



# SPORTS VENUES

## *Redefining Hospitality*

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# INTRODUCTION

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Gone are the days of big open 'banquet style' spaces providing hospitality in sports venues. Today's customers demand much more from their event and hospitality experience.

The demographic of those attending live sporting events has shifted in recent years. A generation of millennials have voiced their preferences on how they want to consume and engage with sport. Various campaigns (e.g. the "This Girl Can" campaign) have played a part in making sports more relevant and accessible to women, and consequently there has been a significant increase in female sport participation and attendance at sporting events. Additionally, there has been a shift in user group attendance with more individuals and groups of friends taking up hospitality alongside corporate entities, who now also look for varying packages and numbers of seats to suit their client base.



# So, how have sports venues responded to the changing demands of today's customers?



The first challenge for venue owners is to decide what is right for them and to establish a brief that meets their specific objectives whilst maximising the potential from their fan base. Unfortunately, there is no 'one size fits all' solution to sports venues and all spaces developed should be supported by market research and demand analysis to establish the right mix of facilities and maximise usage on both event and non-event days. It is essential that any brief is underpinned by a robust business plan that will protect the long-term sustainability of the venue. This should include detailed cost and value analysis to ensure capital is spent in areas that will add most value and deliver greatest return.

Through the changing demands of hospitality, customers have created new challenges for designers of sports venues and it is now ever more important that the design supports the best possible event day experience. This starts from arrival at a venue, which needs to be smooth, easy and build a sense of excitement as one approaches, with a feeling that the venue represents the home of sport for the team that is playing there. This can be achieved by simple wayfinding signage to ensure a smooth transition to seats, food and beverage or WCs, and by utilising branding and graphics that promote the sport or team's belonging or history. Once inside,

design features need to captivate the audience and maximise fan engagement. This can be achieved through measures such as; brand touch points, LED screens providing exciting sporting moments and match facts and statistics, and Wi-Fi connectivity allowing an opportunity to engage with fans through gaming apps and other activities that may enhance the event experience.

The revenues from hospitality are key to ensuring the financial success and long-term sustainability of a sports venue. It is hence essential to get the design right, ensuring that the experience meets the demands of the various user groups. Less formal and more varied and flexible spaces are now being demanded by a newly emerging segment of attendees and these need to be catered for in flexible spaces that more effectively engage a wider range of people and interests by providing atmosphere, excitement and a few luxuries.



# So, how have sports venues responded to the changing demands of today's customers?



Differentiation of product is key to appeal to as wide an audience as possible, which can be achieved through the tiering of hospitality spaces from the basic general admission enhancement with standing buffet or pub-style dining, to top-level packages with silver service dining.

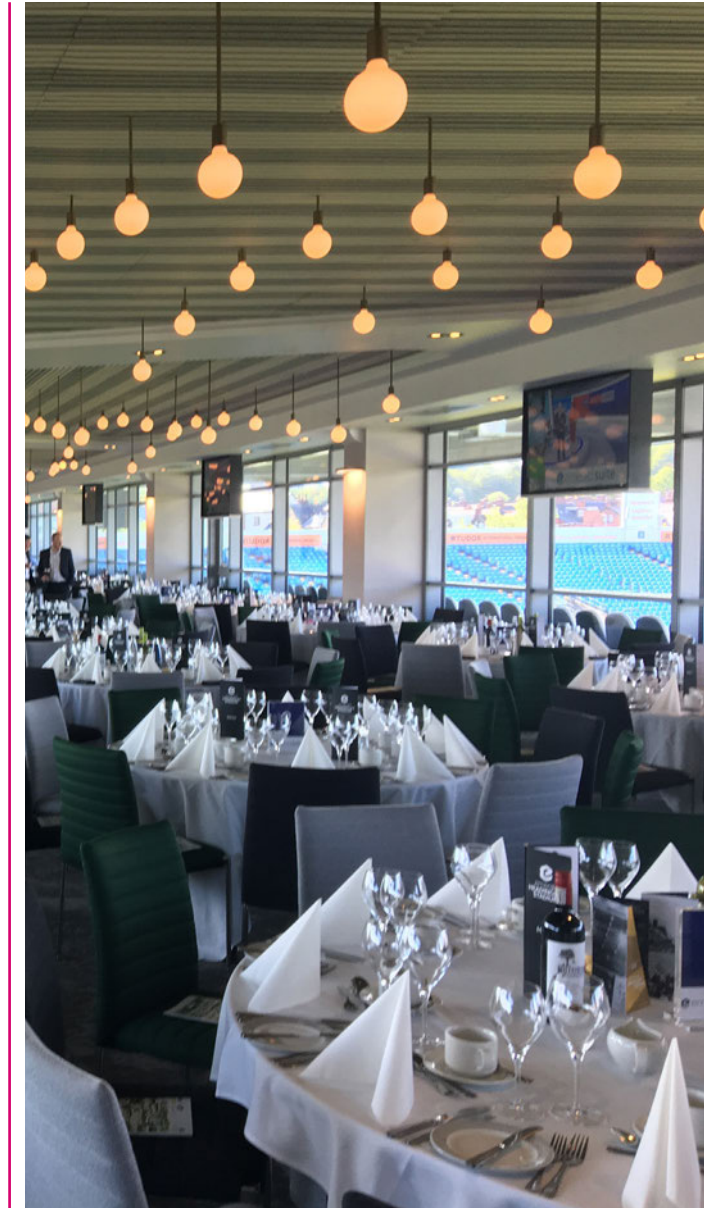
It is also important to define the criteria that dictates the level of hospitality and hence the ticket price point. Each space should have its own unique hospitality offering with exclusive style but with a common theme throughout all spaces, relevant to the sport. These criteria will vary depending on the particular sport and club but typically include the following:

- 1 *Access*
- 2 *View of pitch*
- 3 *Proximity to seat*
- 4 *Catering/food & wine offer*
- 5 *Interior design exclusivity*
- 6 *Brand identity*
- 7 *Link to rugby*
- 8 *Atmosphere*

The key is to ensure that the right mix of facilities is provided in an economical layout, and that tickets are provided at the right price point to match demand and the event day experience. Clever interior design is required by architects in order to create a sense of excitement and interest in the hospitality spaces, but product selection should be appropriate to usage and capital expenditure needs to be focussed on areas that will add real value. The durability of materials and their life cycle costs need to be considered in the selection process to ensure no under or over provision. The detailed assessment of these criteria, alongside cost benefit analysis studies, will help to ensure that value is delivered in the final solution.

As stated above, every venue is different and each will demand their own unique blend of facilities. However, careful consideration to the key ingredients outlined above is required to ensure sports venues of the future meet the changing demands of the next generation of customers.

We have worked with a number of sports and venues in recent years to ensure the delivery of optimum value, including Lord's Cricket Ground, the London Stadium, Emerald Headingley Stadium and the recently opened Twickenham East Stand development for which we have provided some further details below.



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Emerald Headingley Stadium Redevelopment



## Twickenham's new East Stand

With this ever more demanding trend from customers and competition from a wide variety of sports and venues, the Rugby Football Union (RFU) set about re-defining their hospitality offers to respond to these demands and provide world-class hospitality for match days as well as conferences and events on non-match days.

Twickenham's new East Stand extension is a multi-million pound redevelopment that has added over 6,700 sq m of new creative event space to the stadium, bringing the total event space to over 11,000 sq m. It includes eight brand new event spaces over six floors, each delivering a bespoke hospitality experience. The project provided a significant opportunity for the RFU to bring all hospitality inside the stadium rather than entertaining in tents and venues around the stadium. Enhancing the hospitality experience is likely to have a positive impact in helping to drive additional revenues and cement Twickenham's ongoing legacy.

Supported by their official hospitality agent Keith Prowse, the RFU looked to consolidate all their

hospitality into a world-class experience in the stadium with a tiered product mix that would create a new benchmark in hospitality and commensurate with the leading rugby stadium in the world.

*The work, which involved extending the stand outwards, upgraded levels 1 and 2 of the existing East Stand hospitality facility and saw the fit-out of the new build shell and core works to levels 3, 4, 4A and 5.*



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# A breakdown of the spaces created



## Levels 1 & 2

*(The Gate L1 and L2)*

The Level 1 and 2 hospitality zones are Twickenham's own chop-house style restaurants. These spaces offer a modern and elegant feel, with a dark and moody atmosphere. They provide the RFU with a solution to meet the hospitality needs of a modern stadium while ensuring a solution for year-round conferencing and events.

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## Level 1

*(The Union Ale House)*

This private debenture space epitomises the quintessential rugby pub with heavy rugby theming, memorabilia and simple wholehearted food offerings.



## Level 3

*(The Lock No.4 & No.5)*

Located in the mid-level of the new extension, these restaurants provide both clear views of the world famous pitch and views towards central London. The high level hospitality offering, achieved with state of the art bars, delicate interior fit-out and subtle rugby theming, provided the RFU with a perfect match for a modern take on authentic corporate hospitality.



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## Level 4

*(The Clubhouse)*

Giving the home of England Rugby its very own clubhouse, this space allows debenture guests to pick and choose their game day experience, opting between the 550 capacity restaurant, the clubhouse bars and the comprehensive food counter.





# A breakdown of the spaces created



## Level 4A *(The East Wing)*

The East Wing is the highest level of offering within the East Stand development, the ultimate in world class venue hospitality. The space features dual aspect restaurants, cocktail bars, and private dining spaces, whilst incorporating memorabilia and rugby theming throughout.

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## Level 5 *(British Airways Rose Garden)*

The British Airways Rose Garden provides an alternative match day experience through a covered roof terrace providing canapés, rotisserie and stone baked fired pizza pods, live music, views over London and an outdoor feel.





# CONCLUSION

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Whilst still having a place, it is clear that the 'Pie and Pint' approach is gradually being phased out in certain markets. With Twickenham's new East Stand helping to lead the way, choice and variety is now the order of the day. Historically, hospitality was about providing the best seat in the stadium. Now, there is more of a focus on creating a better environment and atmosphere. Greater emphasis is also being placed on the whole experience from arrival to post-match departure.

Twickenham's East Stand is driving value by differentiating its hospitality offering. Its tiered hospitality offering provides a range of options at different price points that will appeal to a wider demographic of hospitality users than it traditionally has.

Stadia hospitality space will continue evolving to keep pace with shifting preferences. Not too long ago stadium venues were designed under the assumption that 80-90% of attendees

would be male. However, an ever-increasing number of females are both taking part in and attending sporting events, encouraging stadium venues to diversify their hospitality offerings to account for a wider range of tastes. However, it is important to strike a balance between capital and revenue costs. A clever interior design and differentiation of spaces with a range of ticket price points is essential in order to appeal to as wide an audience as possible.



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