



## CHELSEA SUPPORTERS' TRUST 2016 MEMBERSHIP SURVEY

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### ABOUT THE SURVEY

This is the fourth 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 (16 May) to mid-June 2016. It was sent out to both the voting and non-voting membership. The overall response rate was 25%, with a 44% response rate from Voting Members. A section about the potential temporary stadium move ahead of the new stadium development was included this year, to provide information about Supporter concerns regarding this issue. Some questions have been slightly reformulated to provide more consistent data and a question about Supporter Liaison has also been introduced.

### SUMMARY

The results of the summary inevitably reflect the relatively unsuccessful 2015/16 season. For the first time, **ticket prices** and **atmosphere**, although still ranked highly, have been superseded by concerns about on-pitch success and related categories of **youth player development**, **transfer policy** and **management stability**.

Despite the on-pitch difficulties, satisfaction with **Club administration** is only slightly down on last year. It is disappointing to note that only 20% of respondents were aware of the **Supporter Liaison Officer** role at the Club and less than 5% knew his name or how to contact him.

CST members welcome the **Away Ticket Cap** agreed by the Premier League and over 60% said that they would now attend more away games. However concern was expressed that it would be even more difficult to obtain these tickets. Home ticket prices are still considered to be too high. Availability and location of **juvenile tickets** remain key concerns with regard to **pricing**, **access** and **atmosphere** and there continues to be a demand for a **price category for young adults**.

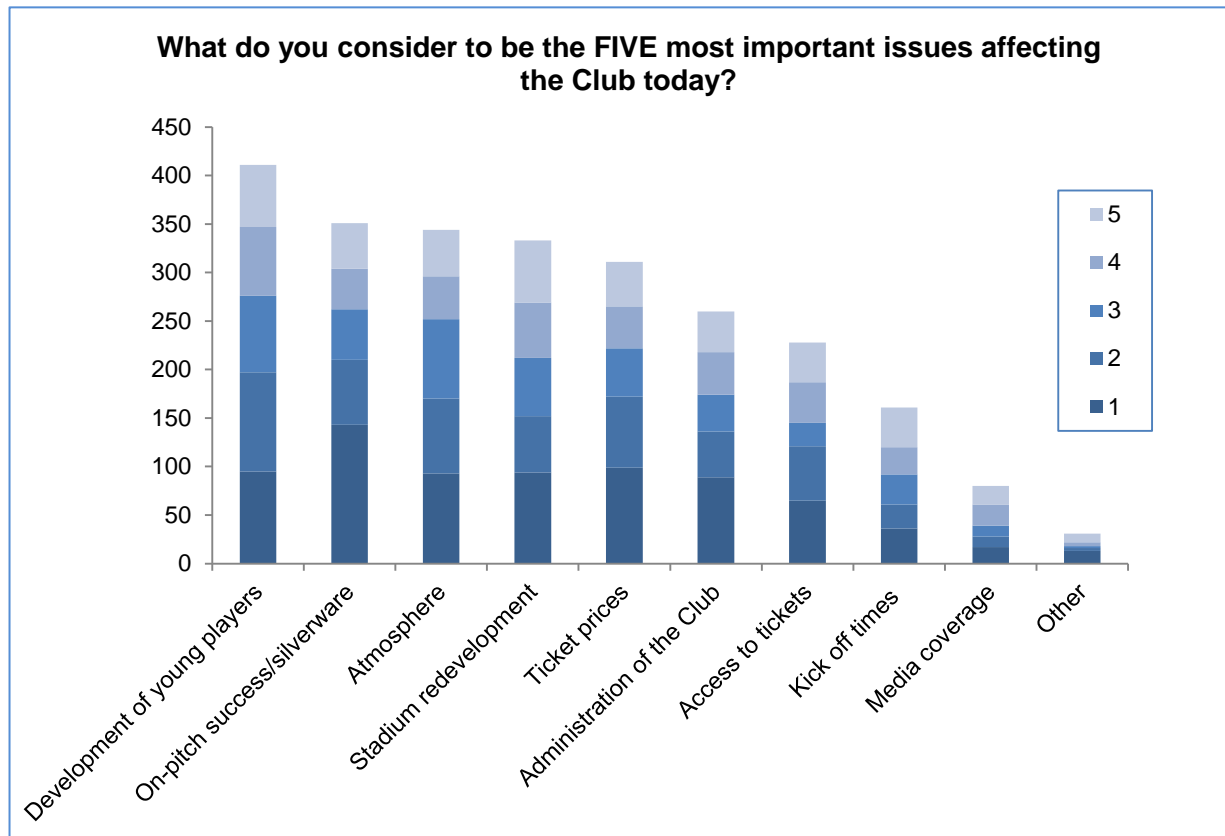
Although a move to a **temporary stadium** in any of the venues currently touted will not materially affect weekend attendance, most respondents consider that time and/or cost of travel will increase significantly. The primary opinion is that the Club should ensure that pricing takes account of this. There is a strong possibility that attendance of midweek games will be affected, particularly if the move is to Stratford.

About a quarter of respondents stated that the new European ticket collection arrangements were a factor in not attending away Champions League games. Although most agreed that the Club made the collection location convenient, the majority stated that the process ate into time for pre-match activities.

## KEY ISSUES

Respondents 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 **On-pitch success**, followed by some distance by **Ticket prices**, **Stadium redevelopment** and **Atmosphere**. Receiving the most votes overall were: **Development of young players**, followed by **On-pitch success**, **Atmosphere** and **Stadium redevelopment**.



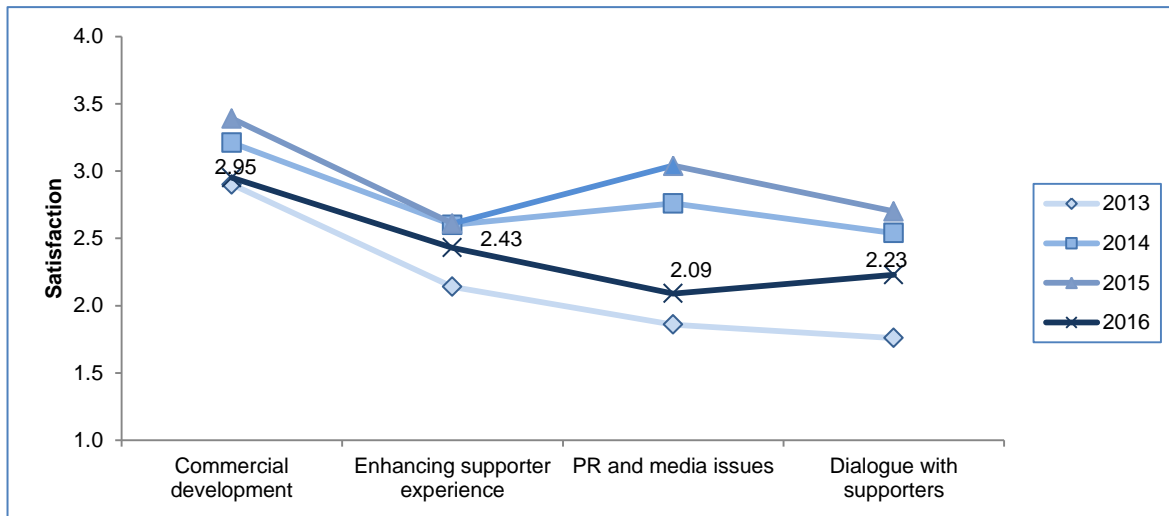
Amongst **Other** issues raised by respondents, the most significant were:

- Transfer Policy
- Team Management Stability
- Club Management
- Touting & Ticketing

**Ticket Prices** have been the number one concern in the last three of the annual surveys but, although this is still important, this has been overtaken by **On-pitch success**. **Stadium redevelopment** replaced Stadium relocation from previous surveys and features in the top four for both highest importance and votes overall.

## CLUB ADMINISTRATION

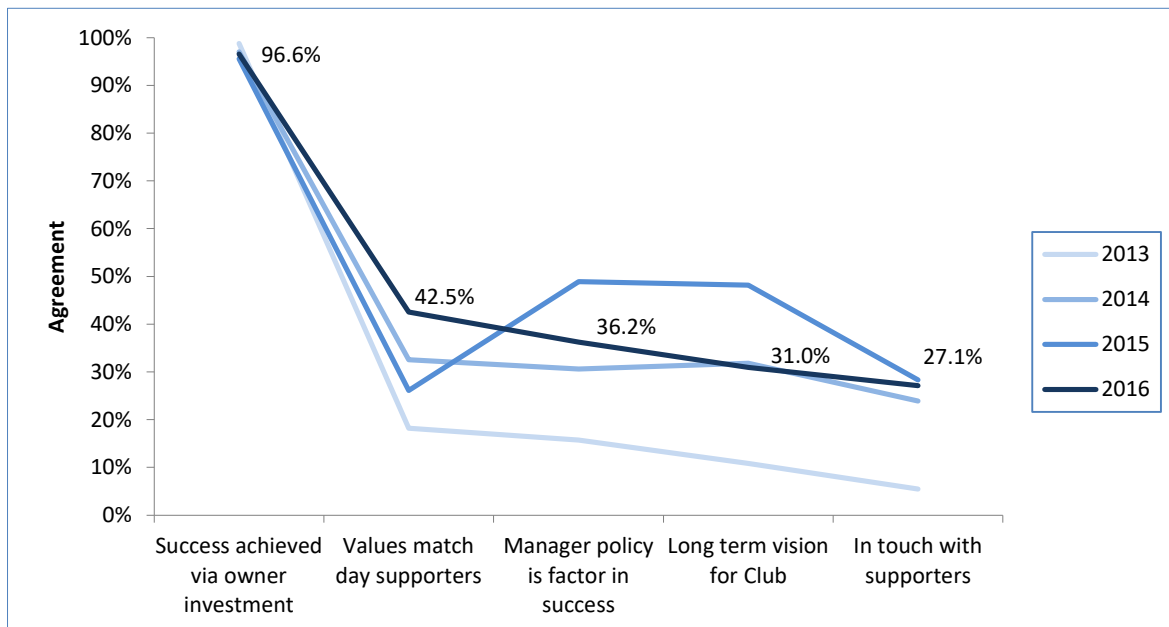
Respondents have been asked to rate their satisfaction with the Club Board over the last 4 years in relation to a number of issues; the higher the rating value (maximum 4), the greater the level of satisfaction.



Clearly the responses have correlated with the lack of on-field success this year, with all factors dropping significantly although remaining above the levels expressed in 2013. Unsurprisingly in a year that saw considerable turmoil on and off the pitch, the handling of **PR and media issues** fared particularly poorly.

## Club Policies

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

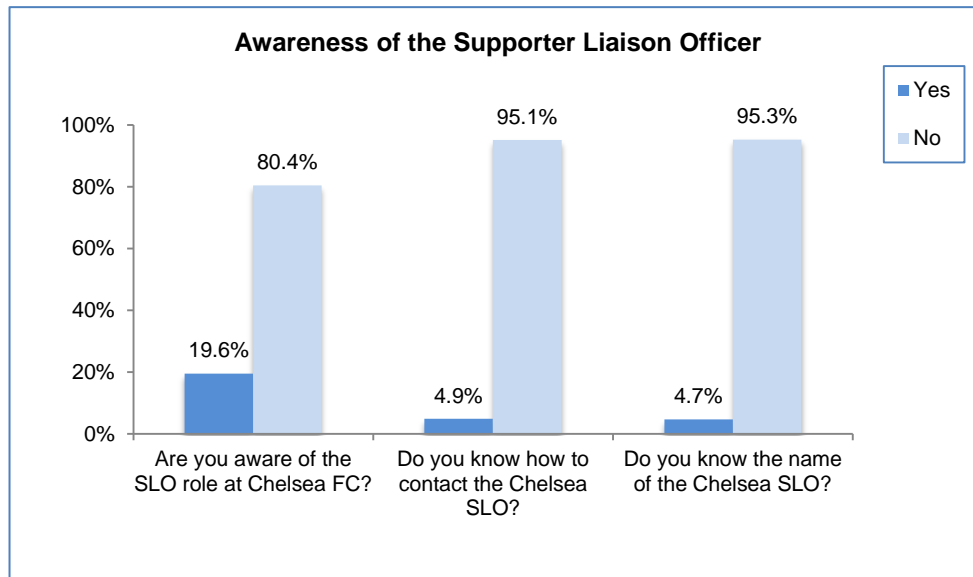


- The **investment of the owner** continues to be recognised as a key factor in the club's recent success, as has been the case every year.
- Unsurprisingly given the events of the 2015/16 season, satisfaction with the **Club's Manager policy** and agreement that there is a well-publicised **Long-term vision** for the club have fallen considerably this year.

- Perception that the Club is **In touch with supporters** is unchanged, but agreement that the Club **Values match day supporters** has increased considerably, the latter exceeding 40% for the first time since the survey began.

## SUPPORTER LIAISON OFFICER

Respondents were asked to indicate their awareness of the role and identity of the Club's appointed Supporter Liaison Officer (SLO).

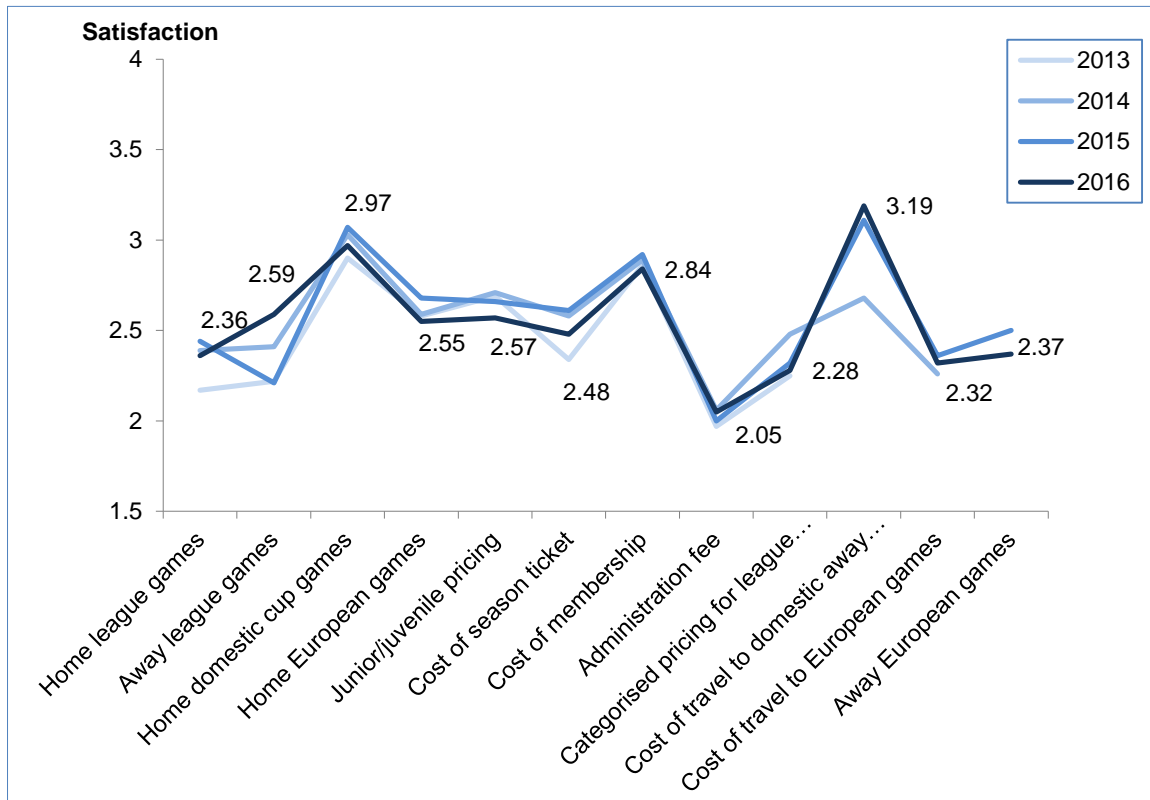


Given that by definition the SLO is a club employee responsible for building bridges between the club and its fans, it is disappointing to see that only a fifth of respondents are aware of the role, and under 5% know his name or how to get in touch with him.

## TICKETING

### Ticket Prices

Respondents were asked to rate their satisfaction with regard to the pricing of match tickets. The rating value ranges between 1 (Very Dissatisfied) to 4 (Very Satisfied):



Satisfaction levels remain broadly the same as last year, with a notable rise in the approval rating for **Away league games**, presumably in anticipation of the capped prices from the 2016/17 season. A drop in the ratings was noted for the various categories relating to **home match ticket prices**, which may be due in part to the poorer performance of the team last season, but also the increase in the cost of **home domestic cup ties**.

Respondents were also asked to provide their comments on ticket pricing and a number of themes were evident:

### *Pricing of Home Games*

Despite the welcome freezing of PL prices at Stamford Bridge, the most common complaint amongst the respondents was that the cost of attending games remains a significant barrier to many supporters.

"It is disappointing that the huge windfall from TV revenue has not led to a reduction in ticket prices at Chelsea and other clubs"

"The £30 away cap next season is a great idea and it should be applied to ALL ticket prices including home too"

Many referred to the increase in revenues across the Premier League from the new TV deals, and felt that more should be done to lower the cost of attending matches given this leap in income to the Club. There is also a widespread feeling that all fans should benefit from reduced prices, not just away supporters.

### *Younger Supporters*

A significant number of responses made the case for encouraging younger fans into the ground, to establish the bedrock of support for the future and to improve the atmosphere in the ground.

Suggestions included lowering prices; additional concession bands (e.g. students, under 25s); and making junior/youth tickets available throughout the ground for PL games.

"Junior tickets should be available in all parts of the stadium as this encourages and enables more people to bring children/ grandchildren to games. These are the supporters of the future."

A number of respondents also drew a direct link between the lack of younger fans in the ground and problems generating an atmosphere.

### *European Games*

Thomas Cook were again criticised for both the price of their offerings and the lack of options, whilst several people explicitly complained about the price of PSG tickets.

### *Cost and Availability of Away Tickets*

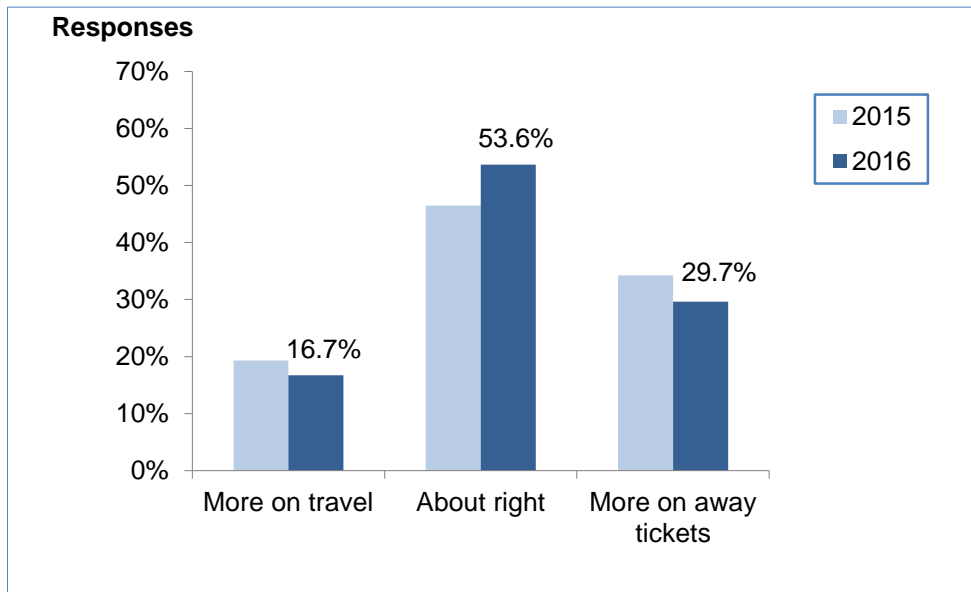
Opinion was divided on the new £30 cap, and whilst it was largely welcomed or seen as a step in the right direction, a few felt that it discriminated against home fans. Concerns were also raised about access to away tickets becoming harder.

### *Other Issues*

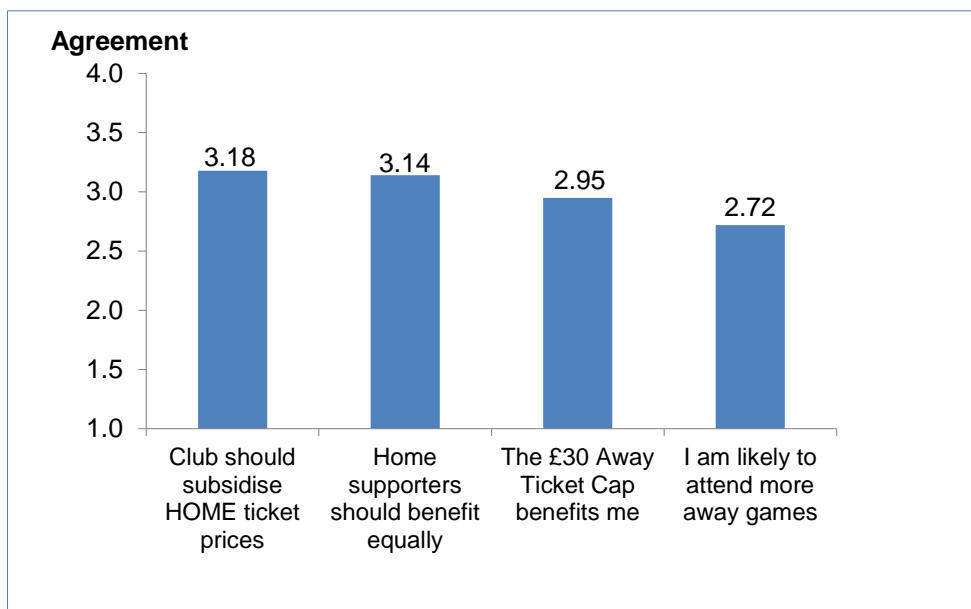
- The 'per ticket' administration fee is still a source of irritation.
- The inclusion in a home season ticket of a number of cup-ties either free or at nominal cost was suggested.

## Supporter Subsidies

The survey also asked respondents 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.



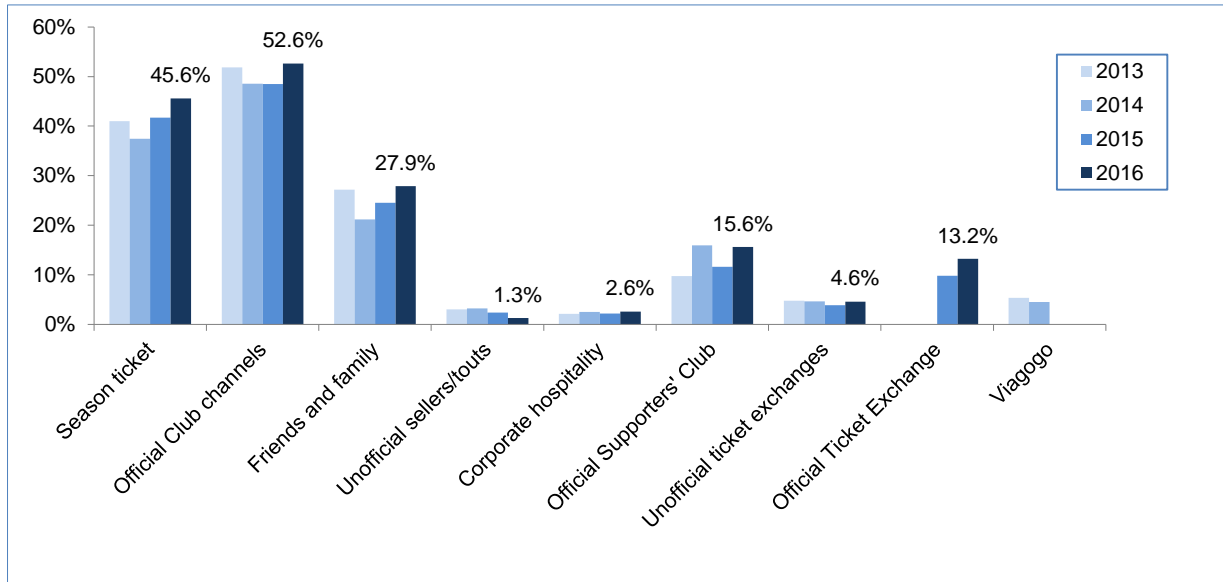
This year, more than half of the respondents feel the club is getting the balance between ticket price subsidies and travel provision/subsidies **about right**. We also asked for the level of agreement with a number of statements relating to the Away Ticket Cap:



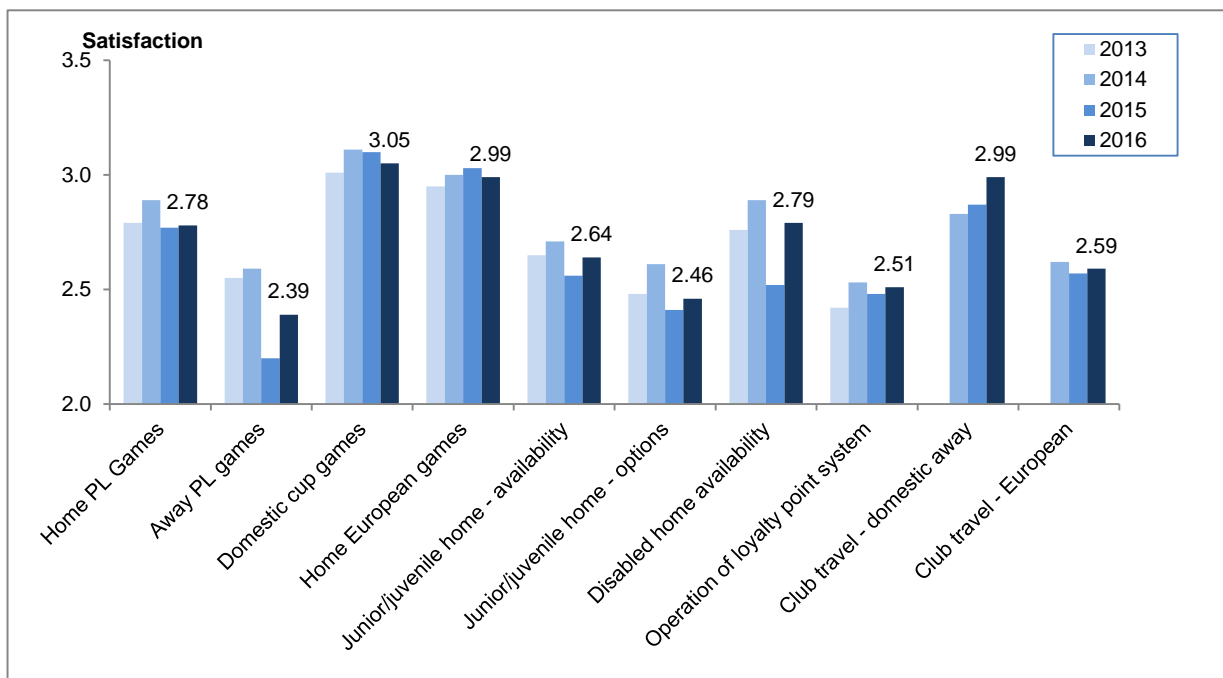
Again there is a trend emerging that, whilst people welcome the Away Ticket Cap and hope to take advantage of it, more should be done to help home supporters as well as or instead of travelling fans.

## Access to Tickets

Respondents were asked how they obtained their tickets, selecting all options that applied. Just over half purchase their tickets through the club, whilst the number accessing through season tickets is 45.6%. The Official Ticket Exchange has grown and usage far exceeds that of Viagogo in the last two years of their contract.



Respondents were again asked to rate their satisfaction with regard to acquiring tickets; the range of values is 1 (Very Dissatisfied) to 4 (Very Satisfied).



The satisfaction with availability of **Away League Tickets** increased last season, possibly as a result of the disappointing on-field performance, though it is reasonable to assume that dissatisfaction will be increased by the Away Ticket Price Cap. Satisfaction with the availability of **disabled seating** improved markedly. .



The efforts by the Club to arrange and/or subsidise travel to games outside London has had a clear impact on satisfaction with the **Club Travel for Domestic Games**, and has clearly been appreciated by travelling fans.

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

### *Loyalty Points & Away Games*

Once more the subject of loyalty points was to the fore, with the difficulty in getting hold of tickets to away games a regular complaint, an issue that is likely to become more evident this year. A repeated view was that season ticket holders should always have priority access to tickets, whilst others commented that they were struggling to get tickets to any away games with more than one observing that the away allocations are just too low for the demand.

"Members should under no circumstances get access to away tickets ahead of season ticket holders."

"Loyalty points are a joke. Miss out on first game or two due to that comedy virtual waiting room and suddenly you don't have enough points for match 3, 4, or 5!"

The problems of playing catch-up if unable to get tickets early in the season were highlighted, and it has been suggested that some form of rolling points system would help to alleviate the 'early season syndrome'. More than one person felt that Loyalty Points should be used for every game, whilst one person observed that some tickets should be held back for every game to be sold regardless of LPs.

It was also mentioned by some respondents that it was not fair that they did not receive Loyalty Points when buying tickets through the Official Ticket Exchange.

There was however one respondent who summed up the debate perfectly...

"Loyalty point debate will never be solved"

### *Virtual Waiting Room*

The Virtual Waiting Room and ticket buying experience itself was the source of frustration for many; the lack of a queuing system was referred to a number of times. One respondent also suggested selling tickets at 7pm rather than 7am, thus causing fewer difficulties for people travelling to work or risking arriving late for work.

"A 'timer' letting you know approx. how long before you can log in would be useful"

### *Club Travel*

A number of people made the point that, for away games outside London, train travel is preferable to coach travel, though it should be recognised that the train companies ability or willingness to meet this requirement are a stumbling block. Travel to European games was felt to be too expensive and some form of subsidy where destinations are difficult to get to. Ticket collection in Europe was unpopular.

"The club never have enough trains available for supporters who purchase away tickets. I do not want to travel to Newcastle by coach!"

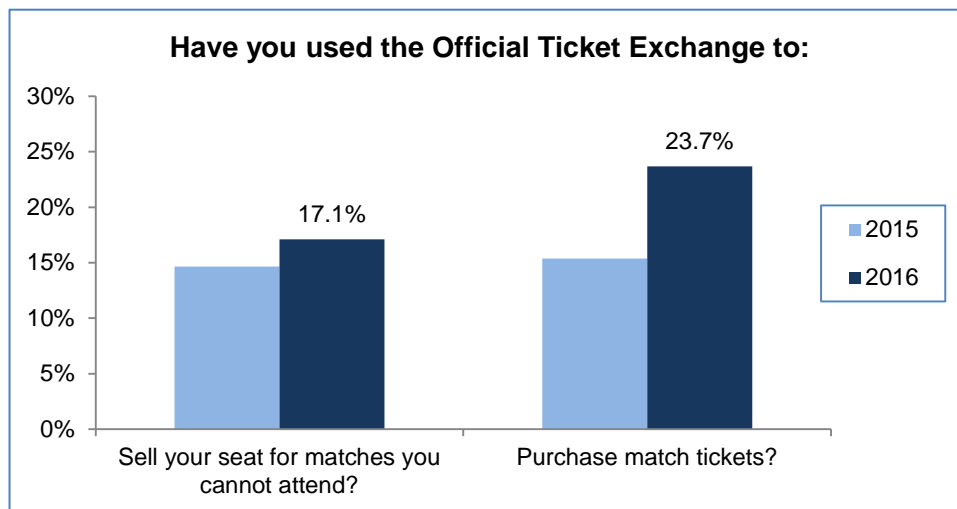
*Other*

Amongst other points raised were:

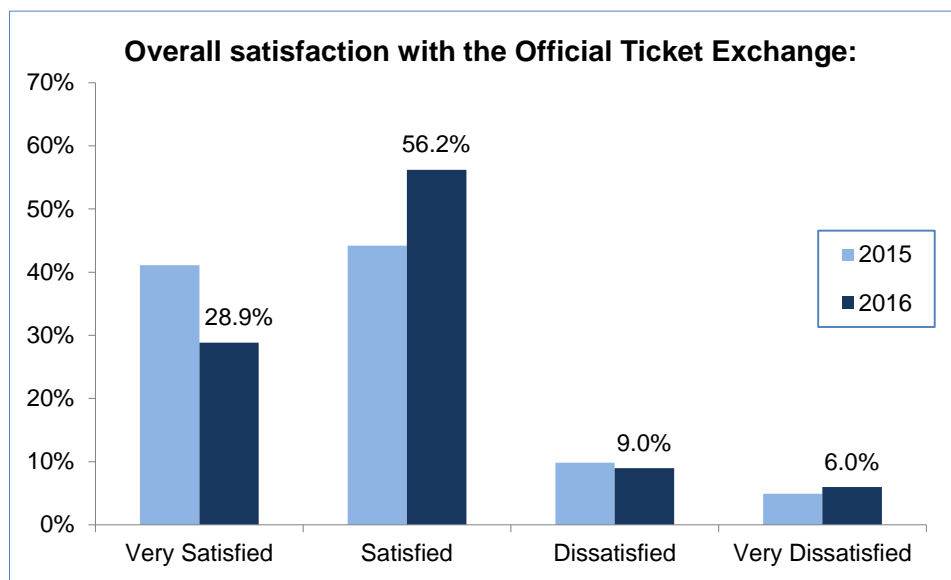
- Location of tickets for juveniles, with close proximity to the away fans an issue.
- Reference to too many 'tourists' present at the Bridge at the expense of local fans
- Dissatisfaction with the amount of ticket touts operating.

**Official Ticket Exchange**

The ticket exchange has been operating for two seasons. We asked whether people have used the service and what they thought of it.



It is encouraging to see that usage of the system has increased in its second year.



Respondents expressing satisfaction is unchanged at 85%, although fewer people are Very Satisfied, possibly as greater familiarity with the system exposes any shortcomings or perceived weaknesses in the way it operates.

Respondents were asked to comment on their experience of and opinions about the Official Ticket Exchange.

### *Loyalty Points*

A widely expressed view is that tickets bought through an official club channel should attract Loyalty Points, given how critical these can be in obtaining tickets for games in the first place. It is viewed as unfair that the Season Ticket holder gets the points when the member that attended the game doesn't.

"Allocate loyalty points to the person who attends the game."

### *Extend to All Games*

A significant number felt that the system should be available for all games, with members able to sell tickets that cannot be used. We can only speculate whether

"Allow members to sell tickets. Sell cup, CL and away games too"

this would be a popular request if Loyalty Points were removed from the seller, as members might be acquiring tickets for LPs and then reselling them.

### *Functional Improvements*

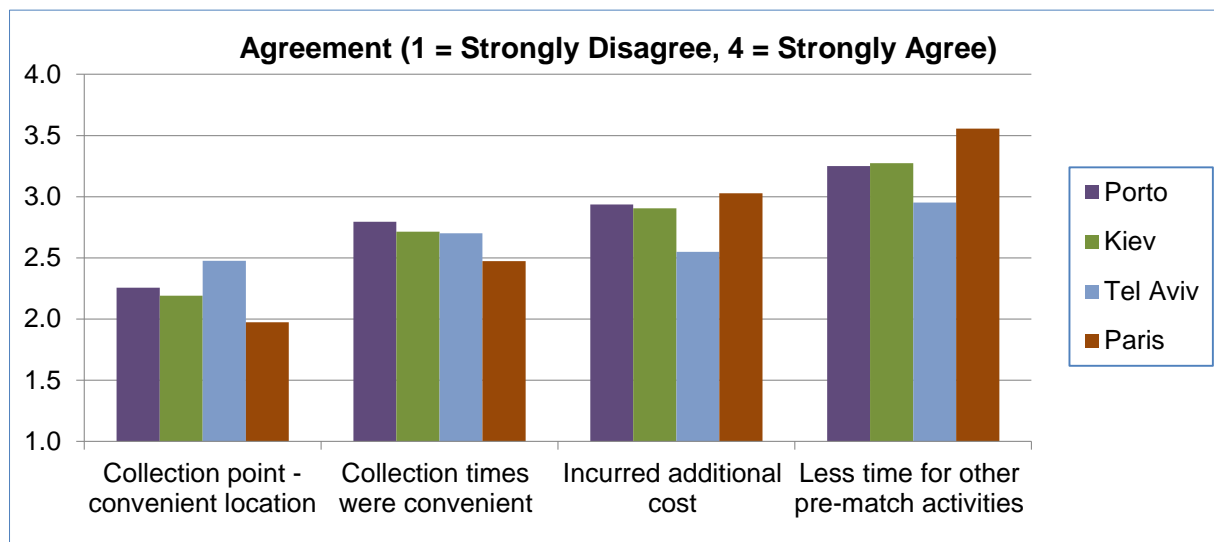
A number of changes were proposed:

- The most popular improvement would be to allow the listing of multiple tickets as a block, something Viagogo did support.
- The two day cut off was felt to be unduly restrictive, as some season ticket holders found they were unable to attend at short notice and unable to sell their ticket.
- The ability to handle higher volumes of tickets was requested.
- The restrictions on the sale of junior/senior and family tickets need to be reviewed, as they can prevent the resale of spare tickets if a like-for-like sale is not possible. This also ties in to the issue of listing multiple tickets.
- Allow ticket process to be reduced under certain conditions if the tickets are not selling.

"Currently if someone buys the Junior ticket only, I am left with an Adult family stand ticket than no one can buy (as per ticketing rules on individual adult ticket purchases in the East Stand Lower). This is unfair and leaves me out of pocket"

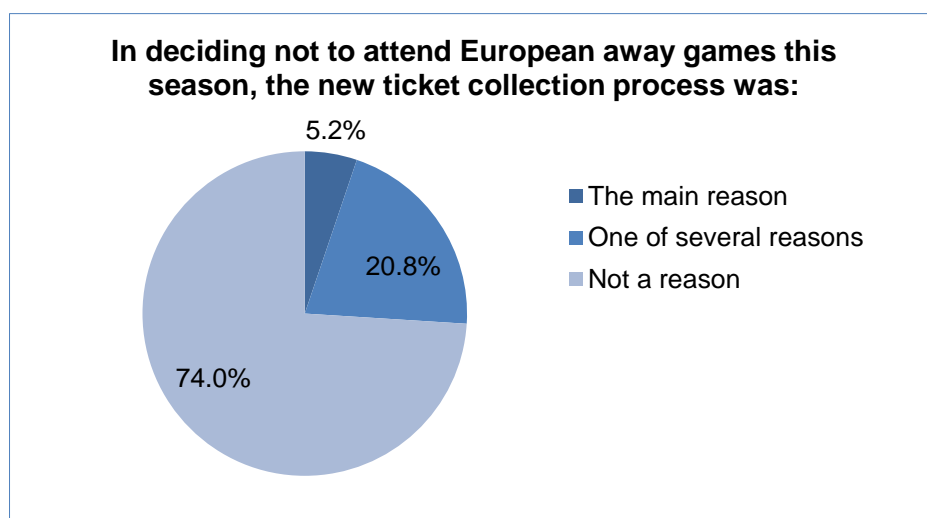
## EUROPEAN AWAY TICKET COLLECTION

Given the introduction of this system last season, and its possible use next season when the team return to European competition, we asked people to share their experiences. Of the survey respondents, 15% had attended one or more European games last season. We asked them to indicate their agreement with a number of statements for each match that they attended:



The **location of collection points** was clearly an issue, with only Tel Aviv coming close to a neutral reaction, and Paris clearly the worst location; with the exception of Tel Aviv, supporters incurred additional costs through this new arrangement. Collection times were seen to be generally acceptable across the travelling fan base. Where there was strong agreement across all venues was the manner in which the new arrangement **ate into the time spent enjoying the trip** away from the match itself, whether sightseeing, eating, drinking or socialising. The discontent with this is also clearly related to the convenience or otherwise of the pickup point.

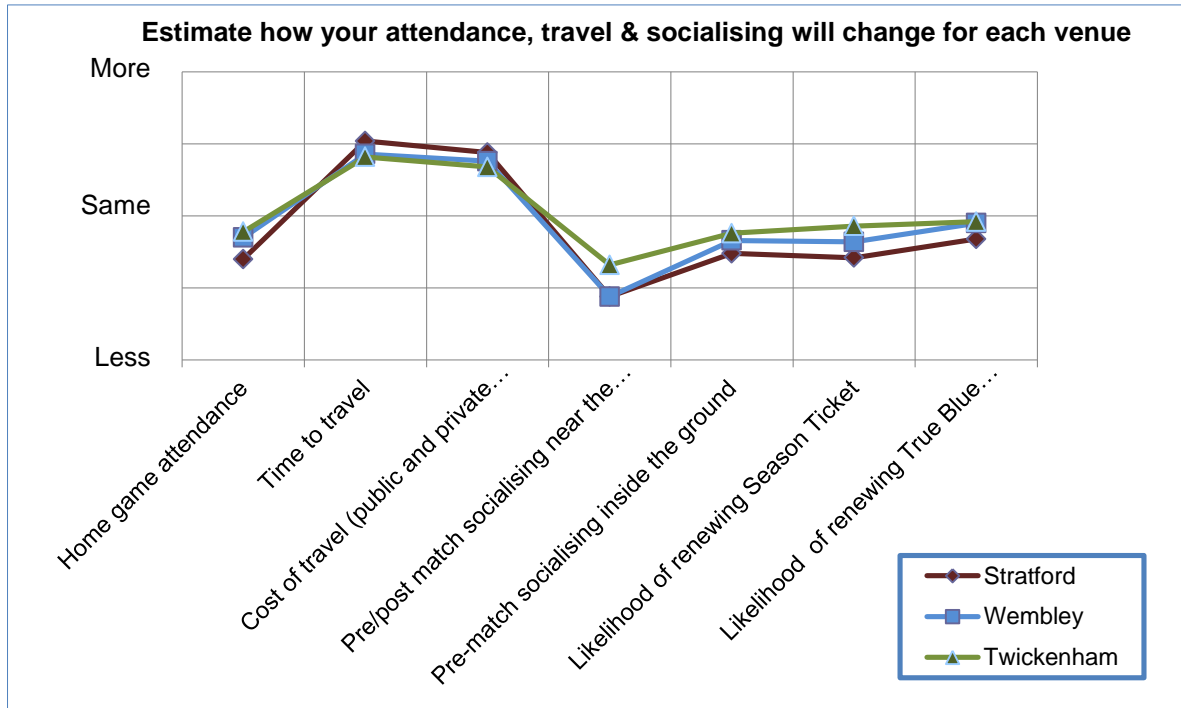
We also asked whether the new collection arrangements were a factor in non-attendance of European away games last season:



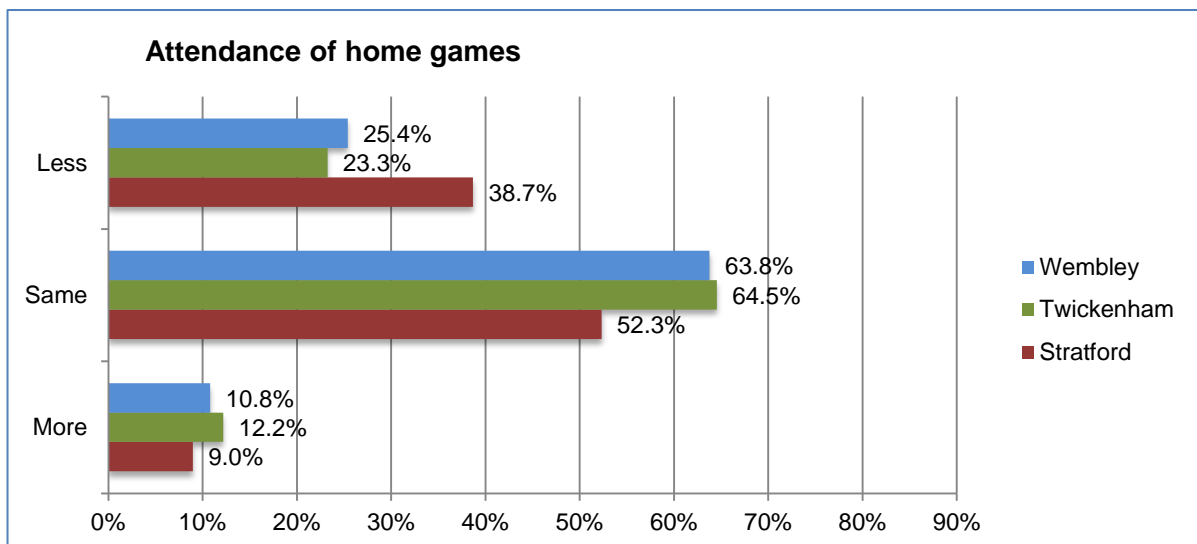
For a quarter of respondents, the new arrangements were a factor in the decision not to attend any European away games.

## TEMPORARY STADIUM

The Trust asked respondents how they thought their match day attendance and behaviour would be affected by the three venues currently featuring most strongly in speculation regarding the location of the home stadium whilst Stamford Bridge is being reconstructed. The following chart summarises the findings:

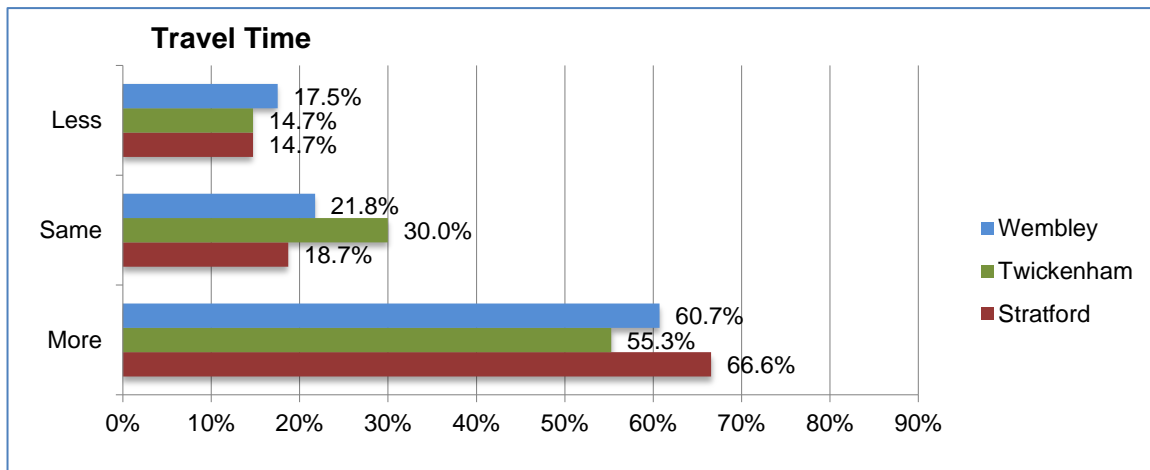


## Match Attendance



There is clearly going to be an impact on the match going fan by moving away from Stamford Bridge for a prolonged period. For all 3 suggestions, more than half indicated that their attendance levels would be unaffected; however roughly a quarter of fans suggested they would attend fewer games at Wembley and Twickenham, rising to almost 40% in the case of Stratford.

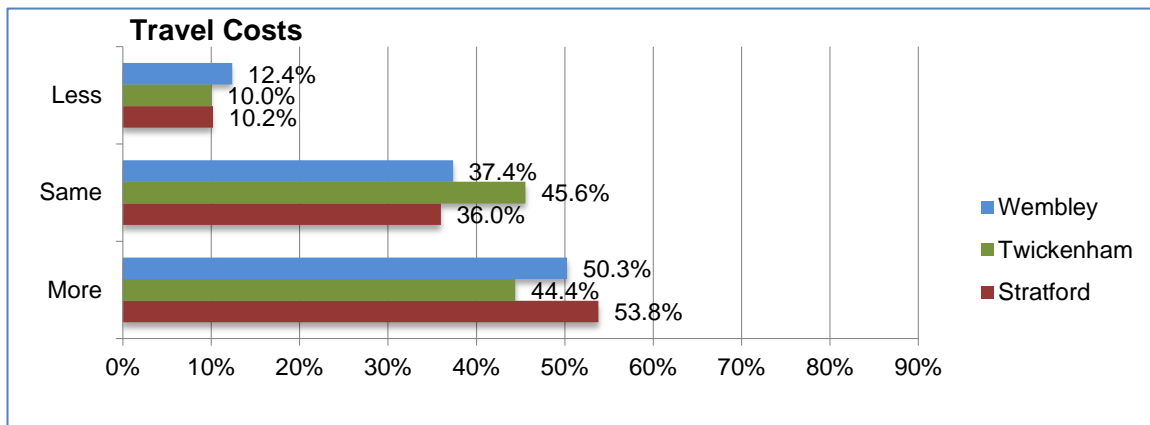
## Travel Time



All 3 options represent an increase in travel time for the average match going fan. Even Twickenham, viewed by many as the most natural choice of a large stadium given its location in South West London, is thought to require a longer journey time for more than half of the surveyed fans, presumably because it is not well served by public transport.

Roughly 15% of fans anticipated a reduction in travel time for all venues.

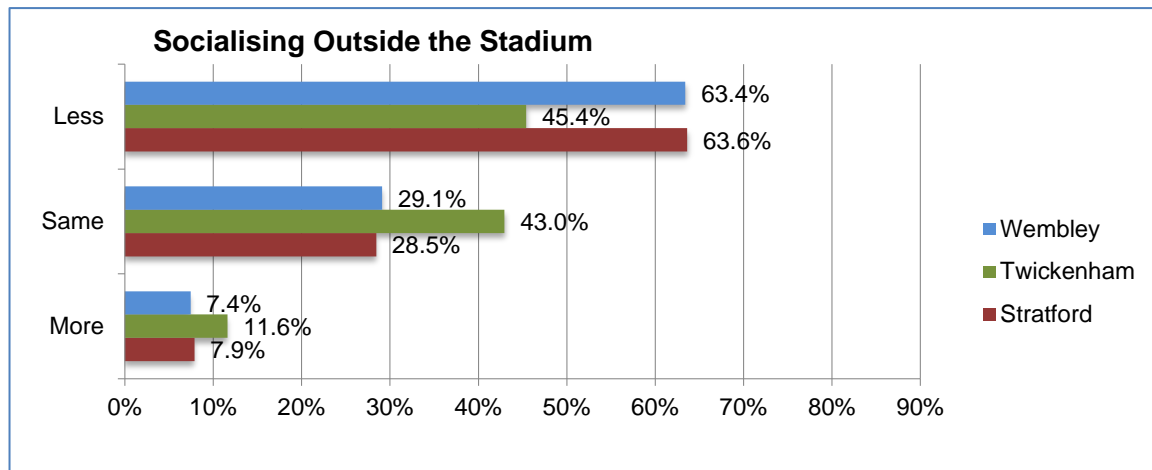
## Travel Costs



About 10% anticipate a reduction in travel costs; only Twickenham has less than half of the respondents anticipating paying the same as or less than they do at present.

Overall, fans are worried that they will be paying more to travel to the new venue.

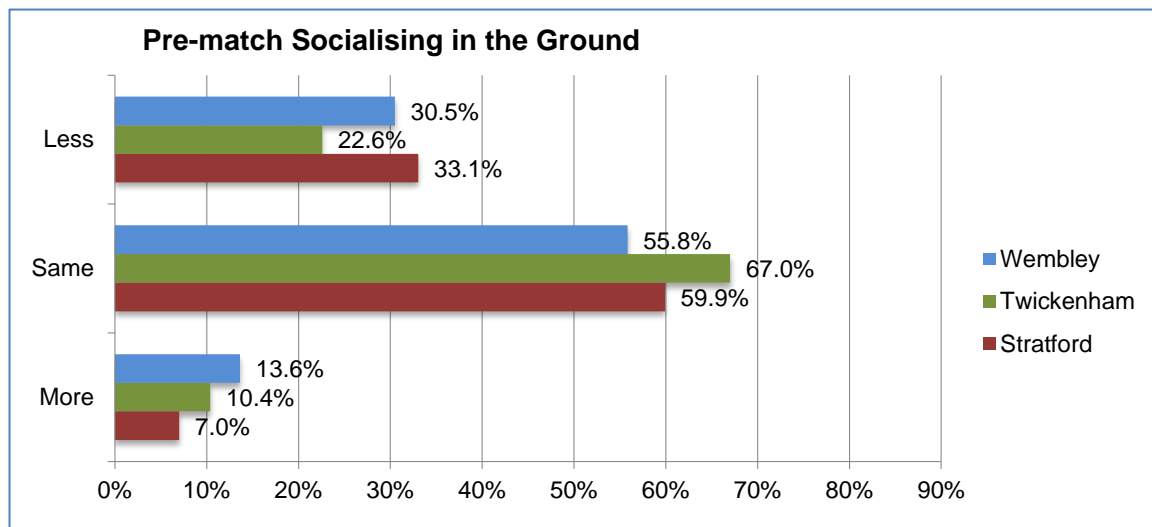
## Pre/Post Match Socialising Outside The Stadium



A significant part of the match day experience for Chelsea fans is the social side of the game: meeting friends and family for a drink or a meal before or after the game. It should also be acknowledged that we are spoilt for choice in the environs of Stamford Bridge, even with the closure of a number of pubs in recent years.

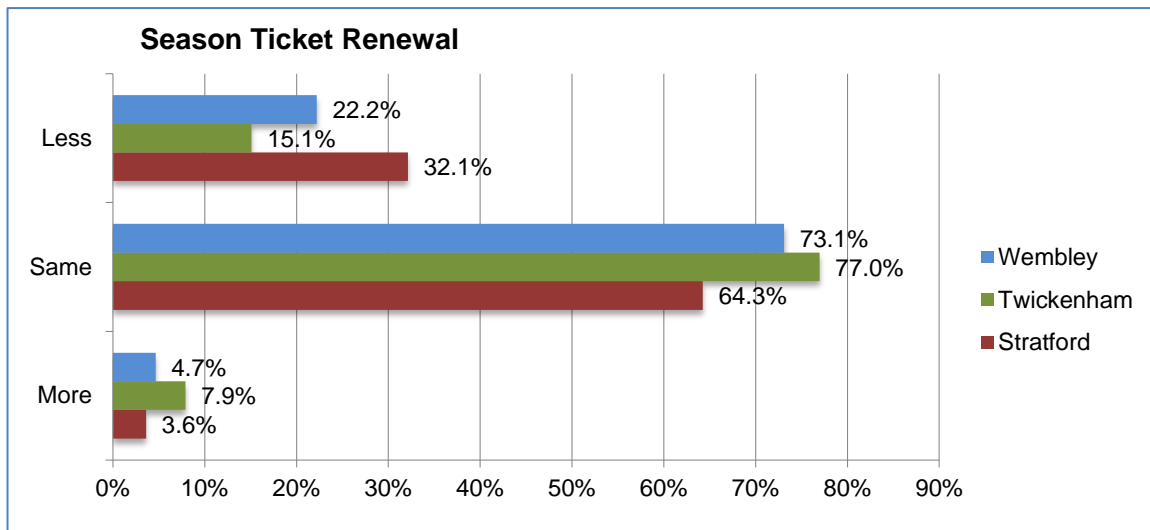
There is clearly a fear that the temporary stadium move is going to curtail these activities; Wembley and Stratford are both regarded by over 60% of respondents as providing fewer opportunities for such activities, with only Twickenham offering the same or more to more than 50% of supporters.

## Pre Match Socialising Inside the Stadium



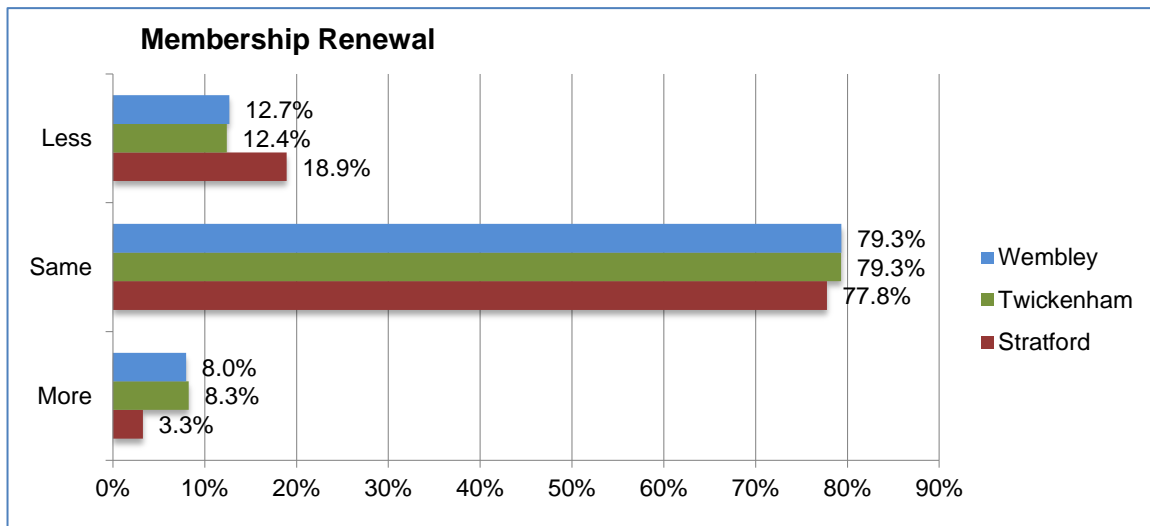
More than half the respondents felt that socialising inside the stadium would be unaffected, with Stratford faring significantly better than Wembley for once. However between 22% and 33% felt they would do less socialising in the ground than at present, with Stratford once more at the bottom of the popularity contest.

## Likelihood of Renewing Season Ticket



Most supporters are as likely or more likely to renew their season ticket, despite the move to a temporary location; however the numbers of supporters that are less likely to renew are still significant. Given that the decision to renew a season ticket takes into account all the factors we have surveyed, these clearly reflect the pecking order of the 3 stadia included in the survey: Twickenham appears the most popular option of the three, Wembley is second and Stratford is a distant third.

## Likelihood of Renewing True Blue Membership

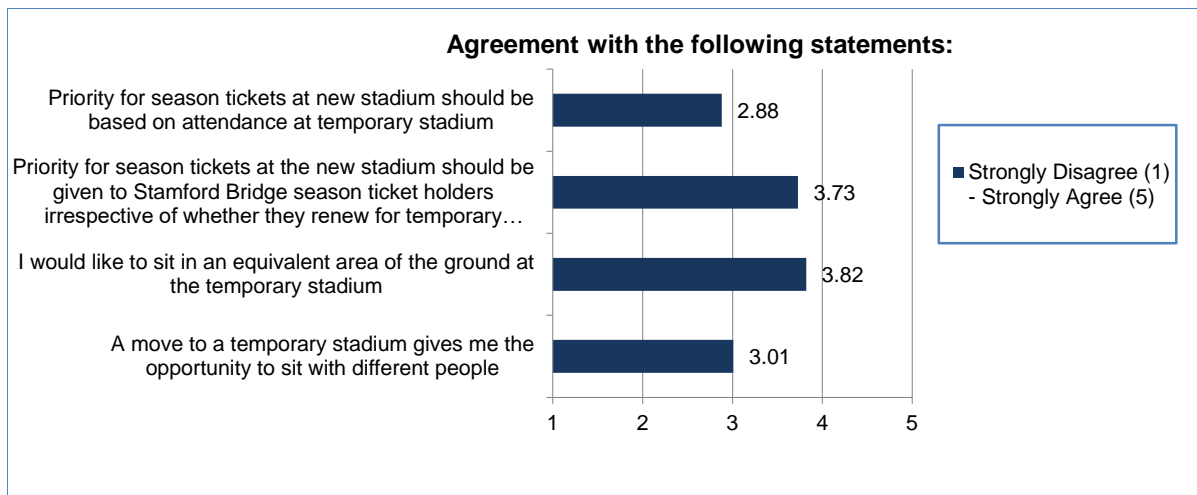


The response to this question reflects a less pessimistic view of the question for season ticket holders; 12% of respondents are anticipating that they are less likely to renew if the club moves temporarily to Twickenham or Wembley, rising to 19% for Stratford.



## Seating & Season Tickets

We asked the respondents to indicate their level of agreement with some statements on the issues of seat positioning in the temporary stadium and season tickets in the rebuilt Stamford Bridge:



The detailed results are shown below.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Priority for season tickets at new stadium should be based on attendance at temporary stadium	17.8%	25.3%	21.5%	22.8%	12.8%
Priority for season tickets at the new stadium should be given to Stamford Bridge season ticket holders irrespective of whether they renew for temporary stadium	6.7%	13.9%	13.2%	32.3%	33.8%
I would like to sit in an equivalent area of the ground at the temporary stadium	1.8%	3.3%	28.3%	35.0%	23.8%
A move to a temporary stadium gives me the opportunity to sit with different people	9.8%	7.5%	48.5%	23.0%	2.5%

It can be seen from these results that there is a feeling amongst the fans that the **priority on season tickets** at the rebuilt stadium should be given to **existing season ticket holders** *whether or not they renew for the temporary stadium*. It may be inferred that season ticket holders should not be punished if factors such as the additional time, potential cost, reduced socialising etc whilst away from Stamford Bridge lead them to attend games with less frequency than they do today.

It is even clearer that supporters wish to **sit in an equivalent area of the ground** to where they currently sit. This is an extremely complex issue for the Club to address, and not just because some grounds do not lend themselves to simple like-for-like comparisons. The lessons need to be learnt from the experiences of West Ham and Tottenham over the coming seasons in respect of the traditions of various areas of Stamford Bridge. Specifically, for example, one of the most vocal areas of the ground is the Matthew Harding Lower; regardless of where the Club play whilst the Bridge is rebuilt, situating likeminded fans together so they can enjoy the game in their traditional fashion needs to be considered.

We asked supporters for any other concerns in respect of the move to the temporary stadium.

### *Atmosphere*

The most significant topic raised was that of atmosphere in the temporary stadium, with concerns that this may suffer in the larger stadia proposed in the survey. Club banners and signage should be evident to promote the feeling of a home ground. Specific areas of the ground where the fans will be more vocal should be identified and advertised as such.

"Allocated singing areas should be made known"

"It is important that people are able to sit in a similar position to the bridge to benefit atmosphere"

There were also concerns that the atmosphere might be impacted if the whole stadium is not occupied for a game, and there is an opportunity for the club to price tickets to ensure that this does not occur.

"Fear we won't sell out at Wembley for several games... fear atmosphere will take a hit"

### *Midweek Games*

A number of fans were concerned with the logistical problems posed by attending midweek games, expressing the fear that the additional travel time and cost may prevent them going (particularly in respect of both Wembley and Stratford).

"My concern is travelling mid week. At the moment it takes less than an hour to get home after matches, if we move to either Wembley or Stratford it will take a lot longer and will also cost more"

The pricing of seats in the temporary stadium to ease the burden of additional costs on the match going fan (and in respect of atmosphere above) would be a welcome measure.

"Would be hard to attend evening week day games, for instance, because of time of the last train home"

### *Ground Sharing*

"Sharing with West Ham is a concern. Just doesn't seem right"

The resistance to sharing a ground with another club was noted, with particular reference to West Ham and Spurs but we suspect any Premier League rival would be considered unacceptable.

### *Ground Ownership*

Several respondents expressed the need to see the ownership of Stamford Bridge remain with the Chelsea Pitch Owners (CPO) and guarantees that the Club will return to Stamford Bridge.

"My concern is that we have no guarantee that we will return to the Bridge. I am a Pitch Owner and on past experience have very little faith in the people involved"

*Vox Pop – A selection of comments*

"We will struggle to keep support at Wembley and even more so at Stratford."

"1) The effect the ground move will have on junior ticketing and supporters groups in the MH and Shed. 2) Opportunities for safe standing 3) What will happen with signage/banners?"

"Wembley shouldn't be used for club games"

"Pricing. In view of the likely increased travel cost at whatever temporary venue is decided, I would like to see a considerable reduction in ticket prices, especially season tickets - not least to incentivise what is likely to be a drop in season ticket demand, but also to mitigate our increased costs."

"Travel away from the stadium (congestion at the station)"

"What the heck, it is temporary? As long as the club are flexible, so if your season ticket is in an awful spot or next to an obnoxious person you can shift."

"I would not want to be in corporate section at Wembley due to its lack of atmosphere"

"Seating location... will my view be the same/comparable with where I sit now? Will I be sat with the same people I sit with now?"

"I am seriously concerned about attendances at those grounds. I not sure that the Club will be able to sell out 80,000 and 90,000 seater stadiums"

"How will this affect the policies of the Supporters Club offices in regard to level of supporters clubs, loyalty points and access to tickets. We have asked and no reply"

"As someone who is keen to get a season ticket I'm hoping the stadium move will increase my chances of this happening."

"Ticket Collection Arrangements. Kick off times and dates changed due to clashes with other ground users making the game slot less attractive and harder to plan for"

"Season tkt holders should be given priority on choosing their seats in new stadium"

"Season tickets based on the current loyalty points system is laughable. A glory hunter starts the season on the same points as a lifer. Total joke."

"Those of us who sit in an upper tier won't be happy sitting in the lower tier at Wembley - or anywhere else!"

"If the redevelopment does go ahead our period at the temporary stadium will be 3/4 years which, for a temporary move, will be long term. My concern is we must feel it is our stadium."

"What will be the share of gate at temporary stadium between corporate and standard tickets?"

"Not being able to sit with the friends I sit with currently - all are season ticket holders. The extra time to travel to Twickenham and even Wembley will be a challenge on most games"

"Ticket prices should not be increased in the temporary stadium and if the capacity of the stadium is significantly more then consideration should be given to reducing tickets slightly as an incentive to keep people interested."

"Move will be OK for weekend games, but midweek evening games may be a problem"

"New stadium tickets should be sold based on number of years holding a season ticket. So the longer you have had an ST, you get to pick seats in any new stadium"

"I worry that there won't be enough fan engagement on it (lots of open forums with as many opinions as possible); with due respect to the CST, I feel this is a big issue which should be opened up to all fans. I'm also wondering when they're going to speak to CPO shareholders about all this again after the previous shambles and lies told in the attempted land grab."

"At the temporary and the new stadium will ST holders be able to apply as a group so that we DO sit next to the same people?"

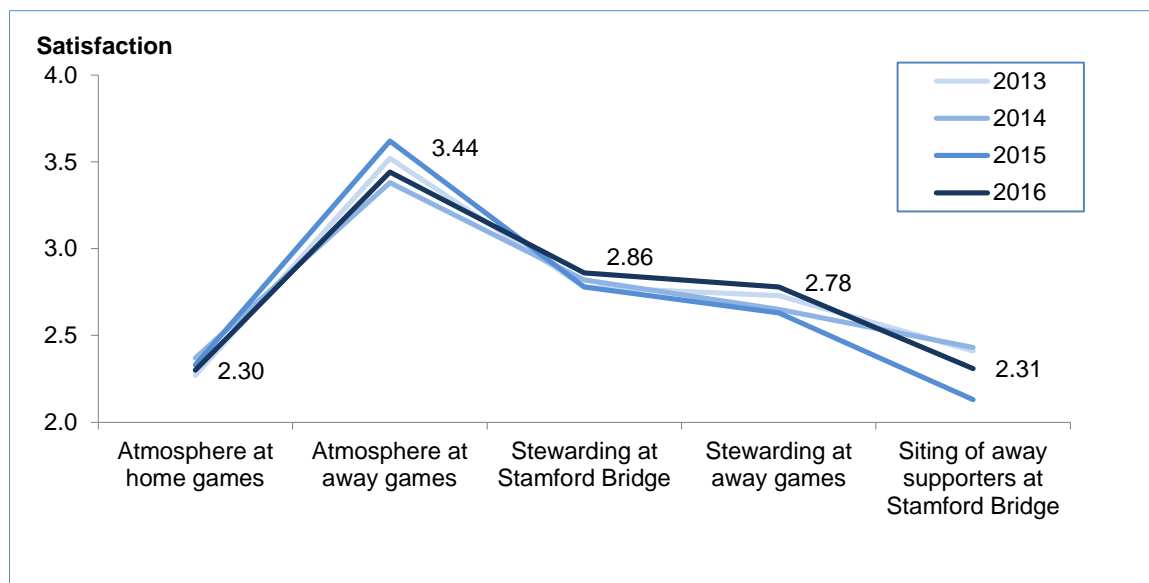
"Would the club consider running free shuttle buses from SB to Wembley/Twickenham to assist supporters with transport issues/costs?"

"I dearly hope we don't come back and find that local pubs have gone out of business after relying on supporters for so long"

"seats in areas where the tendency is to stand all or most of the match. As a pensioner this is a bit of a challenge nowadays."

## ATMOSPHERE

We asked the respondents to rate their satisfaction with atmosphere and stewarding on a scale of 1 (Very Dissatisfied) to 4 (Very Satisfied).



As in previous surveys, there has been little significant change in the responses given this year. In respect of atmosphere, home games are virtually unchanged whilst away was slightly less satisfactory than the previous season. Satisfaction with stewarding home and away has improved by a small amount, as has the satisfaction with the location of the away fans at Stamford Bridge. Atmosphere at home games and location of away fans still rate as less than average.

When asked for suggestions as to how the atmosphere in the ground could be improved, the following themes emerges:

### Standing

The most frequently mentioned idea was the introduction of safe standing at

"Safe Standing Area. Lead the way, not fall in behind."

Stamford Bridge, and whilst it should probably be recognised that nothing is likely to change in the current configuration, if the redevelopment of Stamford Bridge goes ahead as proposed, there is a

strong feeling that the redevelopment of Stamford Bridge is an ideal opportunity for Chelsea to take a lead by building in safe standing from the start.

"Standing area in developed stadium for like minded people"

### Location of Away Fans

Not far behind safe standing is the desire to see away fans moved out of the Shed which many still see as Chelsea's traditional home end, with the East Stand generally their preferred destination, with a majority suggesting the Upper rather than Lower tier.

"Away fans in the east upper - home fans behind both goals unless it's a cup match"

### Other

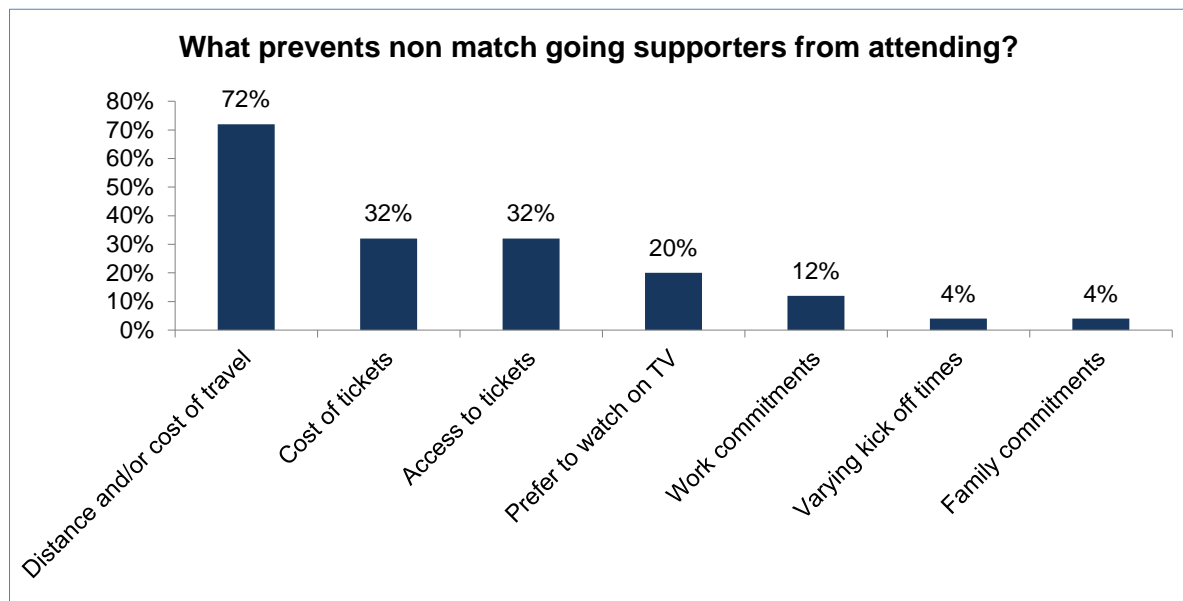
Other key points noted included:

- Reduced ticket prices generally
- More concessionary tickets for younger and local fans
- Fewer tickets/packages for tourists
- A more relaxed attitude from the stewards
- Specific singing areas, with like minded fans sitting together
- More promotion of supporters groups such as *We Are The Shed*

"Get real supporters back - teenagers and the like. Encourage kids - forget the plastic tourists - they will be gone if we have a poor run"

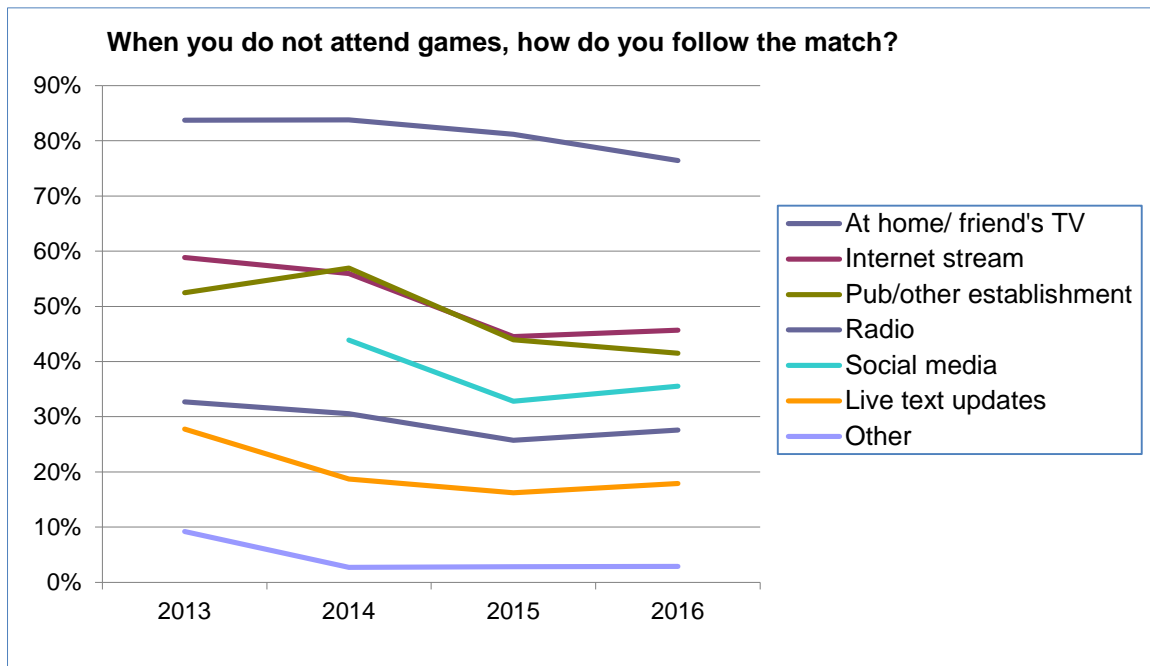
## NON MATCH GOING FANS

We asked the respondents who described themselves as 'non match going supporters' what prevents them from going to matches.



The dominant theme was simply distance; Chelsea being a leading Premier League club, with a global profile to match, there are a lot of supporters for whom going to a game remains a dream. The price of match tickets remains a significant barrier to fans, as does actually being able to get hold of them through official channels.

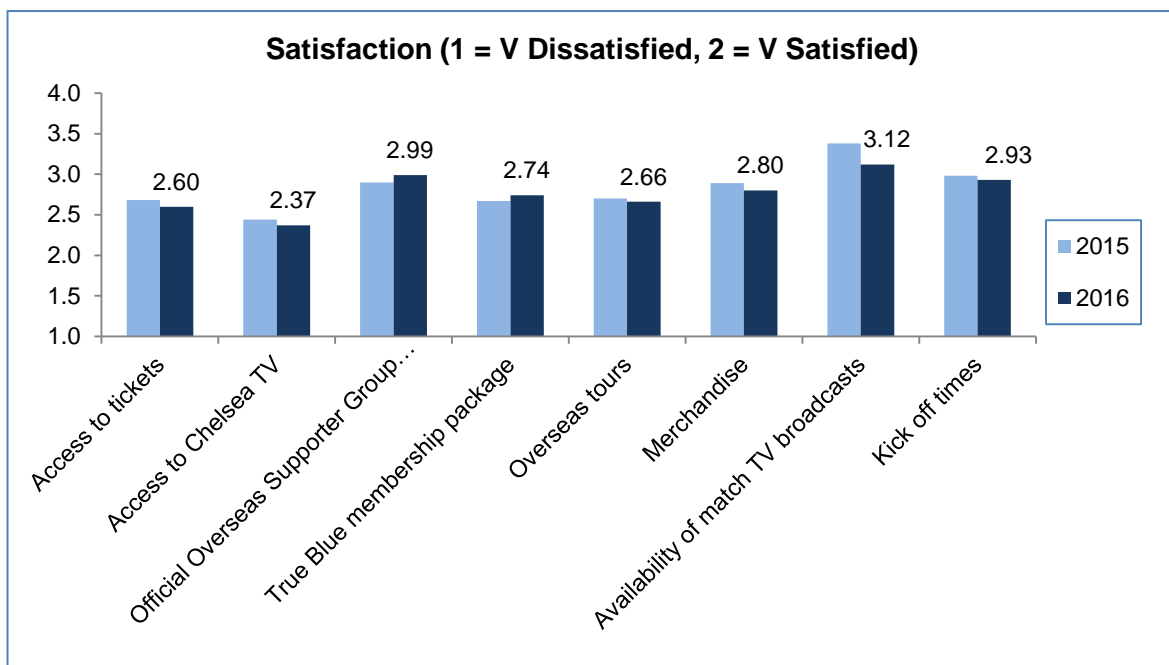
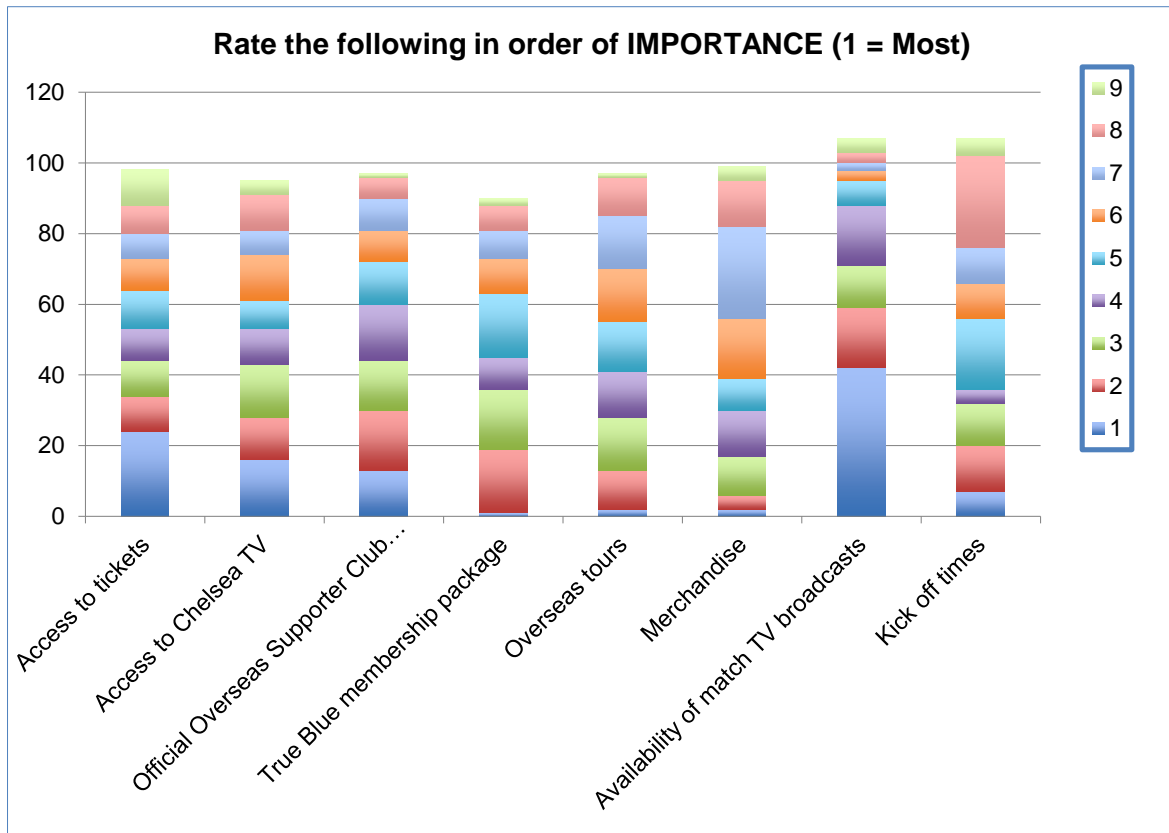
We also asked about the different means by which people followed a match at Stamford Bridge when they could not attend in person.



The last year saw the continuing decline in people watching the game at home or at a friend's house; however this is still the most popular way of following the match. Watching at the pub also declined again, whilst use of social media and Internet streams increased as did radio.

## OVERSEAS SUPPORTERS

We asked overseas supporters to rank and compare both importance and satisfaction with aspects that are unique to their situation.



Unsurprisingly the availability of Chelsea games on TV was the single most important item for more respondents than any other. Although less satisfactory than in the previous survey, this is still the item with the highest satisfaction rating. Access to Tickets, Access to Chelsea TV and Overseas Supporter Club Membership also feature highly in their importance; although the Supporters Club Groups score well for satisfaction, ticket access is barely above the midpoint and Chelsea TV is the least satisfactory item surveyed.

"...it costs \$100+ to buy a jersey in the US. In addition, the selection is much worse than in the Asian or European stores."

In their comments, North American supporters complained about selection and price of merchandise available to them in the US store, compared to other international markets or that available in the UK.

Supporters also expressed the frustration of the difficulties acquiring sufficient Loyalty Points to attend games and praise for the official supporter groups as their only route. More publicity from the Club could boost these groups.

Across various questions in the survey, a recurrent theme for international fans has been the difficulty in knowing when the game will actually be played far enough in advance to book the holiday to come over, whilst not knowing if they will be able to get tickets even if everything else falls into place.

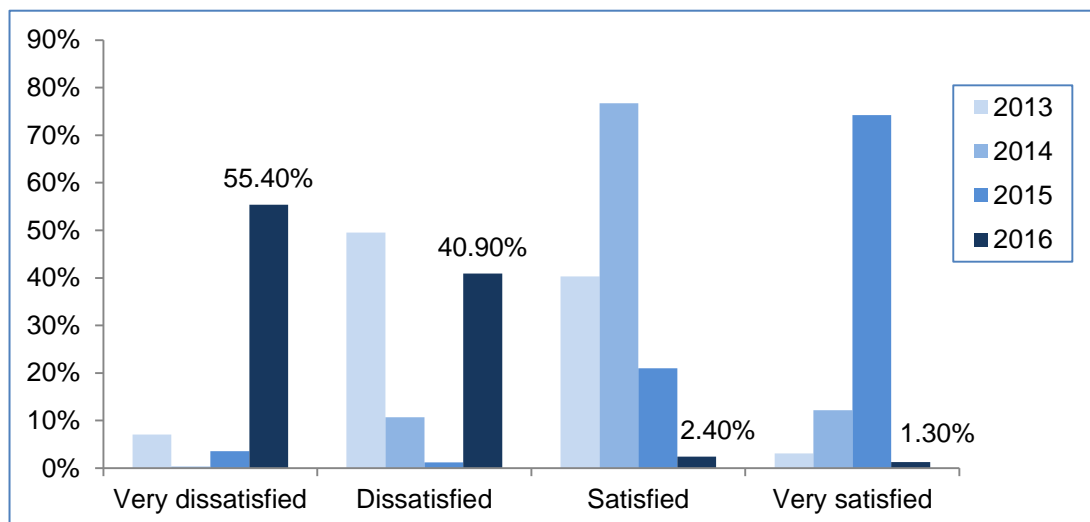
"The messaging to overseas supporters (American) that third party markets like Stub Hub do not exist for match tickets is practically nonexistent - less people sign up for membership unaware that it's the only way to purchase non-hospitality tickets"

"New loyalty point requirement this year sucks... forget about going to UK after October 31"



## ON-FIELD PERFORMANCE

Participants were asked how satisfied they were with Chelsea's on-field performance in season 2015/16:



It was no surprise to see the massive expression of dissatisfaction after Chelsea's team endured their 'annus horribilis' last season. The biggest single factor, commented on by almost half of the respondents to this question, was the attitude and application of the

"Didn't mind the losses as much as the disinterest the players often showed"

"Chelsea looked less like a team who wanted to play together and win or lose together, and more like a bunch of mercenaries"

players on the pitch and a lack of leadership or spirit; it was clear that the fan base felt let down by the individual players to an unacceptable degree.

"They should be ashamed and consider how much we spend to follow and make the same effort we do. I was at Sunderland last weekend and again at Liverpool on Weds. I took 2 days leave and spent almost a thousand Euros"

The general lack of achievement and poor performances by the team as a whole were unsurprisingly also mentioned in a lot of comments. The Club management and internal problems within Chelsea were frequently referred to, with a handful of specific references to the Technical Director and also the running of the Club by the Owner.

"...stubborn refusal to change the players who were consistently under performing for him."

Opinions on Mr Mourinho were more or less equally divided, with as many blaming the Board for not backing the manager over the players as there were people blaming Mr Mourinho for both poor team performance and other

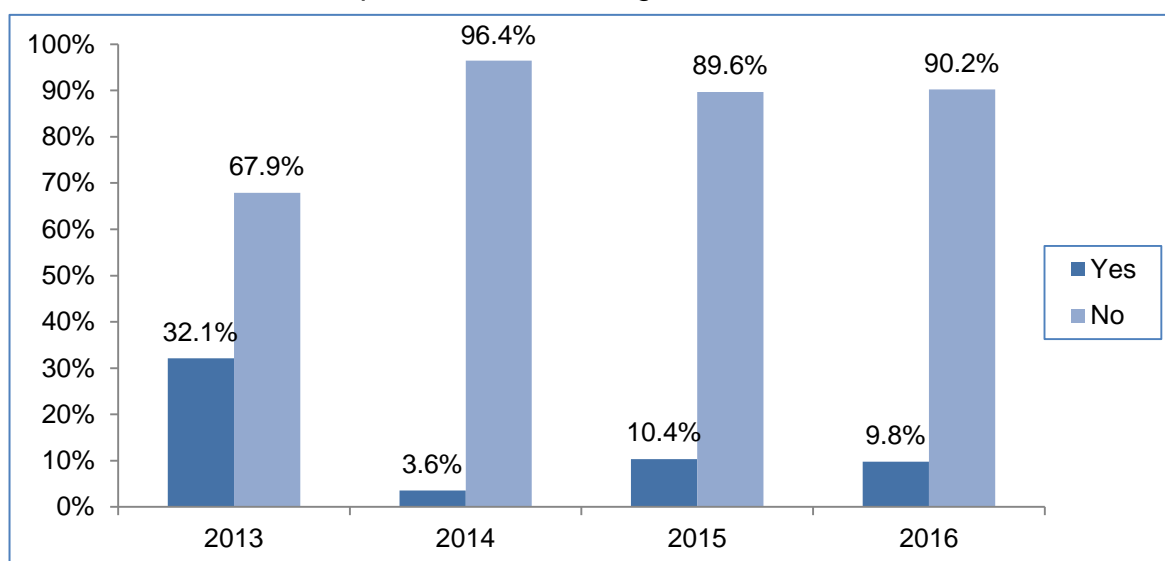
"Our greatest ever manager was not sufficiently supported, neither in the summer transfer market nor anywhere else"

issues that enveloped the Club.

Amongst the respondents, there was a definite feeling that younger players did not feature strongly enough in the second half of the season once the position in the league had been stabilised, and that an opportunity had been missed. The failure to reinforce the playing squad in the summer of 2015 and the transfer policy in general were also criticised.

"The opportunity to blood youth players was not taken"

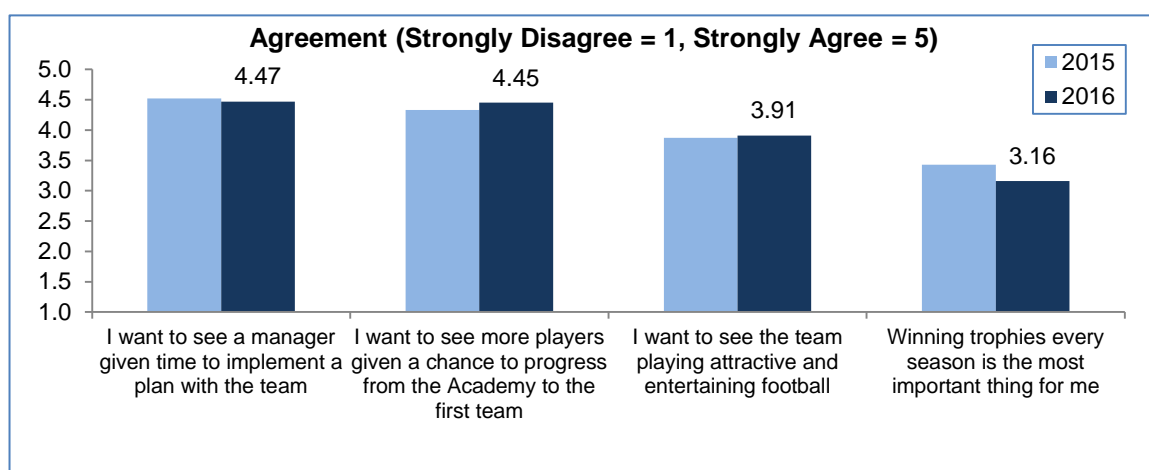
Respondents were asked whether their feelings about the past season had affected their decision to purchase tickets to games or renew their season ticket.



Despite the disappointment of the 2015/16 season in sharp relief to the Premier League and League Cup double of the previous season, intentions to purchase match tickets or renew season tickets were more or less the same after these two contrasting seasons.

It is evident from the results of the survey over the last four years that the events around the Club in the 2012/13 season had far more impact on renewal decisions than the events of last season, which was by a long distance the worst football season of the era of Mr Abramovich.

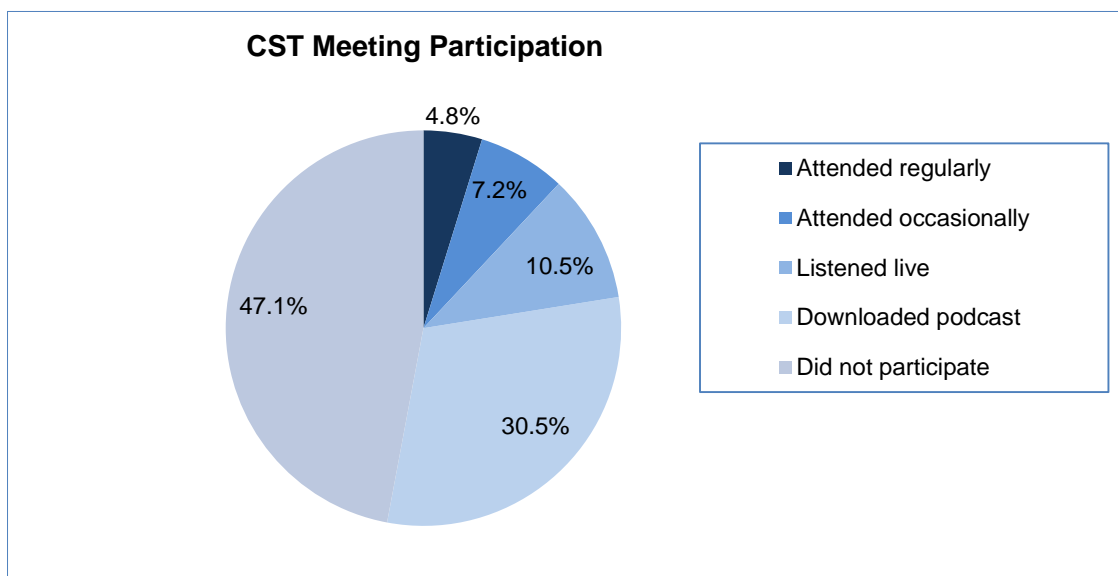
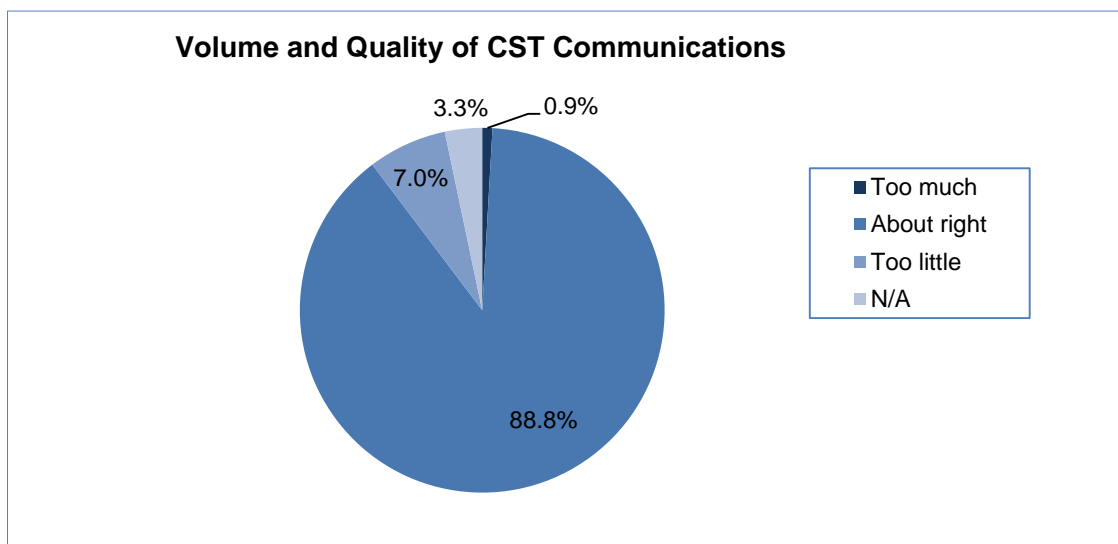
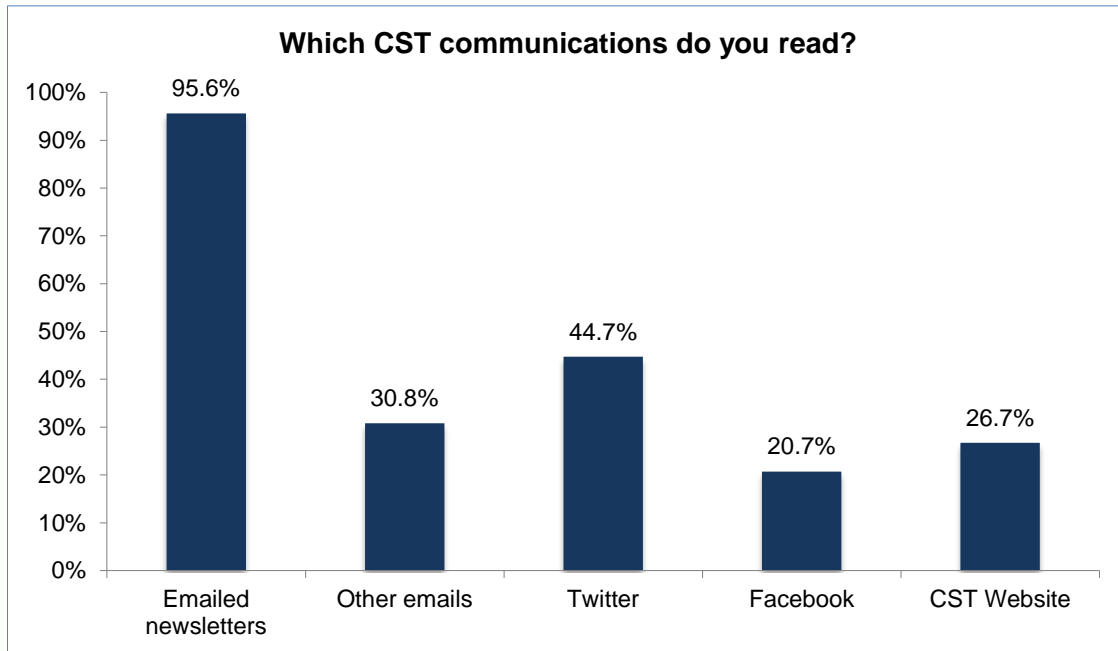
Participants were asked to indicate their agreement with a series of statements concerning the on field performance and strategy.

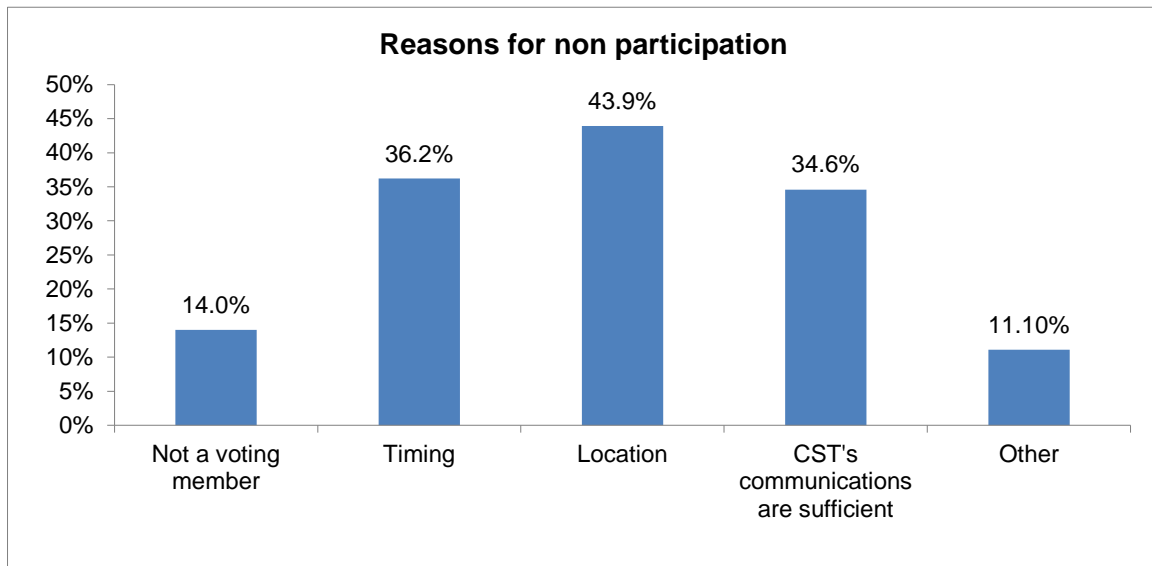


Largely unchanged from last year, management stability and bringing home grown players through to the first team are seen as more important than attractive football and consistently winning silverware, which reduced in importance this year.

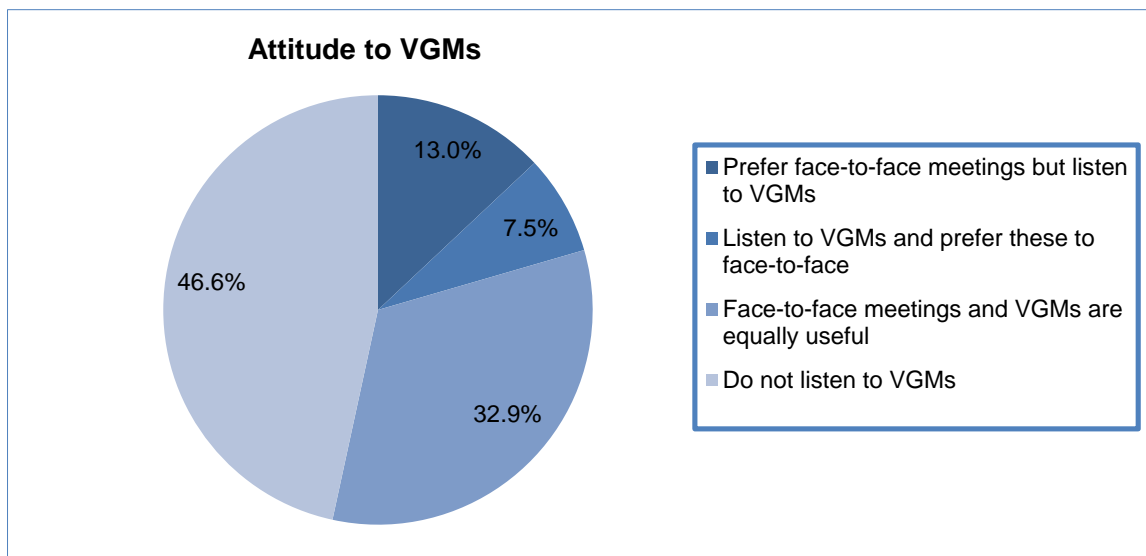
**CHELSEA SUPPORTERS TRUST**

The survey asked respondents their opinions regarding the CST's performance.





The membership was asked about their attitude towards the Virtual General Meetings that the CST has held during the year.



## DEMOGRAPHICS

This section describes the make up of the respondents to this survey.

