



Connected Sports Fans 2016

Trends On The Evolution Of Sports Fans Digital Experience With Live Events

Research conducted by Spider Marketing for Avaya, June 2016



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2016 Connected Sports Fans Report

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01 Introduction

Trends On The Evolution Of Sports Fans Digital Experience With Live Events

It is now estimated that smartphone ownership in the United States has reached 72% of the population. In the UK, it is estimated to be around 68%, while Australia comes out highest at 77%.⁽¹⁾ And a recent report from Deloitte says that the younger a consumer is, the more likely they are to use their phones as they go about their day.⁽²⁾

This evolution has significant ramifications for all industries, not least for large venue owners. They face significant competition from all of the other ways in which today's consumers can engage with live experiences - and it is vital for them to respond to these challenges in order to keep the stadium experience fun, relevant and exciting.

It is with this background in mind that Avaya decided to conduct extensive research into the new fan of today - what do they want from their digital stadium experience and how will the rise of digital alter the way in which sports will engage in the future? The research, conducted in April 2016, focuses on 5,000 respondents who have attended a live event at a large stadium in the last year and who report owning a smartphone. Three countries are covered in this research: Australia, the United Kingdom and the United States.

This research provides unique insight into how often this group use their mobile devices on a live event day - before the event takes place, during

the event and after the event. It looks at what motivates these consumers, what they are trying to achieve and who they engage with. It uncovers the connections and shifting relations between the fans, the stadium, the team they support and the broader audience.

The report will enable venue owners to understand the new digital fans of today, the services they require and how they will need to adapt to accommodate rapidly changing requirements. In particular, the report places a big focus on how different generations are changing their attitudes towards the role that digital media should play.

(1) <http://www.pewglobal.org/2016/02/22/smartphone-ownership-and-internet-usage-continues-to-climb-in-emerging-economies/>

(2) <http://www.deloitte.co.uk/mobileuk/>



02 Executive Summary

A New Era Of Digital Fan Is Dawning

Today's new digital sports fan is demanding more from their game day experience than ever before. Nearly all sports fans with a mobile phone take their device with them to the stadium and conduct some online activities while at the game. This report highlights the opportunities for stadium and team owners who can tap into the growing need for faster high-speed network connections as sports fans are demanding more real-time digital information, creating and sharing more digital information, and using more digital channels before, during and after the game event.

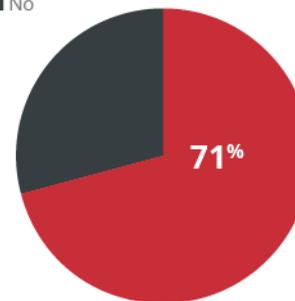
Sports goer's biggest game day frustrations are around access to digital information relating to venue, prices, food and drink, and logistics. **Stadium owners should take note that 70% of respondents said receiving special offers relating to food and merchandising on their mobile devices would improve their experience of the game.** But it is equally important for them

to be able to access information about the team when it comes to engagement and social sharing. Venue goers want access to streams of non-static, real-time information and newer technology, as **over 50% of sports fans said a virtual reality view of the field on their mobile device would improve their experience and 63% said video replays of the game would also improve their experience.** This study shows that stadia still have some work to do on the basics. Around one quarter of fans think that signal strength and web access is frustrating, while just under a third find download speeds frustrating.

Stadium owners and teams that provide more personalized digital experiences through stadium apps, digital offers direct to mobile phones, and game information on digital boards can increase fan engagement and generate new revenue opportunities. **75% of fans use digital game boards to get information,** however, more than

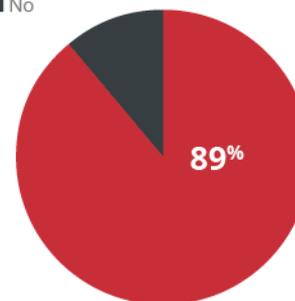
Post social media updates while at a stadium

■ Yes ■ No



Take photos of others while at a stadium

■ Yes ■ No



half of respondents have at some point used digital sources of all varieties, including the web, dedicated apps and social media.

Also revealed in this report is a significant shift in fan behaviour from viewers of the sport to content creators and broadcasters, as younger fans create far more media while at the stadium, and share more with social networks and public audiences while at the game and after. Fans are becoming a stadiums biggest online influencers. Standard mobile features like cameras for videos and photos, social media apps, and instant messaging have changed the way sports fans engage with their teams and each other at live stadium events. **89% of fans take pictures of others while at a game, 71% take selfies, and a significant 89% of the 18 to 24 year olds create videos when they visit stadia.**

The shift from viewer to broadcaster is most evident when you look at digital behaviors around publishing and sharing game related content to social media. This study shows that the majority of fans are sharing on social media while at the game, with **63% of those 35 and over admitting**

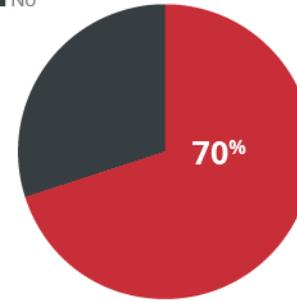
to sharing on social media, but that increases to a significant 90% of 18-34 year olds who post content on social media while at the stadium.

This study also uncovers the digital sports fans' intent to promote and share game updates and experiences. Of those that post on social media, **44% of 18 to 24 year olds do so because they want to share real time updates of events with their networks. And 51% of them say that they share social media updates in order to show support for the team.**

A digitally connected fan can help increase team and game engagement beyond the stadium walls through their online communities. Fans are sharing their experiences with an ever wider audience, as younger fans will post their content to more public audiences through social media, compared to the older fan who will mostly share with family and friends. In fact, more fans want to find out what others in their network are saying about the game on social media, over watching and listening to live commentary on their mobile device.

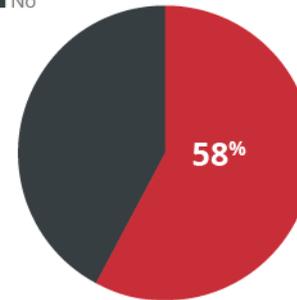
Make videos while at a stadium

■ Yes ■ No



Want live updates on athlete performance stats

■ Yes ■ No



A digitally connected fan is becoming a venue's biggest online influencer



This study confirms that digital fans can become a powerful asset and revenue opportunity. Stadiums need to work together with teams to create an integrated digital experience that matches fans high expectations. Using digital solutions across multiple channels will raise live event awareness, enhance team allegiance, and generate higher attendance. Delivering the right features, information and network connections will open up new revenue streams and significantly improve the sports fans game experience.

What are your main reasons for posting on social networks while at a stadium venue?



03 Fans Move From Viewers To Participants

Digital Sports Fans are Becoming Stadiums Biggest Online Influencers

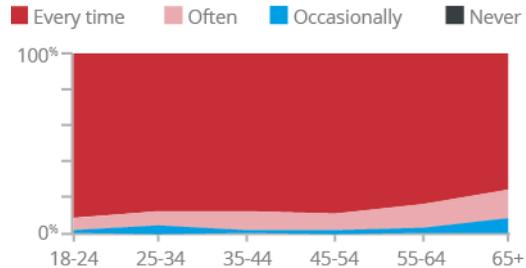


The game day experience is clearly undergoing a digital change. Not surprisingly almost all game fans with smartphones carry them throughout the day. But new internet connected devices are starting to play a part in the digital game day as well. Most notably with fans aged 34 and under who are more likely to bring tablets and smart watches to the stadium.

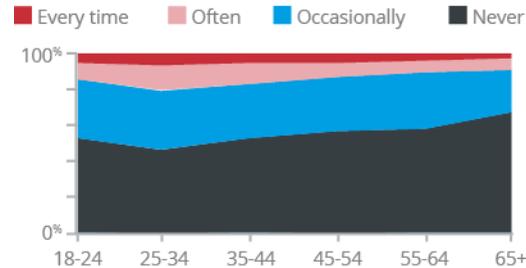
We asked the fans if they'd ever accessed specific applications on their mobile devices during game play. The results were surprising. While device usage is higher between game play, the lure of the digital world is still very tempting, with 64% of smart device owners confessing to having used social media during the game, for example. The most likely activity for all age groups during a game is

sending text messages, which is followed by instant messaging for the 18 to 24 year olds and social media in the other age groups. The 25 to 34 age group is the most digitally active while a game is in play, while the 65+ is the least active.

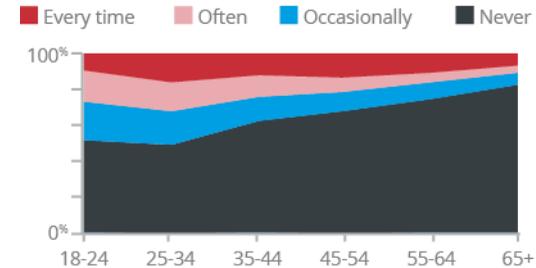
How often do you take your smartphone to a large venue while attending an event? By age group



Of those who take a smartphone, how often do you take a tablet to a large venue while attending an event? By age group



Of those who take a smartphone, how often do you take a smart watch to a large venue while attending an event? By age group

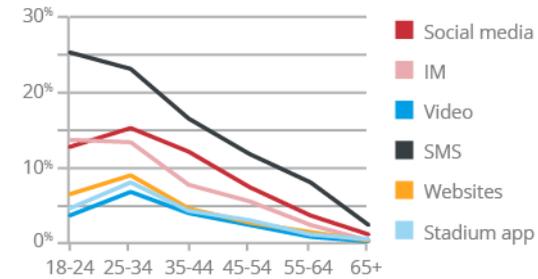


Of the fans who access digital specific services during the game, we took a look at those who confess to using such services every time rather than just occasionally. Fans in the US are most likely to be digitally active during game play, with 23% saying they will send a text message every time and 13% will be active on social media. Fans in Australia are the least digitally active while a game is taking place, as it seems UK fans have a predilection for instant messaging during a game, with 9% admitting doing this every time they're watching the action.

The digital divide is also notable when we look at gender. Of those who access digital services every time during game play, women are more likely than men to be using social media, instant messaging or SMS services, while men are more likely than women to be using video, websites or the stadium app. Stadiums wishing to maximize their visitor engagement should be taking into account these differences. The future stadium digital experience will be about personalisation of content and services.

The Millennials clearly stood out as the earlier adopters of new digital technology with a higher propensity to use their devices to enhance and participate in game day experiences.

How often do you access apps or services?
Proportion who answered every time, by age group



64% of smart device owners confessing to having used social media during the game



04 Fans Are The New Content Producers

That Digital Divide Of Content Creation

Fans are creating a lot of digital media while they are attending events in stadia. 89% of fans with mobile devices at the game use their devices to take photos of others, which tops the list of digital media. 71% are proud to admit that they like to take selfies, while the same proportion post on social media. Even video media was high, with 70% of device owners saying that they have created this type of media at an event, although 43% state that it is only an occasional activity. The US leads the way for the creation of video media - only one in five say they have never created this type of media.

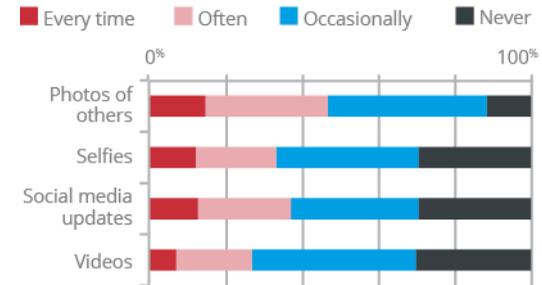
When it comes to the age groups, it is the 18 to 24 year olds who are creating the most content, as a quarter say that they create photos of themselves and photos of others every time they attend an event at a stadium. This drops to just 2% for selfies and 4% for photos of others in the 65+ age group.

Meanwhile, 90% of 18 to 24 year olds will post social media updates while at a stadium, of whom 22% say they do this every time they visit. This drops to 40% in the 65+ category, with only 2% in this group posting to social media every time. For video, the result is similar. 89% of the 18 to 24 age group create videos when they visit stadia and 16% state that they do this every time, a figure that drops to under 1% in the 65+ age group.

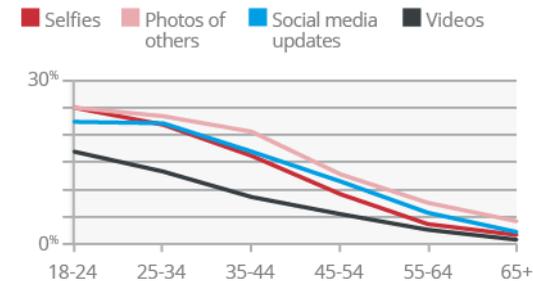
These figures show that demands for better network connectivity are only going to grow over time as younger fans generate more content and higher bandwidth video content.



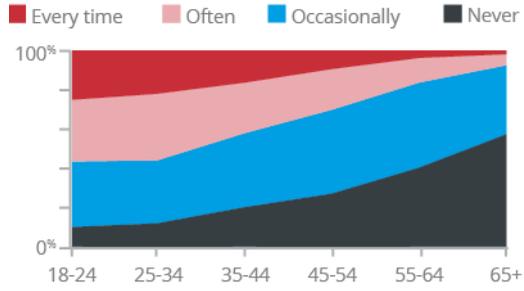
What type of digital media do you create while at a stadium venue and how often?



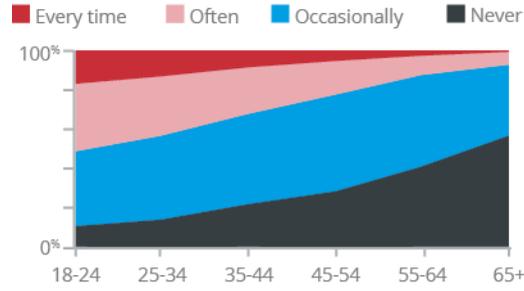
Proportion of people who create media every time they visit a stadium, by category, by age group



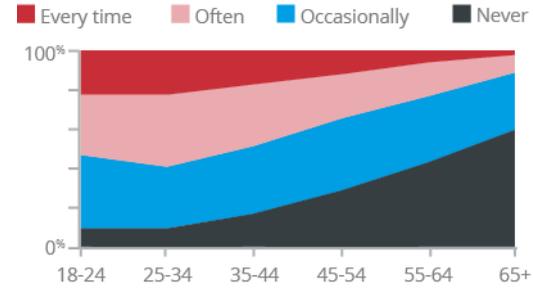
**How often do you create selfies while at a stadium?
By age group**



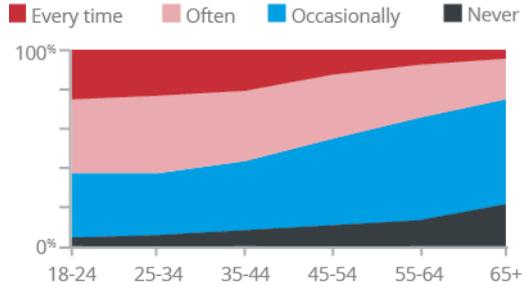
**How often do you create videos while at a stadium?
By age group**



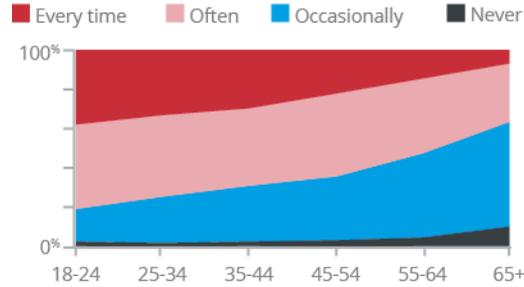
**How often do you post to social media while at a stadium?
By age group**



**How often do you create photos of other while at a stadium?
By age group**



**How often do you send text messages while at a stadium?
By age group**



05 Audience Reaches Far Beyond The Stadium

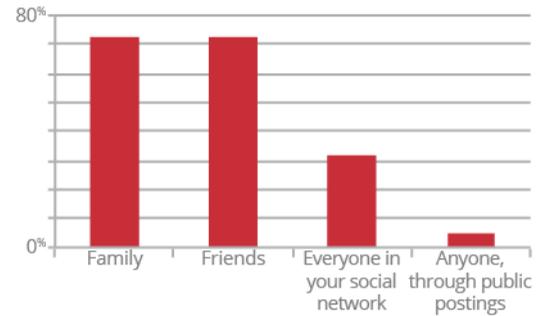
The Atmosphere Can Now Extend To Friends, Family And Increasingly Far Wider

Getting people online during an event offers benefits far beyond enhancing the experience of those in attendance. Visitors provide the best source of marketing hosts can have – these are the attendees that can encourage a much wider audience that they are missing out and that they should take part in the live atmosphere next time.

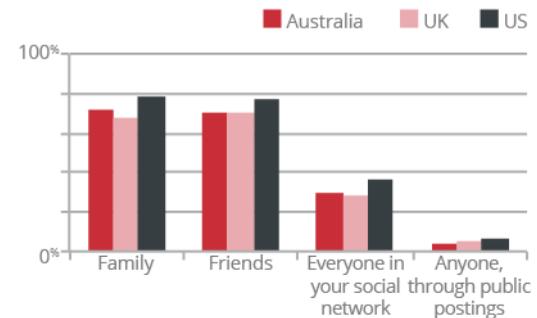
We asked people who they shared their game day content most with. Friends and family came out in equal importance, although almost a third of people share content with everyone in their social networks. US stadium attendees are the most likely to share their game day content with a wider audience, and are particularly ahead in terms of social media sharing. The UK was the only market where sharing with friends edged in front of sharing with family.

Sharing with everyone in their social networks is also more important to the younger age groups, a full 40% points higher in the 18 to 24 age group, which slumps to only 11% for the over 65 age group. And a full 10% of 18 to 24 year olds will share their content with anyone publically, including their selfies, photos of others and videos. Indeed, 14% of 18-24 year olds will share videos they create with everyone, every time they visit.

Who do you share game event media with?



Who do you share game event media with? By country

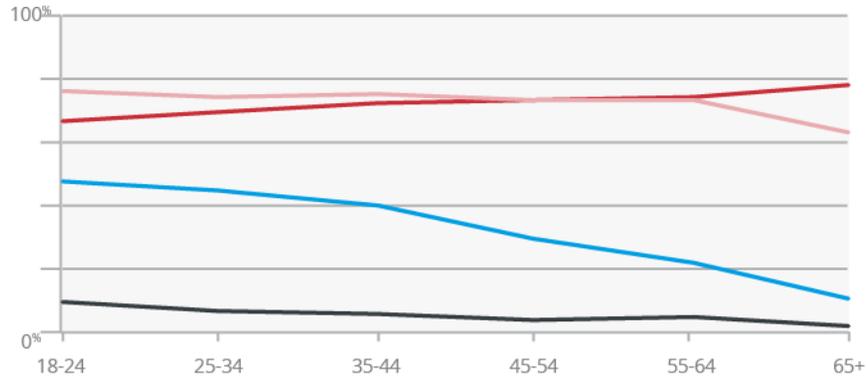


a third of people share content with everyone in their social networks

The gender split for social media is also present again, as women state they are far more likely than men to share their game day content through these channels, at 37% compared to 26% of men.

The trend for public postings, particularly in the younger age groups is a sign of far more user-generated content to come in the future. Stadiums can take advantage of this public broadcasting to increase earned media coverage, enhance team support and drive interest for future live attendance of game events.

Who do you share game event media with? By age group



far more
user-generated
content to come
in the future



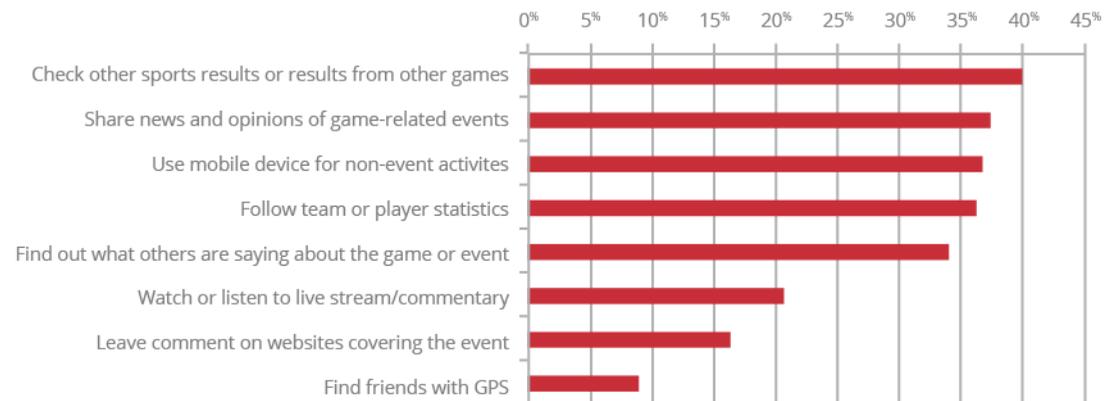
06 Making the Experience One To Remember

What Are Visitors Currently Doing Most While Online

With more people creating more of their own content about your venue and about their experience, now is the time to ensure that the digital influencers enjoy an experience that far exceeds their expectations. In order to find out how the experience could be improved, we decided to ask what kind of activities visitors were trying to achieve online while attending an event.

Being able to check other sports results or results from other games was the top activity, while sharing news and opinions about the game came in second. The results nod as well to our increasingly busy lives, with 37% wanting to use their devices for non-game related activities, in third position. Following team or player statistics also enjoys similar popularity at 36%. Find out what others are saying about the game or event follows at 34%. Watch or listen to live stream/commentary is at 20%, leave comment on websites covering the event at 16%, and find friends with GPS at 8%.

What kind of online activities do you like to do while at a stadium venue on your mobile device?

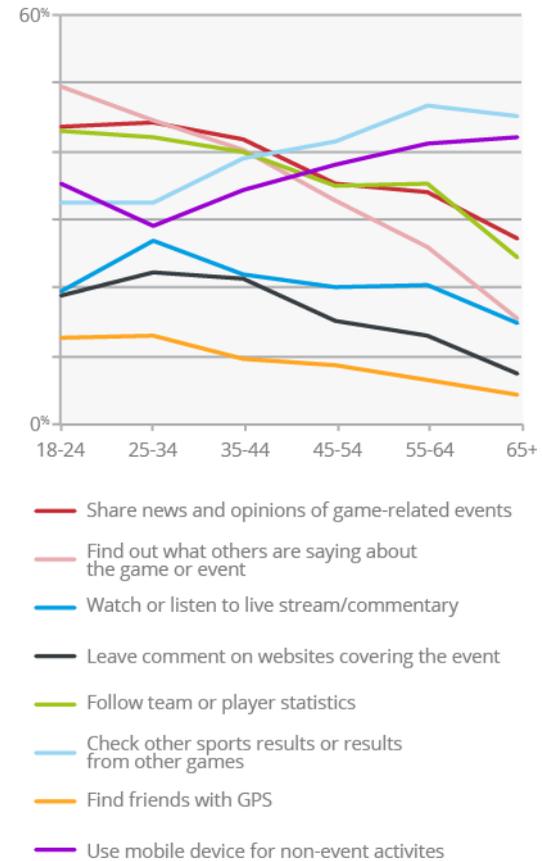


What's really interesting is how the priorities change according to the age groups. For the 18-24 year age group, finding out what others are saying about the game or event is the key activity, while for the 45 year-olds and above, checking the events in other games becomes the most common activity. This shift in priority underlines the increasing importance that younger age groups place in peer-led reviews and opinions.

Meanwhile, the importance of being able to share ones own news and opinions also enjoys higher popularity among the younger age groups, and in fact is the top answer for the 35 to 44 year-olds. We will continue to see the emergence of the fan-driven content creation and distribution culture, as these groups look to establish digital communities that centre around their common interest in the team's success.

Another side-effect of the information era can be seen in the desire to follow team or player statistics, which is almost on a par with sharing for the 18-24 age group. Thirst for real time information will undoubtedly augment.

What kind of online activities do you like to do while at a stadium venue on your mobile device? By age group



finding out what others are saying about the game or event is the key activity



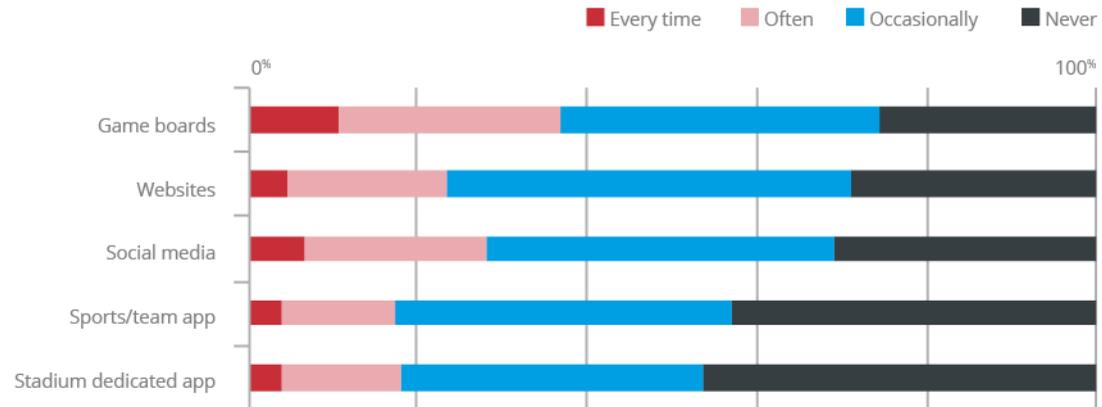
07 The Digital Source

The Desire To Share Opinions Is On The Rise, But Where Do Fans Turn For Input During An Event?

The digital game boards are the most popular place that visitors will turn in order to get information during an event, with 75% saying that they use this source. However, more than half of respondents have at some point used digital sources of all varieties, including the web, dedicated apps and social media.

However, the ever growing hunger for information becomes even more evident when we look at the answers from the different age groups. Even for the most popular source of information, the game board, those in the 18 to 24 age group say that they are more than twice as likely to use it for information relevant to their experience.

What sources would you use to get information on the event while attending the stadium and how often?



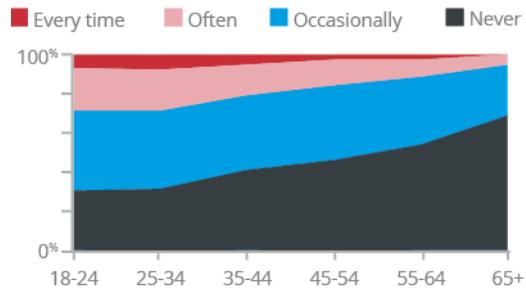
Meanwhile, the biggest generational difference can be found in social media. While under 1% of 65+ year olds use this as a source of information, more than one in ten 18 to 34 year olds say that they use this as a source every time they visit a stadium. At the youngest end of the spectrum, 92% of 18 to 24 year olds use social media as an information source, compared to 38% in the 65+ age category.

Women are more likely than men to use social media as a source of information, at 76%, compared to 62% for men. Social media is most popular among fans in the US, with 9% of all respondents claiming that they now turn to social media channels every time, compared to 6% in the UK and just 4% in Australia.

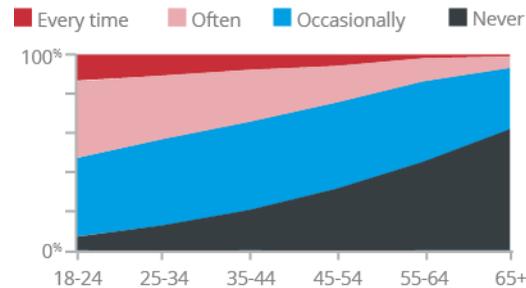
We can also expect the dedicated stadium app to increase in importance. The number of people aged 18 to 34 who use the stadium app for information is more than double those in the 65+ age group. Usage is lowest in Australia, where less than half use a stadium app.

Social media is most popular among fans in the US

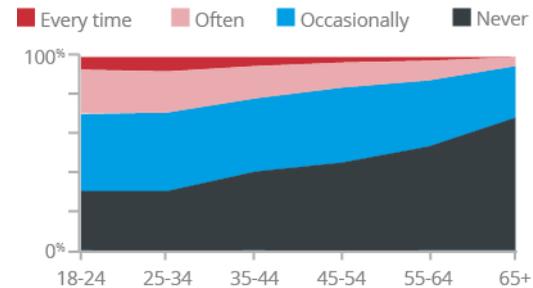
How often do you get info from game boards?
By age group



How often do you get info from social media?
By age group



How often do you get info from stadium app?
By age group



08 An Appetite For Improved Digital Experiences

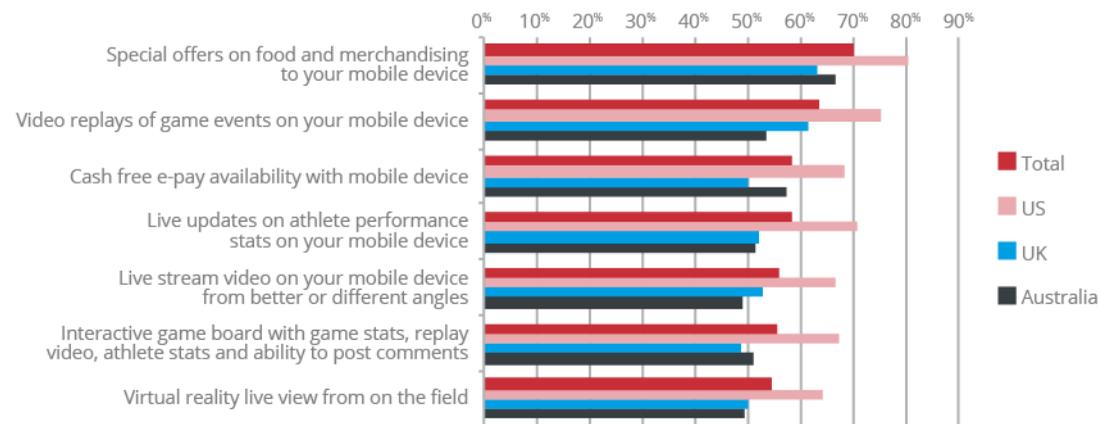
Food Is A Priority, Plus More Convenience And More Information

Food comes out as the top priority for visitors to stadiums with fans saying that they found food to be expensive and difficult to access. No surprise then, that 70% of respondents stated that receiving special offers relating to food on their mobile devices would improve their experience of the game. Many of them also said that having better information on food available would also be a plus.

Video replays of game events on mobile devices would also improve the experience, with 63% of visitors agreeing. Many respondents had specific requests on this topic, for example one UK fan, on being asked what would make the game day better, comments: "Being able to see up close slow motion replays of key parts on my phone."



What digital services would improve your experience at the stadium?

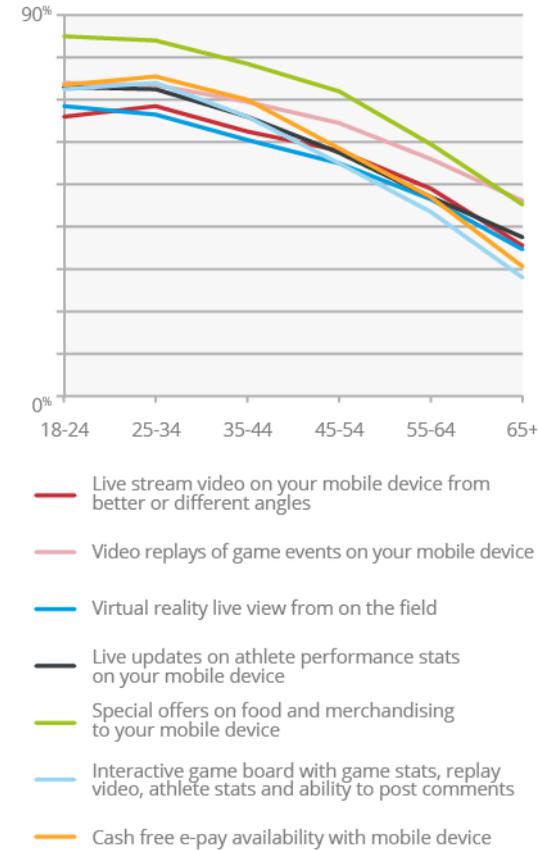


A cash-free experience comes in third position, although it is the 25 to 34 age group that put the highest emphasis on this feature. As one fan said: "If one can order and pre-pay for food via phone and go to designated pick up area, instead of waiting in line," that would improve the experience of the day, as well as encourage use of a stadium app and lead to increased sales. In Australia, elimination of cash actually came in second, ahead of the video replays.

In the US, on the other hand, fans were more interested to see live updates of player stats on their devices, placing this above the cash-free experience. Overall, 58% agreed that this functionality would improve their experience of the day, a figure rising to over 70% for the 18 to 34 year old groups.

The same was true of the interactive game board that includes the ability to post comments. While enthusiasm is high in among the 18 to 34 year olds, this drops to under 30% in the 65+ age group.

What digital services would improve your experience at the stadium? By age group



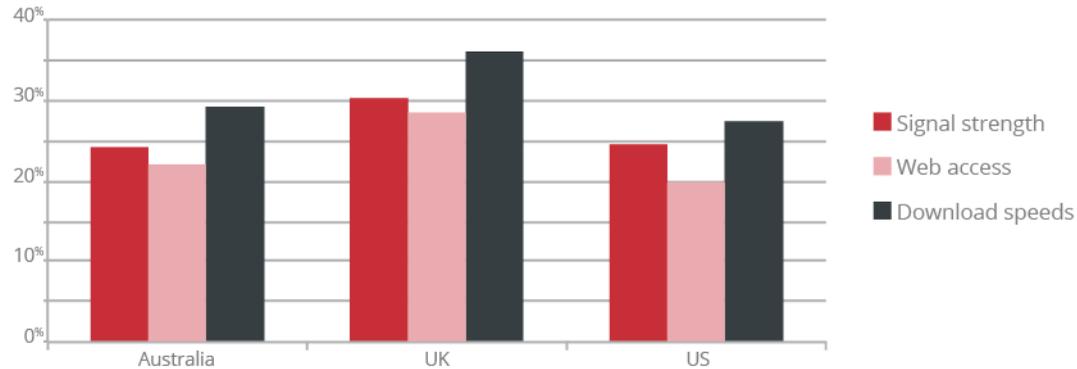
09 Fans Demand Better Connectivity

Download Speeds Are The Biggest Concern, With UK Fans Most Frustrated

While this report clearly shows there is increasing appetite for stadium apps and other dedicated digital services, the ability to deliver this effectively comes down to whether fans can get online or not. And, on that point, there are high levels of frustration which stadiums need to address for all age groups and countries if they want to see younger fans attend live events in the future.

For example, across the three countries surveyed, over a quarter of fans say that signal strength is something they find frustrating, while almost one-third say the same about download speeds. And access to the web is also an issue. Almost one quarter say that they find this frustrating.

Rate your experiences of trying to use your smartphone while attending an event at a stadium? – Proportion who responded they find signal strength, web access and download speeds frustrating :

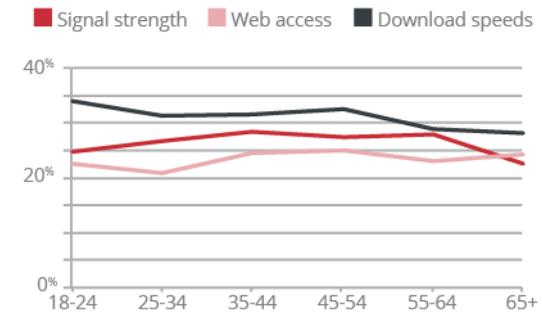


The highest levels of dissatisfaction are found in the UK, where the biggest annoyance is download speeds. 36% of fans say that network speeds are simply not good enough. This figure drops to 29% in Australia and 27% in the United States but shows that, in all three countries, there is still much room for improvement.

These levels of frustration are fairly evenly distributed across the various age groups, although it is the 18 to 24 year olds who have the greatest frustrations when it comes to download speeds, with 34% saying that this is an issue for them. Older age groups are increasingly more patient when it comes to this issue, although dissatisfaction still runs high, with 28% of over 65s feeling disgruntled with the download speeds available.

For the increasing information hungry digital fan, improving access to the internet has become a basic priority. It will be even more urgent if stadium owners wish to introduce new features in the future. When we asked one Australian rules football fan in Queensland about this, his response is clear: "It's impossible to get a decent signal to be able to use basic apps to get player names and statistics as it is, without introducing video streaming and virtual reality etc."

Fans levels of frustration with networks, by age group



It's impossible to get a decent signal to be able to use basic app...



10 Conclusion

We Leave This To The Fans, Who Tell Us What They'd Like To See Improved

These results demonstrate not only how fans' expectations are changing - but also the extent to which there is a behavioral shift towards using newer digital channels and features, consuming more personalized digital content on mobile devices, and creating and sharing digital information. It shows that venue owners will have to work increasingly harder in the future, if they fail to keep up with the changing expectations of today. But for those that do, there are new revenue opportunities.

It's also motivating to note that sports fans, far from being distracted by the lure of mobile devices, are more likely to be looking for services that enhance their overall experiences of the day - information from multiple sources that they can access any time, anywhere. So while information about the venue facilities, food and merchandising are all important, it is equally important for them to be able to access real-time information about the team, the players and athlete stats.

For stadium owners and teams who get the digital engagement right, they will be rewarded with loyalty and 'extra' publicity by fans sharing their experiences with ever wider digital communities. From pictures to video to real time game updates, fan generated content goes beyond the stadium walls and outward to friends, family - and increasingly broader online audiences.

The digital stadium experience can also be used to reward fans for their commitment and dedication. We see that in the answers that they themselves have given. As one fan told us: "Stadium apps and coupons for food and merchandise," would improve the experience of the day. Another fan suggested: "More promotional give-aways: caps, flags, key chains, tickets to future games." There are also frustrations with inefficient service and queues that are too long - which are all aspects that can be improved for the fan through a digital stadium experience.

Overall, it seems, that most fans just want to be connected - in today's culture, where the fear of missing news and information, or being unable to access it, impacts enjoyment, this is an absolute 'must-have' for the digital fan. The ball is in the court for the stadium owners and teams to provide faster connections and more digital content to improve fan experiences if they hope to reap the rewards.



AVAYA

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About Spider Marketing

Spider Marketing is a boutique content marketing and strategy agency who create original marketing campaign assets to generate engagement across multiple platforms and channels. Through developing in-depth original pillar research and reports they help brands build a unique voice in the market so conversions and engagement soars.

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