Power Play:

The Future of Venues

Contents

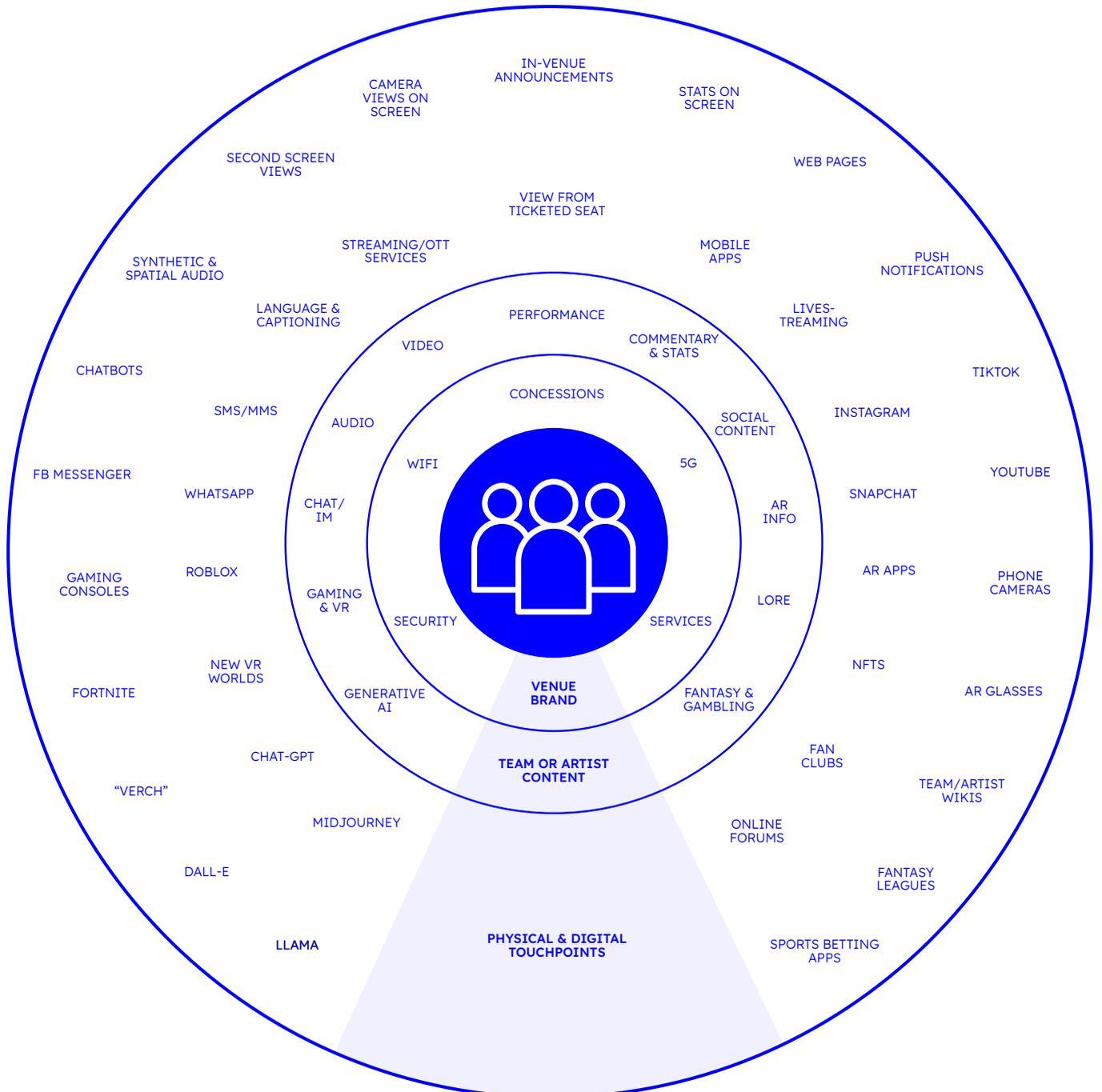# Future Venues Need to Exceed Fan Expectations

Fans expect ever closer relationships with favorite musical artists, sports clubs, and their stars. At the same time, intellectual property (IP) owners have an increasing array of digital and real-world touchpoints to foster connection with these fans, especially with the advent of new technologies such as AI and spatial computing. The gaps are only growing wider between what venues offer and what fans desire.

For today's fans, a venue is anywhere they can go to experience something live with an artist or team's IP—no matter whether the event is in person, digital, or a blend of both. This is a radical reframing of what it means to be a venue owner or operator. Future fans expect immersive and seamless event experiences that can happen simultaneously in real- world stadia, online, or both.

If this is where venues are headed, what should you build to wow fans in the long term? In this report, we'll explore the passion of today's fans, and how their relationship with artists and teams will reshape venues of the future. We'll help you think strategically about where to invest when building new venues and event experiences both in person and online.

Better Connect Fans with Artist and Team IP

By putting fans at the center, venues can partner even more closely with artists and teams—and curate the right touchpoints and technologies to exceed fan expectations.

IN-VENUE ANNOUNCEMENTS
CAMERA VIEWS ON SCREEN
STATS ON SCREEN
SECOND SCREEN VIEWS
WEB PAGES
VIEW FROM TICKETED SEAT
SYNTHETIC & SPATIAL AUDIO
STREAMING/OTT SERVICES
MOBILE APPS
PUSH NOTIFICATIONS
LANGUAGE & CAPTIONING
PERFORMANCE
LIVES-TREAMING
CHATBOTS
VIDEO
COMMENTARY & STATS
TIKTOK
SMS/MMS
AUDIO
CONCESSIONS
INSTAGRAM
SOCIAL CONTENT
FB MESSENGER
WIFI
5G
YOUTUBE
WHATSAPP
CHAT/IM
AR INFO
SNAPCHAT
GAMING CONSOLES
ROBLOX
AR APPS
PHONE CAMERAS
GAMING & VR
LORE
SECURITY
SERVICES
NFTS
NEW VR WORLDS
AR GLASSES
FORTNITE
GENERATIVE AI
VENUE BRAND
FANTASY & GAMBLING
FAN CLUBS
TEAM/ARTIST WIKIS
CHAT-GPT
TEAM OR ARTIST CONTENT
"VERCH"
ONLINE FORUMS
MIDJOURNEY
FANTASY LEAGUES
DALL-E
LLAMA
PHYSICAL & DIGITAL TOUCHPOINTS
SPORTS BETTING APPS

The Four Keys to Fostering Fandom

Fan behavior has changed quickly since the start of the Covid-19 pandemic, with four key expectations emerging across fandoms for live music and sports. Enabling these new fan behaviors will lead to new revenue unlocks for venue owners and operators, as well as the implementation of venue designs that are radically different from those of the past.

1. Control
2. Co-Creation
3. Ownership
4. Authenticity

1. Control of perspective and role in the event

Fans believe they should have an active role in shaping event experiences, and want the power to control their point of view when engaging with live music and sports. This is influenced by heavy fan use of streaming media, gaming (Fortnite, Roblox), and social video platforms (TikTok, YouTube), as well as increased immersion in events due to innovations in home audio/video technologies (4K, spatial audio and computing). Artists and teams are catching up to where they fit into these fan behaviors.

What Changes About The Venue?

- From fixed-seat perspectives to **unrivaled access** to the entire field of play and layers of virtual information.

- From 'lean-back' spectating to 'lean forward' **direct engagement** with talent and other fans before, during, and after events.

- From tolerating poor audio/video quality to **curating and directing** audio, video, and multilingual commentary at broadcast quality or higher (2D, 3D, MX) both in venues and at home.

What New Revenue Is Unlocked?

- Upselling of access to unique views, data, and interaction with talent.

- Increased sponsorship opportunities for surfaces and content.

2. Co-creation of new touchpoints and lore

The boundaries between fans and what they love have dissolved completely. Fans view themselves as collaborators with their favorite artists and sports teams, co-creating directly with ingredients provided explicitly for that purpose. Just like in video games, fan-generated stories and quests enrich artist and team lore, leading to new touchpoints for connection and adventure.

What Changes About The Venue?

- From watching official content to **reacting, remixing, and collaboratively creating** official and unoffcial content.

- From purchasing official merchandise to **creating, selling, and re-selling** artist-adjacent products.

- From being unable to attend sold-out events to **creating bespoke events** for fans to connect and celebrate their shared passions.

What New Revenue Is Unlocked?

- Expanding monetizable artist IP based on fan input.

- Creating new sales outlets for merch and verch (virtual merch).

- Increasing royalties from ancillary ticketed events.

3. Ownership of unique and personalized experiences

Fans continue to seek out exclusive experiences, from front-row seats and merch to artist and team brand tie-ins. Money can buy what's rare, but variable rewards and surprises can be what increases a fan's passion for an artist or team. All of this leads to sharing of experiences and reactions on social media, driving viral loops that activate other fans.

What Changes About The Venue?

- From picking a great seat to **creating exclusive bundles** that blend event experiences with unique products and branded services.

- From just attending the show to **discovering rare "easter eggs"** that lead to exploration and adventure in and around venues.

- From sharing the event experience to **showing off and trading** tangible tokens from the event.

What New Revenue Is Unlocked?

- Increased purchase of exclusive products and services, both within the venue and in partnership with local and global brands.

- Increased opportunities to package venue events and services together into high-value multi-day experiences.

- Increased market and resale opportunities for both physical merch and virtual tokens.

4. Authenticity in life, work, and play

Fans expect intimate two-way communication with artists and players as distinct human beings. This can include exclusive views into what's happening behind the scenes, as well as reactions, role playing, and fantasy reenactments. For younger fans, all of these activities can happen in a digital gaming environment or on a Discord server well before going to an in-person event.

What Changes About The Venue?

- From one-way communication between talent and fans, to **ongoing two-way personal dialogue.**

- From planned releases and tours to **supporting artists and players** through the ups and downs of preparing, delivering, and celebrating their work.

- From living private lives to selectively and safely **role-playing with their fans.**

What New Revenue Is Unlocked?

- Proof of demand for new products, merch, and verch.

- New paid programming opportunities to incorporate into events.

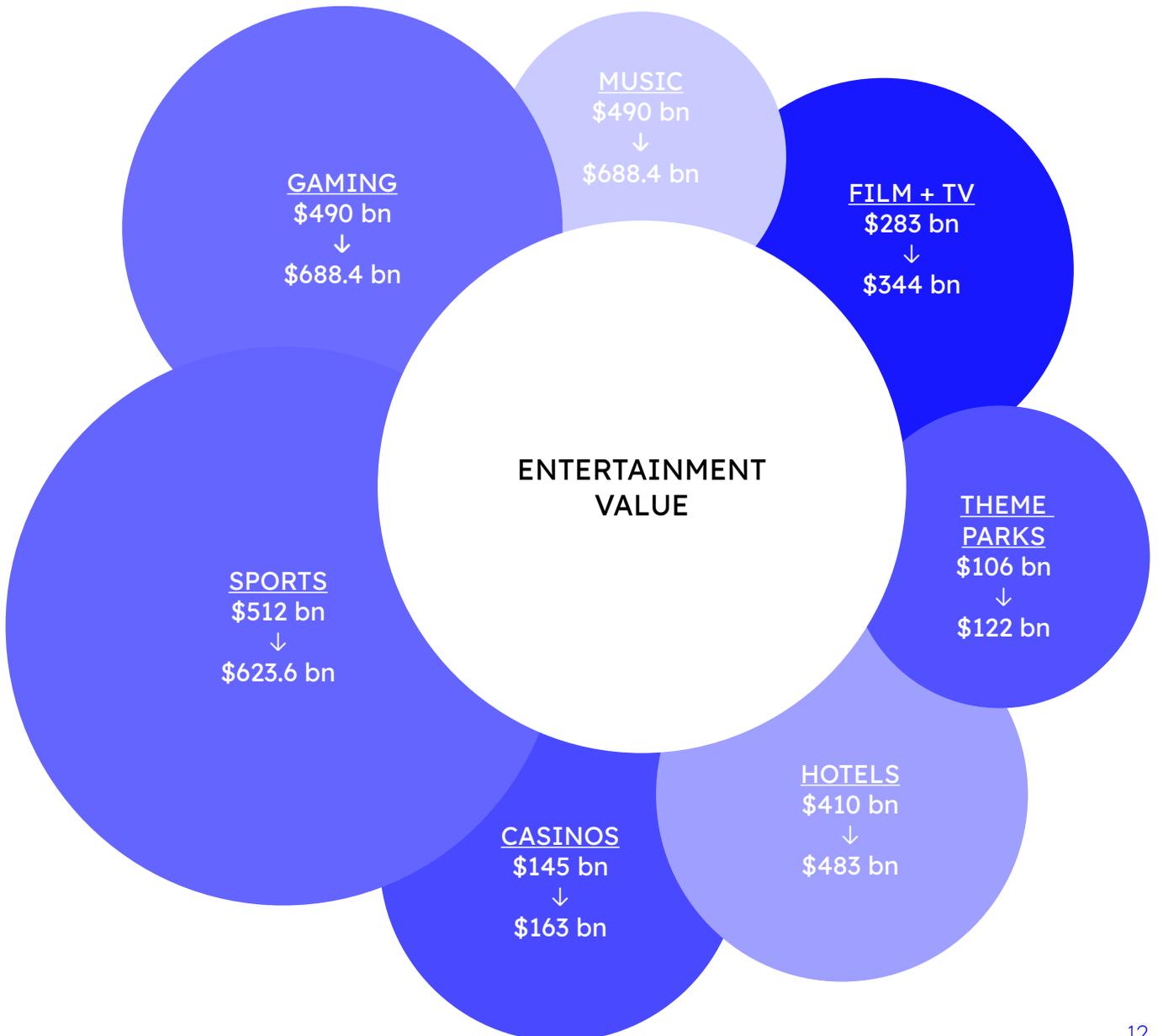- Increased opportunities for product placement and brand tie-ins.

Seamless on-site services are now table stakes

Fans expect no gaps or friction whatsoever in the experience for top-ticket events. Live entertainment is still full of moments that create anxiety for people: ticketing, parking, queueing, food and beverage purchase, availability of internet, and so forth. Every fan has pain points and a threshold they don't want to step over to get what they want. Cross that line, you've lost the fan.

Expanding the Playing Field for Venues

Venues of the future will provide monetization opportunities that go beyond ticket sales, concessions, and official merch, expanding what revenue can potentially be 'on the table' for developers, operators, and investors by 2027.

Sources: Sports, eSports, Music, Gaming, Casinos, Theme Parks

ENTERTAINMENT VALUE

GAMING
$490 bn
↓
$688.4 bn

MUSIC
$490 bn
↓
$688.4 bn

FILM + TV
$283 bn
↓
$344 bn

THEME PARKS
$106 bn
↓
$122 bn

SPORTS
$512 bn
↓
$623.6 bn

CASINOS
$145 bn
↓
$163 bn

HOTELS
$410 bn
↓
$483 bn

Rethinking the Design of Venues

A well-performed show or a nail-biting sports game will continue to be the core of every live event experience. Fan engagement requires a sense of togetherness, and we want event attendees to be centered on what's happening in the moment and sharing that experience together. That said, today's fan expectations are breaking legacy assumptions about what new physical and digital touchpoints will matter most in the future.

- Venues of the future should be **dynamic, tailorable platforms** for fans to immerse themselves in the worlds of their favorite artists and sports teams.
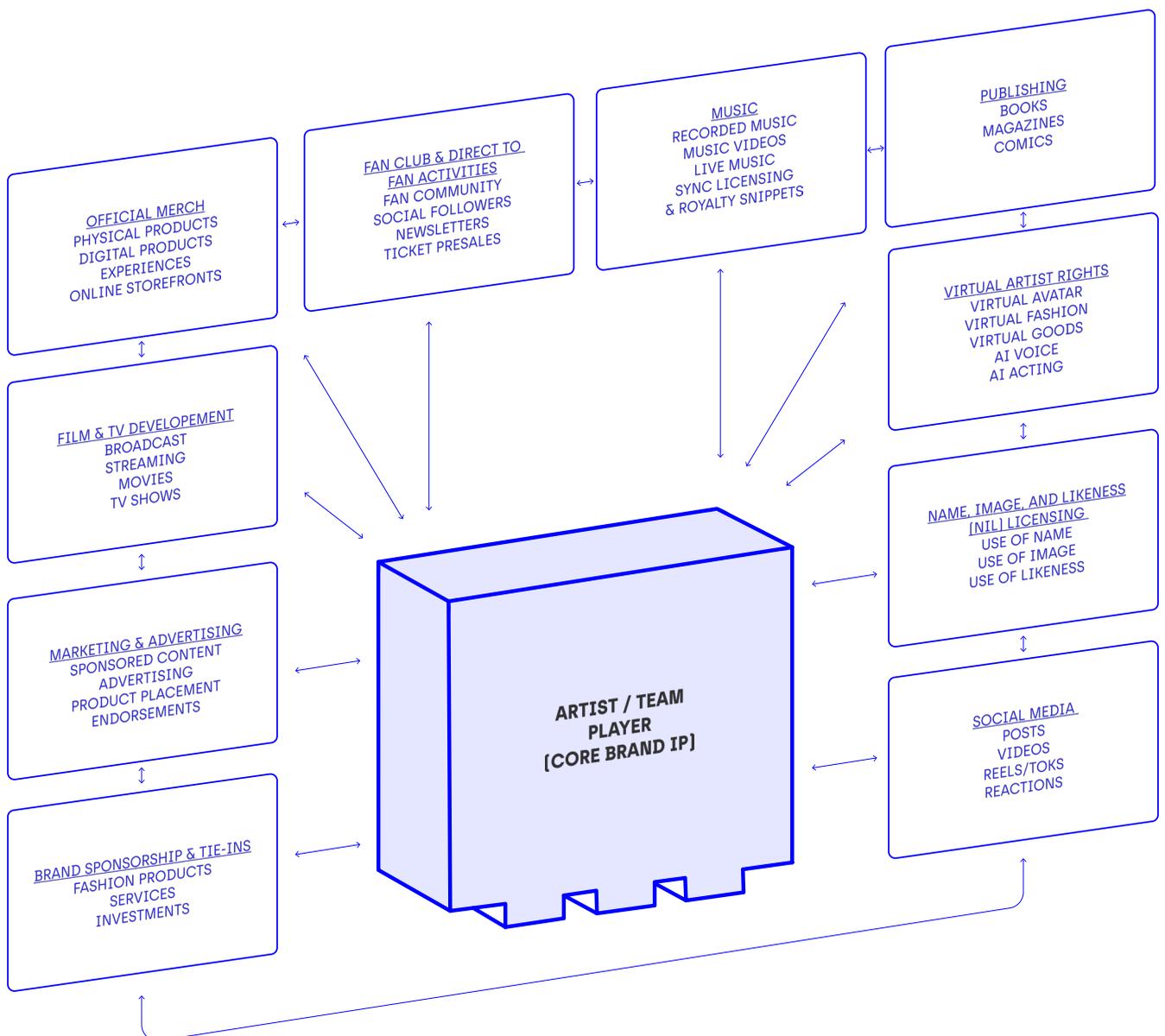
Dynamic venues merge artist and team IP seamlessly across its surfaces

In the future, fans can totally immerse themselves in artist-or team-related lore and experiences across every touchpoint of the venue. The venue becomes a seamless presentation of the artist or team's world, with the ability to incorporate fan dialogue and input live. This includes surfaces and service offerings that historically have not been possible to co-brand. Some artists have ideas to fill all these surfaces, while others may partner with fans or other brands

○ Tight integration between artist/team IP and venues leads to **more relevant touchpoints** for fan connection and revenue opportunities.

Mapping Brand IP for Teams, Artists, and Players

Artists and teams are taking a page from the Disney playbook and thoroughly mapping out IP usage across a universe of revenue-generating opportunities. Venues and promoters need to keep track of these artist/team IP opportunities, so they know where to plug them into customizable venue assets.

OFFICIAL MERCH
PHYSICAL PRODUCTS
DIGITAL PRODUCTS
EXPERIENCES
ONLINE STOREFRONTS

FAN CLUB & DIRECT TO FAN ACTIVITIES
FAN COMMUNITY
SOCIAL FOLLOWERS
NEWSLETTERS
TICKET PRESALES

MUSIC
RECORDED MUSIC
MUSIC VIDEOS
LIVE MUSIC
SYNC LICENSING
& ROYALTY SNIPPETS

PUBLISHING
BOOKS
MAGAZINES
COMICS

VIRTUAL ARTIST RIGHTS
VIRTUAL AVATAR
VIRTUAL FASHION
VIRTUAL GOODS
AI VOICE
AI ACTING

FILM & TV DEVELOPEMENT
BROADCAST
STREAMING
MOVIES
TV SHOWS

MARKETING & ADVERTISING
SPONSORED CONTENT
ADVERTISING
PRODUCT PLACEMENT
ENDORSEMENTS

BRAND SPONSORSHIP & TIE-INS
FASHION PRODUCTS
SERVICES
INVESTMENTS

ARTIST / TEAM PLAYER
[CORE BRAND IP]

NAME, IMAGE, AND LIKENESS [NIL] LICENSING
USE OF NAME
USE OF IMAGE
USE OF LIKENESS

SOCIAL MEDIA
POSTS
VIDEOS
REELS/TOKS
REACTIONS

Tailorable Venues Allow Fans To Control And Personalize Their Journey

Fans are able to control major aspects of how they take in the event, including what additional information might enrich their experience. They have access to "hidden menus" that help them mix and adjust what they want to experience, and the level of accessibility that may be required. While fans may plan how they'll engage with the event, the venue offers up personalized recommendations and "rabbit holes" into unique experiences that suit each fan's explicit and implicit preferences.

- Tailorable venues will behave more like game engines, **enabling unique surprises and unforgettable stories** for every fan.
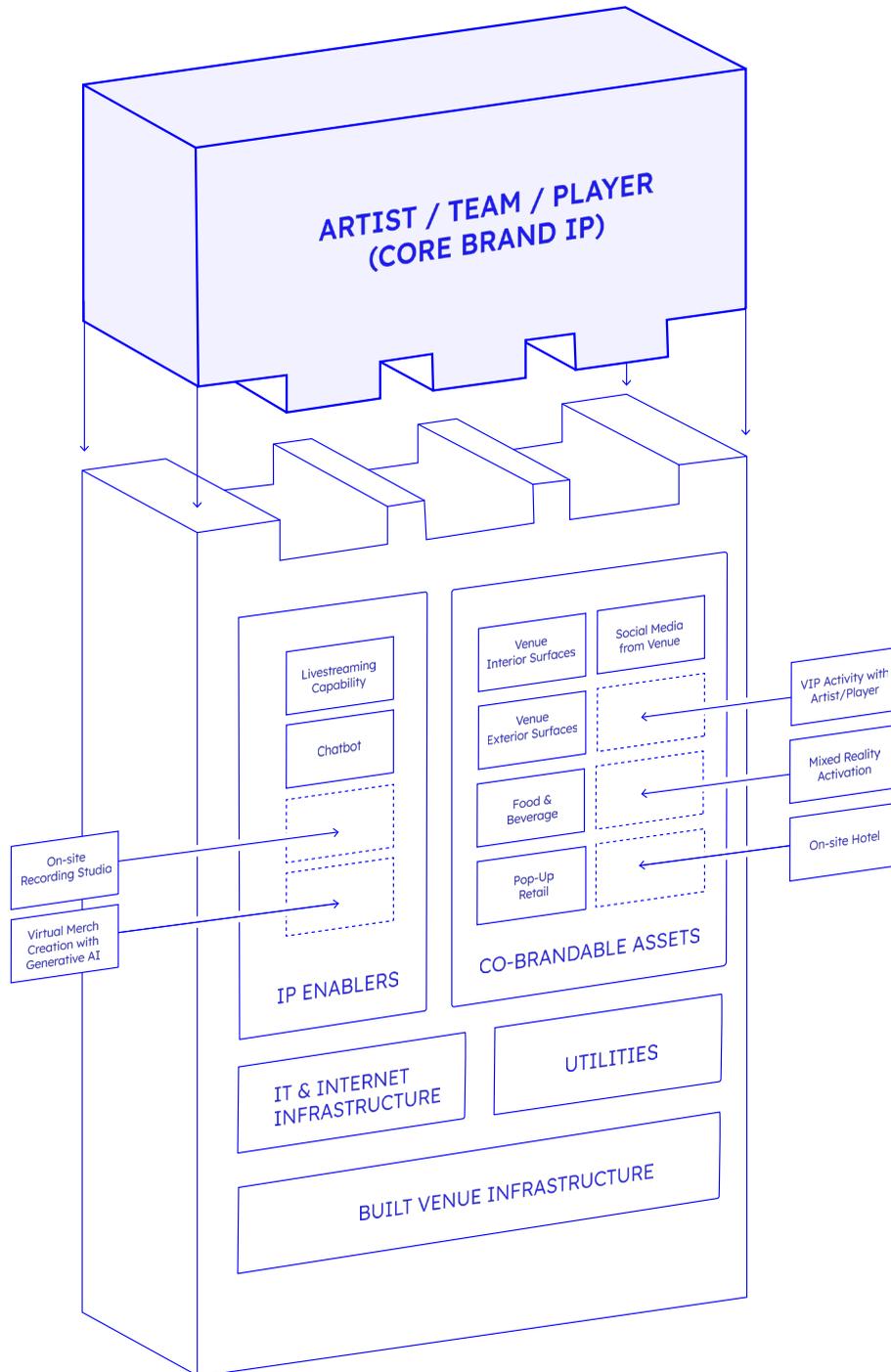
Venues Can Be The Preferred Platform For Ongoing Team And Artist Activities

When artists and sports teams plan tours and seasons, they can plug into an events platform that allows them to brainstorm fan-related content and revenue-generating touchpoints in a more expansive way. This can even include unique spaces for artist activation, so they're encouraged to create new works on site and collaborate with other artists.

- Venues of the future can serve as **a preferred platform for artists and teams** to deliver events beyond sports seasons and tours.

Plugging Artist/ Team IP into Brandable Venue Assets

Future venues will be designed with unique IP enablers for artists and teams, as well as a modular palette of co-brandable assets that can be incorporated into events.
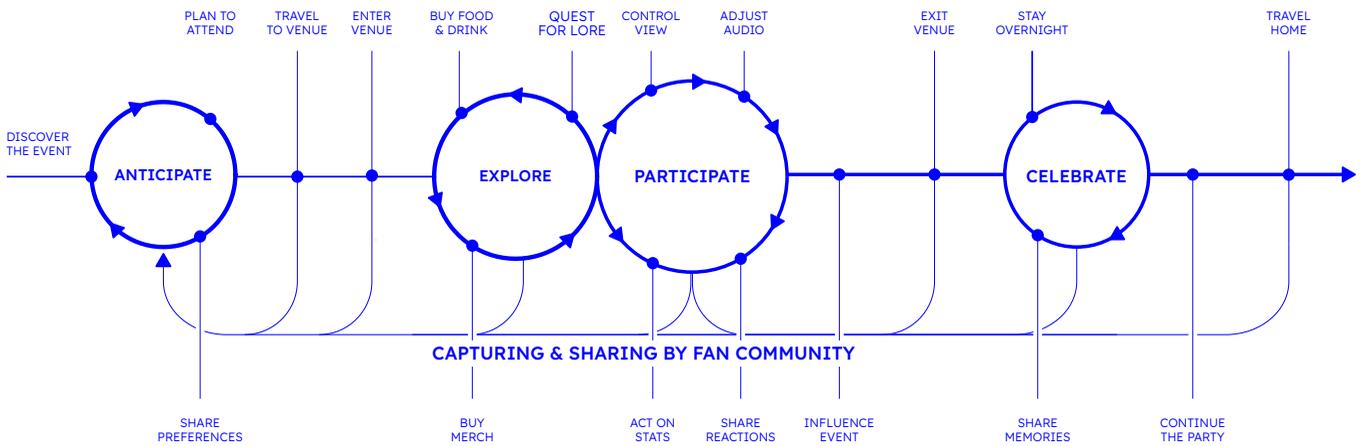

ARTIST / TEAM / PLAYER (CORE BRAND IP)

IP ENABLERS
- Livestreaming Capability
- Chatbot
- On-site Recording Studio
- Virtual Merch Creation with Generative AI

CO-BRANDABLE ASSETS
- Venue Interior Surfaces
- Social Media from Venue
- Venue Exterior Surfaces
- Food & Beverage
- Pop-Up Retail
- VIP Activity with Artist/Player
- Mixed Reality Activation
- On-site Hotel

IT & INTERNET INFRASTRUCTURE

UTILITIES

BUILT VENUE INFRASTRUCTURE

Venue Archetypes of the Future

Imagine it's 2026, and there's a new large sports venue that's just opened in a local neighborhood. You see there's a popular live act performing a concert, then a few home games with your local sports team. Let's explore what's happening at these events of the future, and how they deliver a dynamic, tailorable experience for fans.
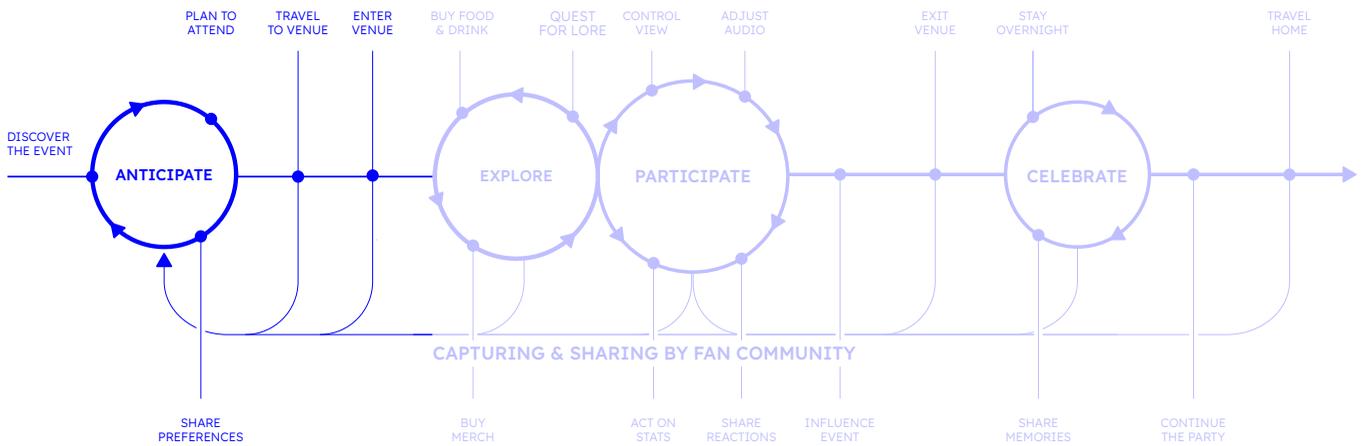
Venues Must Foster Continuous Fan Re-engagement

Fan communities are fueled by the continuous capture and sharing of unique experiences, far beyond individual transactions at a single tour stop or game. Due to this, every event-related touchpoint is a potential trigger for fan activation and long-term re-engagement.

DISCOVER THE EVENT

PLAN TO ATTEND · TRAVEL TO VENUE · ENTER VENUE

ANTICIPATE

BUY FOOD & DRINK · QUEST FOR LORE

EXPLORE

CONTROL VIEW · ADJUST AUDIO

PARTICIPATE

EXIT VENUE · STAY OVERNIGHT

CELEBRATE

TRAVEL HOME

CAPTURING & SHARING BY FAN COMMUNITY

SHARE PREFERENCES

BUY MERCH

ACT ON STATS · SHARE REACTIONS · INFLUENCE EVENT

SHARE MEMORIES · CONTINUE THE PARTY

Before the Event

Fans of the future will discover events directly through clubs and artists, and participate in a continuous flywheel of anticipatory activities building up to the event commute and venue entry.


PLAN TO ATTEND
TRAVEL TO VENUE
ENTER VENUE
BUY FOOD & DRINK
QUEST FOR LORE
CONTROL VIEW
ADJUST AUDIO
EXIT VENUE
STAY OVERNIGHT
TRAVEL HOME

DISCOVER THE EVENT

ANTICIPATE
EXPLORE
PARTICIPATE
CELEBRATE

CAPTURING & SHARING BY FAN COMMUNITY

SHARE PREFERENCES
BUY MERCH
ACT ON STATS
SHARE REACTIONS
INFLUENCE EVENT
SHARE MEMORIES
CONTINUE THE PARTY

Fan Club Venue Preview

Fans will learn about events from official and unofficial clubs, then sample preview content in the same digital environment that'll be used to deliver the event itself. Fans that participate will already be onboarded into the digital apps they'd need at the live event or to watch it online, before they buy a ticket.
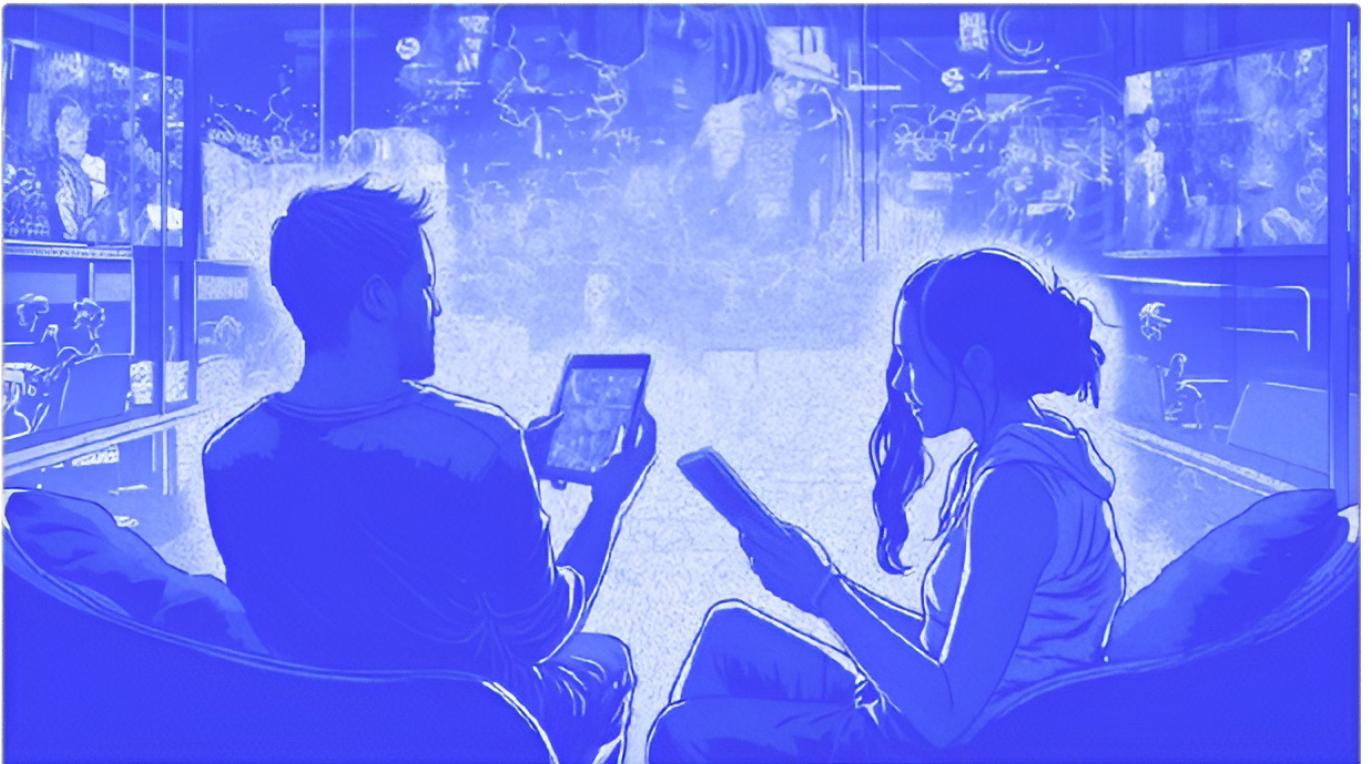
As Fan Expectations Evolve, So Will Ticketing Options

Fans are quick to sniff out inauthentic and irrelevant ticketing options, especially for top-tier events. What will they expect as part of ticketing in the future?

Greater Variety Of Venue And Seat Options:

Seats for live events at a primary venue, livestreams of the event at regional venues leveraging volumetric video and immersive audio/video, or tickets for purely digital delivery in virtual reality (VR). There should never be a bad seat on offer, including in your living room.

Multi-Day Packaged Experiences:

Pairing of exclusive performances of unreleased work, artist or team collaborations with brands, and 'meet and greet' opportunities before or after the primary ticketed event. When creating these types of packages, always consider uthenticity first. If it doesn't foster fandom, don't do it.

How Might Fans...

- Get first access to preview experiences of upcoming shows and games in a local venue?

- Set up their ideal preferences for experiencing a show or a game at a venue, before they even buy a ticket?

Contributing Forces:

- Music super-fans that engage with artists in five or more different ways spend **80% more money** on music. (Luminate Data)

- These super-fans are also willing to **pay for club membership** if it includes exclusive content, early access to tickets, and unique experiences. (Associations Now, FanCircles)

Design Principle:

- **Never start with an empty room.** Virtual event environments need to be where there is already an audience, no matter whether you start with Roblox, Fortnite, Rec Room, VR, or an experience hosted on an artist or team's website.

Plan with the Fan

Ticket purchase unlocks the ability to co-create aspects of what might happen at an upcoming event, tour, or sports season through games and activities. Based on content engagement and direct fan feedback, artists and sports teams can refine what they plan to deliver at the venue and hyper-personalize aspects of the event for those attending in person.

How Might Fans...

- Participate in games and activities with their favorite artist or team to reveal details of an upcoming event?

- Co-create and share ideas directly with artists and teams that will make an upcoming event exceed expectations?

Contributing Forces:

- **85% of superfans** believe that direct communication channels, such as fan Q&As or personalized messages, significantly bridge the gap between them and the artist. (FanCircles)

- Top artists are able to encourage **millions of people** to participate in games and activities to reveal exclusive information about new releases and events. (Rolling Stone)

Design Principle:

- **Everyone wins the game.** In any pre-event activity, strong AI-supported moderation is critical to make sure that fans treat each other, artists, and players with respect.

Trust Your AI Concierge

Every fan has a personal AI assistant at their fingertips, answering questions large and small and serving as their concierge to tap on-demand, exclusive services for the show. This includes pre-reserving food and beverage, receiving variable rewards such as better seats on game day and unique merch, and surfacing exclusive stats and insights.

How Might Fans...

- Be able to get anything that they want at an event, just by asking a question?

- Be surprised by variable rewards that help them immerse more deeply into an event?

Contributing Forces:

- Global retail spend through chatbots is predicted to grow to **$72 billion** by 2028. (Juniper Research)

- Chatbots are predicted to become the primary channel for customer service in a **1/4 of all businesses by 2027.** (Gartner)

Design Principle:

- **Always provide prompts.** Provide fans with keywords to access critical menus and functionality, and escalate to human intervention if major errors can't be addressed via the use of up-to-date large language models (LLMs) such as Open AI's Chat-GPT.

Start the Party in the AV

Venues partner with autonomous vehicle (AV) and ride sharing services and provide fans with exclusive content and experiences as part of the event commute. Pick up and drop off locations incorporate co-branded restaurant, bar, and retail experiences that are part of the itinerary for game day or a night out.

How Might Fans…

- Be immediately immersed in an artist's or team's world when they start their commute to the venue?

- Receive exclusive content and experiences that are only available through commuting via autonomous vehicles and ride-shares?

Contributing Forces:

- Many major American cities will have **on-demand robotaxi services available by 2026** with pay-per-use and subscription options. (McKinsey)

- Up to **17 million advanced AVs** are projected to be in use globally by 2030, assuming governments approve their use. (Oliver Wyman)

Design Principle:

- **Take time for transitions.** As fans step into and out of AVs, consider how they can best settle into the ride and prepare to exit into the venue. Those moments need to be flawlessly separated from artist- or team-related content during the ride.

Say Hello to the Venue

The outside of the venue recognizes fans and reacts to them, both as they're commuting to the event and when they're close up and planning to go inside. Artists and players can take over the venue exterior and its associated surfaces, creating personalized touchpoints for fan connection and breezing through venue security.

How Might Fans...

- Get quickly into a venue with no queue and no questions asked?

- Be recognized and celebrated by artists and sports team players as they enter a venue?
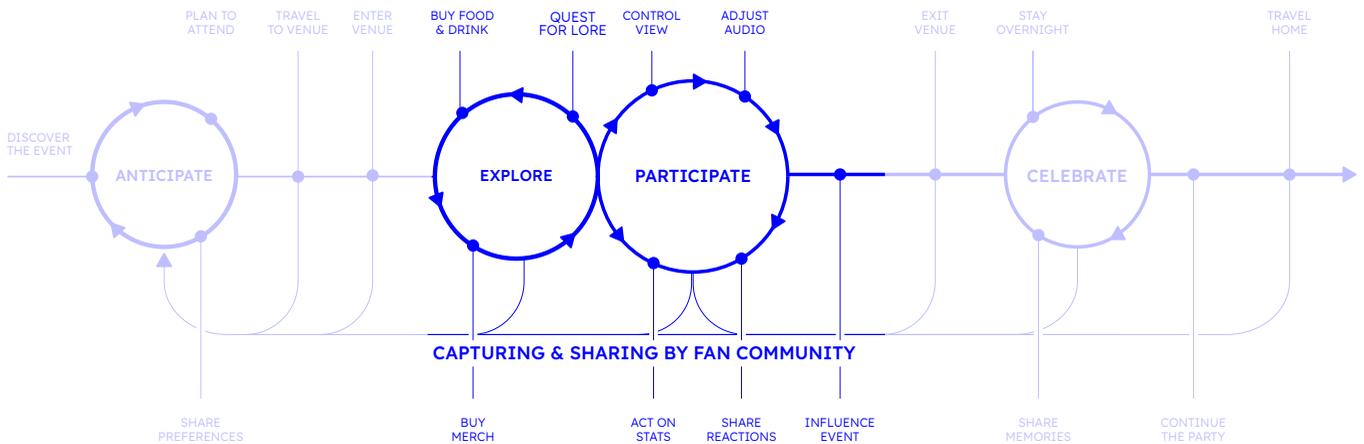
Contributing Forces:

- New facial-recognition systems let fans **upload a selfie in advance**, then enter a venue without stopping or needing a phone. (AP News)

- Breakthrough new venues such as MSG Sphere use large-scale **LED technology across exterior surfaces** to promote artist, team, and sponsor tie-ins—and delight fans by bringing aspects of the show outside the venue. (Variety)

Design Principle:

- **Personal info stays private.** Find subtle ways to signal to fans that they're important from afar, and save personally identifying information only for critical interactions up close such as making a payment or engaging in a service-related conversation with staff.

During the Event

When at the show or game, fans of the future will be fully immersed in the action, moving between exploration of the venue and shaping important details of the event experience directly with artists, team players, and attendees.

PLAN TO ATTEND   TRAVEL TO VENUE   ENTER VENUE   BUY FOOD & DRINK   QUEST FOR LORE   CONTROL VIEW   ADJUST AUDIO   EXIT VENUE   STAY OVERNIGHT   TRAVEL HOME

DISCOVER THE EVENT

ANTICIPATE   EXPLORE   PARTICIPATE   CELEBRATE

CAPTURING & SHARING BY FAN COMMUNITY

SHARE PREFERENCES   BUY MERCH   ACT ON STATS   SHARE REACTIONS   INFLUENCE EVENT   SHARE MEMORIES   CONTINUE THE PARTY

Skip the Concessions Wait

Fans take what they want from concessions and walk out with no line or payment required. The venue predicts fan food and beverage needs based on the flow of the event, and takes care of them with direct-to-seat delivery options, special deals, and exclusive food suggestions from the artist or team.

How Might Fans...

- Stay focused on the event instead of queuing to buy a variety of food and beverages?

- Plan food and beverage purchases in advance of lulls in a show or game?

Contributing Forces:

- Fans at stadium events in all countries said they would **spend at least 30% more**, on average, if wait times were cut in half. (Oracle)

- Cashless self-checkout enabled by Amazon's Just Walk Out and One technologies led to one new restaurant becoming the **immediate #1 seller** at Climate Pledge Arena. (QSR Magazine)

- Smaller venues are **earning less revenue on alcohol** with younger generations at events. (Billboard)

Design Principle:

- **They're already hungry.** Find proactive ways to communicate with fans about their food and beverage needs, even if it's before they take their seat. Hangry fans never make for great event experiences.

Participate in Side Quests

Fans are encouraged to discover "rabbit holes" outside and inside the venue, accepting quests and uncovering rare, unique loot and lore only available for those on premises. This includes physical and AR-based easter eggs, merch, virtual merchandise ("verch"), and special content created by artists and players.

How Might Fans...

- Receive exclusive surprises and rewards for exploring what a venue has to offer?

- Be rewarded for being near a venue, even if they don't have a paid ticket for an event?

Contributing Forces:

- By 2027, it's estimated that **267 million people** will be playing video games in the United States. (Statistia)

- AR-based games such as Pokemon Go command **33.25 minutes average usage** for iOS phone players, which is higher in engagement than Facebook, Instagram, or X. (Appinstitute)

Design Principle:

- **Quests must be accepted.** Use push notifications for fans to fully understand what a quest requires and opt into it. That way, they know what behaviors are acceptable while in the venue and how to maintain a safe environment while pursuing the quest goal.

Create Merch on Demand

Fan ideas and suggestions are translated in a matter of minutes into bespoke, on-demand merch and verch available only at the event. Fans who put their dollars down will get these unique items before they leave the show, and those who suggested the ideas can receive rewards in return.

How Might Fans...

- Own rare merch and verch that are tied to a specific event?

- Contribute ideas and content that are incorporated into exclusive merch at events—and be rewarded in return?

Contributing Forces:

- Even with centralization of merch sales online during the pandemic, the percentage of fans buying merchandise at concerts has **stayed steady at 21%.** (AtVenu)

- Approximately **75% of Gen Z fans** say they would likely purchase a fan token if there was a random chance for free merchandise, premium seats at live sporting events, or exclusive events with athletes. (Deloitte)

Design Principle:

- **Make merch last.** Even when using digital printing and generative AI for online asset production, make sure custom-made merch stands the test of time.

Choose Your Camera View

Fans express preferences for what view they want to prioritize while watching an event, including being directly on the stage or field of play. Artificial intelligence then sifts through footage in real time from hundreds of cameras, surfacing those viewpoints to the appropriate device screens.

AI Is Your New Event Director

Fans use a wide variety of devices to engage with sports and live music. With the addition of spatial computing to the mix, production choices need to be streamlined in a way that enables digital and XR use cases alongside in-venue projection without heavily driving up cost of production. AI can help with this processing, as long as it takes some important principles into account.

For example, when using VR headsets fans expect to be in the game environment itself and not be limited by camera placement. Digital twinning makes sense for sports viewing in this context, as the fan could flip between broadcast views and being directly on the field for the replay.

Fans also want the nuance of tiny sensory details from their favorite venues: the echo of a crowd's roar in a specific space, the rev of an engine, and the smell of being there. Looking for these sensory 'nooks' in the live environment and incorporating them into AI-curated content can be a unique differentiator for specific sports and iconic venues.

How Might Fans…

- Fluidly shift between preferred views of what's happening live at an in-person event, with no manual effort?

- Experience sensory details during an event that only an artist or player would know?

Contributing Forces:

- 37% of Generation Z sports fans want the ability to **choose different camera angles** as part of their sports viewing experience. (Deloitte)

- 41% of global sports fans are watching sporting events via streaming services on one device, with half of them **simultaneously having their television on at the same time.** (Nielsen)

Design Principle:

- **Reduce the noise.** Fans may want access to more visual information and camera views, but there's a limit of what they can take in before getting overwhelmed. Help fans pick from smart preferences, and use AI to curate visual information ruthlessly.

Dial in Your Audio Mix

Fans have complete control over the audio content they experience at an event, from music volume and EQ to localization of commentary. They don't feel like they're sitting in front of loudspeakers, they're inside the speaker and fully immersed in the experience.

How Might Fans...

- O Experience studio-quality sound that captures every detail of the event experience and protects their hearing?

- O Be able to control what layers of audio commentary will create the most relevant, immersive experience?

Contributing Forces:

- O Technologies such as beamforming audio and **streaming soundboard audio directly to fans** will become ubiquitous. (HOLOPLOT, VenuesNow)

- O Use of generative AI, live translation, and voice cloning will allow for **fully multilingual dubbing and captioning options** for most sporting events. (NBC)

Design Principle:

- O **Reduce hearing fatigue.** Loudness hurts fans. Let them know what levels are safest for them based on sustained exposure.

Stay on Top of Stats

Fans curate and overlay stats, song lyrics, and other forms of official data that enrich what's happening in the event. Fans can also choose to incorporate information related to what's happening outside of the event, if it potentially influences what may happen later in the sports season or tour.

How Might Fans...

- Augment their event experience with useful and entertaining contextual data?

- Quickly hide additional data when they want to immerse themselves in the action?

Contributing Forces:

- 47% of Generation Z sports fans want access to **real-time statistics and analytics** while watching games. (Deloitte)

- 73 million Americans plan to wager on the 2023 NFL season, a nearly **60% increase from last season**. (CNBC)

- Sportsbook facilities are now being **incorporated directly into the design of stadiums.** (Washington Post)

Design Principle:

- **Label what's official.** Since spot betting will continue to be a norm for live sporting events, make it 100% clear to fans what venue-provided data is officially verified by the team.

Influence the Action

Fans can take over and change different parts of the event environment, causing a response from artists or players that ends up being scripted into the event itself. This can happen both in virtual environments, such as AR stadium takeovers, as well as the use of apps and other digital technologies that serve as the "new lighter" for call and response with an artist.

How might fans…

- Express their passion for an artist, team, or player in a way that becomes part of the game or show?

- Use their actions en masse to demonstrably influence the energy of the audience or the outcome of an event?

Contributing forces:

- The Minnesota Twins reported **engagement time of more than 25 minutes per fan** with their augmented reality (AR) app—exceeding the average time of on-field action in a typical baseball game by 7 minutes. (Fast Company)

- Millions of fans are live streaming top concerts nightly, which makes **changes in the set list surprising** for highly engaged fans who watched TikTok and YouTube clips in advance. (Vox)

Design principle:

- **No wasted effort.** Fans should know up front how their effort will translate into a potential response, and whether the reward will be received by everyone in the audience or by spotlighting specific fans for praise.

Cosplay for the Crowd

Fans are provided with the ingredients to role play as artists or team players during the event. They can take on virtual avatars, reenact important moments that happened during the event, and create wholly new moments they wish had happened. Fan creations are then shared during the event and incorporated into lulls in the action.

How Might Fans...

- Share their love of an artist or team with event participants?

- Capture, annotate, and share important moments specifically with other fans in the venue?
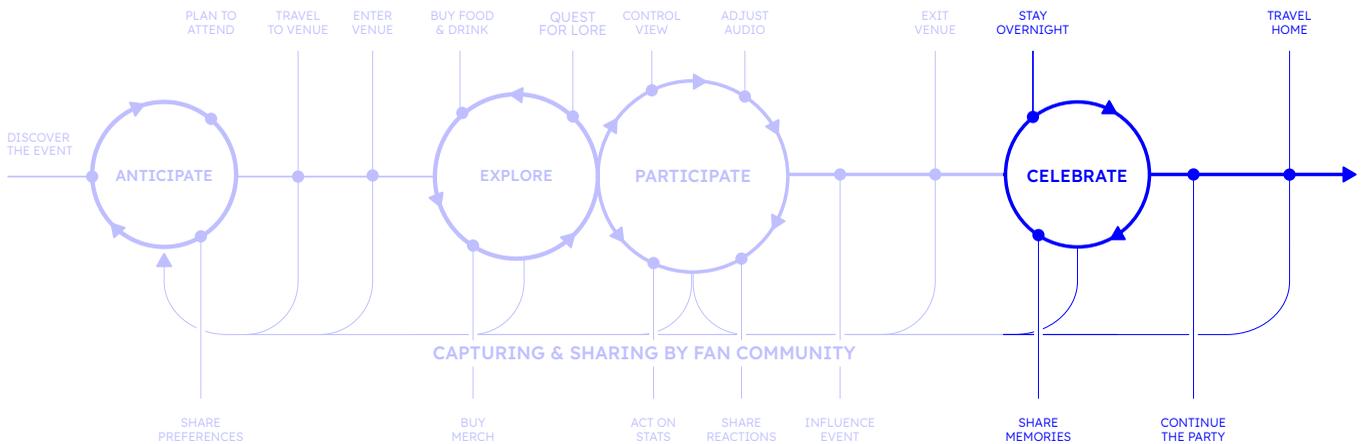
Contributing Forces:

- **57% of TikTok users view sports content on the platform weekly**, and want to see live streams, videos featuring their favorite athlete or team, behind-the-scenes videos, comedic moments, and reenactments of sports moments. (TikTok)

- Young fans are already spending their time in Web3 spaces — sometimes even while they're sitting in stadiums watching a live match — and **recreating the world of the team on platforms like Roblox**. (Liga Deportiva Alajuelense)

- Recent experiments in fan-controlled football led to 230,000 registered fans, over 2.4 million live viewers per week, and sales of over 20,000 NFTs with an **average revenue per user of nearly $1,000.** (Harvard Business Review)

Design Principle:

- **Celebrate the effort.** Fans are being vulnerable when they share their deep love of a musical artist or team player publicly. Reward them for stepping up and out.

After the Event

For fans of the future, there's no end to celebrating their favorite team, player, or artist after a show or game. New experiences allow for continued immersion in artist/team player IP, both at the venue, around the venue, and online.

PLAN TO
ATTEND

TRAVEL
TO VENUE

ENTER
VENUE

BUY FOOD
& DRINK

QUEST
FOR LORE

CONTROL
VIEW

ADJUST
AUDIO

EXIT
VENUE

STAY
OVERNIGHT

TRAVEL
HOME

DISCOVER
THE EVENT

ANTICIPATE

EXPLORE

PARTICIPATE

CELEBRATE

CAPTURING & SHARING BY FAN COMMUNITY

SHARE
PREFERENCES

BUY
MERCH

ACT ON
STATS

SHARE
REACTIONS

INFLUENCE
EVENT

SHARE
MEMORIES

CONTINUE
THE PARTY

Stay in Fan World

Staying overnight at the venue provides a deeper level of immersion for fans, with on-site hotel, restaurant, and retail touchpoints directly curated by artists or players. Fans can aspire to live a little bit like their favorite artists or players, with opportunities to rub elbows with them at exclusive pre- or post-event activities.

New venues such as TSX in Town Square are being designed to **directly incorporate co-branding from artists and sponsors** into hotels, restaurants, bars and clubs, retail, and performance and recording spaces.

How Might Fans...

- Experience an all-inclusive getaway to an event that's been designed by their favorite artist or player?

- Be delighted by the hospitality that their favorite artists or players enjoy most?

Contributing Forces:

- Name, image, and likeness (NIL) deals for NCAA college players are adding up to over **$1.17 billion** in yearly revenue, which is only projected to increase. (Marketplace)

- NIL deals are most often associated with **apparel/footwear, local and national restaurants, social media endorsement, and virtual merch (NFTs).** (Sports Business Journal)

Design Principle:

- **The ticket is the key.** Streamline how fans can best access every part of their stay with a single ticket, rather than a fragmented mix across different service providers.

Suggest What's Next

The show or game doesn't have to end yet. Fans can discover and participate in post-event activities that continue their love for an artist or team, including official clubs on site and tailgating with hospitality provided by local businesses. Concierge offers can be personalized to groups of fans, and distributed in a way that load-balances demand for on-site facilities as well as local restaurants and bars.

How Might Fans...

- Celebrate team success (or forget a failure) with a like-minded community, before they head home?

- Affordably unwind from an event before commuting home?

Contributing Forces:

- Exclusive members-only experiences such as the Cowboys Club at AT&T Stadium provide the opportunity for **fans to rub shoulders directly with players and staff**, both during game days and the off-season. (Journey)

- 44% of US sports fans would pay a premium to have **meals from outside of the stadium** delivered to them. (Oracle)

Design Principle:

- **Safety above all else.** Consider the fan's mood, what activities and services they took part in while at the event, and the outcome of the event itself. In many situations, the best recommendation will be to help them return home.

Relive the Best Moments

Fans have immediate access to immersive highlights from the event, and can re-watch portions of the event from different perspectives to catch new details. All of this can be easily shared with other fans planning to attend the next game or show, including special moments from social media selected by the artist or team.

How Might Fans...

- Re-experience their concert, game, or show experience from different perspectives?

- Share their favorite moments from an event experience in exclusive new ways?

Contributing Forces:

- Harry Styles' most recent tour had more than **7.2 billion views of hashtagged content** on TikTok, including videos from the show, fans trying to get tickets, planning outfits, waiting to buy merch, and more. (Nylon)

- Many fans expect they'll be able to **view concert livestreams and video clips in advance** of attending an event "as a form of homework and engagement." (Vox)

Design Principle:

- **Curate top moments.** While every fan may have their own favorite moments as part of an event experience, the event producer should prioritize which support their brand vision.

Fans Are Leveling Up, So Should Venues

Venues that thrive will need to re-skin and continually level up to exceed fan expectations. At the same time, there's a risk with any new technologies of overpromising and under-delivering. So venues and IP owners need to start smart.

Email us at hello@journey.world

Reach out to Journey to help you with

Creating an Experience Strategy

We can help venue and IP owners to scrape the universe of options, build a roadmap, and focus on what is executable for in-person and digital next-generation event experiences.

Executing Pilot Experiences

We love to right-size and test new event experiences, helping our clients prove impact before a full scale-out. We deeply understand the constraints of leading-edge technologies discussed in this white paper, and where they can be pushed.

Designing and Producing Venues

We've helped create and refresh small and large-scale venues from concept to production, both in-person and online. We'd be happy to share some of these in-depth case studies directly with you.

CONTRIBUTORS

JOURNEY
DAVID SHERWIN