



USER FRIENDLY

User Friendly at CES: Sports & Fan Engagement

Host: Hanish Patel, User Friendly host and digital transformation leader, Deloitte Consulting LLP

Guests: Amy Choyne, chief marketing officer, USTA
Pete Giorgio, Deloitte's US sports practice leader

Hanish Patel: Fan experiences are shifting, there's new sports offerings, new fan bases, and new media solutions are coming to the forefront. Sports teams and leagues need to build their experience to cater to new fans and showcase the latest technology to attract more consumers. Yet much is still unknown about what drives fan preferences and how teams can compete with new sports leagues and other competitors for consumer attention. Amidst the shift in landscape, there is a hunger for guidance on meaningful and achievable fan engagement strategies and

sports offerings, to unlock value and enable future opportunities. Today we'll discuss how sports teams and leagues are unlocking value by better understanding the end-to-end fan preference. Joining me live from the Consumer Electronics Show 2019 are Amy Choyne, CMO of the US Tennis Association, and Pete Giorgio, leader of Deloitte's US Sports Practice. Amy, Pete, welcome to the show.

Pete Giorgio: Thank you.

Amy Choyne: Thank you.

Pete Giorgio: Great to be here, Hanish.

Hanish Patel: I think we can all understand the appeal of sports whether we're viewing in person or at home, but what does fan engagement mean in 2019?

Amy Choyne: For the USTA, it means a lot of different things because we define the fan for the fan and stadium on the property, people are consuming it on the mobile app who are off property, on .org or via broadcast. So from a fan engagement, we have different techniques and content

strategies to engage those fans in different levels. Our technology partners that we have across the board are helping us engage with the fans in different ways in the stadiums through technology like Hawkeye or Interactive Maps for grounds to have people navigate the site easier, and our online properties not only have great content to consume but more interactive AI-focused technologies as well.

Pete Giorgio: It's interesting because I do think, and the US Tennis is at the forefront of a lot of this, this idea that it's not just the fan who comes to the stadium anymore, it is that broad definition of fans of tennis, right, and how does the USTA as an organization build relationships with those individuals, give content, produce content for those individuals, create a two-way dialogue with those individuals on an ongoing basis, not just two weeks of the year anymore, three weeks of the year anymore.

Amy Choyne: Three weeks for the fan league.

Pete Giorgio: Exactly so, but year-round, what does that look like, and so we're seeing more and more organizations like the USTA really take that broader definition and really look at how do we create that year-round relationship?

Amy Choyne: Quickly to add to that point, you know what differentiates the USTA as well is the fact that we're the national governing body of tennis, so not only is the fan experience from watching tennis but we also want to convert the fan to a participant of tennis, and actively work them into that flow, so it's that engagement as well that we're working on.

Hanish Patel: Just touching upon what you both said there, it's not just the event, it's much more than that and all year round. Are there things in place that as me, as a fan, that can engage me while I'm on the way to the event, not just at the event, but also once I've left the event so it feels that it's a much more immersive experience and is beyond just the actual sporting event itself?

Amy Choyne: Well, we definitely have a robust communication plan when you're getting to the event to prepare them, to give them all the availabilities of food and beverage and dining and retail to prepare them to navigate the event itself, and then you do a lot of follow-up with them from a survey perspective to help us learn, as well as cater new ticket opportunities for them to come back, and then we also try to connect them to other tennis events throughout the year, so they could actively still participate in watching tennis as well as participate.

Pete Giorgio: I mean it's interesting because I do think there's a real push to connect, even when you're playing tennis, when you're out there hitting with a friend, how does the USTA become part of that conversation, right? How does, I don't know if you guys did it, when I was a kid, you know, I was Björn Borg, right, hitting those balls back and forth against the wall. It's an interesting challenge that Amy and the team has, is how do they tap into that as well? So it's even expanded beyond on the way to the open and on the way back, it's that broad, broad, broad definition of how they engage.

Hanish Patel: And we talked a little bit about in person and at home. Is there a totally different strategy for those that are at home, because obviously it's still not quite the same as being live, in person, on the way, coming back, et cetera, and is that a totally different strategy that, for example, for the USTA, what they're doing for those at home?

Amy Choyne: No, absolutely, I mean, if you're in property, there is the mobile app that you have there, in which we do push notifications if you're in a certain stadium, as well as leverage our Hawkeye data to give them real-time information of points that are happening on different courts. If you are consuming it at home or on .org from a .org perspective about 57 percent of our viewers there are from international, so there are content that is catered to geo-targeted areas to give them relevant information so that is a more personalized experience, and then we work with our respective broadcasters who people are actually viewing it at home to give them content that they are able to



use within their programming to not only educate them on the US Open. We had an opportunity last year, for example, that it was the 50th anniversary so we had our robust content schedule in which we gave these vignettes to our partners for them to integrate into their programming, so it's definitely a catered unique experience for each of those people.

Hanish Patel: And talking about that experience, how do you think that fan engagement fan experiences has changed over the years, and what are organizations like yourself and other big sporting providers doing to make sure that fans stay continually connected?

Amy Choyné: Well, we listen to the fans, first and foremost, and a big significant push that we had, it was our second year, was mobile ticketing, and we worked with Ticketmaster on that, and it actually, where it's able to give us more information about the ticket buyers, especially in the secondary market. From a Ticketmaster standpoint, you have to transfer that ticket via the mobile app, so now we have more information of the people that are actually in the seats, so we can then cater emails and push notifications to them to make sure that we are servicing them, and then from a future perspective, we could, we have surprise and delight customers for seat upgrades, because we know this information, and a future look is wait times for concession stands and stuff like that.

Hanish Patel: Right, expanded upon that, Pete, I'd love to talk about how you're seeing social have a big play in that and ambassadors for the sport, for the organization, and where that sort of ties in around engagement as well?

Pete Giorgio: Yes, no, it's been a big part of what Amy has been doing, but honestly it's happening in all sports. Social is one of the biggest channels for organizations, for athletes, for leagues, for teams, for organizations like the USTA to engage with people who follow their sport, who are fans of their sport, fans of the event. I don't know if, Amy, you want to talk a little bit about Net Generation, and the USTA as the governing

body has this great program to engage youth, right, and how do we think about building that next generation of fans, and social is a big part of that.

Amy Choyné: Yes, we have a significant social media campaign for both the US Open and the USTA channels, and as Pete mentioned, Net Generation, which is our official youth tennis program for the USTA, we have about 100 Net Generation kid ambassadors that all have pretty robust Instagram accounts, and they post content on our behalf, we have different topics that they need to actually comment on, we actually just hosted them all at our national campus down in Orlando, which is our fabulous 100-court facility for a program with them, and we had them and their parents down to play tennis with player development, to get a taste, and it was a really fantastic approach, and we really found that that authentic communication with their audiences talking about tennis is a really great approach other than traditional media.

Hanish Patel: Well, it sounds like you need an adult version for Pete and I to sign up to.

Amy Choyné: To that point, we are working on that so stay tuned. Tennis 2020, we have a lot of new adult programming coming out beyond the USTA leagues, I mean, social play is incredibly important to us. Cardio tennis is a great way to get introduction into the sport, and it's something that we're investing heavily in next year, so we're excited to integrate that into our programming and promote it.

Pete Giorgio: One of my favorite things about the USTA, I forget what it is, there's a book in the building at the USTA that every year they have a champion for like the over-90 division or over 85 or like literally like 80-, 90-year-old players who are competing and are the USTA recognized champion every year.

Hanish Patel:

So that's fantastic, and it goes back to what both of you are saying about, it's not just the event, right, it's all year-round, all ages, that we're trying to get that engagement for.

Pete Giorgio: I want to touch, though, on something that Amy said earlier that I think is important, especially in the social world, it's that she chose the word *authentic authenticity*, and that's I think more and more what a lot of sports organizations are seeing in terms of they need to show up in that very authentic way. When sports organizations first started embracing social, they really just looked at it as another broadcast channel, right? As another way to sort of get information or get their message out, and what you're seeing is an evolution, and this is a great example, what Amy is doing at the USTA is how do you really engage with folks that are more of a basic level, that authentic story, that pulling them into what you're trying to do and make them feel like they're part of it, not just sort of understand who's won a match and what's going on and these different things, and it's something we're seeing across the board.

Amy Choyné: Yes, one of the great programs that we have as ambassadors that worked quite well was the trick shot challenge. We actually partner with a lot of the pro athletes and they did a trick shot video and then we challenge our audiences via Net Generation to actually challenge each other, and it did tremendously well. Another great thing that we did leveraging also, because something that's really big that we try to do is we leverage our pro and access, particularly obviously the US Open, to promote the sport of tennis, and we partnered with Del Potro actually and did a call with a NASA astronaut who happened to be in space, and we did the first tennis match in space live broadcasted at the US Open last year. So we are really trying to develop this kind of authentic interesting content that expands the audience of people that not normally would be thinking about tennis.

Hanish Patel: That's fantastic, and in particular, as you're lining up with top ten players and pro athletes that the fans are following those athletes, but then if you're lined up as an organization with them then that's going to be so much more magnified in terms of what you guys are doing as well.

Amy Choyne: No, absolutely, I mean, the pro athletes really want to give back to growing the sport, and they're a pleasure to work with.

Hanish Patel: I have to take us to CES because we here, we're live on the show, and it would be remiss of me if I didn't talk about all the consumer trends that we're also seeing, so I'd love to get your thoughts on how consumers are actually shaping the way, you talked a fair bit about the technology, what the USTA are doing, but how are we as just fans and consumers actually changing the way that we view and engage with sports, individuals and teams and leagues?

Amy Choyne: Content is key, and I think that understanding where all of the fans and viewers are actually consuming content and coming up with different original content programs for those respective channels is incredibly important because we have to go where the fans are. Social obviously has been changing the landscape of that beyond just linear television, and we try to give them kind of unique highlights and things of quick speed so that's incredibly important and then obviously the experience in stadium and leveraging Artificial Intelligence, as well as plays on court is incredibly important.

Pete Giorgio: I think the other really cool thing, especially in the tennis world, is on the sport tech side, too, in terms of all the companies that are really doing some interesting things with rackets, with the USTA has a great partner down in Orlando that actually has a visual system that will track balls that are in and out and give you ball speed.

Amy Choyne: Play Sight, yes.

Pete Giorgio: Play Sight, yes, that sort of really tracks, so we're seeing a lot of really interesting, and just walking around here, we're seeing a lot of different places that are really sort of digging into these different parts, I mean there is stuff that people are putting in shoes to understand is your weight shift correct in terms of how you, what you're doing, and I think it's interesting to see how all of that is actually going to

help you and I, right, become actually better tennis players, right, in a way that we would have to 10, 15 years ago, we would have to go get a professional coach to get, right, that is now available in new and different ways, and I think it's going to become even more and more available as we continue to go.

Hanish Patel: And you think that's permeated down from the pro athletes themselves in terms of them getting that edge and now, as we said, becoming more consumers so we as budding tennis fans can actually get better playing through those monitoring devices, et cetera, to see how bad or good our backhand is, for example?

Pete Giorgio: I think it's both actually, I think actually, I think we will benefit, but I think you guys are using it a lot with the pro athletes as well, a lot of these new tools as they sort of think about, one of, part of what the US, really interesting that the USTA does is in some ways they take responsibility or maybe not complete responsibility, but thinking about what's the next generation of great American tennis players and how do they participate in that too so.

Amy Choyne: No, it's incredibly important to us and down in Orlando we have our player development led by Martin Blackman, and to Pete's point, he does rely heavily on analytics and data and using all of those mechanisms to understand how to increase the athlete's performance.

Hanish Patel: And also that data even if it's just a fan at home is immensely useful in between a set, in between a game, and you kind of seeing percentage points, et cetera, in a way we're actually starting to see, well, if a certain server got an X percent in their first serve, they're likelier to win the game. All of those over the years have been phenomenal for just for viewers as well, in terms of the use of those analytics.

Pete Giorgio: I think it's really interesting too all of the fan data that we have now too, right, not just folks who are at the Open but just generally. I mean, Amy has got a great database of tennis coaches and kids who play, and parents, and does a lot of work to sort of connect all those things, and I

think you'll see more and more as that data becomes available, as people understand the importance of that data, folks like the USTA leveraging that to actually grow the sport, to actually use that data, use that information to figure out where and how there's opportunities to play, to connect people with those opportunities. There's a lot of really interesting things that I think that we will see in the next few years and how that data gets used to drive that.

Amy Choyne: And something that's been incredibly important to the USTA for the last couple of years in our quest for digital transformation is that holistic view of the customer, or the fan, whether it's the fan, the provider, or the player, it's something that we had limited view of a couple of years ago, so, it's, we're heavily investing in it and we're going to use that obviously to engage both the fan and participation.

Hanish Patel: So let's shift gears a little, right, and talk about stadiums. In many ways in-person events are certainly evolving, right, and when you envision stadiums of the future, specifically, Amy, I'd love to understand what the USTA have been working on in terms of that digital ticket initiative, and if you could tell us a little bit more about that, I'd love to know more.

Amy Choyne: So, it was about two years ago we partnered with Ticketmaster to get rid of the traditional ticket, if you're a box seat you still get the beautiful ticket that we do theme art on, because I'm a marketer at heart and I would never get rid of that, but you have to use the mobile tickets. It was a little bit of a challenge the first year, but it was very smooth last year, and with that information we now know exactly who the person is, where they're sitting, sometimes even age demographics, and to Pete's point, eventually we'll probably know, based on our data league information, okay, this person plays tennis, and their kids play tennis, so we can then cater the mobile app experience to them while they're in stadium directly about that, which is great. And then we've been doing a lot of surprise and delights for seat upgrades, and we can give them push notifications right there on their app to communicate with them, so that has been

wildly successful as well. We have done a lot of fan cam fun activations via the mobile app and, again, we know all this about these people because of the mobile ticket. It really has opened up that box for us.

Hanish Patel: So tell me a bit more about just the experience beyond the beauty of the game and tennis itself, what are you doing in terms of just the whole experience for the individual attending?

Amy Choyne: So, the US Open, tennis is one part of it, it's the grandest stage, we like to say, and a spectacular event, obviously one of the highest if not the highest-grossing event in America from a sports perspective. When you come on property, you could consume tennis in any way you want, it's different than going to one stadium where you're only in the stadium watching a football game, you can walk around we have 20 different courts and three huge stadiums in which you have access to with your ticket. There is fine dining, there is fantastic cocktails, there's sponsor activations in which get you on to the court, and so we're heavily promoting that and then a new initiative that we're working on, the US Open is from a main draw perspective, a two-week event but the qualifying week is kind of the best - kept secret of tennis, in my opinion, because it's a free event, and it's the first week and it's the fourth - largest tournament in America and no one really knows that. So we've rebranded it fan week as a giveback to our fans, and we are peppering it and have been for the last two years and are making a more significant push in 2019 with player practices. So you could watch Roger playing for free on the grandstand or Serena playing in Ashe and we're going to have some concert series there, and we're really trying to, as a giveback to the community, get people there. Obviously we want them to come back, but it is significant, important, the thing we're working on for next year.

Pete Giorgio: It is an experience, I still, my very first US Open I ever went to when we first started working with these guys three or four years ago, I remember standing there and it was, I had my back to this fence and all of a sudden I heard some people playing and I was like, I wonder who is playing and I

kind of look in there and it was Serena and Venus practicing against each other.

Amy Choyne: Yes, you can get really, really up close and personal, I mean, that's the beauty of it.

Pete Giorgio: Just like I was in like my local tennis court in my neighborhood. It was crazy.

Hanish Patel: Excuse the pause, I'm just making a note in my calendar for fan week after hearing that. Wow, I did not know about that, but I certainly do and it sounds a lot of our listeners are now going to know about fan week as well, so that's maybe not the best - kept secret anymore.

Amy Choyne: That's okay with me.

Hanish Patel: That's brilliant, I mean, that's wonderful, if I think about the engagement you've got for a tennis fan like myself, but all of those things beyond that, what are you doing for those sitting at home, the chair fan, how do they get the personalization, how do they get the interaction viewing the game?

Amy Choyne: Well, obviously with their broadcaster and content that we're partnering with the respective broadcasters on, we give them behind the scenes of what's happening at the Open itself and work with tremendous partners in an editing perspective to come up with unique content for them, and you can use the mobile app at home, so future thinking, you could have your mobile app and you could say if you're using it at home versus in the property, so it will have a different look and feel and .org as well, we have a bot there that you can communicate with and learn more on your personal kind of questions.

Hanish Patel: Brilliant, and, Pete, your thoughts on that in terms of some of those technologies that you're seeing from an entertainment perspective coming into the home as well?

Pete Giorgio: Yes, I mean, the interesting thing too, and Amy and crew at the USTA do

a great job with their broadcast partner just on the streaming side, right, just that the match is being available, because interesting thing about the Open, too, is typically you end up focusing on one or two matches a day, but especially in the first week there is, I don't know how many matches.

Amy Choyne: It's tremendous more yes.

Pete Giorgio: And there is a ton of great tennis, I mean, literally superstars in the making playing each other and so getting a lot of the new streaming options, a lot of that content is now available in a way that it just wasn't available back in the sort of linear broadcast days, as well as great events like another best - kept secret, I think, at the Open is wheelchair tennis, right? I don't know if you ever watched wheelchair tennis, it's amazing.

Amy Choyne: It's fantastic.

Pete Giorgio: It's astounding. To be honest, I mean, I have nothing against Venus and Roger and those guys, but the wheelchair guys are tremendous athletes. Imagine trying to play tennis in a wheelchair at the same time, right? And all of that is available to and sort of new in different ways, but I also, I do think we'd be remiss, it is about the event, it is about the US Open, but Amy and crew, they've got, I mean, if you want to find a coach for your kids for tennis, go to USTA, right, they've got tools and things that you can use to do that, to engage in the game more broadly too, which I think is the really cool part. It's not, the event is a big part of it, but it's also about the game, which is important.

Hanish Patel: Right, brilliant, so I want to move to a bit more of a personal note, and you guys kind of touched upon some of that fan week and the experience you got with Serena and Venus, but what would you say is your most memorable sporting event?

Amy Choyne: I'll have to choose tennis, won't I?

Hanish Patel: But which one specifically?

Amy Choyne: I'll choose one actually from, that actually just happened last year, because it was such a fantastic match to be a witness to, which was the Nadal-Thiem match, which was a quarterfinal and it was five sets, and the last two were tiebreakers, and not only was it fantastic tennis from like watching these athletes play but afterwards when Nadal won, he literally jumped over the net to hug him, and that sportsmanship was just amazing to watch. And then from a fan, I was actually in the stadium, and everyone was standing up clapping because not only the fantastic match, probably also because it was very hot and they didn't want to sit more, but because of that great energy, so for me that is a highlight.

Pete Giorgio: Two years ago, I think it was two years ago or three years ago, I forget who she was playing, but Madison Keys is a tremendous American female player, she had a match where she—they just—I mean it was rally after rally after rally, and it was

one of the first times I'd actually been to a live tennis event for me, I'd seen plenty on TV, and just the sheer power and I hate to say ferocity of these players playing against each other and the sort of intense focus. I remember it just imprinted on me in a way that I was like, okay, these guys are for real, like this is very cool.

Hanish Patel: Brilliant, so with that I'd love to thank both of you for coming on to the podcast. This has been incredibly insightful and, for me personally, I'm signed up for fan week already for this year coming forward, but I think for our audience, it's going to be really interesting for them to understand so much more about what the USTA are doing just beyond the sporting event itself and the experiences they can have, so Amy, thank you, Pete, thank you for being on today.

Amy Choyne: It was a pleasure.

Pete Giorgio: And it was great. Thanks for having us.

Hanish Patel: Sports and entertainment leaders have long understood the importance of atmosphere and excitement in keeping fans happy and engaged. Fan engagement is central to driving fans to stadiums, convincing them to spend money on their favorite teams and leagues, and developing bonds strong enough to push a fan from the first event to a lifelong attachment. I want to thank my guests Amy Choyne and Pete Giorgio for joining me today. Until next time, happy listening.

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