



Arsenal Supporters' Trust

Membership Survey 2011



Foreword

This is the second annual survey conducted by the Arsenal Supporters' Trust (AST). The survey was sent to all members at the end of the season with all responses received in May and June 2011. The AST would like to thank all our members for completing the survey and giving us a detailed understanding of your views on the key issues at Arsenal Football Club.

The AST would like to thank Mary Maude Research for all its support in preparing, conducting and compiling the results of the survey. It is a thorough reflection of the views of Arsenal fans at a crucial moment in the club's history.

The AST will present the results of the survey to Ivan Gazidis and the other Arsenal Board members and will use the results to guide the development of our policies on the future of the club.

Contents

Section A – About the Respondent, page 3

Section B – Ownership, page 4

Section C – Football Performance, page 9

Section D – Ticketing, page 17

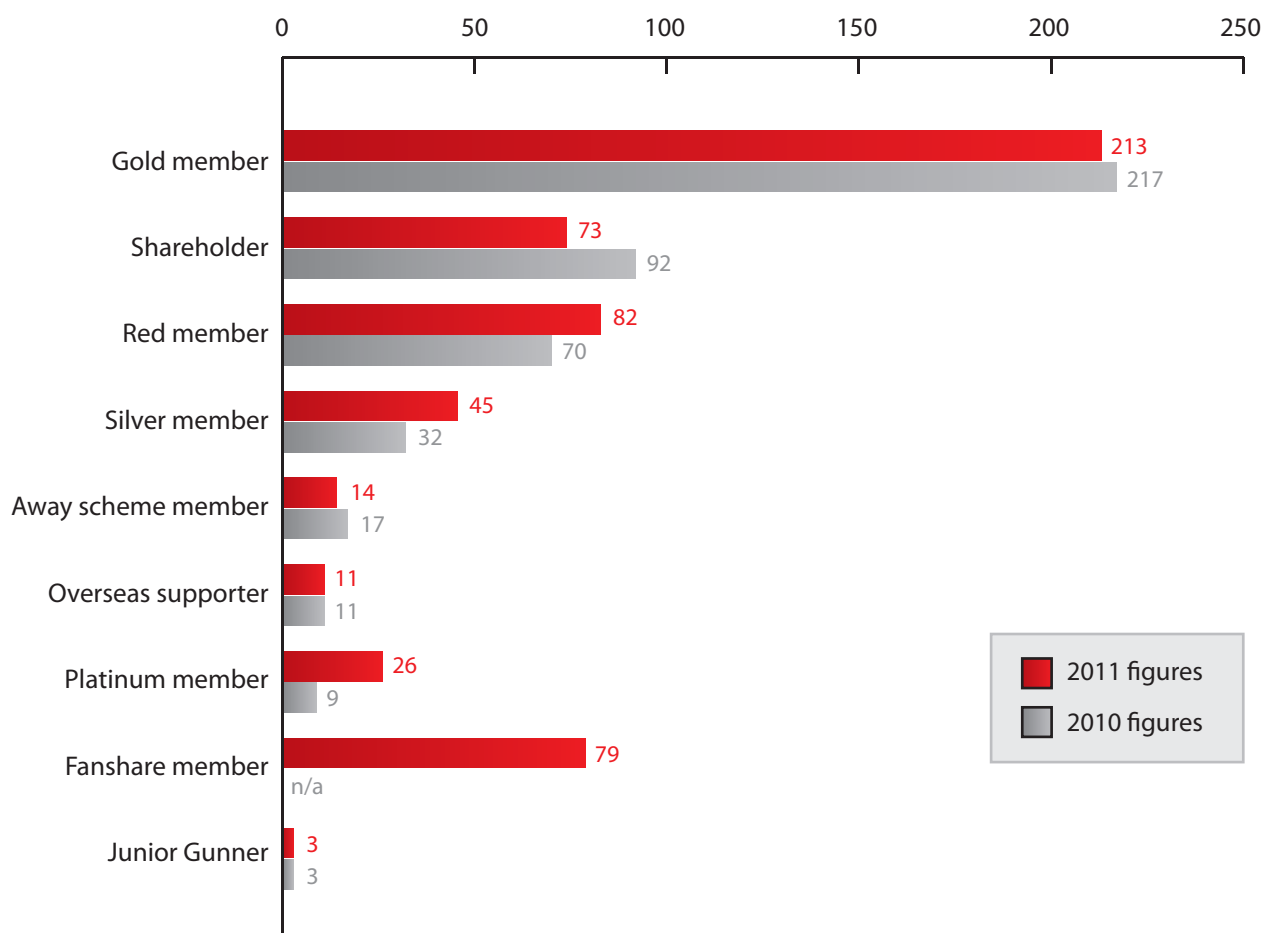
Section E – Sentiment and Expectations, page 23

Appendix – Additional comments by AST members, page 29



Questionnaires were sent to 850 members of the AST and 382 responses were received (350 received in 2010), representing 45 percent of the membership.

Respondents were asked to tick each of the categories that described their relationship with Arsenal. Many fall into more than one category.





Stan Kroenke now has the majority holding in Arsenal Football Club. With this in mind, respondents were asked to rate the importance of the following areas of corporate strategy from 1 to 5, with 5 as highly important.

Custodianship / looking after the long-term future of the club:

1	2	3	4	5
1.6%	1.3%	3%	8%	86%

Accountability and openness to supporters:

1	2	3	4	5
1%	2%	11%	19%	67%

Financial management and enhancing Arsenal's commercial operations:

1	2	3	4	5
0.5%	2.1%	8%	30%	59%

Overseeing the manager and football performance of the club:

1	2	3	4	5
7%	8%	25%	16%	44%

Over a quarter of AST members rated five for all categories. Their numbers are included in those above.

There is a correlation between those who rate overseeing the manager and football performance to be of either no or little importance (one or two) and those who subsequently say they are satisfied with the football performance and optimistic about the future.

The 2010 survey asked respondents if they thought Arsenal was right to remain committed to a self-sustaining model. The results were: 89 percent said yes, 8 percent, no and 3 percent said they were not sure.

This year we asked respondents: as Arsenal is now more than 90 percent owned by two billionaire investors, should continuing to rely on the sustainability model remain a key corporate objective or is there a case for financial investment into the club by its major shareholders?

Retain self-sustaining model:	51%
Investment into club by major shareholders (rights issue or donation):	38%
Don't know:	11%

Most of the 38 percent who consider investment into the club to be the best way forward say that considering the need for squad investment, a one-off or occasional donation could reap financial (and football) rewards in the short to mid-term.



Several respondents put forward the view that there could be mixture of both and that retaining the sustainable model did not necessarily rule out the occasional investment, for a specific reason, by one or other of the owners.

A small investment into the club would be beneficial provided it is used to strengthen the first team squad and subsequently leads to a tangible improvement in performance, and winning trophies

I would like to see a long-term sustainable model at Arsenal with an initial investment from the owners to enable the squad to be strengthened

Respondents were then asked if once the takeover of Arsenal by Stan Kroenke is completed, if they thought that he should make it a priority to continue to support the Arsenal Fanshare scheme and to involve supporter shareholders in Arsenal's ownership arrangements:

Yes: 96%

No: 2%

Don't know: 2%

AST members commented positively on the Fanshare initiative that began during the 2010-11 season. Many respondents expressed encouragement for its retention and continued growth. Some said that Kroenke should make shares available for purchase by the scheme. Others said that Red & White and KSE should agree to keep up a regular flow of shares to Fanshare.

These investors are ultimately transient; fans are permanent so it's vital that they retain a share of the club through Fanshare

AST should seek an agreement from Kroenke and Red & White to drip-feed shares to Fanshare

There may only be 10 percent of shares available at the moment but this must be retained by supporter shareholders and Fanshare

The few respondents who consider he should not make it a priority say that the only immediate priority should be investment in the squad.

The survey also asked if Kroenke should improve his communications with supporters including setting out his ambitions for the club and the strategy he has to achieve them.

Yes: 96%

No: 1%

Don't know: 3%



This question elicited a fair amount of additional comment from respondents, most focussing on the desire for him to communicate something of his rationale and vision for Arsenal. Others expressed concern that although he comes from a sports background, he appears to have little knowledge or understanding of football.

My expectations for Arsenal largely depend on what Kroenke does in the immediate future. It is so uncertain what his motives are – but for sure he's not here for love of Arsenal

It is of utmost importance that the Board and Kroenke develop and maintain a transparent relationship with all Arsenal fans. This should be carried out through the AST and AISA and would lead to mutual trust from all parties

The two main shareholders should work together. Minority shareholders and Fanshare members should be retained and AFC could develop a model of ownership that other clubs would aspire to

Give Kroenke the benefit of the doubt. A 'self-glorifying fan' owner would not be desirable and he seems to have a good track record

In the 2010 survey, respondents were asked if they thought Alisher Usmanov should be invited to join the Board. This year we again asked whether Red & White Holdings should be represented, as owner of 27 percent* of the club.

* The percentage shareholding of Red & White has subsequently risen to 29 percent

2010	Yes:	40%	No:	35%	Don't know:	25%
2011	Yes:	70%	No:	18%	Don't know:	12%

Of those that consider Red & White should be invited to join the Board most commented that, in view of its shareholding size, it has every right to Board representation and that it is vital to retain some plurality in ownership. Some said that to achieve this objective Kroenke should now begin a dialogue with them.

It can't be sustainable for Usmanov to hold 27 percent and not be on the Board

If Kroenke is smart he'll try and get Usmanov (and his money) on the inside rather than out

On balance, I would have preferred Red & White to take over as I believe Usmanov is an Arsenal supporter so his agenda may not be solely based on profit



Several respondents put forward the view that current Directors who no longer hold any shares should either resign or their continued participation be discouraged. Some went further, saying that at the 2011 annual general meeting a motion of no confidence in the Board should be put forward. Some respondents expressed anger that the money Directors had received for their shares would not benefit Arsenal.

Some Board members claim to be custodians of the club but then sell their shares for massive profits

They appear to have been running the club out of self-interest by increasing the value of their shares. None of the £400 million or so that has changed hands has benefited the club. They have betrayed the Arsenal legacy they inherited

A club is not about increasing the wealth of the shareholders. Sadly, the club I grew up with is turning into a money generating machine like Manchester United but without the trophies

Of those who consider that Red & White should not be invited on to the Board, some said that it would cause conflict and could jeopardise the smooth-running of the club. Others pointed out that, whatever the current uncertainties, Arsenal remains an example of a well-run Premier League club.

The question is, if Red & White were on the Board would this be constructive? The signs are that the difference in approach might cause disharmony

Arsenal has been a beacon of good management and common sense in the financial arena of the Premier League and a continued sensible approach to transfer fees and financial management is the most important issue over the next few years

The survey also asked if respondents would support Kroenke paying himself a dividend or extracting management fees from Arsenal:

Yes: 6%

No: 80%

Don't know: 14%



The majority of those who said yes put forward the view that they may support paying a dividend but not management fees.

The final question in the ownership section asked if respondents thought that Kroenke Sports Enterprises (KSE) should be more transparent in how it has raised the finance to purchase Arsenal:

Yes: 78% **No: 13%** **Don't know: 9%**

Many respondents commented that Kroenke and the Board should make a statement stipulating that at no time will any debt be loaded on the club.

Although there is recognition that Kroenke is not obliged to explain how the finance was raised, it would be a welcome gesture, and improve his standing among supporters. A few others made the point that as long as there is no debt on the club it is irrelevant how the finance was raised.

Supporters would be somewhat reassured if Kroenke should commit to not forward-loading the club with any debt

To conform to the 'fit for purpose' initiative, it should be in the public domain how the finance was raised

So long as the finance is not placed on the club's books I am not sure it matters how it was raised



In the 2010 survey, respondents were asked how satisfied they were with the football performance of Arsenal in recent years. The same question was asked again, but with very different results.

2010	Highly satisfied: 10%	Satisfied: 50%	Slightly satisfied: 29%	Unsatisfied: 11%
2011	Highly satisfied: 2%	Satisfied: 22%	Slightly satisfied: 39%	Unsatisfied: 37%

Last year's survey was conducted at the end of what had turned out to be a disappointing season, but most respondents believed then that the weaknesses in the football performance would be addressed during the close season and that several experienced players, including a goalkeeper, would be signed.

It is generally acknowledged that the end of 2010-11 season was equally, if not more, disappointing than the previous one. During the last few weeks the football performance seemed to significantly deteriorate as Arsenal went from a position as a strong contender for the Premier League, to second, to third, and eventually finishing fourth.

The problem is the end of season capitulation has served to undermine the whole season. There needs to be a pride in performance, a more responsible attitude and some leadership on the pitch

However, the lack of satisfaction is not only attributed to the end of the season but also to the lack of consistency throughout the season both at home and away.

Although it is recognised that Arsenal's away record in 2010-11 was statistically good, respondents point to some spectacular contradictory performances such as at Newcastle, Stoke, Bolton and Leyton Orient. As several respondents point out, the expressions 'mental strength' and 'great team spirit', so often used, simply did not apply.

They fought like lions in the first 20 minutes against Manchester United and then didn't bother against Villa. We want desire and passion at every match

It worries me that the players do not seem to have the pride and grit that previous Arsenal teams have shown – 'team spirit' perhaps?

Wenger's insistence that the team has mental strength patronises and insults the intelligence as we have seen the previous squads he has assembled



Of the 24 percent who were satisfied or highly satisfied with the football performance most say that Arsenal continue to play beautiful football and that the young team will deliver in time. Others say that Arsenal's continued presence in the top 4 is an achievement, especially considering the number of clubs (some of which have far larger funds for player investment at their disposal) now competing for a place at the top.

Trophies are not the only important thing and a Champions League place every year is an achievement

The way we dropped off in the last few weeks of the season was unacceptable but I still believe in the team, the majority of players and the manager

Wenger's football philosophy

As in 2010, the survey asked respondents if they think that Arsène Wenger's football philosophy takes too much precedence over the objective of winning trophies.

2010	Yes:	53%	No:	43%	Don't know:	4%
2011	Yes:	69%	No:	24%	Don't know:	7%

The views of the 69 percent who consider that Wenger's philosophy takes too much precedence over winning trophies vary. But the overall consensus is that it is time for both Wenger and the Board to concede that the current approach has either failed or has significant flaws and to take immediate action to strengthen both the squad and the football coaching staff.

Others say that the defects in the philosophy need to be addressed, but that with the addition of a few experienced players, the team could compete and win. Others say that the philosophy has gone wrong because Wenger has too much responsibility and too little help from either the Board or the football staff.

It is an absolute priority to strengthen the squad with players who are proud to wear the cannon. Without strength in key areas we are unlikely to win trophies in the next few years

There has been a massive dereliction of duty by the Board. Gazidis needs to force change and hire a strong assistant manager

Wenger needs to accept that he has taken on too much. Be brave and accept that help is needed



Thirty-four percent of all respondents who commented call for a new senior coach and/or the appointment of a senior defensive coach. Some consider that former Arsenal players should be brought back to fulfil this role. The defensive aspect of the philosophy is deemed to have the greatest flaws and be in need of the most attention.

There are fundamental flaws in the coaching of these players and even if we make three, four or five signings this summer, without an astute tactician/coach we will still fail

Largely, I agree with Wenger's football philosophy but I would like to see a good defensive coach brought in. It is evident from Barcelona's football that 'possession, passing teams' can beat more physical sides but we need our players to be more confident

I would like to see players such as Henry, Vieira, Adams and Keown involved behind the scenes – they could add some steel and gravitas to this developing team

For several years the extreme necessity to add more defensive muscle has been evident and the principal reason for lack of silverware and the end of season malaise. It is astonishing that this has not been addressed and, if it continues, will see us drop out of the top 4

A few respondents go further and say that as the current approach has failed, the club should hire a new manager and retain Wenger as director of football. Others think that a succession plan should now be put in place.

He is a great manager and I would be happy to see him finish his contract in another capacity; we should not lose him

It is time to identify a possible successor to Wenger. Remember even Herbert Chapman left a legacy of succession



Strategy

There is a strong perception among some respondents that the philosophy lacks the necessary strategies for competing with the different playing styles of opposition teams. Some comment that too many other teams know what tactics to use against Arsenal and that Arsenal are, too often, not able to adapt.

I think our attacking style has been rumbled by visiting teams and that we are too predictable. There seem to be no new ideas, tactics and approaches to cope with this

Unless we have a plan B our brand of football, that is good to watch, is not going to win us anything

It is not just about winning things but it is Arsenal's alarming ability to lose from a winning position that gives me major concerns – the naivety and defensive weakness must be addressed

I am not sure how well Wenger compares to other top managers in terms of team motivation, tactics, the transfer market and getting the best football staff around him

Player motivation, leadership and commitment

Many respondents commented on the apparent lack of player motivation, leadership on the pitch and the lack of passion for the club they play for. Many perceive these as key reasons for Arsenal's end of season capitulation.

I am not a 'silverware at all costs' supporter but I do want to see passion and commitment – nothing less than 100 percent is good enough for our shirt

I am mystified by the players' lack of motivation in the closing stages of the season when so much was within their grasp

The most significant missing ingredient is the lack of leadership on the pitch. It is essential that we acquire some players who really are 'mentally strong' and can keep battling when the going gets tough

It's not the philosophy that's wrong as much as the lack of ability to combine the philosophy with more steel and desire

This is not good enough – I don't expect to win everything but I do expect our team to fight for each other and the club – this is not happening



Of the 24 percent who think that the philosophy does not take too much precedence over winning trophies, around half consider that supporters should be 100 percent behind the manager. The others while broadly in support also acknowledge that the team needs strengthening, particularly defensively.

We all know Wenger has blind spots but I say supporters should be careful what they wish for

We must strive to retain the unique style and brand of football that Arsène has given us

We should not be swayed by media pressure into ousting the best manager this club has ever had. It's possible that he has had too much freedom and needs someone to encourage him to spend, but I can't buy into the theory that a top 4 finish is a failure

I love Wenger's football philosophy; it is truly magnificent and has given me great pleasure. My only criticism is that the team needs some experienced players, especially defensively

David Dein

In the 2010 survey, we asked if respondents thought the Board should appoint a senior director of football. In answer, 13% said yes, 50% said no, 33 % said it depends and 4% said they didn't know. Several respondents went on to comment that David Dein should be reinstated to perform this role.

This year we asked if respondents thought that as the club is now under new ownership, former Board member David Dein should be invited to return in a football specific role to support Wenger in delivering his football objectives:

Yes: 69%

No: 17%

Don't Know: 12%

No Answer: 2%

The 69 percent who say that Dein should be invited to return put forward several different reasons. Some said that he and Wenger worked well together in the past and that Arsenal enjoyed great success at this time. Others attribute the successful players signed during this period to Dein's influence. The remainder of the 69 percent say that this role should be in place but that Dein may or may not be the right, or indeed the only, person to fulfil it.

I would like an explanation of the last 5-6 years of underperformance and whether there was money for big signings or not and how much the exit of Dein was a factor

It's difficult to criticise Wenger or his great record but he has not strengthened the team with key players. What is needed is the Board to include someone who understands football – someone like David Dein

Dein is a controversial figure who has got some things badly wrong in the past. But even if he isn't the right man for the job someone needs to do it. No manager can be bigger than the club itself



The 17 percent who think he should not be invited to return point to the circumstances of his departure and/or that this would be a retrograde step.

There hasn't been sufficient challenge to the manager from the Board since Dein left, but I do think his actions and tactics at the end of his time at Arsenal smacked of self-interest and there is no place for him on the Board or at the club

I do not think Dein has some magic touch – he served the club well in his time but things have moved on now and Gazidis seems to fulfil much of his former role with considerable expertise

The time will come soon when we must consider splitting the management role, possibly with a director of football and a coach. Ideally, the director would be Wenger but this will only work with his full commitment

Dein is history – it's time for Gazidis to step up

The Board's confidence in the manager

Respondents were asked if they thought that if Arsenal don't win a trophy next season (which would be the seventh successive year without one) that the Board should reconsider its confidence in Wenger:

Yes: 42% **No: 40%** **Don't know: 18%**

The fact that as many as 70 respondents, 18 percent, answered 'Don't know' indicates the difficulty that some had with this question. Many who think that the Board should reconsider its confidence and those who think it should not focus on the same issue: the urgent need for squad investment. The difference is whether this is attributed to Wenger's decisions or to insufficient funds being made available to him.

An excellent manager who has provided fans with the most attractive football, but the lack of solidity in defence is plain for all to see and simply must be addressed

I am cognisant of the financial constraints the manager has been under but it is time to replace some of the 'dead wood' players with players of quality, experience and dedication – they don't have to cost £20 million each

I am still not convinced that there is sufficient money for Wenger to spend as in the past he has spent big money, so why wouldn't he now? However, if there is and he's not spending in the ill-founded belief that some of the players are up to it, he's gone mad!



Several other views were put forward as reasons why the Board should reconsider. Some say the manager's confidence in the team is mistaken – there is a strong perception that some players have not developed sufficiently well to justify a first team place. Others say that Wenger's immense reputation as an innovative and distinguished manager is being eroded.

Wenger is one of the best managers in football and his dedication to Arsenal is 100 percent. Sadly, this is not matched nor appreciated by the players. So his long-term vision has become pointless

There needs to be an acceptance of the failings in the team and that the players aren't as good as he thinks they are

If/when we do part company, it needs to be handled with a huge dose of graceful respect – his achievements should not be undermined by his end

It's time to admit that the philosophy has failed and resign. He is in danger of eating away at his legacy

Wenger is a hero to Arsenal fans but he seems to have lost his way. The club is so much bigger than one person and our history is becoming increasingly marginalised. In the early days of Wenger we had a competitive side because of a mix of experience, talent and pride. We have lost experience and pride

It's sad that Wenger has spent four to five years building a side who have won nothing. Now he has to ship out half the team and start again. One more chance I'd say and this is such a shame considering how much he has done for Arsenal

Of the 40 percent who think the Board should not take this decision next year, many consider that he has done well to consistently achieve a top 4 finish especially taking into account the limited budget.

Almost as many others say this decision would depend on what changes had been initiated but may not have come to fruition by that time. Others point out that there are only a limited number of trophies available and that they would prefer to watch Arsenal's style of football even if it doesn't produce trophies.

To deliver top 4 finishes every year is an outstanding achievement

Depends on how next season goes and what signings are made this summer. I am concerned that we will not finish in the top 4 without a change of playing staff

Cannot judge this until the end of next season – if the current weaknesses are addressed then a Champions League place should keep Wenger at Arsenal



There are only four trophies available with and we have no God-given right to any of them

When you consider the financial restrictions, Wenger's performance has been first class and anyway who could replace him?

Winning isn't imperative – I just want to be entertained and I have been since 1996

We would all like to win trophies year after year, but if that means watching Mourinho/Graham type teams or buying expensive players and placing debt on the club then I would prefer to watch good football and stay nearly men

The club, the Board and the manager are trying to build something and if they are allowed to finish, Arsenal will be a force for many years to come

Some others comment that it is not that Arsenal needs a new manager but that the manager needs to change his approach. Others point out that he just needs to be challenged.

Arsène Wenger revolutionised Arsenal and English football. He has now lost his edge and seems unable to reinvent himself – change, Arsène, or be changed

There just needs to be someone to challenge the manager – to complement him, not compliment him



For the 2011-12 season Arsenal took a decision to raise ticket prices by 6.5 percent. This included 2.5 percent in additional VAT. The club has pointed out that this is the first increase since the stadium move five years ago. The survey asked respondents a number of questions on the increase. First, if they agreed with it:

Yes: 14%

No: 78%

Don't know: 8%

It is no surprise that this increase, in the current economic climate, was received with great concern and anger among supporters generally. The main focus of discontent is that Arsenal ticket prices are already the highest in England, if not in Europe or the world. Many feel strongly that if supporters are to pay the highest prices they deserve to be watching the best football team.

As fans are asked to pay ever-more ridiculous prices so expectations increase. If we pay more than any other fans we naturally demand to have the best team in the country

Price increases should be linked to football performance with targets achieved

Considering the scale of players' wages, and the high cost of attending matches, the football performance is unacceptable

To have the most expensive tickets, while the club reportedly is in a healthy financial state, is a betrayal of the supporters

Others say that the increase is not reasonable considering the lack of player expenditure over the previous season. Some say that the money from the rise in ticket prices should not be used to increase player wages, which should be met by more lucrative commercial deals.

The increase has not been matched (so far) in player expenditure and supporters are not seeing value for money

A price rise would be slightly more acceptable if the money was not used to subsidise the wages of a set of already grossly overpaid and unmotivated players

If the club wants to charge us the highest prices in the Premier League then it should make us the biggest and most recognisable club. The world's best players should aspire to playing for us. Build the brand through commercial deals

Arsenal is too dependent on match day income. Commercial activities should produce a bigger share. £985 for the cheapest season ticket is a joke especially compared to Manchester United



Arsenal must consider options, other than to hammer the fans, to raise revenue – a pre-season tour is a good start

There have been a number of appointments to the staff by the chief executive yet so little progress on the commercial front

I resent the club raising funds by increasing ticket prices rather than through commercial deals, but I will still go

Apart from the naming rights and shirt sponsorship, too little is raised from additional commercial activities

Of the 14 percent who do agree with the ticket price increase, most say that it is reasonable as it is the first increase since the stadium move or that it is necessary for all businesses to keep up with costs.

No sustainable business can continually keep its prices at the same level. So some increase is inevitable particularly with the VAT increase

We don't store our financial problems for the future but act responsibly and with dignity. We should be wary of losing that and be proud of the way we do things

I accept that many find it difficult to manage but this is not a charitable exercise and income has to cover costs



Pricing supporters out

The survey then asked if respondents agreed with a statement made by Ivan Gazidis that the cost of attending live football is in danger of pricing supporters out and that the club should make affordability a key priority of its ticketing review:

Yes: 96% No: 2% Don't know: 2%

Comments included how difficult it is becoming for local residents, families, students and pensioners to attend matches. Some say that Arsenal is rapidly turning into a corporate and middle-class only football club. Some say that the ticket cost together with travel make attending Arsenal an expensive day out. A few asked the question that if this is Gazidis' view, why had he not had more influence over the decision to implement the increase?

There should be some cheaper tickets available for local residents for every game

My fear is that the club is in danger of pricing out those that have historically been the backbone of Arsenal's real support

How will the next generation of local and working class children be able to contribute to Arsenal if they are priced out?

My grandson is a Junior Gunner but cannot get tickets. He has a season ticket for Reading FC – £99. The next generation is being lost to Arsenal

It is such a shame that the real supporter is being priced out and the corporates are taking over

Why didn't Ivan Gazidis get his way then? He must have been a key player in the hike

The survey asked if they considered the ticket prices that Arsenal charges provide good value for money:

Very good value: 3% Good value: 47% Not good value: 50%

Precisely half say ticket prices are not good value and half say they are either very good or good value. The 3 percent who say that tickets are very good value refer to the high standard of football and the excellence of the stadium and its facilities. Of those who say they are good value many also refer to the enjoyable football and the benefits of the stadium. Others say the ticket prices are good value in relation to other forms of entertainment but not in football terms. Others that it is good value in the Family Enclosure, where concessionary tickets are available, but that concessions should be available to season ticket holders throughout the stadium.



Many respondents point out that there seem to be several average players on exceptionally high wages and that this should have been addressed before asking supporters for more funding.

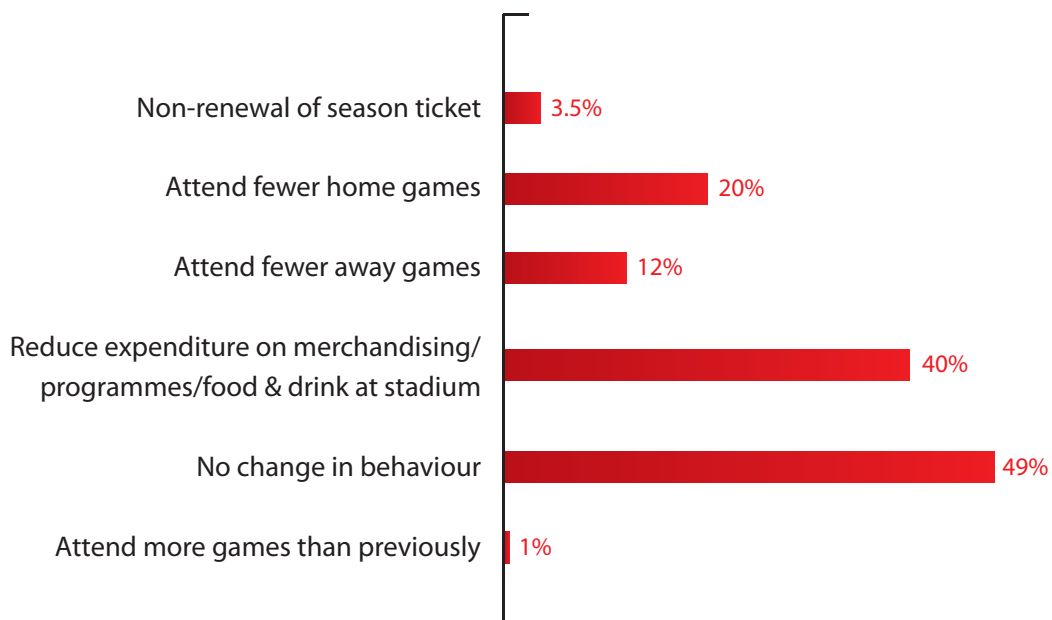
Arsenal is the only ground in the country where I cannot get a concession discount for a senior citizen

There should be concessions throughout the stadium so families can sit together

How can the club justify the increase in light of some of the improved long-term contracts handed out to players who have won nothing?

It appears that the high ticket prices are caused by the wages increase. Rather than indulge the already well-remunerated players, all clubs should be taking steps to lower wages

Respondents were asked how they envisaged the increase in ticket prices would affect their behaviour at Arsenal next season. They were given a number of options and asked to tick all that apply.





Some of the 49 percent who answered that the increase will result in no change of behaviour say this is because giving up going to Arsenal is not an option they are prepared to consider. Some point out that the club has a cynical attitude to fans as they know that once a season ticket is given up it is extremely difficult to buy one again at a later date (the club has made season ticket holders aware that there is a long waiting list for season tickets). Some of these said they could not reduce expenditure as they were not in the habit of spending inside the stadium as nothing on sale is of particularly good value.

No change as unfortunately football is an addiction – not something you can say no too

We moan about ticket price increases, then renew. The club knows this

I will still be there but will the corporates turn up to see us battling for fifth or sixth place? I doubt it

Apart from the options given, many AST members who are season ticket holders say that, to reduce expenditure, they will either sell more matches than previously through Ticket Exchange or sell their ticket to a friend for more matches. Some also pointed out that many season tickets are currently shared with someone on the waiting list. Several respondents commented that Ticket Exchange should be available to Family Enclosure members.

I wanted to loan out my season ticket for next season but couldn't find a taker so I will sell more games on ticket exchange

Like many friends, the rise in ticket prices together with the economic situation has led me to share my ticket. I guess that many football fans have been priced out of attending for at least ten years



The stadium

Many respondents commented on various aspects of the stadium and some put forward suggestions. Some say the advertising display around the pitch should not operate during play as it distracts. Several call for the re-introduction of a standing room area that would allow for cheaper tickets. Others say that the away fans should be seated in the upper tier leaving the lower tier for Red and Silver members and local residents, going on to point out that this could greatly enhance the atmosphere in the stadium.

The attendance announcement continues to be a source of irritation. Some ask that as the attendance number is demonstrably inaccurate, why figures for both seats sold and attendance cannot be given. Others suggest that as the number of seats sold is known at the start of the match, the announcement should be made then, when it is still unclear how many seats will remain empty.

I've been to a number of away games – Barca, Newcastle – where away support is seated a long way from the pitch. Why then do Arsenal give away fans such good seats where they can celebrate with and create an atmosphere for their players?

For a club that claims to do things the right way why tell such an obvious lie about attendance at almost every home game? Regardless if this is the international norm, why not give two figures – actual attendance and tickets sold?

Announce attendance earlier and avoid the derision



Respondents were asked to reflect on their own relationship with Arsenal and reviewing recent years, if they now feel a stronger sense of belonging to the club:

Yes: 24% No: 51% No change: 25%

Greater sense of belonging

Of the 24 percent who answered yes, many went on to say that this was either as a result of joining Fanshare or through membership of the AST and other supporter organisations. A few say that the difference between the new and long-standing supporters provides a sense of having been part of a club for a long time.

Involvement with the AST and AISA gives me more of a sense of belonging

I like to think that I have a connection with Arsenal through my membership of the AST and also the Fanshare scheme which gives me a sense of belonging to our club

I have been involved with the Fans Forum for two seasons and the club is trying to reach out to the fan base and increase the global brand

I feel more part of a club but only because there's a separation between the new 'glory' fans and those like me

Less sense of belonging

Several different reasons were put forward by those who say they now feel less sense of belonging to a club than previously – most say that they feel that supporters' views and aspirations are not sufficiently taken into account. Others say that the club underestimates the importance of, and has little desire to retain, long-term supporters.

The club has started to take its supporters for granted and while I understand the need for prudent housekeeping it ought to be remembered that this is a football club and winning trophies must remain a focus. It's still my club and my team but I feel more distant now than at any time since I fell in love with them in 1971

The club has taken for granted our unquestioning support and there should now be a more honest and open communication from the Board and the manager. We pay far too much for this not to happen



Long-term supporters should not be dismissed just because they can be replaced. This will backfire as the less-established supporters will soon tire of the lack of success

I do wonder what sort of supporters Arsenal wants, presumably not loyal, long-term ones? Perhaps they'd prefer tourists who would spend more money in the shop

Many also express an awareness of the increased alienation between players and supporters. Others say that the Board displays a contemptuous attitude to supporters, some going on to cite the Chairman's recent comments. Some say that the stadium still lacks atmosphere and that the club is missing out on revenues by the lack of improvement to the pre-match atmosphere in and around the stadium.

The players have become so far removed from the fans. They seem to have no knowledge of Arsenal's history or understand the passion supporters feel for all aspects of the club

I will always love Arsenal – that will never change but I do believe that some of the players don't have the same ideals as the supporters

Players need to feel a stronger connection with supporters – we are the club, after all

I have a real sense that Arsenal supporters are increasingly distant from the club – the atmosphere is too corporate and supporters are seen as customers. The interaction between the stewards and supporters has gone. Peter Hill-Wood's attitude seems to convey the message that fans are an irritation. I am left feeling at best patronised and at worst insulted

I feel a much weaker sense of belonging as there is so little connection with players, and the Board treats us with contempt. On the commercial side it is better but only as they want our cash

I remain Arsenal through and through but the club's relationship with its supporters is at its lowest ebb since George Graham's last season

I would like more supporter access to the reserve team so that a rapport can develop between players and fans. Why are they cocooned behind closed doors at the training ground?

There is no atmosphere before matches as there is no incentive to arrive early and this must impact on revenues from inside the stadium



Is the Board in touch?

Respondents were then asked if they thought the Arsenal Board and its senior executives are in touch with Arsenal fans and have a good understanding of their hopes and concerns for the future of the club

Yes, in touch: 8% **Slightly in touch, but need to improve: 57%** **No, not in touch: 35%**

Most of the 59 percent of respondents who considered the Board to be slightly in touch focussed on the need for the Board to improve its understanding of fans' hopes and concerns for the future of the club.

I have no doubt they are in touch – they would need to be both blind and deaf not to be. The question is, are they inclined to do anything about it? It feels like they are not

The ticket price increase at a time of great austerity shows the club is out of touch with reality. Reducing the squad by just one of its average players would have had the same effect

The Board should pay more attention to supporters' views and concerns. If this were to happen together with some changes of policy on football then there is every reason to believe that Arsenal can compete at the top for years to come

Future hopes

As in the 2010 survey, respondents were asked to look at Arsenal's ownership structure, its 'self-sustaining' business model, its football management and squad strength, and comparing these to other Premier League clubs, how optimistic they were about Arsenal's prospects during the next five years.

2010

Extremely optimistic: 26% **Optimistic: 49%** **Unsure: 15%** **Somewhat pessimistic: 9%** **Pessimistic: 1%**

2011

Extremely optimistic: 8% **Optimistic: 35%** **Unsure: 26%** **Somewhat pessimistic: 20%** **Pessimistic: 11%**

Optimistic and extremely optimistic

The 8 percent who are extremely optimistic comment positively on Arsenal's current ability to compete. Some are confident that the new ownership structure will bring benefits to the club and could impact favourably on the football performance.



The club, the Board and the manager are trying to build something and if they are allowed to finish, Arsenal will be a force for many years to come

We should hold our nerve and steer the same course for a year or two under the new ownership. So encourage communication in a positive and friendly way – for now anyway!

Winning the Premier League next season should be our priority and let's do it with style and determination

Whether optimistic or pessimistic, an overwhelmingly majority of respondents commented on the vital importance of acquiring several experienced players during the summer and disposing of an equal number of the consistent under-performers. The optimists express confidence that this will happen.

The 2011-12 season will either justify Wenger's policy of spending little and sticking to home grown players or it will signal the end of his tenure. I have faith that he will learn from 2010-11, add experience and talent to the current squad and win some silverware. If it ends badly then I fear for the future and more barren years

My level of optimism depends on Wenger's willingness to address the obvious deficiencies in the squad rather than the club's model

Other reasons given to be optimistic are the implementation of UEFA's financial fair-play regulations that are perceived to benefit Arsenal's sustainability model. Although some also expressed scepticism, saying that the less financially stable clubs will find ways to evade the rules.

I am optimistic in view of the new financial fair-play rules

Arsenal is in the best position of any Premier League club when financial fair play comes into force

The sustainable model can only really work for Arsenal if other clubs adhere completely to the 'fair play' rules and I doubt that they will

I hope Platini's plans have some clout and give more weight to self-sustaining clubs but I expect the rules will be circumvented



Some express a more modest optimism for Arsenal's future, while others say optimism is ingrained in all football supporters.

My optimism is based on the expectation that Arsenal will be in the top half dozen English clubs and will possibly get to the later stages in various cups. However, if winning the Champions League or the Premier League is the objective than I would say I'm somewhat pessimistic

I'm a football supporter so by definition I am an optimist. Optimistic but apprehensive

Unsure, somewhat pessimistic and pessimistic

As was also an issue in the 2010 survey, a good number of respondents comment on Arsenal's lack of ability to compete with clubs that have more funds, and that several clubs are now in stronger positions than previously to compete for the places at the top of the Premier League.

I am concerned that several other teams are growing in stature and that next season will be an extreme test for us

Even those of us 'who have never worked half a day in football' can see that Spurs and Man City have improved and more can be expected from Liverpool next season so Arsenal is going to have work hard

It's going to be harder next year to maintain a top 4 place let alone win the league. The management and Board seem blind to this and mired in complacency

It is going to be challenging competing with clubs that have much more to spend, so we must be realistic and wait for the long-term gains

Generally, there is a strong perception that during this summer respondents want there to be a sea-change in the club's attitude to the transfer-market and player acquisitions and disposals. These decisions are seen to be crucial to Arsenal's future success.

This feels like a watershed summer. Wenger's philosophy has led to too many underperforming players in the team under the guise of continued development. This has distanced the team further from the fans than at any time I can remember. Yes, youth must be given a chance but they must be accountable for their performance



Last year, the decision to keep some of the players, and some of the purchases, defied belief. This coming season must be different

Last year I was extremely optimistic but this year with the failure on the pitch, followed by Board insensitivity towards supporters and the unknown entity controlling our club, I feel extremely unsure

I hope next season will be the turning point and Arsenal can start winning again but, before that can happen, things will have to change, starting with the players

Mary Maude Research
June 2011



Ownership

Red & White should increase its shareholding and actively encourage supporters to buy shares. Eventually supporters should represent a decent percentage of ownership

It's very important that shares are made available to Fanshare so as to continue some supporter ownership

I need some time to see what Kroenke does – I hate the fact that our beloved Club is now owned by one rich American –so I will be watching him and the Board to see what develops

I worry that Kroenke may turn out to be a wolf in sheep's clothing

Red & White might stand a better chance of being invited on to the Board if it were transparent about how it raised the finance to buy its shares

What the Board did was take the easy way out for themselves. It was a betrayal and I have become totally disillusioned with them. I will only sell my shares via AST to genuine supporters. Does AST have safeguards for onward shares? Thank you for your presence, expertise, professionalism, advice and help

The Board should act as trustees for the supporters and build up a long-term sustainable fan ownership structure

Football performance

Either this squad has let the manager down or he doesn't see their shortcomings. It was bad management to be in a position where it was necessary to bring back Lehmann

Tony Adams should come back as a defensive coach

I stood up at the AGM and said that without top class defenders we would win nothing. The manager replied that I was being pessimistic. Neither of the last year's defensive signings is good enough

*Wenger needs to think about the coaching set-up and who can have an immediate effect
A change in football support staff with new ideas would help*

I don't begrudge the lack of trophies but we must show commitment and hard work

I am concerned at the lack of motivation and sudden and dramatic loss of form



I worry that the manager has lost the dressing room and cannot motivate the players

We appear to have everything in place but lack any killer instinct

We're going backwards and the football is not even entertaining anymore

Many of the players lack 'steel' and 'character' and appear to have no idea what the club stands for

Compare the current squad with five seasons ago – flat, stale and in need of new energy

Wenger's future will surely depend on the number of players who want out. The current outlook with Gazidis and Wenger is bleak

I have supported the club through many and varying performances. Now it seems the whole club lacks passion and the retention of the chairman and the senior coach shows a lack of willingness to commit to the change in the environment the club now faces

I am uneasy about the foreign ownership and am, regretfully, close to ceasing my support as there is no Highbury heart anymore

Great philosophy and I wish that Arsenal could win everything, using youth and with our financially well-balanced model, but we haven't. Invest in the team, cut the fringe players who have been there for years but not made the grade and we'll be fine

In Fiszman and Dein we had two men who loved the club – now we have a lot of executives and a remote businessman owner. We need someone with contacts, who knows his way around the game and the transfer market. I fear when Wenger goes we will get a second-rate manager and slip even further down

Dein should be brought back – the early success enjoyed by Wenger was when they worked together

The manager's faith in the current crop of players has been abused by some of them

This current squad of players is simply not good enough. The manager needs to bring in quality, experienced players and lose the underperformers

Once we win that first trophy we will move forward but I am not sure how Wenger can achieve this. He doesn't seem to see what the fans and the pundits see

It used to be said that this crop of players will come good and be on top for years – just wait and see, but now that's gradually becoming – 'well, Cesc, Clichy and Nasri are all looking for the way out'. Where do we go from here?



We have a manager who has achieved great things but who has now lost his objectivity

I still support Wenger but he simply has to change

I feel we need a change in the manager not of the manager. There are too many 'yes'men and he needs to be challenged

If results aren't good enough, the manager should be judged like any other football manager, and 11 points from 11 games is definitely not good enough

We supporters should not be disloyal to the manager or unappreciative of his efforts

We must invest in some quality players and lose the average ones that sap the wage bill

Performances against 'lesser teams' – Leeds, Ipswich, Huddersfield and Leyton Orient demonstrate that the current squad is set for a mid-table position at best. 'Penny wise and pound foolish' comes to mind and the lack of investment will kill the club not save it

The team continues to lack the maturity and experience to achieve results. Some of the more average players seem to be overpaid

Ticketing

Concessions should apply to all season tickets not just those in the Family Enclosure

The ticket increase is a PR disaster. My token gesture will be stop buying programmes thus bringing to an end my collection of every home game programme since 1950

I have reached the limit of my budget for tickets and if there is a further hike than that will be the finish of my season ticket

The whole experience costs a lot – the travel, something to eat – it is most of £100 and everything in the stadium is too expensive

There should be a section of the stadium with discounted tickets to encourage the less well off and enhance the atmosphere

Our all-conquering Ladies' team does not receive the recognition it deserves. Why not show highlights on the screens?



I struggle to get a ticket on my Red membership and never get the big matches. When I do get to a game against a mid or lower-table team, we lose. Why should I pay more for such inconsistent performance? If I performed similarly, I'd be disciplined and if I did so on a regular basis, dismissed

*If I thought the increase would result in an improved squad and results then I may have been in favour
It's three years to the new commercial deal and there needs to be good football performance to ensure the sponsorship deals are renewed at the highest level*

The club needs to recognise that the greatest catalyst to increasing commercial revenues is an attractive playing style allied to winning trophies

It is striking how much cheaper tickets are for away matches

Sentiment and expectations

Since the move I feel no connection with the players. There are no player songs anymore as it is difficult to connect with foreign players who come for a year or two and then leave

Like most supporters, I am usually an optimist about Arsenal's future prospects but now I feel confused

The 2011-12 season is going to be the most important in recent years. We keep being told there is money available, so if the Board is lying, they should resign and if it's true and remains unspent then the manager should be dismissed with immediate effect

This year is make or break for Wenger and the team – success on the pitch has to be a priority

Wenger has done a great job keeping us in the Champions League but unless we build on this and strengthen it will all be for nothing

This summer represents an overdue opportunity – new ownership, transfers and intentions for the next five to ten years will be dictated by their decisions

The stadium move has not delivered on the promise we were given

I fear that the sustainability model will only work if UEFA's Fair Play rules are upheld. But I suspect that money will talk and unless an investment is made to pay off our debt, which should have been a condition of sale, we will find ourselves losing out to the richer clubs