

## 2012-13 End of season survey

Our end of season survey for 2012-13 was sent to all members of the Black Scarf Movement ("the BSM", also known as Where Has Our Arsenal Gone?). There were 3,471 responses in total; an increase of nearly 50% over our mid-season survey, and we believe this represents the largest published survey response from an Arsenal supporters' group.

The response rate to the survey was more than 74%. We feel this is an outstanding response, and demonstrates the level of passion from BSM members for their club.

The following are the results of the survey.

### About you

1. What type of membership(s) or association do you have with Arsenal?

Shareholder	1.2%
Platinum (Club Level)	0.8%
<b>Gold (Season Ticket holder)</b>	<b>35.4%</b>
Silver	11.8%
Red	32.4%
Cannon Club	2.2%
Junior Gunner	4.2%
Away Scheme	3.4%
Other	8.6%

### Your matchday experience

2. How many matches do you attend at Emirates Stadium each season?

More than 20	23.5%
<b>10 to 20</b>	<b>38.0%</b>
1 to 9	15.9%
None	22.6%

3. If you answered 'None' to Question 2 above, why do you not attend matches at Emirates Stadium?

<b>I find tickets too expensive for the games I want to see</b>	<b>37.6%</b>
I live abroad and don't get the chance	25.5%
Other (please specify)	36.9%

**Comment:** Again, ticket prices were the biggest factor in fans staying away, however this time we gave members the 'Other' option, recognising that there may be alternative reasons as to why they don't attend matches.

There were numerous reasons (some stated below) but by far the most common theme here was that some fans simply don't enjoy the experience of attending home matches any more.

*"Protest at current pricing vs lack of investment in the playing squad"*

*"I don't enjoy the experience in the stadium any more"*

*"The current regime has bred a bitter atmosphere in the stadium with fans fighting among each other. It doesn't have the same 'Arsenal family' feeling as before"*

*"I feel disenfranchised with the Arsenal 'experience' and the direction of the club"*

*"I refuse to give my hard earned money to a club that prefers profits over trophies"*

*"Fed up with lack of investment in squad"*

*"In protest at the Board and general dross in the squad"*

*"Disenchanted with how the club is now run"*

*"Annoyed that MY club now just sees me as a pound sign"*

*"Don't feel the club appreciate the supporters anymore"*

*"The Emirates has become a horrible place full of bickering and it's far too sanitised"*

4. If you used to attend Arsenal matches but no longer do so, what would it take to get you back in the ground on matchdays?

<b>Cheaper tickets</b>	<b>38.6%</b>
Better ticket availability	8.4%
A team challenging for trophies	14.2%
A better atmosphere	22.8%
Other (please specify)	16.0%

**Comment:** Once again cheaper tickets was the most popular answer in this category. In the 'Other' category, the answers were generally based on a combination of cost and matchday experience. Some alternative reasons are listed below:

*"TV has ruined things. More 3pm kick offs would make it easier for most fans"*

*"Not being moaned at by stewards for standing and making noise"*

*"Safe standing"*

*"Being able to sit with others who want to make an intimidating atmosphere"*

*"A crowd less filled with people taking pictures or spending time on their iPad"*

5. This season, how would you rate your overall experience of attending matches at Emirates Stadium? Note this isn't simply based on football; it's the atmosphere, crowd, stewarding, facilities etc. in addition.

Very enjoyable	3.3%
Enjoyable	18.4%
<b>Okay</b>	<b>40.5%</b>
Not that enjoyable	15.4%
Don't like it at all	5.1%
Not applicable	17.3%

6. Would you say the matchday experience has changed at Emirates Stadium since it opened in 2006?

It's got better	18.3%
It's about the same	29.9%
<b>It's got worse</b>	<b>35.6%</b>
Not applicable	16.2%

7. How would you rate the stewarding at Emirates stadium, in terms of knowledge, helpfulness, friendliness etc.?

Very good	10.0%
Good	29.4%
<b>Average</b>	<b>30.9%</b>
Poor	9.7%
Very poor	5.7%
Not applicable	14.3%

8. Given the positioning of our singing section in relation to the away fans, and considering the club publishing a text service where you can report anyone you feel is acting anti-socially, do you feel the atmosphere is affected by things like this?

<b>Yes, it's too sanitised now</b>	<b>68.5%</b>
These don't have an effect on the atmosphere & matchday experience	16.9%
No opinion	14.6%

9. How would you rate the food & drink on offer at Emirates in terms of quality and value for money?

Very good	0.5%
Good	4.6%
Average	17.8%
Poor	27.6%
<b>Very poor</b>	<b>36.7%</b>
Not applicable	12.8%

10. How would you rate the quality of service at the refreshment kiosks on the concourses of Emirates Stadium?

Very good	1.1%
Good	14.1%
Average	16.9%
<b>Poor</b>	<b>35.7%</b>
Very poor	16.2%
Not applicable	16.0%

11. How would you rate the 'Arsenalisation' that's taken place at Emirates Stadium over the past couple of years?

Very good	9.9%
<b>Good</b>	<b>45.6%</b>
Average	25.2%
Poor	8.7%
Very poor	4.0%
No opinion	6.6%

12. We have now completed our 7<sup>th</sup> season at Emirates Stadium, since leaving Highbury. Thinking of your relationship with the club now, do you feel more valued, as valued or less valued by Arsenal?

I feel more valued	2.6%
I feel the same	19.0%
<b>I feel less valued</b>	<b>73.0%</b>
No opinion	5.4%

## Performance on the pitch

13. Overall, how would you rate the performance of the team this season?

Very good	0.2%
Good	12.5%
<b>Average</b>	<b>57.5%</b>
Poor	26.4%
Very Poor	3.4%

**Comment:** Given what many Arsenal fans would see as the bare minimum in terms of aims at the start of each season, achieving another 4<sup>th</sup> place finish was no doubt in minds when judging the performance overall. More or less a 'par' performance from the team, hence 'Average' being the most popular answer here.

14. Who would you choose as your Arsenal Player of the Season?

Wojciech Szczesny	0.0%
Bacary Sagna	0.1%
Carl Jenkinson	0.5%
Per Mertesacker	8.3%
Laurent Koscielny	20.0%
Thomas Vermaelen	0.0%
Kieran Gibbs	0.7%
Aaron Ramsey	2.0%
Mikel Arteta	9.6%
<b>Santi Cazorla</b>	<b>49.0%</b>
Jack Wilshere	1.2%
Tomas Rosicky	0.7%
Abou Diaby	0.0%
Alex Oxlade-Chamberlain	1.0%
Lukas Podolski	0.5%
Olivier Giroud	0.7%
Gervinho	0.0%
Theo Walcott	5.7%

**Comment:** A runaway winner in Santi Cazorla and not too surprising considering the impact he had on the team, and indeed the Premier League last season.

A few comments came in that it was hard to choose as no individual really stood out, but special praise came in for Theo Walcott's contribution, the "commitment and passion" shown by Carl Jenkinson, and Aaron Ramsey's "development and desire in the face of many critics".

15. In our mid-season survey, we asked if you thought Steve Bould would have a positive effect on the team since being promoted to Assistant Manager. Now with a full season under his belt, do you think Steve Bould has had a positive effect working with the team, certainly in the defensive positions at least?

<b>Yes</b>	<b>67.9%</b>
No	16.0%
Don't know	16.1%

16. At the club's AGM in October 2012, Arsene Wenger stated: "For me, there are five 'trophies'. The first is to win the Premier League, the second is to win the Champions League, the third is to qualify for the Champions League, the fourth is to win the FA Cup and the fifth is to win the League Cup" Given our Manager ranks a top 4 finish higher than putting silverware in the club's trophy cabinet and in the record books, which do you value more?

Finishing 2 <sup>nd</sup> , 3 <sup>rd</sup> or 4 <sup>th</sup> and getting the chance to play in the Champions League	28.5%
<b>Winning the FA Cup or the League Cup</b>	<b>66.9%</b>
Other	4.6%

**Comment:** This is always a common question for Arsenal fans, with varying views. However, given that more than two-thirds of respondents value trophies over the 'glamour' and riches brought by the Champions League, this is a good indication of what's more important to football fans.

17. Do you feel that since David Dein left the club, Arsene Wenger has too much control over transfer fees and negotiating player wage levels?

<b>Yes</b>	<b>70.3%</b>
No	10.5%
Don't know	19.2%

18. In January 2013, Arsene Wenger revealed that there is not much of a gap between the lowest and highest paid players at the club. "We pay well. We pay very well. I've spent all my life making sure people who work for us are paid well and I believe if you can do it, you do it." With fringe 1st team players handsomely paid and our key players not too far away in terms of earnings, do you feel this system and wage structure is beneficial to our competitiveness on the pitch?

Yes	7.0%
<b>No</b>	<b>86.8%</b>
Don't know	6.2%

19. Do you feel Arsene Wenger is still the best man for the Manager's job at Arsenal?

<b>Yes</b>	<b>46.0%</b>
No	37.4%
Don't know	16.6%

**Comment:** Without a doubt, the most frequently asked question debated by Arsenal fans and the media over the past year or two.

In our mid-season survey, 46.01% of respondents felt that Arsene Wenger was no longer the best man for the job – a very slender advantage over the 45.92% of respondents who felt he was still the right choice as Manager.

The gap has widened, but this time in favour of Arsene Wenger – with 46% of respondents saying he is indeed the best man for the job. There are obviously more fans now wavering, with over 16% choosing the 'Don't know' category, compared with 8% in our mid-season survey.

## Performance off the pitch

20. Do you feel the current Board is running Arsenal effectively (e.g. achieving financial stability while ensuring the team on the pitch competes for trophies)?

Yes	11.0%
<b>No</b>	<b>84.1%</b>
Don't know	4.9%

21. Do you think Stan Kroenke's majority ownership will be beneficial for Arsenal?

Yes	3.0%
<b>No</b>	<b>87.4%</b>
Don't know	9.6%

22. Do you feel you know what Stan Kroenke's vision for Arsenal is?

Yes	7.7%
<b>No</b>	<b>92.3%</b>

23. Do you feel that the Board members at Arsenal have a good understanding of the feelings and concerns of Arsenal fans?

Board members are completely switched on regarding the feeling among fans	1.9%
Board members more or less understand the feeling among fans	10.6%
<b>Board members are out of touch with the feeling among fans</b>	<b>87.5%</b>

24. Do you feel that the Board of Arsenal has served its time and that a new approach is needed?

<b>Yes</b>	<b>87.2%</b>
No	4.7%
Don't know	8.1%

25. If you feel that new Board members are needed at Arsenal, what would you like them to bring to the Board in terms of experience?

(Respondents could select more than one option)

A knowledge of top-flight football in England	1,933
<b>A link to, or knowledge of Arsenal and its traditions</b>	<b>2,925</b>
Commercial/sponsorship and revenue generating expertise	266
Other	90

**Comment:** The same as the results from our mid-season survey, with the vast majority of respondents wanting Board members at Arsenal who are "football people". Most desirable again was people with a link to or knowledge of Arsenal and its traditions.

From the 'Other' category, comments were received which more or less mirrored these answers. A selection is shown below:

*"Bringing in Arsenal legends who can help with their influence off the pitch"*

*"Football men with an understanding of the game – not driven by greed and profit"*

*"Someone who understands and respects Arsenal fans"*

*"Board members who genuinely listen to fans and don't just pay lip service"*

*"Copy the model in Germany with fan representatives and former legends"*

26. Do you think that with almost 30% ownership of Arsenal, Red & White Holdings should be invited onto the Board?.

<b>Yes</b>	<b>89.3%</b>
No	4.3%
Don't know	6.4%

27. If you answered 'Yes' to Question 26 above, would you like Red & White Holdings to outline their vision for the club BEFORE they become involved at Board level?

<b>Yes</b>	<b>92.9%</b>
No	5.1%
Don't know	2.0%

28. Would you want Red & White Holdings to take complete control of the club?

Yes	32.1%
No	29.9%
<b>Don't know</b>	<b>38.0%</b>

29. Do you feel that Arsenal fans should have a say in how their club is run?

<b>Yes</b>	<b>93.3%</b>
No	4.7%
Don't know	2.0%

30. Outside of our primary commercial partners (currently Emirates and Nike) Arsenal have 11 secondary partners, and now embark on overseas tours in an attempt to generate further income. Taking this into account, how would you rate the performance of Arsenal's commercial team over the past 2-3 years?

Very good	11.4%
Good	34.8%
<b>Average</b>	<b>39.4%</b>
Poor	10.6%
Very Poor	3.8%

31. Are there any further activities you feel our commercial team should be undertaking, to generate more revenue for the club?

Yes	52.3%
No	12.1%
Don't know	35.6%

**Comment:** Many respondents called for the Arsenal commercial team to use Manchester United as the yardstick, while there were over 100 responses calling for Arsenal to tour the USA given the game's ever increasing profile there. Some responses are as follows:

*"I travel to America. People there have heard of Chelsea but not Arsenal. Unacceptable."*

*"Do Arsenal realise how huge the game is becoming in the USA? Why not head this way instead of focusing on the Far East every time?"*

*"Look at Man U for how to do things"*

*"A winning team will make it much easier to attract bigger deals"*

*"Get a sponsor for our training kit"*

*"Manchester United have nearly 40 secondary sponsors compared to our 11. There you go."*

*"Better marketing is needed but it must come off the back of success. The mottos thrown out by the club recently are cringeworthy and mean nothing"*

*"Seek sponsorship of the training ground"*

*"I feel we have had made some better deals lately but always seem to be one step behind our main rivals due to our lack of success and poor vision"*

*"The commercial team would have alot more to work with if we had the top class players & were winning titles and cups"*

*"Relaunch arsenal TV, sponsor our training kit and tour the States"*

32. Given our new deal with Emirates, our rumoured new kit deal with Puma, and the large increase in TV revenue from 2013-14 onwards, do you feel that the club should be doing more to make ticket prices more affordable?

Yes	95.3%
No	2.7%
Don't know	2.0%

**Comment:** Once again a stark reminder that ticket prices at Arsenal are, overall, still too high.

Despite the recent ticketing review which saw price reductions for the games with less demand, prices for the more mouth-watering fixtures went up – as we said at the time, it was a case of the club giving with one hand but snatching back with the other.

While it's obviously a delicate balance for the club to ensure matchday revenues remain at least level, a winning team and bigger names on the pitch could ensure more is done to press the corporate punter and relieve the hardcore Arsenal fan.

The Board would do well to realise that Arsenal fans aren't silly and more often than not will see through spin. Fans see the extra sponsorship money coming in... they hear of a huge increase to revenues from broadcasting... yet there are no real drops in the prices they have to pay.

The message is loud and clear: look after your hardcore support, or the club will suffer in the longer term.

## BSM campaigns and initiatives

33. On a scale of 1 to 5 (1 being lowest score, 5 the top score), rank the following initiatives which we put to the club.

(Average rating from all responses is shown)

A lower-cost 'lite' version of the season ticket just covering league games	4.06
A short-term (3 month: 1 Jun, 1 Jul, 1 Aug) staged repayment scheme for season ticket renewals	4.04
The ability for season ticket holders to downgrade to Silver membership if they choose to give up their season ticket	4.04
<b>Introduce season tickets in the Clock End and recreate the atmosphere of the famous old stand at Highbury</b>	<b>4.62</b>
Investigate the introduction of safe standing areas at Emirates Stadium	4.59
Move away fans to the upper tier, thereby providing more cheaper tickets for Arsenal fans	4.01
Reduce the price of match tickets bearing in mind the club's new sponsorship deals and large uplift in TV revenue from 2013-14 onwards	4.49

Comment: Once again it was encouraging to see that all of our initiatives are popular, all scoring more than 4 out of 5.

However there are two which more and more fans speak to us about and want the club to introduce. That's the reintroduction of the Clock End, and for the club to trial safe standing at Emirates Stadium.

34. Are there any other campaigns or ideas you'd like the BSM to add to the existing list?

Yes	16.8%
<b>No</b>	<b>53.2%</b>
Don't know	30.0%

**Comment:** From respondents who selected 'Yes' to this question, a selection of suggestions:

*"Lower cost of food and drink in the stadium"*

*"Scrap the ridiculous booking fees we have to pay when buying tickets"*

*"Give season ticket holders the option of no membership pack & money off their ticket"*

