



CHELSEA SUPPORTERS' TRUST MEMBERSHIP SURVEY

SUMMARY

- The members 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: particularly the aging demographic of current support and the lack of atmosphere. There is concern that the Club is sacrificing longevity for short term gain. With the emergence of fans brought up with watching matches on TV, attending games will become a one off occasion rather than a habit, demanding a support base that may be unsustainable over an extended period, given the ups and downs of on field performance. Additionally, supporters are reaching breaking point concerning the prices for many away games and are keen to support a realistic across the board pricing initiative for away supporters.
- Supporters see no discernible **long term plan** for Chelsea from the current Board and perceive that their concerns and aspirations are either not taken into account or not properly understood. This and the unease about instability at the club culminated last season with the appointment of an almost universally disliked interim manager.
- The majority of Trust members agree that **winning trophies** every year is not the sole reason for supporting Chelsea. They are willing to accept a period of transition, particularly if that means that younger, home grown players are given a chance to break through into the first team and that elsewhere the club follows a sensible transfer policy.
- Atmosphere at home continues to be a major concern for supporters. Almost all are agreed that a modern return to the terraces, modelled on the experiences of the Bundesliga would be welcome and we would encourage the Club to pilot a **safe standing** scheme which is being promoted by the Football Supporters' Federation.
- There are opportunities for **local businesses** to capitalise on Chelsea's support. Almost 60% avail themselves of pre-/post-match refreshment in the vicinity of the ground. With many living relatively locally, there may be openings to nurture client loyalty outside of match days.
- Management of the **Loyalty Point scheme** remains controversial but presents a chance for the Club and Trust to work together to identify fair allocation of both points and tickets.
- Although almost all Trust members would support some sort of officially backed **ticket exchange** facility. The current partner, Viagogo is almost

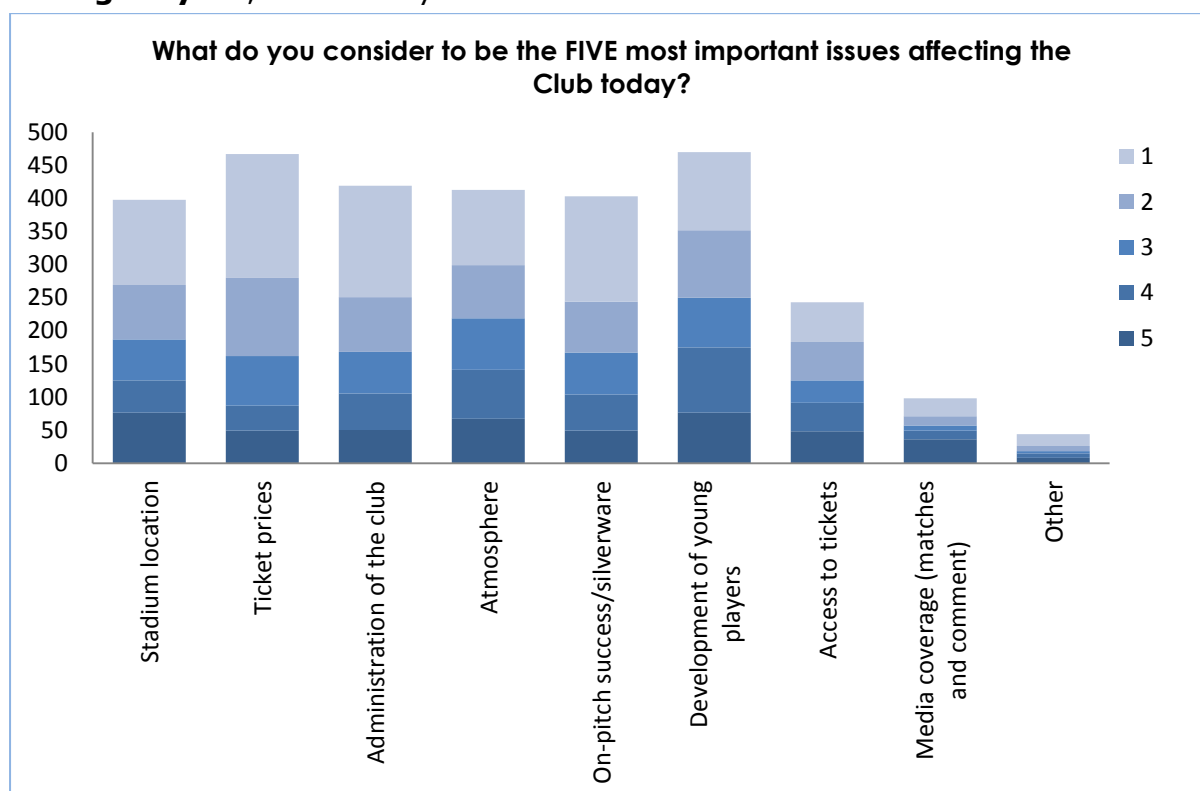
universally condemned both for excessive fees and for their other sell-on ticketing business.

- The growing number of **overseas supporters** have a mixed experience in obtaining tickets to visit Stamford Bridge. There is an opportunity for the Club and the Trust to publicise and encourage official supporter clubs which seem to provide the most effective means of purchasing tickets.
- A significant number of supporters do not want to move from **Stamford Bridge** and fewer than 5 % of regular match-goers would consider a move away from the immediate area. It is clear from feedback that further exploration of potential choices is required and this should be a priority for future surveys.

KEY ISSUES

Trust 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**, followed by **Club Administration**. Receiving the most votes overall were: **Development of Young Players**, followed by **Ticket Prices**.



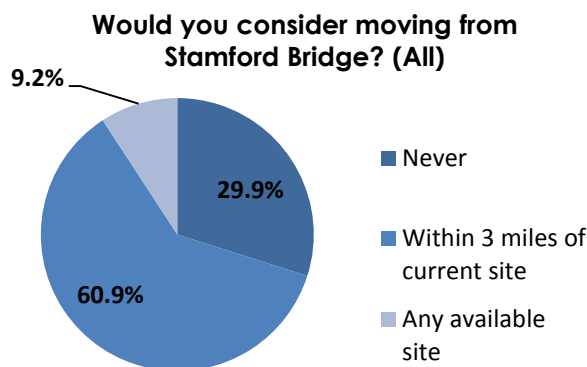
The **Other** issues raised by members, in order of frequency were:

- Management stability
- Communication with supporters
- Fixture scheduling (kick off times, changes, etc.)
- Football matters (transfers, style of play)
- Match day issues (refreshments, stewarding, megastore)
- Safe standing
- Match going demographic
- Travel
- Club media

THE STADIUM

Location

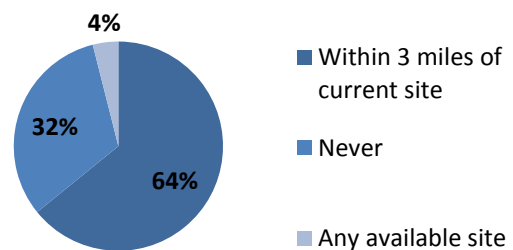
There has been a great deal of discussion regarding the future of Stamford Bridge. Trust members were asked whether they would consider a move away from the present location. The option of 'within 3 miles' reflects the option given by the Club during the recent attempt to buy back CPO shares and represents the furthest border of the borough of Hammersmith and Fulham. From feedback received it appears that opinions are more nuanced and could be the subject of a more in-depth survey in the future.



A significant majority of **all Trust members** would be prepared to move site to somewhere near the current locality of Stamford Bridge

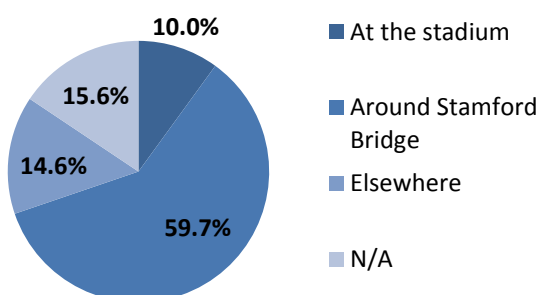
Among **match-going supporters** (Trust members who described themselves as **Season Ticket holders** or **regular match-goers**), the ratio changes with a higher proportion who are not prepared to leave Stamford Bridge and fewer considering a move to any available site

Would you consider moving from Stamford Bridge? (Matchgoers)



Facilities

Where do you mainly purchase drinks/refreshments before the match?



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

Trust 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):

	Average Rating
Commercial and business development	2.90
Enhancing the supporter experience	2.14
Handling of PR and media issues	1.86
Open dialogue with supporters	1.76

- There is satisfaction with the way in which the Board is developing the commercial and business aspects of the club, but supporters are dissatisfied with all the other areas.
- There have been a number of negative stories during the course of last season, for example the Clattenberg affair which, coupled with the general view that the press treat the club less favourably, amounts to a high number of respondents that are very dissatisfied with the way in which the image of the club is projected in the media.
- The high number of **Very Dissatisfied** with regard to dialogue with supporters reflects the issues raised by several respondents in the key issues section.

Club Policies

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

	Agree
The Club has achieved much success because of the investment of the owner	98.8%
The Club values match day supporters	18.2%
The Club's policy with regard to managers has been a factor in our success	15.8%
There is a well-publicised long term vision for the Club	10.8%
The Club is in touch with supporters and has a good understanding of their hopes and concerns for the future	5.5%

- Almost everyone agrees that the investment of the owner has been a key factor in the club's recent success.
- Supporters are looking for a shared long term vision for the club – only 10% currently believe that there is one
- Only 5% of Trust members believe that the club administration understands what their hopes and concerns are. That is, an empathy with the underlying culture of Chelsea Football Club. If this is considered alongside the response to Question 20 of the survey (general disagreement that winning silverware is the most important thing) and the **Key Issue** of bringing players through the youth system, it demonstrates that success and investment motivate supporters less than a feeling of continuity and community.
- There is also a perception that the club does not value regular match-goers and this may be the downside of the vote of confidence in the club's management of business and commercial aspects, demonstrating a reluctant

understanding that match day revenue is becoming less important compared to TV deals, prize money, sponsorship and merchandising.

- As illustrated by the other topics raised in the **Key Issues** question, the majority of supporters do not think that the turnover of managers has been a factor in our success.

Financial Fair Play

Trust members were asked to indicate their agreement with a series of statements concerning the UEFA Financial Fair Play regulations.

	Agree
I would like to learn more about how the FFP rules are meant to work	58.1%
I am concerned that FFP rules will lead to the same clubs with large income streams dominating football every year	47.7%
I believe it is unfair to prevent owners investing their own money in their club if they wish to do so	46.0%
I support the FFP regulations	20.5%
I believe UEFA will strictly enforce FFP regulations	12.6%

- As a club with a generous owner, it is unsurprising that only a minority support UEFA's FFP regulations, with just under half saying that it is unfair to prevent owners investing their own money in a club.
- A similar proportion of respondents believe that the way in which the regulations are set up will preserve the status quo and stifle competition.
- A majority express scepticism that UEFA will actually be able to police their regulations.
- Over half the respondents would like to learn more about the 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).

	Average Rating
Home league games	2.17
Away league games	2.22
Home domestic cup	2.90
Home European games	2.58
Junior/juvenile pricing	2.69
Cost of Season Ticket	2.34
Cost of Membership	2.86
Administration fee	1.97
Categorised pricing for league games	2.25

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

Sustainability

- There is agreement that the traditional supporter is being priced out of Premier League football.
- There is a great deal of concern that our current match-going support is aging and that, although some positive steps have been made by the club, the next generation of support 18–25 year olds, are unable to afford to attend games on a regular basis and will not get the 'habit' of attendance. The fear is that in turn we are in danger of losing future generations as people attend less regularly and football becomes less of a priority.

"To watch Wigan v Chelsea is £20 To watch Chelsea v Wigan is £48! Same 22 players on the pitch."

- It was noted by several respondents that in order to continue to fill Stamford Bridge in the years to come, the support base will have to be increased many times over when pricing, availability of football on TV/Internet and old age deter attendance. Whilst it is hoped that our present success continues, long term supporters understand that this may not be the case and are concerned that it will become an impossible task to sustain the support base if the club relies on tourists and casual supporters.

Administration Fees

- With many supporters buying multiple tickets there is a preference for an administration charge per transaction rather than the current charge per ticket.
- Most people understand that there are costs associated with issuing tickets, but believe that the club could reduce costs for example by posting tickets ordered at the same time for different matches in the same envelope and adding additional matches to season tickets electronically.
- Some respondents believe that the cost of the ticket should be inclusive of any administrative overheads.

Home Ticket Pricing

- There was much admiration for the Bundesliga model of ticket pricing which result in high attendance and a feeling that the club and Premier League could learn from this.
- There is dissatisfaction with the cost of Champions League group games with suggestion that they should be priced at the same level as for FA Cup ties.

There was some suggestion that prices for European games should be based on attractiveness of opposition and that domestic cup ties should take account of whether they are being televised.

"The future of our club is the younger fans, not day tourists. If/when we have a few seasons where we drop down in the premier league table, who's going to return?"

Apart from the actual cost, supporters want to see a full stadium and believe it makes economic sense to reduce prices of less popular games. It is noted that domestic cup games used to be included in the price of a season ticket;

- Consensus is that league prices are outrageously high although there is recognition that high quality players and facilities come at a price. However,

some respondents believe that match day revenue is relatively inconsequential in regard to club finances and therefore high prices cannot be justified on this basis.

- There is praise for Junior/Juvenile and Senior pricing although respondents believe the former age group should be widened. There is also concern as to the limited availability of these tickets.
- A recurring theme is the new TV deal and the belief that this windfall could be used to bring down the cost of attending games.

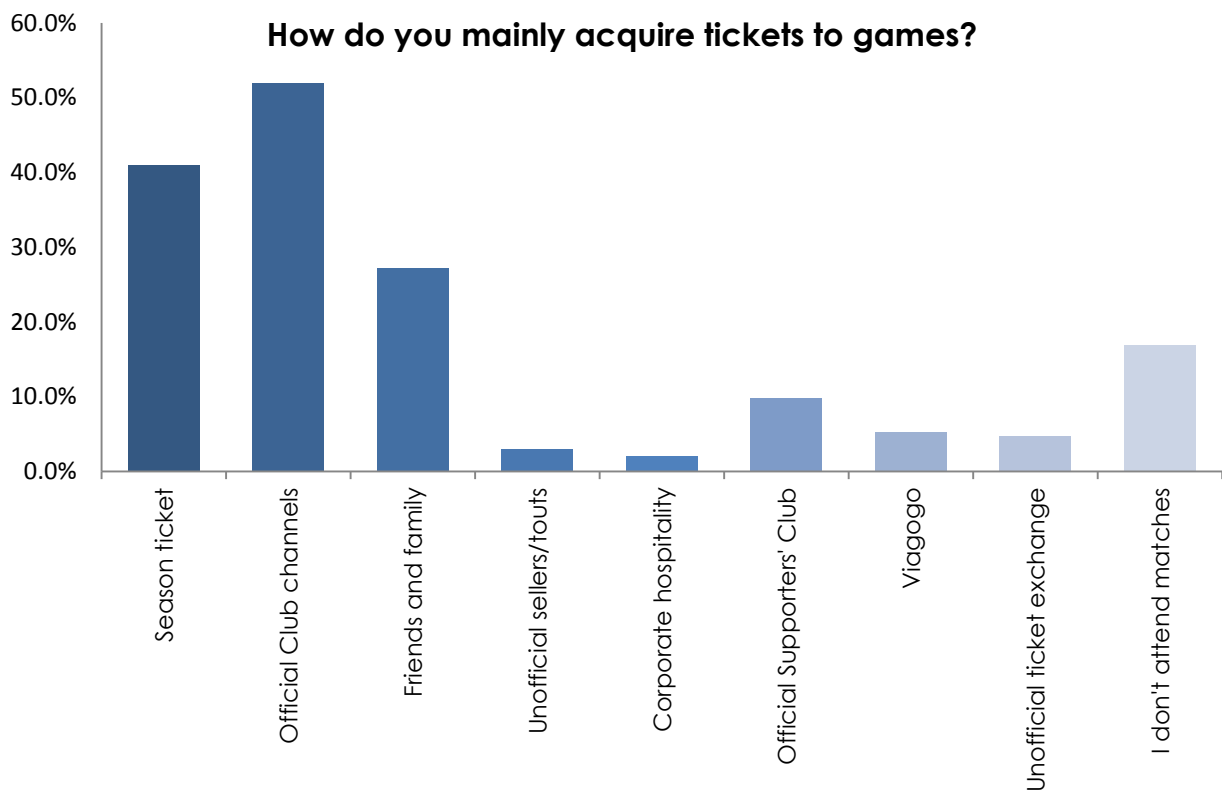
Away Ticket Pricing

- There is a consensus that the current situation whereby successful clubs such as Chelsea are charged a premium for away games is at best unfair and, in the case of poor opposition and poor siting of away support, a downright rip off.
- Respondents support the idea of a standardised price for all away supporters, although some feel the Football Supporters' Federation "Twenty is Plenty" campaign is unrealistic for the Premier League.

"Away tickets are disgracefully expensive for the quality of opposition in half empty stadiums"

Access to Tickets

Trust members were asked how they obtained their tickets, selecting all options that applied. Over half purchase their tickets through the club. Purchase through Viagogo and unofficial ticket exchanges are about equal.



Trust 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).

	Average Rating
Home league games	2.79
Away league games	2.55
Domestic cup games	3.01
Home European games	2.95
Junior/Juvenile home availability	2.65
Junior/Juvenile seating options	2.48
Disabled home availability	2.76
Operation of Loyalty Point system	2.42

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

Loyalty points

- Although most agreed that the Loyalty Point system is the best way to allocate tickets fairly, the majority believe it to be seriously flawed both in the way in which loyalty points are allocated and the games for which tickets are sold on a Loyalty Point basis;
- In particular, Trust members are aggrieved that distance, expense and logistics of travelling to a match is not recognised as 'loyalty'. For example, the Club allocating only a single point for European travel, while home games can attract 5 or more points purely because the Club is having difficulty selling tickets.
- Many express an opinion that the Box Office have little understanding or intelligence of 'popular' games and suggest that a start could be made selling all London derby games via the Loyalty Point system.
- 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 period than a single season.

"You take 3 days off work, travel across Europe costing a fortune, & only get 1 loyalty point"

"The box office is totally out of touch with which games are the popular ones ... NO understanding whatsoever of the core support's mind set!"

Concessionary tickets

- There is dissatisfaction that Junior/Juvenile tickets are only available in restricted areas of the ground for League and European games.
- There is frustration with the Club's policy of being unable to upgrade a concession ticket to an adult, resulting in empty seats.

Away game allocation

- Several members complain that allocation of away game tickets to members is too high where the grounds have a low capacity.

- Members also comment on the anomaly whereby away games are sold out quickly to Season Ticket holders, but Members are slow to take their allocation. This is particularly marked where games are sold on a Loyalty Point basis, where often Members require far fewer points (on a pro rata basis) than season ticket holders.

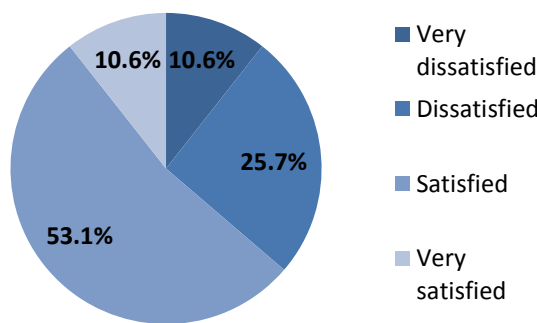
Timing

- The very limited time slots in which to purchase tickets sold on a loyalty point basis are problematic to several members. In general it was noted that the 7am start for ticket sales is inconvenient as this coincides with when people start travelling to work.

Overseas Supporters

There was a mixed response from overseas Trust members with regard to availability of and access to tickets.

If you are an overseas supporter, how satisfied are you with access to tickets?



This probably reflects the diversity of the Trust’s overseas membership which ranges from members of official supporters clubs through to individuals who may never get to Stamford Bridge.

However, some common themes emerged from the comments made by overseas supporters:

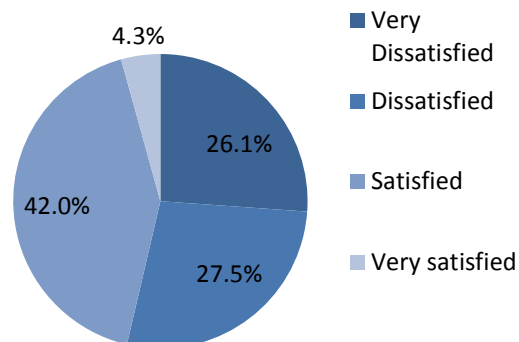
- Obtaining tickets for home games works smoothly for members of supporter clubs, but purchasing and collecting away and European tickets is logistically difficult.
- Many overseas supporters obtain tickets through UK-based friends and family.
- Individuals who have purchased membership find it difficult to plan visits because of the time frames available in which to purchase tickets and dependence on the postage system to receive them in time.
- Many overseas Trust members do not seem to be aware of the existence of official supporter clubs and also find the individual membership system for purchasing tickets difficult to understand.
- Match-goers from overseas feel that they are at a disadvantage with the way in which the Loyalty Point system operates.

Ticket Exchange

"The fees are an insult to my intelligence! Do away with Viagogo and set up an official ticket exchange as part of Chelseafc.com"

"It's potentially a good way to dispose of spare tickets and acquire extras when needed, but I am uncomfortable when I see them selling tickets for certain events at tout pricing"

If you have used the Club's official ticket exchange, operated by Viagogo, how satisfied were you by the service?



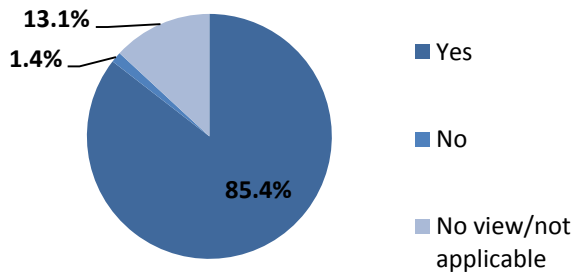
Trust members were asked to comment on the experience and view of Viagogo. The following themes emerged:

- **Ethics**
 - A very high proportion of respondents disapprove strongly of the Club using Viagogo to operate a ticket exchange; the phrase 'legalised touts' was used frequently. Trust members believe that no-one should profit from the exchange of tickets.
 - There is condemnation of the Club for choosing a partner that openly profiteered from the sale of scarce Europa League final tickets at highly inflated prices.
 - It appears that overseas supporters are also able to buy Chelsea match tickets from Viagogo *outside* the official Club exchange; further reinforcing the impression that Chelsea are in partnership with touts;
 - Perceived profiteering by Viagogo chimes badly when it is well-known that supporters selling on their tickets at face value have been arrested for touting.
- **Service**

Experience of service is mixed. While many stated they had received excellent service, there were complaints about tickets remaining unsold when Viagogo site stated there were none available for the game, late payment and contact options.
- **Fees**

Irrespective of the moral issue, both buyers and sellers believe that the fees charged by Viagogo are far too high.

Would you be interested in a non-profit ticket exchange, backed by the Club?



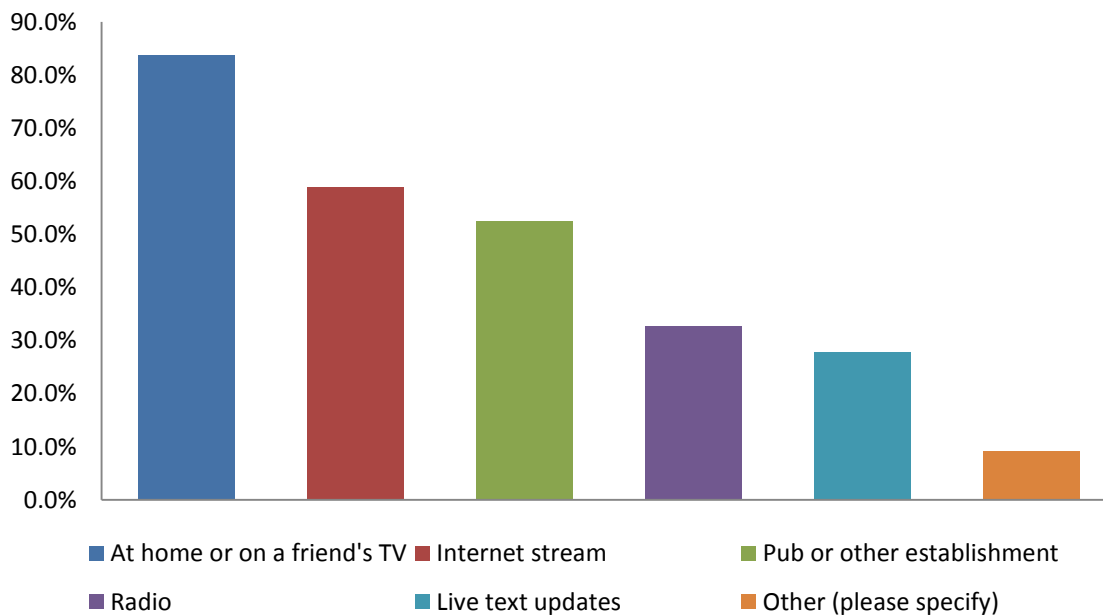
Despite only around 10% and 5% respectively of Trust members using unofficial ticket exchanges and Viagogo to acquire tickets, a sizeable majority would like to be able to avail themselves of an officially backed non-profit-making ticket exchange where Season Ticket seats could be bought and sold for single games at face value.

Members used the comments in this section of the survey to give their views on touts. There was an overarching perception that not enough was being done to prevent commercial touting of tickets while supporters who wished to sell on to other supporters at face value were too often an easy target.

Non-matchgoing support

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

If you do not attend games, how do you follow the match?



The most predominant answer to the **Other** category was via social media, mainly Twitter.

ATMOSPHERE

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

	Average Rating
Atmosphere at home games	2.27
Atmosphere at away games	3.52
Stewarding at Stamford Bridge	2.78
Stewarding at away games	2.73
Siting of away supporters at Stamford Bridge	2.41

Trust members were asked where they thought away supporters should be housed at Stamford Bridge. The top three suggestions in order of preference were:

- East Upper
- Shed (retaining the *status quo*)
- East Lower

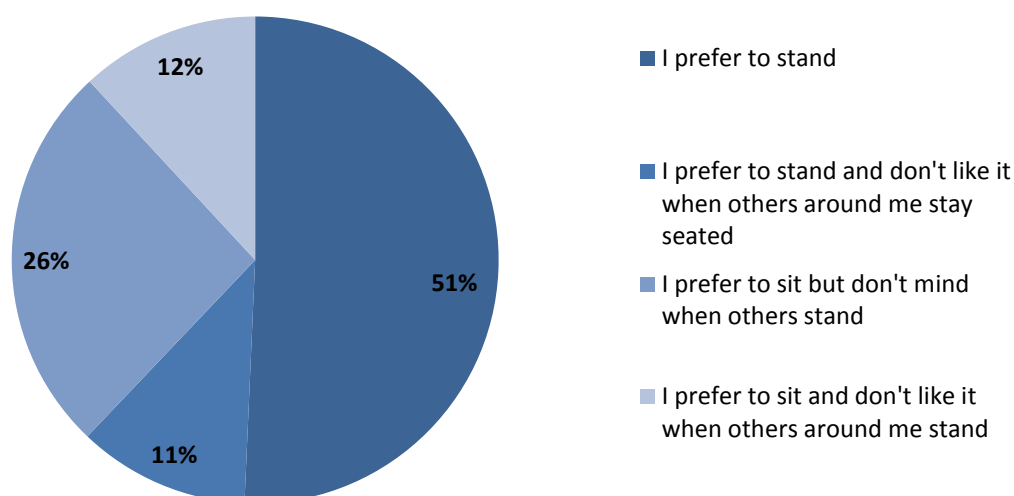
Trust members were invited to suggest ways in which the atmosphere at Stamford Bridge could be improved. The most frequent suggestions (in order of popularity) were:

- Safe standing area(s)
- Reduction in ticket prices
- Segregating tourists from the main support and/or reducing number of tourist packages sold
- Extending the capacity of the ground
- Choice of manager/management stability.

Standing

Amongst Trust members there is a majority in favour of standing at football grounds. Those in favour believe that it improves the atmosphere at the game. In general, those that do not like others around them standing are those that take children to games.

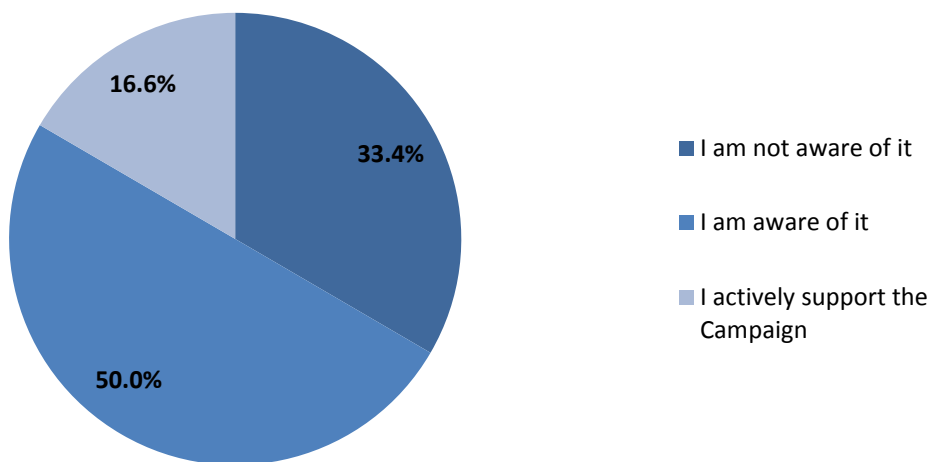
What is your attitude to standing at football grounds?



A majority of members are aware of the Football Supporters' Federation Safe Standing campaign, with around 16% actively involved in promoting it.

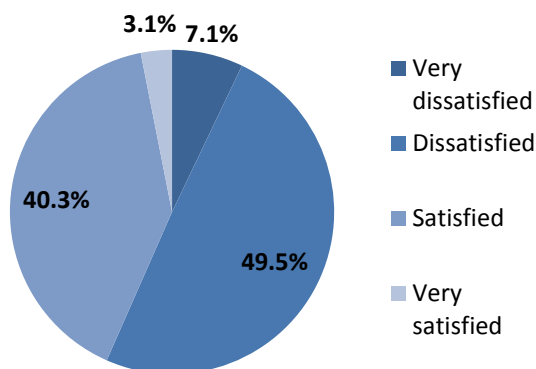
"The introduction of safe standing would mean the most vocal fans could congregate together and the tourists could sit quietly and take photos from the comfort of their own seated quiet zone"

Are you aware of the Football Supporters' Federation (FSF) Safe Standing Campaign



FOOTBALL PERFORMANCE

How satisfied are you with Chelsea's on-field performance in the 2012/13 season?



A majority of Trust members were dissatisfied with overall on field performance last season.

The most frequent reason cited for dissatisfaction was the appointment of Rafael Benitez, particularly when combined with the sacking of an extremely popular manager with strong Club connections

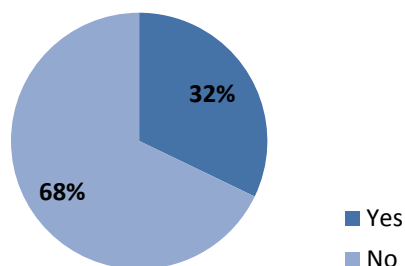
Most expressed satisfaction (and surprise) at winning the Europa Cup despite the disrupted season.

"Apart from sacking a Chelsea Legend and replacing him with the worst option possible the actual performances against (QPR/ Swansea/ Southampton/Reading/Newcastle etc.) were so poor the generally good end of season cannot mask the many failings of the season"

"We are not at the level of recent seasons, however I do not consider football to be about just winning trophies. We have arrived at the end of the season with much to play for and have played some wonderful football at times".

"Champions League football obtained and a trophy with a team in transition of both manager and players, this could have been worse."

Have your feelings about the current season affected your decision to purchase tickets to games or renew your season ticket?



Approximately one third of eligible Trust members say that their future purchasing decisions have been affected by their overall impression of last season.

Members were asked to indicate their agreement with a series of statements concerning the on field performance and strategy. The higher the rating (maximum 4) the greater the agreement:

	Agreement Rating
I want to see a manager given time to implement a plan with the team	3.61
I want to see more players progress from the Academy to the first team	3.54
I want to see the team playing attractive and entertaining football	3.23
Winning trophies every season is the most important thing for me	2.47

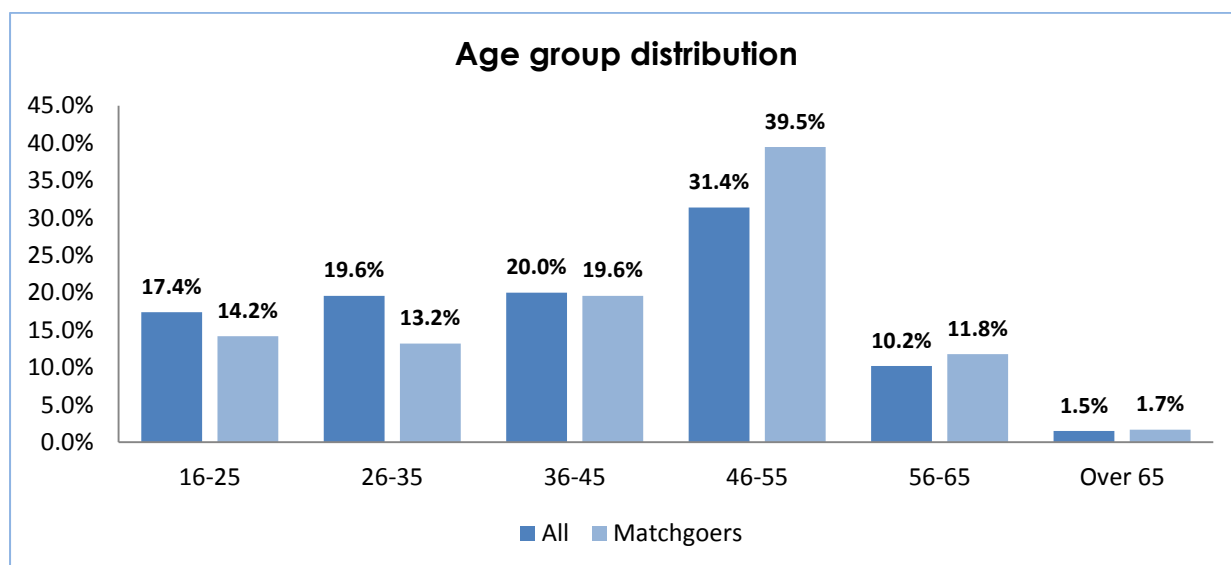
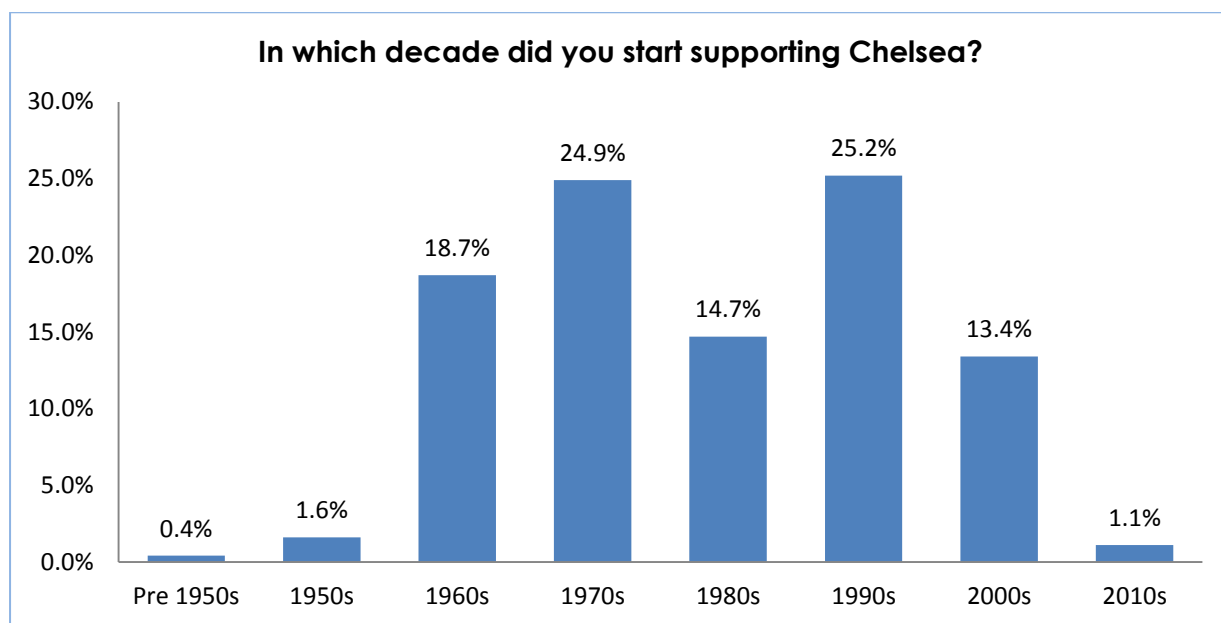
ABOUT THE SURVEY

Reach and response

The survey was conducted during May 2013 and was designed with the aim of identifying the issues that Chelsea supporters care about. It sent out to Trust members (registered up to 29 May). The overall response rate was 61%.

Demographics

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



Match-goers defined as those that described themselves as either 'Season Ticket holder' or 'Club Member – regular match-goer'.

