



THE BLACK SCARF MOVEMENT

2014 Summer survey

Our 2014 Summer survey was sent to all members of the Black Scarf Movement (“the BSM”). There were 11,543 responses – a response rate of over 61% – and our thanks go those fans who took part.

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)	1.4%
Gold (Season Ticket holder)	34.9%
Silver	15.7%
Red	30.8%
Cannon Club	4.1%
Junior Gunner	2.2%
Away Scheme	3.1%
Other	6.6%

Your matchday experience and relationship with Arsenal

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

More than 20	23.9%
10 to 20	19.1%
1 to 9	36.0%
None	21.0%

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

I find tickets too expensive for the games I want to see	55.2%
I live abroad and don't get the chance	24.7%
Other (please specify)	20.1%

Comment: Again, expensive ticket prices came out top on this question, however, the percentage of people choosing this option jumped by more than 17% compared to our survey last summer.

For those choosing 'Other', below shows a sample of the reasons given:

"Experience is too expensive and like visiting shopping mall"

"I'm a pensioner and prices are far too high"

"Crap atmosphere and over zealous stewarding"

"lack of access to tickets plus pricing structure. Would like to go to safe standing and a bit more singing/banter!"

"Too expensive, and there is no atmosphere because of ridiculously overly PC stewarding"

"Because I don't enjoy an atmosphere that is so far removed from what it should be like at a football match"

"The tickets are too expensive, the atmosphere and the people in the ground is shocking"

"After 22 years as a season ticket holder got fed up of being lied to by Wenger/Gazidis/Kroneke et al"

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?

Cheaper tickets	44.8%
Better ticket availability	11.0%
A team challenging for trophies	8.2%
A better atmosphere	26.3%
Other (please specify)	9.7%

Comment: Stand-out answers here are cheaper tickets (once again the most chosen option), a better matchday atmosphere and better ticket availability. A sample of the 'Other' responses:

"Would go love to go more. We need a greater availability of cheaper tickets (why are there empty seats given the demand to go) and a better atmosphere"

"New owners who care about the club not just money"

"Being able to stand at times without being treated like a criminal"

"Sat 3pm kick offs. plus cheaper cat a games"

5. Last 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	6.1%
Enjoyable	29.3%
Okay	36.1%
Not that enjoyable	3.7%
Don't like it at all	9.3%
Not applicable	15.5%

6. Would you say the matchday experience changed at Emirates Stadium last season, compared to recent years?

It got better	24.7%
It was about the same	47.0%
It got worse	12.8%
Not applicable	15.5%

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

Very good	6.4%
Good	26.2%
Average	34.1%
Poor	10.5%
Very poor	8.3%
Not applicable	15.5%

8. We have now completed our 8th 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	3.1%
I feel the same	22.4%
I feel less valued	68.2%
No opinion	6.3%

Comment: A reduction in the percentage since last year, but worryingly more than two-thirds of supporters still feel less valued by the club since we moved stadium. We feel that more effort is needed from the club in proving that it truly listens to, and takes note of the feeling among fans.

Performance on the pitch

9. Overall, how would you rate the performance of the team last season?

Very good	5.7%
Good	62.8%
Average	28.8%
Poor	2.4%
Very Poor	0.3%

10. In last year's end of season survey, most respondents said they valued winning the FA Cup or League Cup more than a top four finish with no silverware. Given that we won the FA Cup in May and the celebrations that followed, it's clear that hundreds of thousands of Gooners love the winning feeling. But if you had to choose now, which would you prefer?

Finishing 2 nd , 3 rd or 4 th and getting the chance to play in the Champions League	30.2%
Winning the FA Cup or the League Cup	62.8%
No opinion	7.0%

Comment: Once again the vast majority of respondents prefer real-life trophies over the club securing Champions League football. Again, we feel this is a good indication as to what's most important for football fans.

11. This summer, Arsene Wenger ended speculation about his future at the club by signing a new three year contract. What are your thoughts on this new deal?

It's the right deal – he deserved three or more years in charge	22.5%
He deserved a new deal, but two years maximum	29.1%
He should have been offered a one year rolling contract	29.6%
He shouldn't have been offered a new contract	16.5%
No opinion	2.3%

Comment: It's difficult to think of one person in the club's history who has divided our fanbase so much, and the responses to this question back that up. Keenly contested, it demonstrates that the vast majority of fans are still behind the manager, although most feel that a 3 year contract is too long.

12. Given the end to last season and our movements already in this summer's transfer window, feeling among fans is very positive. That said, where do you think we'll finish in the Premier League this coming season?

1st	9.7%
2nd	18.8%
3rd	26.3%
4th	41.5%
5th	2.8%
6th	0.7%
Below 6th	0.2%

How the club is run

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

Yes	4.4%
No	76.8%
Don't know	18.8%

Comment: Once again our majority shareholder doesn't fare too well based on the responses to this question. More than three quarters of respondents still show caution and a potential lack of trust towards Stan Kroenke.

14. Last season, Stan Kroenke appointed his son Josh to the Board at Arsenal. Do you think this will be a beneficial move for the club?

Yes	3.1%
No	73.7%
Don't know	23.2%

15. 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	1.0%
Board members more or less understand the feeling among fans	11.3%
Board members are out of touch with the feeling among fans	87.7%

Comment: Again, the vast majority of respondents feel that the Board is out of touch with the feeling among fans. As a group our opinion is that this feeling would change significantly if supporters felt that the club listened to, understood, and acted positively to fan opinions.

16. Do you feel that new faces are needed on the Board at Arsenal?

Yes	93.9%
No	1.2%
Don't know	4.9%

17. 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	4,238
A link to, or knowledge of Arsenal and its traditions	9,003
Commercial/sponsorship and revenue generating expertise	3,662
Other	102

Comment: The same result as our survey last summer, with most respondents wanting Board members who have links to the playing side of the game. Most desirable again was people with a link to or knowledge of Arsenal and its traditions.

From the 'Other' category, a selection of responses:

"We have the ability to be a real super club and we are already ahead of the rest with the building of the Emirates, We should have people of all the above experience on the board but we need real footballing men on there with understanding of our club and competing at the top"

"A mixture of football and business people...similar model to Ajax and Bayern"

"I think we already have directors who have commercial experience and are suited, however I feel we need a prominent director who is a local and arsenal through and through"

"must be a fan. really get in touch with supporters, interest in their needs and desires, and ticket prices"

18. Arsenal has various channels of dialogue and interaction with supporters, be it through supporters' groups, the 'Arsenal fans forum' or meetings and special event invites for key bloggers. What are your thoughts on how this is handled by the club?

The club is doing the right thing	16.6%
The club could handle this better	63.0%
No opinion	20.4%

19. If you answered "The club could handle this better" to the question above, please let us know how you think the Arsenal would benefit most from dialogue with its supporters.

Below is a sample of the responses received:

"Stop buttering up the bloggers/twitterati. They don't represent me or a majority of fans I speak to. I pay lots of money for my season ticket but I don't get to go to kit launches or afternoon tea"

"The club need to engage supporters more. There should be regular meetings with a cross section of supporters including those who aren't afraid to be critical or call the club's decisions in to question."

"Why are bloggers so special?? Members day should be for kids not bloggers and 40yr olds. Kids are the future of the club"

"The same faces meet the club just to agree with them and brag they were there"

"It's all the same all the time, there's no real "open" forum it's all choreographed"

"I think it's a superficial exercise in P R. However, all the time we have the existing model of Shareholder ownership, nothing will change. Would prefer the Bundesliga model"

"By dealing with its biggest fan group, the BSM"

"By listening! Arsenal has become too corporate. The disconnect with fans is a worrying trend"

"It hand picks those it wants to include in these events. It needs to be open to all groups"

"If the club were to listen to a wider majority of fans instead of a few key bloggers, they might better understand the true feelings of supporters who feel used and disenfranchised"

"it's clear they find this an irritation, the closure of fanshare is an example of this can't have pesky fans questioning the chairman/owner"

"A survey like this to go out to season ticket holders, silver members, red members. There doesn't seem to be any dialogue re prices and prices are ridiculously high for everything from tickets (ludicrous) food and drink (poor selection crazy prices) to shirt sales"

Ticketing and pricing

20. Do you feel that the club should be doing more to make ticket prices more affordable?

Yes	97.3%
No	1.7%
Don't know	1.0%

21. Despite a huge uplift in revenue for the club, the Arsenal Board chose to apply a 3% rise to ticket prices for the 2014/15 season. Do you think the rise was justified?

Yes	3.1%
No	94.9%
Don't know	2.0%

22. Looking to next summer onwards, would you happily accept an inflationary rise in ticket prices each season?

Yes	2.8%
No	91.8%
Don't know	5.4%

23. Given our FA Cup final and Community Shield ticket allocations of only 25,000 between more than 40,000 season ticket holders (and the wider Arsenal membership), how do you think the club should allocate priority for such games?

The length of time you've held your season ticket	35.8%
The number of away matches you've attended in recent seasons	26.0%
The number of home matches you've attended in recent seasons	22.1%
Other (please specify)	16.1%

Comment: One of those debates where fans can never seem to agree. Most respondents stated it should be based on how long you've held your season ticket – clearly seeing longer term loyalty and financial outlay more worthy than the club's current practice of rewarding fans who have been to away matches in recent years.

Where respondents chose 'Other', below is a sample of the responses:

"The number of matches (both home and away) that you have attended"

"It should favour long term season ticket holders but only if they have been present at more than 85% of home matches. Rewarding someone who has been to a handful of away games over a fan who has laid out tens of thousands of £ over the years is hugely unfair"

"The no of matches attended home & away, away attendance building up a slightly higher credit maybe 1pt per home and 1.5pt per away fixture genuinely attended"

"A certain allocation amount for different memberships"

24. Over the past few years Arsenal has introduced a Ticket Exchange scheme for ticket holders who can no longer attend a home match. This was followed by a 'friends and family' scheme where you can pass your ticket onto a nominated recipient. We're interested in your views on how these schemes are working.

I've used these facilities and am happy with how they're operated	8.1%
I've used these facilities but am not happy with how they're operated	18.7%
I haven't used these facilities	62.5%
No opinion	10.7%

25. If you've not been able to attend a home match but have not used the ticket exchange facilities offered by Arsenal, why is this?

I don't want to pay an administration fee to the club	32.2%
The exchange facility closes too early (should be available closer to the match taking place)	14.3%
I want to be able to sell my ticket whenever, not only when the game sells out	53.5%

Comment: It has often been said that a major issue is the club doesn't keep the facility open long enough, e.g. up to a couple of hours before a match kicks off. However, the majority of respondents to this survey either don't want to have to hand over an administration fee to the club, or they simply want the flexibility of selling on their ticket whenever they want to – not only when advised by the club that they can do so.

A sample of comments to this question are shown below:

"I would rather let a friend / family member have the ticket at no extra cost"

"I just sell my ticket on to friends, why should I pay Arsenal an admin charge?"

"It's much easier just passing it on to my usual contacts"

"Why can we only use the exchange when a certain match sells out – when Arsenal says it's okay?"

The BSM, campaigns and initiatives

26. On a scale of 1 to 5 (1 being the lowest score, 5 the highest score), rank the following initiatives that we've worked on for the benefit of Arsenal fans

(Average rating from all responses is shown)

A lower-cost 'lite' version of the season ticket just covering league games	3.99
A short-term (3 month: 1 Jun, 1 Jul, 1 Aug) staged repayment scheme for season ticket renewals	3.98
The ability for season ticket holders to downgrade to Silver membership if they choose to give up their season ticket	3.96
Introduce season tickets in the Clock End and recreate the atmosphere of the famous old stand at Highbury	4.44
Investigate the introduction of safe standing areas at Emirates Stadium	4.59
Our work with groups from other clubs and our meeting with the FA, which resulted in discounts on away ticket prices	4.62

Comment: Again it's encouraging to see that our campaigns and initiatives are highly rated by Arsenal fans. New to the list this time around was our work with other clubs which secured discounts on away match ticket prices. Although match by match the discount seems small, our work with other supporters' groups across the country resulted in Arsenal having to allocate £600,000 over 3 seasons to help towards the matchday experience for away fans. We see this as just the start – more is to come, as fans from clubs across the country unite.

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

Yes	23.2%
No	67.5%
Don't know	9.3%

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

"have a standing section within a designated seated area. The away fans always stand throughout the game"

"The music in the ground needs changing. If we win the club should play "Good Old Arsenal" first. They could update it with the names of legends. If we win one nil they should play "one nil to the Arsenal" first. I am pleased to hear Elvis the "Wonder Of You" is not played anymore. I like Elvis but it has nothing to do with our club. Songs that get the crowd going should be played before kick off"

"Getting control on the banners that are around the ground, all for the banners - but they are a mess and badly designed. Get them branded hate to say it like Man U - big and bold"

"What happened to the old music we ran out to - Good Old Arsenal and Roll Out the Red Carpet?"

"Move the junior gunners away from the away fans"

"Use a flat rate ticket price and remove the ridiculous category pricing structure. Trying to brag about cheap cat C prices means nothing when cat A prices are through the roof"

28. The image of the BSM has been a hot topic since we formed as a group, and although we've put a lot of work into getting across exactly what we're about, there are still some who see us as anti-Arsenal or are adamant that we have a 'hidden agenda'. It's been commented that the name of the group implies protest and negativity, and holds us back – so we're interested in your views. Do you see the name of the group (and any preconceived image that it projects) as an issue in what we're trying to achieve i.e. a better deal for Arsenal fans?

Yes	31.5%
No	52.1%
Don't know	16.4%

Comment: As a supporters' group we're always interested in the opinions of our members and the wider Arsenal support. We were genuinely interested if the name and/or image of our group is felt to be too negative, as it's been commented that this may be the case.

Here are some of the comments we've received to this question:

"If you don't know the details of the group it can seem so. I would say it's the black"

"I think it's important that there is clear feeling that you want to change the status quo; BSM image reflects this. You question the way the club is being run. Very different from being anti-Arsenal. Keep up the great work"

"I think you guys do a great job, you put yourselves out there for the regular normal football fan, you can't please everyone but most appreciate that you exist"

"The way I perceive the BSM is a loyal fan base who want to provide a fairer platform for the supporters and a better atmosphere for the team"

"Black Scarf is fine. To me it implies you are bolshie enough to demand change...but that doesn't make the group "anti-Arsenal"

"It's a striking image that portrays a strong, forward thinking group. Please don't change it!"

"The title suggests "anti", I know we are not & appreciate the work everybody does for the better of Arsenal fans but personally I feel we need a name that suggests support not anti"

"I back what the BSM stand for 100%. They speak for me as a fan. The name does have connotations of protest and negativity, despite being a force for positive change"

"I think this group keeps all the other light weight groups on their toes & that BSM addresses the core issues which go hidden"

"Black seems negative. The twitter people and comments I always here are that BSM are anti Wenger, which is not true! I feel that always overshadows the real intentions of BSM"

"Only the name - the concept and ideas are excellent"

"Most understand the motives but people may incorrectly associate the group to similar movements at other clubs which are possibly not as positive"

"When people are moaning that the name is too negative they really are clutching at straws"

"I don't see the name as an issue. People should be smart enough to focus on the topics at hand instead"

"The issues around the 'black' wouldn't be there with a better name and more Arsenal colours"

