

**Gemba**<sup>®</sup>

JULY 2024

# EVOLVING THE EVENT EXPERIENCE

A research report diving into the fan experience before,  
during and after sport & entertainment events

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# FANS ARE BACK!

The last 12 months has been a bumper period for sport and entertainment across Australia. Fans were back in force with attendances soaring to record levels, flocking to live events and reigniting their love for out-of-home experiences.

Australia hosted major International events such as the FIFA Women's World Cup, Taylor Swift, Australian Open and the Australian Formula 1 Grand Prix.

At Gemba, we're passionate about fan experience and work with Australia'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 that fan expectations have evolved significantly over time and stadiums, venues and rightsholders must step up their game to meet these needs.



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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

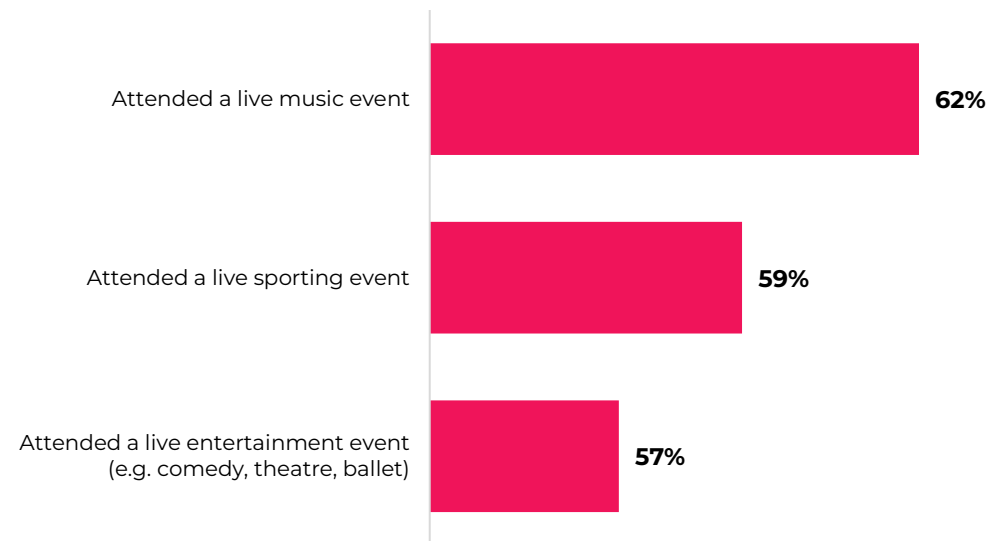
### METHODOLOGY

- A nationally representative 15-minute online survey was conducted among n=1,912 Australian residents aged 16 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 Australian gender, age and location

### NOTES

- The survey was conducted from 12 February - 25 February 2024
- The maximum margin of error on a sample of n=1,912 is +/- 2.2% at the 95% confidence interval for results near 50%. Margins of error are higher for subsamples
- Differences of one percent are due to rounding

### Event attendance | Past 12 months



# Venues must evolve to enhance the fan experience at all points of the journey

## 8 KEY INSIGHTS

### 01 50% VERY SATISFIED

Only half of fans are very satisfied with their venue experience.

Fans are frustrated by time away from their seat waiting for bathrooms and F&B, quality of F&B and finding their way around the stadium.

### 02 PARKING & PUBLIC TRANSPORT

Parking and public transport options are the most searched before an event.

Finding information on parking at and around the venue is a pain point as well as the most efficient public transport route.

### 03 FOOD & BEVERAGE INFORMATION

Fans want to know what food options are available.

Fans currently find it difficult to find what food is available at the venue, where its located and what the prices are.

### 04 ACCOMMODATION NEAR THE VENUE

One in five (22%) are researching accommodation options.

There is a lack of information on what accommodation is available at or near the venue.

### 05 WAYFINDING AROUND THE VENUE

Finding seats, food & beverage options and bathrooms are common pain points for fans.

Fans believe they are wasting too much time waiting and missing the action.

### 06 SAFETY AND SECURITY

Feeling safe and secure is important for fans to have an enjoyable event experience.

Negative publicity and experiences influence fans perceptions of safety and security.

### 07 TIME AWAY FROM SEAT

Two-thirds (66%) of fans want to be able to order food from their seat.

Fans are frustrated when they miss the action to purchase F&B or go to the bathroom.

### 08 FAN EXPERIENCE EXTENSION

Three in five (58%) fans would stay longer after an event if bars and food locations remained open.

Most fans want to stay longer but stadiums don't provide for this.

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On average fans rated their venue experience **4 out of 5** with only **50%** saying they are very satisfied.

This presents opportunities for venues to innovate and meet customer needs.

OVERARCHING FINDINGS

50%

Are very satisfied with their experiences (87% satisfied)

86%

Go to live events for the atmosphere and to experience something they can't at home

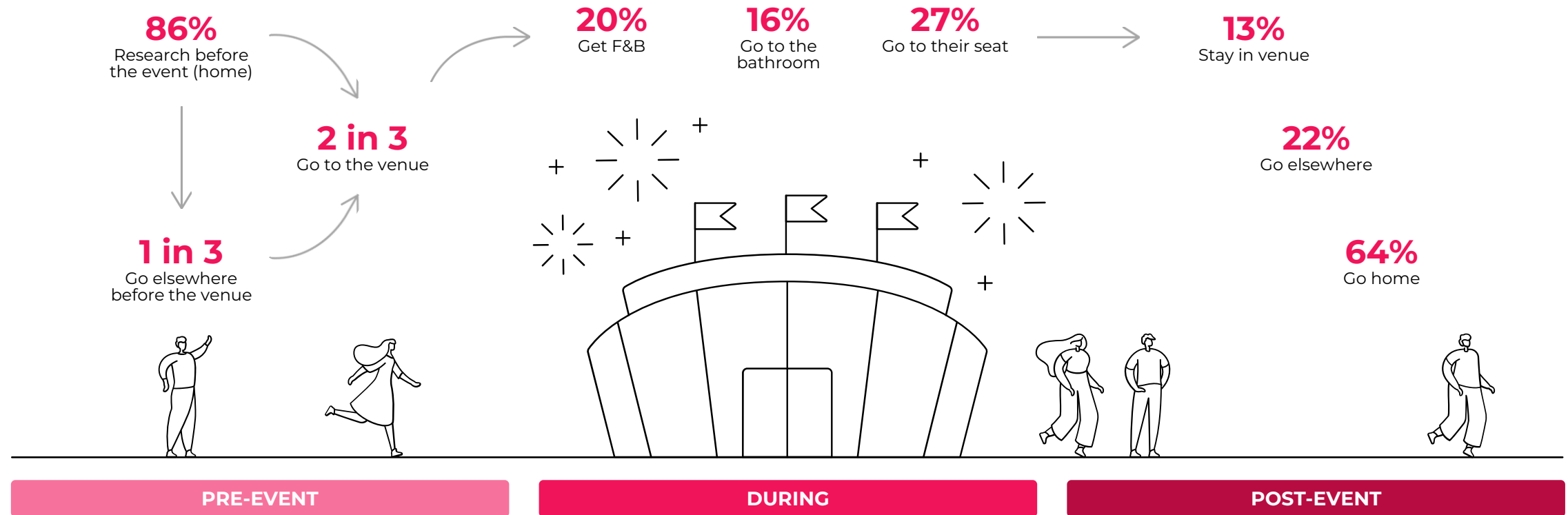
48%

Are very likely to recommend reattending (85% likely)



# The typical customer journey starts well before the event and extends beyond the event

## THE TYPICAL CUSTOMER EVENT JOURNEY





# There are opportunities for venues to improve the fan experience

## OPPORTUNITIES

### PRE-EVENT



Provide clear information on parking and public transport

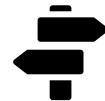


Establish commercial partnership with nearby accommodation



Communicate what F&B is available and prices to entice fans earlier

### DURING



Leverage technology for wayfinding to find seat, F&B, bathroom etc.



Introduce in seat ordering or click and collect to reduce wait times



Provide more toilets to reduce wait times

### POST-EVENT



Provide post event options for fans to stay longer



Provide information on nearby venues or partners



Create more efficient exit routes and access to transport

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**PRE-EVENT**

**02**

## 02 PRE-EVENT

Fans like to be prepared. Most will research ahead of time, looking for transport, parking and food in the area. Some will go elsewhere before the event, and most will arrive at least 30 minutes before the event starts.


Digital tickets are now commonplace with most comfortable accessing their ticket in this way.


Few are using venue-specific apps to access their information but almost half are interested in doing so, providing a key opportunity to centralise and integrate experiences before the event even starts.




# The opportunity for venues to engage fans begins well before the event

## WHAT ARE PEOPLE DOING BEFORE THE EVENT?

 **86%** Searched something before attending the event.

 **36%** Went somewhere before the event – food or drink were the most common activities.

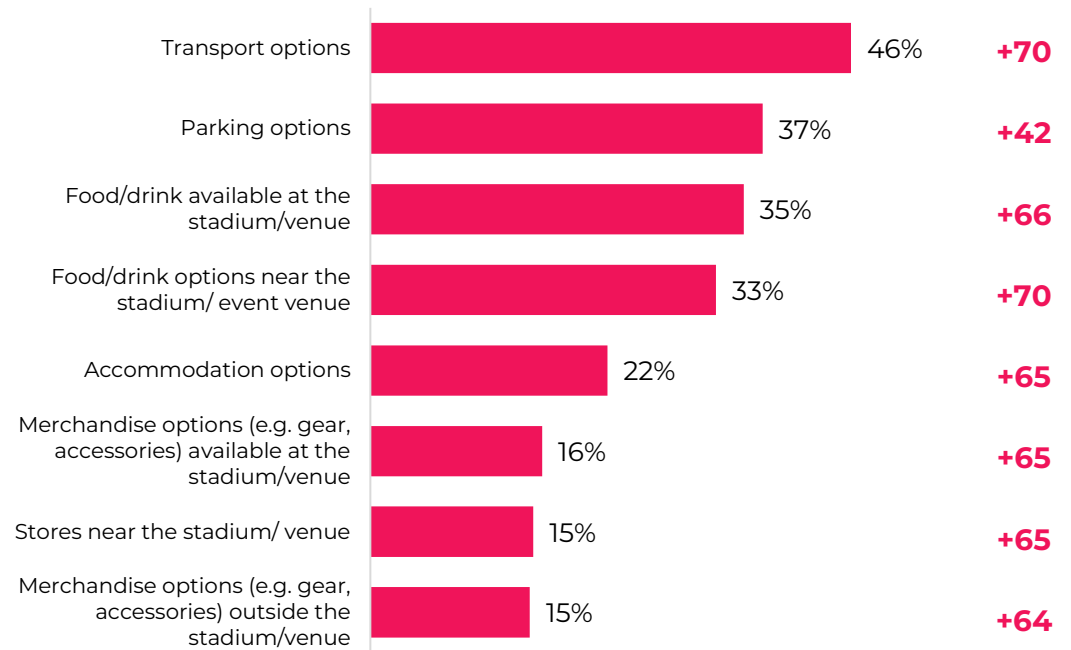
 **69%** Arrived at least 30 minutes before the event started.

### KEY TAKEAWAY

- The event journey begins well before the event
- Venues can engage fans in the weeks prior and begin to influence their event experience
- Fans are looking for additional activities and venues can encourage them to spend money at the venue


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


Net ease  
(easy-difficult)




# Digital tickets are becoming the norm, but technology can be leveraged further to enhance the overall fan experience

## TICKETING & APPS

 **65%** Accessed their ticket digitally – with most (76%) finding the process very easy.

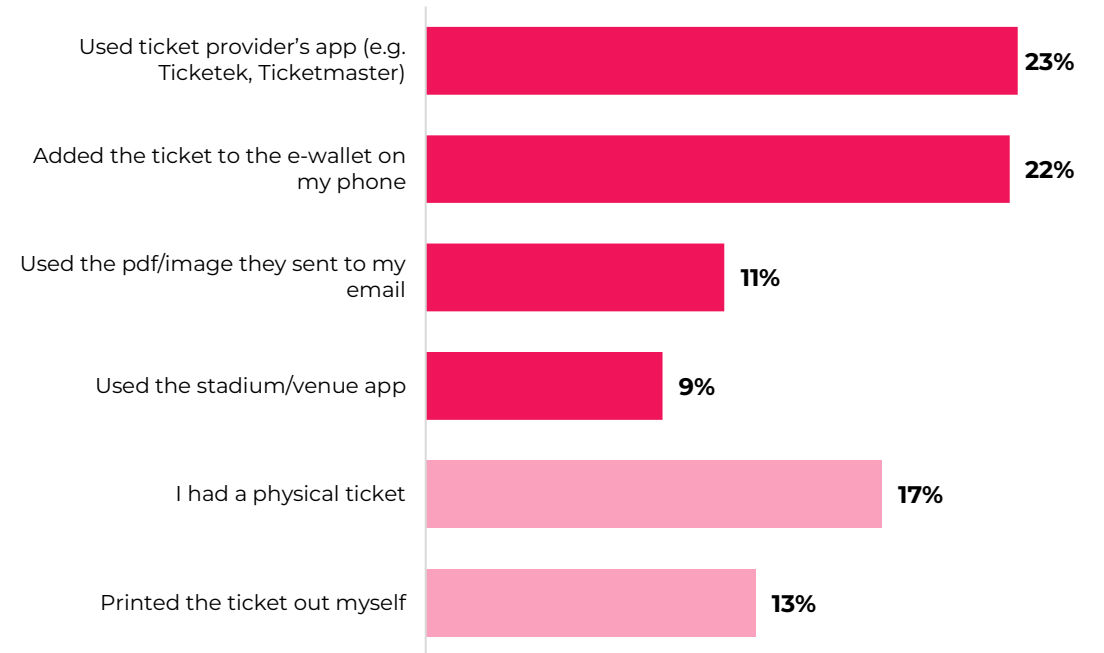
 **18%** Have used a venue-specific app.

 **43%** Were unaware of any venue app but would be interested in using.

### KEY TAKEAWAY

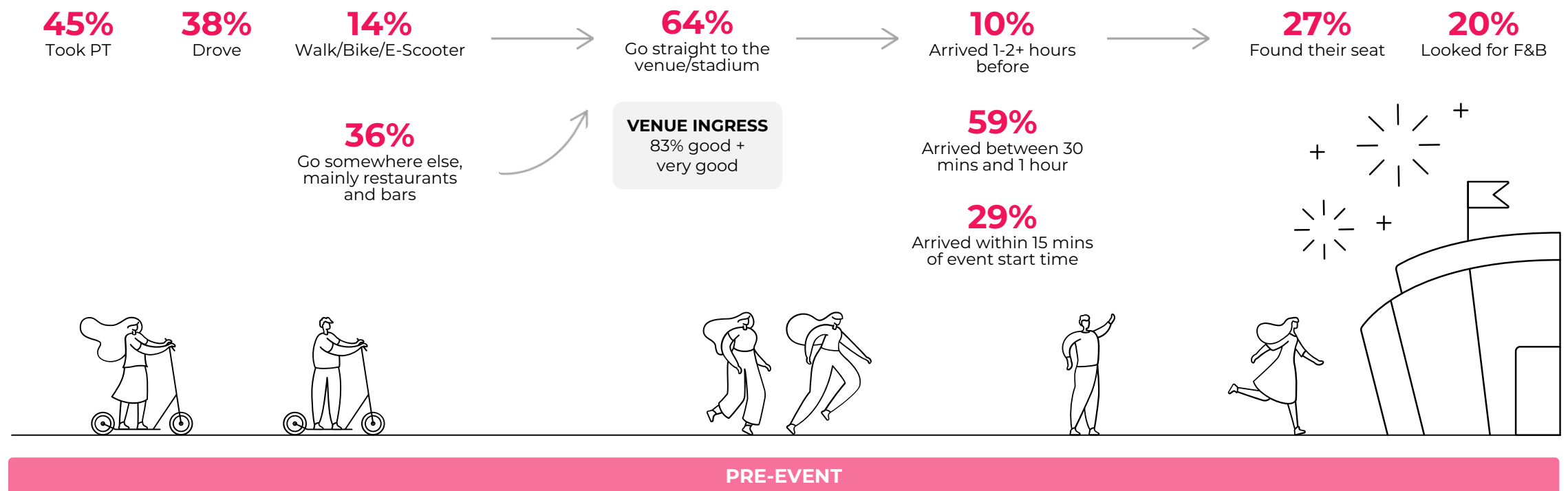
- Fans have become comfortable using their phones to access tickets
- Leveraging technology to democratise access to venue information can improve fan experiences and connect fans to venues throughout the entire journey

### How did you access your ticket for the match/event?



# Attendees typically arrive at least 30 minutes before the event, coming from home and going straight to find their seat and F&B

## ATTENDEE JOURNEY



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# DURING THE EVENT

03

## 03 DURING THE EVENT

Finding their seat and food and beverage options are key once people arrive at the venue. Almost all are using their phones at some point but only 2 in 5 rate mobile network quality as very good – venues can play a role here.

Food and beverage is a key part of the experience, but the offering is not living up to fan expectations.

Fans are open to new technologies that keep them in their seat and improve experiences.





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## Phones are a key part of the fan experience

### HOW ATTENDEES ARE USING THEM



**27%**

Looked for their seat once at the venue, 20% looked for food and drink – venues can play a role in aiding both activities.



**91%**

Used their phone at the event – Taking photos (55%), messaging (34%), paying for food and drink (31%) and posting to social media (26%) were the key activities. Just 10% used the venue wi-fi.



**40%**

Rate the mobile network quality as very good despite not using the wi-fi.

#### KEY TAKEAWAY

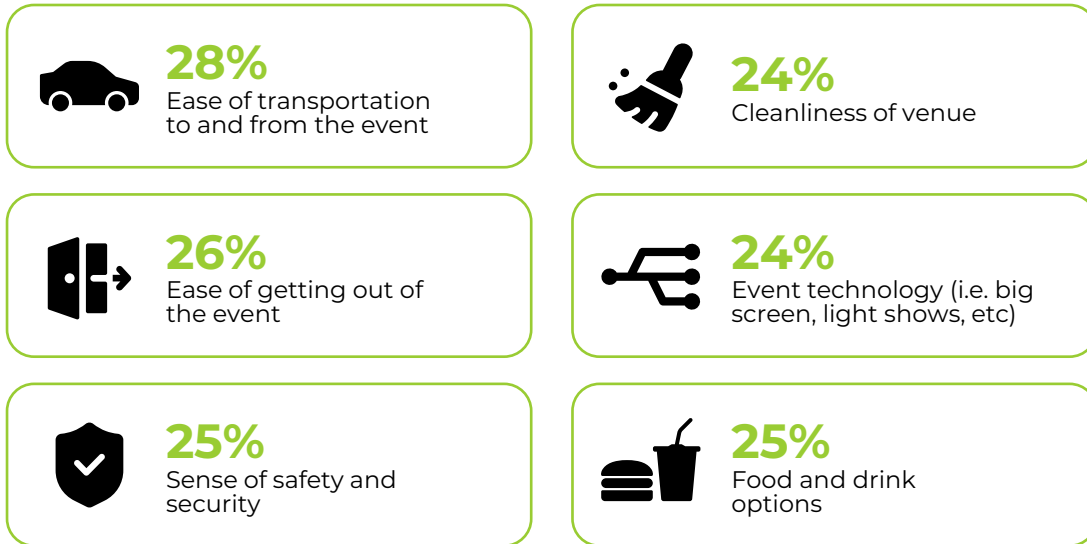
- Technology that allows fans to find their seat and F&B quicker will improve experiences
- There is a key role for phones which are already ingrained in the experience
- Transitioning fans to venue wi-fi can ease network traffic and improve connectivity



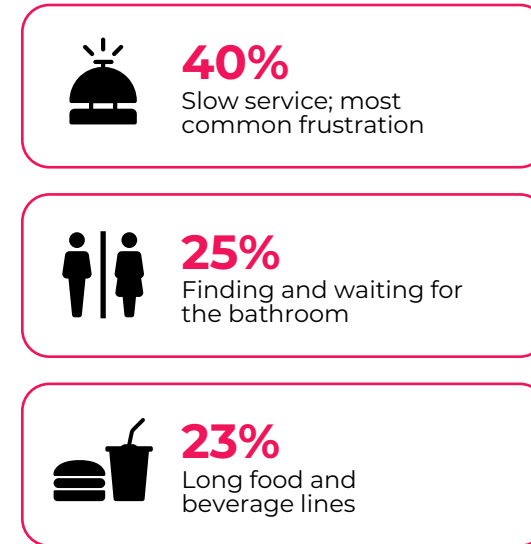
# Starting and leaving on a good note, and finding ways to minimise the time away from seats will improve fan experiences

## MOST ENJOYABLE AND FRUSTRATING EVENT ASPECTS

### MOST ENJOYABLE EVENT ASPECTS



### MOST FRUSTRATING EVENT ASPECTS



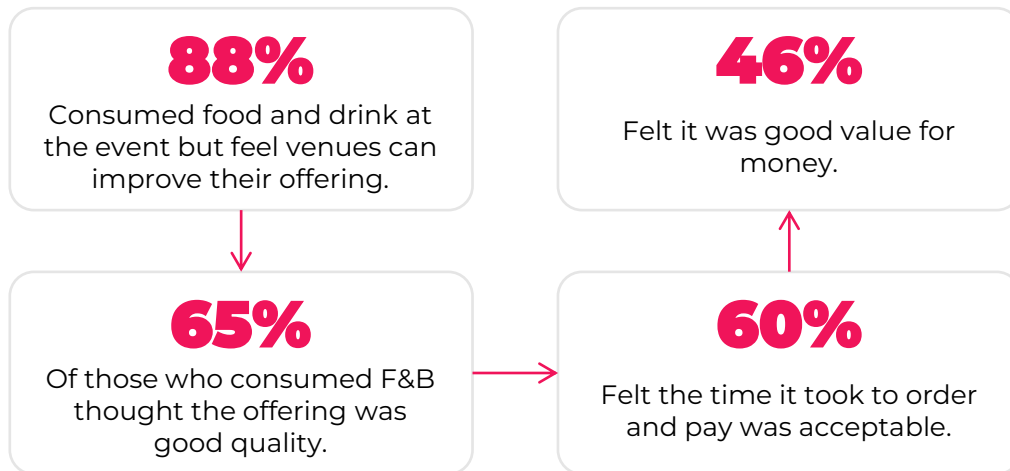
### KEY TAKEAWAY

- Technology can and must play a role in addressing the most frustrating event aspects
- Fans are attending for the atmosphere, memories and for an out of home experience. It is up to venues to make their experiences as seamless and enjoyable as possible

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# Food and beverage is key but may not be meeting expectations

### FOOD & BEVERAGE



### KEY TAKEAWAY

- Food and beverage are a key part of the fan experience but the process to find and order is a pain point that when addressed, can elevate the fan experience significantly
- As stadiums overseas lift their F&B offerings, fans domestically will hold higher expectations on both service and offering



# 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



**66%** Would like to be able to order food and drink from my seat and have it delivered.



**62%** Would use QR codes to order food at stadiums/venues.

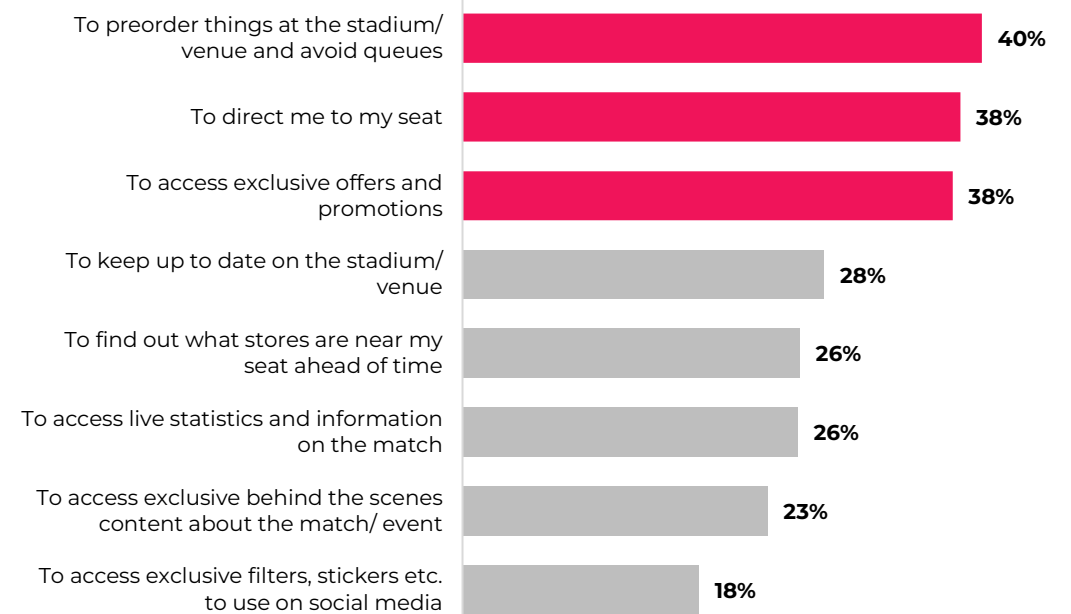


**59%** Say they would spend more on F&B if it was more convenient.

### KEY TAKEAWAY

- 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

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



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# POST-EVENT 04

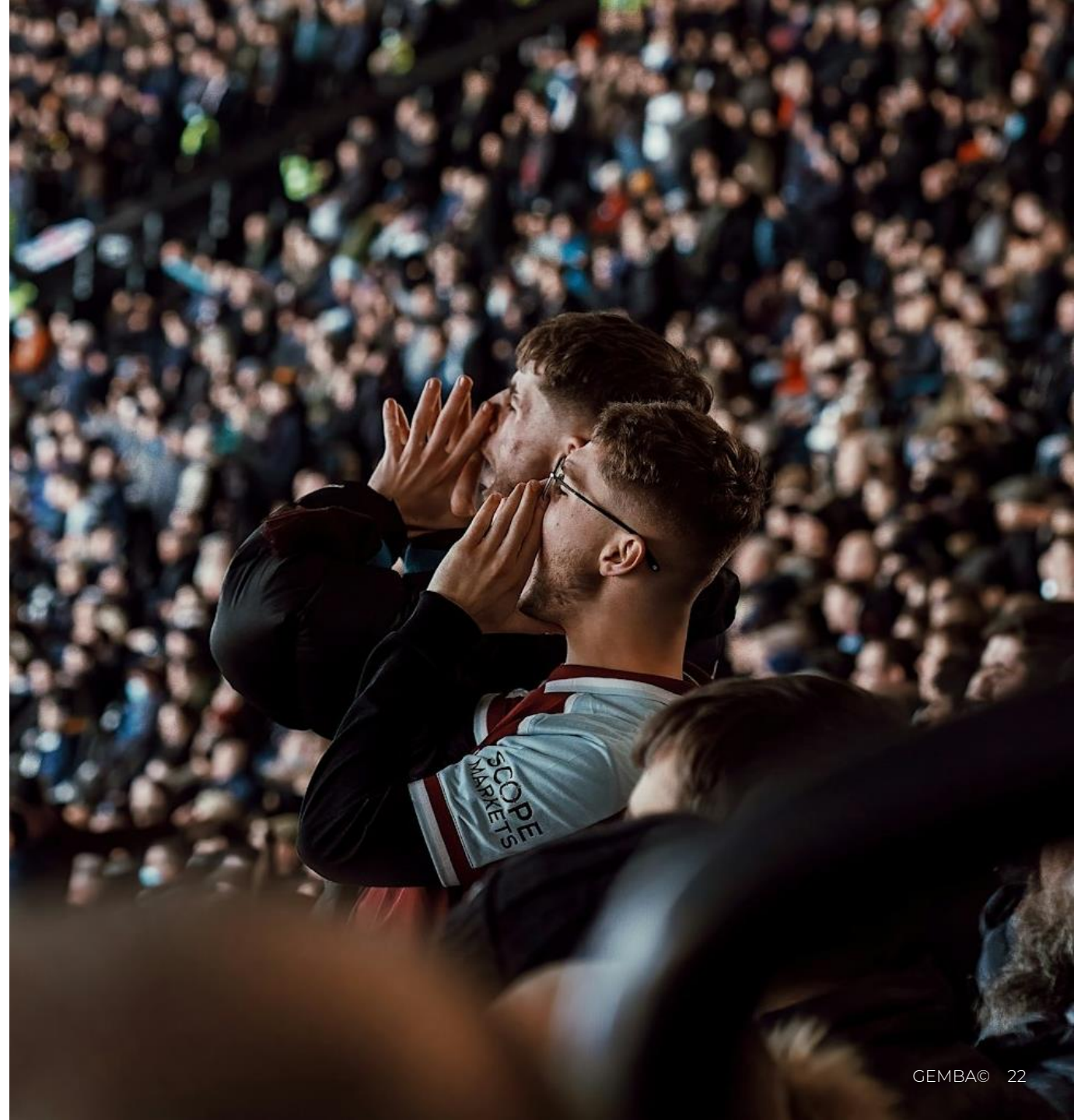


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## **04 POST-EVENT**

Once the event finishes, many look to continue their evening. Those that stay at the venue consume more food and beverage and socialise with friends. Those who go elsewhere head to restaurants and bars.

Most express an interest in hanging around if there were post-event options pointing to a key revenue opportunity for venues that extend the service offer.



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# There opportunities to drive further revenue post-event

## THE JOURNEY AFTER THE EVENT

### PROPNENSITY TO STAY POST-EVENT



**58%**

The majority of event goers (58%) would happily hang around at the venue if there were post-event options (bars, music etc.)



**21%**

One in five (21%) say more pre and post-event options at venues would make them more likely to revisit, in conjunction with better transport (24%) and easier entrance / exit (24%).

### KEY TAKEAWAY

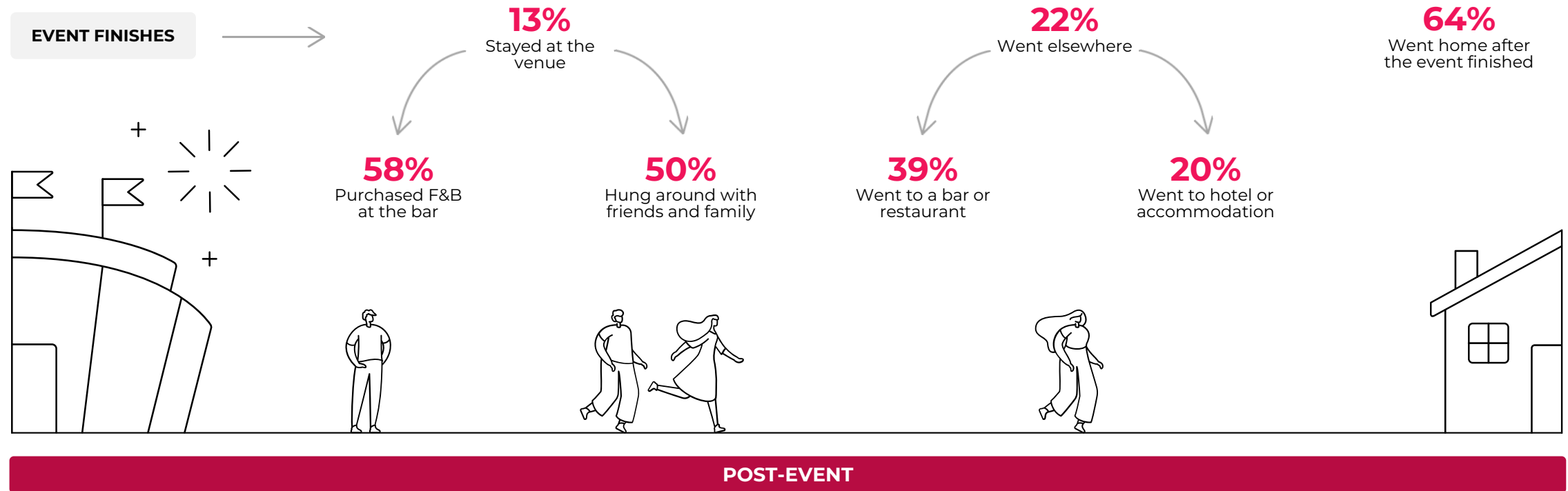
- Fans are looking for opportunities post-event to socialise and consume food and beverage
- Extending the venue service offer into post-event hospitality and experience can help unlock greater value from attendees and address egress safety and bottlenecks



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## 1 in 3 people stayed at the venue or went elsewhere post-event providing further revenue generating opportunities for venues

### THE JOURNEY AFTER THE EVENT





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## The need for a seamless fan experience is now

### CONCLUSION

Fans have reignited their love for live events. But with this return has come increased expectations. The desire for an integrated and seamless live event experience is now and venues must invest to make this happen.

Fans want to enjoy as much of the action as possible and are willing to do their part by adopting new technologies. Anything that can make their experiences more memorable (and not have them stuck in a food or bathroom line) is worthy of investment.

But venues must also recognise that there are opportunities beyond the event itself. The journey starts well before the event and concludes well after. Venues can capitalise by creating mechanisms to engage fans pre and post event. Doing so will integrate the fan experience, open additional revenue streams and keep people coming back for more.

We are at the start of journey that will see crowd record numbers continue to be broken. Venues must keep up or risk being left behind.

**It begins now.**



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