

# United Voice 2021-2022 Summary Report

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MUST

March 2022

# Headlines

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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

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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.

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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

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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

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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

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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.

# 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

## 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% of them 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 and 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

## 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

## 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 options in the new Masterplan.

# 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

## 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%)** fear 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

## 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).

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 the need to improve our communications with members and the wider supporter base.