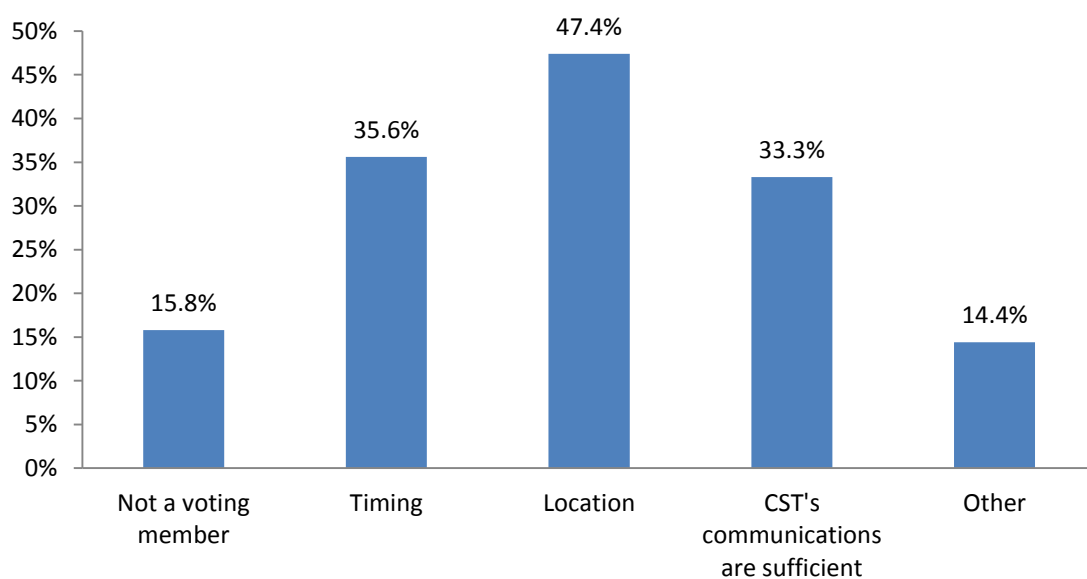
Respondents were asked their opinions about the CST's performance.



CST Meeting Participation



Reasons for non participation



The main **Other** reasons for non-participation in meetings are:

- Match day attendance did not coincide with meeting
- Member is a carer or has an illness
- Member goes to matches with their children

DEMOGRAPHICS

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

