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Say goodbye to the off-season
Engaging sports fans year-round

Contents

Introduction	4
Finding a frequency that clicks	5
Creating a connection with content	7
Picking your channel from a universe of options	8
Conclusion	9

This article is the third in a series addressing three individual aspects of fan engagement. The series started with *the stadium experience*, followed by an examination of engagement through *over-the-top (OTT) streaming and broadcast media*, and now finally with an analysis of *year-round fan engagement*. The series of articles is composed of findings from a Deloitte survey of more than 15,000 respondents who were asked about relative importance and level of satisfaction within key attributes of fan engagement.

The Deloitte survey asked each respondent to self-identify their level of fandom for each of eight sports/leagues: esports, MLS, MLB, NASCAR, NBA, NFL, NHL, and WNBA. For each individual sport/league, fans could self-identify at one of five levels: fanatics, love-it fans, casual fans, knowing the sport but not a fan, and not being familiar with the sport. Fanatics were defined as never missing a game—either in person or on TV, love-it fans were defined as watching often and going to live events when they could, and casual fans were defined as watching every now and then.



Fanatic



Love it



Casual



Not a fan



Not familiar
with the sport



Introduction

Today, with the proliferation of 24/7 sports TV channels, dedicated radio stations, and independent podcasts, there is no off-season. In fact, there have never been as many opportunities for sports organizations to stay connected with all their various fan types, whether it be serving fanatics or enticing casual fans to get more involved. As discussed through this series, fan engagement, which includes any form of consumption related to a sports team, can be the lifeblood of sports organizations.

Our survey finds that the more fans are engaged year-round the more likely they will spend on tickets and merchandise during the season. Further, off-season engagement can be a lever for moving fans up the tiers of fandom—pushing a casual fan who only watches games on TV to finally attend a game in person.

The survey results highlight the following data points regarding year-round fan engagement:

- Ninety-five percent of fans today have some form of interaction with their favorite team or league in the off-season
- In-depth content consumption was associated with 20 percent higher spend than general news consumption
- Forty percent higher preference among Millennials than Baby Boomers for using social media to obtain information on their favorite team and players
- More than 60 percent of fans say a great “year-round experience” would make them more likely to be more engaged with the team in the coming season, and 55 percent say it would make them more likely to purchase a ticket in the future

To further glean insight, the survey breaks down respondents, through self-identification, into three types of fans: casual fans, fans that love the game, and absolute fanatics. To little surprise, the survey reaffirms that fanatics engage and spend more than their casual counterparts, but also it identifies key patterns of behavior that can be leveraged to not only move fans up the ladder of fandom but also convert those fans to revenue streams. A casual fan may never turn into a fanatic who paints their face and attends every home game, but an off-season social media post about community involvement may convince them to buy a jersey or watch a few more games in the upcoming season.

Developing and framing a range of narratives for different consumers at varying levels of fandom is key. Shifts in content consumption and the explosion of social media mean that storytelling mechanisms are much more fragmented and complex today than in previous eras. Thirty years ago, there were only a handful of broadcast networks that consumers relied on for content, but today consumers have dozens of platforms from which to choose. This creates an environment where teams and leagues can personalize content with varying degrees of frequency and through different channels. Understanding the fan as an individual and optimizing the combination of frequency, content, and channel for each fan can be key to maximizing revenue streams.

Finding a *frequency* that clicks

While it is generally accepted that the intensity of fan interest subsides once the season ends, it doesn't completely disappear. Our survey results note that 65 percent of fans say they want some form of content or information at least monthly during the off-season.

As expected, fanatics engage at a much higher frequency than their casual and love-it counterparts, as seen in figure 1.

Also unsurprisingly, increased frequency of off-season consumption is correlated with higher fan spend. Across all fan types, those who engage only once a month in the off-season spend 40 percent more than fans who have no engagement in the off-season.

Identifying where to focus customer engagement activities in order to produce optimized financial outcomes requires some deeper analysis at the fan-type level. For instance, a casual fan who has an off-season engagement frequency that is higher than zero but less than monthly spends 52 percent more than the casual fan who has no off-season engagement. An example of this could be using team media properties to engage a casual fan, who may not even be aware the club produces content in the off-season.



Figure 1. Average frequency of off-season engagement by fan type

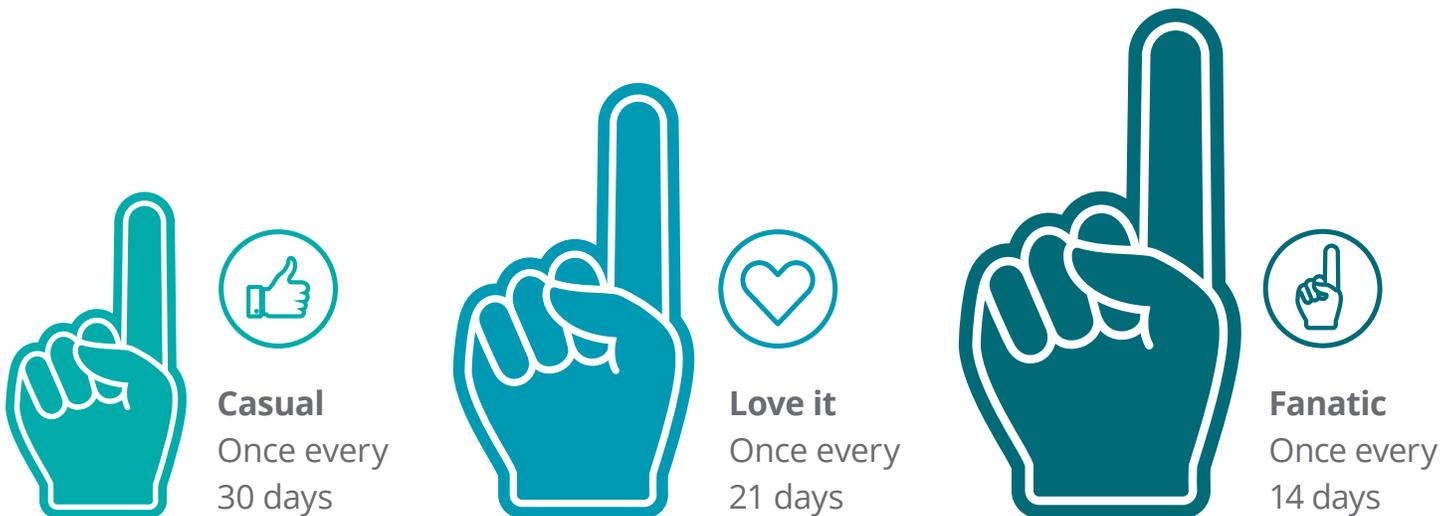
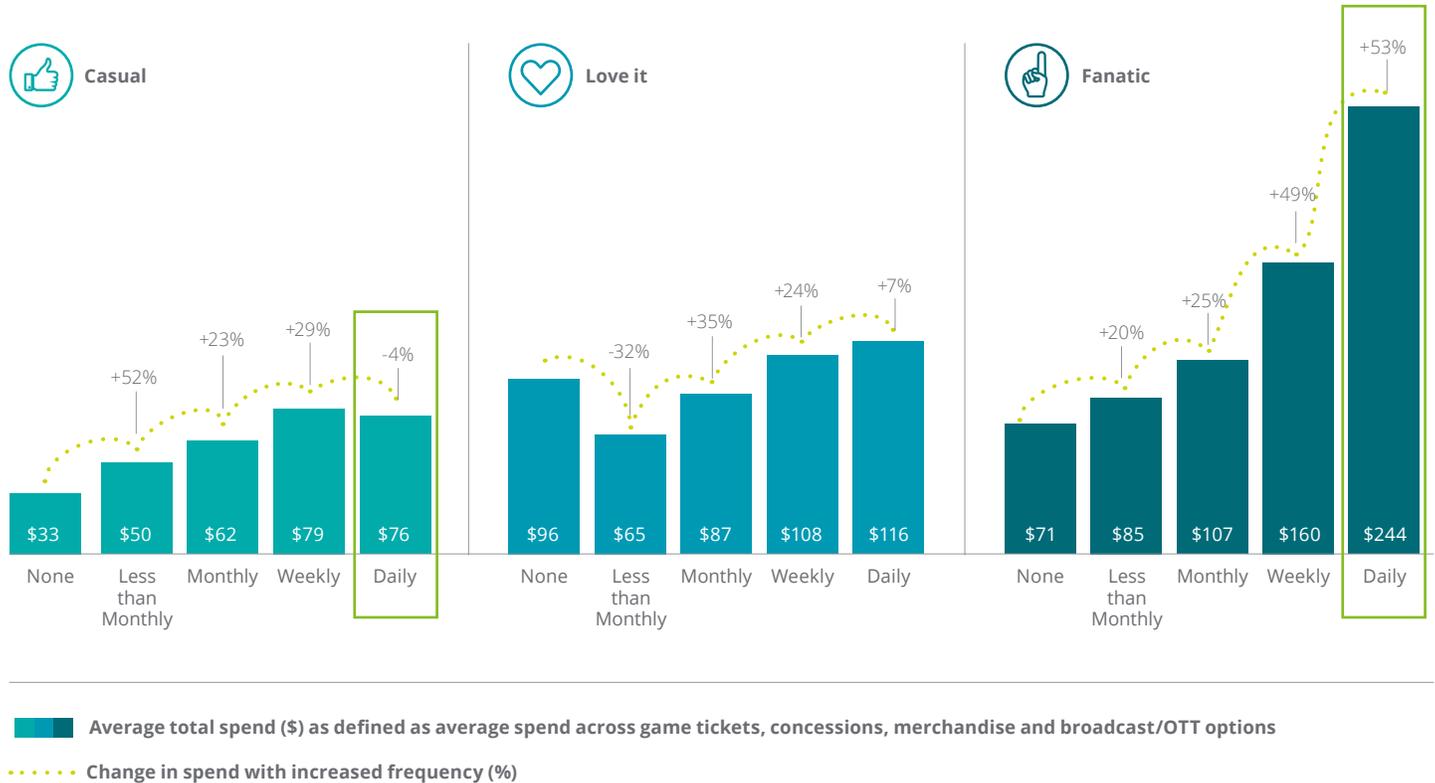


Figure 2. Change in average total spend by fan type as frequency of off-season engagement increases



Further, you can use segmentations such as fan type to be strategic about where and when you focus marketing efforts. Figure 2 summarizes the marginal return in average spend by increasing the frequency of off-season engagement for each fan type.

For instance, trying to ratchet up a casual fan's engagement frequency to daily could have potentially adverse effects because casual fans who engage daily in the off-season spend on average 4 percent less than casual fans who engage weekly in the off-season.

At the other end of the fan spectrum, a fanatic who engages daily spends 53 percent more than a fanatic who engages weekly. While casual fans may see daily notifications in the off-season as an annoyance, fanatics crave them. The key is to find the optimal frequency based on the profile of each individual fan.

Creating a connection with *content*

During the season, live game action is the most important content that teams can offer fans. But in the off-season, teams typically need to be creative with the media and content they produce for fans. Although the organic content faucet is turned off in the off-season, this reset can present an opportunity for teams to differentiate themselves through customized off-season experiences that drive revenue.

At the most basic level, many fans just want to keep current with their team during the off-season. General team news is the most popular type of content followed by news related to player/coach roster changes and injury updates. Despite the higher demand for basic content, it doesn't really "move the meter" when it comes to consumer spending. Instead, it's the more personalized and in-depth content that is most closely associated with higher spend.

Figure 3 highlights the percentage of total fans that consumed specific types of content and correlating average spend. It is intuitive that fans are more likely to consume content linked to off-field machinations (e.g., team news, transactions, injuries); however, it's important to point out that higher spending is related to on-field content (e.g., in-depth performance analysis), as well as content that goes beyond front offices and locker rooms (e.g., community involvement stories).

Additionally, our survey found that only 40 percent of fans find that the content they pay for is meeting their expectations, while they place an above-average-importance score on having quality content. This presents an opportunity for teams to offer premium content at a discount in order to increase the overall fan spend throughout the year.

Figure 3. Content consumption and correlated spend



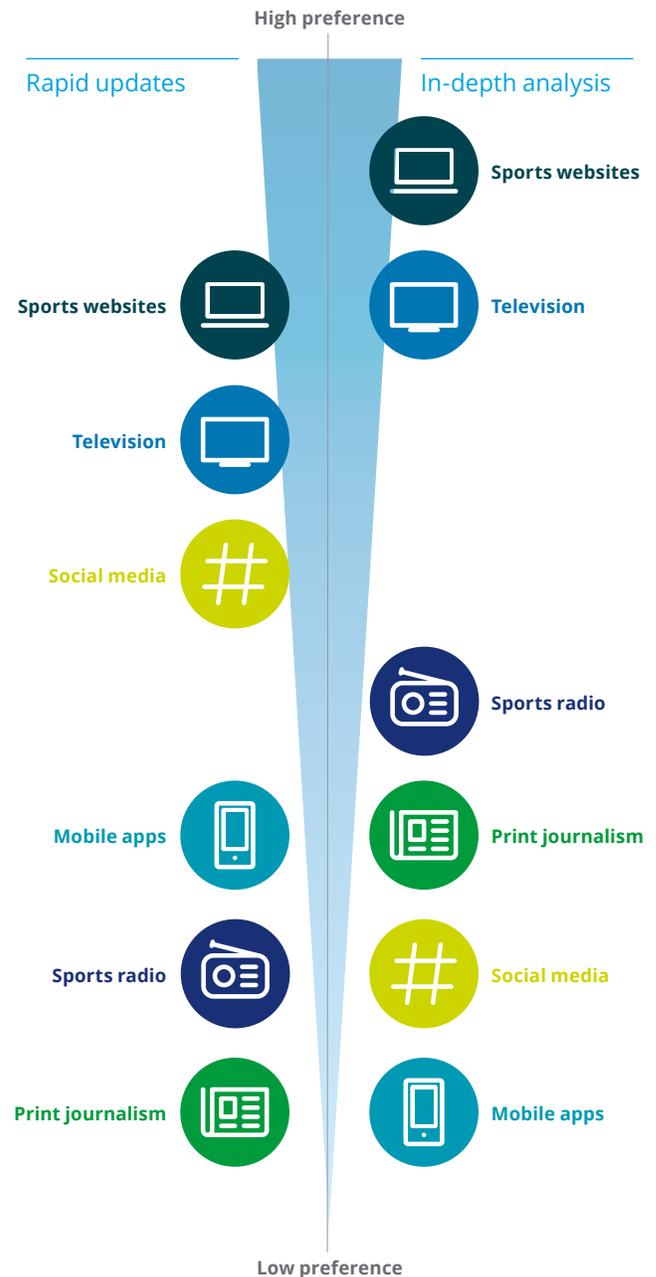
Picking your *channel* from a universe of options

In such a fragmented and competitive media landscape perhaps the biggest challenge for teams in executing fan engagement activities is identifying the most appropriate channel. There's a broad range from social media to broadcast, print to podcast and radio, and many more platforms fans use today. To navigate the current media landscape, teams should understand where fans are going to read, watch, listen, and interact with their favorite team.

Fans go to different channels depending on the content they're searching for. For comparison, we categorized informational needs into two groups: rapid update and in-depth analysis. When seeking rapid updates, fans prefer to use sports news websites, television, and social media. Sports news websites and television remain the top preference for fans when seeking in-depth analysis, but social media is significantly less preferred, with sports radio and traditional print journalism ranking higher. Figure 4 illustrates these preferences and how they change given the type of information fans are seeking.

In addition, our survey found that demographic elements such as age and gender can be telling indicators of channel preference. Baby Boomers are more interested in traditional channels than Millennials, who are more interested in social media, mobile apps, and streaming devices. Interestingly, females have a 41 percent higher preference for social media than their male counterparts.

Figure 4. Channel preference by content type

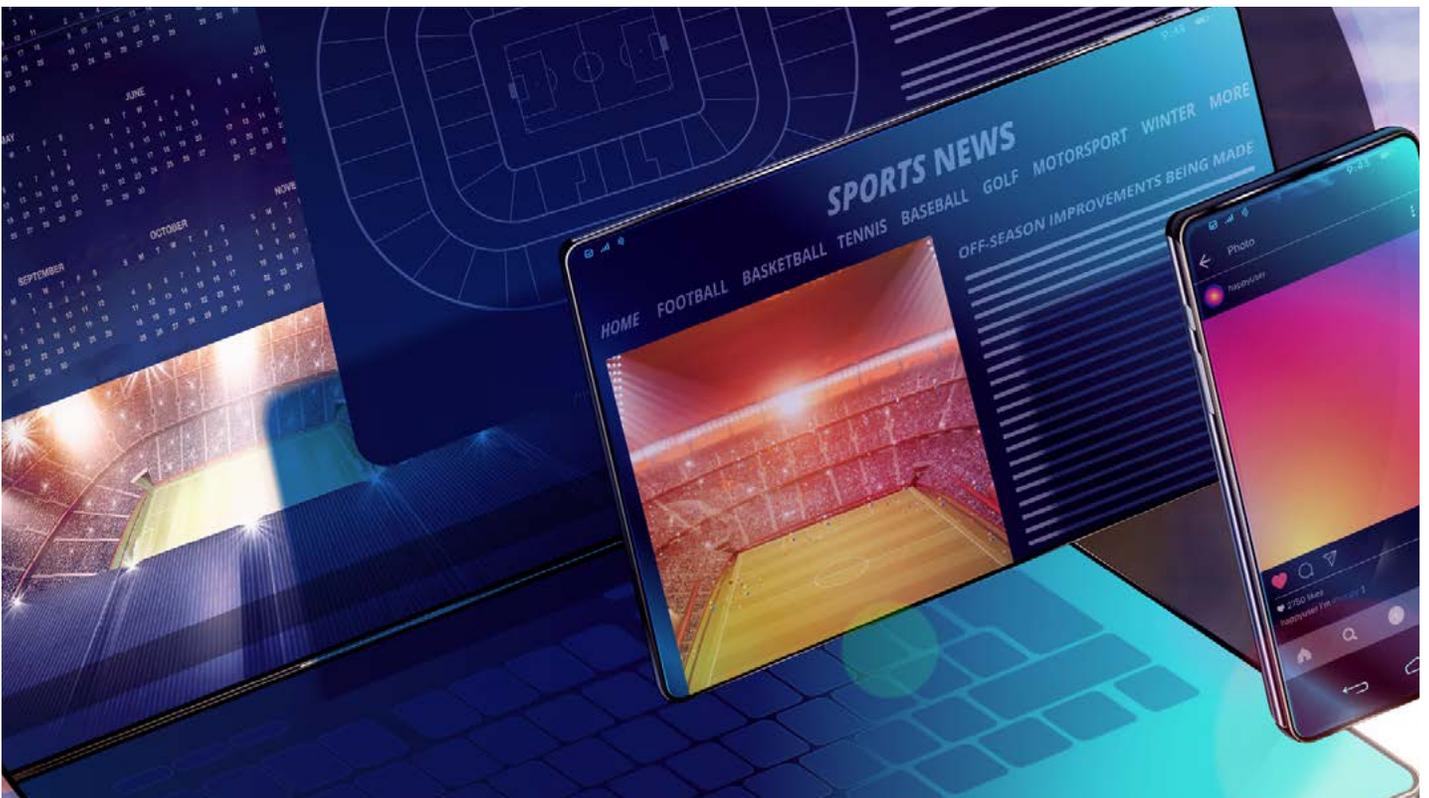


Conclusion

The sports season might be about wins and losses, but after the season is over, teams and leagues still have some plays and audibles to call to keep fans and consumers engaged.

More than 60 percent of fans say that having a great “year-round experience” would make them more likely to be more engaged with the team in the coming season—and 55 percent of fans say that it would make them more likely to purchase a ticket in the future. A challenge for teams is to recognize that each fan is different across a multitude of factors, and it’s important to develop a mixed marketing model that capitalizes on the differences across frequency, channel, and content.

The message is clear:
Maintaining year-round continuity
of fan engagement can generate
appreciable value.



In a league of their own

We saw several key differences across leagues in our survey with respect to year-round fan engagement:

- WNBA and MLS fans have the highest percentage of fans that are “very” or “extremely” satisfied with the overall year-round fan experience and are most likely to participate in off-season team-sponsored events.

	WNBA	MLS	NASCAR	NHL	NBA	MLB	NFL
Percent of fans that are “very” or “extremely” satisfied with the overall year-round fan experience	57%	50%	43%	41%	41%	38%	38%

- MLS and WNBA place 50 percent more importance on being able to receive updates through social media than fans of other leagues.
- NBA fans are not far behind in online social engagement as they place higher importance on being part of the online community than their MLB, NFL, and NHL counterparts.
- NHL fans have the highest preference of any league for using team-managed websites as their primary source for following their favorite teams.
- MLB fans utilize traditional media outlets, such as newspapers and radio, most frequently of any league.
- NFL fans place nearly 25 percent higher importance on consuming information related to fantasy sports and games than fans from other leagues.
- NASCAR fans have the third-highest overall satisfaction rating, but also they have the lowest frequency of engagement both during the season and off-season.



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