Topic: Key Enablers of an Awesome Fan Experience
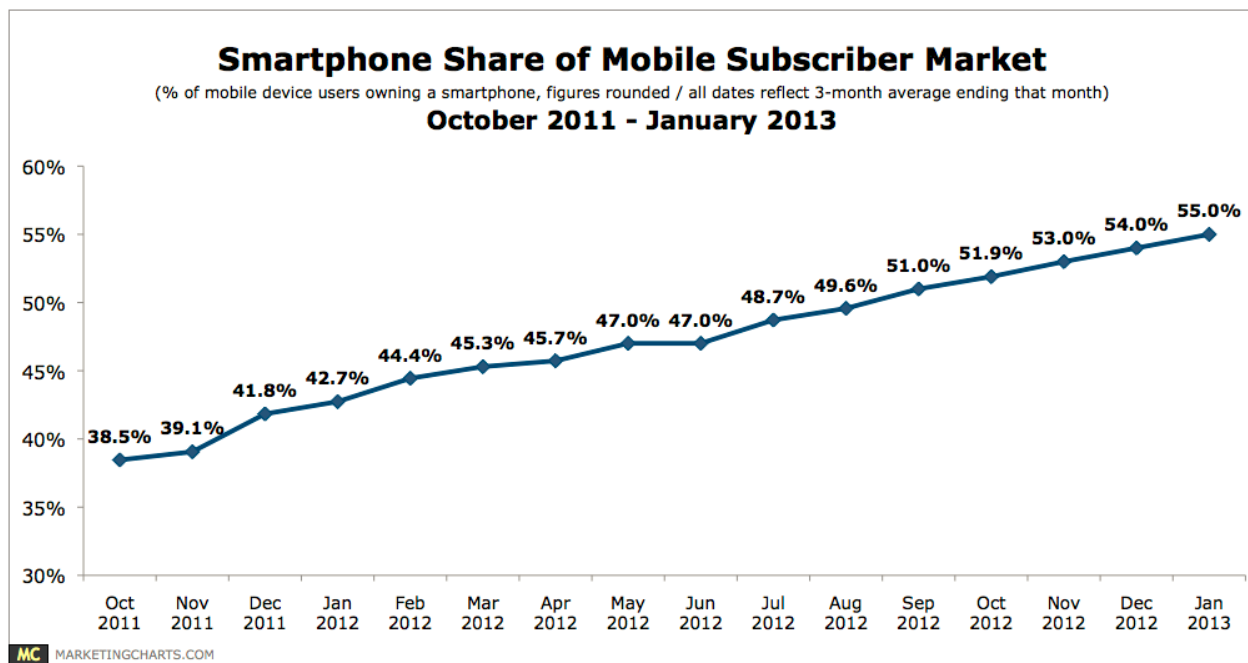
Overview:

The sports fan is expecting, and in many ways demanding more engagement in the game-day experience. This goes well beyond allowing tail-gaiting and having clean bathrooms. Many current elements of the fan's game-day experience, such as easy customer service access, in-seat ordering service, and local menu items are now considered mandatory and basic costs of doing business.

Advances in personal technologies, mainly Smartphone penetration and usage, Social Media, and Rapid Increases in Wireless Bandwidth, are changing the shape and context of daily living.

Below are some statistics on how they're impacting the fan's experience, along with IMS implications.

Smartphone Penetration – A Must Have Device:
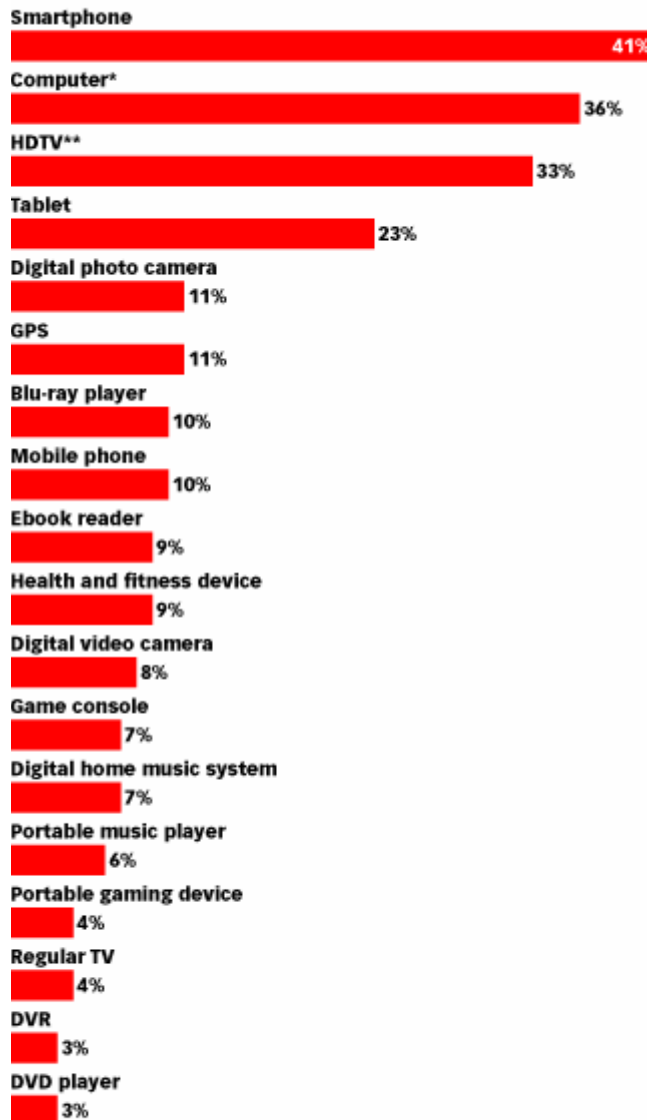
Explosion in Smartphone Penetration:

Smartphone Share of Mobile Subscriber Market
(% of mobile device users owning a smartphone, figures rounded / all dates reflect 3-month average ending that month)
October 2011 - January 2013

Source: comScore

Smartphone Penetration is Expected To Grow:

Consumer Electronics that Internet Users Worldwide Plan to Purchase, Oct 2012

% of respondents

Device	%
Smartphone	41%
Computer*	36%
HDTV**	33%
Tablet	23%
Digital photo camera	11%
GPS	11%
Blu-ray player	10%
Mobile phone	10%
Ebook reader	9%
Health and fitness device	9%
Digital video camera	8%
Game console	7%
Digital home music system	7%
Portable music player	6%
Portable gaming device	4%
Regular TV	4%
DVR	3%
DVD player	3%

Note: n=11,101 ages 18+; in the next 12 months; Brazil, China, France, Germany, India, Japan, Russia, South Africa, Sweden, UK and US; *includes desktop, laptop, netbook and ultrabook; **includes HDTV and 3-D TV
Source: Accenture, "It's Anyone's Game in the Consumer Electronics Playing Field: The 2013 Accenture Consumer Electronics Products and Services Usage Report," Jan 7, 2013
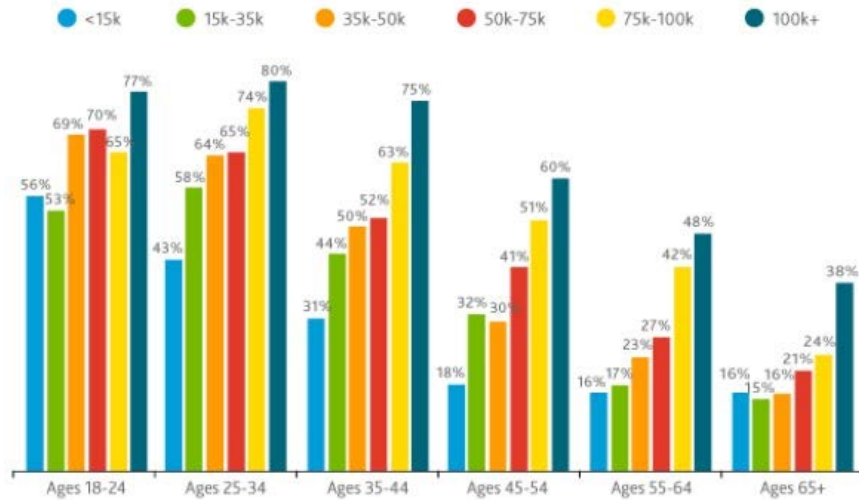
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Age and Income Drive Smartphone Adoption:

Smartphone Penetration by Age and Income
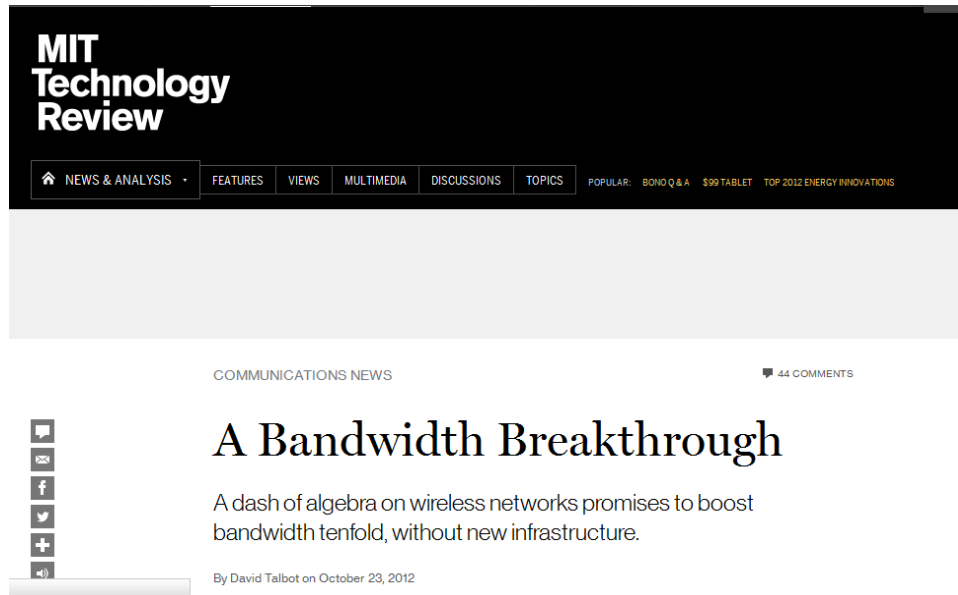January 2012

Source: Nielsen

nielsen

Cisco Expects Continued Growth In Mobile Connection Speeds:

Table 4. Projected Average Mobile Network Connection Speeds (in kbps) by Region and Country

	2010	2011	2012	2013	2014	2015	2016	CAGR 2011-2016
Global								
Global speed: All handsets	189	315	504	792	1,236	1,908	2,873	56%
Global speed: Smartphones	968	1,344	1,829	2,425	3,166	4,102	5,244	31%
By Region								
Asia Pacific	219	337	497	732	1,101	1,697	2,608	51%
Latin America	50	125	227	396	673	1,082	1,627	67%
North America	596	1,138	1,712	2,485	3,531	4,923	6,785	43%
Western Europe	431	667	1,196	1,967	2,960	4,163	5,549	53%
Central and Eastern Europe	126	205	396	739	1,316	2,228	3,476	76%
Middle East and Africa	52	89	206	434	850	1,555	2,618	97%

Source: Cisco VNI Mobile, 2012

New Approaches Are Increasing Bandwidth:

Smartphone Usage Continues To Explode:

Figure 5: Most Frequently Used Devices

Of the consumer electronics devices you currently own, please rank the top five that you use most often.

Top five products used in 2012 and percentage point change from 2010 to 2012.

Device	Value	Change
PC	91%	+2
HDTV	55%	+8
Smartphone	55%	+30
Tablet	17%	+14
eBook reader	6%	+5
Game console	13%	+4
GPS	12%	+1
Blu-Ray DVD player	9%	+4
Basic mobile	50%	-17
Digital photo camera	36%	-15
Regular TV	33%	-8
Portable music player	17%	-4
DVD player	15%	-15
Health and fitness device	7%	-2
Digital video camera	5%	-2
Portable gaming device	5%	-3
DVR	5%	-5

Significant level or growth in usage

Increase between 2010 and 2012
Decrease between 2010 and 2012

Sample base: Total sample (US, Japan, Germany, France, China and India)

2010: 6,001
2012: 6,057

Source: The 2011 and 2013 Accenture Consumer Electronics Products and Services Usage Reports

(Source: Accenture 2013 Consumer Electronics Report)

Social Media & Uploading Photos Are Top Smartphone Uses:

How Americans Use Their Cell Phones — Specific Activities

% of adults in each group who use their cell phone to do the following activities
(Example of how to read this chart: 77% of smartphone owners — and 45% of all adult cell owners — use their phone to check weather reports or forecasts)

	% ever do this		% do this on a typical day	
	All cell owners	Smartphone owners	All cell owners	Smartphone owners
Check weather reports and forecasts	45%	77%	28%	52%
Use a social networking site	40	68	28	50
Get turn-by-turn navigation or directions while driving	37	65	8	15
Get news online	37	64	19	36
Play a game	36	64	20	37
Upload photos online so that others can see them	34	58	8	15
Listen to an online radio or music service, such as Pandora or Spotify	29	53	11	22
Check your bank balance or do any online banking	24	44	11	21
Visit a local, state or federal government website	17	31	3	6
Get coupons on deals to use at local businesses	14	24	3	5
Use Twitter	9	16	5	10
Watch movies or TV shows through a paid subscription service, like Netflix or Hulu Plus	8	15	2	4

Source: Pew Research Center's Internet & American Life Project, March 15-April 3, 2012 Tracking survey. N=2,254 adults ages 18 and older, including 903 interviews conducted on respondent's cell phone. Margin of error is +/-2.6 percentage points based on cell phone owners (n=1954).

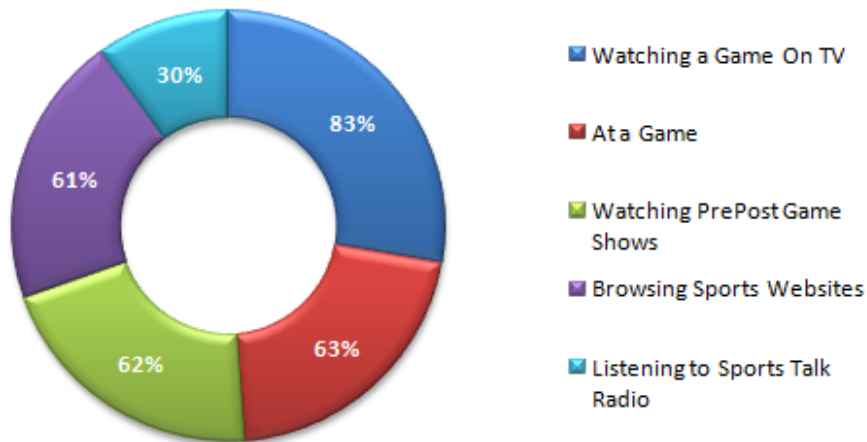*Sports Fans Are Tablet and Smartphone Multi-taskers:*
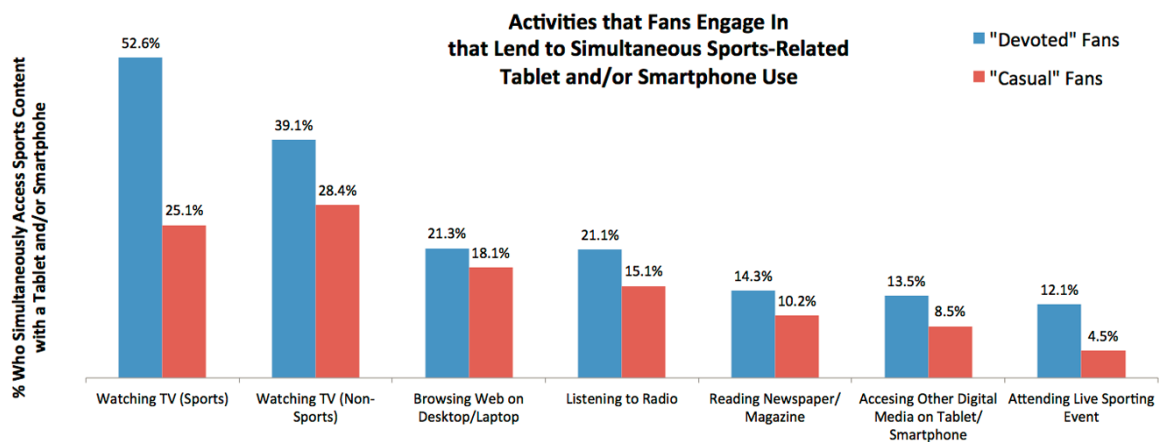
(Source: Burst Media, Sports Fans and Digital Media A Scorecard on Preferences and Behaviors September 2012).

Tablets and Smartphones Are Emerging As Sports Content Consumption Platforms*. Among all sports fans, 31.6% use tablets and 45.7% use smartphones to access online sports content and video at least occasionally.

*(Source: Burst Media, Sports Fans and Digital Media A Scorecard on Preferences and Behaviors September 2012).
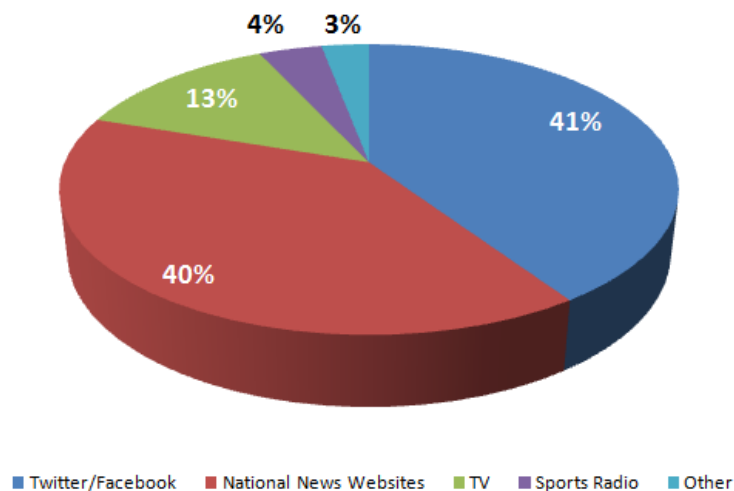
Impact of Social Media on the Fan

Fans Engage In Social Media during Other Sports Related Activities:

- 83% — Watching a Game On TV
- 63% — At a Game
- 62% — Watching PrePost Game Shows
- 61% — Browsing Sports Websites
- 30% — Listening to Sports Talk Radio

(Source: GMR Marketing, February 2012).

Fans Turn To Social Media for Sports Content:

- 41% — Twitter/Facebook
- 40% — National News Websites
- 13% — TV
- 4% — Sports Radio
- 3% — Other

(Source: GMR Marketing, February 2012).

So what's this mean for your fan engagement strategies?

Observations:

- Smartphone adoption and usage is not a "trend". Smartphones and mobile devices in general are becoming an integral part of people's daily lives.
- Smartphone usage should increase with the increase in data speeds.
- Social Media continues to be a major use point of mobile devices.
- Visual (photos, videos) engagement is growing with the increase in bandwidth (e.g., Instagram).
- The use of mobile devices and social media to enhance and deepen the fan's relationship with their favorite teams and sports, both in-game and out, is growing.

Implications:

- Your Promotions and Data Integration Platform, as well as POS Systems, must enable real-time fan engagement.
- Your Promotions Platform must be able to deliver and redeem incentives, rewards and promotional value in-game and in real-time.
- Your Promotions Platform must be able to deliver a variety of value types; e.g. dollar, item, progressive, even social value; through multiple fan identifiers, including mobile.
- POS systems must be able to run on a variety of mobile hardware and operating systems.
- POS systems must be able to redeem value via multiple fan identifiers, including mobile.
- POS data must be accessible in real-time.
- Flexible inventory management is more critical than ever –and data insight dependant.
- Data, Systems and Application integration must be fan-centric and built on an open architecture.
- POS and integrated systems data must be fan-centric and accessible in real-time.

Improvements in technology are only enablers to fulfill deeper motivational drivers. See our "Key Motivators of an Awesome Fan Experience" to learn more.