

WHITEPAPER

Get Fans Back to the Stadium

How a great stadium experience
boosts fan loyalty





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Introduction

Sports have always been an essential part of our culture, from the earliest form of football in ancient China, to the spectacle of the Colosseum in ancient Rome. Sports and entertainment leaders around the world have long understood the importance of atmosphere and excitement in keeping fans happy and engaged.

Fan engagement is fundamental to driving these fans to the stadiums, convincing them to spend over \$50 billion annually on their favorite teams and leagues, and developing bonds strong enough to push a fan **from their first game to a lifelong attachment**. This engagement is a cohesive whole that includes not only a fan's experience watching games on TV or through streaming media, but their **experience interacting with teams year-round**.





The Stadium vs. The Home Experience

Today's stadiums face **increasing competition** from improved home-viewing options, powered by better camera angles, the growth of AR/VR, and multiplatform, multimedia experiences, not to mention the comfort of not having to leave one's own living room. At the same time, the monetary cost and time commitment of stadium attendance remains high, with 100,000 people whose jobs depend on matchday activities in the UK alone. As a result, while revenues for teams have steadily increased, stadium attendance has stagnated or decreased slightly across many sports leagues.



In today's world, **organizing games is not enough to make the fans come.** In order to win fans today and to keep them coming back in the future, stadiums not only need to get the basics right, beginning with the core expectations of fans, but they should **elevate the experience** as stadiums compete with the home experience on attributes that make up “the playing field of today.”

Research shows that success across these elements ultimately can lead to more satisfied fans, who are more **emotionally connected** to the team. These emotional connections drive **fan loyalty**—pushing fans up the tiers of fandom, from casual fans who occasionally engage with teams, to “love it” fans and ultimately, to fanatics. This **loyalty, in turn, drives business results:** increased ticket sales and increased in-stadium purchases.



The 4 Core Expectations

Fans, whether they are young or old, fanatics or casual fans, have a **“core four” set of expectations** when they arrive at the stadium, complemented by a set of other basic needs.

Success across these four points is of vital importance for establishing a base of engaged and satisfied fans that repeatedly attend games in-stadium instead of watching games from the comfort of their own homes.

Fans' core four expectations are the following:

They expect the stadium to be safe, comfortable and clean

They want the view from their seats to match their expectations

They desire a high-quality game

They expect an exciting atmosphere within the stadium



Today's Challenges

Once stadiums have enticed a fan to come to a game, it is important to go beyond the basics, delivering a **fan experience that will keep today's fans returning to the stadium**, as well as spending their time and money on merchandise and other goods and services. The next level of experiential elements—the playing field that stadiums compete on today—includes:

Personal identification with the team

The ability to have experiences that are unique to the stadium

Experiences that match their personal interests

Live entertainment options before, during, and after the game

The opportunity to sit with fans who share their interests





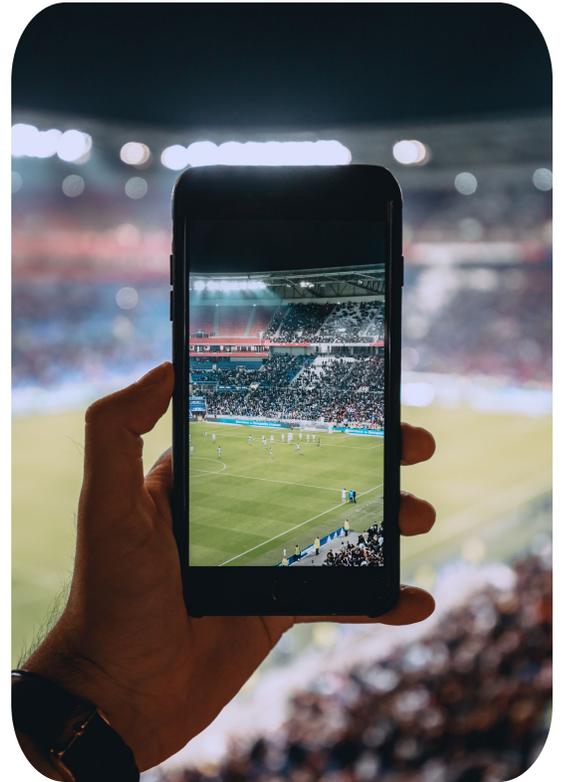
Personalization, personalization, personalization

However, increasing the satisfaction score across these elements may not be as simple as bringing in bigger entertainment names, doing more interesting giveaways, or setting up specialized fanatic sections in the stadium. Rather, what stands out about these attributes is the **focus on personalization**, and truly knowing and **understanding the individual fans in their stadiums** as well as their specific interests. Given the relative importance and dissatisfaction with these experiential attributes, particularly for younger, next-gen fans, teams should prioritize building a robust understanding of their fans' behaviors, creating a **360° single view of the customer** that can be used to deliver personalized entertainment options as well as mechanisms to foster in-stadium communities of fans. Furthermore, teams must look to communicate these options in a cohesive and coherent way that speaks to **each fan as an individual**, emphasizing the **true personalization of the experience** and offer that is being presented to them as part of their time in the stadium.





There is significant room for innovation to elevate the connected, mobile experience to link fans, helping them with some of the “basics,” as well as introducing new, unique experiences captured in today’s differentiating attributes that they care most about. These innovations could include areas such as connecting fans to others who share their passions, tapping into the important attributes covered by providing access to the unique activities and entertainment options that match their personal experiences, and providing access to unique in-stadium experiences. The key for each of these innovation areas will remain to **integrate seamlessly with the rest of the stadium experience** without interrupting the excitement of the stadium atmosphere. To incorporate these differentiators, teams have developed seating sections for specific groups of fans, AR/VR experiences within the stadium, improved wireless access, customized mobile content, and competitions for fans in the stadium. While all of these individually are likely to raise fan satisfaction levels marginally, real improvements can be made through the creation of an **integrated platform across the unique experience elements.**



This would further the integration of mobile to develop and foster social fan connections and communities within the stadium while enabling teams to **learn key details about individual fans** and their preferences. Such learnings permit teams to direct fans to experiences they will identify with in the moment. Moving forward, these innovations will be critical to the continued success and viability of the in-stadium experience as **out-of-stadium competition grows stronger**, and as the younger fans that are growing into increasingly large percentages of sports fans over the coming years identify less and less with the individual team that they come to the stadium to watch.



Conclusion

As teams look to drive increases in repeat attendees and season ticket holders, while broadening their base of fanatics - the groups responsible for the highest levels of spending on tickets and in the stadium - increasing fan satisfaction is paramount through the creation of a cohesive in-stadium experience. **Fans who are more satisfied attend more games relative to their level of fandom.** In the case of the WNBA, fans attend approximately 40 percent more games per year at each level of fandom compared to the average across the other leagues. Not only did those fans attend more games, they spent more per ticket, showing strong overall correlation between satisfaction and total season spend on tickets. To allow teams to achieve this benefit both in terms of in-stadium support from fans and for teams' bottom lines, teams must first **ensure that they have addressed the basics.** They need to put a compelling, high-quality team on the floor, in a clean, safe, and comfortable stadium with seats that have quality views matching fans' expectations, and they need to foster an exciting, energetic environment.

Once they have addressed the core four attributes that dominate fans' relative importance, teams can focus on addressing the rest of the basic needs and **building a team persona** through their in-stadium, broadcast, and **year-round engagement strategy** that fans feel they can identify with. By addressing these basic attributes, teams will cover the fundamentals of in-stadium fan engagement, encouraging fans to come to the stadium. As broadcast and streaming channels continue to improve, teams will need to go beyond these foundational elements to **elevate, personalize, and connect** the disparate elements of the in-stadium experience. They will need to compete across the attributes that make up the stadium playing field of today, and **differentiate with new experiences such as mobile** to continue to draw fans in the future. To truly develop these offerings, teams will need to cultivate a **deep understanding of their own individual fan bases** to personalize sets of offerings to individual fans—continuing to lift the experience of the stadium above that of the home.



FANVIEW

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