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Football Fan Experience

The perspective of Serie A fans: how the football ecosystem can capture the untapped potential

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MAKING AN IMPACT THAT MATTERS since 1845

Contents

Executive Summary

Today the football world, especially in Italy, experiences many challenges, not just concerning the sporting and financial performances of the football Clubs. Indeed, the transformations in **football fan behaviors** are taking **center stage** too. Football fans, like consumers in general, are changing and demanding new ways of relating to and engaging with their team. Digital technology, sustainability, new consumption patterns, and expectations are changing the landscape with which football Clubs must contend today and in the coming years.

Deloitte's "**Football Fan Experience**" research aims to monitor the sentiment of football fans about the recent developments in the football world, capturing new trends that football Clubs must consider to offer fans an immersive experience that responds to their needs and expectations and providing Clubs with insights with possible implications from a business perspective.

This first edition of the research reveals a significant potential that football Clubs competing in Serie A – Italy's Premier League – can unlock. This potential originates from the propensity of fans to increase their spending if their Clubs commit to **new investments in strategic assets**, such as the Stadium or Training Centers. Indeed, Clubs can achieve significant economic benefits through initiatives that aim to upgrade their infrastructure, which is in keeping with the broader vision currently emerging among fans concerning the football experience. Focusing only on the "passionate" fans - a segment that accounts for a relevant but still partial slice of the pie - is no longer enough. It is imperative to engage the entire fanbase, which also includes **more original and less involved individuals** who show their interest in football in new ways and are hardly persuaded by more traditional marketing strategies.

The **picture of Serie A fans** emerging from this study is quite diverse. Many fans' expectations and choices rely on their attachment to this sport, its culture, and its values. Although fans typically approach football and their favorite team through a family member – as 39% of respondents state – as the relationship evolves, it can take different forms depending on different attitudes and needs. Hence, there are several types of fans, each with different nuances and features. According to Deloitte's study, 43% of Italian Serie A fans experience a **strong attachment to their favorite team**; among them, young people and men tend to be more devoted to their favorite Club, while the more "placid" supporters include mainly women and those over 65.

Different levels of intensity in the attachment to their team translate into different fans' approaches to the game rules, the Club, its contents, and its initiatives. For example, the more loyal fans follow every aspect of the daily life of their favorite football team beyond what happens on the pitch: they want to **maximize their touchpoints** with the Club in as many ways as possible, from digital channels to the Stadium and Training Centers. On the other hand, "less involved" fans show an interest in other aspects related to their favorite team: that includes Clubs that offer **new spaces or initiatives beyond the match day**, such as providing young people with access to Training Centers to participate in summer camps or organizing events with a social impact for the community.

The variety of fan profiles also affects the attitude toward the Stadium experience and attendance rates. The more loyal fans love going to the Stadium, frequently attend their Club's home matches, and say they are overall satisfied with their experience. "Less involved" fans more rarely go to the Stadium, with those who have gone at least once expressing an overall lower level of satisfaction. However, each type of fan points out possible areas of improvement and new spaces/services that could enrich their experience inside the Stadium (food and beverages areas, Club museum, hotels, etc.).

Moreover, Serie A fans have a shared view of the future of football in the mid-long term. They call on their Clubs to pay more attention to the educational dimension of sport, **the environmental and sustainability impacts**, and the use of digital technologies to improve the game and add value to the touchpoints with their Clubs. In addition, the Metaverse has started to gain its place in football fans' future expectations. However, its impact remains limited: almost 1 in 3 fans wish to increase their involvement by accessing a **virtual Stadium**, although the share rises significantly in the case of younger people.

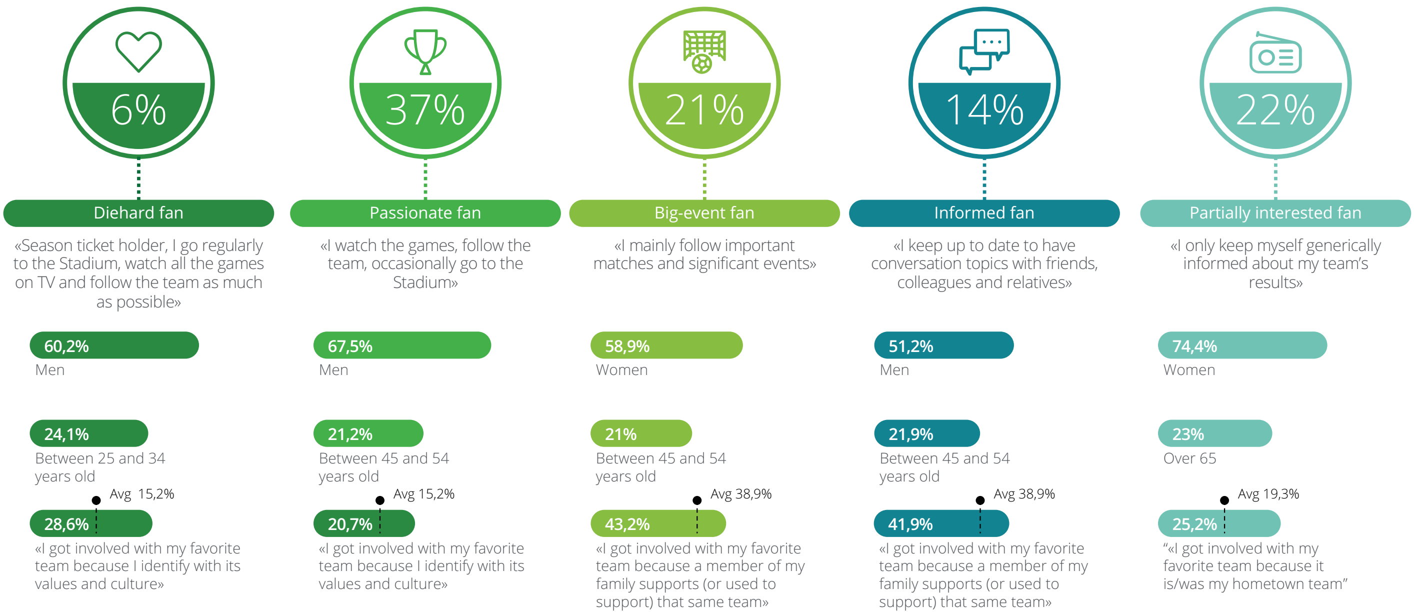
Therefore, the research identifies five primary needs of the Italian Serie A fans as key takeaways that, if appropriately addressed, can enable football Clubs to unlock their business potential further. Meeting these needs implies a 360° business model transformation - namely **contents**, **channels**, and **service models -** and requires a strong involvement at the Club level as part of a systemic effort involving the main industry stakeholders.

Fans, Their Love For Football and Its Values

43% of Serie A fans show a strong attachment to their team. Among them, young people and men tend to be more devoted to their favorite Club, while the more "placid" supporters include mainly women and those over 65.

There is no such thing as just one kind of fan. Supporting and rooting for a football team can come in different tones and degrees of intensity: from those who strongly believe in their team and would follow it anywhere to those who think this sport primarily has an entertainment and social dimension. Indeed, football is considered not only a game and an expression of sportsmanship but also becomes a form of culture and embodiment of values and bonds, not least with the area and communities where the supporter and their team find themselves. Moreover, the relational aspect should not be forgotten: football, match-related news, and the achievements of football teams remain an easy topic of discussion, not only among friends and family but also among colleagues and in the workplace.

Thus, if we assume that talking generically about "fans" can lead to a flattening of the different nuances that distinguish them, then this study was intended to differentiate among five different categories to which each fan can relate based on their behaviors and the intensity of their connection with their team and football in general:



- Diehard fans - typically season ticket holders; they regularly go to the Stadium, watch all the games on TV, and follow the team as much as possible
- Passionate fans - who watch the games and follow the team but only occasionally go to the Stadium
- Big-event fans - who mainly follow important matches and significant events
- Informed fans - who take an interest and keep up to date to have conversation topics with friends, colleagues, and relatives
- Partially interested fans - who only keep themselves generically informed about the team's results

How widespread are these categories within Serie A?

Passionate fans represent the largest group (37%), followed by partially interested fans (22%) and big-event fans (21%). A smaller percentage (14%) declare themselves informed fans, while "only" 6% say they are diehard fans. Differences between categories also emerge in demographics: some groups appear more male-dominated (diehard and passionate fans), while others have a higher female presence (3 out of 4 partially interested fans are women). Furthermore, in some categories (such as diehard fans), younger people are more numerous, whereas, in other categories, more mature fans dominate.

Another distinguishing feature is the reason that leads each fan category to start supporting their favorite team. In general, the family - i.e., having a family member or part of the family rooting for that same team - remains the main reason for becoming more closely involved with a football team (according to 39% of the fans). Another differentiating element for each group is the different weight attributed to other motivations - from the sense of belonging to the team's values and culture (more marked among diehard and passionate fans) to the connection with their city and local area (important for partially interested

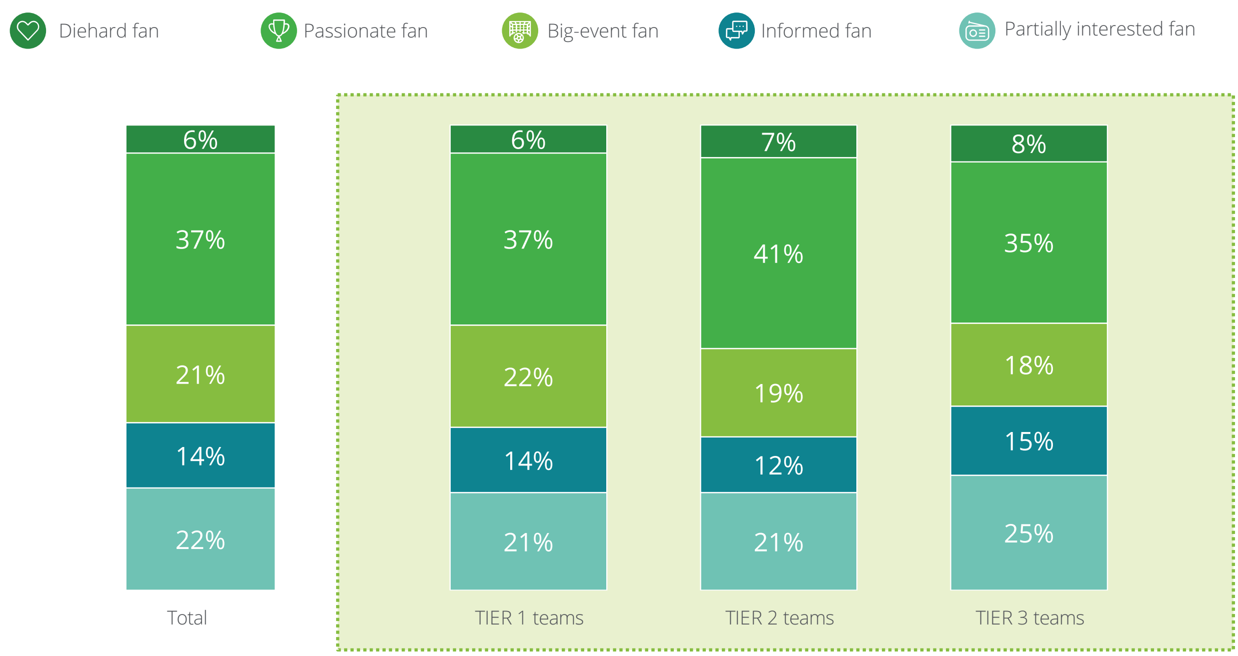
39% of the fans acknowledge the key role of the family in bringing fans closer to their favorite team

fans). Moreover, the fanbase makeup is relatively homogeneous among the different Serie A Club tiers, with a slightly higher percentage of passionate fans in Tier 2 teams (41% vs. an average of 36% of the fan in the other two tiers). Conversely, in Tier 3 teams, there are more partially interested fans (+4p.p. compared to the average)*.

* Tiers were identified based on the sports performance of Serie A teams over the past 4 years.

THE FANBASE MAKEUP BY CLUB TIER

Q. What kind of fan are you?
Base: Tier 1 teams (1.280); Tier 2 teams (399); Tier 3 teams (441)
Note: tier were identified based on the sports performance of Serie A teams over the past 4 years



Football is all about values and culture for diehard fans

Most diehard fans are men (60%); 1 in 4 belong to the 25-34 age group, and compared to the total number of fans, they are more frequently from regions in Northern Italy (31% vs. 27% of all respondents). However, in this category, it is, above all, the fans' attachment to their team's values and culture that stands out. 29% say that they have become supporters of their team precisely because they identify with its values and culture, compared to 15% who say the same among all the fans surveyed.

Nearly 2 out of 3 die-hard fans are men, 1 in 4 are 25 to 34 years old

Passionate fans soften the features of diehard fans

In the passionate fan category, 2 out of 3 are men, and 1 in 5 belong to the 45-54 age group. So, although this group remains male-dominated (as in the case of diehard fans), it generally attracts more mature fans. This demographic characteristic seems to be the main distinguishing feature between this group and the category of more dedicated fans. In addition, as in the case of diehard fans, this group is characterized by a stronger sense of belonging associated with the team's values and culture, with which these fans identify.

40% of passionate fans are between 35 and 54 years old

Female presence and attachment to the family are the most prominent features among big-event fans

The group of fans attending mainly significant events, such as European or world championships, shows a more substantial presence of women (59%) and a predominance of members in the 45-54 age group (21%). Furthermore, unlike the diehard and passionate fan groups, fans in this category report more frequently that they got involved with their favorite team because a member of their family supports (or used to support) that same team, thus placing football and football-related events closer to the domain of emotional ties.

59% of big-event fans are women, 55% are over 45 years old

Informed fans are older on average than fans in the other groups

In terms of demographics, what differentiates this category from all others is its fans' average age, the highest in the various categories considered. Indeed, members of the informed fan group are 47.5 years old on average, compared to a general average age of 45 years, which can go down to 40 years for diehard fans, the youngest category among the different groups. That results, in particular, from the fact that 2 in 3 informed fans are over 45 years old.

The average age of informed fans is 47.5 years old

The category of partially interested fans includes mainly women and many over-65 supporters. The connection with the team most often stems from the attachment to one's hometown

This group is female-dominated: 3 out of 4 supporters are women. It is also the group with the highest participation of over-65s, the largest group in terms of age within the category (although the record in terms of average age stays with informed fans). In addition, unlike the other fan groups, those who are partially interested claim to have approached their favorite team because it is (or was) their hometown team: 1 in 4 say so, compared to 19% on average of all fans.

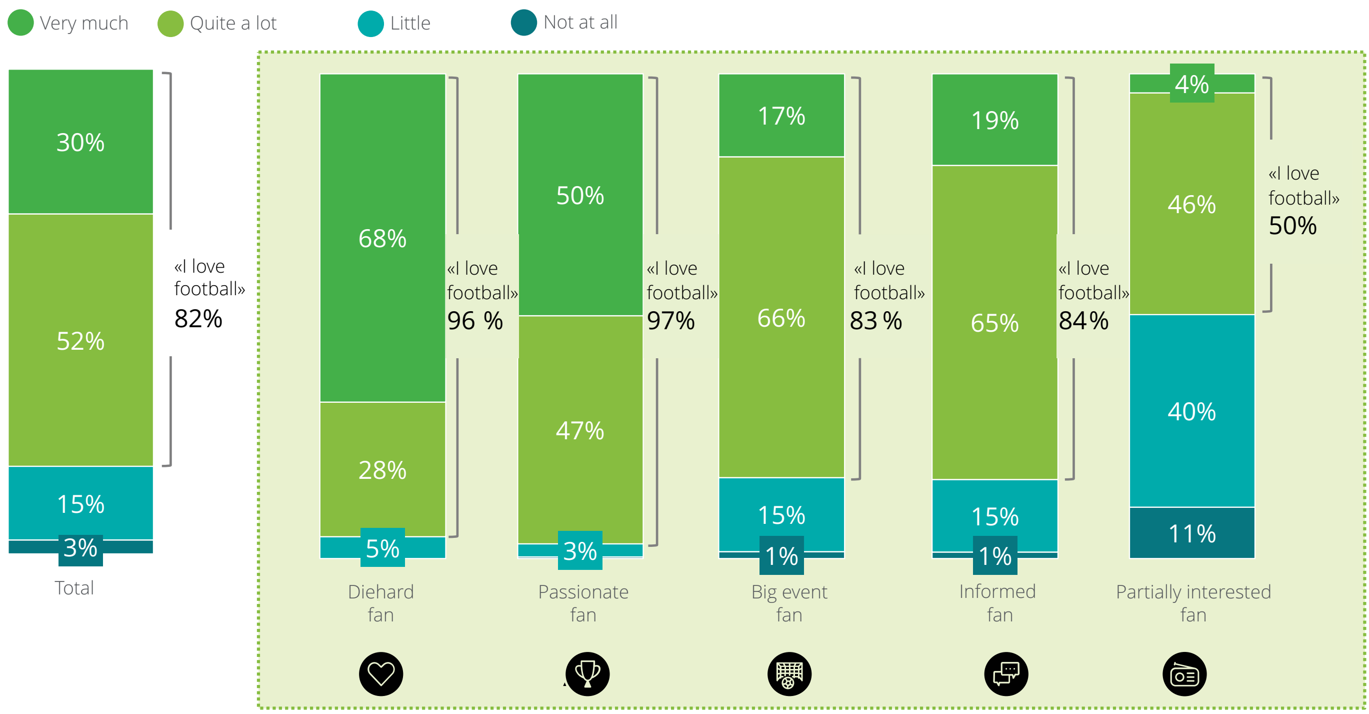
3 out of 4 partially interested fans are women, and 23% are over 65 years old

Looking beyond each fan group's distinctions and specificities, we can identify an additional grouping among these categories. On the one hand, diehard and passionate fans identify primarily with the game and the emotions it conveys; in other words, they are moved by a genuine passion that finds its roots in the emotional connection with the game itself. On the other hand, the other fan groups, gathering those less committed and attached to football and their team, attribute to the sport a role primarily related to socialization, and group dynamics, which allows them to feel part of a real community.

That distinction is also more explicitly found when it comes to the declared love for the sport, its values, and the role models it represents. Among diehard and passionate fans, this feeling is almost absolute: almost all supporters in these groups (96% and 97%, respectively) say they love football a lot or quite a lot, with the proportion of those who say they love it a lot being 68% among diehard fans and 50% among passionate fans. Conversely, this percentage drops to 83% and 84% among big-event fans and informed fans, respectively, whereas the rate of those who say they have little love for football and its values rises. Partially interested fans, however, stand out since "only" 1 in 2 say they love football and the values it represents, while a significant share says they love it little (40%) or not at all (11%).

BEING A FAN IS A MATTER OF PASSION AND LOVE FOR FOOTBALL, ITS VALUES AND CULTURE

Q. How much do you love football, its values, and culture?
Base: total sample (2.120); diehard fans (133); passionate fans (787); big-event fans (438); informed fans (301); partially interested fans (461)



Focus on
Do Italian Serie A Fans Follow Just One Team?

Being a fan is a matter of passion and love for football, and this sometimes means also following or sympathizing with other Clubs besides one's favorite team. Indeed, 44% of the fans surveyed said they also root for another team. This percentage tends to rise in cases where there is a stronger attachment to the sport: 51% of diehard and passionate fans also follow another Club, compared to 32% of partially interested fans. Men (50%) and people living in southern Italian regions (48%) are also most likely to sympathize with another team besides their own.

RELATIVES AND THE HOMETOWN PUSH THE FANS TO ROOT A SECOND TEAM

Q. What is the reason why you support also a second club?
Base: total sample (2.120)

31%

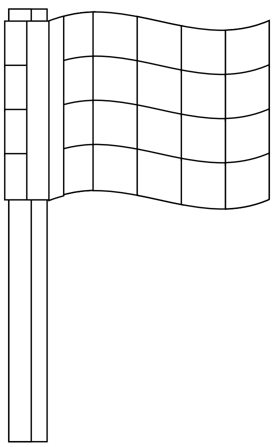
«It is the team of the city where I was born»

24%

«It is the team that a relative or friend supports (or used to support)»

24%

«It is the team of a city to which I have a sentimental bond»



The reasons for supporting a second Club are interesting. In the case of the favorite team, the primary motivation originates from the family. In contrast, in the case of the "second team," the reason lies mainly in the attachment to one's place of birth (according to 31% of those who also support another team) or to an area to which there is a sentimental bond (24%). In the latter case, supporters extend to physical places an emotional dimension that, in the case of the favorite team, is mainly family-related.

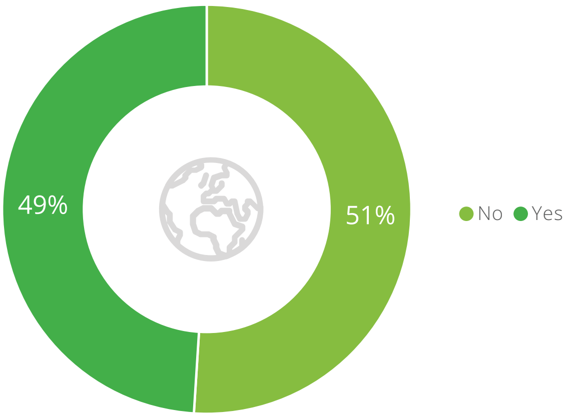
The fan's background influences the relevance of the place of birth in sympathizing with a second team: in the southern Italian regions, 39% of fans say they support another Club because it is the team of the city where they were born, compared with 25% in the North-West. In contrast, relatives and friends strongly influence the choice in the northern Italian regions. They are also a strong driver for very young supporters in the 10–14-years age group.

Passion for football games also takes one beyond national borders: 1 fan out of 2 declares they also follow football (teams, players, or leagues) from other countries, and this percentage grows among diehard fans. 83% of diehard fans and 70% of passionate supporters follow foreign football, compared to 16% of partially interested fans. Again, men (64%) and residents of Southern Italy (52%) stand out as the ones who follow foreign football the most.

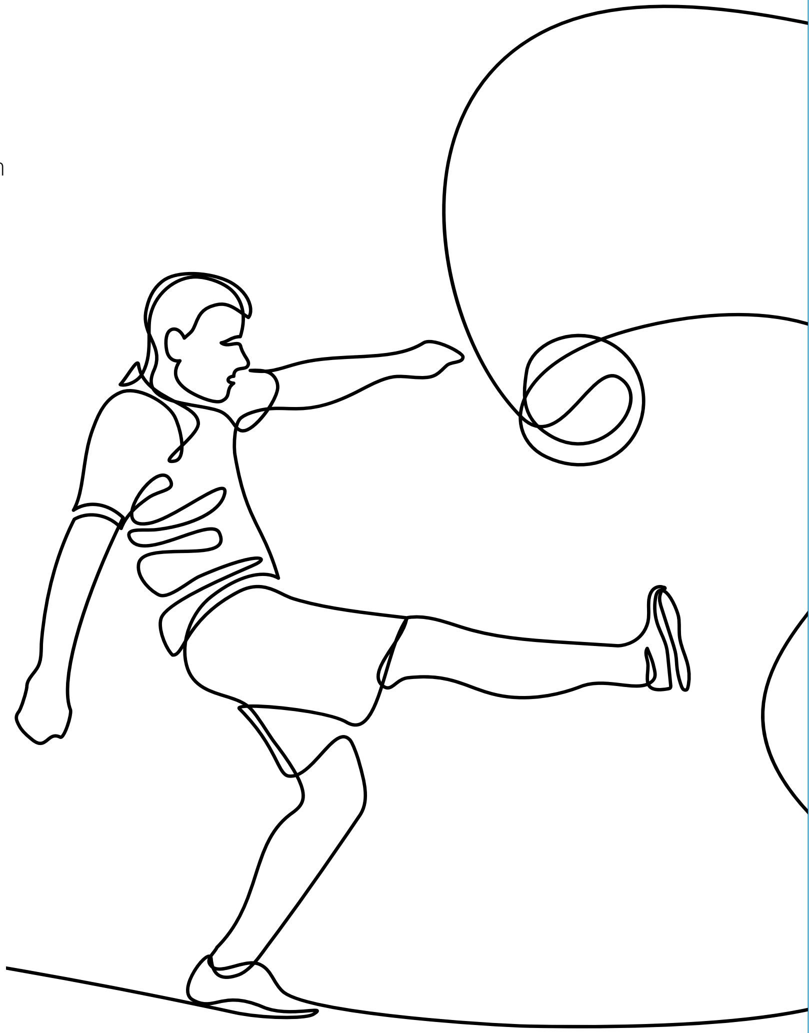
The fascinating aspect of foreign football is the level of entertainment the teams provide (this is stated by 45% of the fans who follow it) and the atmosphere inside the Stadium (43%). The excitement about the presence of football celebrities and super champions is more contained, with only 10% of Italian fans feeling envious of foreign teams. Nevertheless, it is worth noting that very young fans are still fascinated by the presence of football champions ("football idols"): 1 in 4 people in the 10-14 bracket would like to have a super champion on their team, along the lines of international Clubs.

1 FAN OUT OF 2 ALSO FOLLOW FOOTBALL FROM OTHER COUNTRIES

Q. Do you follow football (such as clubs, players, championships) from other countries?
Base: total sample (2.120)



The Levers In A Fan's Relationship With Their Club



Being a fan is not only a matter of being defined as such and belonging to a fan Club. It is also a way of relating to one's team and sporting events. Such relationship may be developed by attending games and events in which one's team is directly involved, but also through following the news and keeping up with the updates and, more generally, the content that Clubs may provide through countless channels - from the more traditional ones, such as print media and television, to the Internet and social media.

Fans seek contact with their team through different channels, which vary according to age. They look for content on technical aspects and interviews and an opportunity to participate in events where they can meet their team in person.

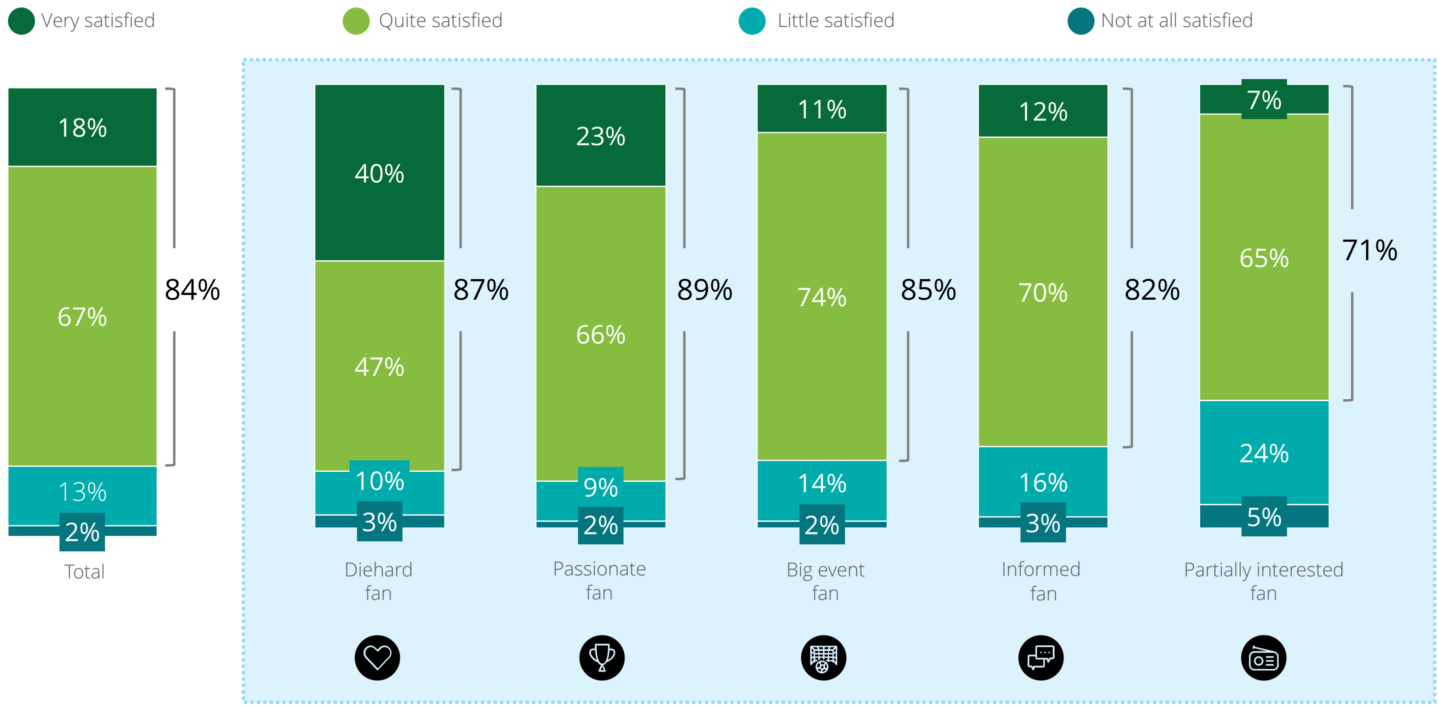
Fans are pretty satisfied with their team's content offering, but it is the teenagers who have the greatest enthusiasm

In general, the degree to which fans engage with the content created by their favorite team is very high: 87% of respondents say they have accessed some content, and this percentage rises to 100% in the case of diehard fans. Partially interested fans are once again the least engaged with their team, with just 2 out of 3 saying they have accessed content shared by their Club.

The level of satisfaction with this content is also high, with 84% saying they are (very or fairly) satisfied with their team's content, a percentage that rises to 97% among the very young. In general, however, diehard and passionate fans remain the most satisfied; in the case of diehard fans, the percentage of those very satisfied is as high as 40%. However, big-event fans and informed fans turn out to be happy with the content provided (85% and 82%, respectively), while partially interested fans are the least satisfied: 71% say they are somewhat satisfied, but 1 in 5 consider themselves unhappy with the content currently offered by their team.

THE LEVEL OF SATISFACTION OF SERIE A FANS WITH THE CLUB CONTENT

Q. How satisfied are you with your favorite team's content offering (such as news about players, technical aspects, social initiatives)?
Base: who views the team's content (1.847), diehard fans (133), passionate fans (766), big-event fans (386), informed fans (277), partially interested fans (285)



Still concerning the content, fans are most interested in sports subjects and results: 83% state that they follow (a lot or even just enough) these subjects, and this percentage rises to 97% in the case of diehard fans (72% say they follow these subjects a lot). Other types of news, such as those regarding corporate affairs or initiatives promoted by the team, are still followed, but less frequently: 65% of fans say they follow corporate news, while "only" 58% follow those related to the Club's social initiatives.

It should be noted that most diehard fans claim to follow, to a significant extent, all three types of news. Indeed, the fans in this category are the ones most closely linked to their team, and they follow the team-related content across the board, whether it concerns sporting aspects, corporate updates, or, more generally, the impactful and socially-oriented initiatives promoted.

58% of Serie A fans also follow news about their Club's social initiatives

Fans still rely on TV as a channel for enjoying football-related content, but young people are increasingly turning to social media

TV is one of the main channels to stay in touch with football teams and games. 2 out of 3 fans mention it as one of the main channels in which the teams should invest to strengthen this. The figure goes up for the more mature age groups, with 73% of the over-65s requesting greater investment in this regard. It is also worth noting that mainly the less "loyal" fan groups demand this focus on the TV channel: while diehard fans also show great interest in other channels (such as social media), big-event fans and informed fans show the strongest attachment to TV to relate to their favorite team and stay up-to-date on the news about it.

Not only is an interest in social media as a communication channel claimed by most diehard fans, but it is also more relevant, especially among teenagers and fans under 35, who express interest in boosting this channel to reinforce the bond with their team. However, the Internet, with websites and newsletters, captures the attention of the "middle age" group (those aged 35-45): 65% of them say they are interested in their team strengthening this communication channel.

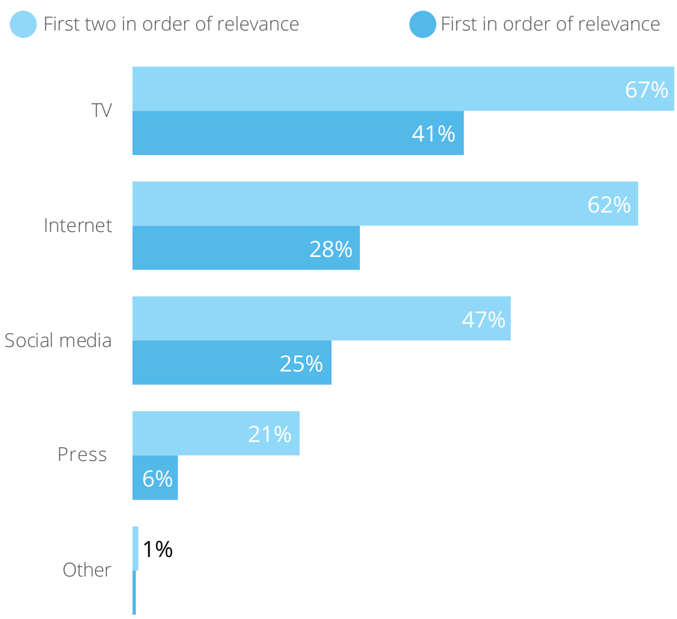
In general, only 1 in 4 say they would consider the press as a channel in which to ask their Club to invest more, even though in this regard, the generational factor plays a more decisive role: 33% among the over-65s say they are interested, compared to 13% of fans aged 15 to 24 (not to mention that among the under-14s the share is only 6%). It should also be noted that the press is a media that appeals mainly to informed and partially interested supporter groups. In contrast, diehard fans are the ones who prove to be more indifferent to this media, favoring instead - together with passionate fans - the Internet, websites, and newsletters.

Fans want content that is as closely related as possible to the game and the players, with technical aspects and interviews being at the top of their list

So while fans are asking their team to invest in TV and digital channels to encourage interaction, at the same time, they are also asking for greater focus, and further improvement of the content offered, regardless of the medium. In the same way that sports subjects and match results are generally the most popular content among the fans surveyed, content on technical/tactical aspects (i.e., strictly sports-related aspects) is where 1 in 4 fans demand improvement. However, the degree of interest differs between men and women. Indeed, men pay the most attention to these topics (31% ask their team for more content on these aspects) compared to 19% of women. In addition, the focus on these topics is higher among those over-65s; in this age group, 1 in 3 fans specifically ask their team to improve their content offering in this area, compared to a much smaller share among teenagers and young adults. The latter age groups, like women, prefer content such as interviews, thus showing a greater interest in content involving football personalities than content related to the game itself, its strategies, and technicalities.

THE FAVORITE CHANNELS TO INCREASE THE TOUCHPOINTS BETWEEN FANS AND THEIR FAVORITE TEAM

Q. What communication channels would you like your favorite team to invest in the most to increase the touchpoints with their fans?
Base: total sample (2.120)



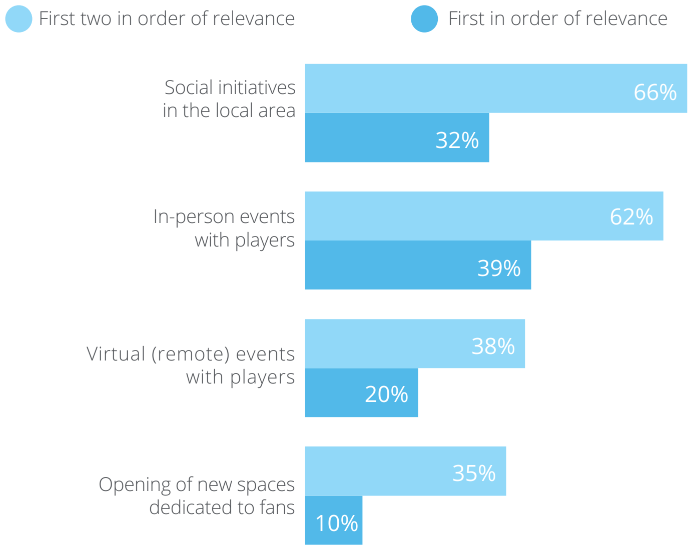
Not just content: fans demand more in-person events and social initiatives

The relationship between fans and their team builds not only on content but also on events and initiatives (both physical and virtual) that, besides matches, can provide increased opportunities for contact between the various fan categories and their idols. In this respect, supporters favor in-person events with the players, with 39% wanting their team to promote more face-to-face interactions with their idols. Moreover, this preference is most pronounced among diehard fans (59% of them are interested) and very young supporters (63%), which generally proves to be the age group most fascinated by football players, who are often idolized.

Among the more "placid" fan categories, on the other hand, there emerges greater attention to social issues and initiatives that could be organized to benefit the local area and the community they belong to. While "only" 32% of supporters in general place this category of events first among the initiatives they would like to see promoted more by their team, the figure reaches 45% among partially interested fans. This result is consistent with the profile of these fans: indeed, that group generally attaches greater value to the local and social dimension associated with its favorite team, which is also evident in the request for initiatives aimed at promoting and supporting to a greater extent the urban context and the area the team itself targets.

GREATER ATTENTION TO SOCIAL INITIATIVES THAT CAN BENEFIT LOCAL COMMUNITIES

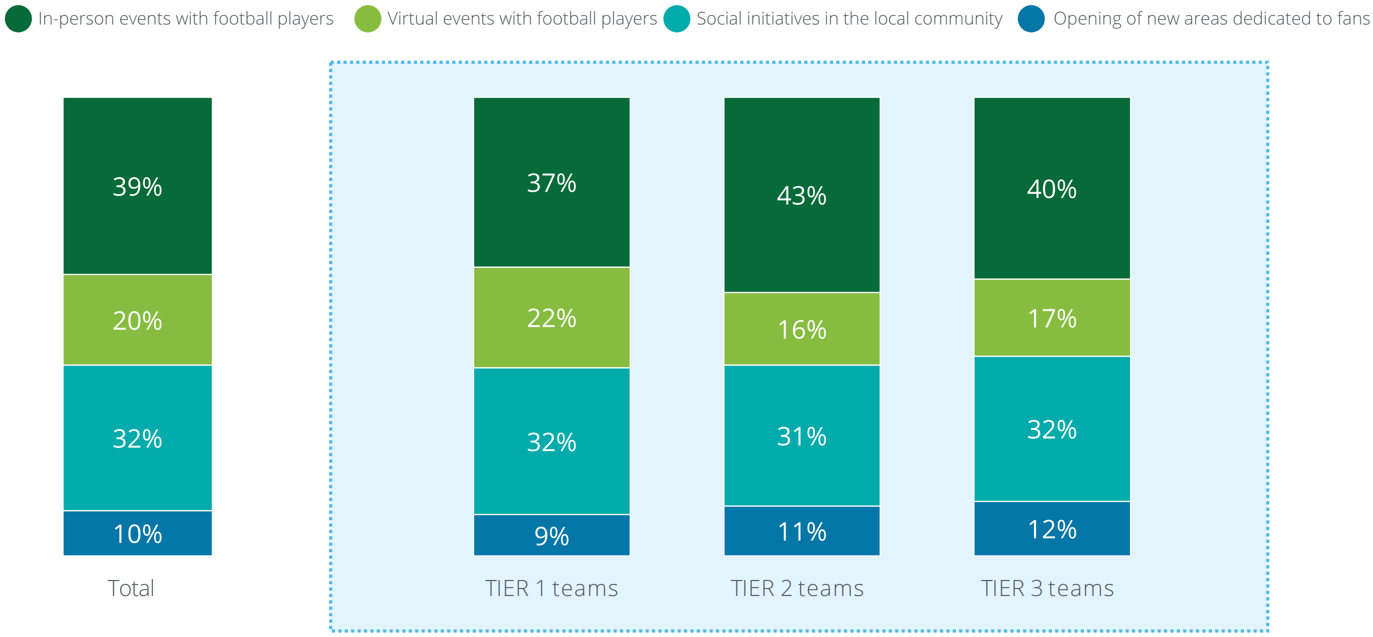
Q. Among the following initiatives, which ones would you like your favorite team to promote the most in order to increase the relationship with the fans?
Base: total sample (2.120)



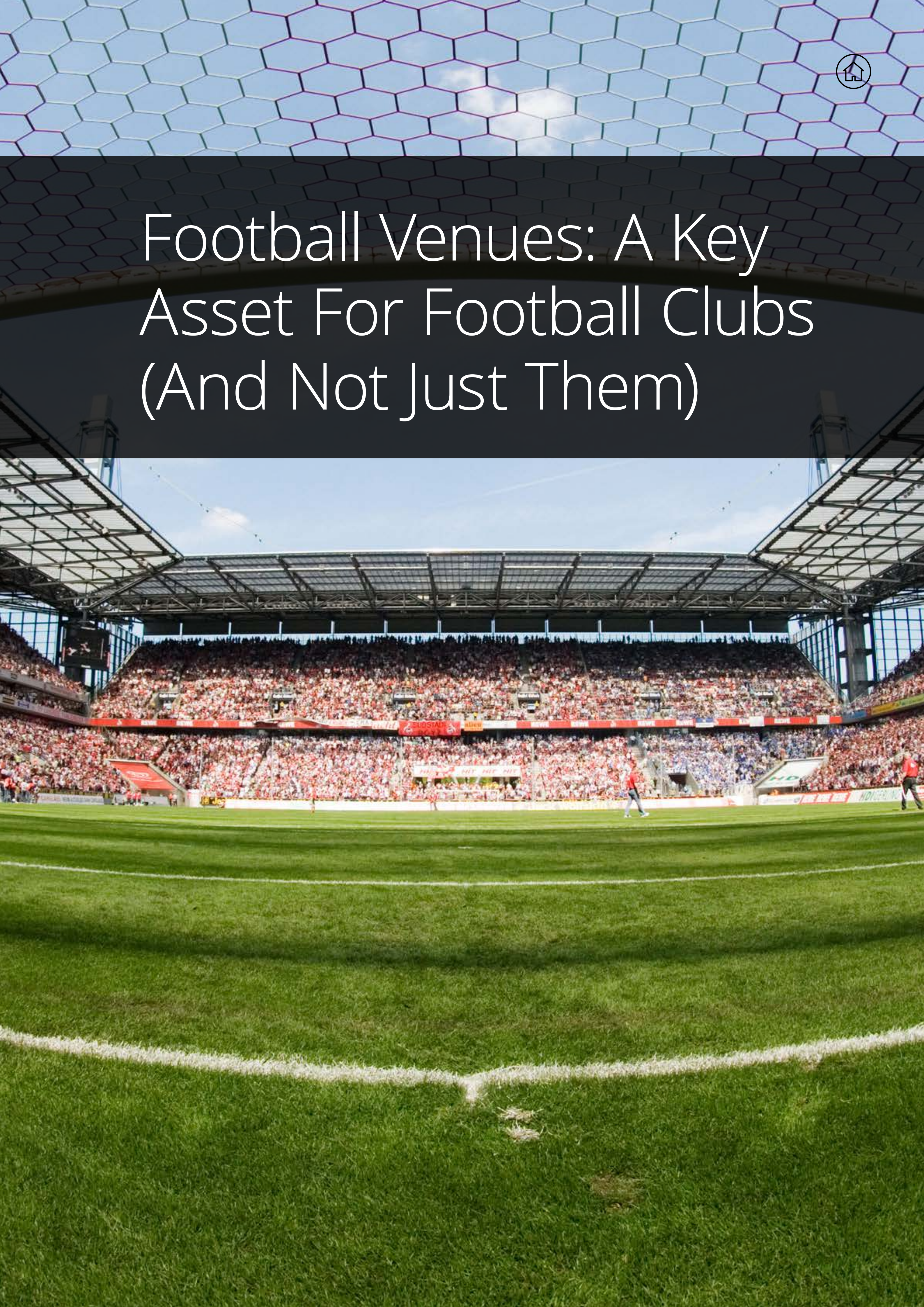
In addition, the breakdown of initiatives requested by fans to increase their engagement and provide an all-around experience is consistent across teams in the different tiers, with a higher proportion of Tier 2 fans requesting in-person events (43% versus 38% on average for the other two Tiers) and a lower proportion of Tier 2 and Tier 3 fans requesting virtual events with players.

THE PREFERRED INITIATIVES OF THE FANS BY CLUB TIER

Q. Among the following initiatives, which ones would you like your favorite team to promote in order to increase the relationship with the fans?
Base: Tier 1 teams (1.280); Tier 2 teams (399); Tier 3 teams (441)
Note: tier were identified based on the sports performance of Serie A teams over the past 4 years



Football Venues: A Key Asset For Football Clubs (And Not Just Them)

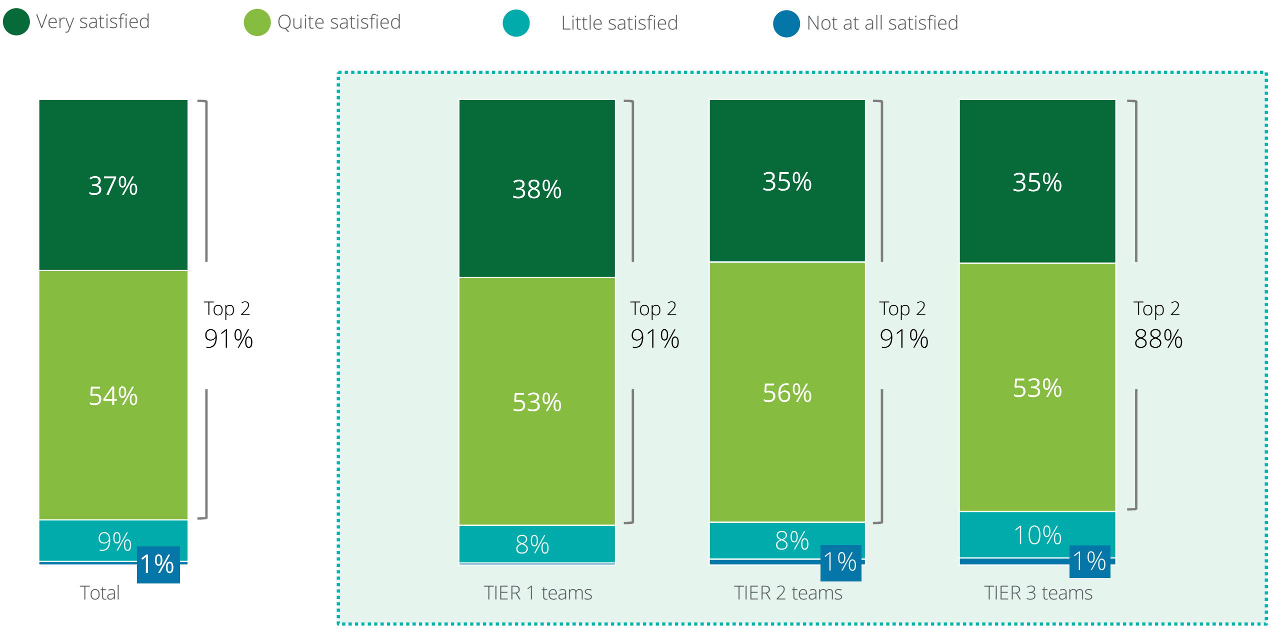


Being a fan and enjoying sports content can not leave out the relationship with the Stadium where the sports performance occurs. The Stadium has historically been the physical touchpoint between fans and their favorite team. However, Training Centers also intrigue fans and can become an opportunity to diversify the service offering.

Overall, 37% of fans are "very satisfied" with their experience within the Stadium of their favorite team today, while 53% are just "quite satisfied". However, the Stadium experience consists of different aspects, from the entertainment provided during the match to the services offered on the side. It should be noted that passionate and diehard fans – the groups that most often attend the Stadium – report the highest level of satisfaction. On the contrary, partially interested fans are the ones who provide the most tepid response when they state their satisfaction regarding attendance and their appreciation of the overall experience.

THE LEVEL OF FAN SATISFACTION WITH THE STADIUM EXPERIENCE BY CLUB TIER

Q. Regardless of the sport results, how satisfied are you with the experience in the stadium of your favorite team?
Base: Tier 1 teams (815); Tier 2 teams (305); Tier 3 teams (344)
Note: tier were identified based on the sports performance of Serie A teams over the past 4 years



69% of Serie A fans have been to their team's Stadium at least once

In addition, fan satisfaction for each club tier is highly comparable, with a slightly higher percentage of dissatisfied fans in Tier 3 (10% against 8% on average in the other two tiers), probably due to a more significant presence within the tier of fans who are not diehard fans but who expect to be involved in complementary initiatives and not just on match day.

This result refers to a general evaluation and appreciation of the experience of going to the Stadium. However, supporters become more selective when discussing their satisfaction with the specific services offered within these facilities: it is mainly the food and beverage options that enjoy the lowest level of satisfaction, with 1 in 3 of those who have been to the Stadium at least once stating that they are not satisfied with this service. 1 in 4 fans, on the other hand, say they are little or not at all satisfied with the comfort and convenience, safety, and accessibility of the Stadium. At the same time, the most appreciated features include the quality of the entertainment offered before and after the match and the single ticket and season ticket purchasing process.

As to Stadium comfort, diehard fans report lower-than-average satisfaction: Is it perhaps the "fault" of an higher facility attendance?

Regarding comfort and safety, it is mainly the younger age groups that are least satisfied: 12% of fans between 15 and 24 years old (compared to 4% of those over 65) are not at all satisfied with the comfort of their favorite team's Stadium, while 37% (vs. 24% of the over-65 group) say they are little or not at all satisfied with the level of safety. Moreover, when looking at the different categories of fans, we see that diehard supporters declare a lower-than-average level of satisfaction with comfort, whereas, for all other elements, their satisfaction is higher than that of the total number of fans. Indeed, only 64% of diehard fans say they are very or fairly satisfied with this aspect, compared to 72% of the total sample; only partially interested fans report lower satisfaction (61%). This outcome could be determined by an higher facility attendance by this category of fans, who might suffer more from poor services and lack of comfort.

About 1 out of 3 fans say they are dissatisfied with the food and beverage offer at their favorite team's Stadium

However, the item that most garners fans' satisfaction remains the quality of the entertainment offered (before and after the match). The Stadium is a venue for entertainment, which is generally appreciated by all fans, although, as conveyed above, they would not mind better ancillary services that would make the entertainment experience more enjoyable.

About 1 out of 3 diehard fans say they are dissatisfied with the comfort of their favorite team's Stadium

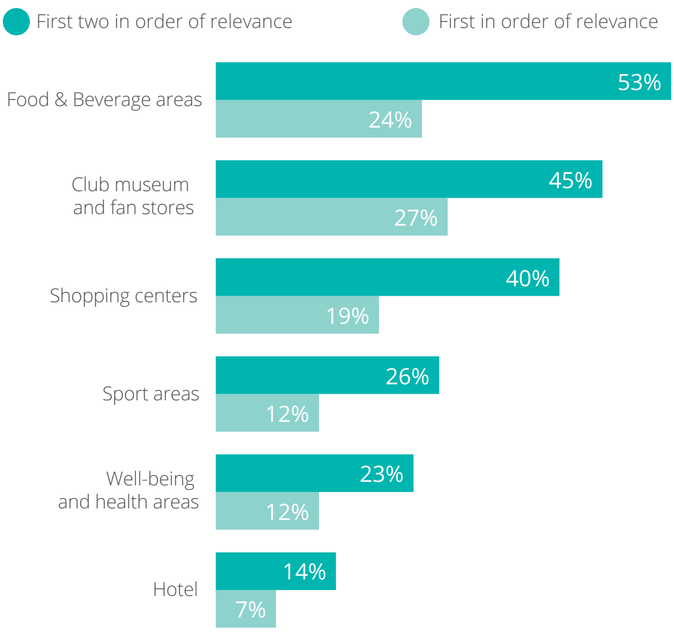
In the case of Stadium renovation, Serie A fans ask their team to upgrade mainly the refreshment areas and introduce fan stores or a Club museum

The possibility of renovation at their favorite team's Stadium leads fans to call mainly for the introduction of food & beverage areas (1 in 4 consider them to rank first among the desired intervention areas), a Club museum, and a fan store (27% mention it as a priority). It should be noted that the food & beverage areas appeal more to women and the least engaged fan categories (specifically, partially interested fans). In contrast, the museum and fan store attract men primarily, the under-14 group (44% consider it the priority area for intervention compared to 27% of the fan average), and the fan categories most closely connected to the team and the football experience, i.e., the diehard and passionate fans.

Other possible areas of focus (hotels, sports areas, shopping centers, health services, etc.) are viewed with more restrained enthusiasm, although there are differences depending on gender, age, and one's level of love for football. For example, the idea of a hotel appeals more to women, young people (between 15 and 34 years), and in particular, fans residing in the southern regions; the sports area is a priority for men and the young and very young age groups; services such as the gym, and the medical center garner more interest from women, those residing in northern regions, and partially interested fans. In contrast, shopping malls are often mentioned as a top priority in the South-Central areas and among those over 65.

THE EXPECTATIONS OF FANS ABOUT SERVICES IN A NEW (OR RENOVATED) STADIUM

Q. Should your favorite club decide to renovate/build a new Stadium, what are the main facilities you would like to find inside it?
Base: total sample (2.120)



In the hypothesis of renovation of their Club's Stadium, what would be the impact on fans' propensity to spend on related products and services?

The scenario of a new Stadium, or the possibility of a renovation of the current facility, leads a significant proportion of fans to say that it could positively impact their propensity to spend on related products and services, particularly events additional to match days, such as events with players: an increase in spending propensity is reported by 44% of fans, a percentage that rises to 76% among diehard fans (39% declare they would consider increasing their spending by more than 10%) and 55% in the 15-24 age group. This result, particularly for diehard fans, can be traced back to their great attachment to their team and the team's Stadium, which includes an interest in frequenting this venue also beyond the "traditional" match day for other events and initiatives. Furthermore, such an outcome aligns well with these fans' request – already highlighted in this study - to promote more in-person events with the players to increase the bond between the team and its fans.

If spending on extra events appears to be the area potentially most positively impacted by the Stadium renovation, according to a significant proportion of fans, spending on tickets or season tickets, food and beverages, and merchandising would also see a boost.

The new (or renovated) Stadium would determine an increase in the current expenditure for season tickets or match tickets, especially among men (47% vs. 34% of women), the younger age groups (52% of fans in the 15-24 age group vs. 28% in the over-65 age group) and among diehard fans (68% vs. 16% of partially interested fans). It should also be noted that among diehard fans, 29% say they would be willing to increase their current spending by more than 10%, whereas among partially interested fans, the proportion of those who say they do not currently go to the Stadium and therefore do not spend on this item remains high.

Men, young people, and diehard fans would also be willing to spend more on merchandising. However, even in this case, diehard fans stand out: among them, the percentage of those who declare that they are willing to increase current spending by more than 10% is greater than those with a more moderate propensity (37% and 32% of diehard fans, respectively)

As to the effects on the propensity to spend on food and beverages at the Stadium, the renovation of the facility would result in increased spending by the die-hard fans (according to 65%), among fans in southern regions (41% vs. 35% in the North-West) and among 15–24-year-olds (47% vs. 27% in the over-65 group)

In terms of profit for Clubs, the assets available to teams can be leveraged to exploit their untapped potential and generate additional revenue

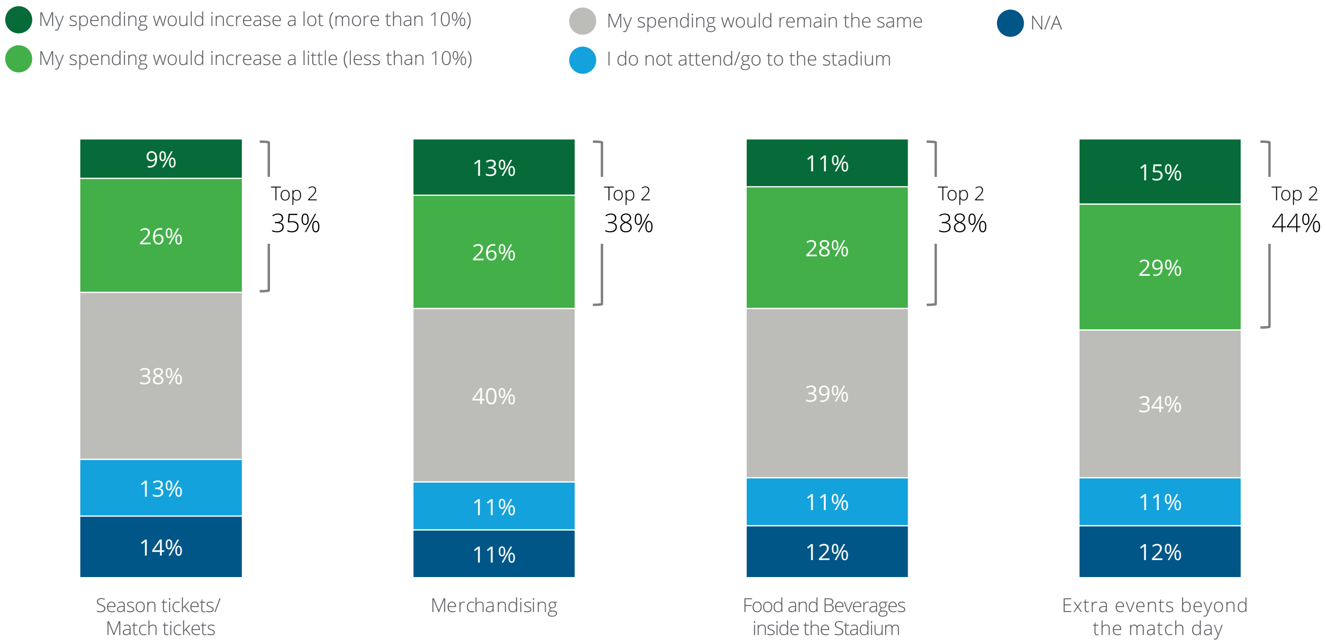
The findings from the study reveal high untapped revenue potential for Clubs, resulting from the desire of fans to be more involved in experiences that connect them with their favorite team and from their willingness to spend more. That requires investment in team assets by the Clubs to trigger new revenue streams and enhance existing ones by developing new initiatives that include a broader concept of entertainment and engage even the least dedicated fans during non-match days.

Specifically, the amount of untapped potential, measured in revenues from the additional spending propensity reported by fans of Serie A Clubs, is about €33 million, mainly from increased spending on game and season tickets. This finding refers to an increased propensity to spend claimed when supply is essentially unchanged and concentrated on match days only.

However, this result captures only some of the benefits of constructing a new Stadium. As analyzed in a recent study conducted by Monitor Deloitte, it is estimated that investing in a new Stadium triggers a rethinking of the entire business model based on the development of a heterogeneous Value Proposition operating seven days a week, capable of attracting diehard fans as well as the rest of the community. These benefits are quantified at approximately €800 million for Serie A, of which 52% is generated from ticket and season ticket sales, as well as through General Admission and Hospitality; 15% from commercial agreements such as, for example, new sponsorships or the sale of naming rights; 21% from renting to third parties spaces that are part of the Stadium complex; 8% from food & beverage and merchandising; and finally 4% from parking.

THE PROPENSITY OF FANS TO INCREASE THEIR SPENDING IN CASE OF STADIUM RENOVATION

Q. Should your favorite club decide to renovate/build a new Stadium, how much would you be willing to spend?
Base: total sample (2.120)
Note: tier were identified based on the sports performance of Serie A teams over the past 4 years



Focus on
Beyond Stadiums: The Value of Training Centers for Italian Fans

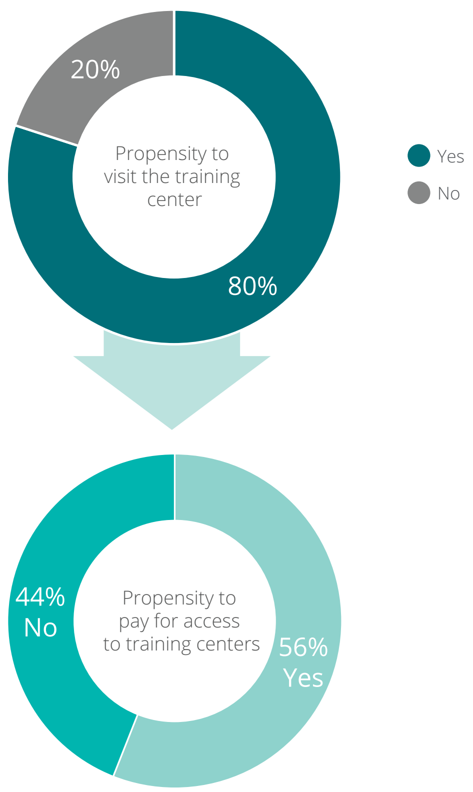
The Stadium is the ultimate place when it comes to creating a touchpoint between fans and their football team, but there are also other venues that football Clubs can enhance to strengthen their ties with fans.

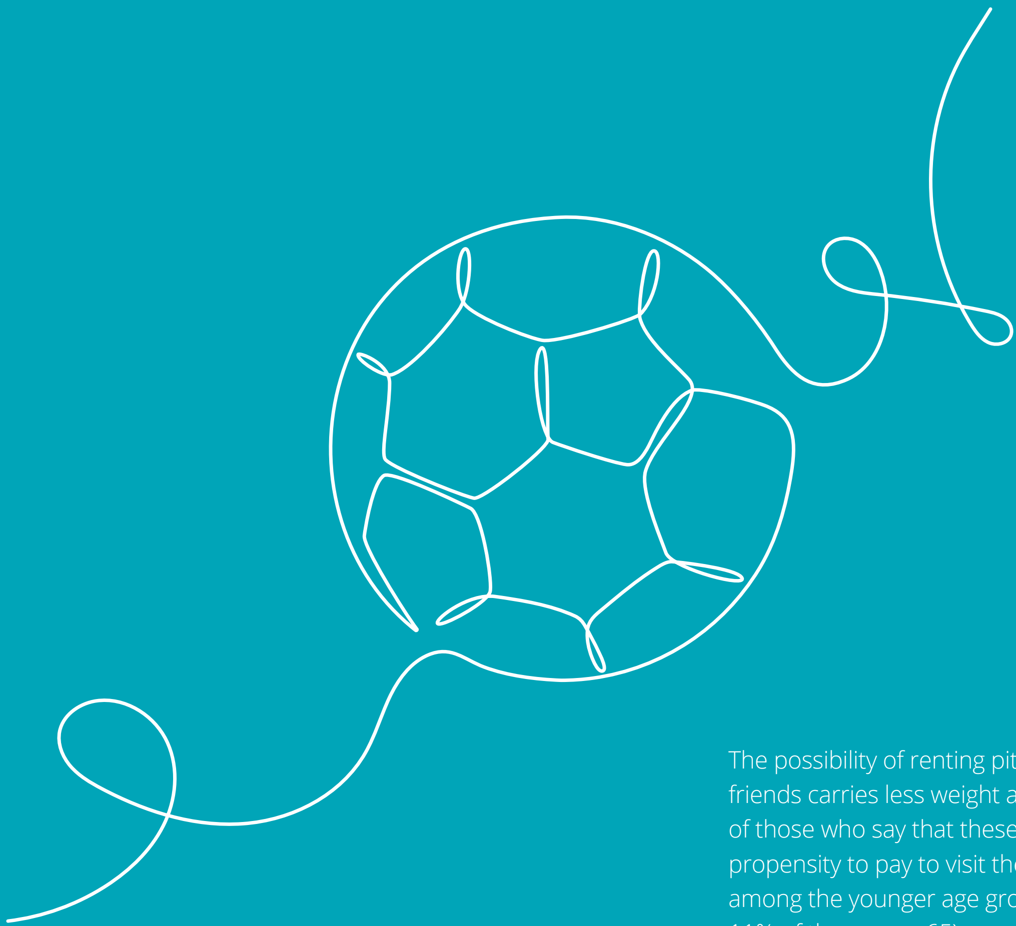
That is the case with Training Centers, where the teams' training sessions occur. They appear to be a place of interest for most Serie A fans: 4 out of 5 say they would be interested in visiting their team's Training Center at least once, should the team decide to open the facility to the public. It should be noted that this propensity is highest among younger groups - with 97% of very young fans (under 14) saying they are interested, compared to 68% of those over 65 - and among the most ardent fan groups (92% of passionate fans vs. 58% of partially interested fans). Geographical origin is also relevant here, whereby residents in the south-central regions appear more interested than fans in the northern areas (in the South, the proportion of fans interested in these centers is 84% vs. 76% in the North-West).

56% of those interested in visiting the Training Center would also be willing to pay to access it

SERIE A FANS AND THE TRAINING CENTER

Q. Should your team open the training center to the fans, would you visit it at least once?
Would you be willing to pay to visit the training center?
Base: total sample (2.120); who is willing to visit the training center (1.691)





So, there is a high propensity to visit Training Centers, but would this remain so even if admission were subject to a fee? Among those who say they are willing to visit these facilities, more than half (56%) also say they would pay for the visit. That result gets higher among the most loyal fans, with 79% of diehard fans accepting the paid option, compared to 35% of the partially interested fans; note, however, that even 1 in 2 of the big-event or informed fans would pay to visit their team's Training Center.

There are some services and facilities that would increase the propensity to pay for access to Training Centers: among them, areas for meeting with the team and technical staff (mentioned by 51% of fans), followed by courses and activities for kids such as football schools or summer camps (by 38%), as well as food courts, bars, and restaurants (by 34%). It is worth noting that, while food services impact similarly on the propensity of all fan categories to pay to visit the Training Centers, courses and activities for young people are the most appealing features to the more placid fans (43% consider them a factor that would increase their propensity to pay), once again highlighting the connection between these fans and the more social/educational aspects of the football game.

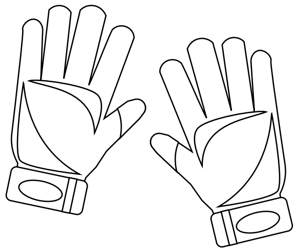
The possibility of renting pitches to organize matches with friends carries less weight among fans, although the percentage of those who say that these services would increase their propensity to pay to visit the Training Center is much higher among the younger age groups (28% of 15- to 24-year-olds vs. 11% of those over 65).

In keeping with the findings from fans' responses, a recent Monitor Deloitte study highlights the economic potential inherent to Training Centers. Indeed, making them profitable by opening them to the public seven days a week and developing initiatives to attract non-fans would generate average additional revenue per Club of about €6 million, translating into €120 million annually across the system. Most of these revenues (about 60%) would come from new commercial agreements, with the remaining 40% split between ticketing, food & beverage, merchandising, and event organization.

Fans and the Future of Football

Today, the world of professional football is undergoing changes that undoubtedly originate from the new needs and expectations of fans (not only the diehard ones), but it also has to deal with and embrace the challenges brought about by the spread of digital technologies. As a result, the (digital) touchpoints between team and fan and the means for engagement and retention are multiplying, and there are more and more tools that can be made available to improve the game and its fairness and to create new opportunities and new interactions to enhance the fan's experience with their team.

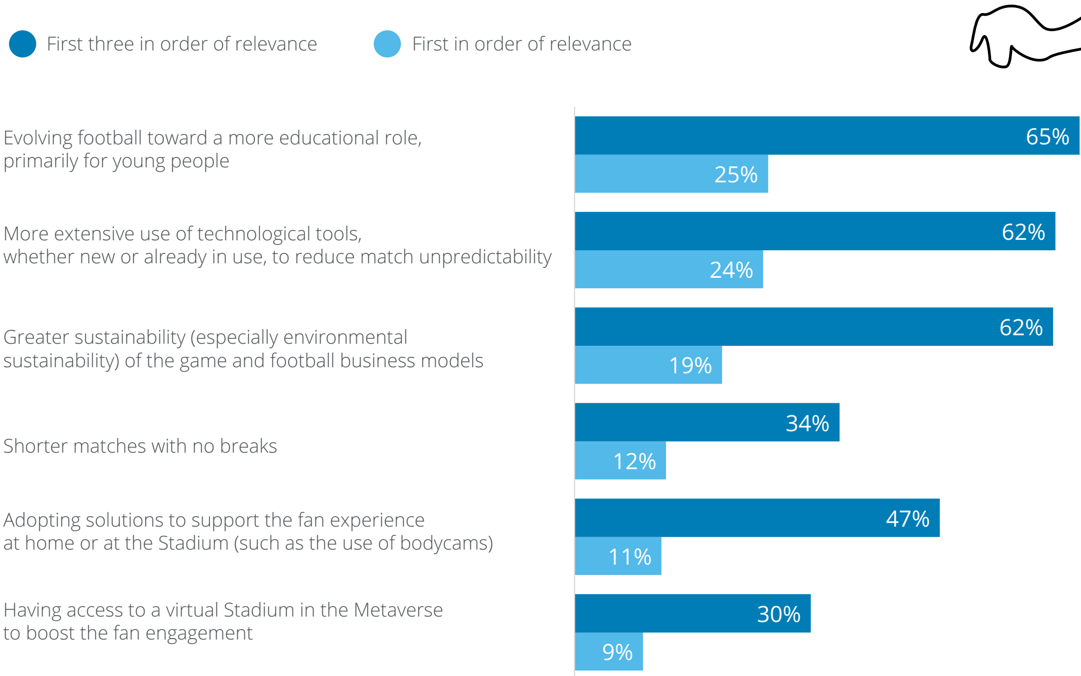
The survey results show that the main changes desired by football fans in the next ten years include, in particular, an increased interest in the social and educational role played by this sport in terms of ethics, loyalty, and inclusion (an aspect mentioned by 65% of fans); more extensive use of technological tools, whether new or already in use, to reduce match unpredictability (62%); and greater sustainability (especially environmental sustainability) of the game and football business models (also 62%). As for the possibility of adopting solutions to support the fan experience at home or at the Stadium (such as, for example, the use of bodycams), these generally appeal to nearly 1 in 2 fans, although they rank only fifth in the list of fans' desiderata, coming after the issue of reducing breaks during the game.

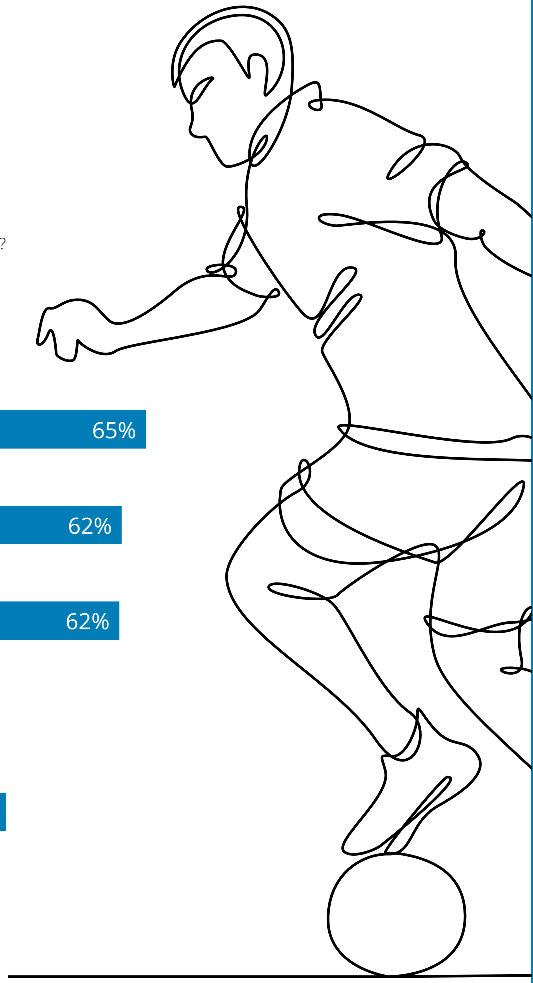


In the medium to long term, fans would like their Serie A Club to pay greater attention to the educational role of football, its environmental impacts and sustainability, and the use of digital technologies to improve the game and enhance the opportunities provided to meet with their favorite team.

MAIN CHANGES DESIRED BY FOOTBALL FANS IN THE NEXT TEN YEARS

Q. Considering the current trends, what are the main changes that you would like to see in the world of football in the next 10 years?
Base: total sample (2.120)





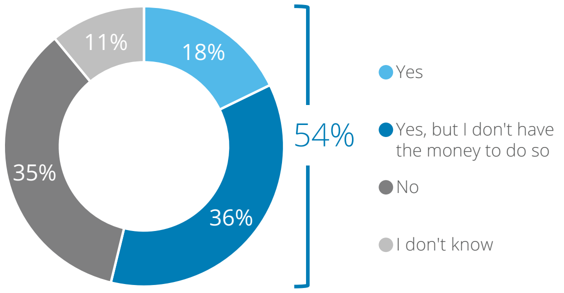
1 in 4 fans put evolving football toward a more educational role, primarily for young people, at the top of their wish list

Furthermore, although the subject of the Metaverse and Web3 is beginning to find its place among football fans' expectations, this aspect remains contained: almost 1 in 3 fans include in their medium- to long-term wish list the possibility of having access to a virtual Stadium in the Metaverse to boost their engagement, but this percentage grows significantly among younger fans.

Finally, among the possible paths of development facing football and the corporate structures of football teams, we should not forget that 1 in 2 of the adult fans surveyed said they would be willing to invest their savings in their favorite team's shares, although 1 in 3 made it clear that they would not have the money to do so. Thus, about half of the respondents show a positive attitude toward widespread share ownership in football Clubs as part of an effort to get even closer to their favorite team and its dynamics. That is especially true among the diehard fans, the most attached to their favorite team, its values, and culture: in this group, 87% of the fans say they are willing to invest in their favorite team, compared to 25% among partially interested fans.

1 ADULT FAN IN 2 SAY THEY WOULD BE WILLING TO INVEST IN THEIR FAVORITE TEAM'S SHARES

Q. Would you be willing to invest in your favorite team's shares?
Base: adult fans (1.989)



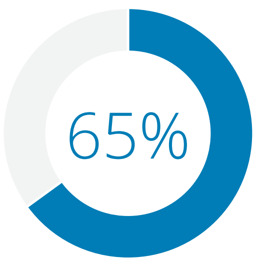
Focus on Should the Rules of the Game Also Change?

While the Serie A fans expect that topics such as ethical and social aspects, sustainability, and digital tools will be considered by football Clubs over the next decade, the rules of the game and the possible transformations that technology can bring to them are also under scrutiny.

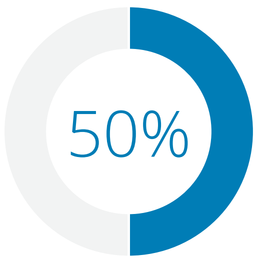
Just think of VAR, which has been a topic of heated discussion in the football world for years. Regarding the use of this technology, 2 out of 3 fans would be willing to go a step further, declaring themselves in favor of the introduction of VAR upon request by the technical team of the aggrieved Club: in favor are primarily men (70%) and diehard fans (80%).

Introducing a cap on referee decisions using VAR has drawn a more tepid response: “only” 1 in 2 fans favor it, although the percentage is higher among older fan groups.

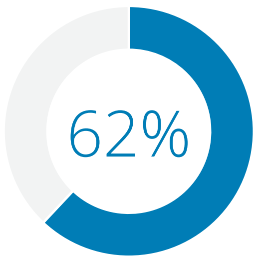
It should also be noted that 2 out of 3 respondents also favor the introduction of actual playing time, which would allow for greater control over the timing and consequently bring the duration of the game closer to the real playing time, as is the case, for example, in other sports, most notably basketball. Those in favor are mainly diehard fans, most interested in football-related technical issues. In any case, even among the partially interested fans, 1 in 2 say they are in favor of this novelty, although in this category, there is still the highest percentage of respondents who admit that they are unable to assess the issue (21%, compared to 5% of the diehard fans).



% in favor of the introduction of VAR upon request



% in favor of the introduction of max. 1 minute limit for VAR decisions



% in favor of the introduction of actual playing time

Conclusions

To summarize the sentiment and interpret the "customer voice" of Italian fans, what is evident is that they demand a redesign of the product and service offering and ways of interaction. This includes expanding and reinventing the frequency and modes of their interaction with the Clubs. They also demand greater attention to the social and environmental impact generated by football.

A detailed analysis of the "customer voice" of Italian fans makes it possible to highlight the **main requirements** that Italian Clubs need to meet to capture additional business potential. In summary, fans have mainly expressed the need for the following:

1. **Entertainment options** enabling them **to extend** the duration of the sports experience on **match days** through side initiatives during the match and in the hours before and after;
2. **More opportunities** for contact with the Club and the team, focusing on the interaction within a **physical spatial context** (e.g., Stadium and Training Center) and in a **digital** environment, also through new technologies (e.g., the Metaverse);
3. The possibility of benefiting from **heterogeneous** and **customized** content offers capable of capturing the specific needs of different users (e.g., households) simultaneously and turning purely sport-related aspects into more general entertainment content;
4. Access to **heterogeneous models of service** and contact with the Club, featuring different interaction channels and content - especially considering age differences - and allowing flexibility and dynamism in interactions;
5. Evidence of increased **attention to social**, **environmental,** and **educational** aspects, also through increased contact opportunities and by strengthening the bond between the community and the Club, even beyond match days.

Against this background, it is clear that meeting the needs of fans implies that **Clubs** must make a significant **effort** that requires, as in the case in many other Italian industries, a **systemic approach** involving all the main sector stakeholders.

Read more

Let's Play! 2022 - The esports market in Europe

The new edition of Deloitte's annual study of the European esports market surveys the behaviors and expectations of about 14,000 people aged 16 to 65 in 11 European countries (including around 1,000 in Italy) and gathers the opinions of 53 experts and companies operating in the esports sector in Europe.

Annual Review of Football Finance 2022

The 31st edition of the Annual Review of Football Finance, the leading independent analysis of the European professional football business, focuses on the 2020/2021 season - still affected by the pandemic - providing insight into Clubs' efforts to pursue long-term financial sustainability.

Football Money League 2023

The 26th edition of Deloitte's Football Money League analyzes the trends in the revenues generated by the world's top football Clubs during the 2021/22 season. Specifically, this latest report looks at how the Top 20 Clubs in world football generated total revenue of €9.2 billion.

Methodological Notes

The overall objective of this survey was to analyze the behavior of Serie A football fans in Italy and their expectations regarding their favorite team's offering of content and services.

For this purpose, interviews were carried out using the CAWI methodology (online interviews with panel members in Italy), integrated with the CAPI methodology (face-to-face interviews) to collect the opinions of younger people (10-14-year-olds).

The study focused on individuals residing in Italy aged between 10 and 75 years who claim to be football fans, with quotas set by geographical area, gender, and age group based on population distribution in Italy. The sample analyzed consisted of 2,120 respondents interviewed in September 2022.

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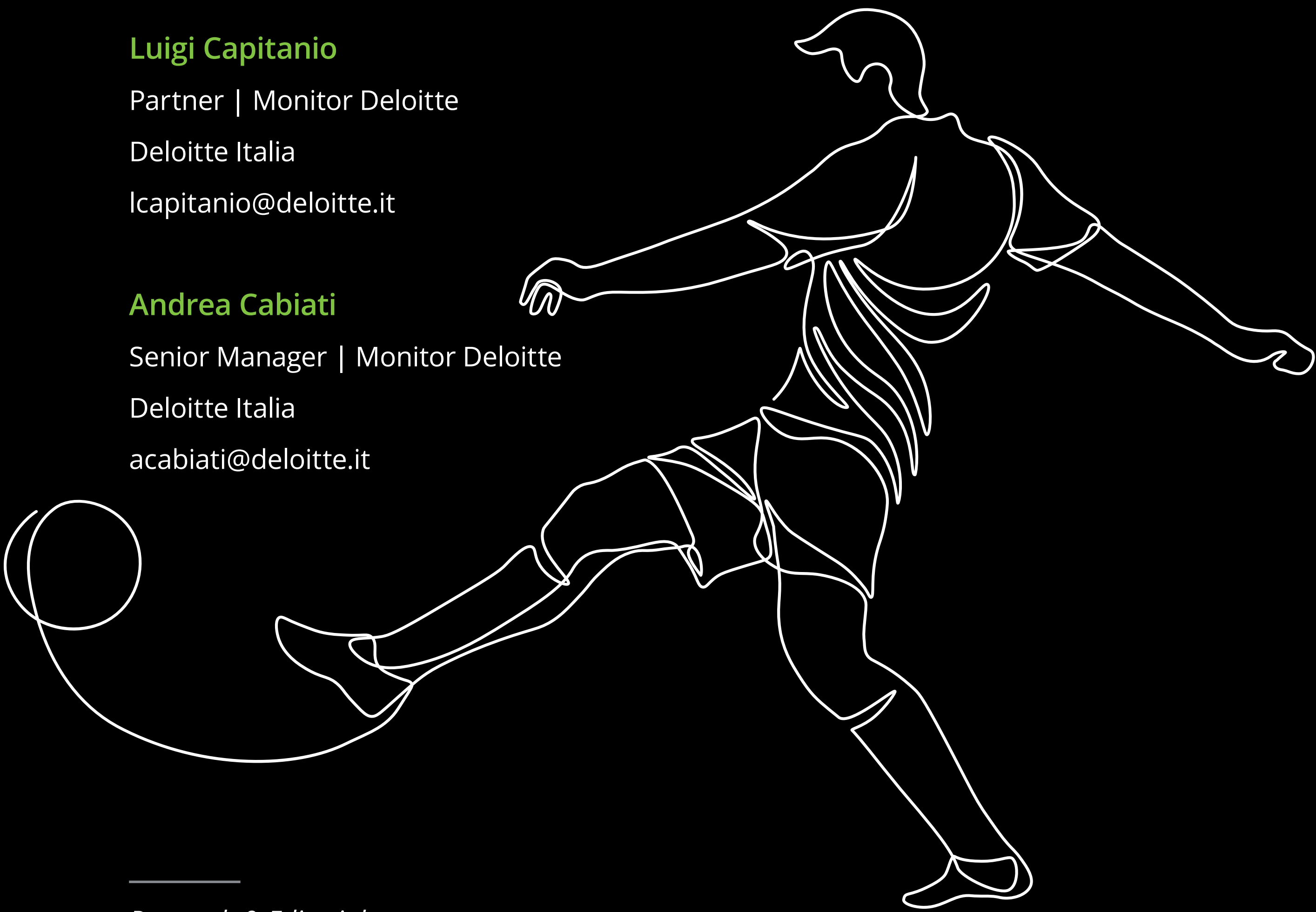

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