

**FAN SURVEY**



**SPRING 2019**

# INTRODUCTION



In March 2019 we launched our first annual Fan Survey.  
Over 2,000 Fulham fans took part. Thank you!

We wanted to hear how the fans see both the work of the Club and the Supporters' Trust whilst also trying to gauge how we can best focus our efforts in the year ahead.

Questions for this initial survey focused on

- ✓ **ATTENDANCE AT MATCHES**
- ✓ **TICKET PRICING**
- ✓ **SAFE STANDING**

We were also interested to understand the demographics of Fulham supporters.

The survey was made freely available on the **Survey Monkey** platform, opening on the 13<sup>th</sup> March before closing at 7pm on the 20<sup>th</sup> March 2019.

We advertised via a range of online channels as well as through a more traditional leafleting campaign at a Premier League match.

*Please note that all questions on ticket pricing relate to the 2018-19 Premier League season.*

## SURVEY



**2,291** **RESPONSES**

**59%** **SEASON TICKET HOLDERS**

**21%** **CLUB MEMBERS**

**16%** **FST MEMBERS**

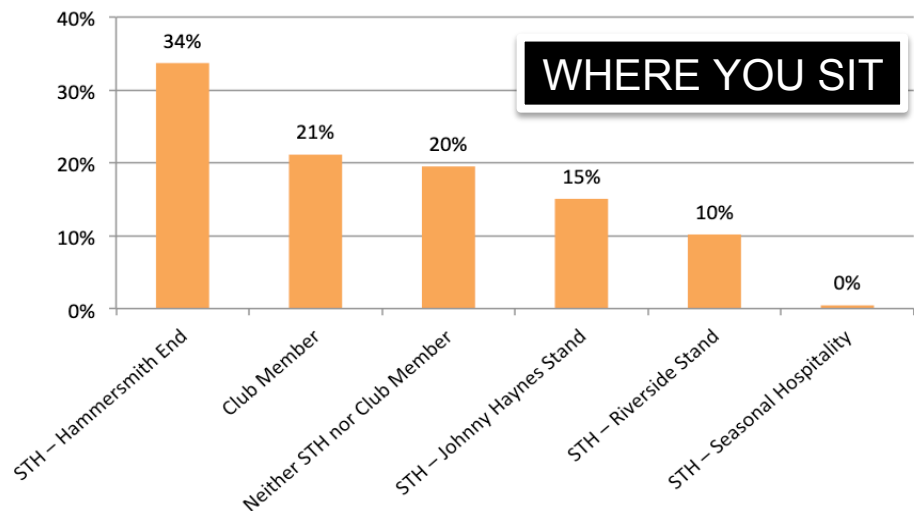
**51%** **FANS FOR 21+ YEARS**

**9%**   **91%**

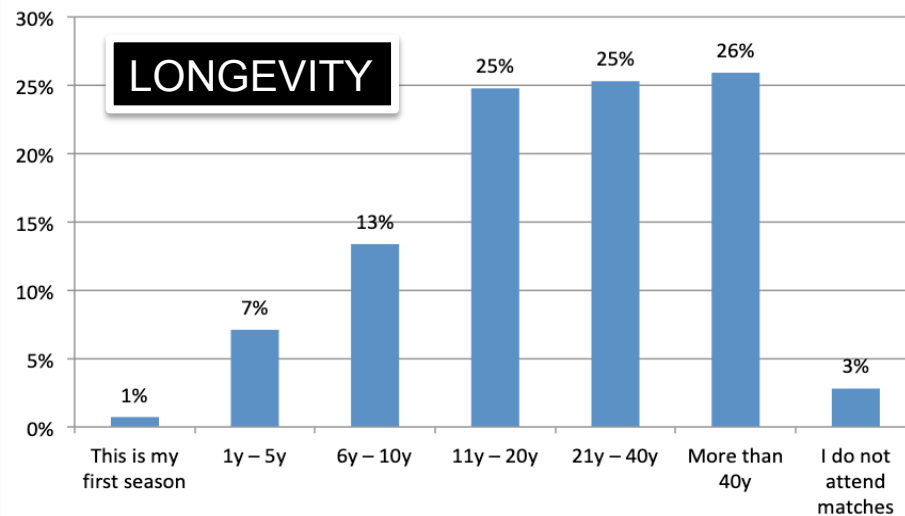
# DEMOGRAPHICS



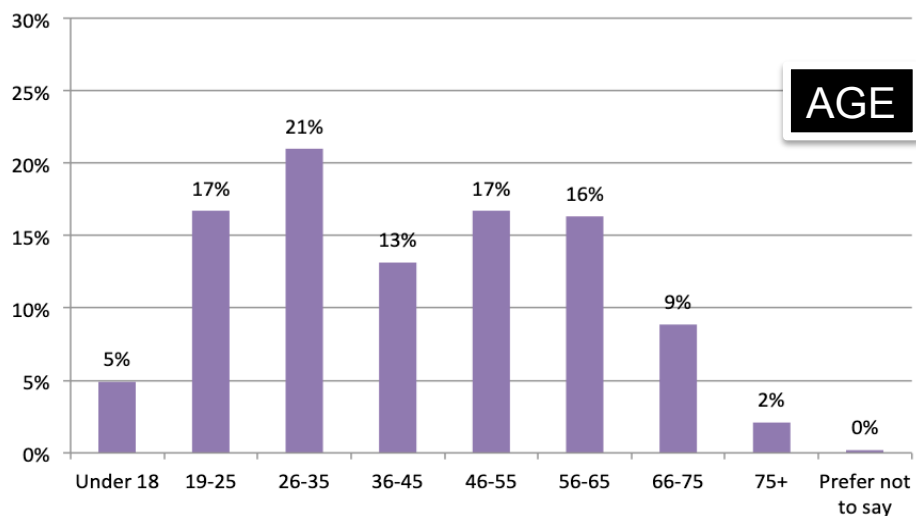
## WHERE YOU SIT



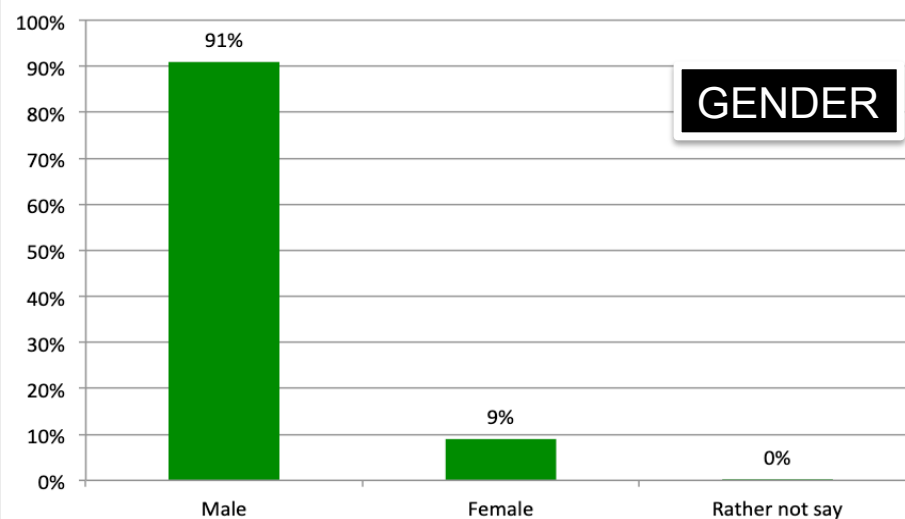
## LONGEVITY



## AGE



## GENDER



# HOME MATCH ATTENDANCE



We asked how often you attend Craven Cottage and also how this compares to the previous season.

We found that **50%** of Fulham fans attend the majority of home matches (more than 15). However **27%** are infrequent attendees.

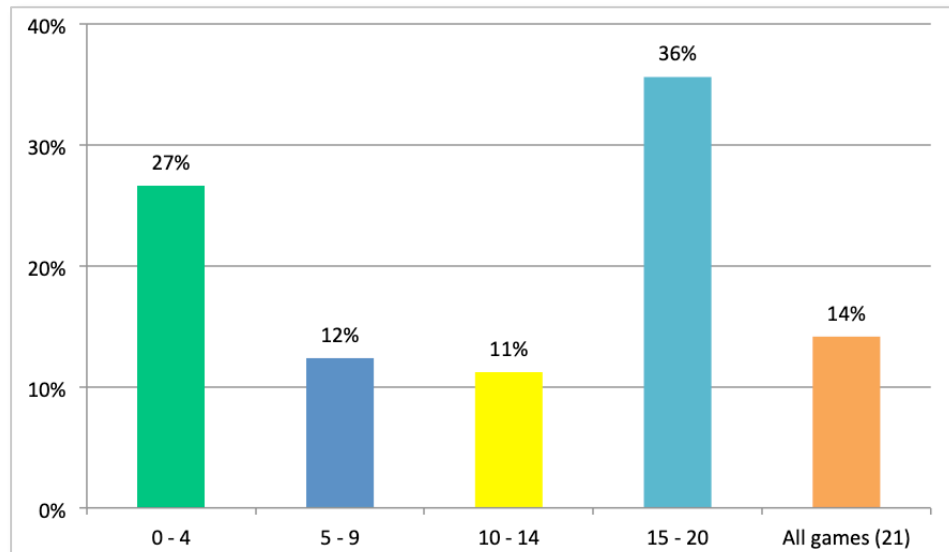
Only **11%** of fans said they were attending a higher proportion of home games than the previous season, whilst **40%** said they expect to attend a smaller proportion.

Of those who expected to attend a smaller proportion of home games, a range of reasons were cited, the three most common being

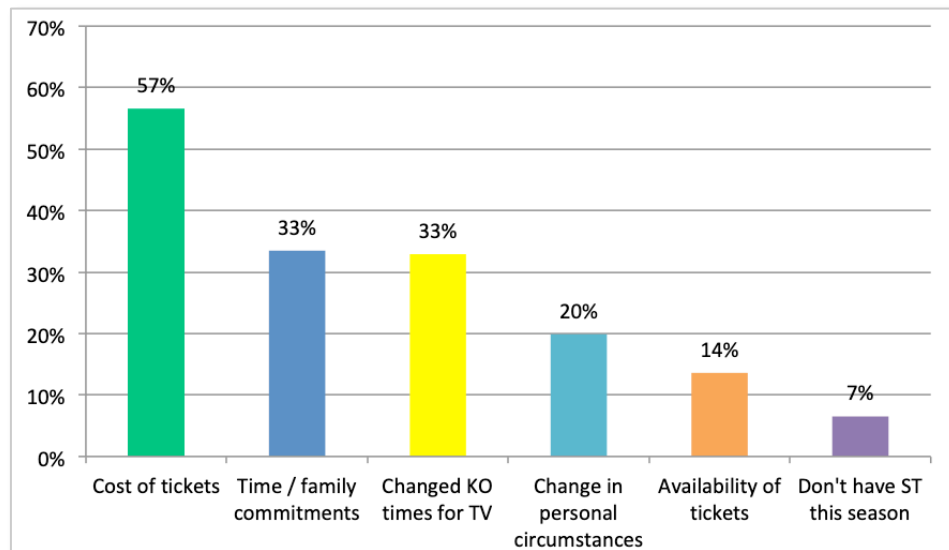
- **Cost of tickets**
- **Time and family commitments**
- **Changed kick-off times**

**57%** of those attending fewer home games said cost of tickets was the main reason.

## HOW OFTEN DO YOU VISIT CRAVEN COTTAGE?



## REASONS FOR ATTENDING FEWER HOME GAMES



# TICKET PRICES



A lot of the communication that we received during the 2018-19 season had ticket prices as a cause for concern.

We wanted to understand more about which groups are affected the most and what the impact has been on them. We were also interested to compare the views of those who purchase a season ticket with those who purchase on a match-by-match basis.

## SEASON TICKET PRICES

We found that Fulham fans are generally satisfied with the price of their season tickets, with only **22%** expressing any dissatisfaction.

With regards to renewals, **54%** said they were likely to renew their season ticket regardless of their knowledge of the next season's pricing with **28%** concerned about price.

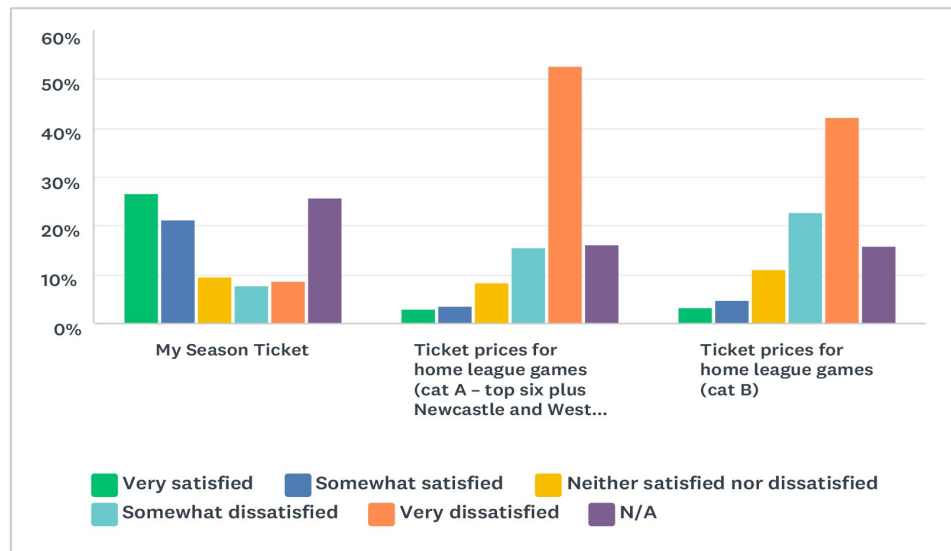
## MATCH BY MATCH PRICES

In contrast with season tickets, there was considerable dissatisfaction with the prices of individual tickets for both category A (**68%**) and category B (**64%**) Premier League matches.

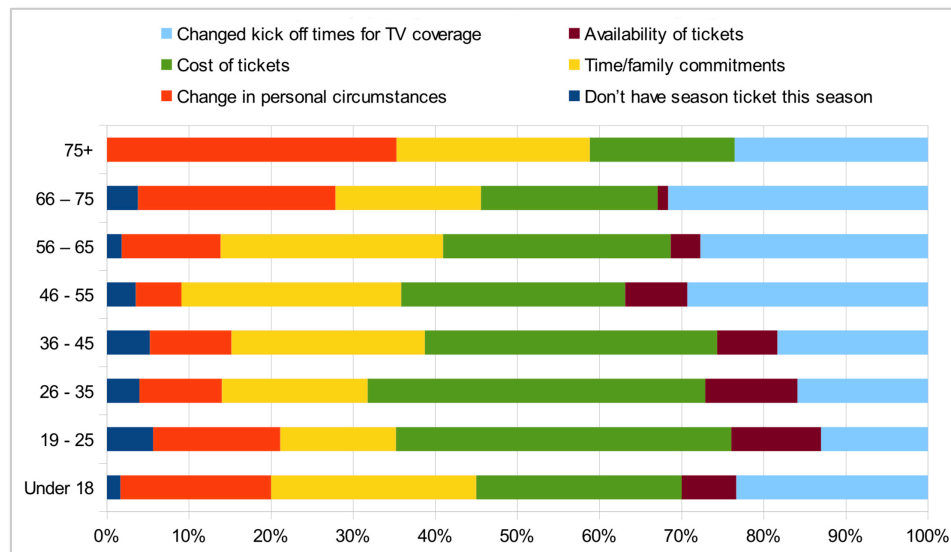
## AGE SENSITIVITY

A key finding was that ticket price sensitivity disproportionately affects the young adult age group of 19-35, with **59%** of those attending fewer games due to ticket prices in this age range. Similarly those expressing season ticket price concerns were largely in this age group.

## SATISFACTION WITH TICKET PRICES



## AGE SENSITIVITY OF TICKET PRICES



# MATCH BY MATCH PRICES



We wanted to know more about the impact the pricing structure had on our matchday attendance and the age groups that find this the biggest issue.

Across all respondents, **64%** of those without a season ticket said that match by match prices caused them to attend fewer matches.

However this rose to **67%** in the 26-35 age group and to **73%** in the under 25s. Conversely in the over 45 age group the level fell significantly to **54%**. This is consistent with the overall finding of price sensitivity in the 19-35 age group.

We asked fans to assess a reasonable price level for both category A and category B Premier League matches for an unrestricted adult ticket behind the goal. From this we were able to calculate an average as follows

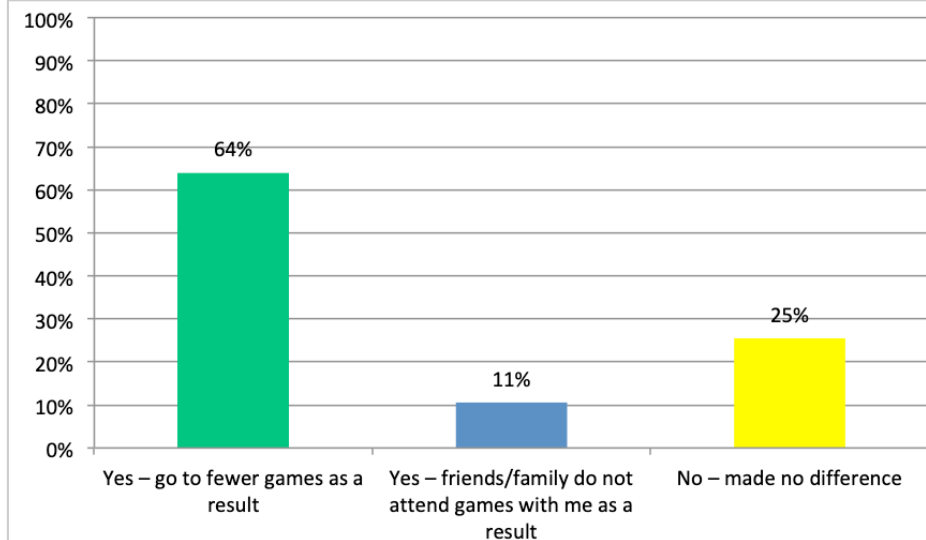
➤ **Category A : £37** (actual price £55)

➤ **Category B : £31** (actual price £45)

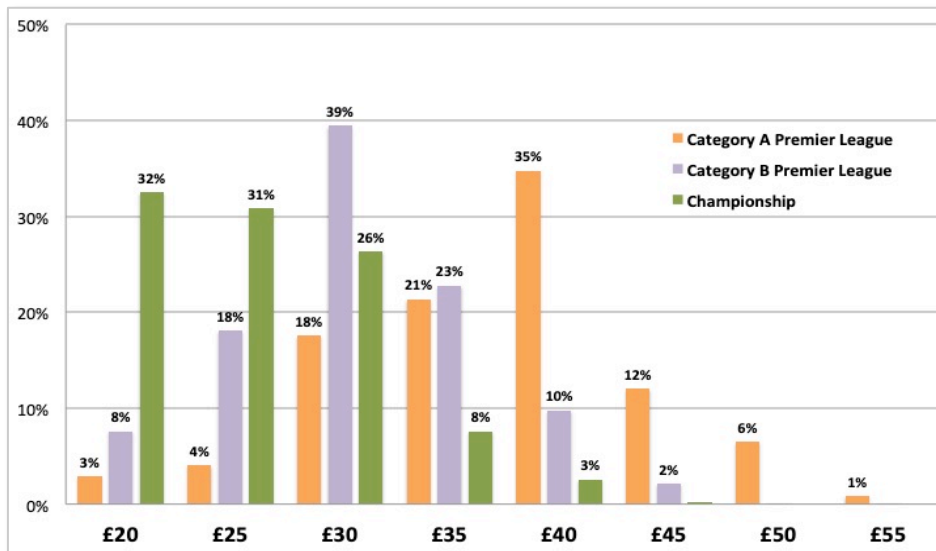
A similar question asked in relationship the Championship gave an average suggested reasonable price of **£26**. The average actual price in the 2017-18 Championship season was **£28**.

Over half of under 25s support a **£20** adult Championship ticket price.

## MATCH PRICES REDUCE ATTENDANCE?



## REASONABLE MATCH TICKET PRICES



# AWAY MATCH ATTENDANCE



We also asked how often you #FollowFulhamAway and how this has changed, if at all, in the Premier League.

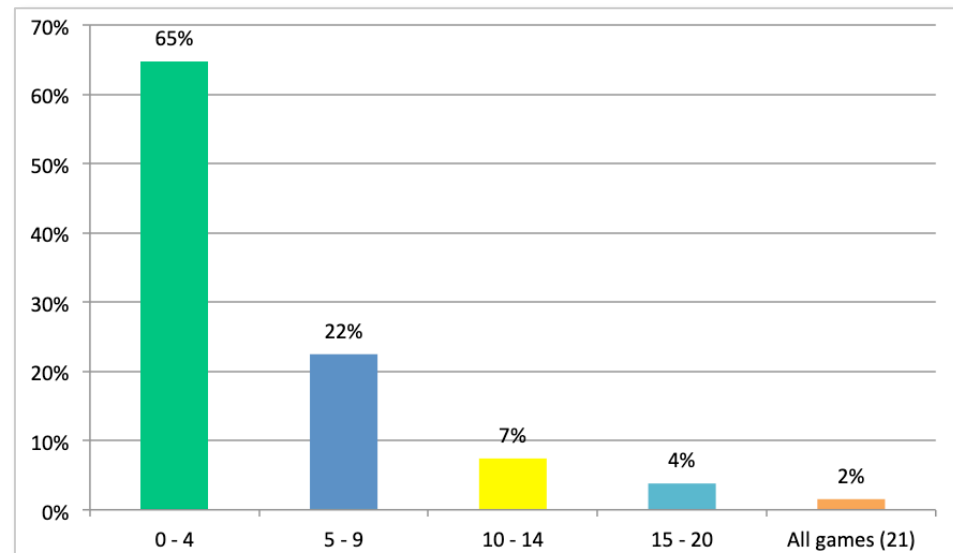
We discovered that **6%** of fans planned to attend more than 15 away games (out of 21) but that only **2%** attend all away games with **65%** attending four or fewer.

Over a third of respondents (**36%**) travelled to fewer games than the previous season with **16%** attending more.

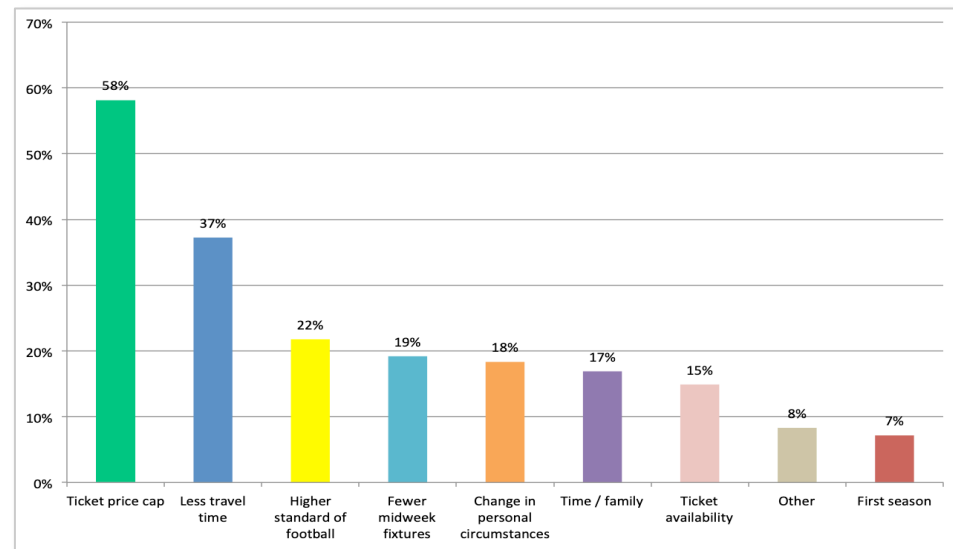
Of those attending more away games, **58%** cited the £30 ticket price cap as a reason. However, of those who attended fewer, the main reasons were family and time commitments (**37%**) and changed kick-off times for television (**34%**).

Over **96%** of fans are in favour of a reciprocal away ticket price cap being introduced in the Championship.

## HOW OFTEN DO YOU TRAVEL AWAY?



## REASONS FOR ATTENDING MORE AWAY GAMES





# SAFE STANDING



We asked for your views on safe standing to find out whether you are in favour and whether you would use it.

Almost **three-quarters** would be in favour of safe standing in one area of Craven Cottage. It is most popular amongst the youngest supporters who were **81%** in favour, dropping to **66%** for those aged 45 and over.

If safe standing meant that sitting in other areas became more strictly enforced, **64%** were still in favour (**58%** of those under 35 agreed, rising to **70%** of those aged 36 and over).

Of those supporting safe standing, **46%** would not choose to stand themselves whilst **41%** would.

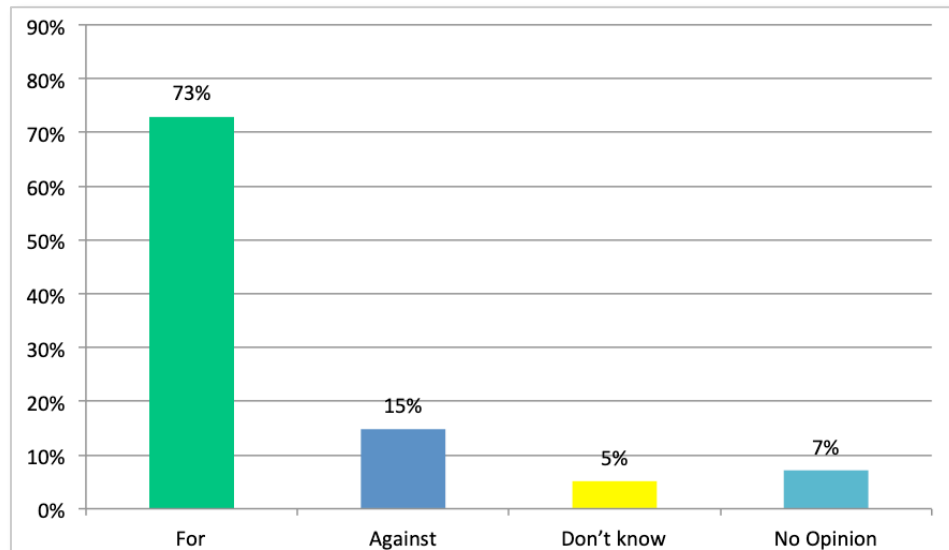
Only **4%** of people said that the introduction of safe-standing would make them likely to attend fewer games.

With regard to pricing, **53%** said the price of a safe standing ticket should be cheaper than a regular seated ticket, whilst **40%** thought that the same price as a seated ticket would be fair.

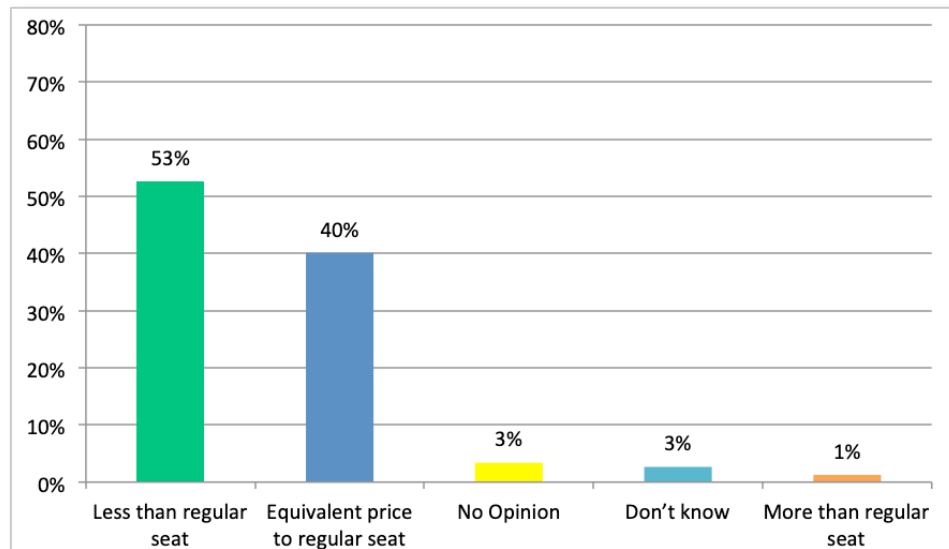
Similar numbers of people thought the next steps should be for the Club to champion safe standing (**36%**) and for the Club and FST to jointly lead a consultation (**35%**).

A significant number of respondents (**70%**) thought the best area for safe standing was at the back of the Hammersmith End.

## VIEWS ON SAFE STANDING



## PRICE OF SAFE STANDING TICKETS





# TO SUMMARISE



**We asked a range of questions and were delighted with a response equivalent to over 10% of our home match attendance.**

**Thank you for contributing. These were the main views of our survey takers.**

- Satisfaction with 2018-19 Premier League season ticket prices was high.
- Those most likely to renew their season tickets regardless of price are in the under 25 and over 45 age brackets.
- There was significant concern over 2018-19 Premier League match by match prices.
- Many fans attended fewer home games in 2018-19 at Craven Cottage than the previous season.
- The majority who attended fewer games said this was due to the increase in match by match ticket prices.
- Price issues are a particular concern in the 19-35 age group but less so in the under 18s and over 35s.
- The average suggested reasonable price of Premier League tickets is £14 to £18 lower than the actual prices.
- The average suggested reasonable price of Championship tickets is only £2 lower than the 2017-18 actual average.
- A small proportion of fans go to the majority of away games but many attend a handful of games.
- The £30 price cap has allowed fans to attend more away games than previously.
- A large majority of fans would support Safe Standing at Craven Cottage.
- The clear favourite location for a Safe Standing area is at the rear of the Hammersmith End.

## **Thank you for taking part in the 2019 Fan Survey**

The results have already been invaluable in supporting discussions with Fulham on the topics covered. They will continue to inform FST decision-making in the next year and we will also use them in wider work with other Supporters' Trusts via the Football Supporters' Association.

Please let us know what you can see in the data and look out for the 2020 survey.

**The full results of the 2019 FST Fan Survey can be found here**

**<http://fulhamsupporterstrust.com/activity/fan-survey-2019-results>**