



FAN SURVEY

2019

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INTRODUCTION

A record 4,302 people completed our sixth annual survey, making it comfortably the largest survey of fan opinion carried out at Spurs. The data we have compiled over those six years is invaluable in helping us to assess the strength and depth of fan opinion and to understand how trends work.

We kept as many of our established questions as we could, in order to help us benchmark responses. We introduced questions around the new stadium and dropped a number of questions about fan experience at Wembley, as there is no need to follow up on those now we are back home.

The survey was made freely available on the Survey Monkey platform and was open from 19 June until 26 June 2019. Of the total number of respondents, 56% were Club Season Ticket holders, 29% One Hotspur or One Hotspur + members, 10% non-members, 3% Premium Season Ticket holders and 2% were 1882 Season Ticket holders.

Most of those who responded (67%), were between 25 and 55 years old, with the vast majority (93%) male.

We also found that most of the Season Ticket holders and members who responded (54%) had been to between 5 and 19 home games during the 2018/19 season. Interestingly, though, the largest groups of respondents had been to either more than 20 games (20%) or fewer than 4 games (26%).



SEASON TICKETS AND MEMBERSHIPS

We asked how satisfied Season Ticket holders, One Hotspur and One Hotspur+ members were with ticket pricing for league games at both Wembley and the new stadium, for away league games, for domestic cup games and for European games both home and away on a scale ranging from very satisfied to very dissatisfied. The figures below are percentages of those who expressed an opinion.

The greatest satisfaction was registered with ticket pricing at away league games (74%) and away domestic cup games (59%).

The greatest dissatisfaction among those who expressed an opinion was at pricing for the Champions League Final (70%) and at the two Champions League home games at our new stadium thus far (43%).

Pricing for 'home' Champions League ties at Wembley and the new stadium also registered highly in the dissatisfaction stakes, although the 40% expressing dissatisfaction with pricing at Wembley was 3% below the figure for our new stadium.

This goes some way to explaining why 86% of Season Ticket holders want the Club to offer a group stage package for Champions League games again this coming season.

Dissatisfaction levels with booking fees continue to run high at 74%.

The experiences of Season Ticket holders, One Hotspur and One Hotspur+ members are very different and we wanted to find out how a number of issues affected them specifically, so we asked some targeted questions.

SEASON TICKET
HOLDERS WANT
CHAMPIONS LEAGUE
GROUP STAGE
GAMES PACKAGE


86%

CHAMPIONS
LEAGUE
FINAL


70%

TICKET
PRICING
& FEES

BOOKING
FEES


74%

SEASON TICKETS AND MEMBERSHIPS

SEASON TICKET HOLDERS

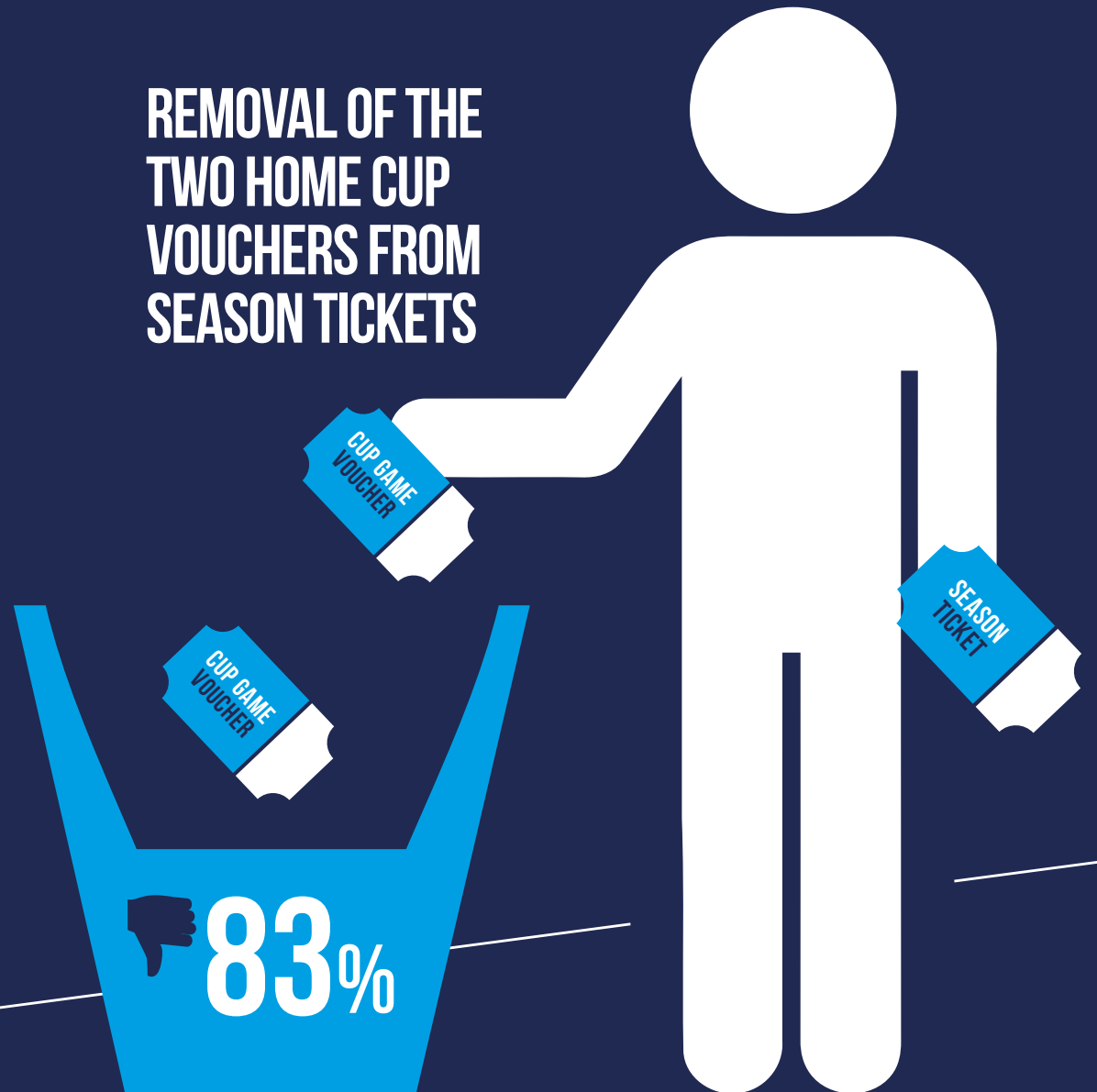
A very high percentage of Season Ticket holders, **80%**, are satisfied with the position of their seat in the new ground. However, **21%** of Season Ticket holders said they would definitely like to move their seat if they could, with a further **30%** saying they probably would. Only **17%** said they definitely would not.

We delved deeper to ask those who said they would want to move why. Not being happy with the view was cited by **39%** of those who said they wanted to move; with **25%** saying they wanted to sit with family and friends and **23%** saying they were not happy with the people around them.

PRICING

We asked how satisfied Season Ticket holders were with ticket pricing on a scale ranging from very satisfied to very dissatisfied. Some **47%** were satisfied, with **30%** not satisfied. The removal of the two home cup vouchers from Season Tickets has left **83%** dissatisfied, with **84%** wanting those games reinstated.

REMOVAL OF THE TWO HOME CUP VOUCHERS FROM SEASON TICKETS



SEASON TICKETS AND MEMBERSHIPS

ONE HOTSPUR MEMBERS

Some **93%** of One Hotspur members who participated in our survey renewed their membership this summer. Of the **7%** who did not renew, **26%** said they could no longer see the benefits, and **21%** said it was because of the cost. A significant **41%** forgot and missed the deadline.

Of those renewing, **51%** said they thought the One Hotspur membership represented value for money, with **37%** disagreeing.

We asked what aspects of membership appealed most, with the following results (respondents were allowed to pick as many reasons as applied); **93%** access to match tickets, **58%** sense of belonging to the club, **36%** access to season ticket waiting list, **18%** gift packs, birthday cards.

We also asked One Hotspur members how likely it was that they would take up a Season Ticket if one were offered this summer, with **42%** saying it was likely they would, and **49%** rating it unlikely. Price was the biggest factor influencing the decision to take up a Season Ticket, with **64%** citing this as a factor, then **48%** saying personal circumstances, **42%** location and **20%** the ability to sit with friends.



**ONE HOTSPUR
MEMBERS TAKING
UP A SEASON
TICKET IF OFFERED**

SEASON TICKETS AND MEMBERSHIPS

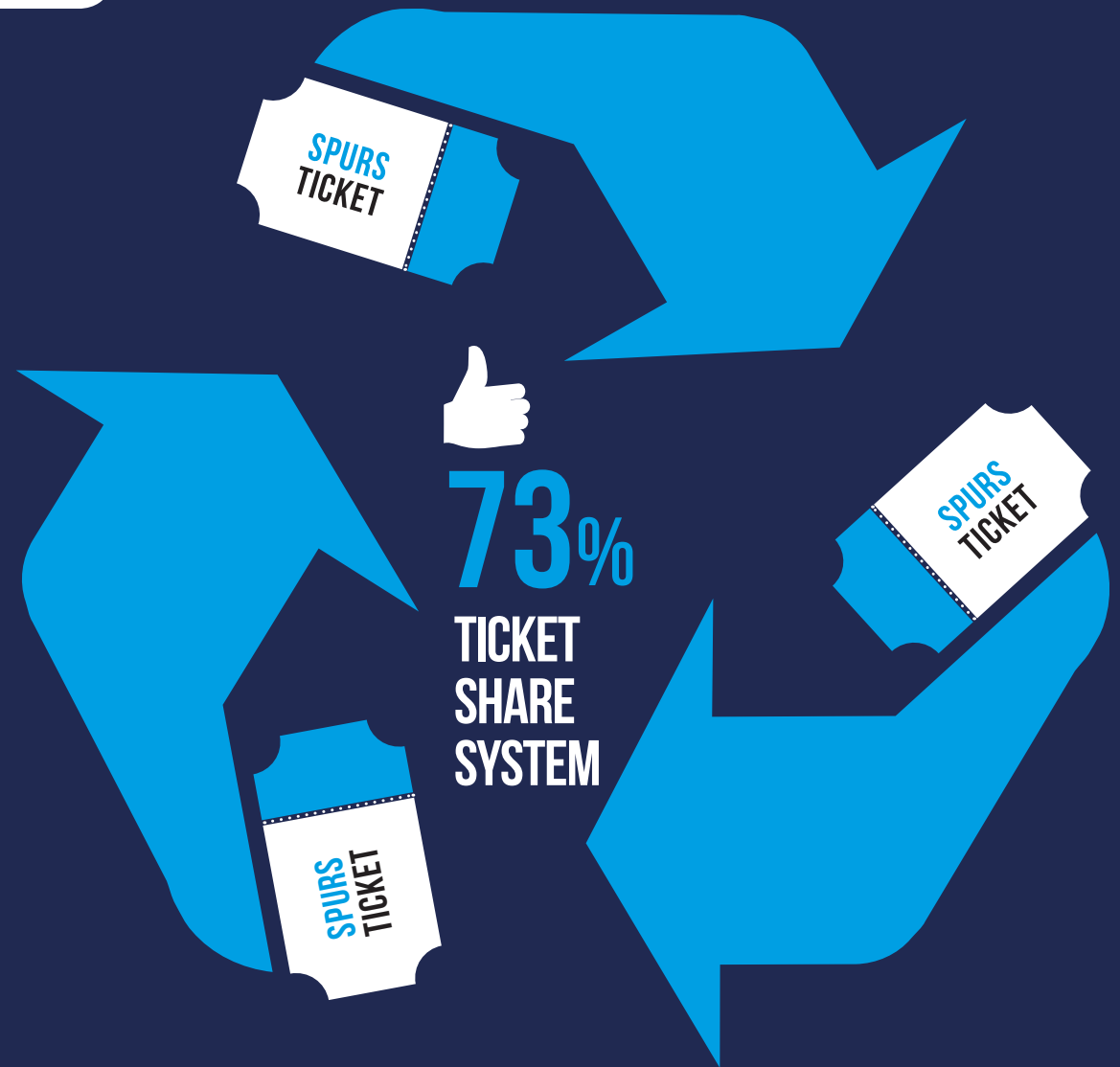
TICKET EXCHANGE, SHARE AND THE APP

As the Club had begun offering the Ticket Exchange option again with the opening of the new stadium, we asked who had used it and how they rated it. Over a quarter, **26%**, of all respondents had already used it, with **73%** of those who had saying they were satisfied.

For the new Ticket Share system, roughly a fifth of respondents had used the platform to either gift or receive a ticket, with **73%** of them satisfied.

The Spurs app is already very popular, with **74%** of respondents saying they had downloaded it.

We also asked for satisfaction ratings with the ticket office and with Ticketmaster, the Club's ticket sales platform. Of those who commented, **58%** said they were satisfied with the interaction with and level of service from the ticket office, with **16%** not and **26%** neutral; while **47%** were dissatisfied with the online booking platform and the process of purchasing match tickets provided by Ticketmaster and just **27%** satisfied.



HOME COMFORTS

Spurs have only played seven games at the new stadium, but we wanted to find out what you thought of it so far. Of those who expressed an opinion, a stunning **95%** said they were satisfied with the fan experience at the new stadium. This compares with a **52%** satisfaction rating for last season at Wembley.

We drilled deeper to ask about particular aspects of the new stadium experience. All figures are from those who responded to the question, not the entire survey, unless otherwise stated.

CROWD MOVEMENT

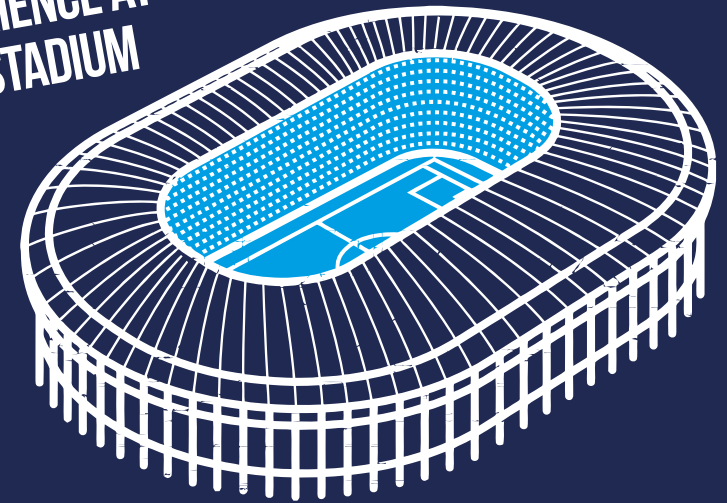
We wanted to find out about the movement and choices fans were making now.

We asked when fans were getting to the stadium, and **61%** said they were inside an hour or more before kick-off, with a staggering **93%** inside more than 30 minutes before.

CATERING

- **80%** satisfied with price of food and drink, **6%** dissatisfied
- **85%** satisfied with the quality of food and drink, **4%** dissatisfied
- **64%** satisfied with the availability of food and drink, **22%** dissatisfied
- **79%** satisfied with the choice of food and drink, **9%** dissatisfied
- **64%** satisfied with the standard of service, **17%** dissatisfied

95% 
SATISFIED WITH THE
FAN EXPERIENCE AT
THE NEW STADIUM



61%
INSIDE AN HOUR
OR MORE BEFORE
KICK-OFF

HOME COMFORTS

STEWARDING AND SECURITY

- **55%** are satisfied with stewarding, **20%** dissatisfied
- **76%** are satisfied with security, **7%** dissatisfied
- **70%** are satisfied with policing, **4%** dissatisfied

On security and policing, the satisfaction rates are roughly the same as last year at Wembley, but there's a noticeable fall in satisfaction with stewarding; the rate last year was **66%** with **15%** dissatisfied.

FOOD AND DRINK

When asked where they planned to eat and drink before and after home games next season, **70%** of survey respondents said "Inside the stadium".

We asked what would make people buy more food and drink inside the stadium. We found:

- **49%** said speed of service
- **33%** said lower prices for similar quality
- **29%** said more regular opening of Park Lane Square
- **24%** said wider range of food and drink
- **23%** said greater supply of food and drink

Asked where they brought food and drink from, respondents' choices were:

- **69%** touchline grills
- **44%** market place
- **43%** goal line bar
- **35%** feature bars

And **56%** said they'd like to see a second Market Place-type offer in the North Stand.

35%

FEATURE BARS

43%

GOAL LINE BAR

44%

MARKET PLACE

69%

TOUCHLINE GRILLS

**WHERE FOOD
AND DRINK IS
BOUGHT FROM**

HOME COMFORTS

TRANSPORT

We wanted to learn more about patterns of travel to and from home games and so we asked two basic questions for starters.

How are you travelling?

- **59%** by train
- **49%** by tube
- **29%** by car
- **13%** by bus
- **16%** on foot

Which stations have you used?

- **37%** White Hart Lane
- **36%** Seven Sisters
- **22%** Northumberland Park
- **19%** Tottenham Hale
- **3%** Bruce Grove

Of those using the stations regularly, **53%** said they were finding waiting times about average, with **16%** saying above average.

Some **50%** of those using the club's official Big Green Bus service were satisfied with the service, with **21%** not. The free shuttle bus service to and from Wood Green and Alexandra Palace left **84%** of those using it satisfied, with just **5%** dissatisfied.

Finally in this section, we asked for your views on rumoured plans to change the name of White Hart Lane train station to Tottenham Hotspur station. Some **49%** disagreed, **28%** agreed, and **23%** professed themselves indifferent.

STATIONS USED

37%
**WHITE
HART LANE**

36%
**SEVEN
SISTERS**

22%
**NORTHUMBERLAND
PARK**

3%
BRUCE GROVE

19%
**TOTTENHAM
HALE**

MATCH DAY ATMOSPHERE

We found that **84%** of survey respondents who had attended one or more league games at the new stadium were satisfied with the atmosphere, with the figure rising to **98%** for European games.

We asked, as we do every year, about attitudes to visual displays such as tifos and flags:

- **58%** think they help lift the crowd
- **59%** think they make the stadium look more interesting and less sterile

- **15%** think they look artificial and contrived
- **13%** think they make no difference

When we asked how people felt about club-orchestrated displays, using the To Dare Is To Do tifo

displayed before our two home Champions League ties at the new stadium as an example, **88%** said they approved and under **2%** disapproved. Which means a significant number of those who thought visual displays did nothing when asked a general question approved when given a specific example.

We also asked about light shows before the game, and **66%** of respondents said they approved – just **10%** didn't; while **55%** approved of instruments, including a drum, being used at the ground, with **23%** disapproving.



MATCH DAY ATMOSPHERE

STANDING

We asked if you supported standing sections. Some **93%** did, with **57%** of those in support saying they would like to stand themselves, and **36%** of those in support saying they would prefer to sit themselves.

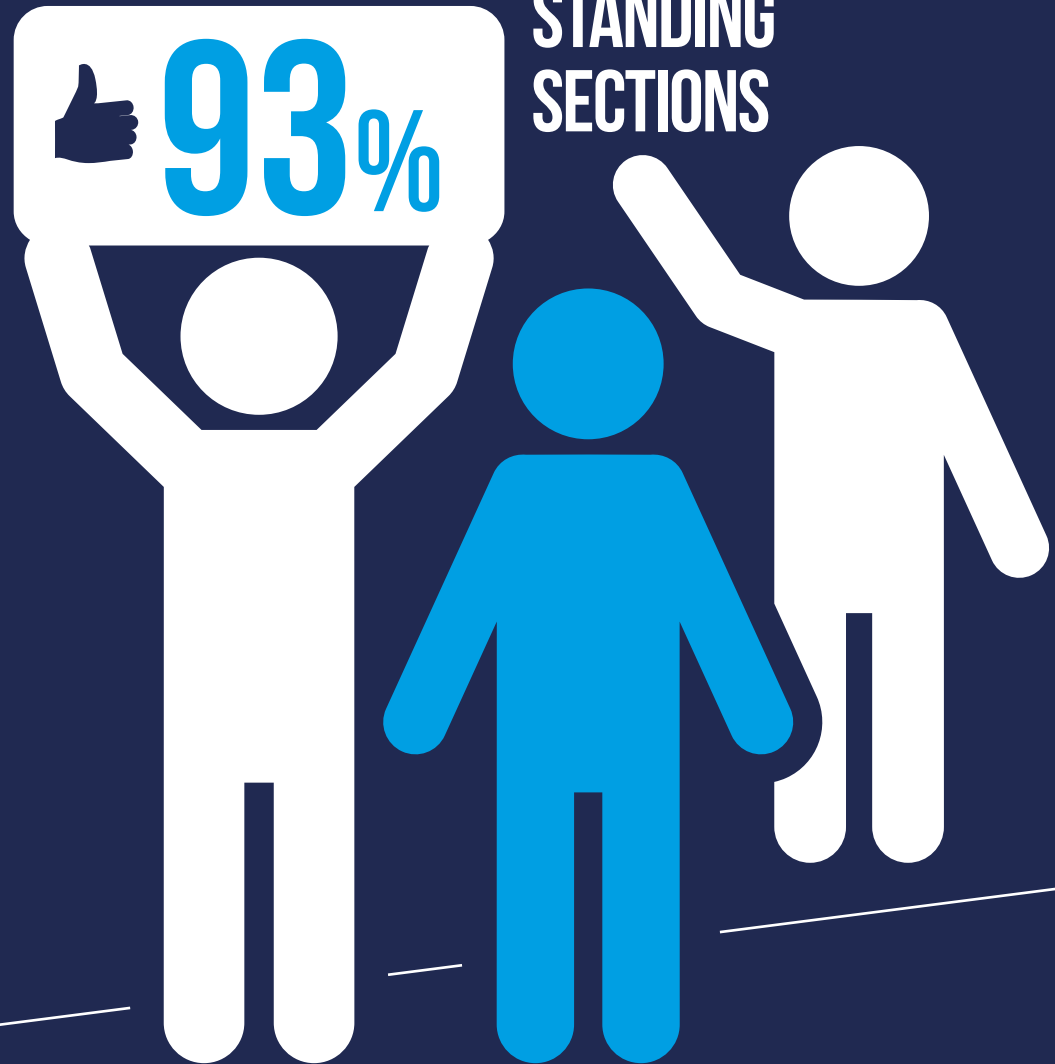
We also wanted to find out fans' understanding of current ground regulations:

- **31%** think standing isn't permitted AT ANY TIME
- **1%** think standing isn't permitted AT MOMENTS OF EXCITEMENT
- **4%** think standing in the AWAY END is permitted
- **7%** admit to being unsure what the ground regs actually say
- **67%** correctly think that PERSISTENT STANDING is not permitted

And we asked if you'd experienced issues with standing at our new stadium:

- **52%** have had no problems with standing at the new stadium
- **10%** have had issues with fans around them as they want to stand
- **11%** have had issues with fans around them as they want to sit
- **17%** like to stand and have had issues with the stewards

SUPPORTED STANDING SECTIONS



PLAYING AWAY

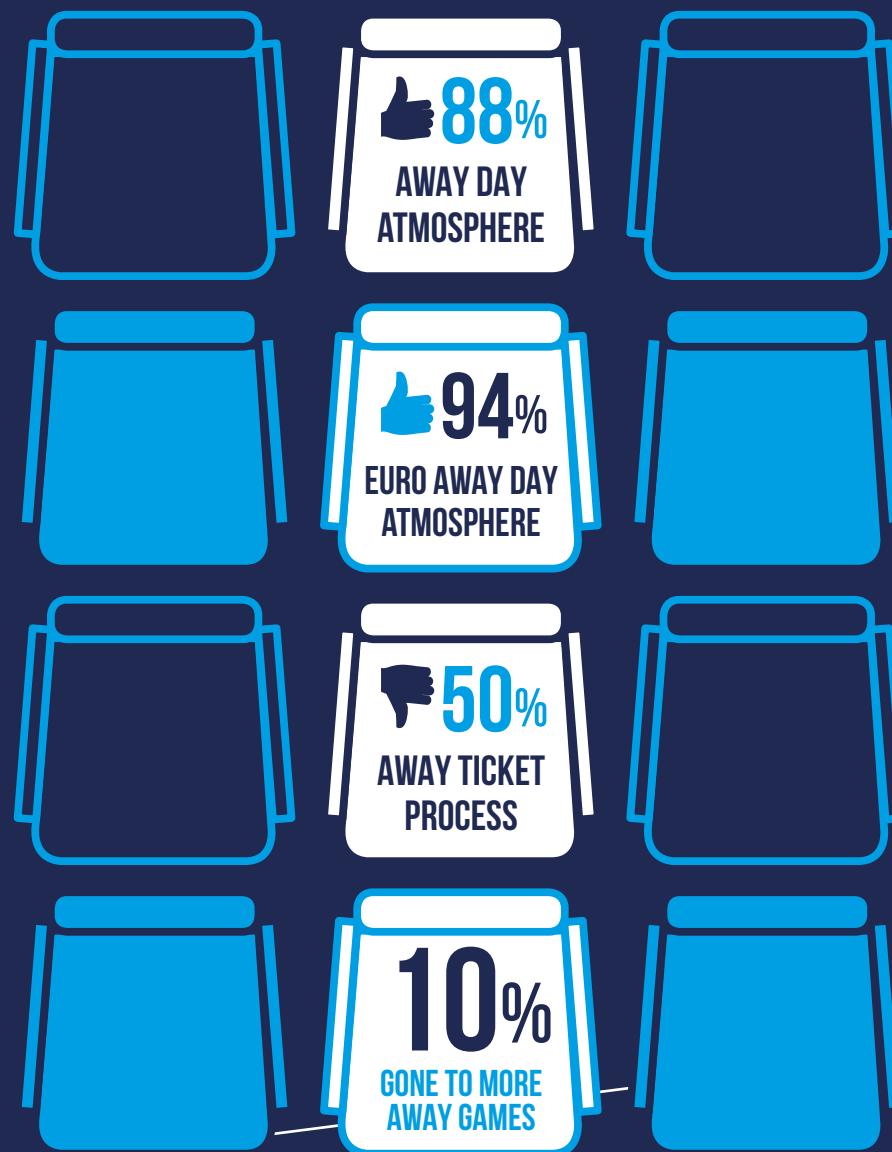
We asked how satisfied fans were with the current away ticket allocation process. Of those who were aware of the process, we found 24% satisfied, 26% neither satisfied nor dissatisfied, 50% dissatisfied, although 80% of respondents had attended either none or a very low number of away games last season.

Some 88% of those who had attended away games in the league said they were satisfied with the atmosphere, with 94% who attended European away games satisfied.

We asked how away game attendance in 2018/19 compared with 2017/18. Of those who'd attended away games, 20% had gone to fewer games, 10% to more and 30% to roughly the same number of matches.

Reasons for going to fewer games were:

- 67% - Ticket availability
- 26% - Time and family commitments
- 20% - Inconvenient time and day
- 17% - Financial constraints
- 3.7% - lack of public transport



PLAYING AWAY

We looked at the factors influencing the decision to apply for away tickets in the Premier League, giving the option to tick as many factors as were relevant. The top 5 were as follows:

- **65%** - Time and day of kick off
- **59%** - Ticket availability
- **58%** - Location
- **39%** - Travel options including cost of travel
- **38%** - Work commitments

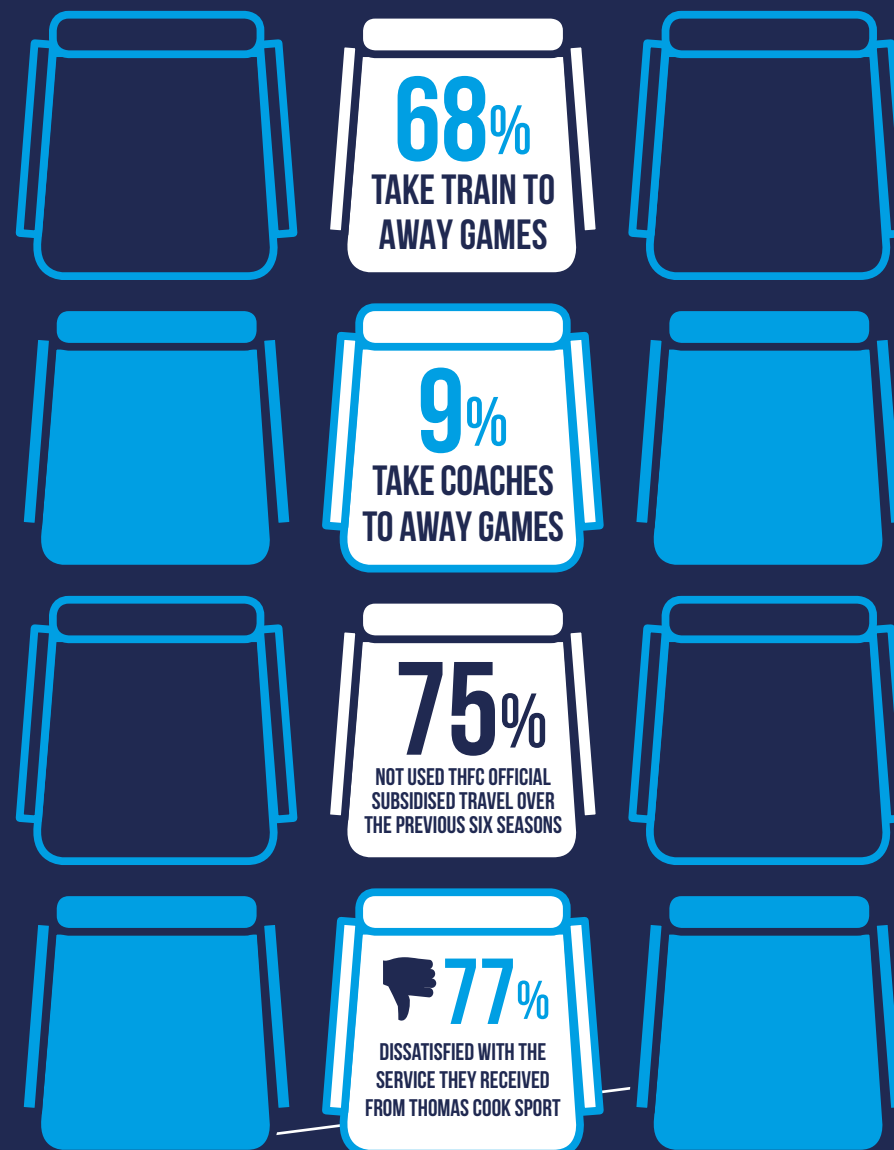
We then asked which factor would most influence the decision to apply for away tickets in the Premier League. The top 5 were as follows:

- **37%** - Ticket availability
- **23%** - Time and day of kick off
- **11%** - Location
- **8%** - Travel options inc cost of travel
- **5%** - Work commitments

We wanted to find out about how people travelled to

away games. The train was the most popular option, with **68%** opting for this mode of transport, followed by car or van on **60%**, **9%** coaches and **6%** planes. Asked if they had used THFC official subsidised travel over the previous six seasons, **75%** said no, while **12%** had used subsidised trains, **11%** subsidised coaches and **6%** subsidised planes. **75%** said they'd like to see the Club continue to offer subsidised travel options.

We asked about attitudes to Thomas Cook Sport. Most respondents, **86%**, had not used them in the season just gone. Of those that had, **77%** were dissatisfied with the service they received. We also asked if fans thought the Club should continue to offer official travel via a travel partner for European away games next season, and **60%** said yes, with only **6%** saying a definite no.

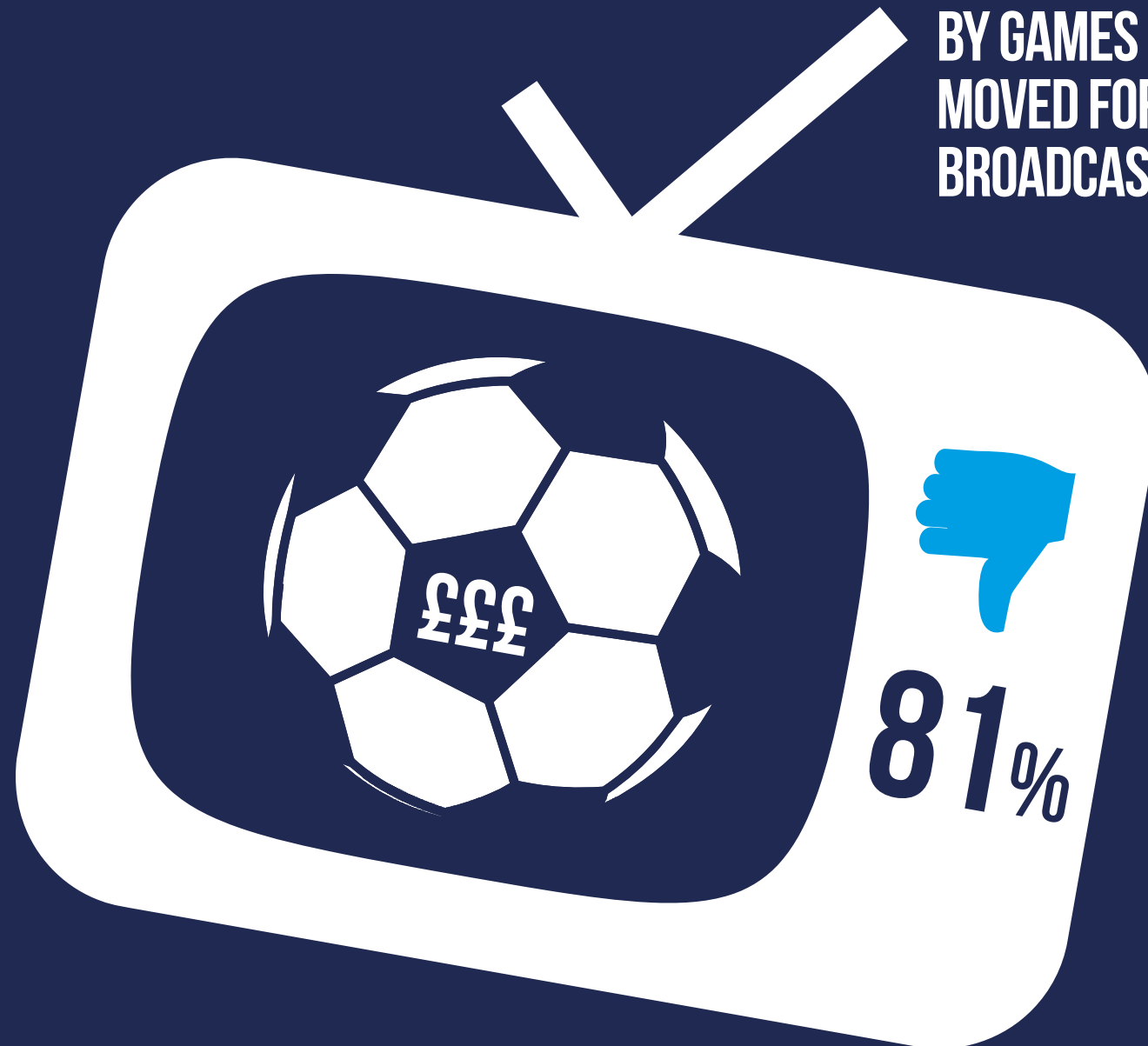


FIXTURES MOVED FOR BROADCAST

Our survey respondents told us **81%** of them had been inconvenienced by games being moved for broadcast.

Some **93%** agreed that more consideration should be given to match going fans when moving matches for TV; **70%** think aligning on sale dates with broadcast pick announcements would help; and only **12%** didn't think a flexible train ticket would make them travel by train more often.

INCONVENIENCED
BY GAMES BEING
MOVED FOR
BROADCAST



FOOTBALL PERFORMANCE

We asked how satisfied fans were with the team's performance on the pitch, along with a few questions about playing priorities.

A total of **92%** were highly satisfied or satisfied with the on-field performance of THFC last season. In order of priority for next season fans said Premier League, Champions League, FA Cup and League Cup, with **81%** putting the PL in top spot, and **5%** the FA Cup. Asked how happy they were with the Club's approach to the domestic cups, **44%** were

either very happy or happy, and **28%** were unhappy with the remainder neutral.

Some **79%** said winning a trophy was either extremely important or very important to them, with a further **18%** saying it was somewhat important. Only **3%** said it was of little or no importance.



PRIORITIES 19/20

92%

HIGHLY SATISFIED OR SATISFIED WITH THE ON-FIELD PERFORMANCE



OWNERSHIP AND GOVERNANCE

We like to know how fans rate the performance of the Club's owners as well as the team. The question drew a high number of individual comments, over 1,000, in the survey but overall **61%** felt ENIC's stewardship had improved over the past year, **29%** felt it had stayed the same and **6%** felt it had declined.

Remembering the survey was carried out in June, only **19%** were satisfied with the Club's transfer policy, with **62%** dissatisfied, and **81%** satisfied with the policy of developing players from the academy.

Asked how confident they were in ENIC's long-term strategy for the club, **46%** said they were confident, with a further **43%** "somewhat confident" and **12%** not confident.



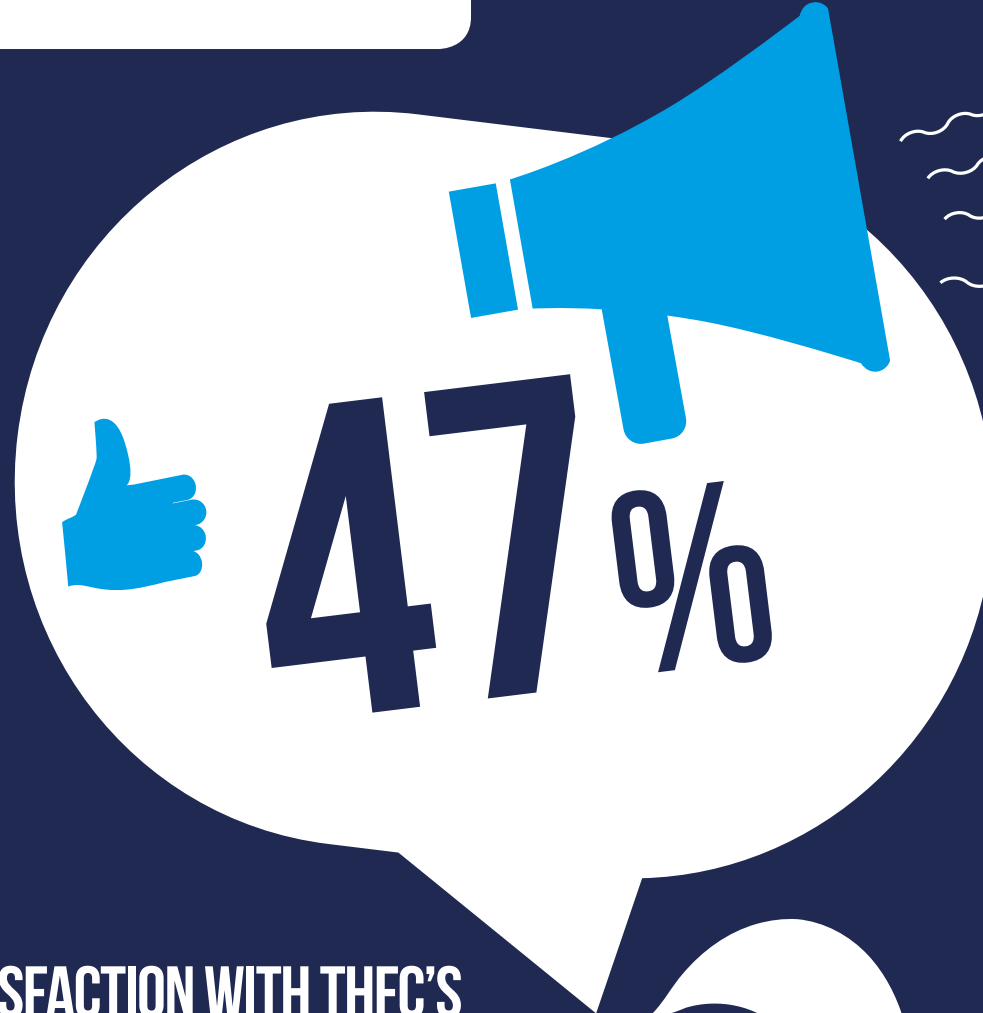
**FELT ENIC'S
STEWARDSHIP HAD
IMPROVED OVER
THE PAST YEAR**

TOGETHER THFC

Satisfaction with THFC's communications with fans runs at 47%, with 24% dissatisfied; 26% think comms have improved since last year, with 52% saying it stayed the same and 15% feeling it has got worse. Some 89% would like to see THFC-run social media customer service and ticketing accounts.

And 91% think an AGM where the Club reported back to fans would or may be useful.

SATISFACTION WITH THFC'S
COMMUNICATIONS WITH
FANS RUNS AT 47%



NATIONAL SUPPORTER ISSUES

We continued to ask fans' opinions on a number of major issues affecting all supporters. We found that **58%** of all survey respondents feel legislation is needed to reform the running of football, and **78%** agreed that football club Boards should have supporter representation. Just **5%** disagreed with supporter representation on club Boards.

Only **14%** were confident VAR would improve fans' experience of the game, with **54%** expressing little or no confidence in it.

On other issues we asked about:

- **96%** think FA Cup Final pricing at up to £145 for general admission tickets is either excessive or high.
- **81%** agree with THST's public position against the European Super League proposals, with **11%** wanting more information and just **3%** disagreeing with us
- **97%** would like to see a price cap for European away games similar to the £30 price cap in the Premier League
- An overwhelming **99%** would like to see more tickets go to fans of competing clubs in UEFA finals

NO GOAL



OFFSIDE



54%

EXPRESSING
LITTLE OR NO
CONFIDENCE
IN VAR

THST — HOW ARE WE DOING?

When looking at the responses from all who took the survey, we found 85% were either satisfied or very satisfied with our work over the past year, with just 1% dissatisfied.

Taking responses solely from THST members, the satisfaction figure increases to **93%**, with just **0.5%** dissatisfied. What's more, **79%** of all respondents felt we'd had at least a moderate amount of success on the issues we've campaigned on this year. That goes up to **88%** when we look at the answers from Trust members only.

We asked respondents to list priorities for the coming season, with the top 5 as follows:

1. Ticket pricing including UEFA competitions
2. Fixture rescheduling for TV
3. Fan/ Club relationship
4. Atmosphere
5. Policing and stewarding

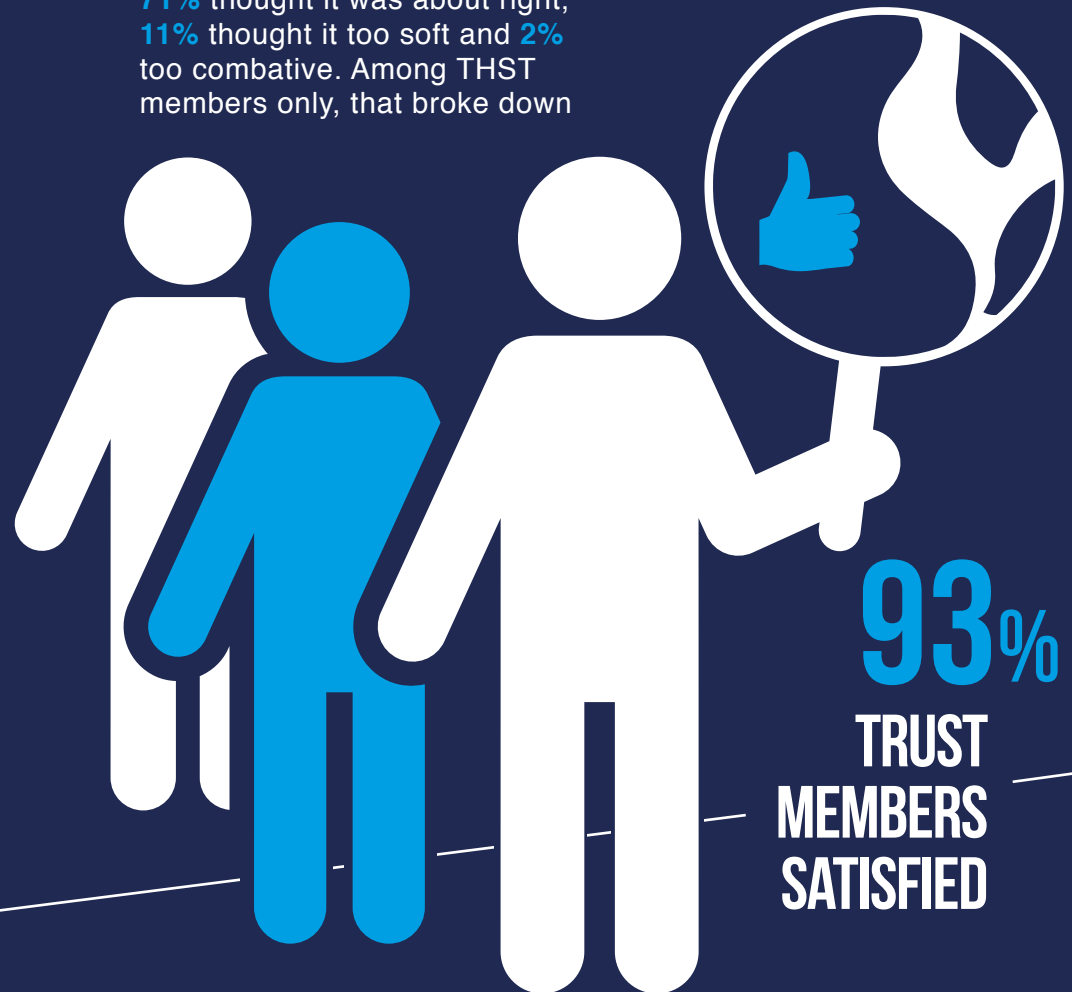
When we filtered the answers to show just what THST members wanted, we found the results were almost identical:

1. Ticket pricing including UEFA competitions
2. Fixture rescheduling for TV
3. Fan/ Club relationship
4. Atmosphere
5. Safe standing

Twitter remains the way in which most fans keep in touch with the Trust, followed by our regular newsletters and then general social media channels.

Finally, we asked fans to rate our approach to our dealings with the Club. This year from the totality of survey respondents, **71%** thought it was about right, **11%** thought it too soft and **2%** too combative. Among THST members only, that broke down

as **80%** saying we got it about right, **10%** saying we were too soft, and **1%** saying we were too combative.



CONCLUSION

Our survey remains the largest regularly conducted survey of Spurs fan opinion and this, along with our ability to compare against data from five previous years, means we can draw conclusions with confidence.

As the largest independent organisation of Spurs fans, it is important that we regularly give members a chance to put forward their opinions and, while we don't claim to represent every opinion of every fan every time, these surveys help us to ensure we get it right for most fans, most of the time. Your help in completing the survey in ever greater numbers is invaluable, and we'd like to thank everyone who took the time to fill in the survey.

This year's survey was especially important after such an eventful season. Moving into the new stadium has inevitably raised all sorts of issues and we wanted to give fans a chance to give initial feedback. Finding that **95%** were so positive about the fan experience at our new ground was something that was both really encouraging and that should make everyone connected with Tottenham Hotspur very proud indeed. Of course, there are still some teething problems and we will be feeding our findings on those back to the Club and looking to work to resolve any issues.

We pass all our findings on to relevant people at the Club, along with all the comments you've taken the time to make. There are a number of areas, especially around ticketing, where the Club needs to take notice of fan opinion and respond more positively than it has. Our survey findings give us a solid basis upon which to press the point.

Finally, we're delighted with the positive response to our work. Our **93%** satisfaction rating among members means we're almost as popular as the new stadium! Thank you for your continued support, and for saying that you thought our approach to the Club was about right.

The issues you want us to focus on in the next year are ticket pricing, fixture rescheduling and the relationship between the Club and the fans – some nice easy targets there, and ones we will be pursuing with vigour.

Our chances of success are greater the more people who join. So please do join by [clicking here](#) or please encourage another fan to join if you are already a member.

THST BOARD
JULY 2019

THANK YOU



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