

# TRANSFORM YOUR VENUE INTO A MEDIA PLATFORM



sports  
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# DOING MORE WITH MEDIA

Digital media changes how we interact with the world. Today, sports venues must intertwine digital media with so many aspects of the live sports experience; fans may use AR installations to take a selfie, may crave real-time stats, or may even watch custom replays on their phone. They may play interactive games on the big screen, watch a broadcast while waiting in line, or may use screens to find their way around. LA Rams & SoFi Stadium CTO, Skarpi Hedinson, believes that “Media, and the expectations of media, are drastically changing the live experience” for venues. Because of these demands, venues will need to evolve to become more like media platforms.

What does it mean for a venue to be a media platform? At its core, it’s about rethinking how media changes fan experience, and the way a venue business is run. The venue as a media platform makes full use of the many screens embedded throughout the venue to engage fans, and to create new sponsorship inventory, fan experiences and data. The venue as a media platform impacts every aspect of the live sports experience.

The consequences of rethinking the purpose of a venue are broad and far-reaching; from how sports experiences are designed, to how sponsors and advertising partners understand the value of promoting sport.

## What is Driving this Change? Fan Expectations Around Media are Changing.

Content consumption habits are changing and venues must adapt to accommodate this shift.

- **Fans expect more when they watch sports.**

93% of sports fans under 25 say they use a second screen while watching TV.<sup>1</sup>



- **Watching isn’t enough; fans want to create.**

74% of millennials say user-generated content has a greater impact on them than professional photos. With such striking stats, brands cannot afford to ignore UGC.<sup>2</sup>



- **Fans want to interact with media.**

30% of US sports fans now stream live sports on their smartphones or tablets, and 80% use the Internet when watching sports to enhance their experience.<sup>3</sup>





# MEDIA CHANGES THE BUSINESS MODEL

Connected technologies created the possibility of a 'Smart Venue' where technology transforms a physical building into a dynamic, interactive ecosystem. Innovations like digital ticketing, interactive scoreboards and automated light shows are quickly becoming standard practice. The next evolution of 'smart' may have more to do with the way a venue functions as a platform for media consumption and distribution. Venue screens and the smartphone have ushered in a whole new era of mediated sport at a venue, and the industry is only just beginning to figure out what to do with all the screens available in a venue.

Throughout the history of modern live sports, scoreboards have been useful, but secondary to the action. Scoreboards gave fans information—the score, the inning, the time remaining—but fans were expected to focus on the live-competition right in front of them. That's why they bought the ticket, right?

But technology evolved quickly, and screens have become our main mode of global media

consumption. Screens, both at home and at venues, got bigger and cheaper.

And then screens got smaller. We stuffed them into our pockets, and used them to watch anything and everything, including sports. And what's more, we could tap them and interact. The smartphone not only changed how we watch sports at home, but how we interact at a venue.

Today, there are screens all over the venue. From the screens in the concourse, scoreboards in every corner, screens at the concessions line, ribbon screens on section fascia, dynamic menus in luxury boxes—there are digital screens and boards all throughout a modern venue. All of these screens represent an opportunity for venue operators to operate differently, creating new fan experiences and sales inventory. As Tinus LeRoux, CEO of Fancam said, "We need to classify the different types of screens and break it down further and personalize for each type of experience."



## More Opportunities for More Media

The Los Angeles Dodgers installed their brand-new Diamond Vision screen in Dodger Stadium in **1980**

it was 875 sq feet in size<sup>4</sup>

When SoFi Stadium opens in 2020, it will have over **2,500 4K HD Screens<sup>5</sup>**

By 2023, mobile ticketing will reach

**1.9B users**

representing a majority of all tickets sold. The smartphone will be an important part of the fan experience from the moment they enter the venue.<sup>6</sup>

# REIMAGINING EXPERIENCE, SPONSORSHIP, DATA, AND EVENTS

## Fan Experiences Become More Personalized and Memorable

The influx of screens in venues creates new opportunities for fan experience. What started as the location for replays, scores, and menus has become a more interactive and contextual engagement platform. According to John Downie, VP of Experience at Advent, the goal is to create digital media touch-points that are active, not passive. At the earliest, and most

base level, content producers discovered they could turn the camera away from the action and on to the fans, leading to “kiss cams” and “dance competitions.” Shortly thereafter, shell games, sound meters and picture puzzles became mainstays of the sports screen experience.

**But a new wave of technologies and content producers are re-imagining what engagement with screens could be at a venue. This is happening on both the big screens throughout the bowl, as well as on concourse screens and by way of our smartphones.**

## Media Creates More Sponsorship Inventory For Sales Teams

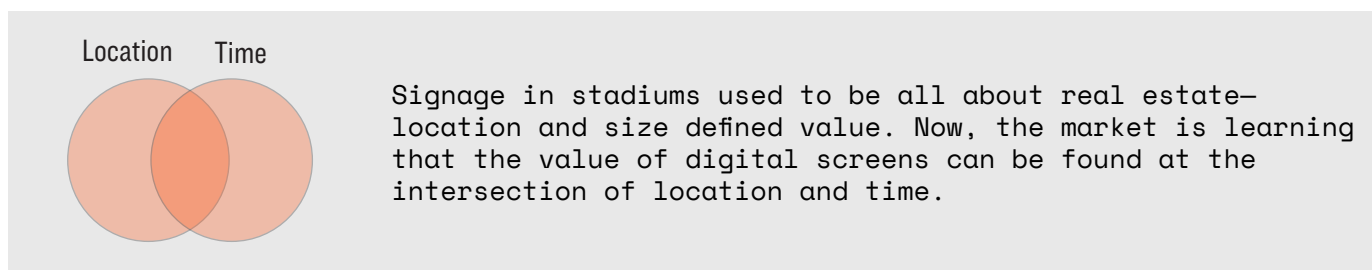
Screens throughout a venue also mean more inventory for the venue sales teams. Where once the industry was dominated by static signage, a host of new formats are quite literally changing the game. According to Andrew DeWitt, Digital Network Director at Amalie Arena, selling a homepage takeover or logo overlay is not as valuable as it used to be. Fans don't want to be marketed to, they want less invasive, more immersive experiences

at venues. At the end of the day, it's about evolving sponsor messaging to be more contextually relevant and meaningful for fans.

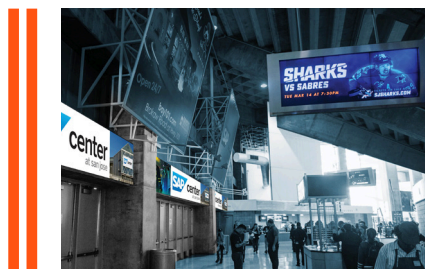
For example, with the Dallas Cowboys and rideshare partner Uber, it made more sense to time their messaging at AT&T Stadium after the game was over, as fans were making their way out of the venue. Ads were run on Concourse Screens, to give meaningful

contextual information for the fan that is thinking about how to get home. This combination of real estate and time is an example of how technology is creating new inventory on digital screens in venues.

**The modern venue sales team needs to adapt to the improved, and valued capabilities of the mediated venue.**



## Brand Domination with BMW and the San Jose Sharks



In collaboration with BMW, the San Jose Sharks and the SAP Center created a momentary “full venue” media takeover. The BMW messaging was coordinated, to drive brand awareness and to showcase the synchronization of the media throughout the venue. Part of the experience was to drive fans to a virtual car dealership in the arena, that featured a rotation of physical cars on display.

## More Data

How well do we know who is in a venue? And what's more, do we really know what these people are doing while they are there?

As digital media penetrates all corners of the venue, and as fans continue to interact through their phones, in-venue messaging is no longer a one-way street with sports properties communicating to fans. Today it is a two-way communication model, with fans willingly contributing data about their interests and behaviors.

**In-venue media unlocks the ability to know more about fans and create meaningful, contextually relevant service and messaging.**

“Brands are thinking about context; they are trying to solve a problem. It’s not just pushing messaging on consumers, they’re trying to be part of the experience and improve it.”

**- Sebastian Oddo**  
**Senior Vice President of Innovation, Octagon**

## The Venue as Theater for Events and Beyond

Watch parties and events where the screen is the main attraction provide some of the most compelling examples of how the Smart Venue is morphing into a media platform. This trend is part of a broader industry shift in building mixed-use districts around venues to create a 365-day experience beyond just gameday.

Examples of this kind of activation include watch parties, where a game is shown on the Big Screen to an audience, and esports events. In both cases, fans will pay to come watch the event together on a big screen. This provides an additional revenue pillar of organizations inside the venue and has especially promoted the development of exterior displays to support large-scale watch parties. Here are some examples of successful watch parties:



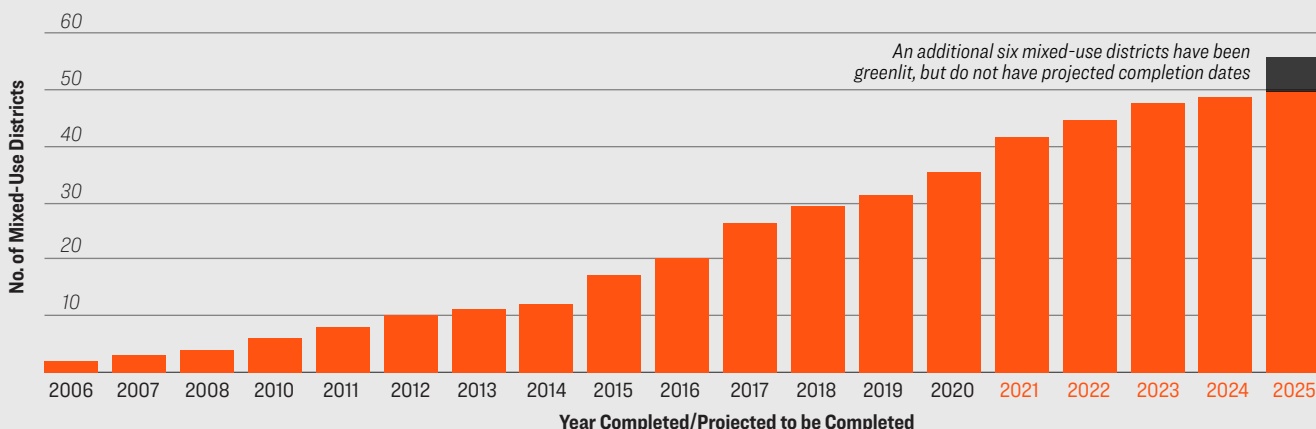
**Venue:** Enterprise Center  
**Date:** June 2019  
**Event:** NHL Playoffs  
**Attendance:** 18,000  
**Ticket Price:** \$20



**Venue:** Avaya Stadium  
**Date:** March 2019  
**Event:** FIFA Women's World Cup  
**Attendance:** 15,000  
**Ticket Price:** Free

## The Stage Gets Bigger: Sports and Entertainment Districts are Growing Rapidly<sup>7</sup>

Professional sports organizations are designing mixed-use districts that create a destination beyond gameday. The number of estimated districts housing professional sports teams will double between 2018 and 2024



# MAXIMIZING YOUR VENUE MEDIA REQUIRES INTEGRATED PARTNERSHIPS

## Screens Alone Don't Create A Media Platform, You Need Strategy

The proliferation of screens at venues creates broad and significant opportunities. Execution on these opportunities remains a hurdle when operating in traditional silos. It is not enough to simply install screens in your venue, sports properties need a strategy and workflow that consider technology infrastructure, talent, and creative integration.

## Taking the Next Step

Embracing this opportunity requires holistic thinking—understanding that the media in your venue is not a set of point solutions, but an integrated collection of technologies that make your screens a true media platform.



“Successfully deploying technology takes understanding that you can't rely on a set of point solutions anymore, you need to think and design holistically, with the whole of fan experience in mind.”

- **Skarpi Hedinsson**  
CTO, SoFi Stadium & Hollywood Park

# THE VENUE AS A MEDIA PLATFORM WON'T BUILD ITSELF

Preparing for this trend demands a strategic shift in leadership, technology, partnerships, and staffing.

## 1. Visionary Leadership

Innovation starts at the top, with leadership that allows its teams to experiment with technology. These leaders greenlight initiatives with open criteria for success, and they hire dedicated fan experience and entertainment executives who execute on the organization's capacity to dream.

## 2. Technology Applicability Across Multiple Teams

As teams and properties embrace a holistic view of technology and the way it supports their entire ecosystem, technology vendors are under greater pressure to show that their technology will benefit multiple teams and not only benefit a small slice of the client organization.

“We started to really see the lines between the departments we had in the front office were being blurred by technology digital media and innovation.”

- **Matt Gardner**  
**VP Digital Media & Emerging Technology, St. Louis Blues**

## 3. Strategy for Technology Scale and Flexibility

Innovation moves quickly. It is impossible to predict the next major media trend, or how fans will want to engage with media. The most immediate way to prepare for the future is to stay agile with technology. This means partnering with the right technology companies to help you deploy flexible, comprehensive systems that can adapt to whatever comes down the road with media trends.

“We need to think about how designing the arena for the fan of today can be changed by what the fan 10 years from now wants. It is impossible to predict everything, but what we do know is that we need our partners to be scalable.”

- **Aaron LeValley**  
**Senior Vice President, LA Kings**

## 4. Partnerships that Incorporate a Content Distribution Strategy

Media in a venue, from the smallest to the largest screen, is an opportunity for communications. The sales teams driving that content need to work hand in hand with creatives to take advantage of this opportunity. Operationally, this means making sure your sales teams are ready to work with the graphic designers, animators, interaction designers, video editors, and sound designers to create the most compelling and engaging content for fans and for sponsors.

“We try to be as dynamic as possible, in-venue advertising is constantly changing and evolving; both the Cowboys as an organization and our partners have to be agile. We need to learn new ways to capitalize on relevant moments throughout a gameday. We, like everyone else, are going up against the challenge of time.”

- **Michelle Gulino**  
**Corporate Partnership Marketing Manager, Dallas Cowboys**

## Your fans are changing. Your sponsors are changing. Media is changing. Are you ready to take the next step?

Comprehensive, holistic technology systems require the right kind of teams and strategists to maximize their value. As we've shown in this report, the venue as media platform is full of opportunity for more experiences for fans, more inventory for sales teams, and more data to drive decisions. The opportunity presented by the venue as a media platform comes from creative solutions to content; is your organization ready to take the next step forward?

## Study Methodology

This custom study was commissioned by Cisco then written and produced by Sports Innovation Lab. The framework and recommendations in this report are supported by Sports Innovation Lab's independent research and market data.

The Sports Innovation Lab interviewed 20 experts from the sports industry including sports properties, venue operators, technology vendors, architects, agencies and brands. In addition to qualitative interviews, a review of the extant literature about the trajectory of media in sports venues was also conducted.

Additional supporting data inputs were provided by the Sports Innovation Lab's proprietary natural language research platform. This platform ingests and processes texts from the sports industry, then runs exhaustive text analysis based on analyst-defined taxonomies.

## Organizations Interviewed

Advent	MVP Interactive
Amalie Arena	Octagon
Coca-Cola	Pico Get Personal
Dallas Cowboys	Reely.ai
Fancam	St. Louis Blues
HKS	Venuetize
LA Kings	WaitTime
LA Rams	Xperiel



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## Endnotes

1. GlobalWebIndex Sports Fan Survey Q2, 2017
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3. Google/Ipsos Connect Sports Viewing Survey, 2017
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5. BroadBand Technology Report, 2019
6. Juniper Research, 2019
7. Sports Innovation Lab, 2019