

The logo consists of the letters 'GMR' in a white, sans-serif font, centered within a solid black square.

GMR

FUTURE-PROOFING

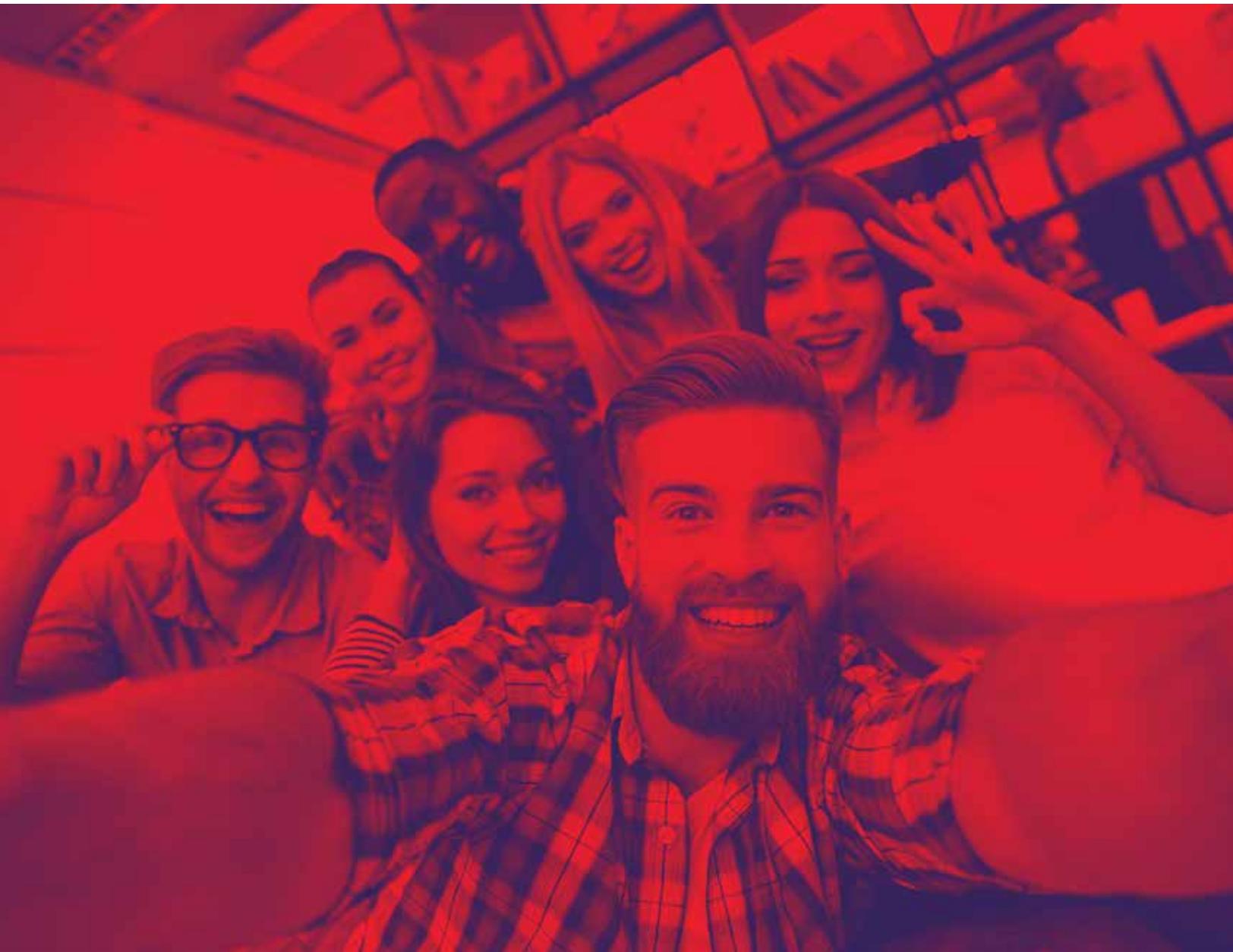
**THE
SPORTS
FAN
EXPERI-
ENCE**

Understanding why fans attend live sports—
and how younger fans are changing the game

ABOUT THE RESEARCH

Future-Proofing the Sports Fan Experience is an extension of *Experiential EQ*, proprietary research and analysis conceived and powered entirely by GMR Marketing's in-house Strategy team. Conducted over the course of many months, our data comes from firsthand field interviews, field surveys and online panels of 2,000+ experience seekers at 15 different types of events.

GMR Strategy is a leading team of marketers, strategists and psychologists within GMR, who dig into the “why” of branding and brand experiences every day. *Future-Proofing the Sports Fan Experience* and *Experiential EQ* are part of the team's work to yield strategy as an applied science across marketing processes, tools and campaigns—including proprietary approaches to consumer psychology at live events, sponsorship and partnership measurement, experiential efficiency/efficacy benchmarks, and quantification of brand memory and recall.



**TEAM SPIRIT.
TEAM LOYALTY.
TEAM TRADITIONS.**

Images of tribalism and competition in sports are strong. So when GMR visited live events across the U.S. to research why people attend, our hypothesis was that fans attend sporting events to revel in the camaraderie, the shared passions, the us vs. them. That team loyalty and tribalism rule all.

But it's not that simple.

15 events and over 2,000 research participants later, our data turned this assumption inside out. It doesn't matter how packed the stadium is with team colors and hometown chants—***tribalism is not the primary driver of attendance at sporting events.***

THE EXPERIENTIAL EQ FRAMEWORK

To understand our findings, you need to first understand the framework of *emotional need states and experience territories* that our initial research uncovered, published in detail in our *Experiential EQ* report.

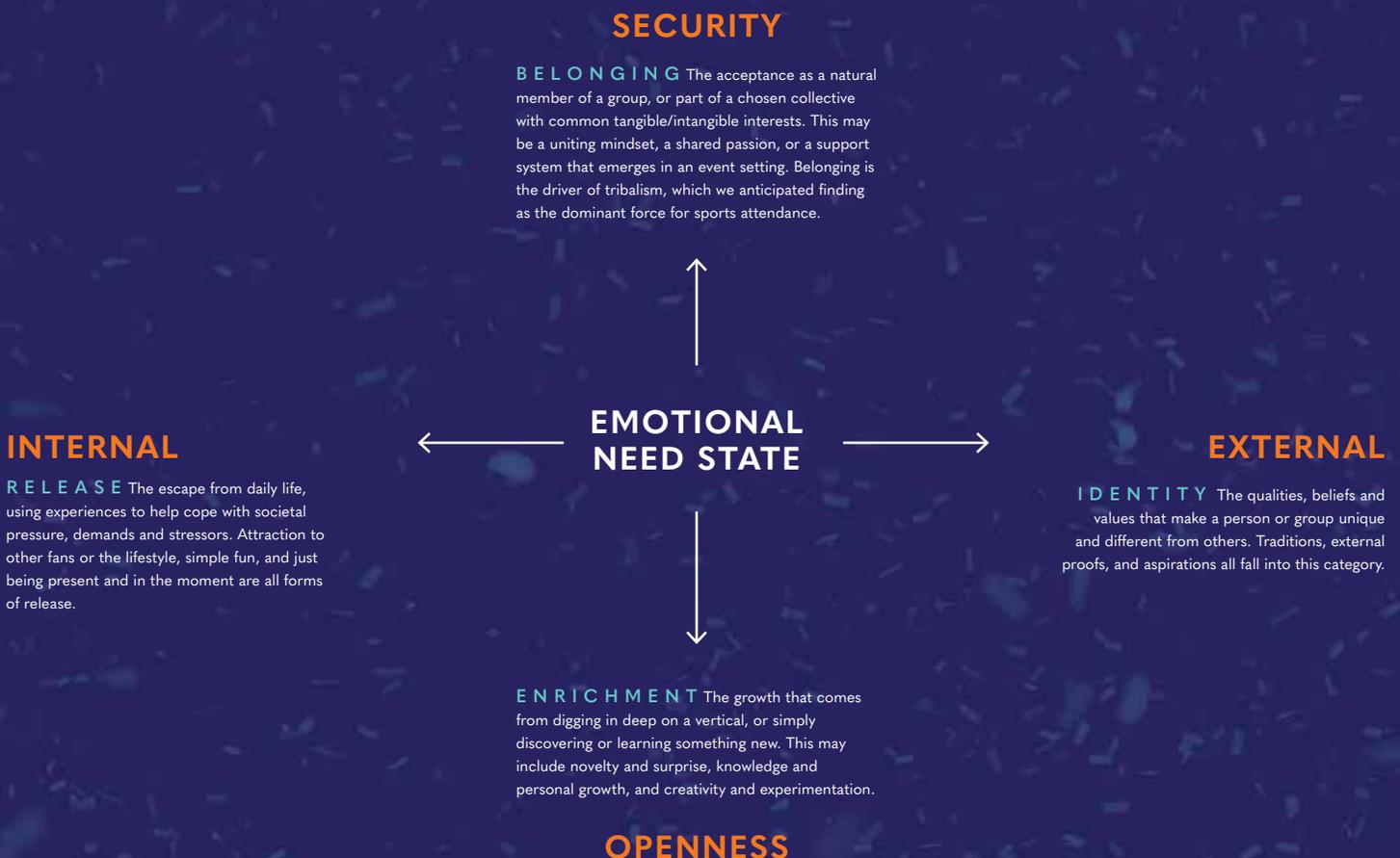
The primary question driving our research was: “Why do people seek out live events?” With so many entertainment options, many of which are more convenient and lower cost, what is it that brings people to an event?

We identified four primary *emotional need states* that drive people to seek out experiences at events: belonging, identity, enrichment and release. These need states are emotional and complex, and as illustrated, they can be mapped onto a spectrum of internal vs. external and security vs. openness.

These need states are universal, deep and important—shared across fixed cohorts and audience segments. They are the deep human needs that drive experience seekers, usually unconsciously, to attend live events.

If belonging isn’t the dominant emotional need state at live sporting events, then what is? Release.

Universally, release is the leading emotional need state of event goers across all event types, including sports. Release is base, uncomplicated, inherently and wildly human, and at its most simple, a heck of a lot of fun. Its dominance in live events applies from the runway to the rodeo, from college bowl games to dusty music festivals.



WHAT DRIVES FANS TO LIVE SPORTS EXPERIENCES?

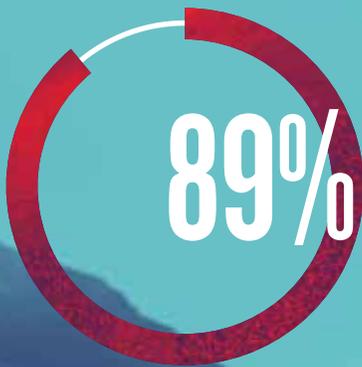
Release dominates across all event types, but it holds a special place in sports. Sports event goers rank the need for release slightly higher than do event goers overall (89% vs. 87%)—and *nearly twice as important as belonging*.

Yes, belonging plays an important role in the total fan experience, but our data proves that it's not the main reason people attend sporting events. They come to forget work stress, politics, responsibilities and the pressures of 'the real world.' They come to get lost in the moment. To eat, drink and raise a primal cheer. To feel the excitement of the big play and the thundering energy of the crowd. The game, the match, the race—live and in person—is the height of release.

Sports fans say the release of live events is nearly twice as important as belonging.

We also asked sports fans what makes them most excited about attending live events. They ranked *atmosphere and excitement* 24 points higher than any other reason—far above being a fan of the team, or spending time with friends and family.

While fans love their team and sport, there are often other reasons that drive attending live sports events.



RELEASE



ENRICHMENT



BELONGING

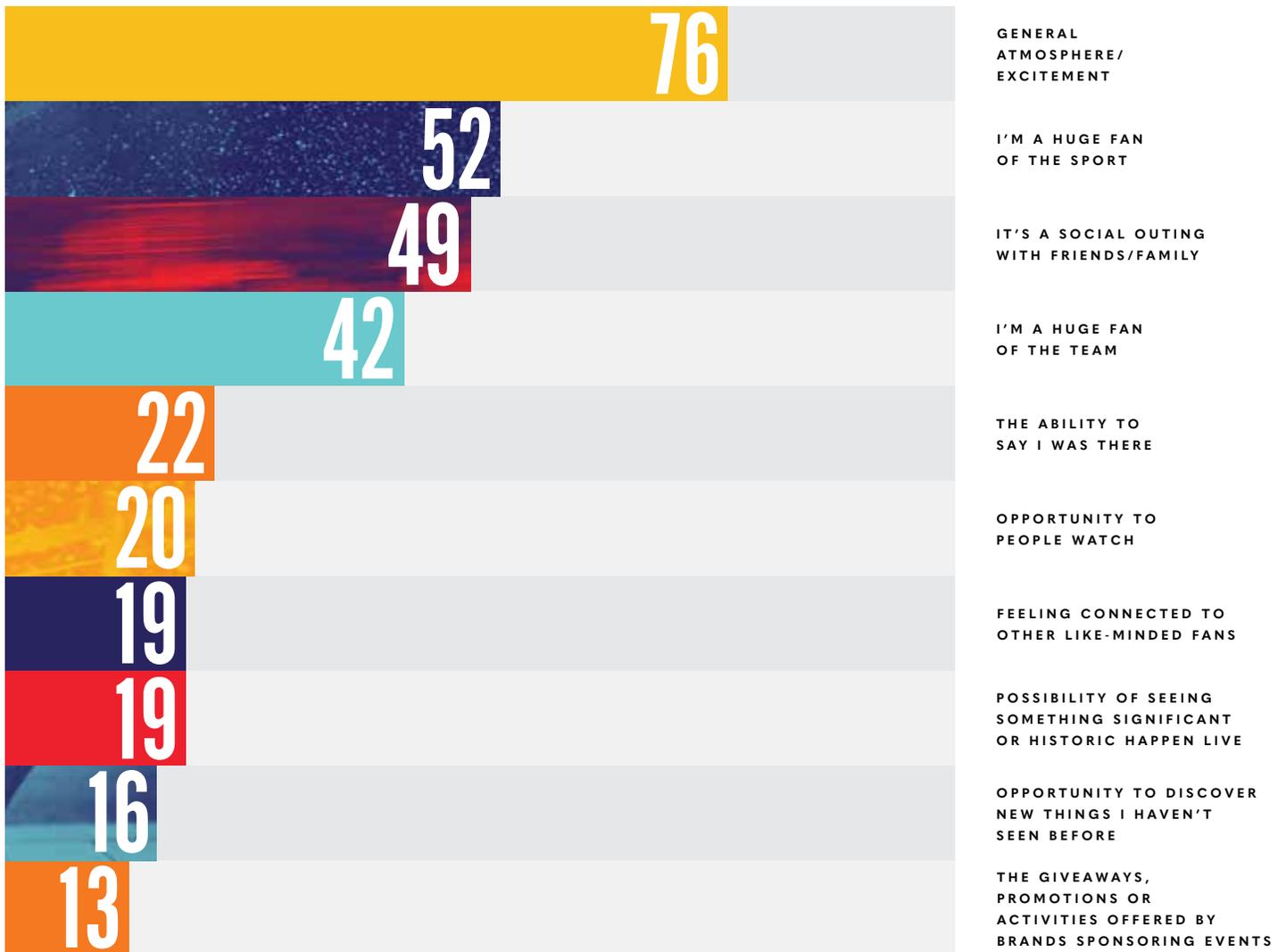


IDENTITY

Sports fans say the *release* of live events is nearly twice as important as *belonging*.

Why do you enjoy attending live sporting events?

[PERCENT OF FANS]



DESIGNING NEED-BASED SPORTS EXPERIENCES

Our Experiential EQ research discovered the four emotional need states that explain why people attend live events. So how are those needs met in the event environment? Through surveys and interviews, we identified eight distinct *experience territories* that correspond to the four emotional need states—and directly fulfill those needs:

COMMUNITY

ACCESS

SELF-EXPRESSION

ESCAPE

DISCOVERY

ACCEPTANCE

FUN

EXCLUSIVITY

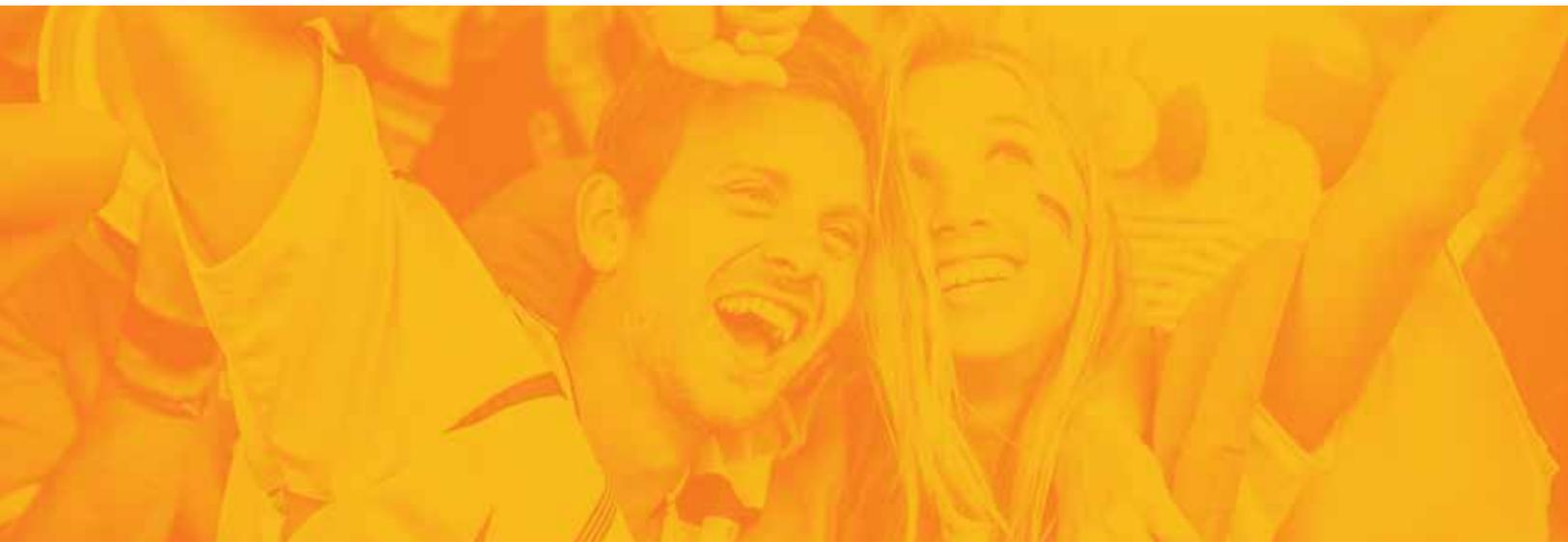
Creating engagements that evoke and embody these interrelated emotional territories allows brands to meet their audience on the deepest levels—by speaking to their underlying emotional needs. This places the brand squarely within the emotional fulfillment of the live event—and the memories made there.



DESIGNING SPORTS EXPERIENCES TO DELIVER RELEASE THROUGH FUN

By bringing in the right fan experience at the right moment, a brand can strengthen, and become part of, the critical memories an attendee takes home with them. So when sports fans come seeking release (emotional need), brands who use the event to deliver fun (experience territory) are well-positioned to meet that need and make a stronger connection.

But what constitutes a fun experience, and how can your brand leverage that understanding to build memories? Our research goes another level deeper—organizing our 2,000 attendee responses by specific attributes and the emotional payoff they deliver. Through this research, we've identified 4 key elements that comprise fun in a live sports setting.



COMPETE

Competition is a compelling driver for those seeking to channel pent-up energy or forget the stress of the day. The heart-stopping excitement of beating a rival team, seeing your favorite player set a record, or witnessing a once-in-a-lifetime play can be a powerful and cathartic emotional release.



PLAY

Many people pursue events simply to be entertained and blow off steam—tapping into the joy of childish pleasure. Dressing up in team attire, getting lost in the stadium's energy, and splurging on a souvenir from the pro shop are all examples of how sporting events evoke the spirit of simple fun.



JUST BE

The need to be right here, right now is deeply human and shared by us all. The moment-by-moment nature of athletic competition provides exactly this type of escape, allowing fans to forget the stress of daily life and just focus on the present.



ATTRACT/RELATE

Experiences allow people to connect to others through a genuinely shared interest or passion. Sports events are a great venue for attendees to meet like-minded people, building human connections that may last an afternoon—or a lifetime.

How this comes to life is different for every brand and every setting. When using this framework to design experiential activations for our own clients, GMR interweaves our understanding of three elements:



No two activations are ever the same. A product launch at an esports competition will be very different from a brand targeting a new demographic at a soccer tournament.

Understanding the experiences attendees are looking for—and the emotional needs that underlie them—is critical to developing brand experiences that don't just entertain, but connect.



SPORTS FANS ARE NOT HOMOGENEOUS

Within the body of sports fans, our data found that different age groups and cohorts weigh aspects of the sports experience differently.

Fans over 35 weigh *release* 7 points higher than younger fans

18-24 year old fans prize *discovery* 30 points higher and self expression (*identity*) 5 points higher than older fans

Women are 11 points more likely to look to sports for *discovery* than men

Life stage certainly contributes to some of these variations. Younger fans are still carving out their individual identities (self expression), and older fans are more likely to have established lives and responsibilities that stress them out (release).

But generation is also at play here. Many of the differences we noted set 18-24 year old fans apart from the rest, aligning with what we know about Generation Z and reinforcing what many sports entities are already discovering.

FUTURE-PROOFING THE SPORTS EXPERIENCE

Younger fans are game for attending live sporting events, but their preferences and interests—their emotional need state—breaks from the ‘traditional’ sports fans of older generations in ways we expect to endure even as they age.

These are audiences who view sports not as a singular vertical interest, but as part of their total entertainment set.

Only 29% of 18-34 year olds we met at sporting events were there because they were fans of the teams playing.

01 GETTING LOST IN THE MOMENT [RELEASE]

Yes, all sports fans like release. But the younger the fan, the less they value release compared to the other need states. They want to have fun, but for them, it is filtered through the things that make the event distinct and memorable.

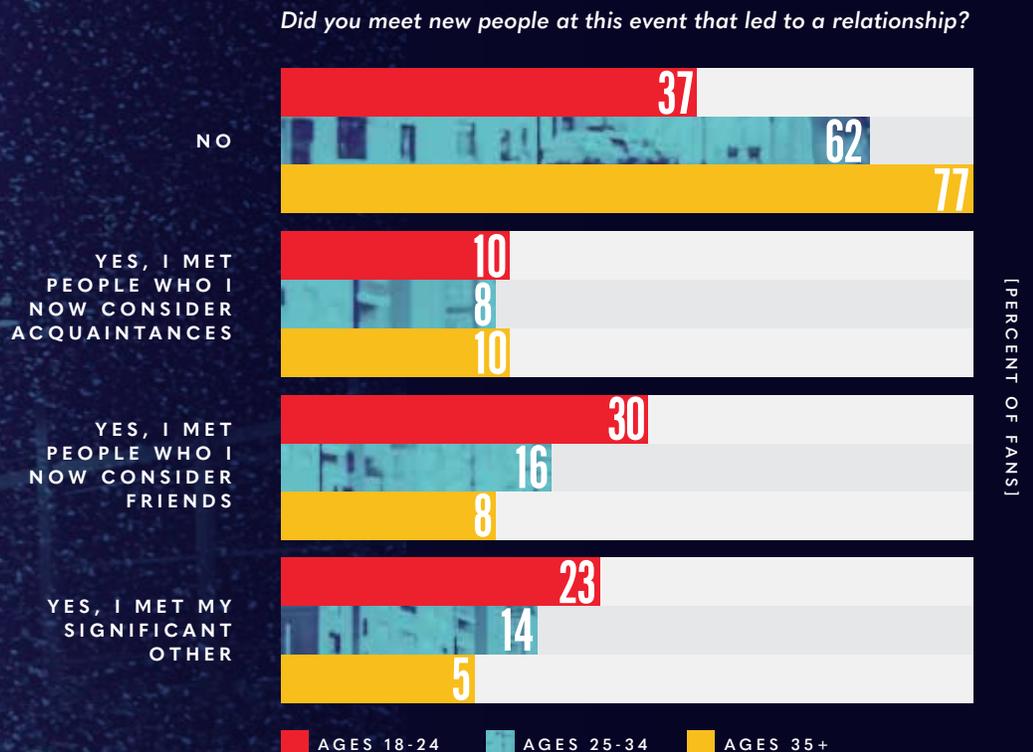
Younger fans are happy to watch the game, but they’re even more interested in the energy of the crowd, the atmosphere, the general entertainment value of the experience—and how it all makes them feel.

This is an opportunity to expand how we think about the live sports experience—but it also places sport in greater competition for its slice of the entertainment pie. Here’s what the data tells us to consider regarding younger fans’ preferences for live sports. This is what today’s younger fans are already seeking—and what sponsors and teams will need to provide more of to stay competitive.

02 SOCIAL CONNECTIONS [BELONGING]

Community is still part of the sports experience for younger fans, but they experience it differently. They are less about team spirit and more about meeting and connecting with new people.

Younger sports event fans are much more likely to meet people at events that lead to new relationships. Fans under 18-24 are 22 points more likely than those over 35 to say they met people who are now likely to be friends, and 18 points more likely to say they met their significant other at a sporting event.



03

MEME-WORTHY CONTENT [IDENTITY]

Nearly 1/3 of 18-24 year old fans told us that having something to share on social media is a motivating factor for attendance. And 18-34 year old fans are significantly more interested in opportunities to both express themselves and discover something new than those over 35.

Live events are fertile ground for Instagrammable moments that build social cache. But this is deeper than photo ops and selfie-worthy backdrops. It's about offering up new and enriching experiences fans can put their own stamp on. The more unique—unexpected, exclusive—the better. Content that fans can repurpose and repackage in their own style helps them build their personal equity via social media.

I enjoy attending live sporting events because it gives me something to post about on social media.



04

GAME TOURISM [ENRICHMENT]

Another interesting dimension important to younger fans is the event's location. Not that the game is close to home—as older respondents preferred—but that it's located somewhere interesting to visit. Game tourism appears to be a motivator for the younger group, who was less worried that a game be local or work well with their schedule. Again: it's not just the game itself, but the value of the overall experience it delivers.

What were the most important factors involved in your decision to go to this sporting event?

18-34 YEAR OLDS

1. COST OF TICKET WAS AFFORDABLE/FREE (44%)
2. BIG FAN OF THE SPORT (41%)
3. EVENT IS NEAR WHERE I LIVE (41%)
4. BIG FAN OF THE TEAM (29%)
5. EVENT IS IN A LOCATION I WANTED TO VISIT (26%)

35+

1. EVENT IS NEAR WHERE I LIVE (49%)
2. BIG FAN OF THE TEAM (45%)
3. COST OF TICKET WAS AFFORDABLE/FREE (43%)
4. BIG FAN OF THE SPORT (43%)
5. EVENT DATES WORKED WITH MY SCHEDULE (27%)

WHAT IT ALL MEANS

Our research into the deep human needs driving event goes to live experiences found that **release** reigns supreme. This is all the more true of sports fans, who value release twice as much as they do **belonging**, despite the very real depth of team loyalty. When it comes to attending games, they are there to leave their worries at home and get lost in the excitement of the moment.

Younger fans share this desire to blow off steam at live sports events. But the quality and type of experiences they're looking for depart from traditional fan preferences. These are fans who see sports as just one part of the entertainment pie. They want sporting events to transcend competition and deliver immersive entertainment experiences, social connection, and moments of unexpected fun.



WE BELIEVE EXPERIENCE MATTERS.

Designing experiences that meet these complex and nuanced needs is both an art and a science. As an innovative, insight-based sponsorship and experiential agency, this is what GMR does day in and day out.

If you're interested in digging deeper into how to not just speak to your audience, but engage them in deep and memorable ways, contact GMR Marketing.

Founded in 1979, GMR is an innovative global sponsorship and experiential leader, connecting brands and their consumers through shared passions. We change how people think, feel and behave through the power of experience. Experiences founded on data, rooted in insight, grounded in strategy, designed meticulously and executed flawlessly.

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