

# United Voice 2021-2022 Full Report

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MUST  
March 2022

# Headlines

1

In the wake of the ESL debacle and inconsistency on the playing side, satisfaction with how the club is being run, and confidence in its strategy to return to the top declined significantly from an already low base. The Glazers and the new CEO need to deliver on their recent commitments this year to start to reverse these results

2

The majority of respondents have some understanding of the proposed new Fan Share Scheme, and over 80% are likely to invest personally if it is backed by MUST. The proceeds should be re-invested back into the club.

3

Supporters want to see a major redevelopment of Old Trafford with expanded capacity and much improved facilities. They need reassurance that this will now happen and be fully engaged in its design and delivery

4

Over 50% of supporters fear that a version of the failed European Super League could return, and over 80% would oppose any such move. Supporters are also overwhelmingly opposed to potential significant changes to UEFA competitions that might result in more matches, favoured qualification or a reduction in size of the Premier League

5

Fans believe MUST has had a positive impact on supporter issues, but it needs to communicate its successes better. Supporters want its focus this year to be on the fan share scheme, stadium development and holding the club to account

6

This year's survey represents the views of 20,000 match-going and non-match-going supporters . Much of the fieldwork was carried out in the Autumn and performance on the pitch has declined further since then.

# Who Responded

Match-going status	Total (%)
Season Ticket Holder	3,965 (20%)
Deferred Season Ticket Holder	497 (2%)
Official Member (attended matches)	2,288 (11%)
Official Member (not attended matches)	5,047 (25%)
Non-Member	8,656 (43%)
<b>Total:</b>	<b>19,956</b>

Gender	Total (%)
Male	18,466 (93%)
Female	1,237 (6%)
Other	60 (0%)
Prefer not to say	193 (1%)
<b>Total:</b>	<b>19,956</b>

Home location	Total (%)
UK	11,376 (57%)
Ireland	1,120 (6%)
Rest of Europe	2,288 (14%)
Rest of the World	5,047 (21%)
Prefer not to say	8,656 (2%)
<b>Total:</b>	<b>19,956</b>

Age	Total (%)
Under 21	768 (4%)
21 to 40	8,271 (41%)
41 to 54	5,240 (26%)
55 to 64	3,043(15%)
65+	2,414 (12%)
Prefer not to say	220 (1%)
<b>Total:</b>	<b>19,956</b>

MUST Membership	Total (%)
Full	2,972 (15%)
Match-going Member	205 (1%)
Lapsed or Cancelled	2,338 (12%)
Lite (free)	4,665 (23%)
Never	9,776 (49%)
<b>Total:</b>	<b>19,956</b>

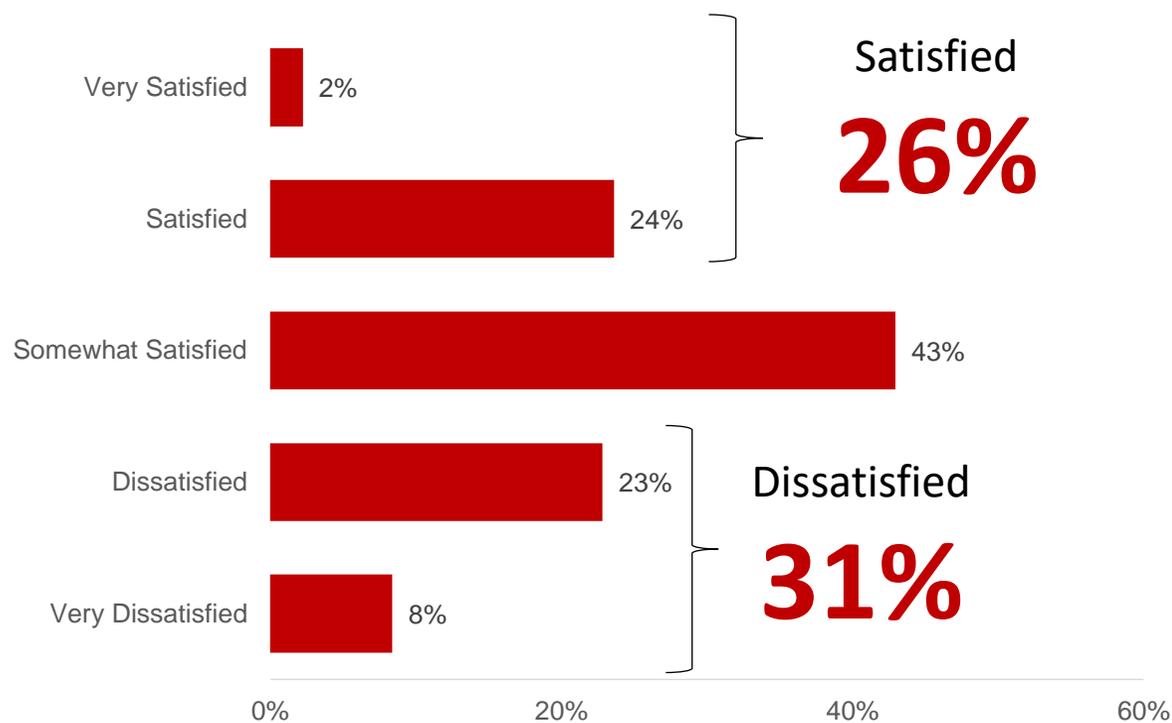
The survey was carried out between October & December 2021, with invitations issued in three main batches.

25,150 recipients started the survey of which 19,956 completed it in full. Only complete responses have been analysed.

# Perceptions of the club

# Perceptions of last season's performance are mixed with just a quarter of all supporters satisfied and around a third dissatisfied

Q1 - How satisfied or dissatisfied are you with the overall performance of the team last season?



Last season was not a disaster, reaching a cup final and finishing second, but nor could it at all be considered in any way successful.

Just a quarter of all supporters were satisfied and with two thirds at least somewhat satisfied with the progress made. This was a drop on last year when 35% were satisfied and a further 47% somewhat satisfied

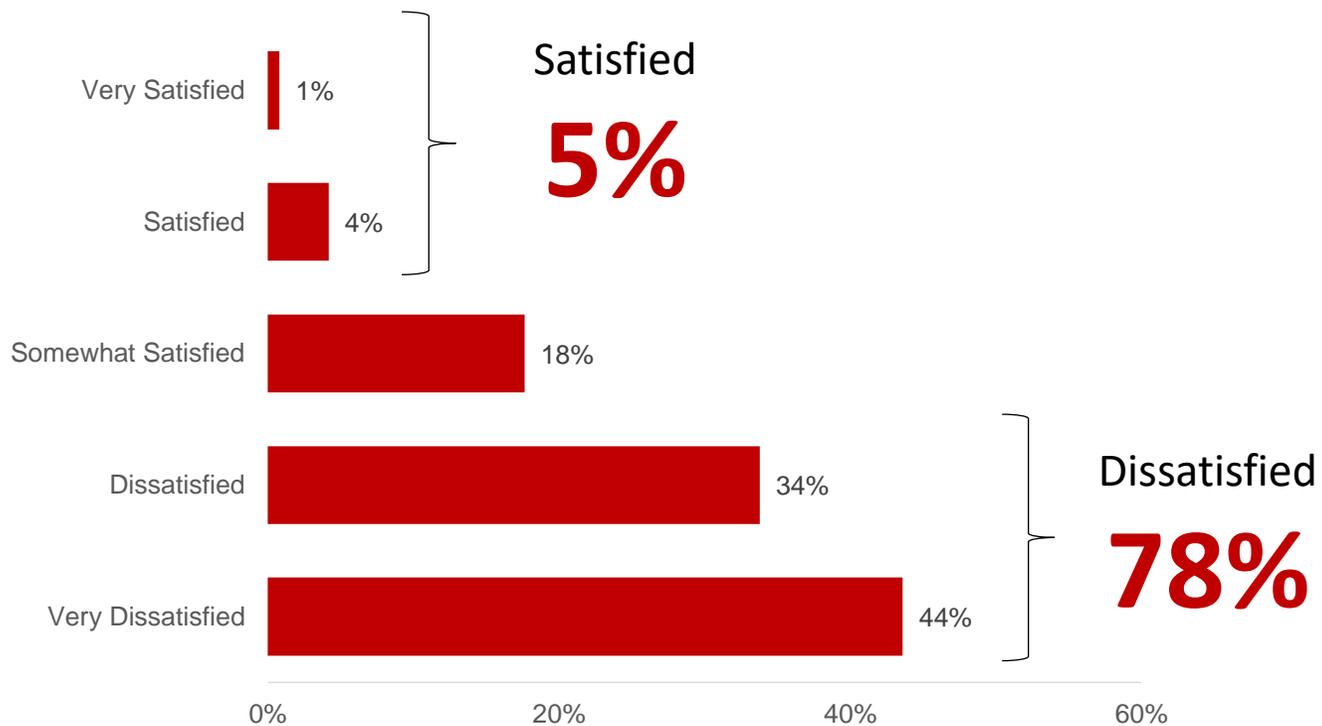
Given the lack of trophy success, it's understandable that a third (31%) of all supporters were dissatisfied

Dissatisfaction was highest for those who have never watched a match at Old Trafford (36%), those living outside of the UK or Europe (37%) and younger respondents (Age 21-40 34% & Under 21 41%)

Base: Survey Completes (n = 19956)

# Just 1 in 20 supporters are satisfied with the way the club has been managed in the last year by the owners and directors

Q5 - Overall, how satisfied or dissatisfied are you with the management of the club over the last year by the Owners and Directors?



When we first asked this question in 2019 (relating to how the club had been run since 2013) only 2% were satisfied and a further 7% were somewhat satisfied. In 2020 these improved to 10% satisfied and 22% somewhat satisfied.

That improvement has been reversed this year. This probably reflects the low of the ESL debacle and the continuing instability during the period of this survey. Supporters remain cautious about the delivery of post ESL commitments by the owners.

Supporters who don't attend games are more dissatisfied

- Season Ticket Holder 71% Official Member 76%
- Never been to Old Trafford 82%

Age also seems to be a factor:

- Over 65 65% 55-64 70% 41-54 75%
- 21-40 84% Under 21 93%

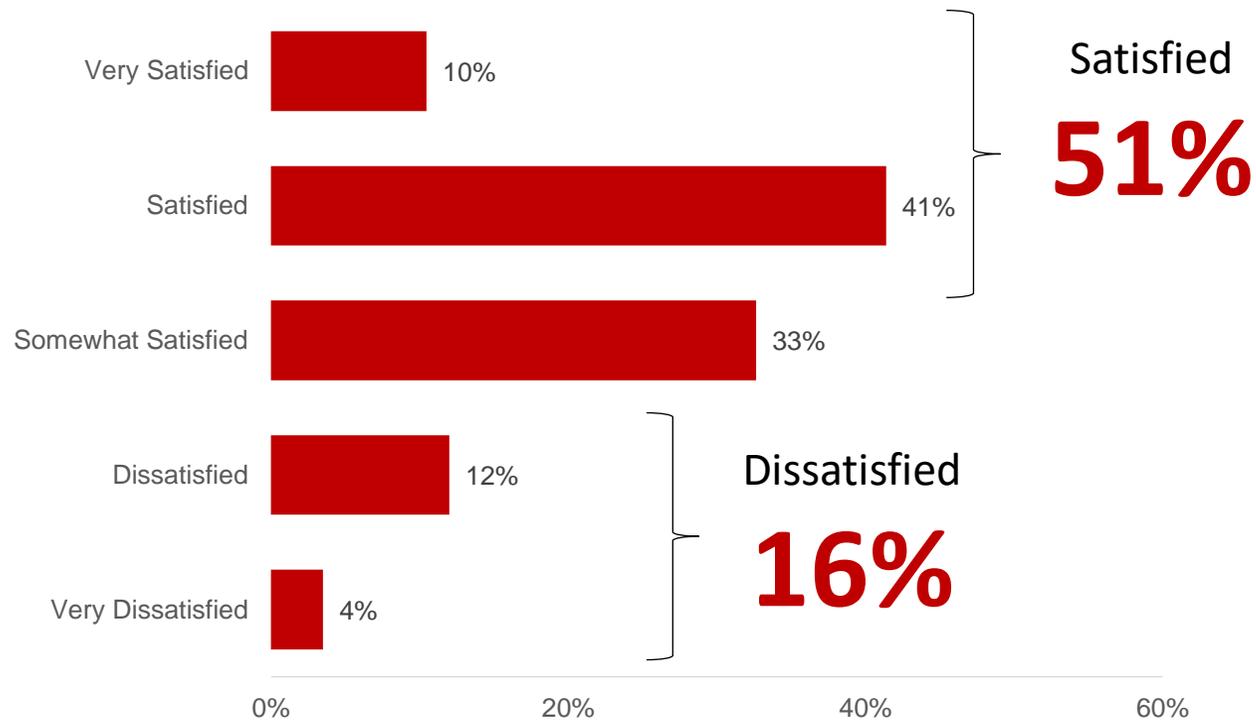
And MUST Members, who are arguably better informed on key supporter issues, are slightly less dissatisfied:

- Full Members 69% All MUST 74%

Base: Survey Completes (n = 19956)

# Generally, supporters are satisfied with the level of investment in the squad this season

Q2 - How satisfied or dissatisfied are you with the investment in the squad in comparison with our main rivals in England and Europe in the 2021 transfer windows?

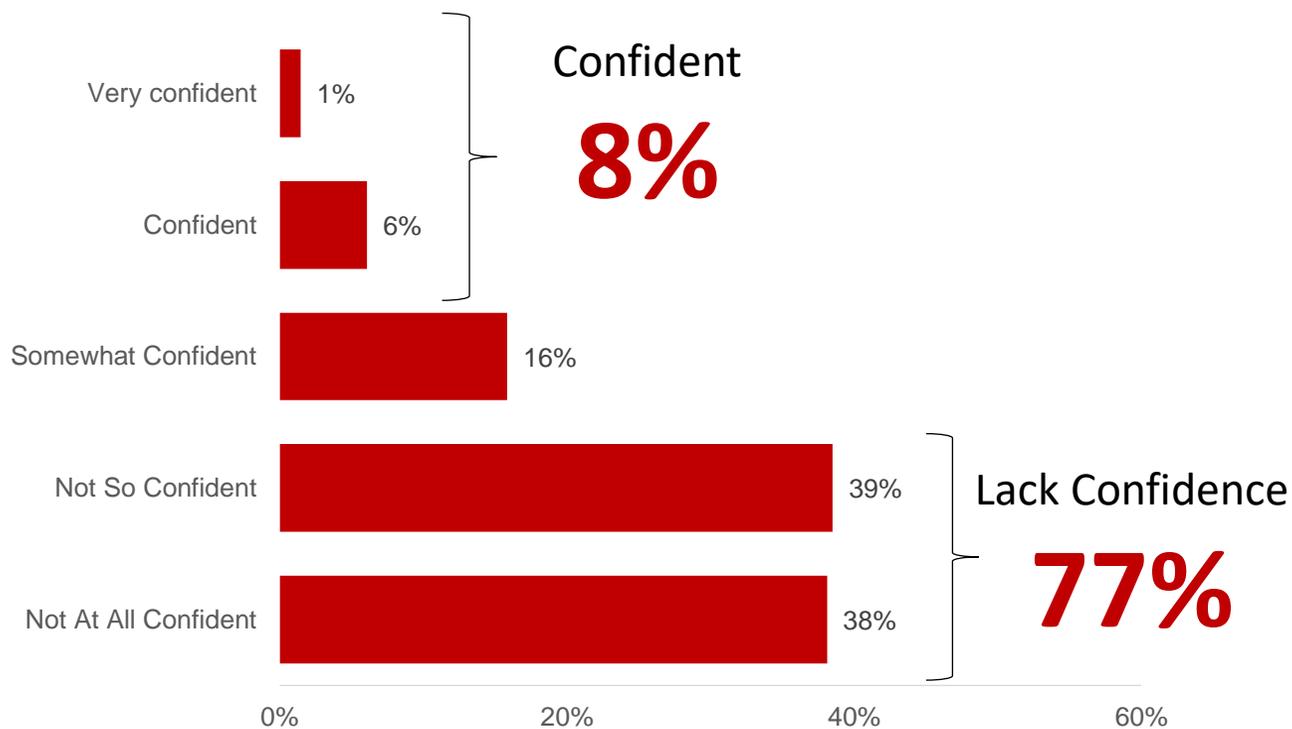


Satisfaction with the level of investment has improved significantly from previous seasons – in 2019 only 18% were satisfied and a further 40% Somewhat Satisfied. In 2020 34% were satisfied with the January transfer window (when Bruno was signed) but only 13% for the subsequent Summer window.

Base: Survey Completes (n = 19956)

# Despite the changes to the football side of the club and squad investment, supporters lack confidence that there is a clear strategy to return to the top

Q6a - Having a clear vision and strategy to return to the top



Supporters continue to lack confidence that there's a clear vision and strategy to return to the top with over three quarters of all supporters being not at all confident or not so confident.

Responses this year show a marked decline from our previous surveys in 2019 (28% confident and a further 32% somewhat confident) and in 2020 (32% confident and 31% somewhat confident).

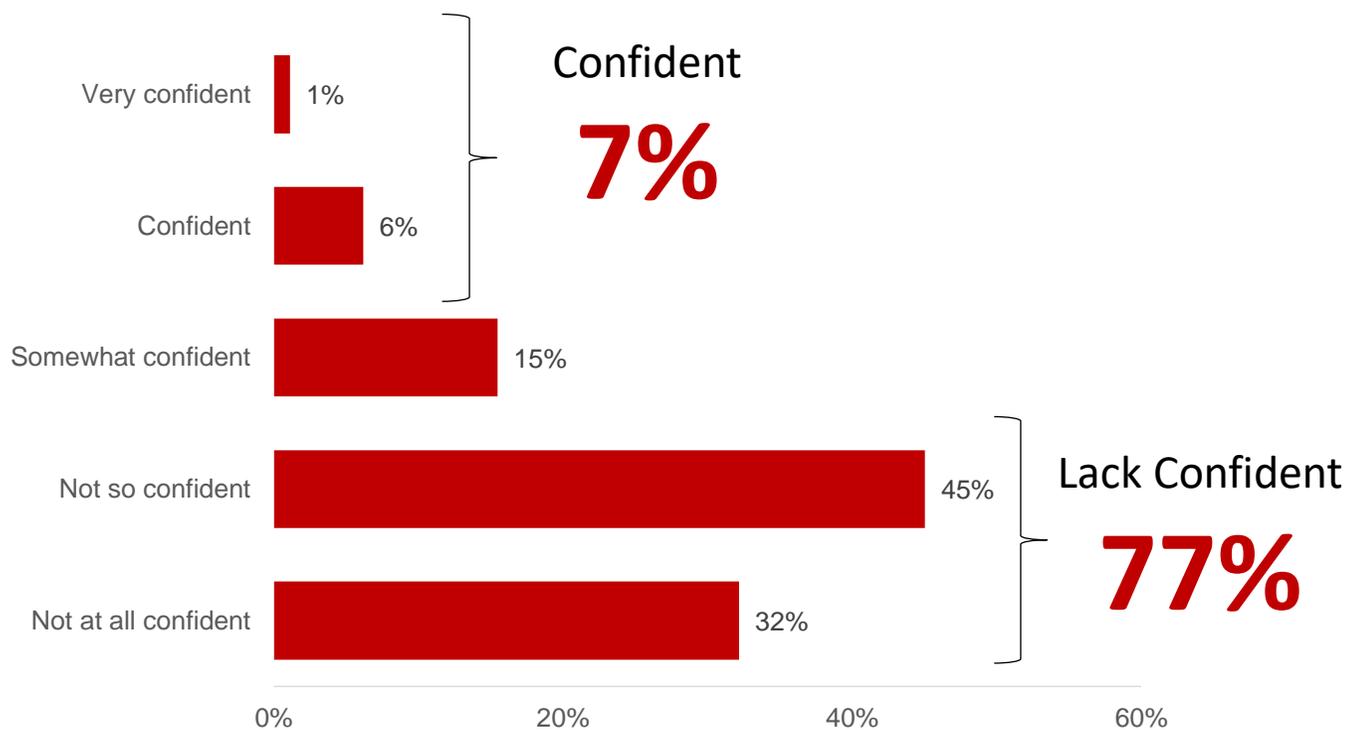
In part, this will be driven by the current state of flux but years of mis-management and decline on and off the field, while our rivals have overtaken us on all levels, have clearly taken their toll.

The lack of confidence is consistent across all respondent types with the Under 40 age group being least confident (80%)

Base: Survey Completes (n = 19956)

# Given the current turmoil at the club, it's unsurprising three quarters of all supporters lack confidence that the team are ready to challenge for trophies

Q3 - How confident are you that the team will be able to challenge for any trophies this season?



Despite what appeared to be a strong transfer window, from only a few games into the season, it was clear there were issues within the squad resulting in this very low confidence that was consistent across all respondent types.

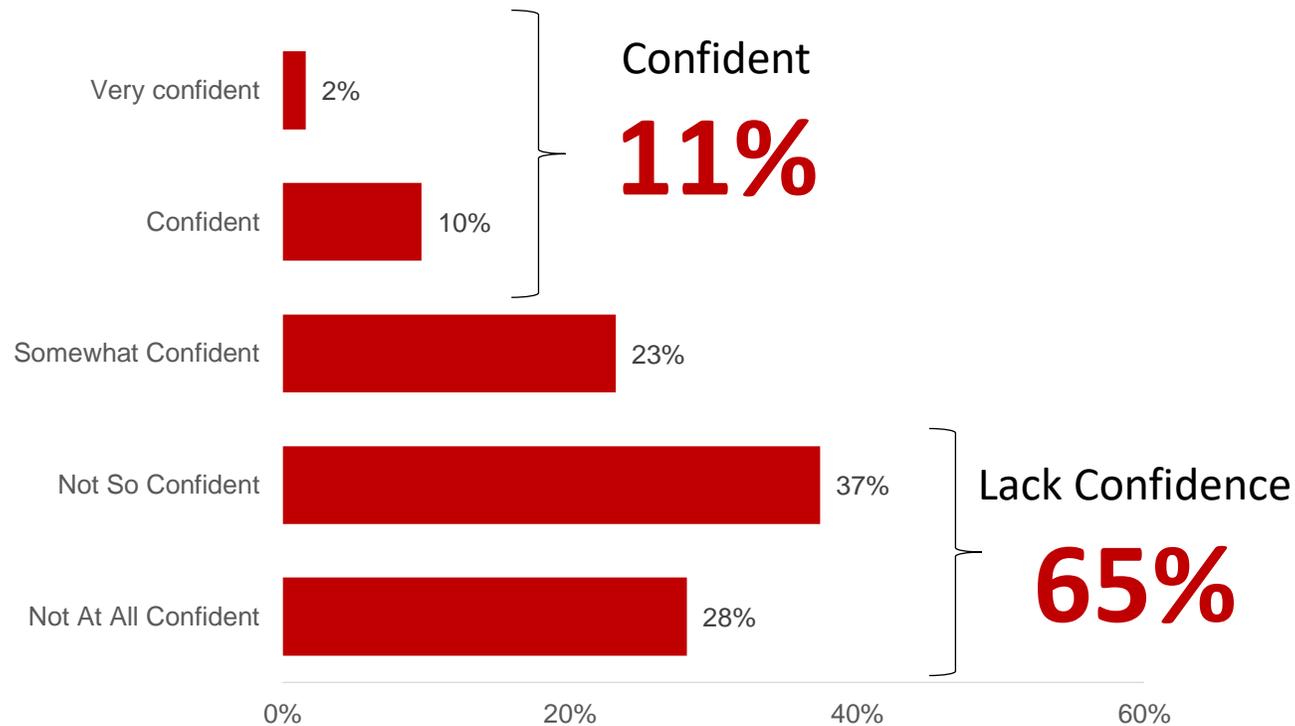
Responses dipped even further for responses received in November, before recovering for final returns that were received after the change of manager.

This is the lowest level of confidence in competing for trophies and a significant reduction on our 2020 survey when 25% were confident.

Base: Survey Completes (n = 19956)

# Supporters also lack confidence that the owners are looking to invest and maintain a title winning squad

Q6b -Commitment to create and maintain a title winning squad/team



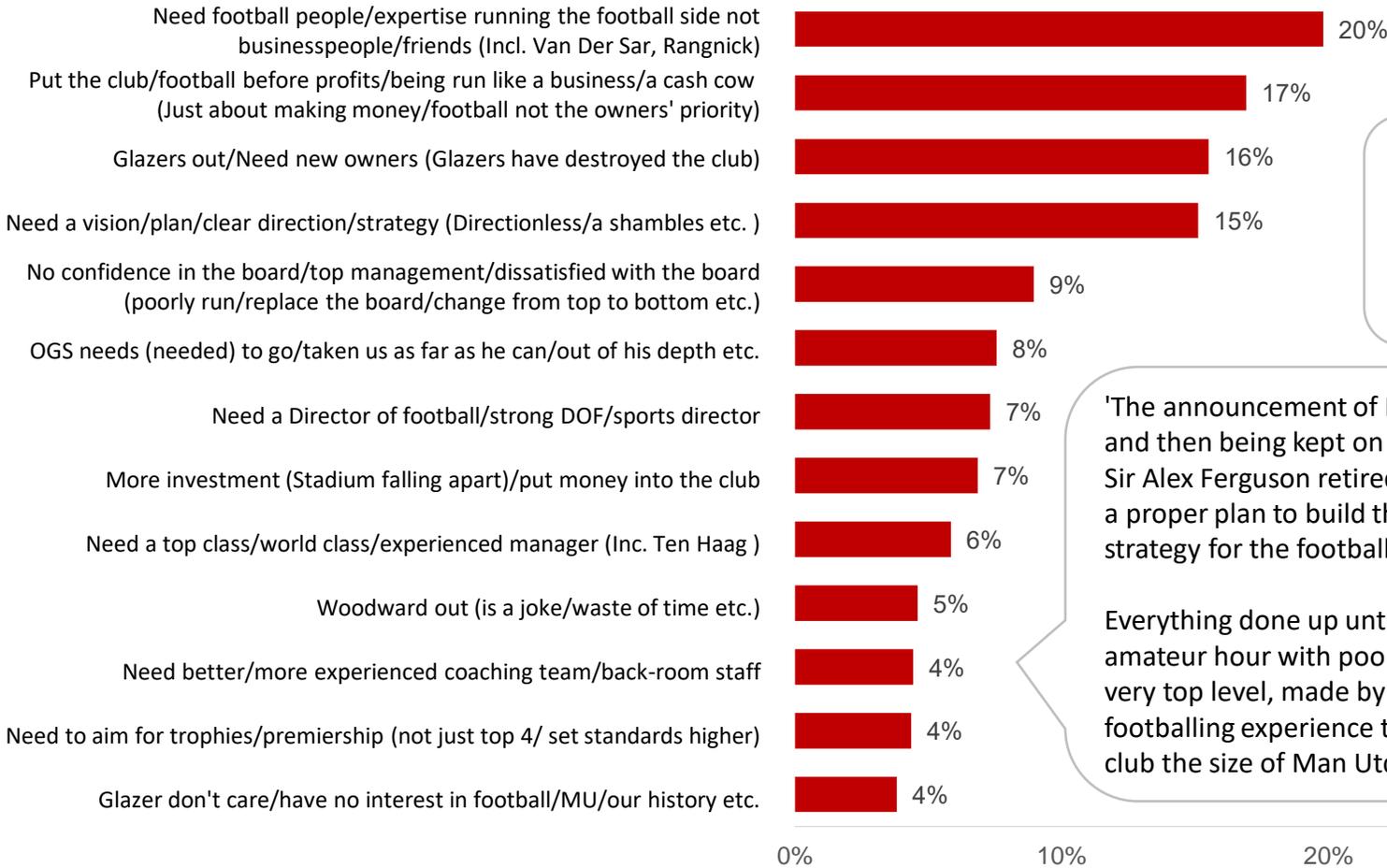
Despite United having the highest net transfer spend in the Premier league over the last 5 years, and their satisfaction with the level of transfer spend last season, two thirds (65%) of all supporters still lack confidence that the owners are looking to create and maintain a title winning squad in the long term

Past behaviour undoubtedly drives current perceptions. With many supporters perceiving the current owners only really invest if Champions League qualification is in doubt and that fourth is good enough as that helps maintain those crucial commercial deals

Base: Survey Completes (n = 19956)

# Additional comments made by supporters'

Q7 – Please add any further comments around the management of the club (Optional)?



'No clear vision. No sign that they want to improve the current position of the club'

After the super league debacle decision making seems to have improved'

'The stadium needs massive investment. We are one of the biggest clubs in the world'

'Excellent at commercial side of club and generating income but appear to lack football knowledge and the history and traditions of the club'

'The management team are more focused on shareholder return (I own shares) but are not investing the long-term viability of the end product from end to end. (Infrastructure, youth system and first team)

'The announcement of Ralf Rangnick as interim manager and then being kept on as a consultant is the first time since Sir Alex Ferguson retired that we seem to be putting in place a proper plan to build the short, medium and long-term strategy for the footballing side of the club.

Everything done up until then has seemed to be pure amateur hour with poor decision after poor decision at the very top level, made by people who don't have the footballing experience to know how to build the team at a club the size of Man Utd.

'No football knowledge. And only interested in using the club as a money cow'

MUST United Voice 2021; Base: Those responding n = 1282

# Perceptions of the Club

## What you said

Only **26% were satisfied** with the performance of team and only **7% confident** of winning any trophies this season, both significantly less than in 2020. And performance on the pitch has declined further since these responses were recorded.

Satisfaction with how the club is being run remains very low with **78% dissatisfied**. The ESL debacle has reversed the slow improvement (from a very low base) in 2019.

Correspondingly, confidence that the club has a clear strategy to return to the top has fallen significantly. **77% lack confidence** compared with **36%** last season

The increased and improved investment in the squad (**51%** satisfied) has been acknowledged, but this does not yet translate into confidence in continuing investment squad to compete at the highest level - **77% lack confidence**, compared with **36%** last season

Satisfaction and Confidence levels are slightly more positive/less negative among match-going fans, UK based fans and older fans (over 40's).

## Our Actions

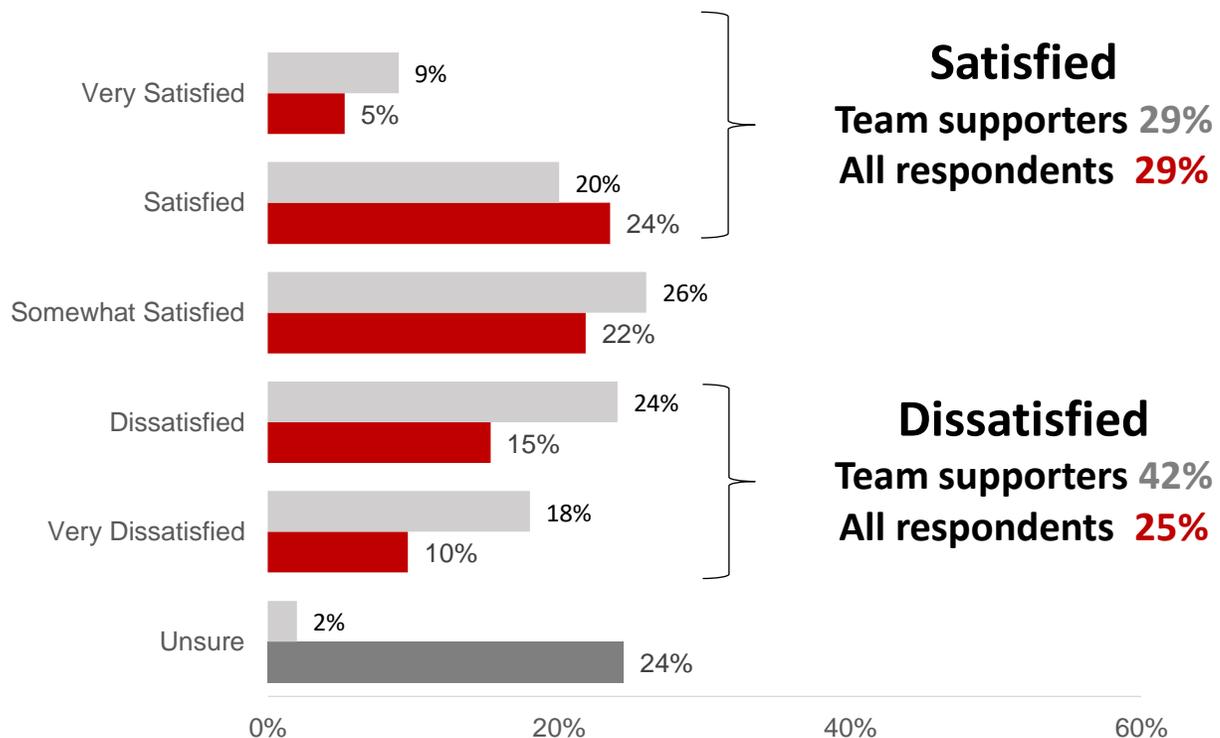
We are sharing these results and conclusions directly with the club.

Responses mainly pre-date the change of manager and the new CEO appointment. It remains to be seen what impact those changes will have but we will highlight the need for the new strategy and commitments to be shared fully with supporters.

# Women's Team

# Perceptions of how the club has developed and funded the women's team since it was formed are mixed

Q4a – How satisfied are you with how the club developed, funded and supported the MUFC Women's team since it was formed



This question was open to all respondents but clearly those who recorded that they were supporters of the Women's team will have an more informed view. That is reflected by their much lower Don't Know responses.

Satisfaction has reduced significantly since last year when 57% were satisfied. This may reflect concerns over the summer when the manager resigned, in part due to her concerns over lack of investment.

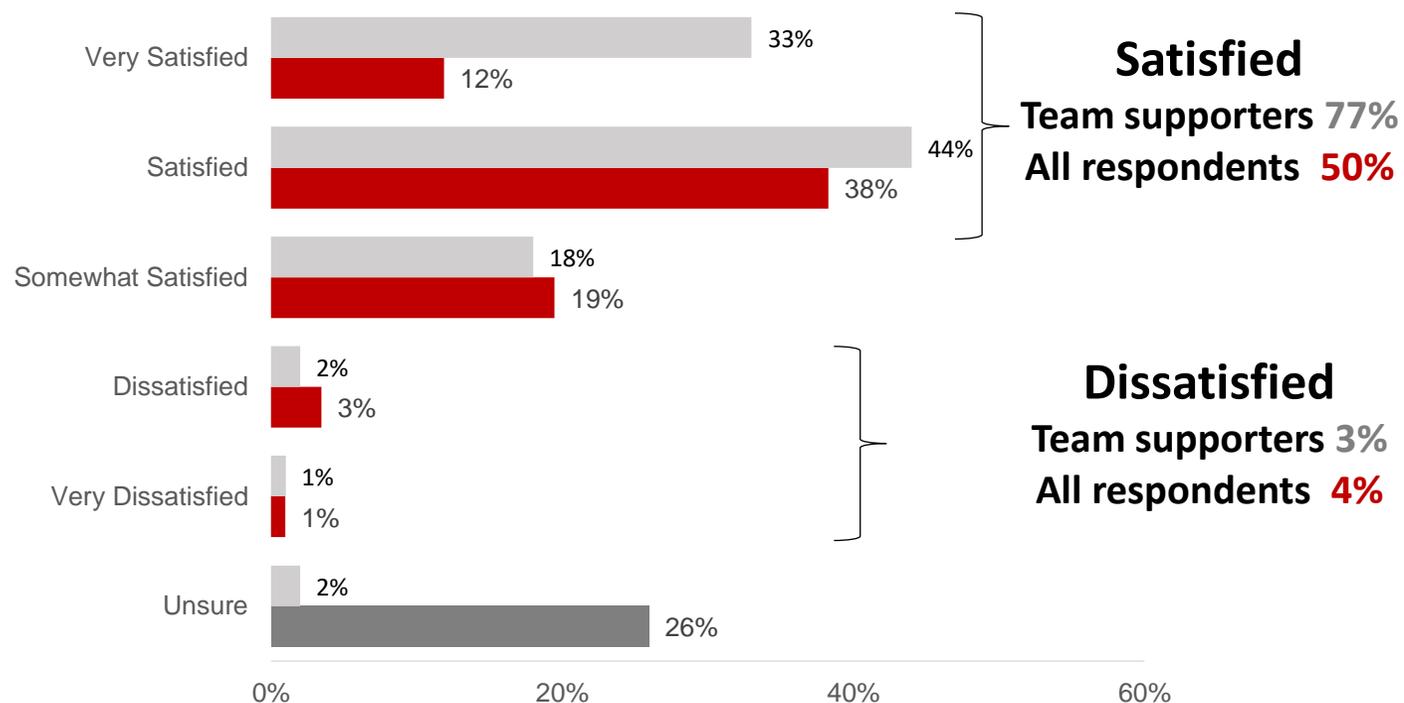
Members of the (MUWSC) Supporters Club, arguably representing the most committed supporters, record higher satisfaction at 35%

It's clear more work needs to be done not only to take the team to the next level but also with wider fan engagement and comms to grow the base

Base: Survey Completes (n = 19956). Declared supporters of Women's Team 474 of which 107 are also members of the Supporters Club

# Generally, those aware are satisfied with the performance of the women's team in its first few seasons

Q4b - With the performance of the MUFC Women's team in its first few seasons



Half of all supporters are satisfied with the performance of the women's team over the last two seasons and it is noticeable that active supporters are significantly more satisfied.

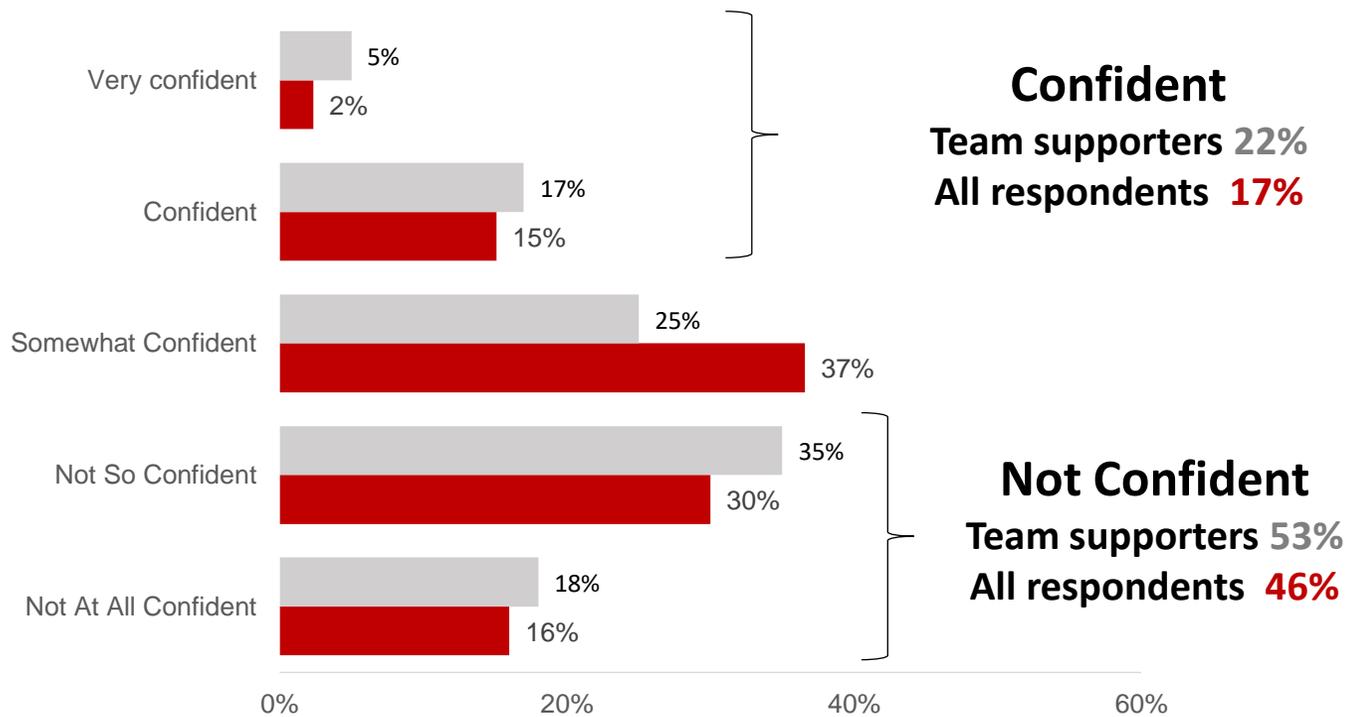
This is still a reduction from the 72% overall positive response that our 2020 survey recorded (we didn't separately identify active supporters). Again this may reflect the instability caused by the change of manager.

Winning the championship in the team's inaugural season then finishing fourth twice in the WPL can be deemed success. But now the team needs to kick on.

Base: Survey Completes (n = 19956). Declared supporters of Women's Team 474 of which 107 are also members of the Supporters Club

# Although more positive than for the men's team, supporters lack confidence that the owners will continue to invest what's required to get to the top

Q6d -Investing in the development of the women's team to create a title winning squad/team



We asked this question for the first time this year following the commitment made by Joel Glazer at the June Fans Forum:

*"... we're going to be committing the proper resources. We want to compete for trophies in any competition we're involved in, in the women's category, and we're going to make sure we do so."*

Responses show that the majority of supporters are still to be convinced. The June promises have yet to translate into evidence of the necessary level of investment and it's too early to say whether the managerial and structural changes are making a difference.

However it is notable that the level of confidence from respondents who are members of the Supporters Club (MUWSC), who have had more direct dialogue with the club, is significantly higher (33%).

Base: Survey Completes (n = 19956). Declared supporters of Women's Team 474 of which 107 are also members of the Supporters Club

# Women's Team

## What you told us

Satisfaction with how the club has developed and funded the team since its formation in 2018 has dropped from 57% in 2020 to 29%. This may reflect the events of last summer when the manager resigned amid concerns over insufficient investment in facilities and key players leaving.

Satisfaction with the performance of the team is higher at 50%, but this is a fall from 72% in 2020. However respondents who identified themselves as supporters of the women's team were significantly more satisfied (77%).

Only 17% are confident that the owners and the club will continue to invest what's needed to get to the top, although a further 37% are unsure (somewhat confident). Supporters of the Women's team are only slightly more confident (22%) but 53% are not confident.

It is notable that members of the Women's Team Supporters Club (MUWSC) who are more engaged and informed about the club's strategy plans are more satisfied with development & funding (35% vs 29%) and more confident of future investment ((33% vs 22%).

## Our Actions

We have shared the results with the MUWSC as well as the club.

The club has recently established deeper channels of engagement with MUWSC. We acknowledge the mutual benefits of that development.

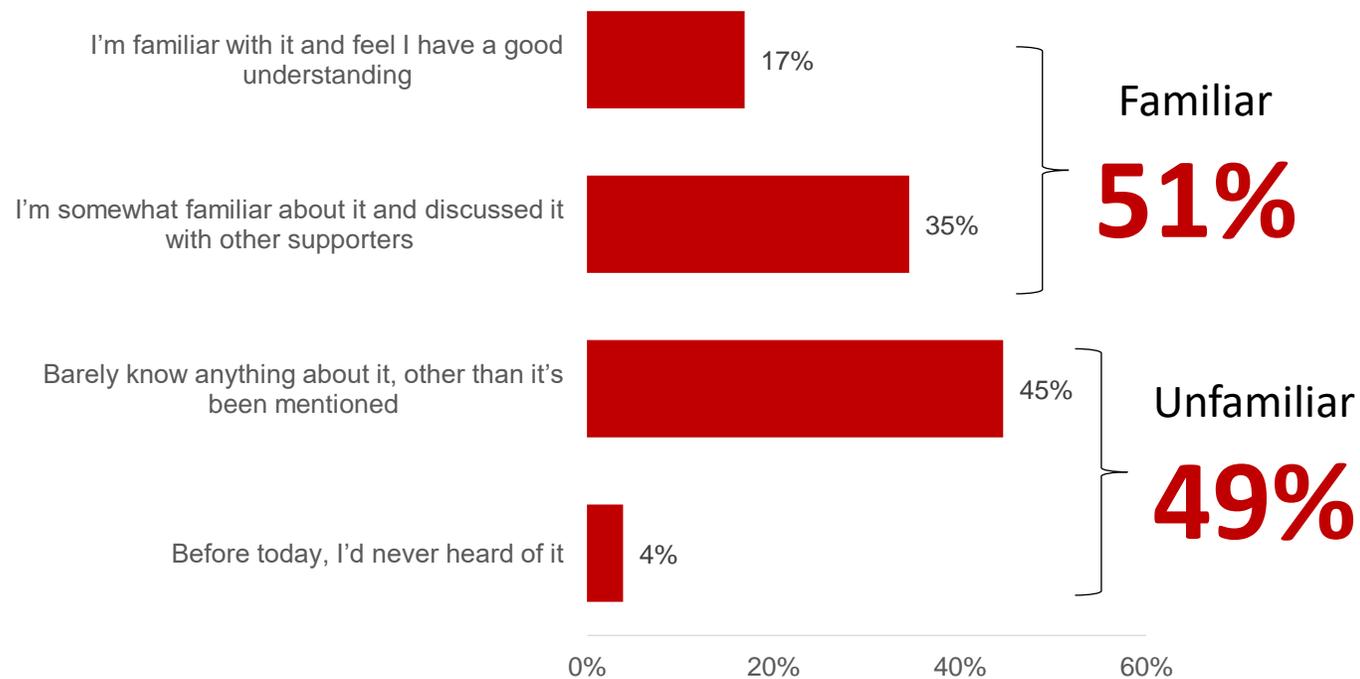
We want to see more communication between the club and supporters to explain and assure them about future plans and goals.

We also need club support for MUWSC and MUST to engage with women's team supporters to understand and respond to their views, needs and issues.

# Fan Share Ownership

# Around half of all supporters have some familiarity of the Fan Share Ownership Scheme

Q8 - Which of the following statements most closely resembles your knowledge / understanding of the club's commitment to create a fan share ownership scheme?



Following the commitment made by Joel Glazer after the ESL fallout, MUST has been negotiating with the club on the details of an acceptable scheme. Only the principles have been publicised and only on our MUST mailing lists, including our recently created Sign for United campaign have been briefed on progress.

So it's no surprise that those groups are more familiar with the proposed scheme, but even their knowledge is limited at this stage.

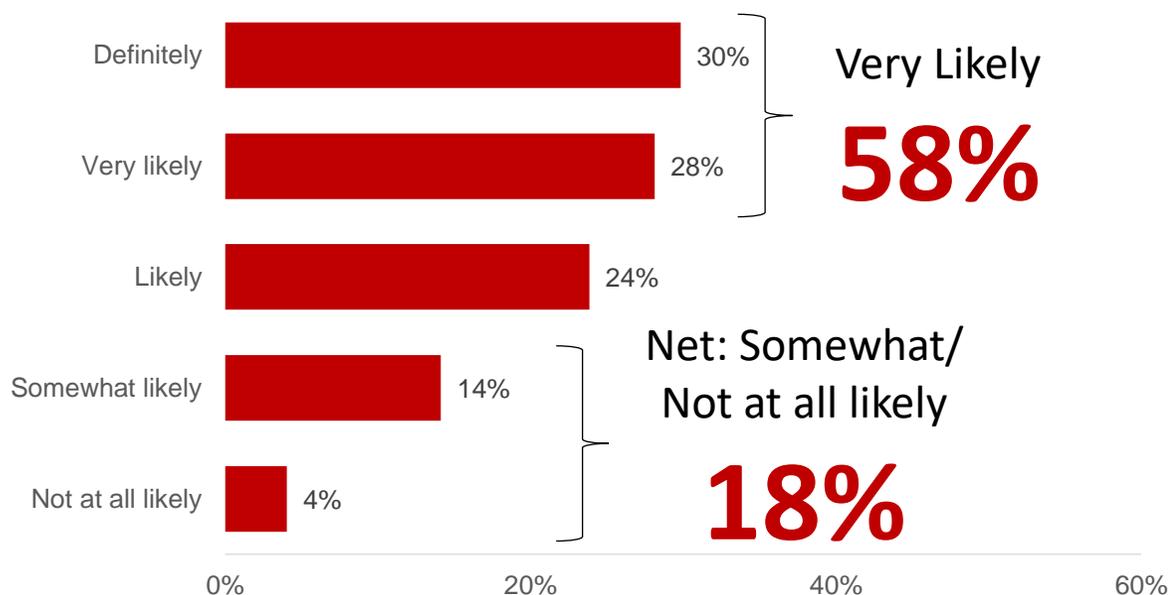
At least somewhat familiar (% Top 2 Box):

- MUDSA 64%
- MUST Full member 62%
- The Red Army 62%
- All MUST Members 57%
- Sign for United Member 56%
- Season Ticketholders 53%
- Don't attend matches 47%

Filter: All Supporters base (n = 19956); Full Member (2,972), MUDSA (172), All MUST Members (7,842), Away Loyalty Pot (181), Red Army (838), SFU Member (14,543), One Member (7,335), STH (3,468)

# With MUST endorsement, four fifths of all supporters are likely to participate in a fan share scheme with well over half 'Very Likely'

Q12 - If supported by MUST, how likely would you be to participate in a fan share ownership scheme?



Even with very little information in the public domain, a Fan Share Scheme has overwhelming support amongst our fan base, with four fifths claiming they are likely (83%) and 58% 'Very Likely' to participate.

Unsurprisingly those who are most familiar with the proposed scheme are more likely at this stage to want to invest

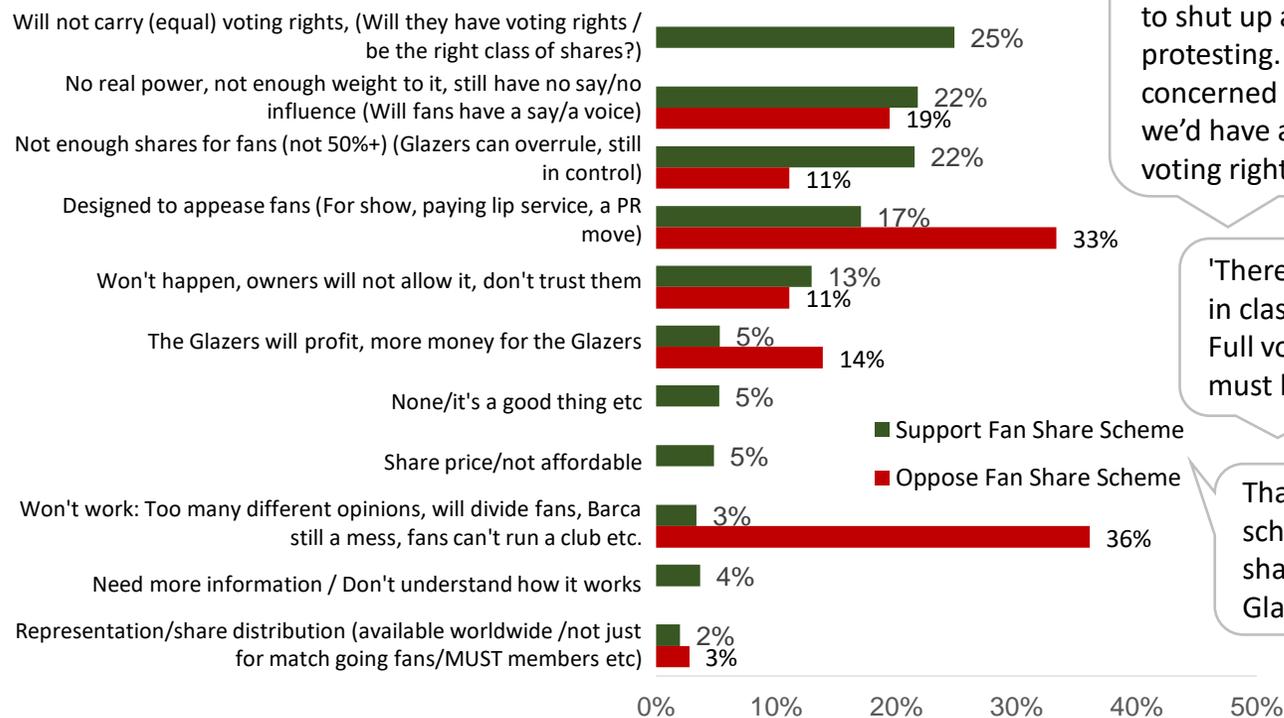
Groups 'Very Likely' to participate (% Top 2 Box):

- MUST Full member 77%
- MUDSA 72%
- All MUST Members 67%
- Away Loyalty Pot 66%
- The Red Army 64%
- One Member 63%
- SFU Member 62%
- STH 61%

Filter: All Supporters base (n = 19956); Full Member (2,972), MUDSA (172), All MUST Members (7,842), Away Loyalty Pot (181), Red Army (838), SFU Member (14,543), One Member (7,335), STH (3,468)

# Concerns focus upon the amount of influence supporters will have through the size of the fan share stake and equal voting rights

Q10: What would make a fan share ownership scheme something you would want to participate in [Optional]?



Q11: What concerns, if any, do you have about any future fan share ownership scheme [Optional]?

'That it's a ploy to get us to shut up and stop protesting. Also concerned about whether we'd have any meaningful voting rights.'

The Glazers will make sure that nobody except them will have any meaningful control

'Will not be a big enough part of the total shares to make a difference.'

'There must be parity in class of shares. Full voting rights must be offered.'

'My concern is that it's a token gesture to give fans hope when in reality it will have been worked to give the maximum amount of shares and can be offered but still be in control of everything.'

If we were given the chance to buy a meaningful amount of shares, with full voting rights.

That the shares offered under the fan share ownership scheme does not provide the same "rights" as the shares held by the club owners, thereby allowing the Glazers to override any fan votes

'Scheme needs to give fans a meaningful say and significant voting power, or there is no point.'

It would need to be on equal footing to the shares the glazers own and also not be capped. The fans should be able to buy as many shares as there is appetite for.

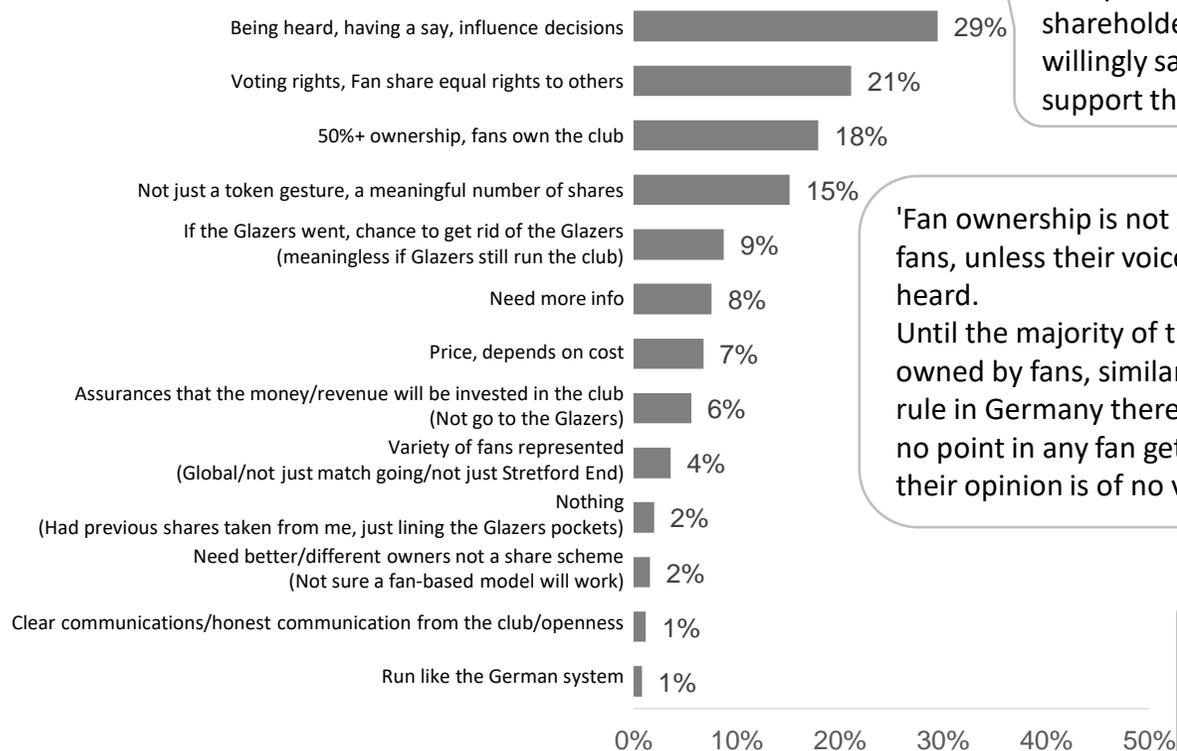
The percentage share appears to be very low at the moment and would need to increase significantly to have any major effect on running of the club.

Filter: Supporters who either support or oppose Fan Share Scheme Support (1,389), Oppose (36)

# Explaining how the scheme would work will help convince those who are yet to commit. The scheme needs be made available to the full fan base.

Q10: What would make a fan share ownership scheme something you would want to participate in [Optional]?

Q11: What concerns, if any, do you have about any future fan share ownership scheme [Optional]?



'A superb concept. Already a small shareholder in the club, and would willingly sacrifice these shares to support this initiative.'

'I would have to know a lot more about it before I would decide'

'It needs to be inclusive. Not just match-going fans because millions upon millions of people support this club but less than 80k can fit in the stadium. Everybody needs to be represented. Fairly.'

'Fan ownership is not of any value to fans, unless their voice can truly be heard. Until the majority of the club is owned by fans, similar to the 50+1 rule in Germany there is essentially no point in any fan getting involved as their opinion is of no value.'

'The cost for fans who genuinely want to get involved but can't even afford one share. It has to be attainable and accessible to all'

'Some of us abroad we want to be involved also.'

'I am not sure a fan-based model will actually work, look mess other clubs have got into on this, there is a fine line to manage and I think owners who are committed to the club and its development is a requirement, the current regime are certainly not committed'

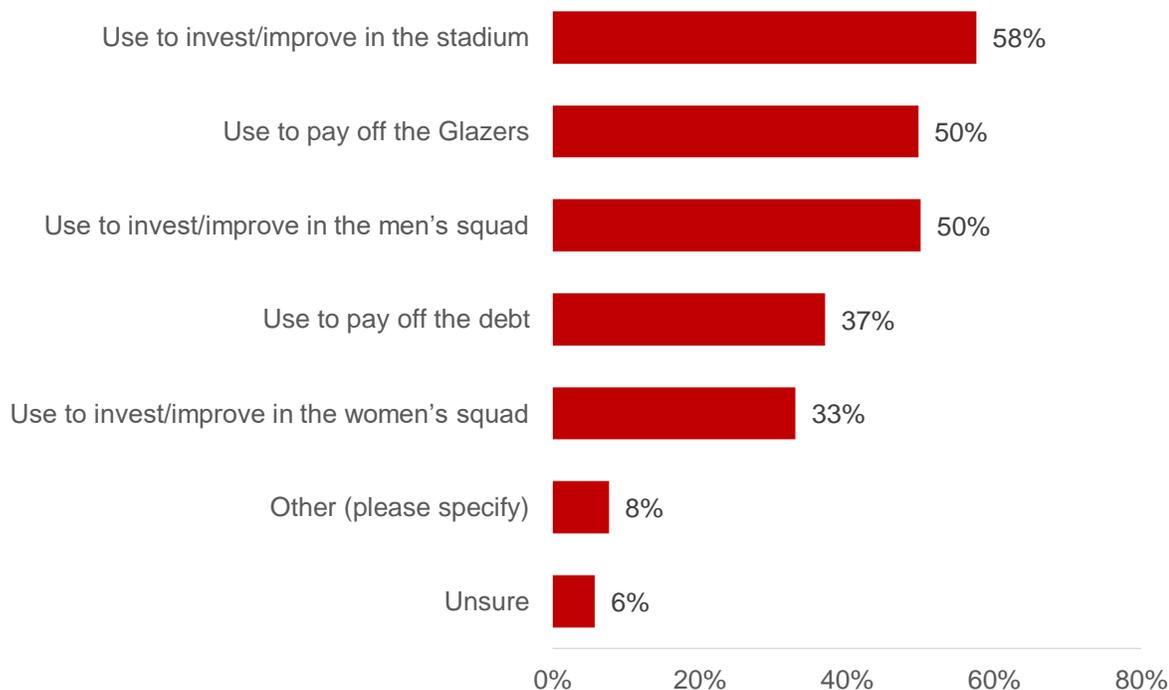
'I'd only participate if we got 50% of the club ownership within the next few seasons.'

I am worried that the Fan Share Ownership Scheme may never come to fruition. It was mentioned 6 months ago & nothing seems to have happened since. I am also concerned the number of shares offered by the Owners may just be conciliatory & may not allow Fans any real voice at the Club.

Filter: Supporters who may support Fan Share Scheme (224)

# From proceeds raised from the scheme supporters want to invest in the stadium and the squad alongside pay off the owners and debt

Q13 - Which of the following should be done with the funds raised from a fan share ownership scheme? Please select all that apply



The majority of supporters want the proceeds of the fan share scheme to be invested back into the club, whether that is to:

- Improve the stadium
- Improve in the men's or women's squad
- Buy out existing shareholders
- Pay off the debt

Half of supporters are also wanting the funds to be used to pay off the Glazers or would be willing to consider buying their shares to expedite new ownership.

These responses pre-date the club's renewed commitment to major stadium development and subsequent media interest. Education is needed around debt and the benefits of paying it off vs investment in stadium development.

Base: Survey Completes (n = 19956)

# Fan Share Ownership

## What you told us

Despite the limited communication of any detail at this stage, 51% of respondents were familiar with the proposed new fan share scheme and a further 45% were aware of it but not yet familiar.

58% were very likely and a further 24% likely to invest personally if the scheme is endorsed by MUST.

Concerns were expressed by many around equal voting rights, the limited scale of the offer and the limited influence that it will give us. It's clear a minority of supporters oppose any scheme on principle or because they believe it will have no impact on ownership.

Views on how any proceeds should be used are mixed but overall more support investment in the stadium (58%) or the playing squads (50%) than paying off the debt (37%) or the owners directly (50%).

These early levels of awareness and interest are highly encouraging, but we know that more will need to be done to reach out and translate this into an equivalent commitment from the wider global fanbase.

## Our Actions

We will feed these findings into our continuing negotiations with the club, ensuring in particular that identified challenges and concerns are addressed.

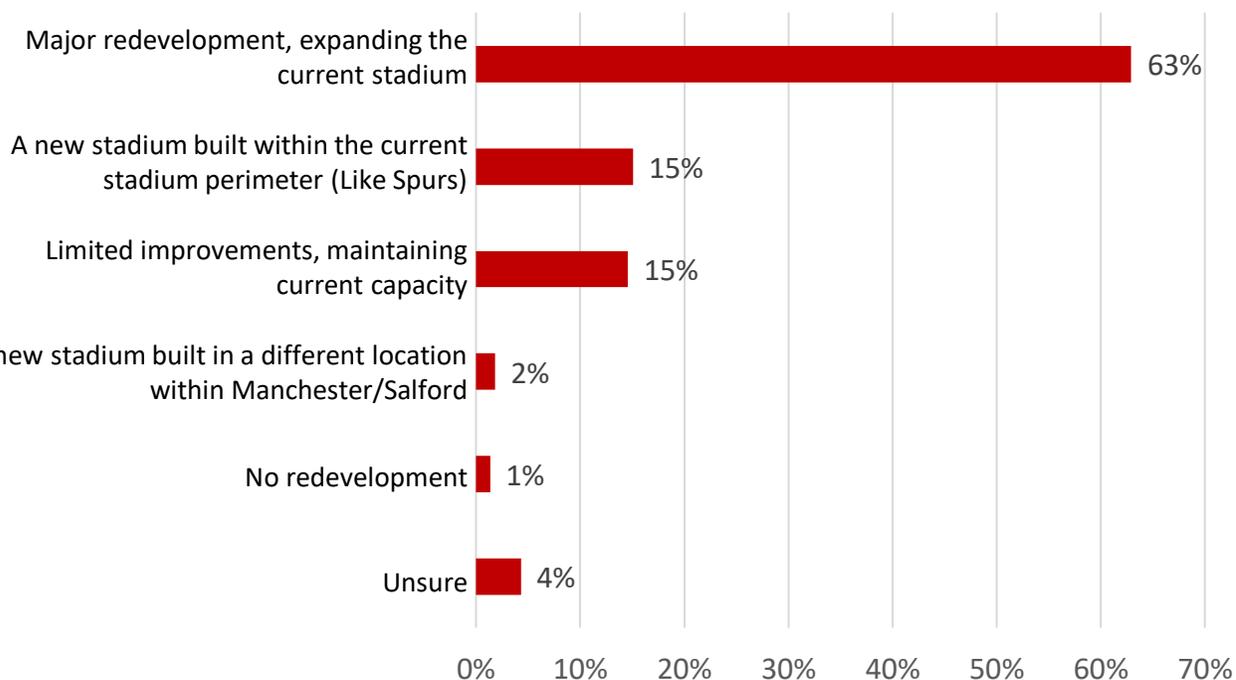
We will develop materials to explain the final scheme proposal and address the questions that have been raised.

In the event that a negotiated scheme is backed by our members in a democratic vote we will develop and deliver a major communications strategy to maximise the number of supporters purchasing shares in initial and subsequent offerings to progressively build the collective fan shares stake in our club.

# Stadium Development

# There is overwhelming support for significant redevelopment of Old Trafford

Q19 - Assuming all the following are technically and financially viable, which of the following options would you prefer?



80% of respondents want to see major redevelopment (expansion and modernisation) of the stadium in some form. This was also a significant theme in comments registered around how the club is being run.

In the absence of a clear alternative (new build option) and potential benefits, not surprisingly the majority of supporter would prefer the club to expand and redevelop the existing stadium. There is clearly an emotional attachment to Old Trafford in its original position

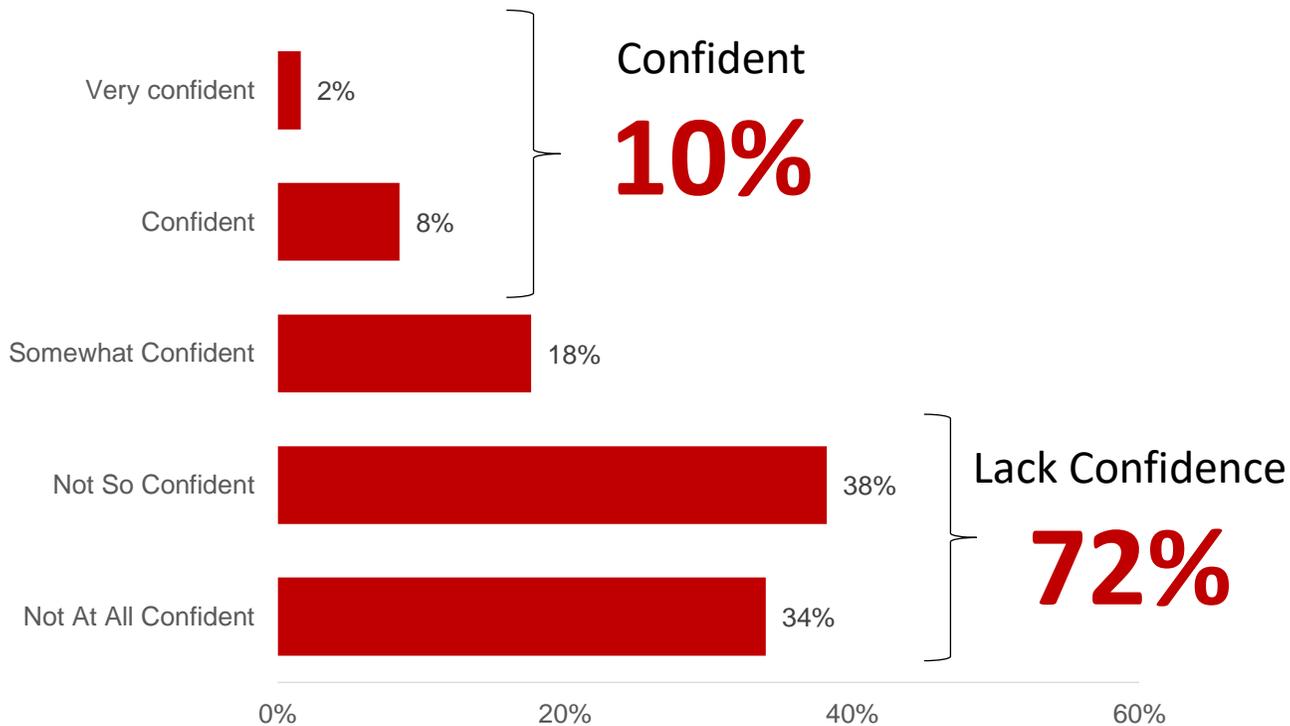
More Season Ticket Holders (22%) who attend more matches support the new stadium on adjacent land. Unsurprisingly there is no support for any more significant relocation.

View in this survey were provided before the announcement that the club is now exploring all options for redevelopment on the current site. It is important that supporters get the chance to provide an informed view on any confirmed options for either a new or redeveloped stadium.

Base: Survey Completes (n = 19956)

# But almost three quarters lack confidence that the owners will invest to improve the stadium capacity and facilities

Q6c -Major investment in the stadium infrastructure to expand capacity and improve facilities



Until recently there was little investment in Old Trafford beyond emergency repairs and executive facilities. This behaviour will be driving perceptions that almost three quarters of all supporters lack confidence that there will be major investment in the stadium (72%)

More recently there have been limited developments including (government mandated) expansion of disabled supporter access and the trial area for safe standing as well as executive facilities.

However, it is becoming increasingly clear that to keep up both internationally and domestically radical improvements are required. Just before Christmas (after our survey closed) the club announced that they were looking to appoint a Master Planner to oversee a significant stadium upgrade

Base: Survey Completes (n = 19956)

# Stadium Facilities

We asked match-going respondents to rate different aspects of their matchday experience in the stadium:

- 35% are very satisfied or satisfied with their seating (space & comfort) while 30% were dissatisfied. Executive (58%) and Disabled (74%) seat holders were more positive, the latter probably reflecting the significant recent investment
- Younger supporters (61% of Under 21s and 49% aged 21-40 are satisfied with seating. 42% of supporters in the Family Stand area are satisfied but 34% are dissatisfied
- Only 33% are satisfied with concourse capacity with a further 34% just somewhat satisfied
- The range, quality and pricing of food within the stadium is rated satisfactory by only 26% with a further 38% somewhat satisfied
- The range and pricing of alcoholic drinks is rated satisfactory by 30% with a further 39% somewhat satisfied. Soft drinks rate higher with 46% satisfied
- Kiosk service is rated satisfactory by 35% with a further 34% somewhat satisfied and 30% dissatisfied
- Other facilities (that we prompted may include wi-fi, toilets and tv screens) are rated satisfactory by only 19% with another 54% somewhat satisfactory
- Satisfaction with some facilities and services varies significantly around the stadium reflecting its piecemeal development over several decades.

# Stadium Development

## What you said

There is overwhelming (80%) support/demand for a major redevelopment of the stadium within the Old Trafford site. In the absence of full awareness and understanding of the options and their respective merits, retaining the current stadium was important for many. However views may well change with a side by side comparison of a new build vs redevelopment

Only 10% were confident that this would be an investment priority, despite the commitment made at the June Fans Forum.

Many aspects of the facilities in the stadium are poorly rated, in particular seating accommodation (only 35% satisfied), concourses (33%) the sale of food (26%) & drink (30%) and kiosk service (35%). Satisfaction with some facilities and services varies significantly around the stadium. These concerns highlight the limitations of the current stadium design and its piecemeal development over several decades.

## Our Actions

Respondents rank stadium development as one of its top three priorities for MUST to focus on in the next year

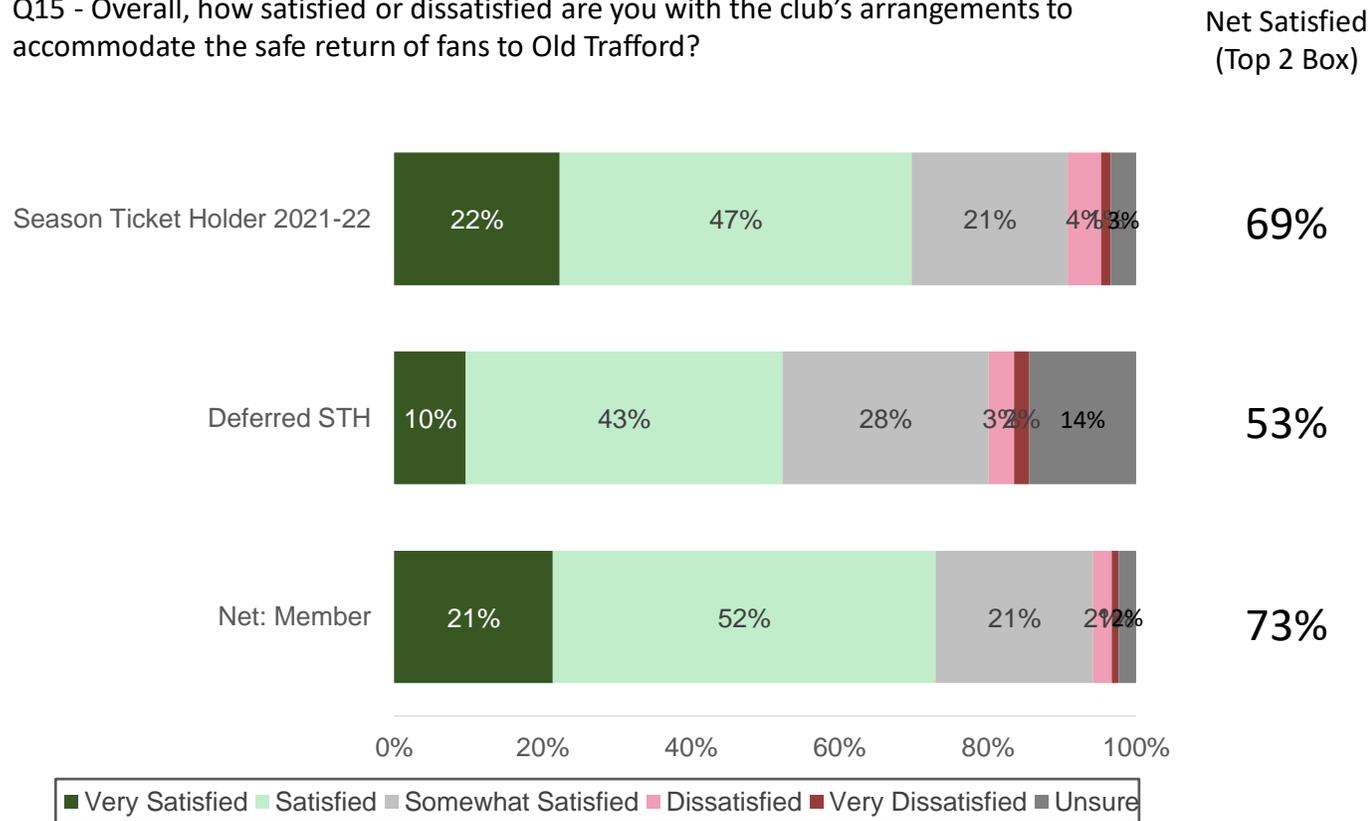
The renewed commitment at the December Forum to the development and delivery of a Masterplan for the modernisation of the Old Trafford site is welcomed but needs to be genuinely visionary, with committed timescales and full investment support

We are engaging with the club as a priority action to ensure that the masterplan is developed and progressed as a priority to its full potential We want match going supporters in particular to have an informed direct say in the decision process and subsequent design and delivery of the new Masterplan.

# Post-Covid Return of Fans Match Day Experience

# Overall, both Season Ticket Holders and One Members were satisfied with the clubs arrangements to accommodate the safe return of fans

Q15 - Overall, how satisfied or dissatisfied are you with the club's arrangements to accommodate the safe return of fans to Old Trafford?



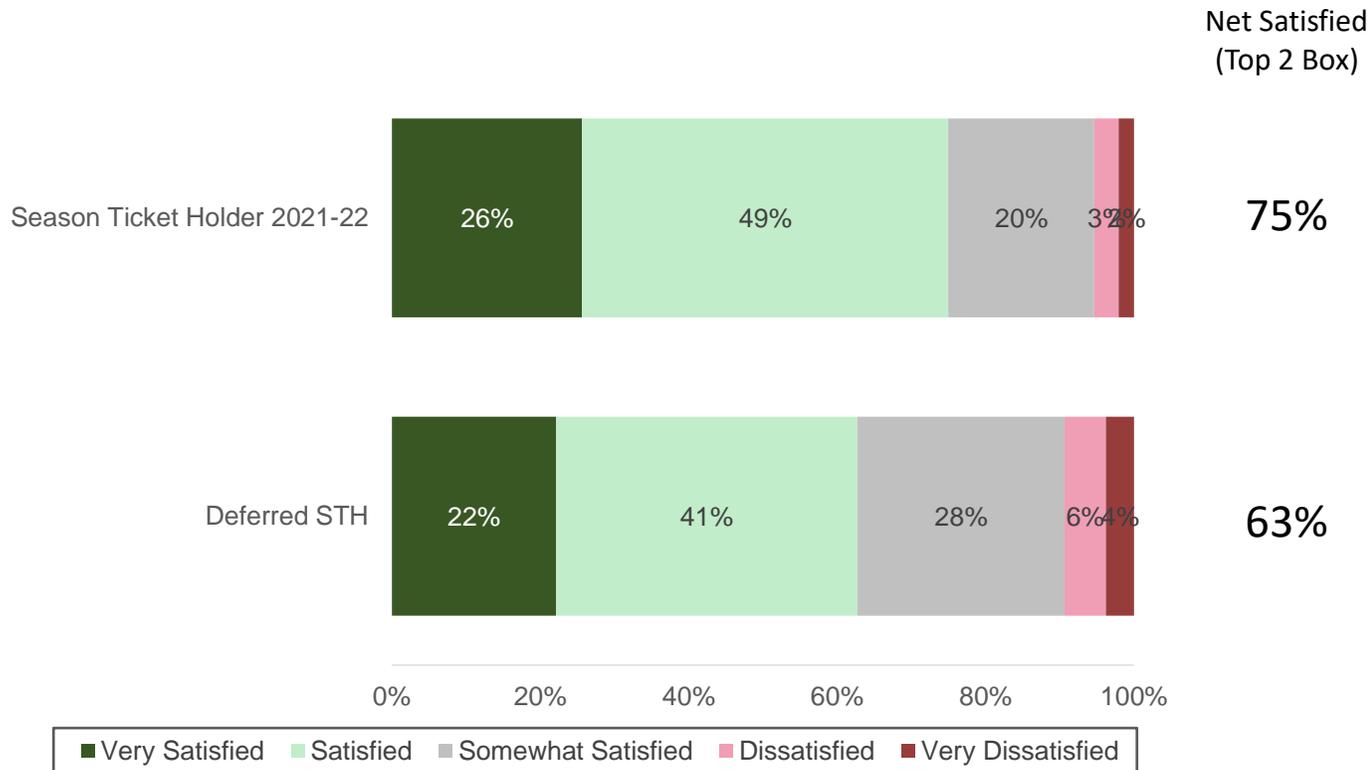
These responses are consistent with the positive feedback that we found in an earlier Covid related MUST survey of match-going fans.

Less than 5% of respondents were dissatisfied with the plans that the club put in place. Those who actually took up the option to defer their season ticket were slightly less positive.

MUST United Voice 2021; Base: Season Ticket Holders (3,488), Deferred Season Ticket Holders (408), One Member (2,177)

# Overall, supporters welcomed the club's option to defer their season ticket for 2021-22 although satisfaction was lower among those who deferred

Q16a - The option to defer your season ticket for a year if unwilling to return immediately



Season Ticket holders were satisfied with the approach/options the club offered towards deferring their 2021-2022 renewal.

However, it must be noted that amongst those who deferred, satisfaction is significantly lower.

There could be several reasons for this, for example the fact the club could not commit to holding their seat for 2022-23 or even it could just be that they didn't want to have to defer (i.e., not the club's fault).

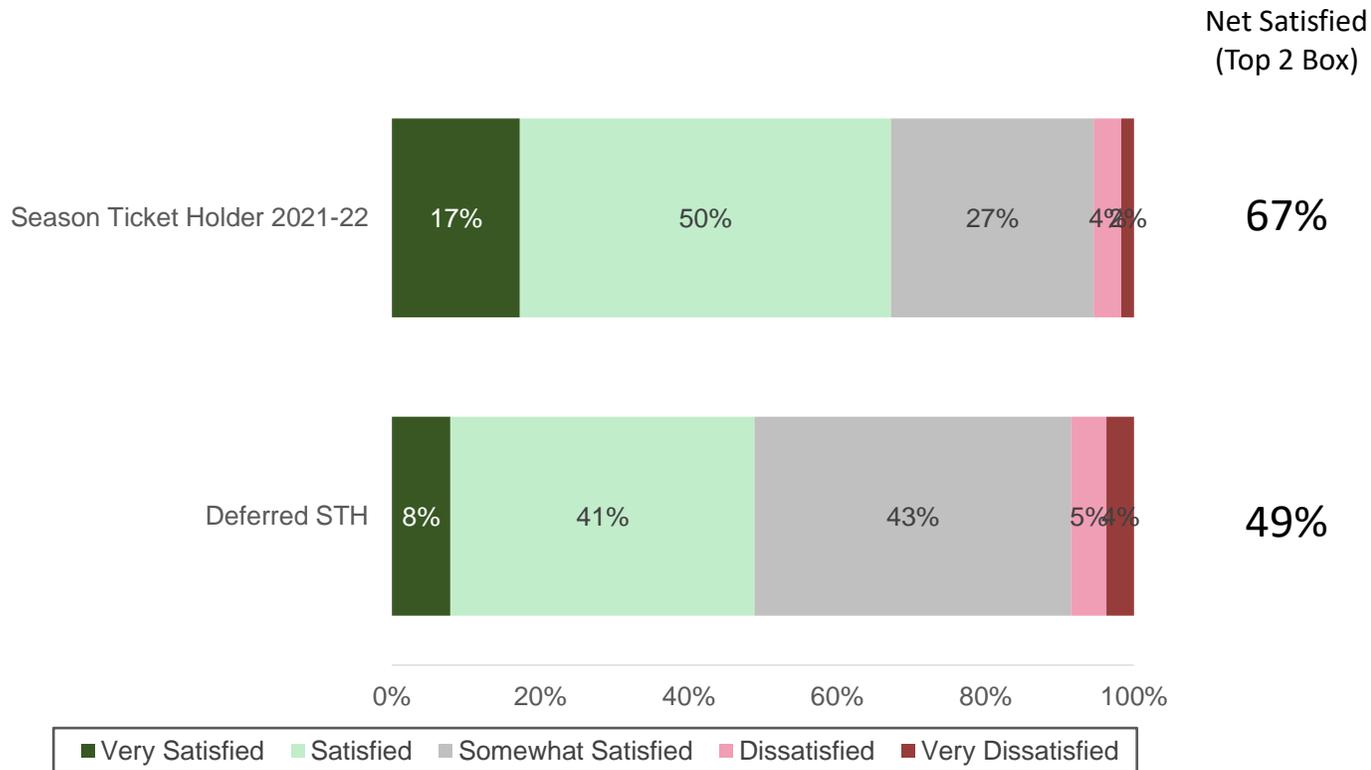
Overall we think that the solutions put in place struck a reasonable balance between the needs of the majority who wanted to return and the minority who had personal needs and concerns.

Some of the latter will have deferred primarily for financial reasons while others were more cautious about the personal health risks of returning.

MUST United Voice 2021; Base: Season Ticket Holders (3,448), Deferred Season Ticket Holders (408)

# Season Ticket Holders were also satisfied with the payment options offered for the 2021-22 season

Q16b - Additional options for payment of season tickets including new finance schemes



Most Season Ticket Holders were also satisfied with the additional payment options offered. Dissatisfaction was minimal and reflects the positive response by the club to concerns and ways of addressing them that MUST discussed with the club in the early stages of Covid lockdown and behind closed doors matches

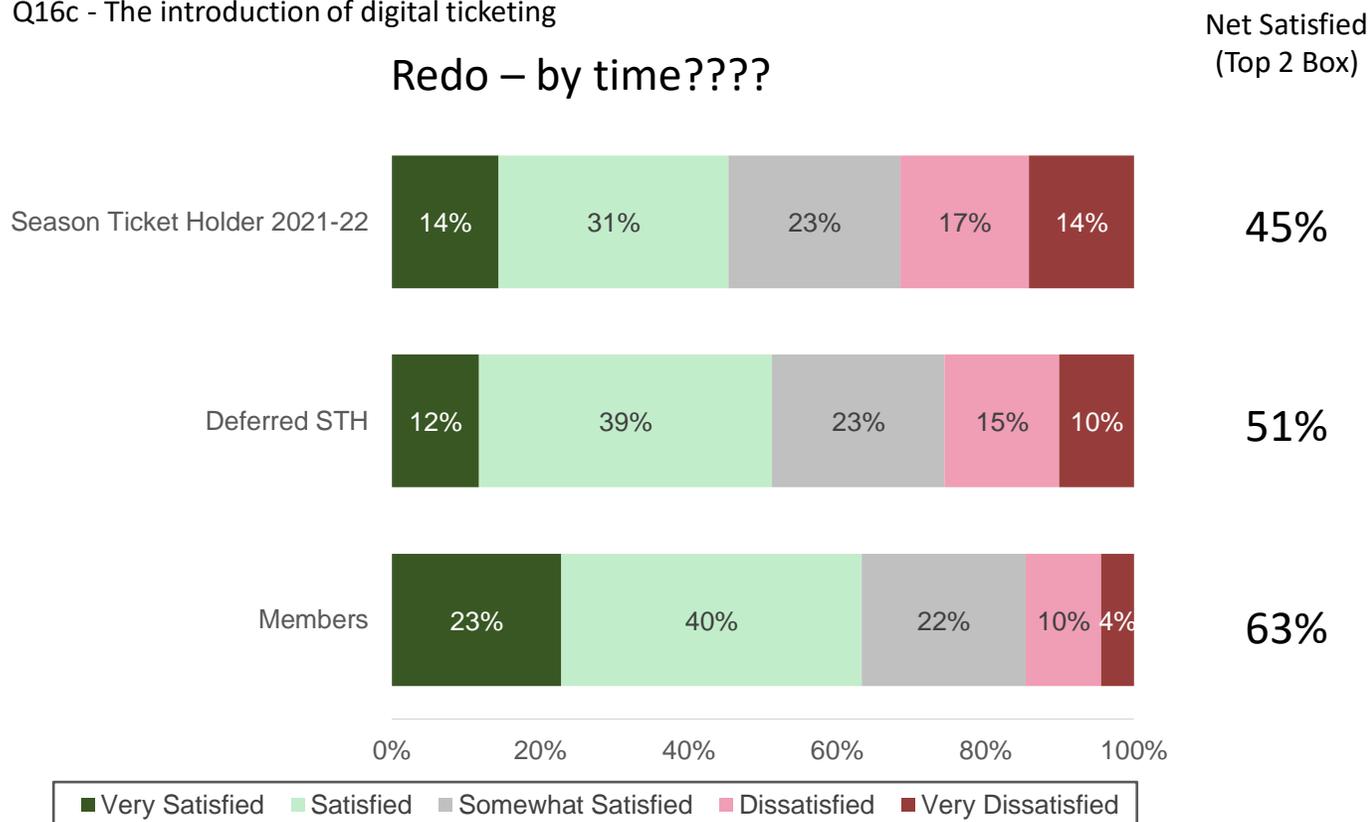
Again these responses are consistent with the positive feedback that we found in an earlier more targeted Covid related survey of match-going fans.

MUST United Voice 2021; Base: Season Ticket Holders (3,448), Deferred Season Ticket Holders (408)

# Supporter views are split over the introduction of digital ticketing, with a third of Season Ticket Holders dissatisfied

Q16c - The introduction of digital ticketing

Redo – by time????



Overall, the majority of match going supporters were satisfied with the introduction of digital ticketing, however a significant minority (31% of season ticket holders) were dissatisfied. Dissatisfaction also increases with age:

- Under 21: 19%
- 21 to 39: 21%
- 40 to 64: 23%
- 65+: 36%

When introducing new schemes, it is imperative the club considers the needs of all supporters to ensure those not au fait with technology have better support. However, overtime satisfaction with digital tickets has increased, as teething problems are overcome. –

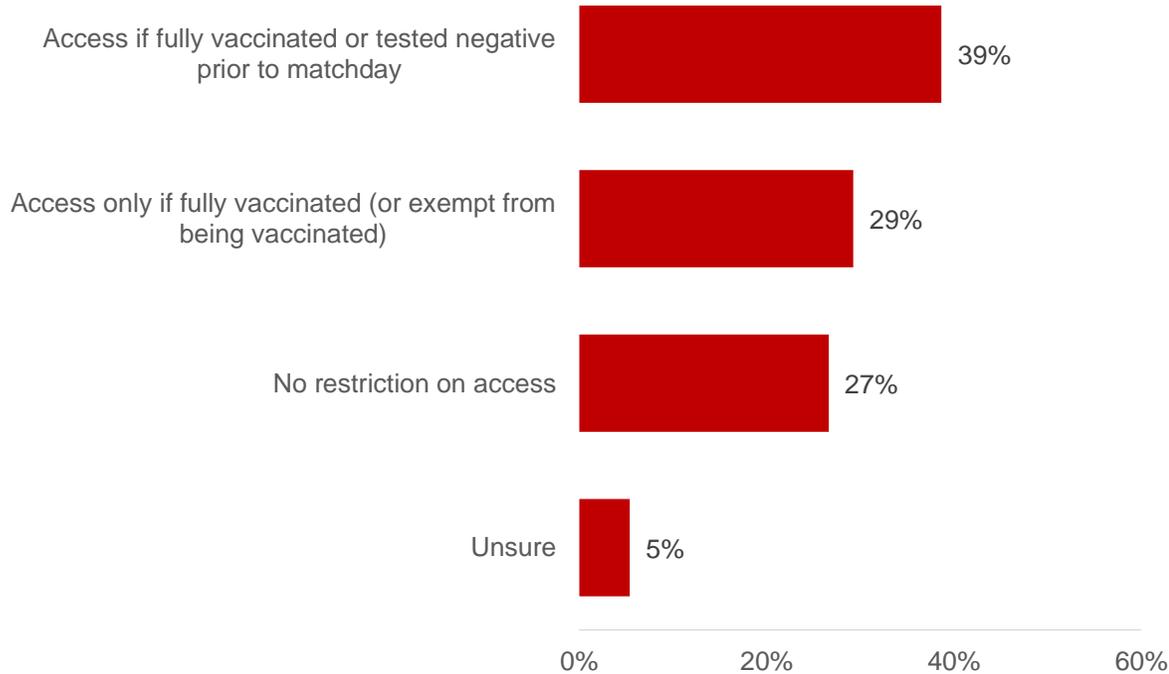
Completed survey in:

- October: 46% Satisfied (Top 2 Box)
- November: 58% Satisfied (Top 2 Box)
- December: 59% Satisfied (Top 2 Box)

MUST United Voice 2021; Base: Season Ticket Holders (3,448), Deferred Season Ticket Holders (408), One Member (2,177)

# Most match-going fans supported the temporary covid19 status on access to the stadium

Q17 - Regarding access to the stadium and COVID 19, if there was a choice, which of the following would you prefer



We asked this in September when the government had announced that 'Plan B' rules (access if fully vaccinated or proof of a recent negative test) may be introduced if Covid risks increased. We wanted to know how supporters would react in that event – which of course was put in place in December and has now been lifted.

It's clear that most match going fans were happy were supportive of some health controls on access and we advised the club accordingly.

MUST United Voice 2021; Base: Season Ticket Holders (3,488), Deferred Season Ticket Holders (408), One Member (2,177)

# Covid and Matchday Experience

## What you Said

The various actions that the club took, in close collaboration with MUST, to address the needs and concerns of match-going supporters over the course of the pandemic have been well received:

- **70%** were satisfied or very satisfied with arrangements for the safe return of fans to the stadium. Only 5% were dissatisfied
- **75%** were satisfied or very satisfied with the offer to defer a season ticket for the current season. Only 4% were dissatisfied

Those who actually took up the season ticket deferral option were themselves slightly less positive (**63%** satisfied or very satisfied), probably reflecting the loss of their previous seat location, although they are being prioritised for their reallocated seats for 2022-23

The response to the introduction of Digital ticketing at the start of this season was more mixed. **37%** of season ticket holders and **15%** of Official Members (who will typically have attended fewer matches) were dissatisfied .

This was a major change and there were significant issues over the first few matches, particularly relating to forwarding tickets. The system has since settled down and the improving satisfaction ratings over the duration of our survey returns (from 46% to 59%) reflects this. However it is also notable that satisfaction reduces significantly with increasing age, suggesting that those who may typically be less 'tech savvy' or resistant to change did not get the level of information and advice they needed.

## Our Actions

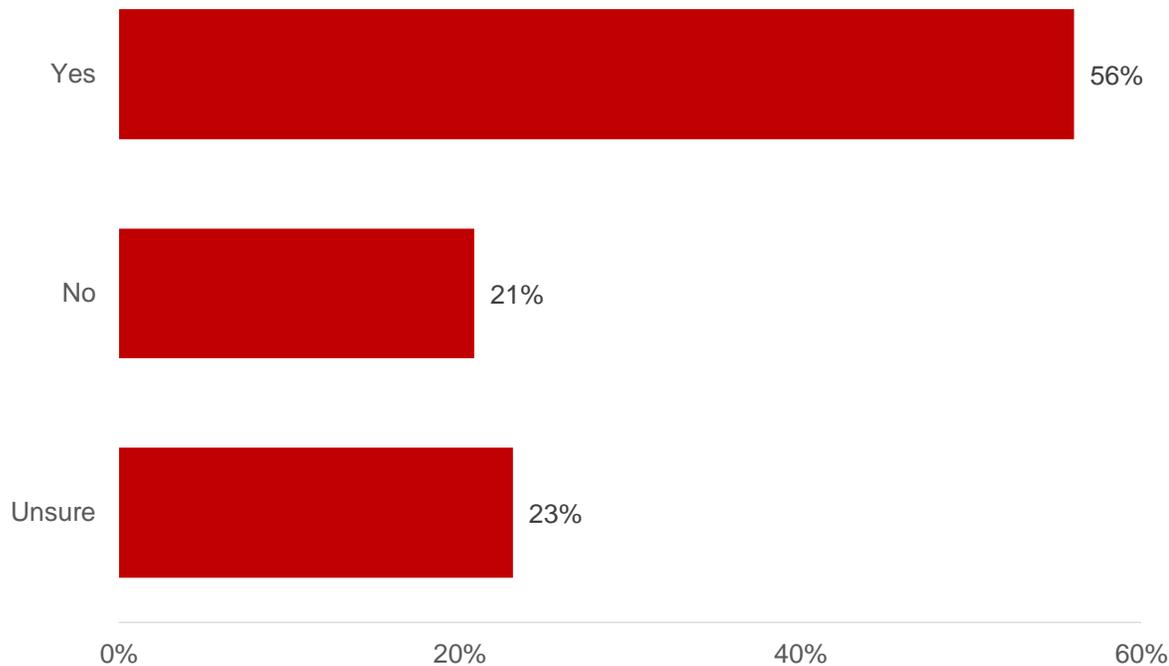
We will continue to work with the club and support those who deferred their season ticket and want to return next season

We will aim to work with the club on any future new systems and major upgrades to ensure better user input into design & testing and on launch advice and communication & support

# European Super League (ESL)

# Over half of all supporters fear the club will still support a new European Super League (ESL) proposition

Q20 - Do you think the club and other founding European Super league members will come back with a new proposition?



Football supporters remain concerned that the lessons of the ESL debacle will not be understood. We know that the owners of at least three clubs (Real Madrid, Barcelona and Juventus) still believe in the 'project and remain in legal dispute with UEFA.

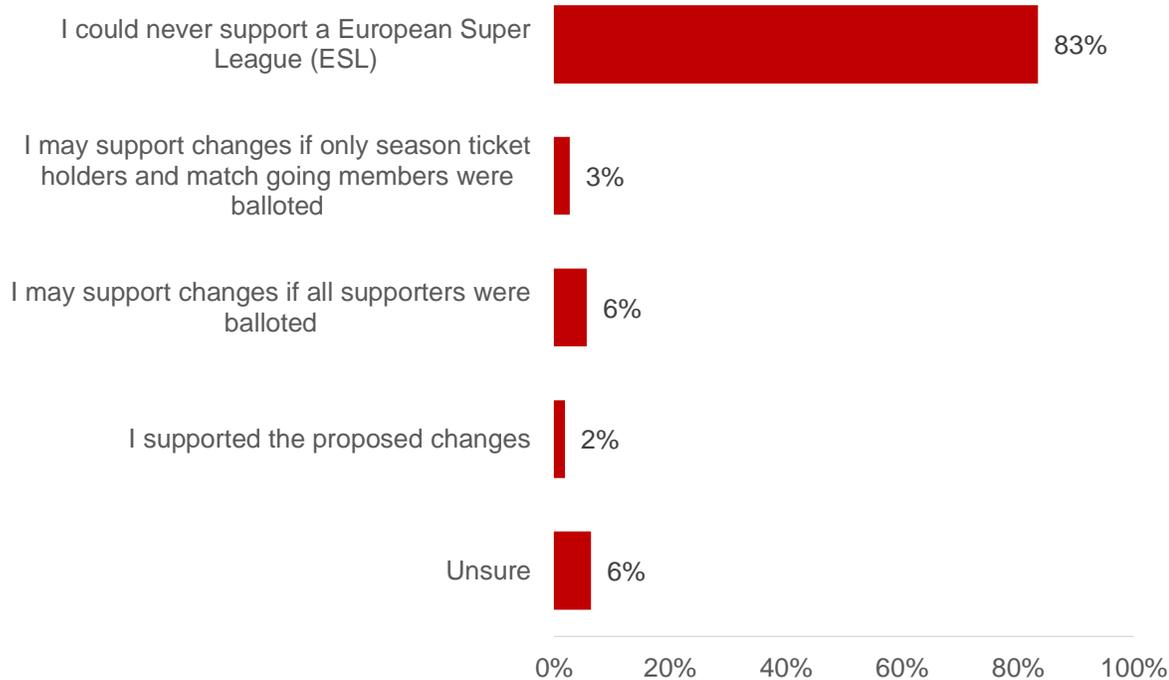
The lack of trust in the owners of the planned ESL consortium, including our own club, is apparent with well over half (56%) of all supporters perceiving that our club and others will return with a new ESL style proposition despite the uproar over the original ESL proposal and subsequent climb down.

Responses are consistent across all respondent types. Those who don't attend matches or who live outside of the UK are equally concerned.

MUST United Voice 2021; Base: All supporters (19,956)

# Over 8 in 10 could never support a new version of the ESL

Q21 - Which of the following statements most closely represents your views on the European Super League (ESL)?



We wanted to be clear about how United supporters would respond to any new proposal that retained the substantive features of a closed Super League

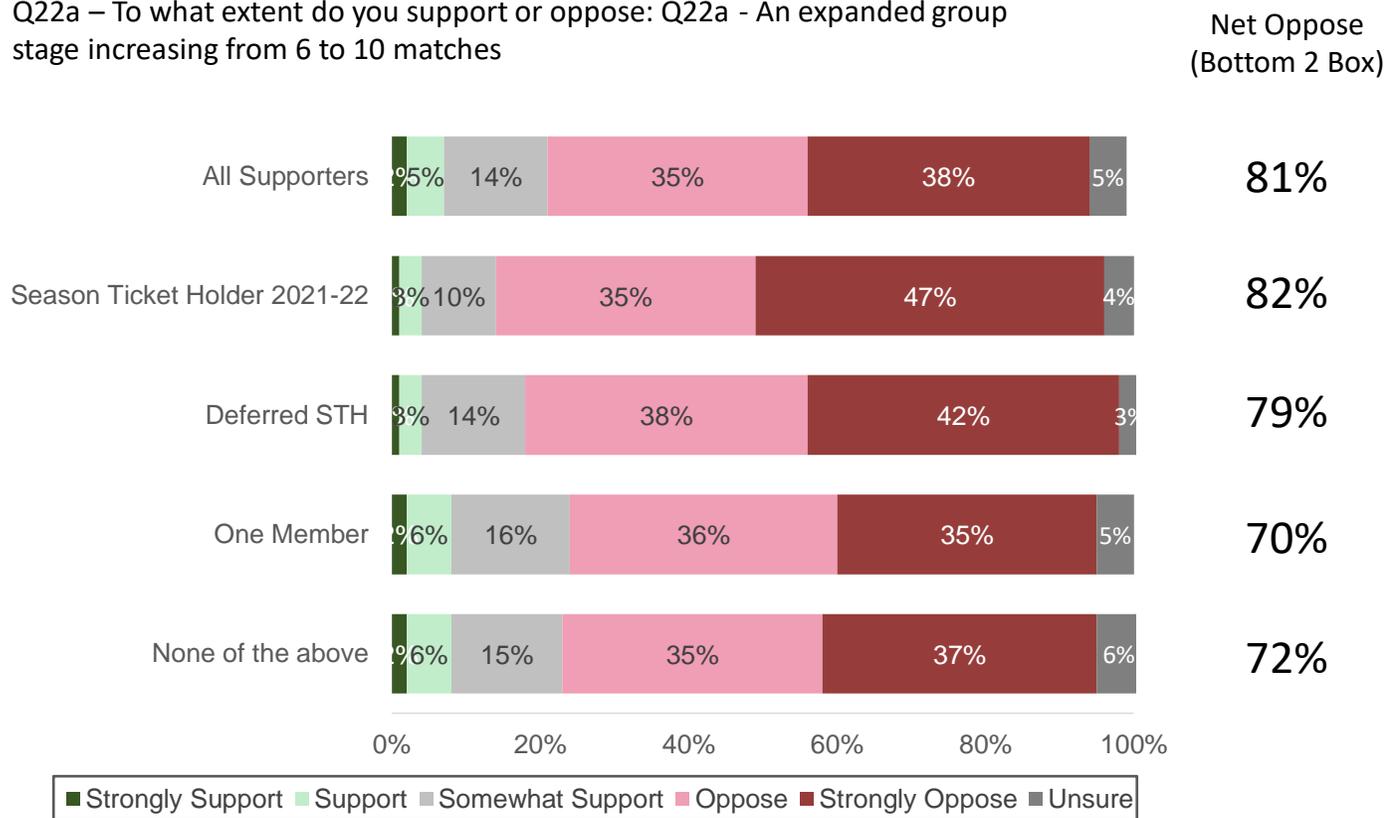
It's clear, irrespective of whether or not supporters are balloted, over four fifths (83%) of fans could never support a European Super League competition format if it is put forward again.

The strength of these views are consistent across match going and non-match going fans, all age groups and geographical locations

MUST United Voice 2021; Base: All supporters (19,956)

# And they don't want to see the Champions League become a substitute 'Super League'

Q22a – To what extent do you support or oppose: Q22a - An expanded group stage increasing from 6 to 10 matches



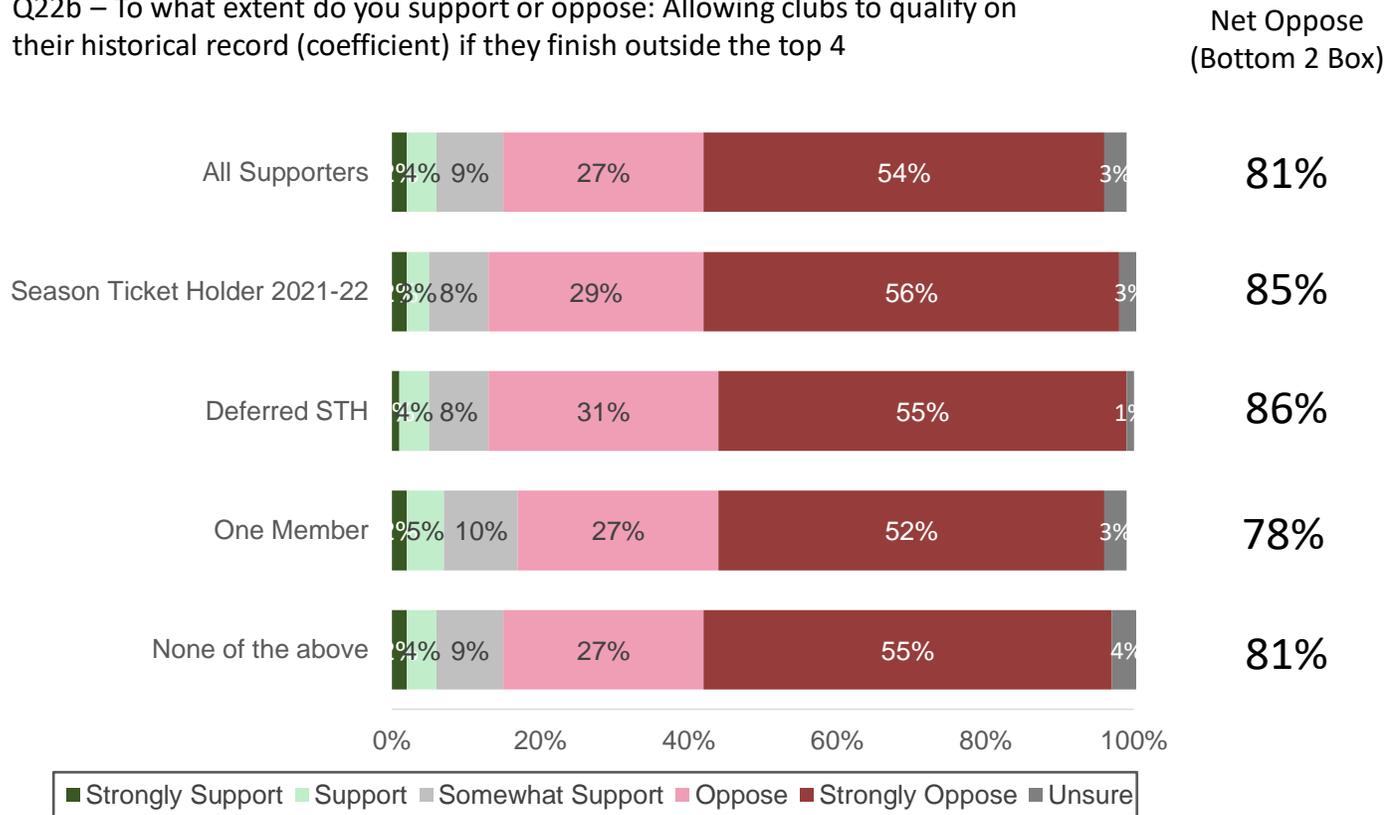
UEFA are progressing their own plans to revamp the Champions League and Europa Leagues, in part as a counter to the ESL that would be a major threat to their own future. Those plans include some of the radical format changes of the ESL, albeit still as an 'open' competition. We asked for your views on potential changes that we know have been promoted by UEFA and the bigger clubs including our own.

This is a significant level of opposition. Season Ticket holders (who, under the current mandatory Automatic Cup Scheme, would have to pay for more matches), are unsurprisingly the most opposed. Those who have never attended a match and/or live in the rest of the world are slightly less opposed but still record 65% opposition.

MUST United Voice 2021; Base: All Supporters (19,956) Season Ticket Holders (3,468), One Member (7,335), Non-member (8,656)

# Qualification for European competition needs to be based on current Premier League performance

Q22b – To what extent do you support or oppose: Allowing clubs to qualify on their historical record (coefficient) if they finish outside the top 4



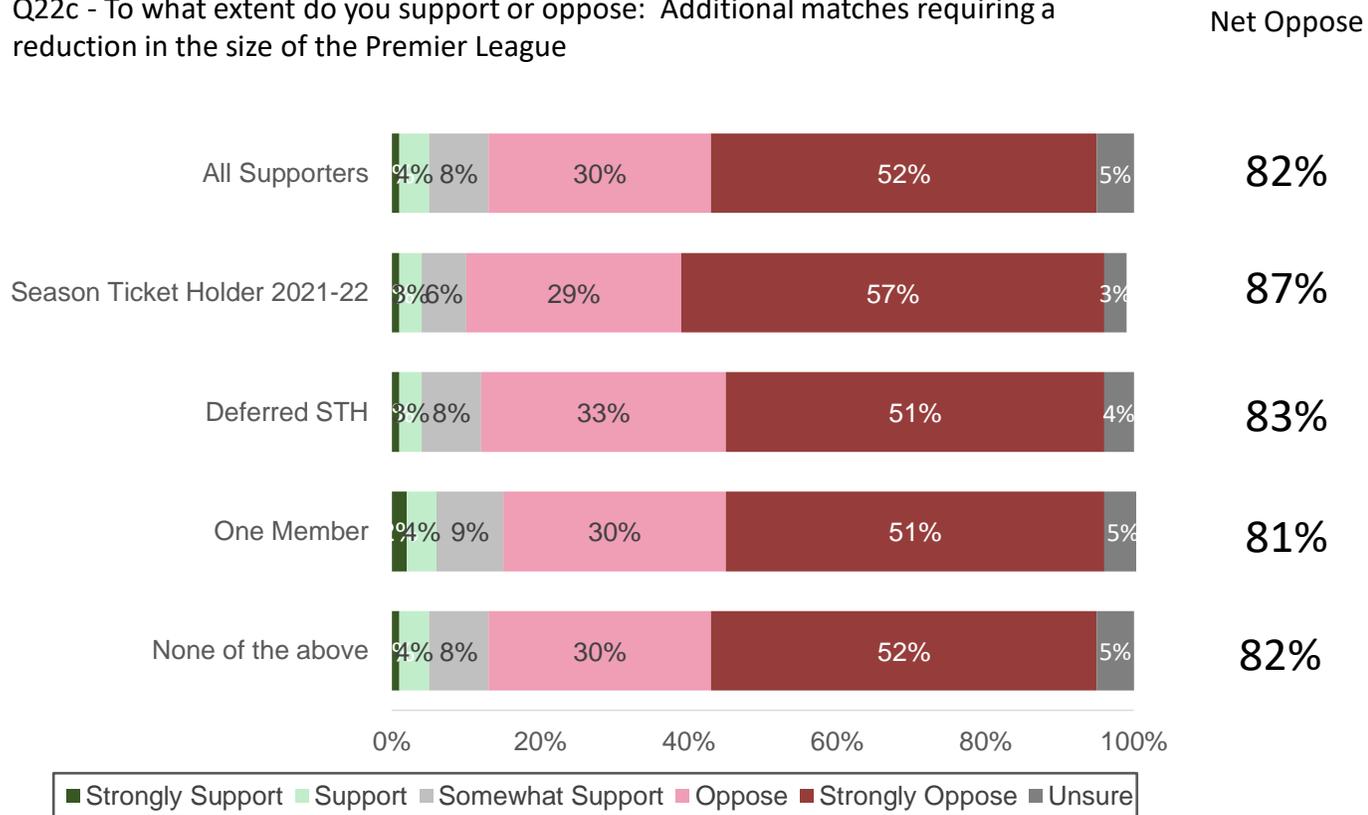
This addresses the idea that clubs who have qualified in recent seasons may still be awarded a place in the Champions League if they fail to qualify through their most recent season's league placing.

Although this would most likely benefit our club, there is a similarly high level of opposition. Those who never attend matches still record 75% opposition.

MUST United Voice 2021; Base: All Supporters (19,956) Season Ticket Holders (3,468), One Member (7,335), Non-member (8,656)

# And the Premier League should not be scaled down to accommodate more European matches

Q22c - To what extent do you support or oppose: Additional matches requiring a reduction in the size of the Premier League



The already congested football calendar means that one of the consequences of more matches in European club competitions could be a reduction in the number of clubs in the Premier League. Reducing it to 18 clubs would free up 4 matches.

Supporters are even more opposed to this potential change. 87% of Season Ticket holders value the Premier league and are opposed to this change. No other major group records less than 78% opposition.

MUST United Voice 2021; Base: All Supporters (19,956) Season Ticket Holders (3,468), One Member (7,335), Non-member (8,656)

# European Super League

## What you said

Despite the rapid reversal of the ill-conceived Super league plans that our club was part of, and the subsequent apologies and promises, **over half (56%)** believe that the ESL concept might be resurrected and only 21% are confident that it won't. In the event that it was proposed again **83% could not support it**.

Alternative plans by UEFA to reform and expand their own competitions are equally unpopular:

- 81% oppose an increase in group stage matches
- 81% oppose qualification through a historical coefficient rather than through league position
- 82% oppose any reduction in the size of the Premier league to accommodate more European matches

While opposition is highest from season ticket holders (who would be most affected), all other groups, including those who don't attend matches, record very high levels of opposition (65% against additional matches, 75% against the historical coefficient qualification and 78% against reducing the size of the Premier League)

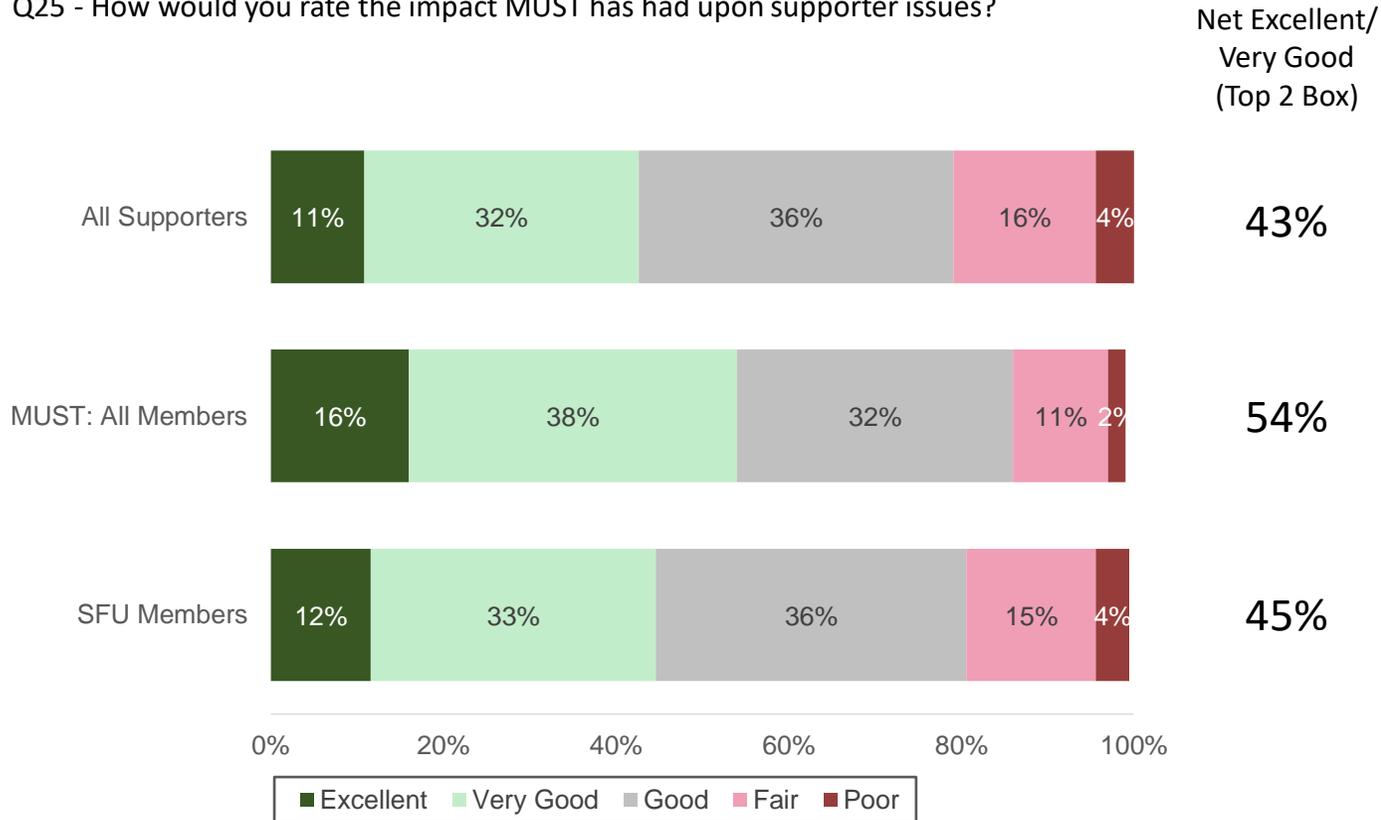
## Our Actions

We will report these findings to the club, making clear the extent of opposition across the fan base. At the least we would expect a full consultation with supporters on these important competition issues that were of course the immediate trigger for the government's Fan Led Review

# MUST performance

# The impact MUST has had on supporter issues is overwhelmingly positive

Q25 - How would you rate the impact MUST has had upon supporter issues?



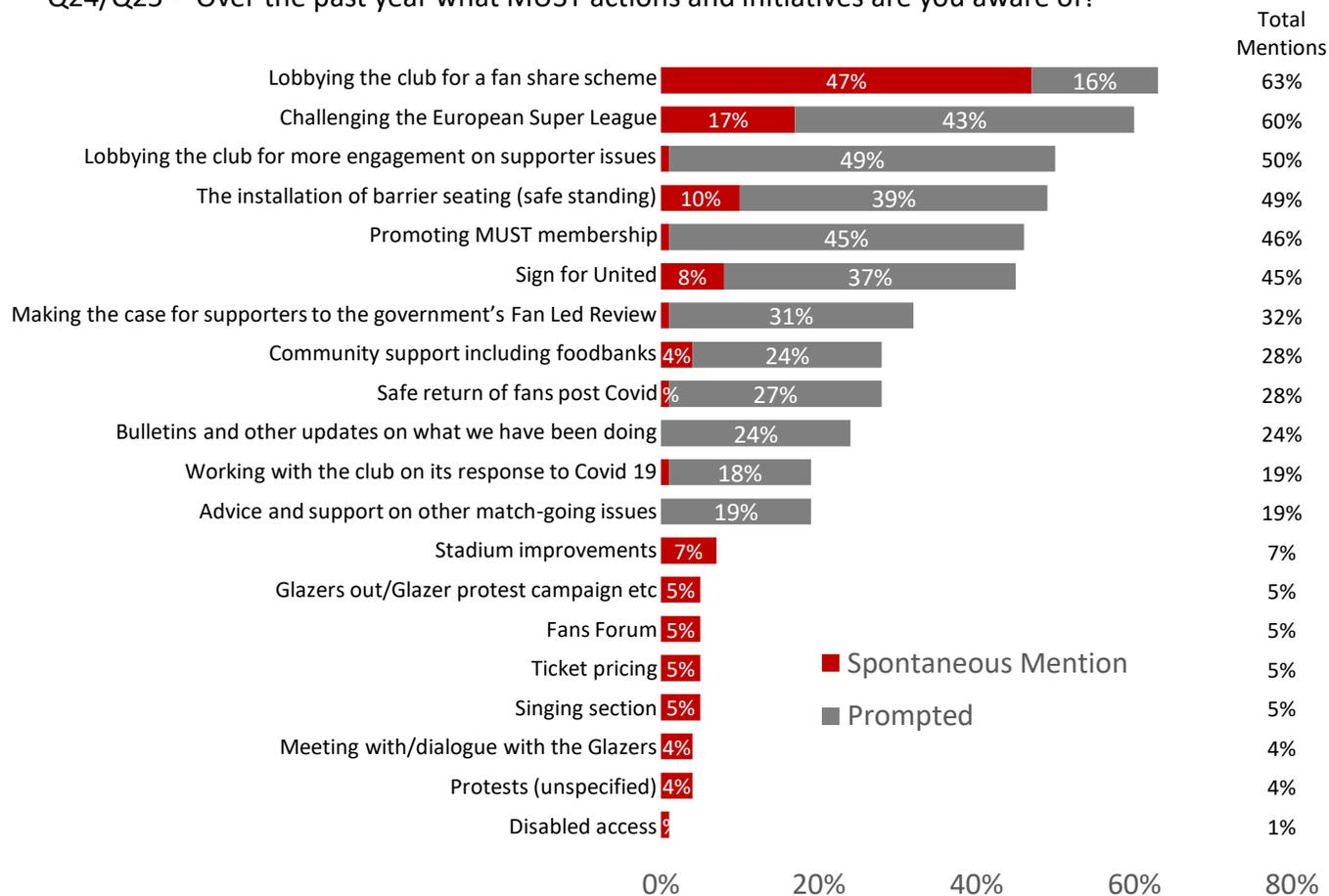
The positive response probably reflects the high profile issues that we have been involved in over the last year, notably the European Super league, the fan share scheme and the trial installation of safe standing, and the success of those actions.

While our registered members rated us highest, it is encouraging that others also recognise the work that we have done and the achievements that we have delivered over the last year.

MUST United Voice 2021; Base: All Supporters (19,956) All MUST Members (7,842), Sign For United Members (14,543)

# Almost two-thirds of all supporters are aware of MUST's work around the fan share scheme

Q24/Q25 - Over the past year what MUST actions and initiatives are you aware of?



Supporters are well aware of the work MUST has done around:

- The fan share scheme
- Challenging the ESL
- Lobbying the club on supporter issues
- Safe Standing
- Promoting MUST membership
- Sign for United

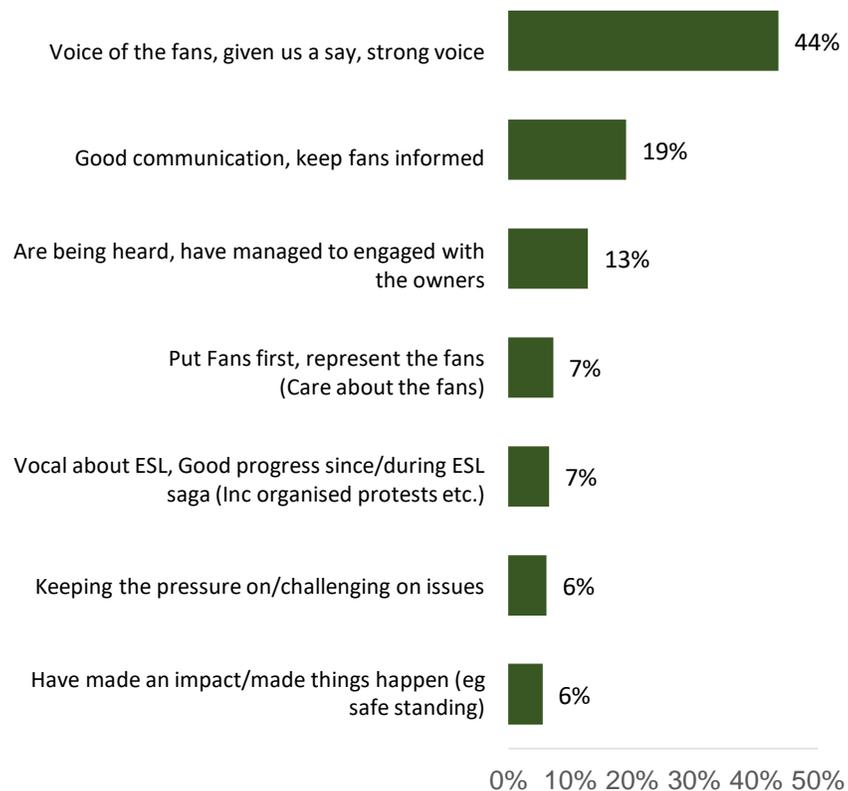
Communication is key. Unsurprisingly the more supporters are aware of MUST actions and initiatives, the more positively they have rated us

MUST United Voice 2021; Base: All Supporters (19,956)

# Reasons cited: 'Excellent / Very Good'

## Provides supporters with a strong voice, communicates well & engages owners

Q26: Why did you say MUST have been Excellent or Very Good?



'It's good to know that the fans voices are strong enough to challenge the ownership.'

'At making our voices heard. At getting the Glazers to speak to fans. At making sure they know we oppose the ESL. Trying to bring about change for the better of the club!

'I feel they are a real voice for the fans towards the owners of the club.'

'Making ordinary supporters aware of what needs to be done for/at the club going forward.'

'I have liked MUST continuing to update supporters regularly following the Super League debacle from the club. They have engaged us with Sign For United and keeping us informed with the fan ownership scheme.'

'MUST have made the Glazers listen to the fans. They have represented us and given us a say how on how the club has to move forward.'

'Supporters need a voice which can engage with the powers that be in Old Trafford and MUST does this very well'

'Because they have been a major voice for us the fans and trying to help us get our club back from the poisonous glaziers who are bleeding our club dry.'

'Because they work tirelessly on the fan's behalf. The Glazers wouldn't take any action if MUST weren't forcing them.'

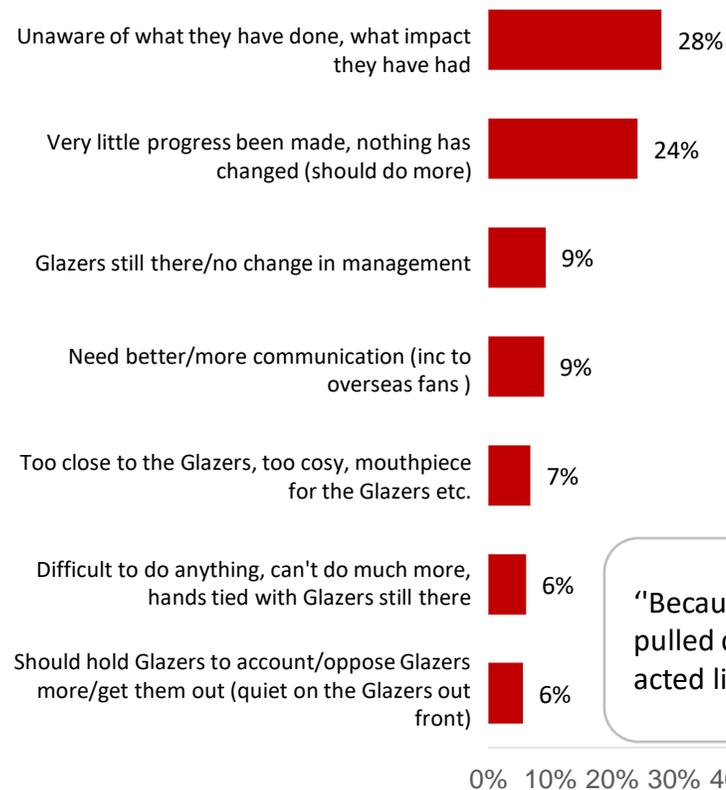
'Communication is good and there appears to be some traction on the issues raised'

MUST United Voice 2021; Base: All Supporters – Those responding rating Excellent/Very Good (1,026)

# Reasons cited: 'Fair / Poor'

## Focus on communicating successes, generate a broader reach

Q26: Why did you say MUST have been Fair or Poor?



'I am not fully aware of everything they have been involved in and feel that they should promote themselves more effectively do more supporters are aware of what they do'

'I can only speak from my limited experience of joining MUST but I fail to see anything other than raffle prizes.  
The Glazers have disappeared again as usual & nothing will happen. Nobody can hold them to account'

'Because i am only now understanding what MUST has been doing. I've not up to this time been aware of MUST's activities at all as an overseas supporter of MUFC.'

'Because no significant changes has been made. The talk about removing the Glazers has been on-going for 16 years with absolutely no result.'

'Not aware of many of the initiative's made in past year with nowhere near enough pressure placed on the Glazers to change.'

'I am 45 and never had any dealings and supported united all my life , I use other fan forums nothing personal just you have never reached me'

"Because they have had their pants pulled down by the Glazers and have acted like a lap dog to The owners.'

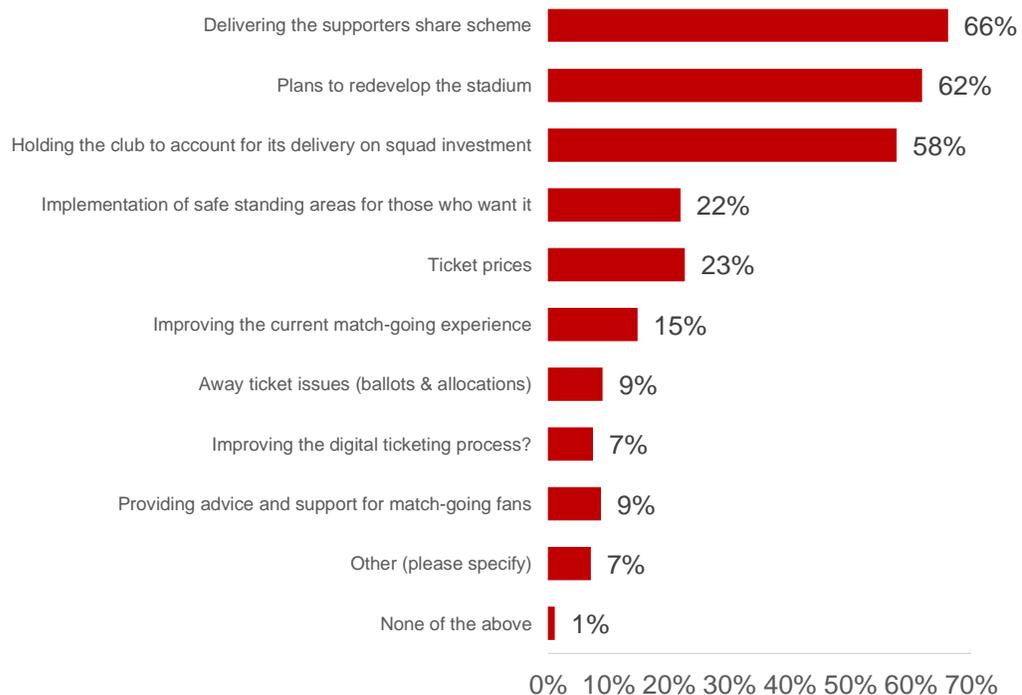
'As I'm not aware of anything they have done I have no other response but poor.  
Whatever it has been it hasn't exactly set the world on fire, has it? Glazers still there, sucking the club dry while we are sh#t on the pitch.'

'I have seen some communication and action but as of yet, no major changes are apparent'

MUST United Voice 2021; Base: All Supporters – Those responding rating Fair/Poor (402)

# Delivering the fan share scheme, redeveloping the stadium and holding the club to account on squad investment are the 3 main priorities for supporters

Q27 - Which of the following should be the three most important priorities for MUST for the year?  
Please select up to three



This is a strong steer from supporters with three very clear priorities.

MUST United Voice 2021; Base: All Supporters (19,956)

# MUST Performance

## What you told us

Almost 80% of respondents rated MUST's performance positively, with 43% rating it excellent or very good.

Registered members, who will be the most informed on our activities, understandably rated us highest but other respondents were also very positive

We received the most recognition for our work around the European Super League, the fan share scheme and safe standing (that was finally delivered into Old Trafford – at least as a trial).

A minority of supporters continue to oppose MUST or see us as not doing a good job for them. We will learn from the constructive comments that some have provided.

Supporters are very clear that our priorities over the next 12 months should be the Fan Share Scheme, stadium development and holding the club to account for its delivery.

## Our Actions

We are ramping up our activity with a clear focus on the three priorities that supporters have identified

We have recognised and are acting on the need to improve our communications with members and the wider supporter base.