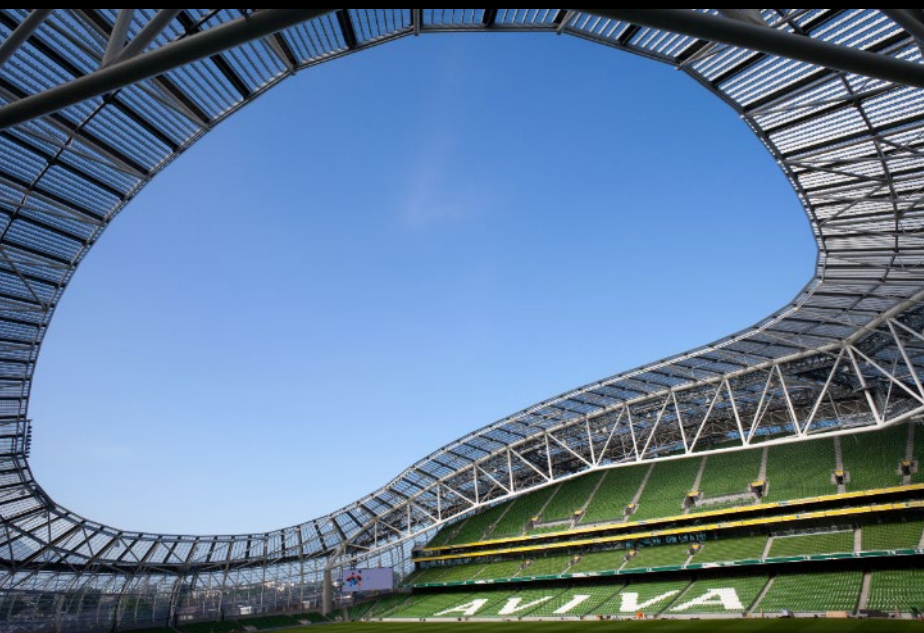




Spectators' Experience Global Survey

Football Edition

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Introduction



Last 20 years of digitalization changed our lives. The spread of mobile phones and smart phones changed our lifestyles, our shopping behavior, and the way we communicate.

Digitalization made an impact on the sports spectators' experience. People have become used to searching on the web to obtain information about the teams they support, their favorite players, and to purchase tickets. Similarly, game broadcasting shifted from terrestrial to online broadcasting, allowing individuals to easily check live score and game results in real time.

With these changes, sports fans now have different expectations from simply watching the game itself when they are present at the game site.

Moreover, individuals attending sporting events each come with a different purpose in mind. It also involves a wide range of stakeholders taking part to plan each event.

The sporting business is currently drawing great interest, and many companies are working to improve the services they provide. We believe by joining these individual efforts and combined with analysis on spectator experiences will lead to a higher level of customer experience.

Deloitte Tohmatsu Group is one of Japan's largest professional firms and retains many business advisors. Since its inception in April 2015, the Sports Business Group has been active in publishing "J-League Management Cup."

This report was produced with the conviction that the new perspective provides on the sports business market will lead to business revitalization.

Go Miyashita

Executive Officer, Customer & Marketing Division Leader
Deloitte Tohmatsu Consulting LLC

Seiji Morimatsu

Senior Manager/ Sports x Customer Experience Business Lead,
Customer Experience Designer Customer & Marketing Division
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Overview and Objectives

There is more to sports than just the game itself. Sports in Japan can become more exciting. Spectator Experience is the key to establishing sports as part of Japan's culture.

Voice of an indoor spectator

One day in 2018, I went to see a particular game. The streets leading up to the stadium had very few signs to guide me. Even upon arriving at the stadium, there was no signs or banners, which made me doubt if I had came to the right place.

There was a "shoes off" sign outside an empty arena, where eating and drinking were forbidden. The post-match autograph session was hastily cut off for arena administrators' convenience. It was difficult to find the results of the game online. This wasn't the first time I found myself wondering if this was the fate of all minor-league sports.

On the other hand, major sports, such as baseball and soccer, draw large crowds of enthusiastic fans and supporters. They are able to enjoy food at the stadium while watching great performances. But many also get tired of packed stadiums and are not willing to return for future games.

"The trip is not over until you get home"

This is an old saying teachers have taught us. It was meant to remind us to be

careful until we get home, but for me it presents my excitement lasting all the way home, until long after the match is over. I have seen a poster in the countryside that said, "your holiday begins the moment you start thinking about it". I think this also probably be true to watching sports as well.

Customer Experience team specializes in strategic planning and improvement for customer Experience. The team is housed under the Customer Relationship Management group in Deloitte Tohmatsu Consulting (DTC). We believe that with our consulting knowledge and experience, we can help our clients to improve the "spectator experience".

In short, we want to improve a spectator's experience from the moment one finds out about the game to the moment the spectator returns home after the game. People enjoys watching sports in different ways, and we want to help cement these ways as part of Japan's culture.

We must not let this boom in sports businesses be just a temporary phase

With the upcoming 2020 Tokyo Olympic and Paralympic Games, more people are calling to establish sports as a business

and integrating sports as part of our culture. Technology such as Virtual Reality (VR), Augmented Reality (AR), 5G, artificial intelligence (AI) and the Internet of Things (IoT) are now being used at stadium and for sports-related services. However, we knew that while there was great potential for integrating sports and technology, an approach that places technology at its core did not always succeed based on our experiences. Thus we focused on the "spectators' experience" and considered the Customer Experience as defined above. By making the experience visible and comparing it with other countries', we can explore solutions and hints that would improve the experience underlying sports and making it more attractive.



Participants were asked to respond to the following question based on their overall experience of attending a game(s): "How likely are you to recommend to your family, friends and acquaintances to attend future sporting events at a stadium?" (11 recommendation scores between 0 to 10). In addition, we asked, "How did the following 14 types of experiences (listed in table 1 below) affect you?" Participants were asked to select one of the following responses: "very negative", "negative", "somewhat negative", "no opinion", "somewhat positive", "positive", "very positive". Also, participants were given the chance to elaborate on the perceived cause(s). Here we attempted to understand the participants' detailed experiences and thoughts.

The responsibility for improving the spectators' experience does not rest with

Emotion Tech, a service provided by Emotion Tech corp. was used for this survey.

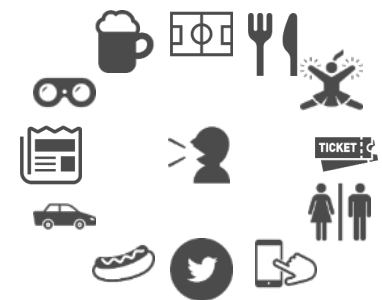


Table 1. 14 experiences which affect the spectators' experience

Experiences	
1	Being aware of the game
2	Considering going to the stadium to watch the game, gathering information or discuss whether going or not till a decision is made
3	Ticket purchase process (ticket machine, Internet, Telephone support, etc.)
4	Gathering information on the team and the game and receiving emails related to the game before watching the game
5	Getting to the stadium on the day of the game
6	Arriving at the stadium and getting inside
7	Spending time in the stadium prior to the game (including player introductions)
8	Watching the game (play, refereeing, commentary, rooting, foods and drinks, temperature)
9	Halftime
10	Leaving the stadium
11	What fans do after the game (e.g. eating, drinking, outside and inside the house, etc.)
12	Check the Internet, SNS, and TV after the game to gather information
13	Use the Internet, SNS, and phone after the game to share your thoughts
14	Check the Internet, SNS, and TV on the following days to learn more about the team and players

Understanding the Results

Impact on the Recommendation Score and the Current Positive Impact

By analyzing the responses, we know how each experience surrounding the game impacts their Recommendation Score (blue curve in Figure 2). Also we know whether a particular experience affects positively or negatively with the Current Positive Impact (orange curve in Figure 2) by offsetting the impact of those experiences. When these curves are diagrammed, they visualize the current spectators' experience and reveal the areas that can be improved.

I. Impacts on the Recommendation Score (Blue Curve)

For example, "Customer Experience 1, 5, and 8" in Figure 2 show a steep upward curve when compared to other experiences. This means that these experiences (positive or negative) greatly affect the Recommendation Score. Obviously, these are areas that customers consider (or considered) important. The values of these curves are assigned scores (maximum of 100 at the highest).

II. Positive and Negative Factors on the Recommendation Score (Orange Curve)

When calculating I, the curve shows the values that off-set positive and negative

impacts. A large deviation from the blue curve shows that more people will respond the respond to the experience negatively affected to the Recommendation Score. This can be used to measure a fan's current satisfaction.

III. Scale of Enhancing Effects

This shows the gaps between I and II. Experiences with large gaps can be described current satisfaction is low while these experiences greatly impact the Recommendation Score. By enhancing the experience and bringing line II as close to line I as possible, we aim to make all of impacts positive to the Recommendation Score.

IV. Potential Needs

This shows areas where customers are not significantly responding to the experience. Good or bad, these experiences are not having an overall impact. Thus they are low priority when considering "enhance the spectators' experience". However, potential needs may be hidden in these areas. If these areas show no positive or negative impacts at the moment, they could go either way in the future. These are the areas that are ripe for innovation.

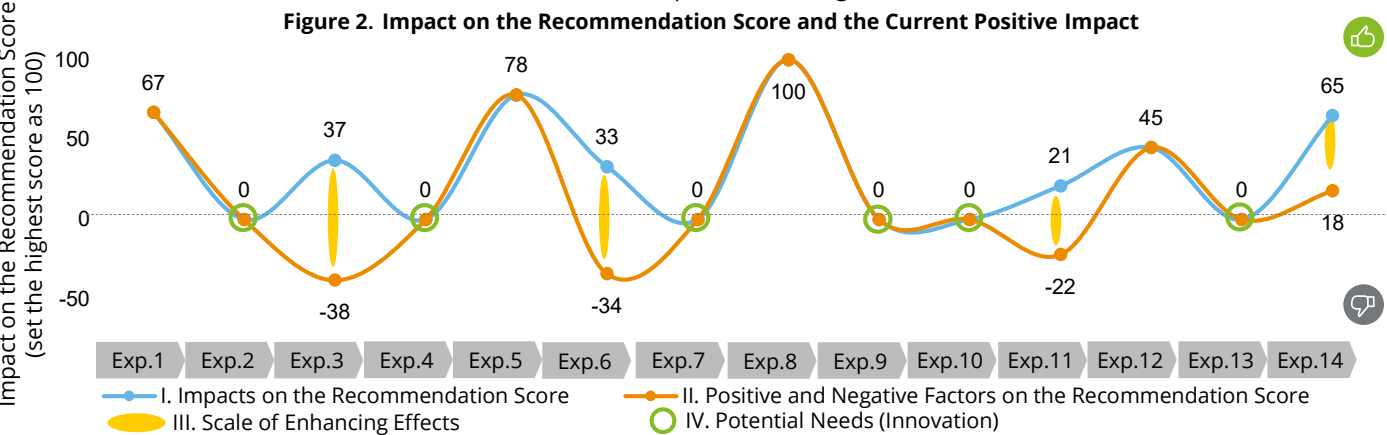
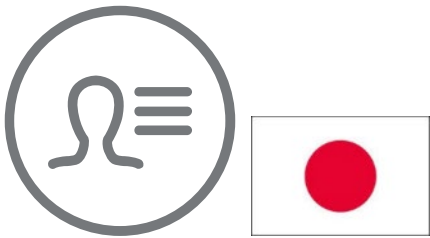


Table 2. Point of view from the Recommendation Score and Figure 2

What it Demonstrates	Definition
I . Impacts on the Recommendation Score	The larger this value is, the larger the impact it has on the Recommendation Score. Experience values of 0 do not impact the Recommendation Score.
II . Positive and Negative Factors on the Recommendation Score	When this value is higher than 0, it increases the Recommendation Score. When this experience value is lower than 0, it decreases the Recommendation Score.
III . Scale of Enhancing Effects	The size of this value is proportional to the Enhancing Effects of this experience. Even if a certain experience already increases the Recommendation Score, there is still a room for improvement.
IV . Potential Needs	Fans show no response to this experience. Thus providing a totally unexpected experience (value) may lead to innovation in the customer experience.

Source: DTC survey based on Emotion Tech Inc.

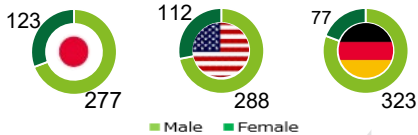
Survey Sampling and Respondent Attributes (Japan)



Football was selected as the sampling sport in Japan; in parallel to two other sampling countries: United States and Germany.

Our sampling sport is football. To compare differences in trends across countries, we selected Japan, Germany (where football thrives) and the United States (flourishing sports business). We gathered 400 sample responses via an online survey. The condition placed on potential respondents was that they had “watched a football game at a stadium at least once within the past year”.

Figure 3. Gender Ratios among Respondents



Japanese respondent attributes: Age ratio was almost identical, with approximately 90% watching professional games

We found that respondents' age groups in Japan are balanced overall. Though we were unable to obtain a sufficient number of under-18 respondents. However, Compared to other countries, it is characteristic that 14% of Japanese respondents were over the age of 60. Professional games (Japan Professional Football League: J-League) dominated 75% of Type of Game Watched by the Respondent with 67% of spectators watching J-League division 1 (figure 5). Considering that some respondents had been to numerous games in the past, we asked about the “one game they remember the most”.

Team, player, and sports fans who did not belong to a fan club

Close to half of the respondents do not belong to a fan club but identifies as fans of a team, player(s) or football as a sport. The fact that few respondents referred that the relationship with football is due to family or friends, such as family members participating in sports days or competitions, indicates that football is establishing itself as a mature professional sport. Another point of interest was in the “other” section. 36% of respondents using the “other” section said, “I have no special relationship [with football]”. However, 17% of respondents said “because it’s my hometown”. When the J-League first emerged, there were only ten clubs. Now the league consists of 55 clubs, which equates to at least one club per prefecture in Japan. Teams are now recognized as hometown clubs. Though some spectators may not even identify themselves as fans, it is possible that these individuals are coming to the football games as a regional event rather than a sport.

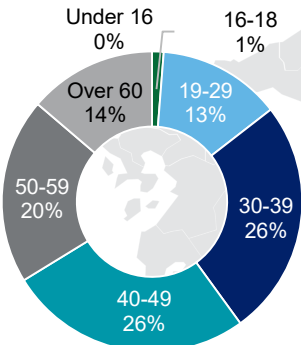


Figure 4. Age Ratios of Respondents (Japan)

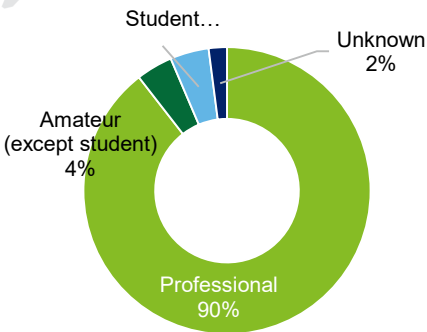


Figure 5. Type of Game Watched by the Respondent (Japan)

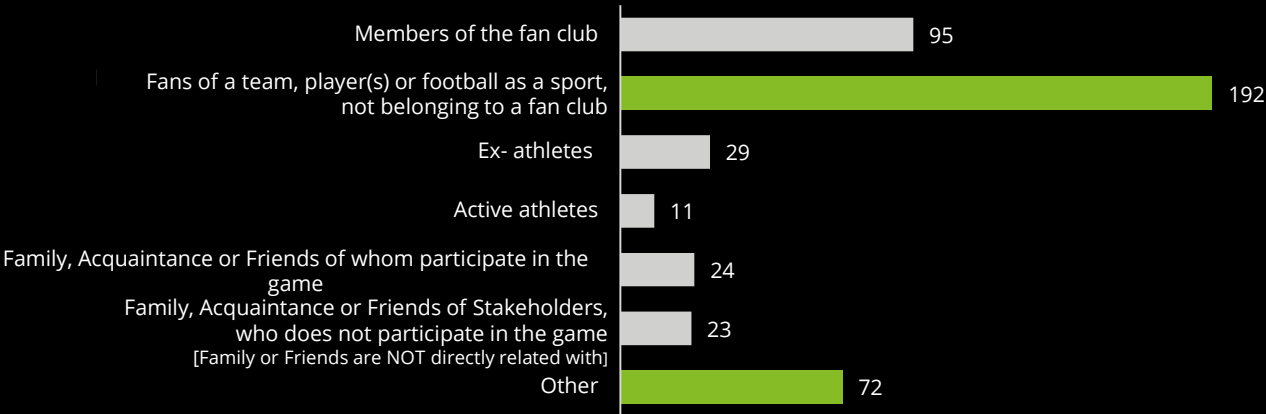


Figure 6. Relationship with Football (Japan)

Survey Sampling and Respondent Attributes (United States of America)



Around half of the sample consisted of people in their 30s and there was a consistent number of spectators who watched the game of students and amateurs

The U.S. data shows that 46% of respondents are between the ages of 30-39, making up nearly half of the entire sample. Respondents aging 60-and-older occupy only 4% of the sample, a lower percentage compared to Japan (14%). The number of responses from under-18s was insufficient. As to Type of Game Watched by the Respondent (Figure 8), amateur and college sports made up 11% and 13% respectively while professional sports occupied 75%. This indicates that college sports – an established brand in the U.S. – can be viewed as characteristic of American sports culture.

In America professional football is known as MLS (Major League Soccer) which is the first division, while competitiveness of the second, third, and lower divisions are equivalent to or lower than the Japan Football League (non-professional). Our survey asked the respondents, in which league the game (they've watch) was held, and 54% responded "1stDivision". This means that MLS is reflected in approximately half of all responses with amateur and college sports reflected in the other half.

Supporters in fan clubs

Approximately half of the respondents supporting a team or player belong to a

fan club. If we include fans of particular teams and players who are not members of a fan club, fans account for over 75% of the total sample. Another characteristic of American responses was "a family member, acquaintance or friend participate in the game". Of all the responses, 79 people selected that as an answer. There is a certain number of people who watch the games when someone close to them plays. The difference between the U.S. and Japan is that there is stronger tendency for ex-players and active players to watch the game.

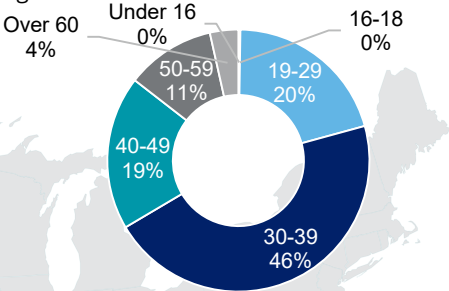


Figure 7. Age Ratios of Respondents (The U.S.)

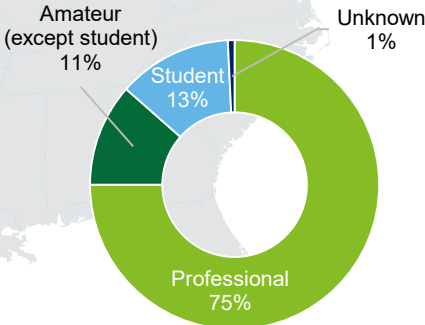


Figure 8. Type of Game Watched by the Respondent (The U.S.)

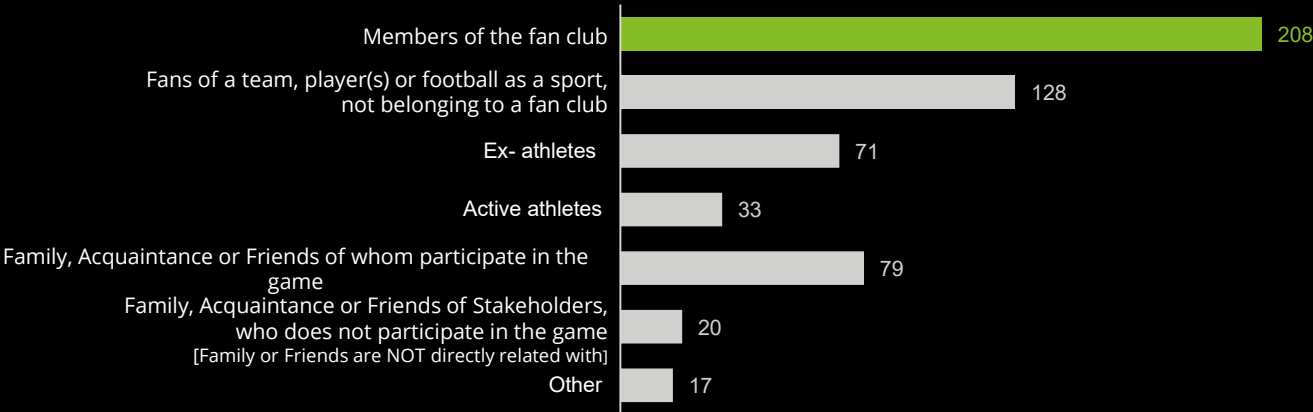


Figure 9. Relationship with Football (The U.S.)

Survey Sampling and Respondent Attributes (Germany)



The majority of German respondents are in their 30s, 80% of spectators experience was from professional sports, consisting a balanced spread across age groups for this sample

A look at the attributes of German respondents shows a balanced spread across age groups, despite 30-to-39-year-olds occupying 34% of the entire sample. Persons over age 60 only accounts for 5% of the sample, a lower percentage compared to Japan (14%) and the U.S. Not enough responses were received from the under-18-year-olds. Though not as high as Japan's 90%, approximately 80% of Germans selected professional games as the category of game they watched. An interesting characteristic in the German profile is that amateur sports, excluding college sports, makes up a sizeable 17% (compared to 4% in Japan and 11% in the U.S.). This case is different from U.S. college sports as many professional clubs run subordinate teams. This reality is reflected in the category of games attended by respondents.

Teams, players and sports fans represent three quarters of the sample with active footballers also attending games

Similar to Japanese and American respondents, many German respondents were fans of a team or player(s), regardless of their fan club membership. It's worth noting that 77 respondents identified themselves as active sports players. As we did not ask the

respondents what kind of player they are, therefore it's possible these respondents are football players from Bundesliga or lower league. It may be because Europe has many clubs that possess a variety of teams competing in several sports and that it has become the norm for professional sports players to watch games involving other professional sports players.

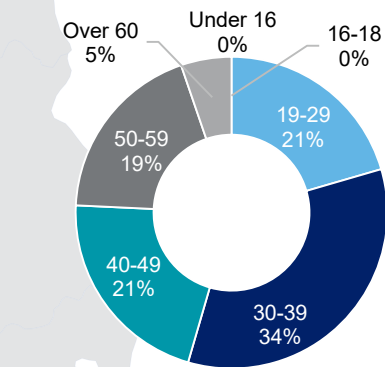


Figure 10. Age Ratios of Respondents (Germany)

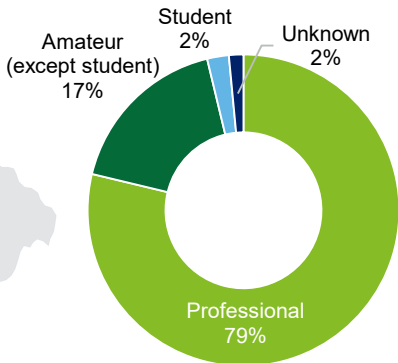


Figure 11. Type of Game Watched by the Respondent (Germany)

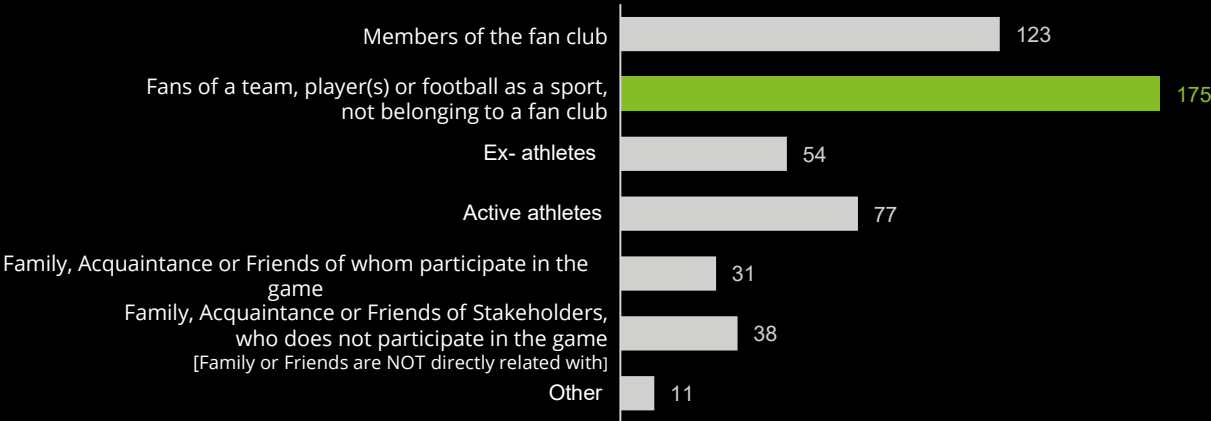


Figure 12. Relationship with Football (Germany)



Survey Results Summary

Watching the game itself is highly influential in Japan, whereas a variety of experiences centered around the game plays a bigger role in Germany. On the other hand, in the U.S., experiences prior to and after the actual game are highly influential.

The U.S. stands out for its recommendation score

Based on stadium spectators' experience, we asked respondents how likely they are to recommend watching the game at stadium to others. The U.S. respondents showed the highest average (8.9%), followed by Germany (8%) and Japan (7.4%). While it does not appear to be a stark difference in results, the way these results are distributed indicates a significant disparity. For instance, 70% of Americans chose a recommendation score of 9 or 10 while 48% of Germans and 31% of Japanese selected the same levels. Even factoring in Japan's tendency to avoid attributing a score of 9 or 10, these results are far from high. However, a glance at the remainder of the data precludes us from taking a pessimistic view of these numbers.

Table 3. The Recommendation Score at Stadium (by country)

	Japan	The U.S.	Germany
The Recommendation Score	7.4	8.9	8.0
The rate of The Recommendation Score 8 and 9	31%	70%	48%

The effects of watching game itself came in first place for Japan and Germany, whereas it only assumed fourth place for the U.S.

Differences between countries become apparent when individual experiences which affects the recommendation score are considered (how likely you are to recommend a stadium visit to acquaintances and friends). Compared to Japan and Germany – countries where the game itself is an influencing experience – for example America, are influenced more by surrounding experiences, such as information gathering before the game and how time is spent at the stadium (from the moment one enters to the start of the game) (table 4). However, the influence these experiences have are not necessarily positive.

People have high expectations for experiences other than watching game in the U.S.




In the U.S. case, there is a low level of satisfaction with the two experiences, gathering information before the game and time spent prior to the start of the game, while they have a big impacts on the Recommendation Score. In terms of Positive and Negative Effects on the Recommendation Score, the effects of

these experiences are largely negative. Specifics will be touched upon later in this document. One cause for the negative effects is frustration with the messages received by individuals and exhaustion related to stadium crowds. The former may be the result of outlet mail marketing, such as mail magazines, for sports spectating is recognized as a market in its own right.

Experience surrounding the actual game-watching has small influence in Japan

What stands out about Japan is the wave-like pattern it presents (figure 13). Though game spectating is the most influential factor (as in Germany's case), the impact of experiences other than the game spectating itself is extremely small, especially the post-game experiences. As a result, we see a flat line representing experiences other than game spectating. Compared to the U.S. and Germany, there are few gaps between the yellow and blue lines (meaning there is no dissatisfaction) for Japan. This may point to the relatively underdeveloped nature of spectators' experiences in Japan. This means that there are plenty of opportunities to make football spectators' experience more enjoyable.

Table 4. Top 3 Experiences(exp.) which influenced The Recommendation Score at Stadium (by county)

	Japan 	the U.S. 	Germany 
The most influential exp.	Watching the game (performance, refereeing, actual conditions and commentary, support, food and beverages, weather, etc.)	Information related to the team, information gathering, emails, etc., prior to the game	Watching the game (performance, refereeing, actual conditions and commentary, support, food and beverages, weather, etc.)
Second most influential exp.	Finding out about the game	Finding out about the game	Getting to the stadium on game day
Third most influential exp.	Getting to the stadium on game day	Time spent entering the stadium and in the stadium prior to game start (player introductions, etc.)	Following the game, acquiring and viewing information on teams and players on the Internet, social media, TV, etc.

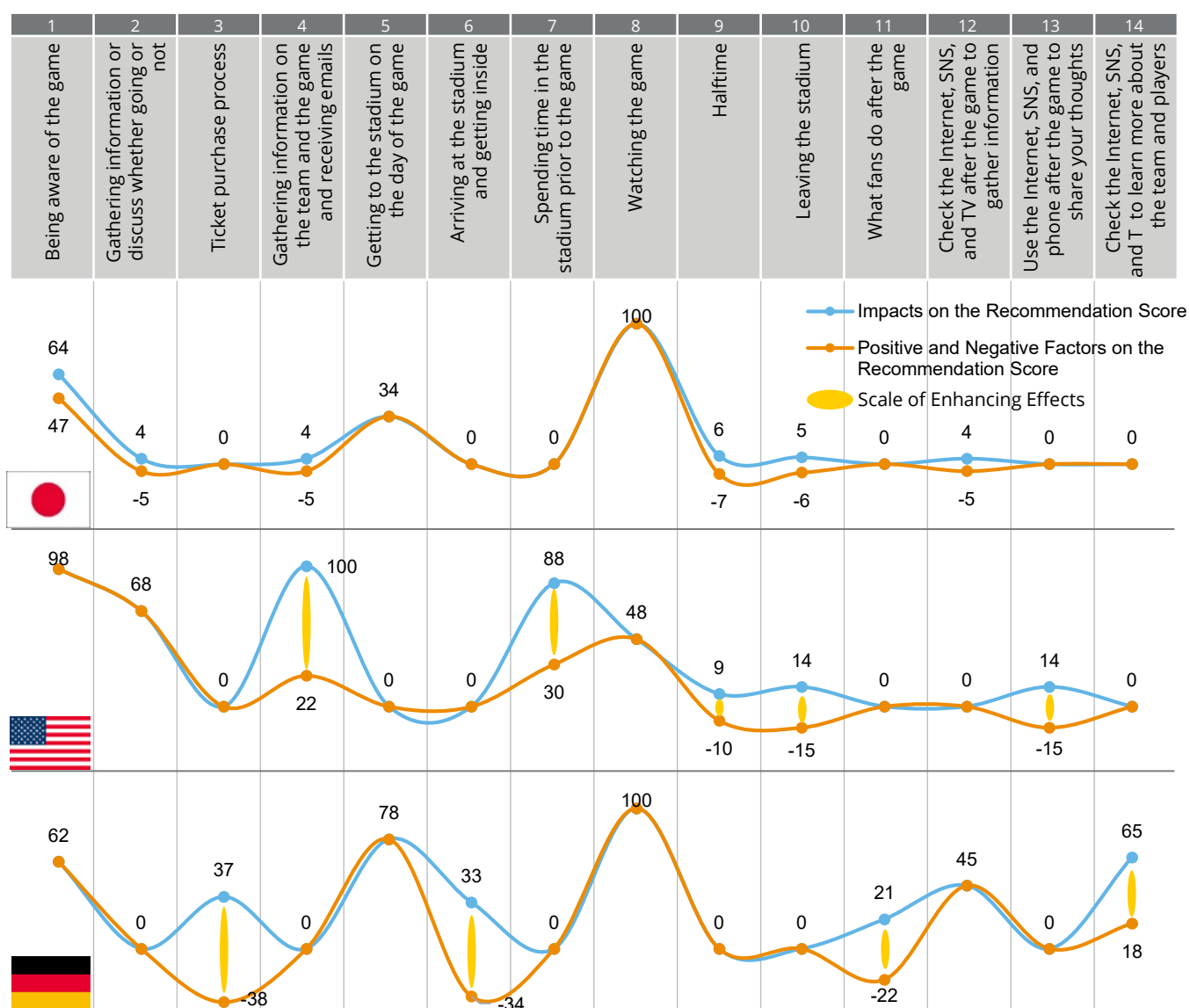


Figure 13. Impacts on the Recommendation Score in Every Experience and Positive and Negative Effects on it (by county)

It is for this reason that not only the hosts of games, but that stakeholders such as the media, stadium managers, management companies, event organizers, ticket sales companies, catering, restaurants, hotels, public and private transport networks need to share their vision and work together to improve the spectators' experience. Of course, there is room for improvement not only on the management side but also for those who watch the games. There are many hidden lessons that, once learnt, can help establish sports as a business and part of culture in Japan.

Post-game experience has a large impact on sports spectating experience in Germany

Watching the game heavily influences recommendation scores in Germany's

case. This is expected, as football flourishes in Germany and the country has a well-established cultural attachment to sports. Ticket sales and getting to the stadium on the day of the game are also influencing factors. Factors differentiating Germany from Japan and the U.S. can be found in the post-game experiences. The data shows that a wide range of post-game experiences bring both positive and negative impact, whereas America seemed to be heavily influenced by the transmission of information. The fact that football is widely enjoyed and the root of dissatisfaction is other than watching the game is proof that sports play a central role in German culture's daily life.

There is one experience that brings common influence across all three

countries. That is "1. Finding out about the game". There are commonalities that are constant across countries, such as the moments of excitement and anticipation when "finding out the game is being played in my town", "this will be an interesting matchup", and "I may get to watch this team play".

Spectators' experiences around the world can become more enjoyable

This survey only investigated experiences toward football and was limited to three countries. The survey shows a potential to make sports more enjoyable in Japan and around the world. While interest in sports as a business is blooming in Japan, fans welcome stakeholder engagement, collaboration and unanimity in designing and achieving an unforgettable spectators' experience.



Perspectives from the Sporting World

We asked representatives from the Japanese sporting world about our survey results and their opinions on spectators' experiences across sports they are in charge of.



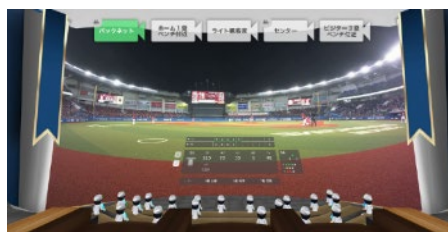
Masaaki Kimura, Senior Managing Director
Public Interest Incorporated Association
Japan Professional Football League

A sense of unity would create energetic atmosphere and make people feel touched

This report would be a great reference. Though I regularly invite a diverse group of individuals to our games, I get better responses when I ask someone "Want to grab a drink?" as opposed to "would you like to watch a football game?" People instinctively judge what they like and dislike. It is important they find how much they enjoy the whole spectators' experience. I believe that both, excellent performances by players and teams and creating a fantastic spectators' experience by club, would help energize the scene and move people.



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Yuki Arai
Head of Media business
division and Digital
Marketing Division
Pacific League Marketing
Corporation

We need to think beyond the stadium when providing game spectating value

We are currently implementing a live virtual reality streaming service for 36 games on league TV. Our goal is to provide a new spectators' experience with technology that does not limit a person to spectating at a stadium. For the PERSOL Climax Series we also live streamed content with a VTuber (Virtual YouTuber). Though stadiums are of central importance to the sporting world, we want to meet the underlying needs of spectators by providing valuable spectators' experiences outside of stadiums. There is a lot of room to recreate it.



Yuki Ota, President
Public Interest Incorporated
Association Japan Fencing
Federation

"Touche" the hearts of your fans

We revolutionized our game by moving the finals from a gym to a theater to provide an extraordinary experience. It was not about making the competitions themselves more profitable but more about showcasing the competition's management and efforts and providing sponsors with the opportunity to achieve greater sales. By making the games with overall high customer satisfaction, we hope to keep making our players, fans and sponsors highly satisfied.



Photo by Shugo Takemi



Takeshi Okada, Chairman
Imabari. Yume sports Inc.

In Japan, people's first experience with sports starts with physical education as a part of primary education. This creates a lack of business perspective and cultural vision.

There is a great potential in the Japanese sporting world

If a sport cannot be turned into a viable business, it will be difficult to develop, sustain and establish it as a part of the broader culture. The Japanese sporting world is finally realizing the importance of fan engagement at stadiums. The data shows that in other countries, experiences that occur before and after the game can

have a large impact on customer satisfaction.

On the other hand, In Japan, watching the game has been the main concern and which shows a lack of focus on other experiences by stakeholders. Through this survey, now I know by channeling our energy toward these areas could potentially generate greater growth.



Yota Kimura, Senior Vice President
Yokohama DeNA Baystars baseball club, Inc.

Focus more on the “appetizers”

The fact that there is a bias toward focusing exclusively on enjoying only watching the game for professional sports in Japan tells me that sports businesses have a lot of room for growth. At the Yokohama DeNA Baystars, we are concentrating our efforts on “appetizers” such as a performances and events. However, we will not lose the sight of the main attraction – the baseball. People come to our games for a variety of reasons and ideally we want our fans to appreciate our sporting performance. You will not see a home run at every game because that is not something you can create out of thin air. However, if you put on an excellent show when that moment does occur, it will make the experience an unforgettable one, won't it? That is what we'd like to achieve and I think there are more improvements to be made.



Kazumasa Ashihara,
Executive Director
Public Interest Incorporated Association
Japan Professional Basketball League

Satisfaction is created through hospitality and empathy

“Hospitality” is a strength of Japanese culture. That said, I am sure the Japanese sporting world could make some improvements in that area. The B.League(Japan Professional Basketball League) should focus on how to get customers to empathize with the services it provides in ways that increase customer satisfaction. We have been experimenting with a PDCA cycle to that end. By making “spectators’ experience” visible, the survey allows us to plan and activate marketing measures scientifically instead of relying on our instincts for our decisions. The survey is an excellent source for a sports business.



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Kanji Wakunaga,
President
Public Interest Incorporated Association
Japan Handball Association

Use new technologies to connect fans and players

When visiting Germany for business trip, I often feel that sports are alive and kicking throughout the entire city regardless of its size. Sports invigorate a region and regions invigorate sports. It is a healthy cycle. The Japan Handball Association wants to utilize technology to connect fans and players and to stimulate regions. We also plan to reference Deloitte's customer loyalty index to create mechanisms to have people enjoy sports.



Yasuharu Uryu,
Project Manager
Top League Next
Public Interest Incorporated Association
Japan Rugby Football Union

Even those who attend a game for the first time should have a good time

Rugby culture is like a puritan. You watch the game and then go home. We have great support from our traditional fan base but we need to think about hosting stadium events and utilizing social media for entertainment beyond the game so that new fans can have a memorable time. While this change will not come overnight, we would like to use the survey to continue experimenting new methods and ideas. I am certain that this survey is extremely valuable for these reasons.



Masafumi Yano, President and CEO
Imabari. yume sports Inc.

I want supporters to feel excited and thrilled in ways they have never felt before

Recommending a friend to attend a sports watching requires you to exceed a certain line. Recommending something changes to a certain extent when you are responsible for that recommendation. Though customers who attended this survey may not have recommended their friends to attend the watching the games, they are sure to become a responsible person. I want to respond to customers' suggestions and improve the areas that will have the biggest impact on their experience. Also by understanding their potential needs and providing a sense of excitement and anticipation, I want give customers the excited and thrilled experiences they have never felt before.

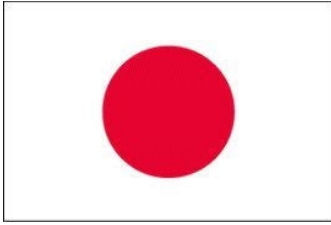


Atsushi Mekar
Professional Handball Player

People enjoy players' drama and empathy

In Japan, there are two ways to enjoy sports. One is enjoying the game itself and the other is enjoying the drama and empathizing with players. Since Japan does not have the same cultural attachment to handball as European countries, the effects of what happens on the arena are more influential than the information gained before and after a game. The way we view the sports changes when we learn about an up-and-coming player or a player's catchphrase. We can also enjoy information about individual players before and after a game. This requires putting information on the web and in the media. In the handball sports business, though it is still consists of company teams, it is important that we demonstrate the professional integrity of players and how we cherish our fans.





Football Spectators' Experience in Japan

Improvements can be found by creating value beyond watching the games

Compared to other countries, a lower percentage of fans are “already committed to watching the game”

In Japan, 55% of respondents answered “I watch a game because I am a fan” as the reason they attended a game. This figure is significantly lower than American (78%) and

German (82%) respondents. However, many Japanese respondents were “fans of the sport” when they “happened to find out a game is being played”. Compared to American and German respondents, there exists a segment in Japan of people who “like football but are

not fans that attend every game”. There is room to improve the recommendation score of respondents who were “invited by an acquaintance or friend” The average recommendation score for Japanese respondents (11 choices of 0-10) was 7.4. One explanation for this figure is

Figure 14. The Reason Respondents Attended a Game

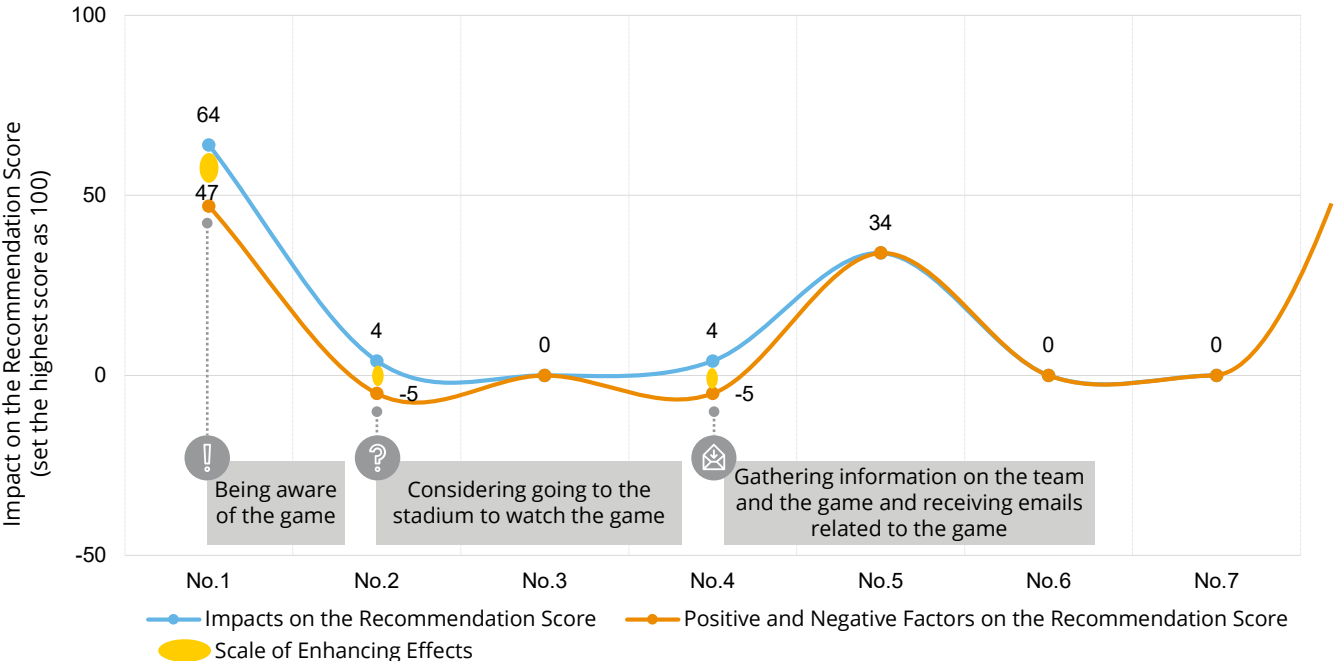
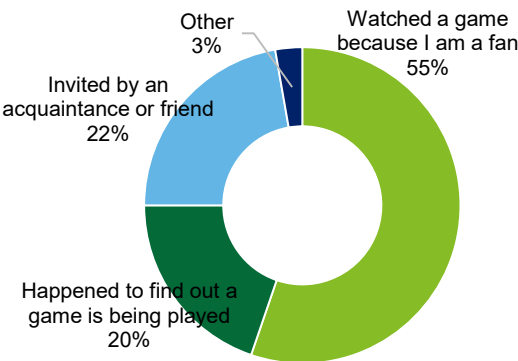
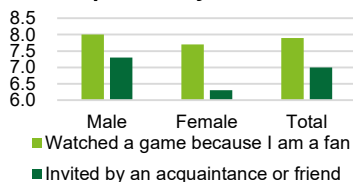


Figure 15. Spectators' Experience in Japan (Impacts on the Recommendation Score in Every Experience and Positive and Negative Effects on it)

the large gap between “I watch the game because I’m a fan” respondents, who had a recommendation score of 7.9, and respondents who were “invited by an acquaintance or friend”, who had a recommendation score of 7.0. When controlling for female respondents, the recommendation score drops even further to 6.3. These numbers indicate that “amateur football game attendees” invited by a friend or acquaintance are not having a satisfying experience.

Figure 16. Average Recommendation Score Separated by Gender



Japanese spectators’ experience relies on “the game itself”

Apart from “when I found out about the game” and “game attendance”, lines representing the characteristics of Japanese spectators’ experience are flat (figure 15). Similarly, there is little difference between the blue and the orange lines. Instead of viewing this as a case of “little room for customer experience improvement”, we can interpret this as a “lack of spectators’ experience beyond the game itself” when Japan is compared to the U.S. and

Germany. The Japanese spectators’ experience requires creating positive experiences instead of improving negative ones. If there are no factors that lead to positive experiences beyond the game itself, then amateur football game attendees will not increase satisfaction levels.

Emotions run high when people find out about a game

In Japan, the second most influential factor was “when I found out about the game”. Most respondents who identified as “fans” had positive feelings when they found out about a game. There were limits to the positive impressions non-fans had when they found out about a game, though some expressed that they were “happy to hear that player X will be in the game” or “I can watch X team play in my home town”.

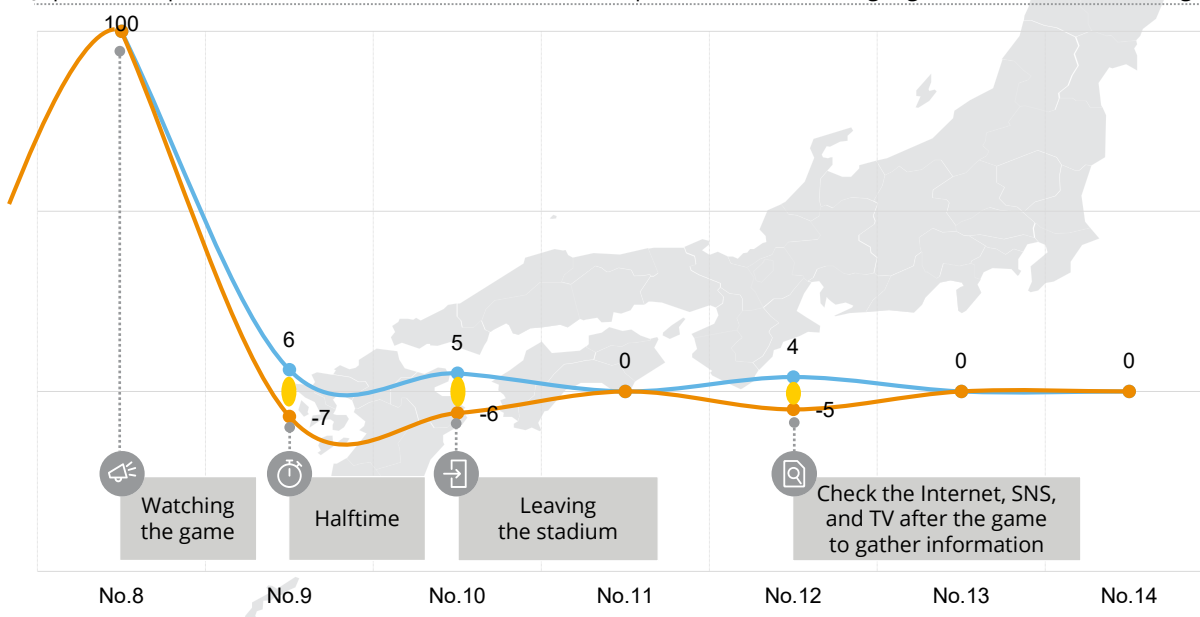
Experiences before and after the game

While “experiences before and after a game” currently have little effect in Japan, we can view this aspect of the spectators’ experience as increasing in importance in the future, given that this kind of experience has strong effects in the U.S. and Germany. What stands out among opinions about pre- and post-game experiences is dissatisfaction with the “difficulty of being in a crowded place” and “long distances walked”. This signals a need for improvements in clear signage

and walkways for people with little experience with attending a game. However, there are cases of individuals construing crowded spaces in a positive light, stating that “entering stadium with so many other people gave me feeling of something interesting going to happen” and “I could feel the enthusiasm of each person circulated around”. While “crowdedness” is a factor contributing to dissatisfaction, it is also a significant factor in shaping liveliness. It is important for beginners, who may find it difficult to enjoy spending 90 minutes concentrating on the game, to experience a “lively” atmosphere of support and passion.

Experiences after returning home

The spectators’ experience is also connected to experiences after a person returns home that lead to the desire to “watch the next game”. Positive experiences after returning home include “enjoyed watching the sports news”, “there was lots of activity on social media, so I posted something of my own” and “I shared my thoughts with other supporters”. There were also “I did not do anything and there was no effect” responses. There are two highly influential factors: “I have a friend with whom to discuss the game” and “I am part of a social media network or community”. It is important to consider how to communicate with the non-fan segment after the end of a game.





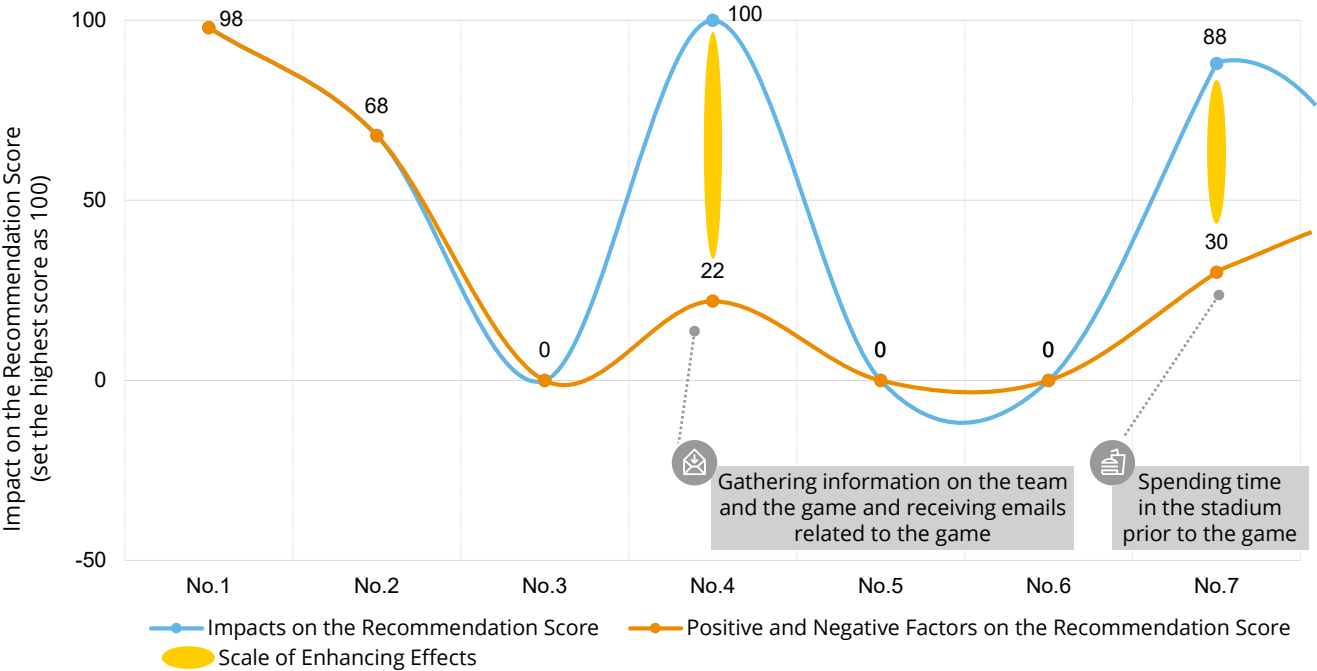
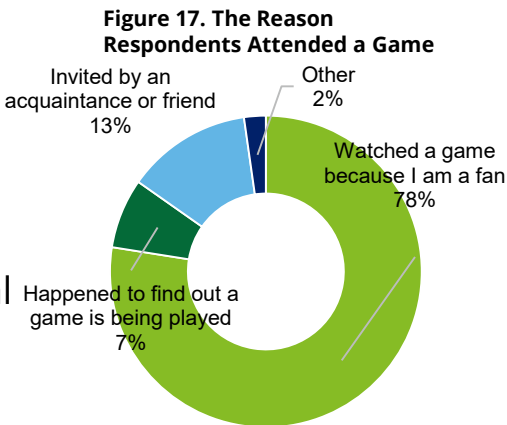
Football Spectators' Experience in the U.S.

Experiences prior to game attendance are influential and require improvements

Being the fan of a local team is a reason for attending a game
The most prominent reason for attending a game was, "I'm a fan" (78%), a much higher percentage than in Japan (55%). Given that respondents chose "team location is in my area of residence or city" as the reason they attended a game at a

stadium, we can assume that respondents were fans of the local team. In Japan and Germany, many respondents chose "team location, and not my area of residence or city", which shows sports, including amateur and college sports more attended compared to other two countries, are linked strongly to a locality

in the U.S.
Preferences are divided based on information provided before a game
Experiences related to the pre-game information gathering and emails concerning games and teams had the greatest effect on recommendation



scores.

The level of satisfaction associated with these experiences can be divided into two categories. The first are the positive comments, which include “the spectators’ experience was fulfilling because I obtained information beforehand” and “by having information, I became more emotionally invested in the game”. The negative comments include a number of “I received too many emails”. It is possible that aggressive marketing techniques are backfiring.

Time spent before the game is a part of the “spectators’ experience”

Compared to Germany and Japan, the way time is spent before the game has a large influence on American respondents’ Recommendation Score. Many positive opinions clearly state that time before the game is “a part of the spectators’ experience”. There are comments concerning “time spent with friends and family” and “time spent socializing” scattered throughout the data. We can presume that Americans go to stadiums more to have fun with friends and family than to attend a game.

Half time means time for a chat with companions

Negative comments concerning half time, such as “boring” and “nothing happens”, brought down the recommendation score.

On the other hand, some had positive comments about half time as “time spent reflecting on the first half with a friend and predicting what will happen in the second half” and “time to chat with family members”. Many had the impression that half time at major American sports involves extravagant spectacles and shows. However, these spectacles do not always suit game attendees. Comments such as “boring” and “nothing happens” point to the need for appealing content, but basing content on the behavior of game attendees may be more important than finding a new performance to wow the crowds.

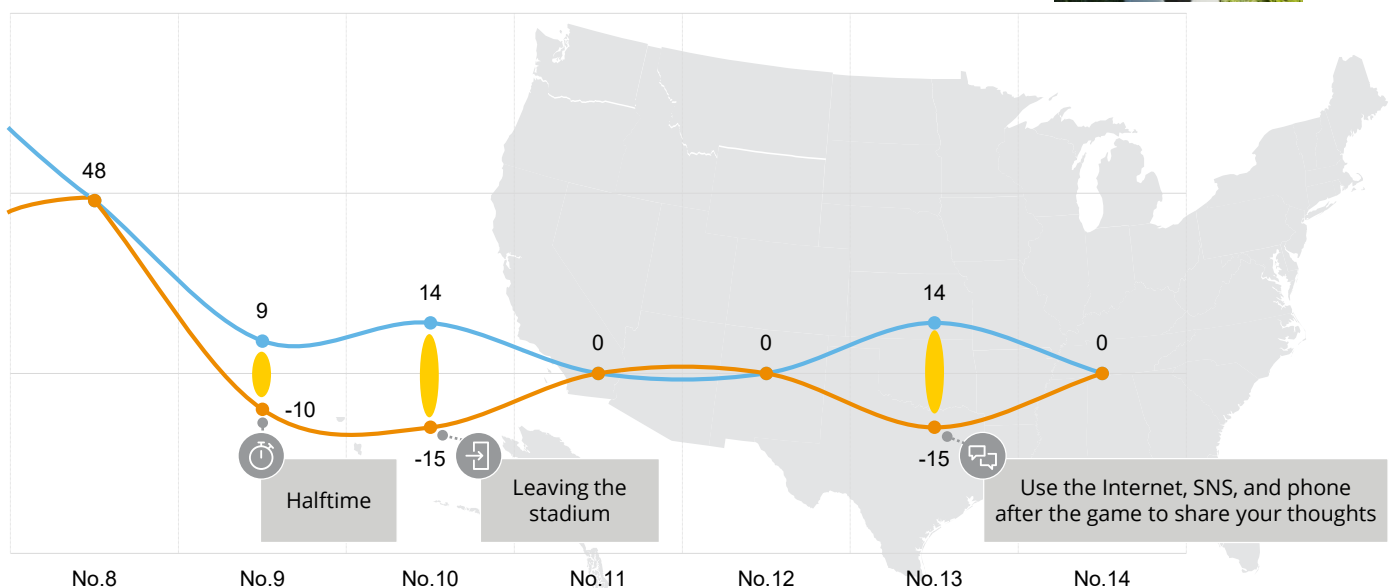
Team victories and time spent leaving the stadium are key factors to whether game attendees return for future games

Opinions on “whether I visit again depends on the experience (time spent till leaving the stadium)” indicate that filling this gap is an effective way to increase the recommendation score of game attendees. In the U.S.’s case, we can assume that many game attendees drive to the stadium. For that reason, many respondents cited factors that decreased the recommendation score such as “taking an hour to leave the car park” and “crowded with bad traffic”. Nevertheless how busy it is when leaving a stadium is not the only factor impacting the

recommendation score. The lingering effects of a game, such as “I had a good time because my team won” and “people were excited after the game”, also had a role to play nothing to do with crowded car park. It is understandable that since these experiences are immediately after the game, people’s reactions are impacted by the content and results of a game.

Activities reflecting sense of ownership often mark experiences after watching the game

Opinions on sharing what happened and their thoughts via social media and the telephone after returning home are divided. Many negative comments are just from “I do not use social media”. On the other hand, positive comments exhibiting a sense of ownership include “one way to support the team”, “I share my experiences with people who did not attend” and “I wanted others to know that I attended a game”. In the American case, being interested in sharing information, is the opposite of the German one, which displays great interest in gathering information and referencing.





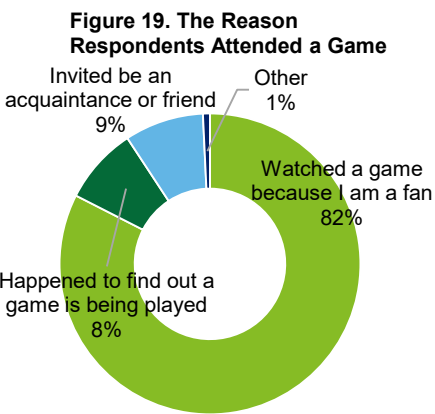
Football Spectators' Experience in Germany

Over 80% of respondents decided to attend a game in advance. Respondents were influenced by experiences other than the game and they had high expectations surrounding such experiences

Being a fan motivates game attendance
82% of individuals responded that "I decided to watch because I am a fan". This tendency is like that found in the U.S. The difference between Germany and the U.S. is the percentage of respondents who were "invited by acquaintances and

friends". The German case was 70% smaller than the U.S. This indicates that German game attendees are inclined to attend a game of their own volition.

There is room for improvement in the pre-game experiences, such as ticket purchases and entering the stadium



The biggest gap in ticket purchases is the price. Numerous negative comments single out expensive ticket prices. However, it is clear that there is also demand for tickets.

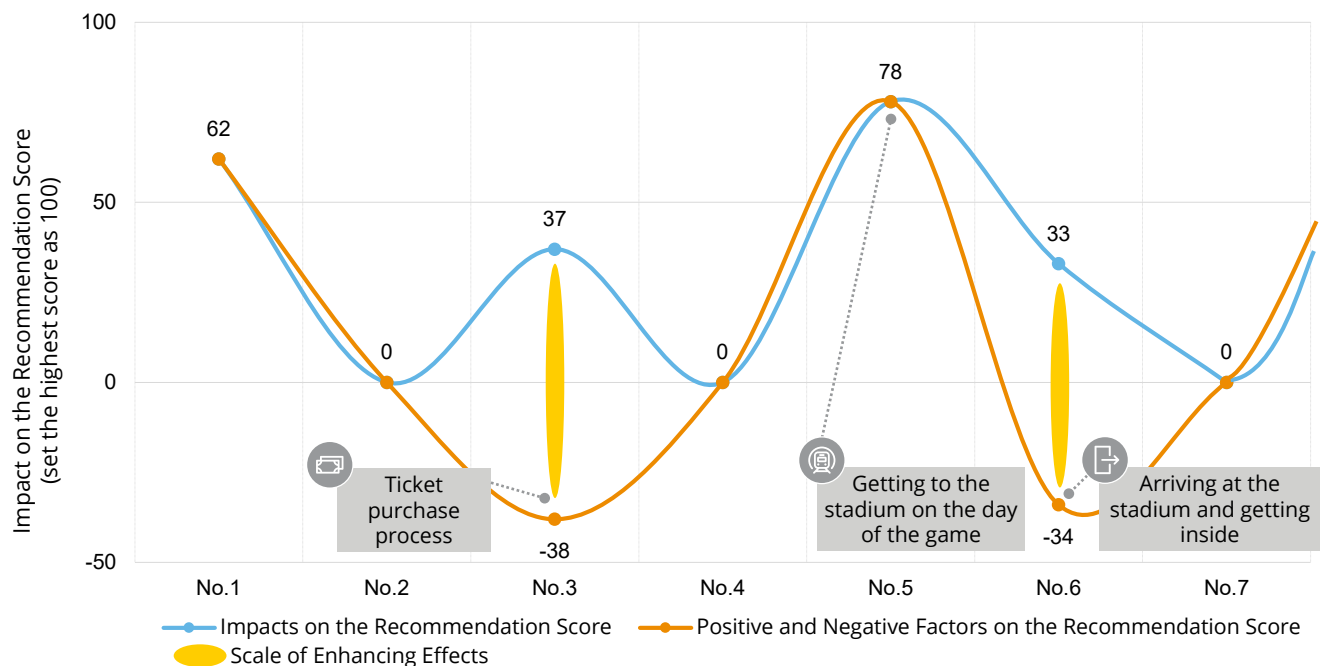


Figure 20. Spectators' Experience in Germany
(Impacts on the Recommendation Score in Every Experience and Positive and Negative Effects on it)

A common comment was “prices are expensive but worth paying to watch the game”. Interestingly a few respondents expressed dissatisfaction: “purchasing a ticket is a hassle”.

For Germans, the overall recommendation score is affected by the time spent waiting, long queues, crowds after arriving at the stadium and waiting to enter the stadium. This is a well-understood point of dissatisfaction. This is different in Japan because the Japanese are accustomed to seeing queues wherever they go.

The overall recommendation score is impacted by a series of post-game experiences

Respondents enjoy meals with friends and gathering information on social media and television after attending a game. Germans view these activities as belonging to part of the spectators’ experience. What is experienced during these activities has an impact on the overall recommendation score. Most respondents were satisfied with information gathering on the day. However respondents were dissatisfied with information obtained after the game from the following day. Few comments concerning this point stood out – “sharing information about the game is fun”, “there were new exchanges on Facebook” and “we always debate after the game ends” –

there were negative comments such as “there was no information” and “it is no fun when we lose”. The effects of a loss seem greater when compared to similar experiences after a game. Opinions were divided on how people spent their time outside the stadium after the game. Many went to a bar or restaurant to enjoy hot dogs and beers with other fans they met whereas some noted that “meals are expensive” and “fans get into arguments and fights.” It is not uncommon for trouble to occur when alcohol is consumed by a large number of passionate and excitable fans in Germany. One respondent commented that “hooligans are a nuisance”.

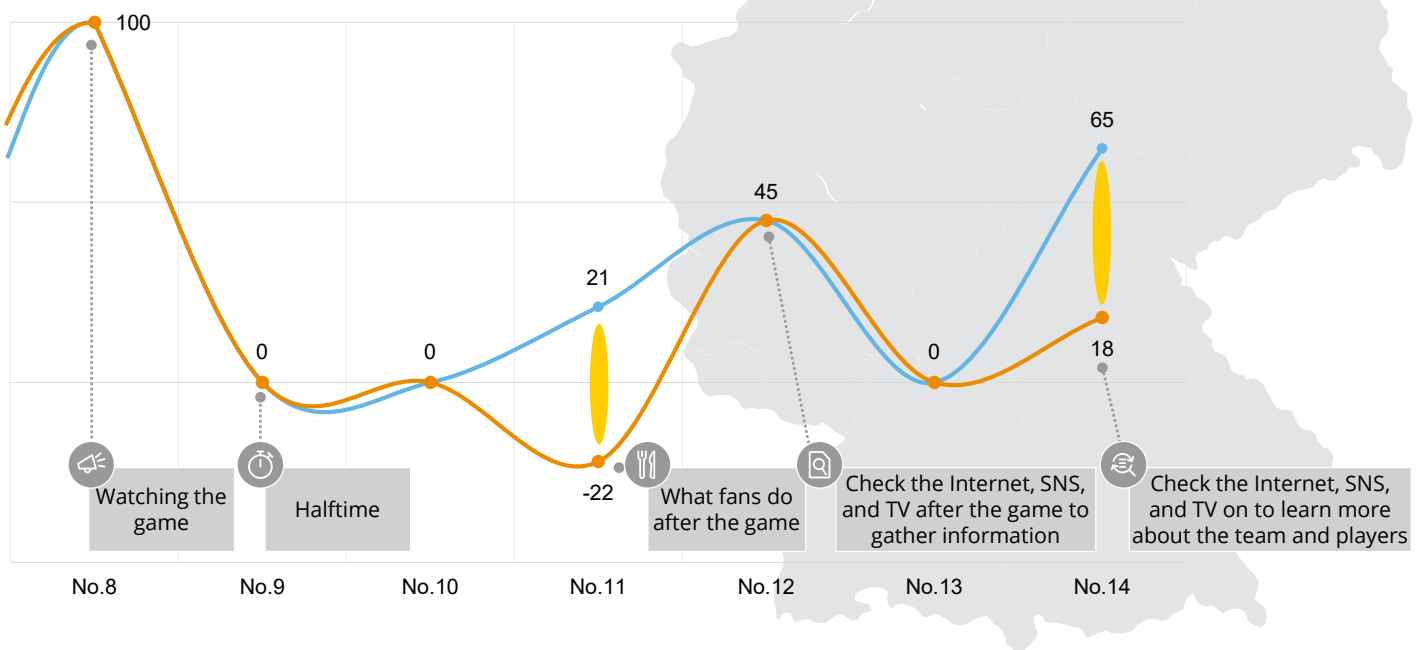
Half time is for toilet breaks and food

Most half times were spent either taking a toilet break or replenishing beer and food. The words “Wurst (Sausage)” and “Bier (Beer)” are scattered throughout the comments. Similarly “boring”, “I don’t remember”, “what did I do” are also found in the comments, indicating that half time is for resting and taking a break – as it is for players. It is understandable that American Super Bowl style half time shows involving famous singers were attempted in the past but were booed by the audience.

Compared to Japan and the U.S., Germany can be characterized according to the areas above and below the blue wave, i.e. the rises and falls in influence on the Recommendation Score. These indicate that the spectators’ experience is to be enjoyed from finding out about the game to spending time after the game through buying tickets, going to the game, post-game activities, meals and gathering information. These aspects are deeply embedded in German culture. For that reason, there is a clear level of satisfaction for each experience. Even though interest in half time is low, that does not necessarily mean that there must be a performance; time for a breather may be exactly what is needed.



Experiences before and after the game count as the “spectators’ experience”





Improving the Football Spectators' Experience in Japan

Excitement prior to a game is when people are brimming with anticipation and excitement. After the game is the key to motivating people to attend another game.

There is no need to imitate the case in U.S., but utilizing current potential will make the spectators' experience more enjoyable

Considering the survey results so far, we can see that there is plenty of potential in Japanese football where pre- and post-game experiences are concerned. For instance, refer to the survey results in figure 21. Though the sport is not named, a trial survey was run for the spectators' experience of an indoor sport. Though there was some excitement in information gathering (No. 4) prior to the game, the effect of game attendance (No. 8) is overwhelmingly large. Similar to football, there was little dissatisfaction (the gap between the blue and orange lines).

Although the clubs and teams are

expected to try to improve the situation, the spectators should expect more and express their opinions openly.

Some clubs provide an ideal experience

Though a range of experiences may be ideal, we can say that the climax of attending a game should not be the only watching-the-game experience. A regional club we surveyed (figure 22) this year produced interesting results. Experiences before and after the game (No. 7, 12 & 15) had a larger effect on the overall recommendation score than watching the game itself. (Some experiences in that survey were defined differently than in this report.) This club conceived of ways for game attendees to enjoy experiences other than the game. Many respondents

stressed that "attending the club's games increased the amount of time I spent with my family", "I really look forward to hearing from the players" and "the events at the stadium are enjoyable".

Though there may not be a perfect match across sports and the number of experiences used in that survey and in this report, it is a model that can be used to create a culture of sports and embed it in the locality. Clubs and management should step into the shoes of game attendees when designing and providing experiences. Game attendees should convey and share their expectations and levels of satisfaction. Mutual communication is bound to make the Japanese sporting world more interesting.

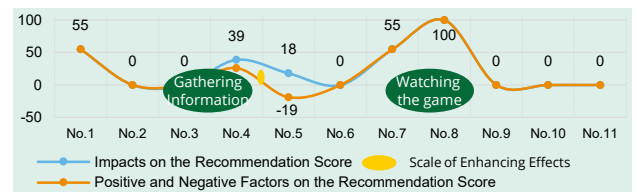


Figure 21. An Indoor Sports Spectators' Experience in Japan (from DTC survey, 2018)

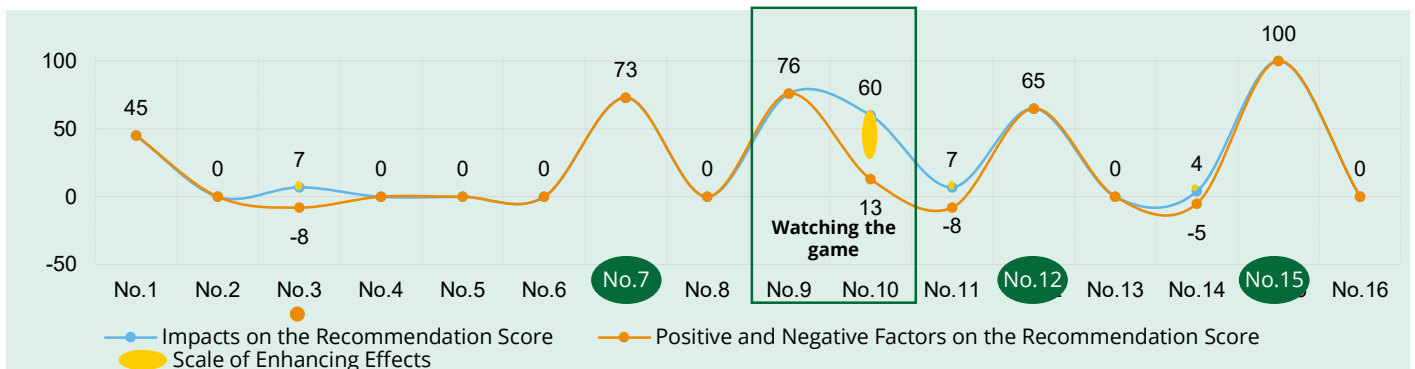


Figure 22. A Regional Soccer Club Spectators' Experience in Japan (from DTC survey, 2019)

Contributors

This report is not focused exclusively on football. It was drafted for people involved in all sports.

This includes parties interested in sports, managing organizations and sports entrepreneurs. Game attendees are also included. We hope this report contributes and adds to the appeal and potential of sports. For that reason, we decided to include the comments of those that showed an interest in our survey.

We would like to thank the organizations and individuals very much that contributed to this report.

This includes:

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- **Emotion Tech Inc.** (Survey platform)

Listed by comments(P.12,13) order

Editor's Notes

Many people use social media to share their spectator experience. This includes diehard fans and others who analyze the game from a distance. 25 years have elapsed since the J-League was founded. Many are excited about The 2020 Tokyo Olympic and Paralympic Games, the establishment of the B-League, T-League and the Japan Fencing Association. Such developments make sports an integral part of our daily lives. On the other hand, we regularly find regrettable incidents concerning sports in the news. Many say that this is proof that sports have yet to establish themselves as a business and in the culture of Japan.

This year marks the 107th anniversary of Japan's first participation in the Olympic Games. A show depicting the events of that period is currently being aired on the TV program. The first episode shows a scene where the president of Japan Association of Physical Education (which would become Nippon Sport Science University) objected to the president of Japan Amateur Sports Association mentioning "sports" is not "sports" but "physical education". Nobody knows if such a conversation took place is real. However, it is interesting because that conversation reflects the current situation in Japan.

The Japan Amateur Sports Association mentioning was founded in 1911. It changed its name to the Japan Sport Association in 2018 to "support sports participation and to hand down 'sports' culture to future generations", quoted from the president's greetings on its website. It is not a matter of deciding whether the European (sports as part of daily life) or American (sports as a show business) model is better. The question that intrigues me is what shape sports as a culture will take in Japan.

In the sporting world, some are of the opinion that players should come before all else. Others argue that game attendees and fans should be the priority. My advice to those organizations that have focused on one or neither is to turn their attention to both. Value both players and fans, or you will fade away. The Tokyo Olympic and Paralympic Games are coming. The Japanese sporting world should use the Games as an opportunity and focus on the activities offered after the Games have ended.

The Deloitte Tohmatsu Group started the Sports Business Group in 2015 and has continuously contributed to the development of Japan's sports business. The Customer & Marketing Division offers consulting services with customers'-perspective approach and that is, interprets the sports business from the POV of the customer.

We look forward to hearing your comments and opinion on this report.

Play your game in a "FULL" stadium

In my experience as a professional baseball player, playing a game in front of a full stadium was the highlight of my career. However, in Japan, few athletes play to a full stadium. There are many athletes who make unflagging efforts and dedicate their life to sports. I hope for you to use this survey to help sports flourish and develop as a business so more players can play in a full stadium.



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