

Gemba[®]

JULY 2024

EVOLVING THE EVENT EXPERIENCE

A research report which explores the European fan experience
before, during and after sport & entertainment events

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FANS WANT MORE

At Gemba, we're passionate about fan experience and work with Europe's leading stadiums, venues and rights holders.

We surveyed thousands of fans to understand what they really want pre, during and post event to improve their overall experience.

What we found was the value exchange between a fan who invests their time and money into travelling and experiencing the event, is not always reflected in the all-round package offered back to them.

With the fight for share of time, wallet and sessions only becoming more ferocious, sports and entertainment venues and stadiums must continue to step up their game to compete.



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KEY FINDINGS

01

We conducted a nationally representative survey among fans who attended an event in the past 12 months

RESEARCH METHODOLOGY

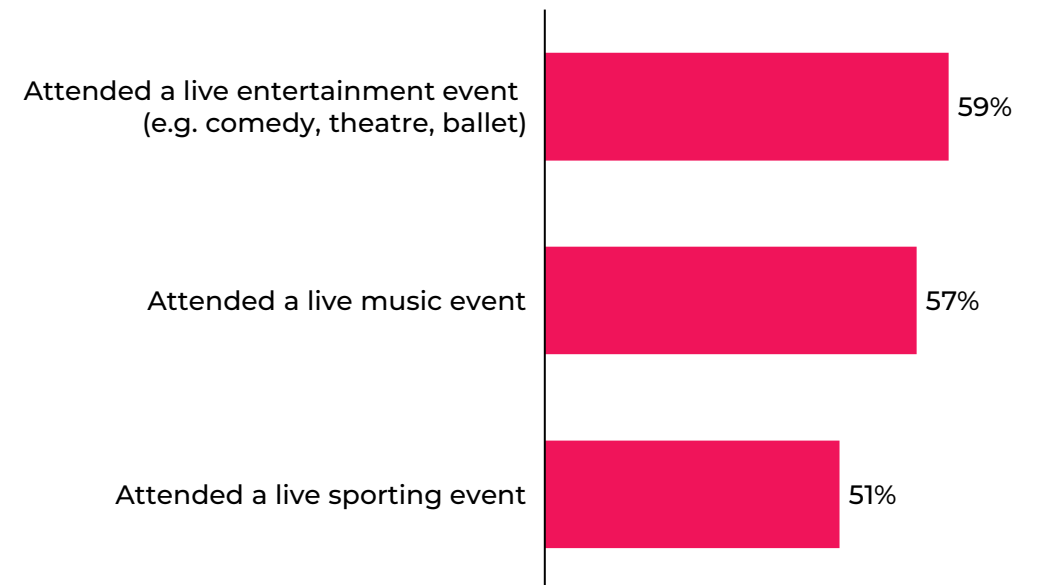
METHODOLOGY

- A nationally representative 15-minute online survey was conducted among n=1,851 United Kingdom residents aged 18 and over who have attended a live sport, music or entertainment event in the past 12 months
- The sample was post-weighted to be representative of gender, age and location in the United Kingdom

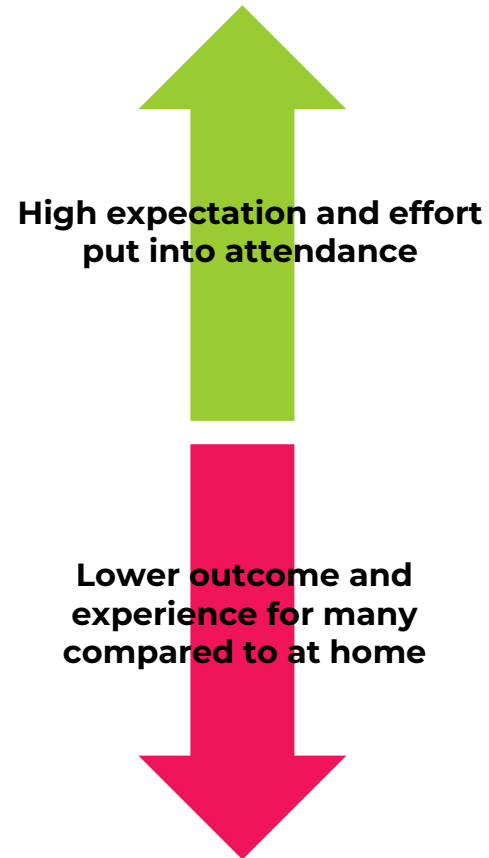
NOTES

- The survey was conducted from 12 February - 25 February 2024
- The maximum margin of error on a sample of n=1,851 is +/- 2.3% at the 95% confidence interval for results near 50%. Margins of error are higher for subsamples
- Differences of one percent are due to rounding

Type of Event Attended



Live Events are special – but only half believe they provide an experience that can't be matched at home



71%

Attend live events for the experience and the memories that they create

77%

Travel outside their local area to attend live events

49%

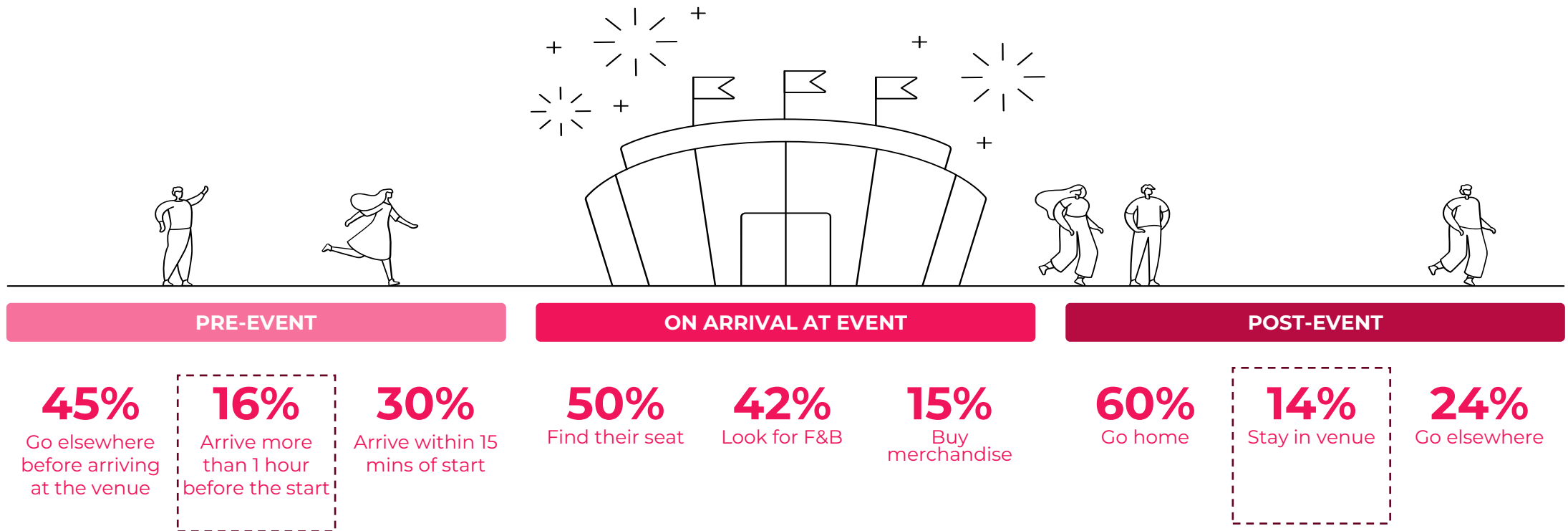
Feel live events provide an experience which can't be felt watching at home

59%

Describe themselves as “very satisfied” with the event experience

The majority of fans do not make the most of the full in-venue “at event” experience, with only 16% arriving more than an hour before the event

TYPICAL FAN JOURNEY



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KEY INSIGHT

The longer fans are in the venue pre and post the event, the happier they are. Three quarters of fans who arrive an hour or more before the event are very satisfied with their experience.



Opportunities for Improvement

1. Brilliant Basics – Bathroom wait times (24%) and F&B queues (19%) were the two major frustrations for event attendees

2. Tech Enabled – 60% of attendees now use digital tickets for events, whilst 56% would like to order their food and drinks through an app to improve convenience

3. Prolonged Experience – 38% of attendees stated they would be more likely to stay in the venue longer after the event if there were more options

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PRE-EVENT

02

02 PRE-EVENT

UK venue attendees begin their event experience when they research key aspects beforehand. Transport, food, drink and parking options are the most common areas fans look to investigate.

Accessing tickets through digital platforms and apps is the most common way attendees enter the venue.

Whilst most attendees arrive at venues 30 minutes before the event begins, those who arrive earlier are likely to be more satisfied with their experience. This also presents the opportunity for venues to further leverage commercial opportunities such as merchandise sales, sponsorship activations and food and drink.



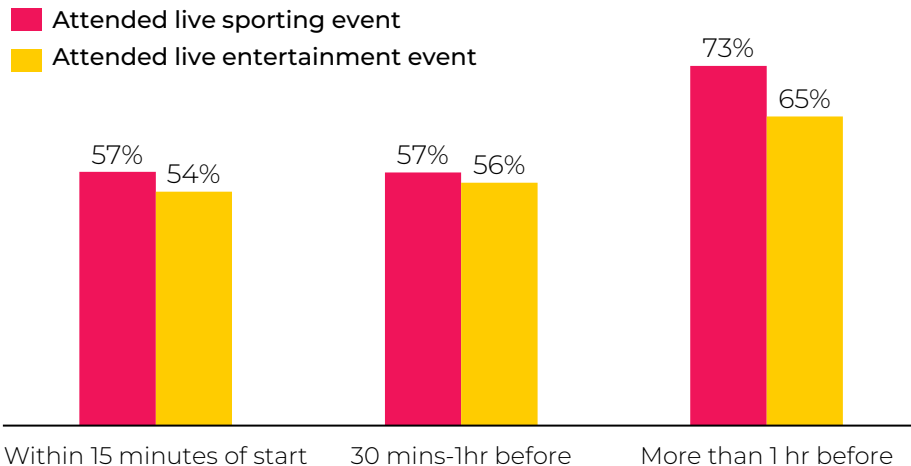
Building the anticipation at the venue directly before the event is important to driving satisfaction

EVENT SATISFACTION

THOSE THAT ARRIVE EARLIER TO THE EVENT ARE GENERALLY MORE SATISFIED WITH THEIR EVENT EXPERIENCE

Anticipation for the event and building the excitement in the lead up to the event, begins long before the start. Across both sporting and live entertainment venues, there is a positive correlation between event experience and arrival time. When fans feel like their experience is extended, we see that satisfaction is generally higher.

Event Satisfaction ('Very satisfied') – By time of arrival



Case Study - O2 Arena

Attendees of events at the O2 Arena were generally higher in overall event related satisfaction. Attendees at the O2 are significantly more likely to have arrived early and stayed for longer due to the array of F+B options, the ease of purchasing merchandise and event technology on display in the venue.

92%

Net Satisfaction ("Satisfied" or "Very satisfied") with event experience (vs. avg. Of **85%**)

45%

Arrived more than 1 hour before event (vs. avg. of **29%**)

58%

Looked for **F&B options** on arrival **Ranked #1** amongst all options (vs. avg. of **43%** - avg. ranks #2)

30%

Identified the **event technology** as driver of their enjoyable experience (vs. avg. of **20%**)

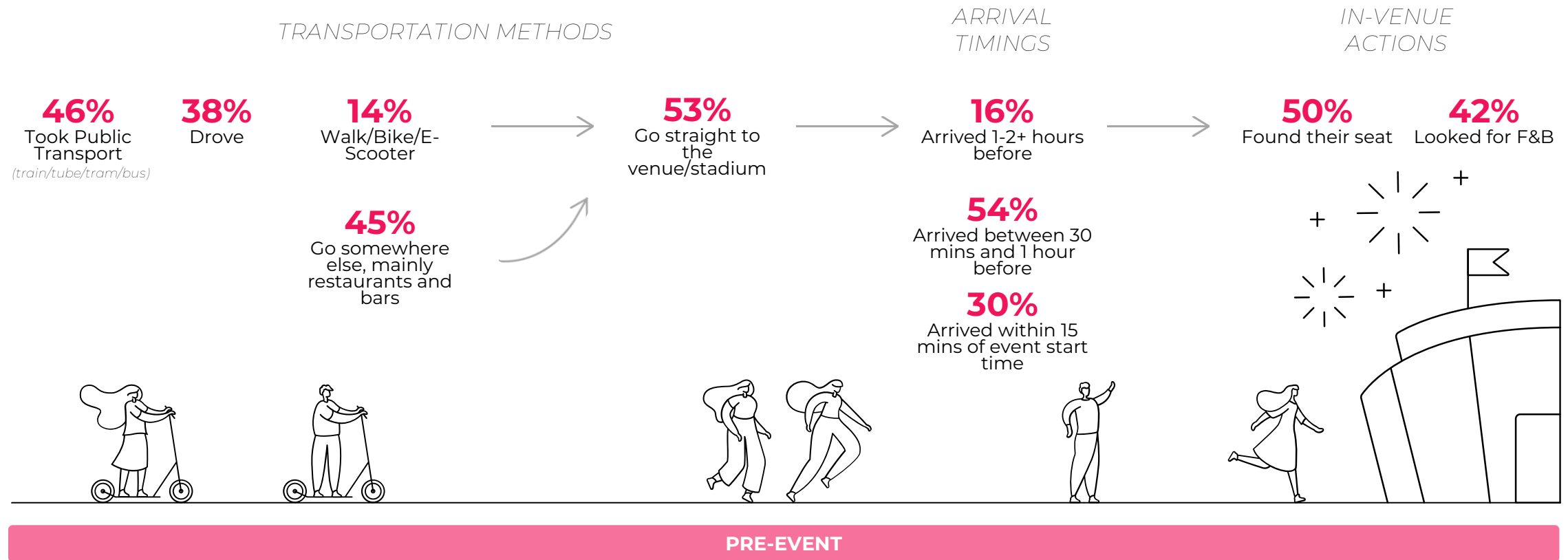
77%

Agreed that finding **merchandise** was easy (vs. avg. of **64%**)

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Most attendees arrive 30-60 minutes before the event, typically via public transport or car before finding their seats or scouting the F&B options


ATTENDEE JOURNEY TO THE VENUE




Most attendees travel outside their local area for events, with these fans more likely to frequent other venues before going to the stadium

WHAT ARE PEOPLE DOING BEFORE THE EVENT?

 **85%** Researched something before attending the event

 **77%** Travel outside of their local area to attend sports, music and entertainment events
Research significantly more beforehand

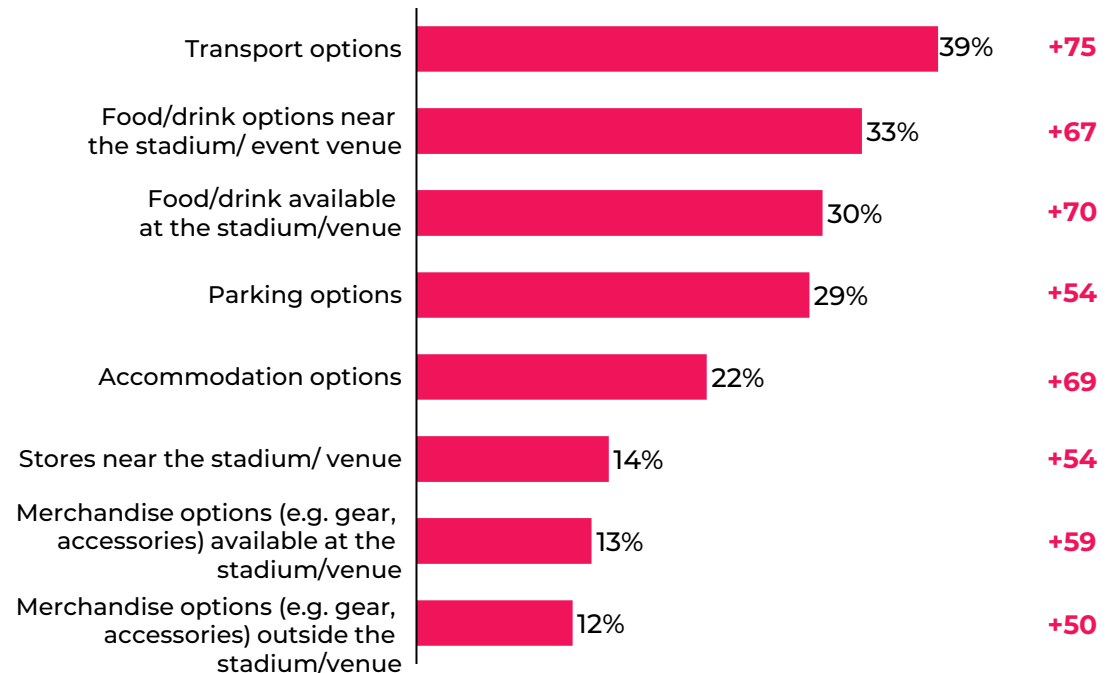
 **45%** Went somewhere else before going to the venue (mostly restaurants and pubs)
Higher for those travelling outside of local area

KEY TAKEAWAYS

- Those travelling outside of their local areas, are not only more likely to do more research, but they're also more likely to go somewhere else beforehand
- By leveraging technology (i.e. app), venues can ease the research journey for the masses, and in doing so potentially attract some of those event-goers to shift their pre-event excursion to the venue itself


Before attending the match/event, did you research or look into any of the following?

Net-ease (easy-difficult)




Whilst digital tickets are becoming the norm, a handful of older event-goers still prefer physical tickets


TICKETING PROCESS



60% Accessed their ticket digitally, compared to just 35% using a physical ticket



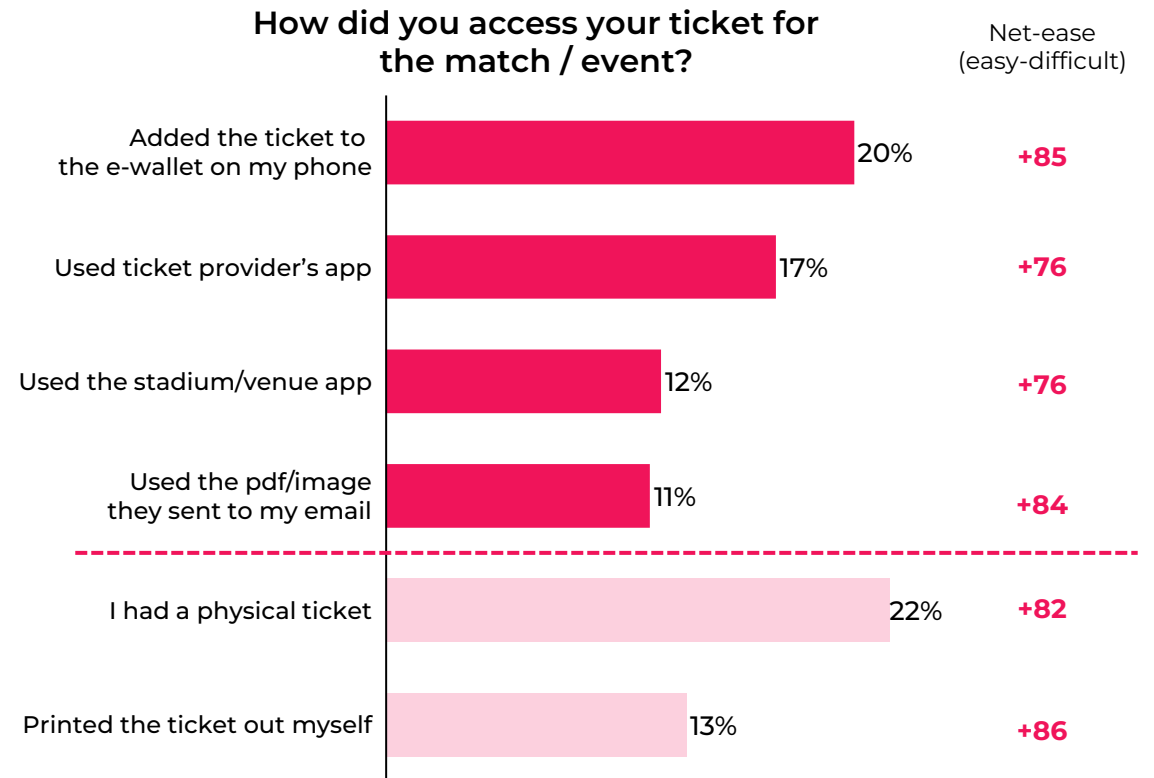
54% Of those using a physical ticket were over the age of 55



4x More likely Those that have difficulty accessing tickets are also more likely to be **dissatisfied with the event experience**

KEY TAKEAWAYS

- The largest source of difficulty in accessing tickets comes from **app experience**, either using via the ticket provider or a stadium/venue app. This sentiment was common across event-goers of all ages.
- Given the growing preference of digital ticket access, and the impact this can have on event enjoyment, venues should optimise the ticketing experience in-app to avoid frustration.



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DURING THE EVENT

03

03 DURING THE EVENT

Aside from heading straight to their seats, UK venue attendees are most likely to look for food and drink options when they first arrive.

However, queuing for food and drink emerges as a major frustration for attendees, with more than half agreeing they would be open to ordering food and drink via an app and would be willing to spend more for convenience.

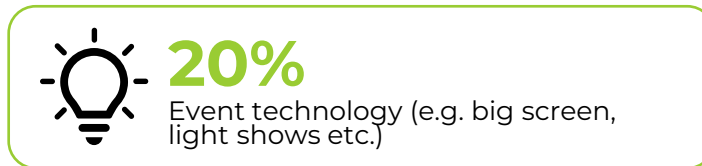
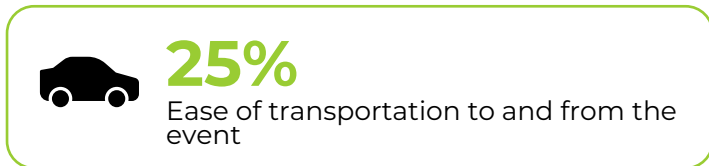
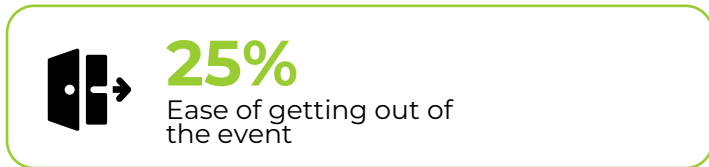
Partner activations and the ability to buy merchandise form a key part of venue experience during the event, although attendees find it difficult to recall the partners carrying out the activation as well as where to purchase products.



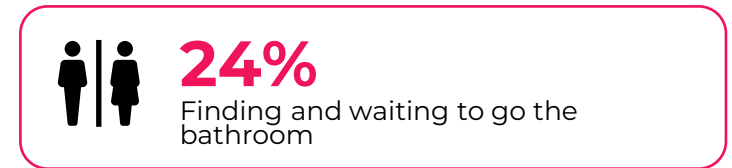
Attendee safety and venue ingress/egress are two critical event aspects, whilst waiting times for bathrooms is a major frustration for attendees

MOST ENJOYABLE AND FRUSTRATING EVENT ASPECTS

MOST ENJOYABLE EVENT ASPECTS



MOST FRUSTRATING EVENT ASPECTS



KEY TAKEAWAYS

- A clear frustration for event attendees are the long queues for bathrooms and F&B items. Venues could utilise technology (e.g. big screens) to direct queues / traffic to minimise time away from the action.
- Enjoyable event aspects centre around safety and ease, so venues need to prioritise these to maximise experience.

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The price of drinks is a major pain point for event attendees

FOOD & BEVERAGE



82%

More than 8 in 10 people consume either food or drinks during the event



34%

Consume drinks only



34%

Consume both food and drink



14%

Consume Food only



42%

Satisfied with value for money

44%

Satisfied with value for money

59%

Satisfied with value for money


KEY TAKEAWAY


- Value for money and competitive pricing for drinks are important for venues to be able to keep attendees at the event for longer, particularly as more than half of those attending will be buying a drink




Sponsorship activations can contribute to the overall positive experience, but they need to be memorable to drive engagement

OPPORTUNITIES FOR PARTNER ACTIVATIONS

 **29%** Identify the extra entertainment / festivities at an event as a reason for attending live rather than watching at home

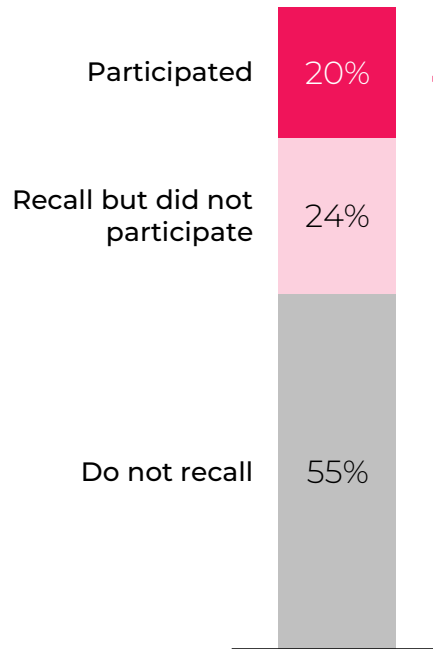
 **47%** Feel activations contribute positively to their overall venue experience

 **49%** Of those that took part in an activation would recommend their venue experience (vs. **40%** that did not take part)

KEY TAKEAWAYS

- Venues should work with sponsors and partners to create engaging activations which can result in better fan engagement and fans staying longer
- Activations also need to be memorable as they play a strong role in venue recommendation, however more than half of fans are unable to recall one at their attended venue

Do you recall or participate in any sponsorship activations (e.g. fan zones, giveaways, competitions)?



SIGNIFICANTLY HIGHER

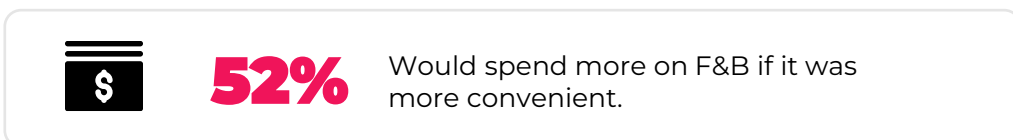
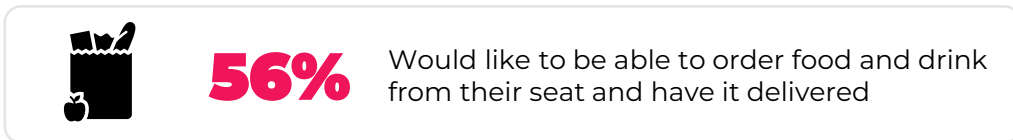
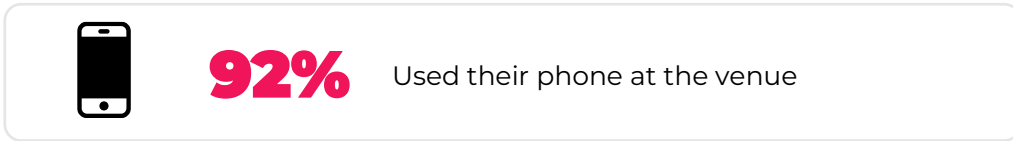
Amongst people under the age of 34 to both recall activations and participate in them

4.5x

Those who participated in activations are significantly more likely to stay at the venue after the match/event finished

Phones and technology can play a key role in improving fan experiences by saving time and keeping them close to the action

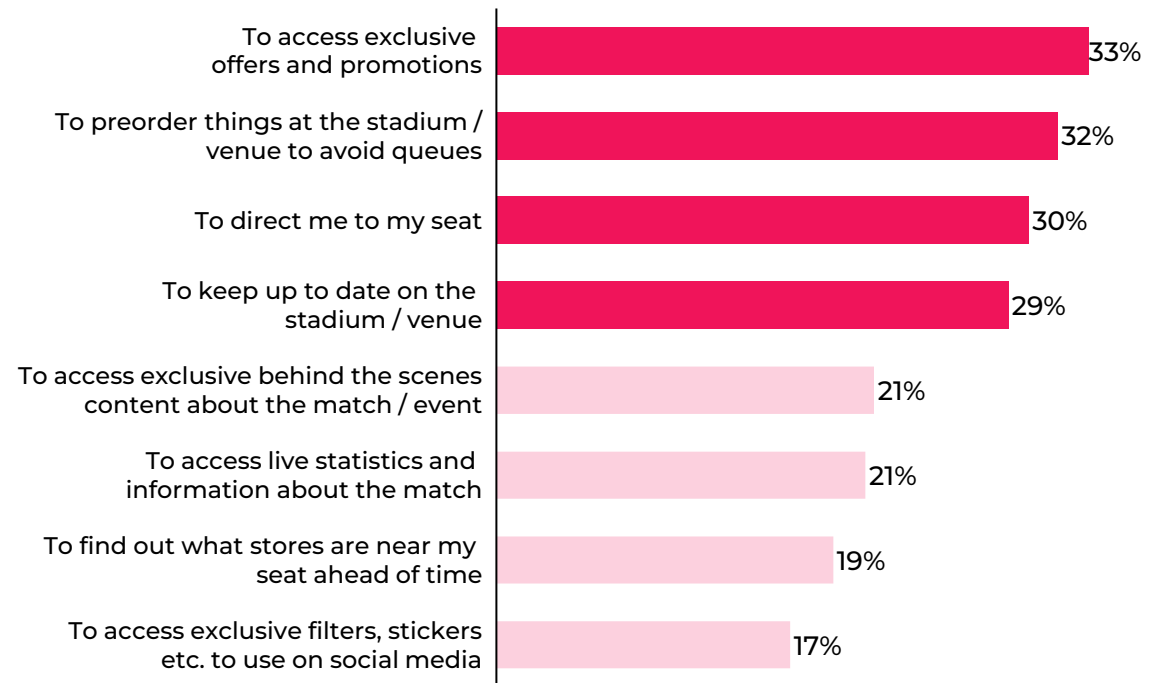
IMPROVING EXPERIENCES THROUGH TECHNOLOGY



KEY TAKEAWAYS

- Fans will expect investment into technology that allows them to speed up their F&B experience
- Venues that take the lead in this area will keep pace with global trends and could benefit from increased revenue
- Offers and promotions can be leveraged to drive app downloads, with the app experience enabling a better venue experience overall

Would you download an app for any of the following reasons?



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POST-EVENT 04

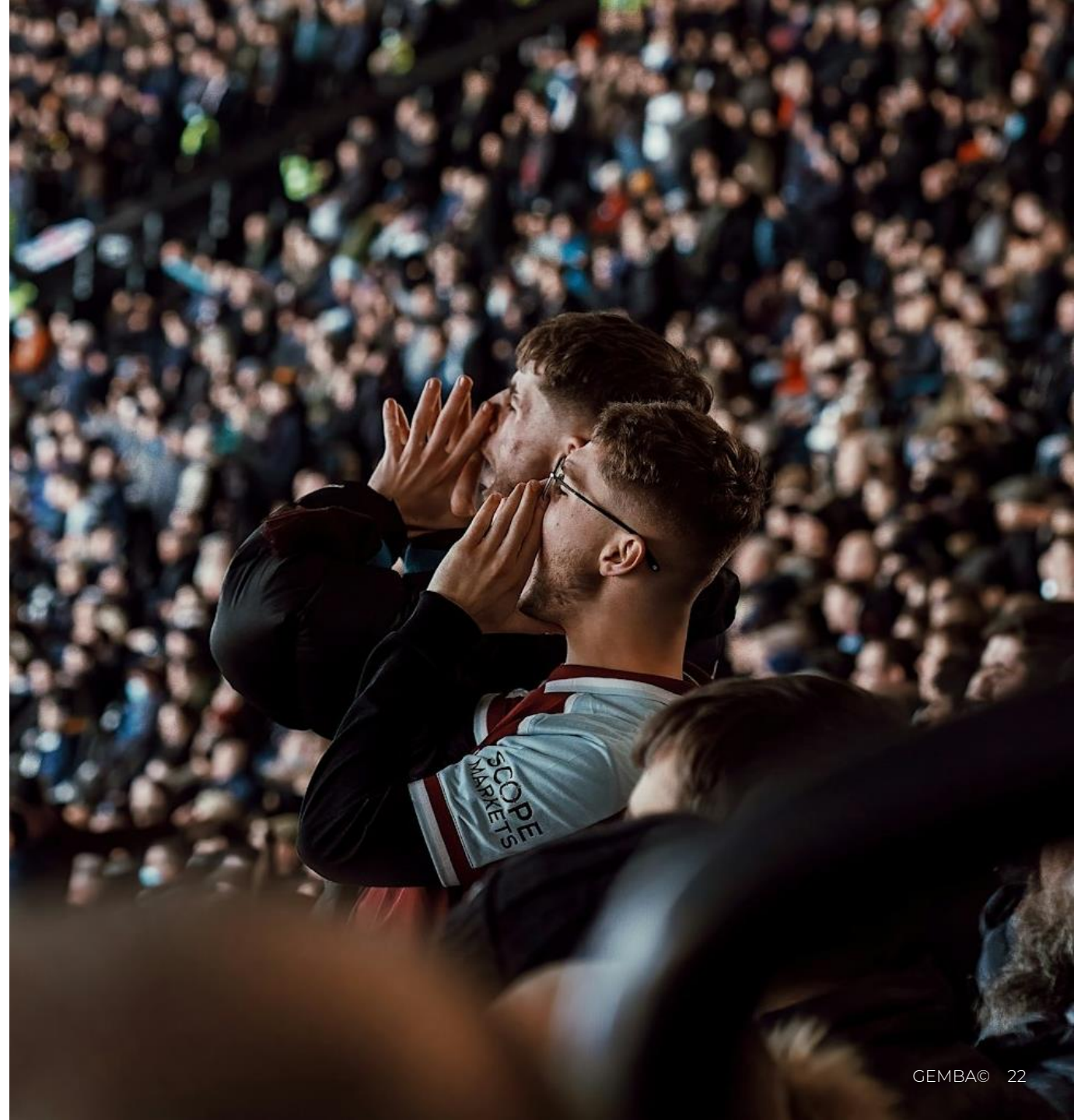


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04 POST-EVENT

After the event, UK venue attendees looking to continue their experience are more likely to head away from the venue, with nearly half heading to a bar or restaurant elsewhere.

Increased number of post-event activities / options can help to boost revenue and attendee experience, by alleviating pressure on large exit crowds and busy transportation services away from the event.



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Further in-stadia options could help drive revenue and ease frustration

THE JOURNEY AFTER THE EVENT

PROPENSITY TO STAY POST-EVENT



51%

Would happily hang around at the venue if there were post-event options (bars, music etc.)



34%

Feel easier experiences with transport and venue entry / exit would make them more likely to return in the future

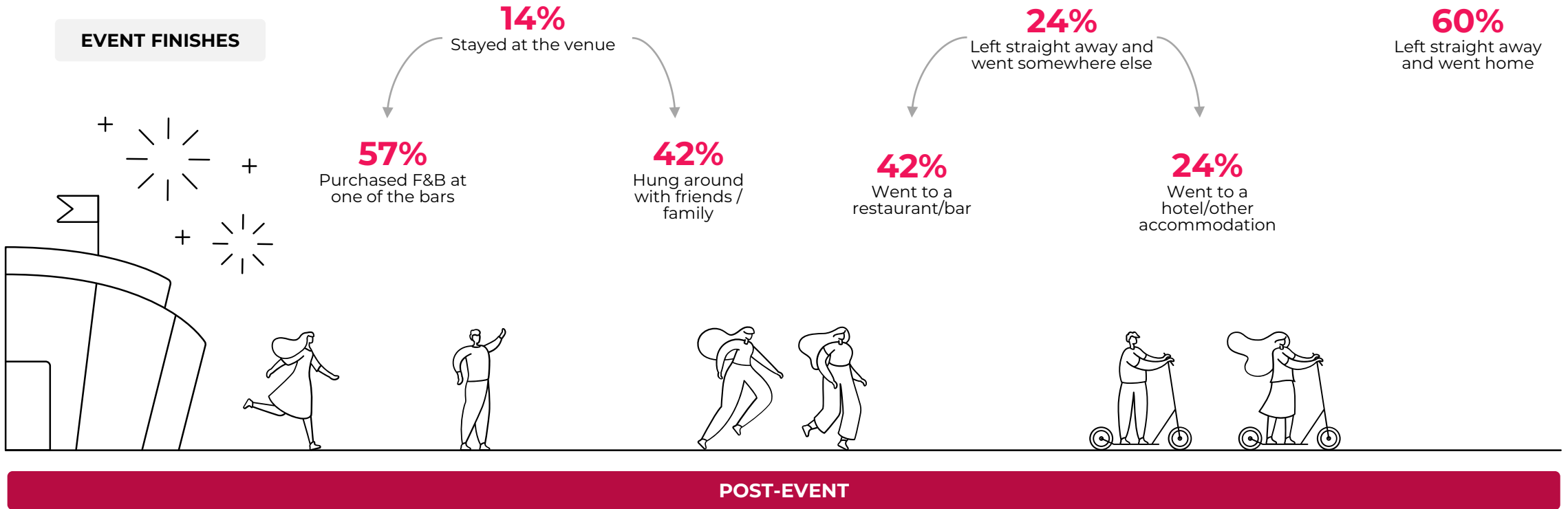
KEY TAKEAWAYS

- Fans are looking for opportunities post-event to socialise and continue their event experience
- Queues and delays are a big source of frustration, so venues offering services that can extend the event experience will help to reduce with pressure on immediate event exit, and thus ease the load on transportation away from the venue



Nearly 85% of attendees currently leave the venue straight after the event finishes

ATTENDEE JOURNEY LEAVING THE VENUE AFTER THE EVENT



There is ample opportunity for venues to prolong the event experience by offering a wider variety of food, beverage and entertainment options

OPPORTUNITY TO PROLONG THE EVENT EXPERIENCE

If the venue offered post-event options, how likely would you be to stay?

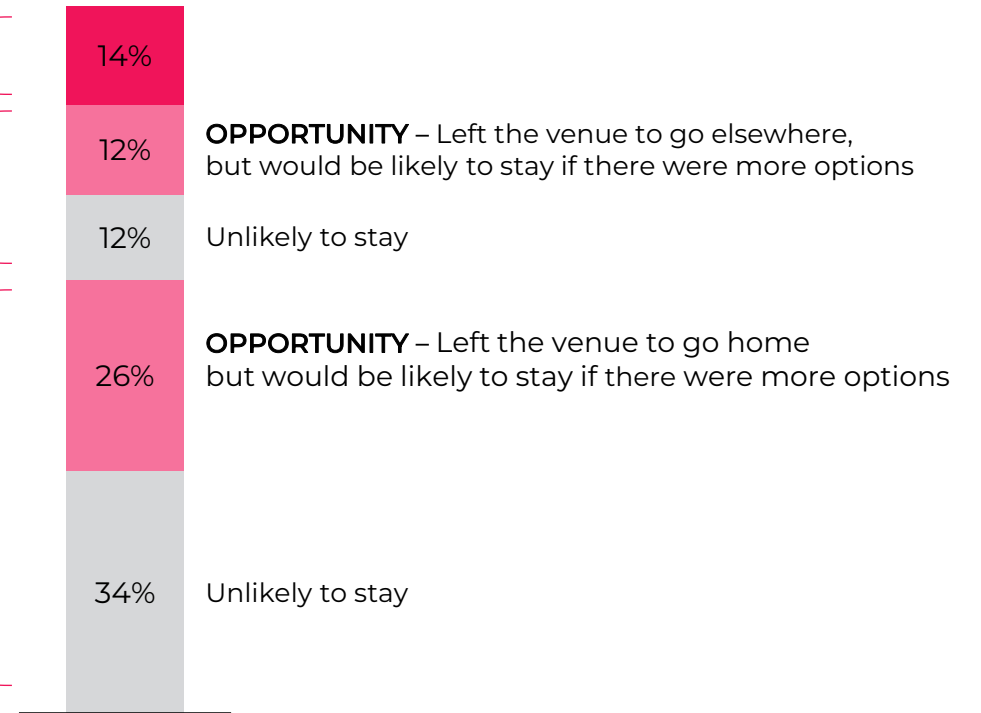
14% Stayed at the stadium / venue

24% Left the venue and went elsewhere

60% Left the venue and went straight home

KEY TAKEAWAY

- The average venue has the opportunity to increase their post-event revenue significantly, by either increasing the number of F&B / entertainment options, or effectively communicating that to their attending audience



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CONCLUSIONS

05

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The need for a seamless fan experience is now

CONCLUSION

The UK has a deep-rooted love for live events, with enthusiastic crowds filling venues year after year, celebrating everything with unwavering passion. From Glastonbury to Wimbledon, The Crucible to the packed stadiums week-in, week-out across the Premier League and the record-breaking attendances in the Women's Super League, we love it.

Fan expectations have soared, seeking fully immersive experiences and embracing new technologies to avoid lengthy queues and maximize enjoyment. Venues must now meet these heightened demands by creating seamless and memorable experiences. However, the journey extends beyond the event itself. Engaging fans before and after events can enhance the overall experience, open new revenue streams, and foster repeat visits.

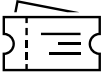






As crowd records continue to be broken, UK venues must innovate and invest in fan engagement strategies to stay ahead. The future of live events is here, and the journey to redefining the fan experience begins now.

Venues that adapt will thrive; those that don't risk being left behind.



There are clear opportunities for venues to improve the fan experience

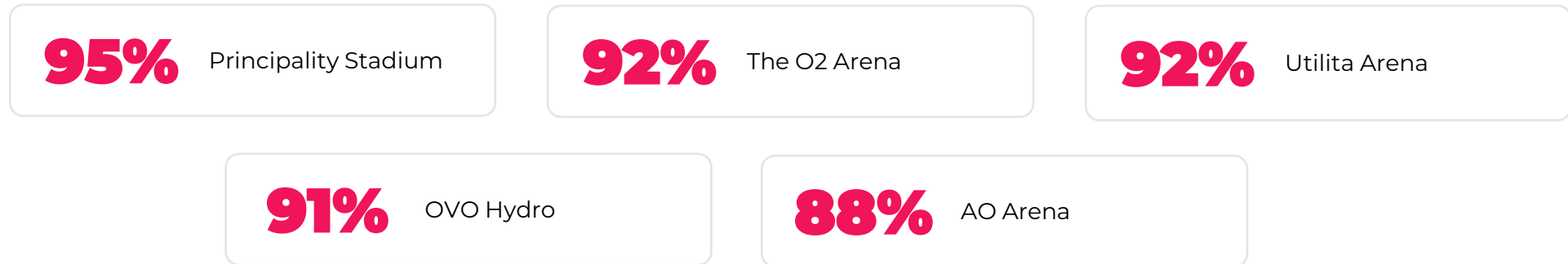
OPPORTUNITIES

PRE-EVENT	DURING	POST-EVENT
 Ease the ticketing process for consumers by enhancing ticket app user experience	 Leverage technology for wayfinding and keeping fans closer to the action for longer	 Provide in-stadium post- event options for fans to stay longer
 Make information accessible and easy, to give people the best chance of arriving early at the venue	 Partner activations can play a role in enhancing the fan experience if they're memorable	 Communicate the in-stadium, or nearby options effectively with the audience
 Provide clear and detailed information on transportation links	 Offering value for money particularly on beverages is important for event attendees	 Create more efficient exit routes and access to transport away from the venue

UK sport specific stadiums can learn from multi-event venues which tended to perform the strongest in our stadium scorecard analysis

UK VENUE PERFORMANCE | SUMMARY

TOP 5 MAJOR UK VENUES RANKED ON FAN NET SATISFACTION (SATISFIED + VERY SATISFIED)



KEY TAKEAWAYS

- Single sport venues need to work harder to continue to offer exciting experiences to regular attendees who tend to be more wowed by the one-off big event stadiums and venues
- On average, the sense of safety and security, ease of getting in and out of the event and ease of transportation emerge as the top three enjoyable aspects for the best UK venue attendees

**These are venues with the highest most recent attendance having a base size of n=40 or above, venues which are below this base size have been excluded in the analysis of this section.*

Gemba takes a holistic, data agnostic approach to creating and delivering insights and strategies to Global venues and stadiums

RELEVANT EXPERIENCE

DATA & ANALYTICS

- Stadium data strategy
- Predictive attendance modelling
- Stadium budgeting & benchmarking
- Live ticket sales and attendance
- Live food and beverage reporting
- Single customer view and next best action modelling
- Digital reporting

STRATEGIC ADVISORY

- Stadium organisational strategy
- Stadium benchmarking
- Business case and feasibility studies
- Financial and economic impact modelling
- Customer lifetime value analysis

COMMERICAL ADVISORY

- Stadium commercial strategy
- Naming rights valuation
- Growth strategy
- Price choice modelling - ticketing and hospitality
- Pourage rights strategy

RESEARCH & INSIGHTS

- Member and visitor customer satisfaction research
- Corporate hospitality research
- Global stadium benchmarking research
- Customer segmentation
- Proprietary market research (Sports & Entertainment, Category Insights & Asset Power Study)

There are a range of benefits & value that Gemba can deliver to Venues and Stadiums



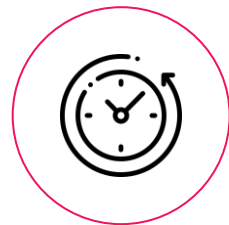
INCREASED REVENUE

Ability to understand live performance across ticket sales, food & beverage and merchandise has allowed commercial decisions in real time to drive revenue



REDUCED COSTS

More accurate attendance prediction, budgeting and cost benchmarking, resulting in significant cost savings



MAXIMISED TIME & EFFORT

Automation of manual processes using data engineering, dashboards & reporting, resulting in significant time saving



UPLIFTED CAPABILITY

Data democratisation, resulting in staff making more data driven decisions and improving data literacy

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