



THE POWER OF SPORT 2022

Making the most
of the sporting
year ahead

March 2022

KAM FANZO

FORMERLY MATCHPINT

KICK OFF

”

Sport. There's something about it. What else but a last minute winner prompts us to spontaneously and simultaneously erupt? We lay emotions bare as we shout at televisions, throw drinks in the air, and wrap arms around strangers with whom we've never spoken. The ability of sport to bring people together is unparalleled. In jubilation or desolation, our differences are set aside. For one moment we are one. We are seen. We belong.

Never has there been as much sport available for as many to watch as during the Covid-19 pandemic and yet no one that I've spoken with can remember more than fleeting moments of the action. Why is that? Put simply, it's because without the shared experience our emotion counts for near to nothing.

Since setting up FANZO we've asked thousands of people to tell us their favourite sporting memory. Not once has someone begun their answer: "this one time, I was sitting at home by myself and..." nor: "well we were watching the match together on Zoom when..." Memories are made together, in the flesh, living out life in the moment, not on replay.

For some the stand out moments come at the stadium, but there's a problem. Stadiums have limited capacity, are fixed in one location, and often carry exorbitant costs. It doesn't matter how much you love Barcelona, if you live in Lichfield you're not at the Nou Camp every week.

So here's the opportunity for pubs. As this report shows, there is an opportunity to bring fans together and create unforgettable sporting memories every single week. From World Cups and Premier Leagues to Euros and Super Bowls, there are so many memories to be made.

With the help of this report, you'll ensure they're created in your pub and not forgotten on a sofa at home.

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Dominic Collingwood, Co-founder of FANZO



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THE VALUE OF THE SPORTS FAN

22%

Sports fans visit a pub to watch live sport at least once a week

3

They have a repertoire of 3 pubs, on average, in which they watch live sports regularly and they stay for an average of 3 hours per visit

4

Is the average group size of sports fans watching live sports in pubs

£29

Is the average drinks spend. per person, when watching live sports in pubs

64%

Of publicans believe that live sports is profitable for their business

Live sports are a key footfall driver to pubs for sports fans. A third of their visits to pubs are to watch live sports. This not only shows the power of sport in attracting customers to pubs, but also shows the power of sport in driving incremental pub visits and instigating customer loyalty. Sports fans, in general, visit the pub 42% more often than the average UK adult.

Sport can expand the repertoire of pubs for a customer. Introducing them to new venues that they perhaps have never been to before. The exponential impact can be significant, as, on average, the group size for customers watching live sports in pubs is higher than average, 4 people per visit. This creates a huge opportunity for pubs to be attracting new customers to venues. Just imagine that one of these 4 friends has not been to this particular pub before and they then bring 1 new friend to their new favourite pub, and so on. You can see how quickly it can grow. Sport has the power to bring people together, but it also has the power to bring new customer and create new occasions.

Not only is the sports fan a loyal customer but they are also a valuable one. They spend an average of 3 hours in the venue per visit- and 44% spend more than 3 hours. As a revenue generator, the sports fan can be relied on to spend roughly £30 on drinks per visit. They also spend money on food, £12.10 on average, however, here lies an opportunity for pubs. 4 in 10 don't generally buy any food when they watch live sports in a pub. That's an incredible, untapped, customer base for pubs to exploit. By getting the food proposition right, pubs can open up an incremental revenue stream that has the potential to be repeated across the year as these customers keep coming back for their live sports fix. Sport has the power to score pubs big wins throughout the year.

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(The below are based on the total UK adult population of 52m)

17.7M Will watch a Men's Premier League game in a pub this year

7.8M Will watch a Women's Super League game in a pub this year

15.1M Will watch the Men's UEFA Champions League Final in a pub this year

10.4M Will watch a 2022 Men's Six Nations Rugby Championship game in a pub this year

8.8M Will watch a 2022 Women's Football European Championship game in a pub this year

16.1M Will watch a 2022 Men's FIFA World Cup game in a pub this year

7.8M Will watch this year's Wimbledon Tennis Championship in a pub

THE YEAR OF SPORT 2022

The customer

Just when you think a sporting year can't get any bigger, the very next year rolls into view and somehow manages to offer even more potential than the last. We may have had a bumper year in 2021, with the rearranged Olympics and the Men's European Football tournament – which ultimately ended in heartbreak for any England fans and joyful schadenfreude for pretty much everyone else! However, 2022 promises to be another one for the record books with a bumper schedule of standout sport ahead. From the race for the top 4 'hotting' up in the Men's Premier League, to the increasing popularity of the Women's Super League, through to the Women's Euros and the Men's World Cup at the end of the year. 2022 will be a feast for the football fan. Throw in both the men's and women's Rugby Six Nations tournaments, Wimbledon, and the possibility of a Tyson Fury and/or Anthony Joshua big fight-night and you've got the recipe for success for pubs up and down the UK.

THE YEAR OF SPORT 2022

The publican

UK publicans think that the following sporting events will be the most profitable for their pubs in 2022

- 1** Men's Premier League football
- 2** Men's Rugby Six Nations
- 3** Men's UEFA Champions League Final
- 4** Men's FIFA World Cup 2022

Publicans agree that this year is going to be a profitable one for their business. Of those that currently show live sports, the majority believe that the Men's Premier League will be the most profitable, which is a testament to the regularity of income that weekly live football can bring – especially as the season is starting to reach its climax. Encouragingly, however, we see publicans putting great faith in the benefits of standalone tournaments and 'big finals' to bring in the customers. The Men's Rugby Six Nations and Champions League football finals look like they will be big business for publicans this year. This year is also a unique one for football fans as the FIFA World Cup moves to the end of the year, with the tournament kicking off on 21st November and the final on 18th December. It promises to add an extra dimension to the traditional festive period and will certainly be the creator of some unique atmospheres in pubs throughout the Christmas period. An opportunity not to be missed.



MAKING A SUCCESS OF LIVE SPORTS IN PUBS



Customers and publicans agree as to what make a great live sports pub 'great'. A combination of a quality set up (screens and sound) and being able to generate the atmosphere that sets it apart. Publicans, in general, place a higher level of importance on all these factors than customers but broadly speaking both parties are after the same thing. Whilst it may be relatively easier to ensure you're setup is top notch, it can be much harder to manufacture the elusive 'atmosphere' that sports fans crave.

One thing that is for certain is that the recent pandemic and subsequent lockdowns have forged new attitudes, behaviours, and expectations for customers. When it comes to watching sports on TV, we grew accustomed to watching the big games at home, alone, with friends and/or family and enjoying drinks and food either made at home or takeaways. Sports fans, therefore, want more than a simple replica of this experience when they venture out to a pub. They want something that they can't get at home. So of course, they want the bigger screens, and they want the rich sounds, because they want to feel like they are there – in the moment. They also want that buzz and that atmosphere that you just can't replicate at home. Quality of drinks also makes the top 5, for both customers and publicans, which shows that it's not just all about the sport – you've got to deliver on the basics too, and with each sports fan spending £30 on average on drinks per visit, the rewards for getting it right can certainly add up throughout the year.

Pubs should also consider introducing pre-booking and table service, if they haven't already, for these big occasions, as fans want to ensure that they can see the action and they also don't want to miss a second of it! If they're going to be leaving the confines of their homes, then they want to have some assurances that it won't mean they're going to miss out on what matters most.

Top 5 things that publicans believe customers want from pubs showing live sports



Top 5 things that customers want from pubs showing live sports



29%

Sports fans would like to be able to pre-book a table/seats with a guaranteed view of a screen

25%

Sports fans want table ordering & payment via mobiles – so they don't have to miss any of the action

65%

of publicans believe that showing sports in their pub has helped attract customers back to their venues since re-opening



CASE STUDY

BLUESTONE INN, IMMINGHAM

We are a sports-based bar in a fair-sized town, with a video wall, 2 x 50-inch screens and 4 smaller screens, showing all and any sport that is on, but obviously mainly English football.

The first key to success has been ensuring that all parts of the pub can show different games and also have different sound systems to allow commentary. This helps generate atmosphere all around.

The quality of screens and the ability to split the sound systems is a massive help to us, it allows us to create different atmospheres around the pub. It's been a significant investment but the feedback we get from customers is that watching sport at the Bluestone now far exceeds what they can have at home. Upgrading our screens and having best-in-class sound systems have been worth their investment, for sure.

The second key idea has been creating conversation around the games that people watch. For us, that means running prediction games, quizzes, and sweepstakes to add a little spice to the customer experience. Activities with drinks brands, apps like FANZO, and our own initiatives keep people engaged, even when their team is losing!

Being set up for sport on the screen isn't enough though. You have to shout about it. Even then, it's not just the new customers but reminding our regulars that game X or race Y is on and available. We're extremely active on social media, spend time educating our staff to be knowledgeable and engaged with sport, and use FANZO to get the word out.

Andy Clennet, Licensee of the Bluestone Inn in Immingham

82%

Of publicans don't currently do anything particular to encourage customers to watch live 'women's' sporting events in their pubs

80%

Of publicans don't currently do anything particular to encourage families to watch live sports in their pubs

11.7 million people in the UK watched England's semi-final defeat to the USA, at the 2019 Women's World Cup on TV and since then the women's game has not looked back. At the start of the 2021/22 season, Sky Sports announced a new 3-year deal as the primary broadcaster for the WSL and has the rights to show up to 44 matches per season. Alongside a minimum of 18 games per year to be aired on the BBC.

7.8M People will watch a Women's Super League game in a pub this year

8.8M People will watch a 2022 Women's European Championship game in a pub this year

6.2M People will watch a Women's 2022 Cricket World Cup match in a pub this year

7.3M People will watch a Women's Rugby Six Nations match in a pub this year

The 'big' tournaments appear to be the gateway for sports fans into watching more women's sports in pubs. With 8.8m people saying they will watch at least one game from the 2022 Euros in a pub this year. This is the set to be the most viewed sporting occasion but is closely followed by games in the WSL, the Cricket World Cup and Rugby Six Nations. All of these women's sporting events represent fantastic opportunities for pubs to bring in new sports fans to their venues. However, currently 82% of publicans don't currently do anything particular to encourage customers to watch live 'women's' sporting events in their pubs. Whilst it could be argued that they shouldn't have to do anything differently, it still remains that the women's game trails behind the men's when it comes to advertising and general awareness. So maybe pubs should be looking to do something different to attract customers to their pubs for these events. With the numbers we're talking about, it's clear that there are big rewards for those pubs who do go the extra mile

The same can be said for families. There is a perception that sporting events in pubs are reserved for a certain type of sports fan and that they may not always be the best place to take young children. However, we know that families with young children are incredibly valuable customers for pubs, with family dining occasions, in particular, representing a £3.3 billion opportunity for additional revenue in 2022 [source: KAM Family Dining Report]. Yet 8 in 10 publicans aren't doing anything, in particular, to attract families to their pubs for live sporting occasions. There is a great opportunity being missed here as, you could argue, their ceiling for spend on drinks AND food is higher for a family of four, for example than for a group of 4 friends.

BRINGING 'NEW' FANS TO THE PUB



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CASE STUDY

BEDS & BARS

Nailing opportunities around new audiences isn't something that can be done overnight - it's a process that takes patience and commitment. Don't expect to put Aussie Rules Footy on a Monday and have a full venue by the Tuesday" according to See Baron, Marketing Activations Manager at Beds & Bars.

Beds & Bars, an international group of sports bars, traditional pubs, and hostels, started by slowly changing the feel of their bars to be more inclusive and diverse. "We tailored the offering depending not just on the sport, but the general time of year and magnitude of the event. We premiumised what we were offering, selling an experience rather than a service to customers."

By reaching out to sports teams and supporter groups directly, Beds & Bars created fantastic relationships with the champions of 'niche' sports in their home cities. Taking AFL as an example, they wanted to ensure there was no better place to watch the match and then use social networks to tell AFL fan groups about that.

The booking system has been optimised to help both promote and streamline appealing to a wider audience. "By adding a specific booking type, eg, 'Women's Euros', it highlights to the consumer that we take the sport seriously and helps us manage the various events by knowing exactly why someone is coming to our venue. Booking numbers are through the roof, for both the blockbuster events and the smaller ones."

"The challenge is juggling a huge variety of sports all at once - staying on top and being honest with the consumer is the best way to be. If a customer books in for the F1 and there won't be commentary, they'll know that before they arrive so there are no unwelcome surprises."

Ultimately, it's all about consistency. If you're going to champion a 'niche' sport you have to constantly promote and provide an excellent experience for those customers, not just throwing the channel on when someone asks.

THE POWER OF SEARCH



4 Sports fans decide to go to a pub to watch a live sporting event 4 days in advance, on average

82% Sports fans have searched for a pub showing live sport online/via an app in the last 3 months

20% Sports fans use the FANZO app to find a pub showing live sport

67% Sports fans ended up visiting the last pub that they found when searching online/via an app

We've made the decision to go out to watch the 'big game', however, how do we choose a venue and, crucially, what are the best methods for operators and brands to influence this decision? 82% of consumers use at least one 'tool' to help them choose a venue. This represents a huge opportunity to influence the decision. General internet searching and the FANZO app are the main sources of help for sports fans. Brands and operators need to ensure they are targeting their customers through these channels. We need to be aware of the 'routes to information and influence' that sports fans are using – and invest time, effort, and money into maximising our reach as brands and operators. It's important too, to consider the different channels (i.e., web search, pub website, FANZO app, etc.) that your customers will be most likely using and the type of information that is most likely to impact and influence their decisions – for example are they looking for venues with multiple screens or one big screen, are they looking for venues showing obscure events or are they looking for a venue that they can pre-book only? Ensuring the right information is at their fingertips is critical in completing the customer journey from decision to venue. There's no quick fix though – it needs dedication to keep it up-to-date and relevant.



FINAL WHISTLE

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2022 promises to be a fantastic year for sport. With a strong chance of seeing some English teams in the latter stages of the big European football tournaments, a title face hotting up in both the men's Premier League and the WSL, not to mention a Christmas period like no other, with the FIFA Men's World Cup in Qatar.

The numbers speak for themselves, with tens of millions of fans looking to catch all of the action throughout the year. These are challenging times for many industries and the UK pub sector is no different. However, live sport represents a fantastic opportunity for pubs to offer fans, of all backgrounds, the chance to experience an atmosphere that is hard to replicate whilst sitting on your sofa at home.

One of the biggest challenges for many pubs is to convince customers to leave the confines of their homes and venture out to the pub. Live sport can be that catalyst. Our research also shows that if you can deliver on what sports fans want, then the rewards can be huge. Large groups, who visit frequently and spend big. Live sports has the power to help UK pubs hit a home run this summer and beyond.

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Blake Gladman
Strategy & Insight Director, KAM



ABOUT

FANZO

FORMERLY **MATCHPINT**

We understand the role sport plays in people's lives. The emotion it evokes, the unbreakable bonds it can forge and the life-affirming rush of absolute limbs, shared with people you care most about. Think Dier vs Colombia. Think Sexton in Paris. Think Raducanu ripping up the history books. At FANZO, those 'Where were you when...?' moments are what drive us. MatchPint was perfect if you needed a pub, any pub, with 5 mins 'til-kick-off. But we know that's just not how most fans live their lives. What you want is to plan the best possible afternoon for you, your mates and the game, as easily as possible. That's why we've designed FANZO to be the ultimate sports planning tool. It's personalised, not one size fits all. We'll find you the perfect venue, not just the closest. We cut out the guesswork and make organising your squad a painless task. We needed a new name to reflect this shift to something bigger, smarter and better. Something simple and universal, something that sounds like how a last-minute winner feels. Welcome to the FANZO era.

<https://www.fanzo.com/en-au>

KAM

Research and insight experts, providing the tools to understand your customer's journeys. Using consumer and operator research and insights to help identify the ways in which your business can improve. Whether your customer is the end consumer, an independent retailer or a hospitality operator, understanding and influencing the customer journey is vital to any business. Marketing (product, price, place and promotions) and people (field sales, BDMs, front-line staff, etc.) are the core elements at play. Our research and insight tools and services are designed to help you better understand why, where and how to create impactful and engaging customer journeys.

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