

Module 2. Facility models, EU market.

The table below shows the most significant averages when analyzing the stadium and arena business model in the EU market.

They are averages that serve as guidance and should be considered flexibly given the many factors that influence them during the season, and the continuous changes in facilities themselves. They will serve as a reference in the development of the module. They will serve as a reference in the development of the module.

Table 1: EU market averages (5 major leagues)

TABLE OF EU MARKET FIGURES (5 MAJOR LEAGUES)

	BUNDESLIGA	PREMIER LEAGUE	LA LIGA	SERIE A	LIGUE 1
Av. Stadium Capacity	48,000	39,000	36,000	35,000	32,000
Av. GA Ticket Price	35-40	65-70	55-60	40-45	30-35
Av. Premium Ticket Price	250-300	400-450	250-300	250-300	150-200
% Premium/Capacity	5-6	8-9	3-3.5	5-5.5	9
% VIP/Club	26/74	24/76	41/58	15/85	19/81
Av. Stadiums with NR	78%	35%	15%	18%	25%
Av. NR Price	3.5-4 mill	4.5-5 mill	5-6 mill	3-4 mill	3-4 mill
# F&B Concession stands	40	40	25	25	35
# Video Scoreboards	2	1	1-2	1-2	2
# TV screens	500	300	200	250	300

* all prices in euros

** average direct sales prices per game

*** the figures are approximate, due to continuous changes and renewals, depending on dates and games

**** GA = General admission, NR = Naming rights, F&B = food and beverage.

Source: Own elaboration.

Facility Models, EU market

In this module we are going to analyze the stadium model of European soccer's "Big Five": the Premier League (England), Bundesliga (Germany), LaLiga (Spain), Serie A (Italy) and Ligue 1 (France).

Of course, the facilities of Europe's five most important professional sports leagues do not perfectly represent the entire continent's sports facility industry, but it is the competitive environment where new industry trends have had the most impact, and where the evolution and development of the model has reached the most advanced standards.

Although the market is developed in five different countries, we are really talking about a single product, soccer, and about a very homogeneous territory. The five leagues have similar characteristics and significant differences, which mark the identity and profile of each model.



As with the analysis of the US market in the previous module, we will generally define each league, identifying the general model of each one of them, independently of the model profile that each stadium chooses individually, depending on the determining strategic analysis.

In this case, once we analyze each league's model, we will look at the overall revenue streams that support the models of the five leagues. We will be talking about a single sport, which, although it is developed in different leagues, forms part of a single market - European soccer.

For many years, European soccer stadiums have had a strictly athletic approach, and even in this approach, they did not show continuous evolution.

In the last two decades we have witnessed how the model has been changing, and today, the proposals go beyond a mere soccer field surrounded by stands, as we had before.

We must consider the key differences that exist between soccer and the professional sports format in the USA:

- Duration of the shortest game
- Continuous, uninterrupted play
- System of promotion and relegation

These three differences, in addition to other factors, have a direct impact on stadium designs.

Although they affect the model design, these differences do not justify opting for a strategy (or dispensing with it) with the lowest possible investment cost, without a plan with a profitability approach. We need to customize our model and balance investment with real income generation possibilities. And, above all, provide the necessary creativity to expand that potential with proposals that adapt to our event/sports model.

If we rank the five most important European soccer leagues in terms of attendance, we see two leagues that have the best fan experience in their stadiums: Bundesliga and the Premier League. They stand out in the first two positions. Between these two and the other three, there is a great distance. LaLiga is a little above Serie A and Ligue 1.

The cause may be a higher quality in the game and the teams. However, if we analyze the leagues in terms of the sporting results obtained by the clubs, the ranking does not come out the same.

If we were to rank the quality of the athletic event, of the teams and of the game itself, and based on the continental titles of recent years, LaLiga would be far above the rest of the leagues. Then we would have the Premier League, followed by Serie A and Bundesliga, and finally, at a long distance, the Ligue 1, which in terms of sporting results, would have to give up fifth place to Portugal's Primeira Liga.

This seems to be an enlightening indication of the importance of the fan experience in the current stadium model and for future models.



Although there is more focus on the sport than in other markets, and not so much on income generation and the fan experience inside the facility, the new models have a design based on a better balance of the three main objectives:

- Sports
- *Atmosphere/Fan experience*
- Revenue generation

In spite of this, in the designs of many of the five leagues' stadiums, the importance given to revenue stream implementation is far from ideal.

The work method, which lacks the integration of the whole team of professionals (business director of the club, marketing director, architect, etc.) from the very beginning of the project, has a direct impact on this point.

But in general, as we saw in the U.S. market, the stadium is conceived of as the cornerstone of the teams, in athletic, reputational, and economic terms. A stadium with an adequate business model can raise the competitive status of the team. And on the contrary, a facility with income generation limitations can impact the future of the athletic level of the club.

Moreover, in the European soccer model, the role the stadium plays in the final result of a game is more decisive. This is due to a sports format of continuous play with very pronounced peaks of passion (the goal), and the system of promotions and relegations, which maintains a high intensity competition until the end of the season, in most games. Therefore, designs seek to create that competitive advantage over rivals.

The aim is to bring the spectator closer to the pitch and "close" the stadium as much as possible, both around the perimeter of the stands and covering them with different types of roofing, seeking to create the boiler effect, which helps to pressure the rival team, as well as provide comfort to fans during adverse weather.

Image 1: Craven Cottage, London



Source: Doña, 2014. Own, unpublished archive.

This marks the difference from stadiums in the USA, where many designs choose to leave part of the bottom grandstand open to show the stadium from the outside, and also make it more attractive to fans inside by providing views of the city.

However, if we take the soccer league stadiums that we analyzed in the previous module as a reference, the impact of the type of sport is clearly seen. These stadiums implement elements of European soccer stadiums, such as proximity to the playing field and cheering sections on the ends for the most enthusiastic fans, adapting them to a more passionate sports model.

We also find a strong contrast in the range of capacity of European stadiums compared to the American market. We can find teams with a stadium capacity of 10,000 spectators in the same league as other teams with stadiums of more than 90,000 seats. This elasticity is due to the competition's business model. The European competition gives more priority to the sporting results - promotions and relegations - as opposed to a better balance in the overall business. The North American professional sports model prioritizes franchise licenses.

Some of the leagues have also boosted the undertaking of new stadium projects due to major international tournaments, with different results. But each one of them has reflected the evolution of the existing trend in their designs.

Therefore, the results, in addition to being different, reflect the good and the bad of each stage of the market.

It's clear that the general model is changing and the market accepts that the stadium is one of the key pillars on which to build club projects. The focus must be on fan satisfaction (the fan experience), which is constantly changing and increasingly demanding.

We are going to identify the most outstanding elements presented by each league in their stadium business model.



2.1 The Premier League

The stadium model in the English league is very identifiable. It has a lot of personality and has inspired several of the elements that have marked new design trends in recent projects.

Without a doubt, the majority of its stadiums are welcoming with a passionate and intimate atmosphere.

The typical English stadium is a concept that is in the collective mind of soccer fans around the world. But it's not just an expression that defines how you experience a game in England. Nowadays it is the essence of a product that the Premier League has been exporting for many years with unquestionable success.

The need to make the stadiums as covered and protected as possible, due to the islands' climate, turned out to be a virtue. The atmosphere created by this type of design is the driving force to communicate the passion of its fans during games.

Image 2: Goodison Park, Everton FC, Liverpool



Source: Doña, 2016. Own, unpublished archive.

The Premier League sells the passion that their stadiums project with resounding success, above the quality of the actual sports product. The result has a decisive impact on the rest of the club's revenue streams, such as television rights and sponsors.

English clubs have a clear objective, which is to take care of and preserve their stadiums as a symbol of the club and its fans, investing in them periodically to have them updated in terms of comfort, supply and facilities. They prioritize tradition and respect for their fields, offering the best experience to their fans in their usual stadium.

This is their priority. One advantage of this is that since English stadiums are usually many years old, they almost always have a privileged location near the city center that has been integrated in the urban landscape as the cities have evolved.

The number of new stadiums in the Premier League since 2000 is really low (comparable to the Spanish and Italian leagues). Not only are there few new openings, but its stadiums are the oldest among the five major leagues. However, the quality of its facilities, with a commercial proposal that is very focused on match day and on the fan experience, is far superior to the other leagues, and is only comparable to the German Bundesliga.

Their proposal is to maintain their traditional stadiums, with continuous modernization, as long as it continues to be viable. Once the stadium limits the growth of the club, they opt for plan B - the construction of a new facility (e.g.: Arsenal and Tottenham). But in both cases, we can clearly identify that in addition to implementing the revenue streams that were no longer possible in their old stadiums (Highbury and White Hart Lane), the two new designs (Emirates Stadium and New White Hart Lane) are stadiums with a passionate and intimate profile.

Even when the English have hosted an international tournament, they have tried to maintain this business model idea. The last soccer tournament to be held in England was the 1996 European Championship, where there was not a single new stadium built for the event. Yes, there were renovations and modernizations, but always respecting its model's profile.

Other events that have had an impact on its stadiums are the 2002 Commonwealth Games and the 2012 Olympic Games. In both cases, Manchester City and West Ham United opted for plan B and traveled to the main stadiums of each event. The first to Etihad Stadium, and the second to London Stadium, with major renovations in both cases to adapt them as much as possible to the English model.

Figure 3: Etihad Stadium, Manchester City, Manchester



Source: Doña, 2013. Own, unpublished archive.

On both occasions, it was clear that their historic facilities (Maine Road and Boleyn Ground) did not allow for the growth and long-term viability of either club's project.

Although the match day proposal in the Premier League stadiums is excellent, both in fan experience and how the revenue streams are applied, during the rest of the days of the year, the model is generally reduced to the basic streams. There is a strong focus on the club's stadium and museum tour, and all offer premium areas for use on non-match days. However, there lacks a profile with a greater commercial proposal in general, which we can find, almost exclusively, in Stamford Bridge in London.



2.2 Bundesliga

The Bundesliga stadium business model, even without achieving the levels of excellence of the U.S. stadiums market, is the perfect model for fans and clubs within the competitive environment of European soccer.

German stadiums have changed radically as a result of the 2006 World Cup. In this case, for the better. In other words, new projects were designed with a defined and realistic strategic plan, which sought the return on investment and the future economic viability of each project through the implementation of a customized business model.

This international tournament didn't cause any "white elephants".

But we're not just talking about the stadiums that hosted the World Cup. We're talking about the general model of all the stadiums in the Bundesliga. More than 80% of German league stadiums have been opened or rebuilt after 2000.

The business model is simple but enormously successful. It includes low prices - 40% lower than the Premier League and 30% lower than LaLiga - and quality stadiums, both in comfort and in commercial offering, with a high-level overall fan experience. It results in stadiums filled to capacity at every game, greater fan involvement and sense of belonging, which increases consumption in merchandising, services, food, and drink on match day, and higher income for sponsors. The icing on the cake is a perfect product for the sale of TV rights and the perfect environment to increase their share in social networks.

Image 4: Veltins Arena, Gelsenkirchen



Source: Doña, 2018. Own, unpublished archive.

When we talk about full stadiums, it is important to consider the relative reference figures. In this case, the average capacity of Bundesliga stadiums is the highest in Europe, at 20% above the Premier League, which ranks second. This reference shows the value of the attendance figures in German stadiums, since it is almost always 100% of the total capacity.

The business model profile is very complete. It focuses on the fan, providing a stadium profile with a passionate atmosphere, a corporate profile is very present in several of the stadiums (Mercedes-Benz Arena, Stuttgart; Esprit Arena, Düsseldorf), and it is multifunctional, with significant events on the calendar (Veltins Arena, Gelsenkirchen).

If we had to look for a weakness among German stadiums, it would be the low commercial profile of non-match days, beyond its corporate proposal. They have the

basics: the tour and museum visits, but most have no other activities on non-match days.

Image 5: Signal Iduna Park, Dortmund



Source: Doña, 2018. Own, unpublished archive.

The cause is probably a characteristic of the model that goes against the general trend: a large part of the stadiums are outside the urban environment. But it is clear that this aspect does not negatively affect the business model if we consider the attendance data that we mentioned before, which is a resounding success.

There is no doubt that German fans are accustomed to traveling to the stadiums, which are generally easily accessible, both by train with stations at the stadiums themselves, and by car.

2.3 LaLiga

The Spanish league has the most striking result in terms of stadium attendance vs. sporting results achieved by their clubs.

If we take the sporting result as a reference, in the last decade, the dominance of Spanish league teams has been overwhelming at the European level. However, the average attendance is barely 70%, far from Bundesliga and the Premier League, which are both above 90%, and closely followed by Serie A.

For years, Spanish stadiums have offered one of the poorest experiences on the market. Stadiums are not maintained or given minimum care, they are aged beyond their realistic life-span, which is high but lower than other leagues, such as the Premier League, and they have an almost non-existent commercial offering and services.

With this product, it is difficult to attract spectators and expect their loyalty. And it doesn't foster a sense of belonging among fans. In addition to all this, ticket price is high, just below the Premier League.

In all these years, the business model has been ordinary. It is difficult to define, since the product that is offered to the market is ordinary and lacks identity.

None of the profiles (intimate/passionate, corporate, multifunctional, commercial) have been applied in an outstanding way.

This situation, which has blocked the growth of the clubs' financial results, has changed slightly in recent years.

Through regulation, LaLiga has encouraged investment in the stadium image, seeking to improve the product to increase its market price for television rights internationally.

This has motivated a general "face lift", especially aimed at the aesthetic aspect of the facilities. However, the business model has not undergone any major transformations or advances.

The fan experience continues to be poor compared to other leagues, and there is still a long way to go to make the small growth in results that has been achieved with the aesthetic improvements sustainable, and expand it with the appropriate business model, achieving the clubs' potential level of income.

Income sources are almost exclusively reduced to ticketing, with one of the lowest premium offerings of the five leagues, to negligible income from food and beverage, and slightly greater income from sponsors.

Another figure worth noting, apart from average attendance, is the percentage of stadiums with naming rights in LaLiga, 15%. It is the lowest of the five leagues, and well behind European minor leagues.

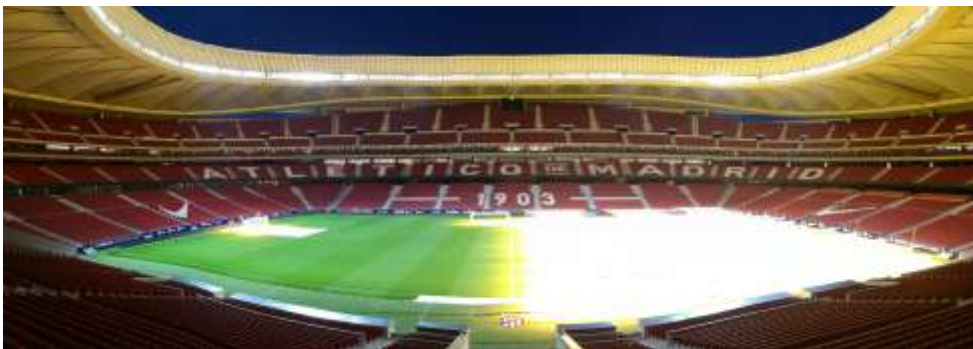
Image 6: San Mamés, Bilbao



Source: Doña, 2015. Own, unpublished archive.

Even so, overall improvement has increased with new projects inaugurated in recent years (San Mamés and Wanda Metropolitano). In the first case, the design of the business model has almost exclusively been limited to use on match day, as an intimate/passionate stadium, but with a very limited offering in other revenue streams, despite having an unbeatable location to develop another profile. And in the second case, we have a great corporate and multifunctional stadium that tries to maintain the spirit of the team's former stadium (Vicente Calderon).

Image 7: Wanda Metropolitano, Atlético de Madrid, Madrid



Source: Doña, 2017. Own, unpublished archive.

Most stadiums fill non-match days with a tour, a guided tour of the museum and official store, as basic revenue streams.

2.4 Serie A

The Italian league's stadiums are not much of an improvement over the Spanish league, although the scenario is somewhat different.

Italian league stadiums have a very long lifespan, having inaugurated only four stadiums since 2000.

The last international tournament organized on Italian soil was the 1990 World Cup, which left a trail of large investments with no return plan, in some cases demolishing old stadiums and building new ones and, in others, majorly renovating the existing ones. However, the model at the time, especially in the Italian market, was the same as it was 100 years earlier. Increasing capacity was the sole objective as far as the budget was concerned, even beyond its scope, unreasonably expanding capacity.

The athletics track was still included in new projects (Delle Alpi, Turin and San Nicola, Bari) when there was already enough data to know that the market trend for viable stadium projects was going in another direction.

In Italian soccer there has been a unique scenario that has impacted the development and evolution of this market: all stadiums, until recently, were publicly owned, and in addition, the most relevant teams shared their stadium with another team in the city. Today it continues to be so in several cases. This second point has a logical reasoning, which is that the most relevant teams are found in large cities, and due to demographic and economic capacity, there is always more than one team.

Image 8: Olympic Stadium, Rome



Source: Doña, 2010. Own, unpublished archive.

The mix of public investment - aggravated by the fear of Italian bureaucracy - and shared stadiums, has been an insurmountable obstacle for the Italian stadium industry during all these years.

The model has resulted in neglected stadiums, with no investment or modernization for years, and without a strategic or business plan.

In recent years, in light of the results of the competitive environment in European soccer, and alerted by the stagnation of Italian clubs in relation to their counterparts in the last two decades, there has been some change. Although it's happening very slowly, steps have been taken towards the transformation of the model.

Firstly, the change in ownership, with three new stadiums that have been carried out with the private investment of the club owners (Allianz Stadium, Juventus and Mapei Stadium, Sassuolo, in addition to Dacia Arena Udinese). We count Dacia Arena as new since it has been demolished and 90% of it rebuilt. To these, we must add several other proposals that are in the project phase.

And, secondly, the design of the business model now includes a viability plan and return on investment, and the implementation of revenue streams that were unthinkable in the previous model.

Image 9: Dacia Arena, Udine



Source: Doña, 2018. Own, unpublished archive.

It is also noteworthy that there have been some improvements in existing stadiums, which has brought some respite to clubs, which competed unfairly with the rest of the European leagues. For example, the amount of premium seats has increased exponentially, with customized renovations carried out in each stadium (e.g. San Siro, Milan and Inter, and Artemio Franchi, Fiorentina).

However, the neglected public stadiums that are sometimes shared affect the possibility of managing basic revenue streams such as the guided tour, the club museum and even the official store, resulting in stadiums that do not have them activated today.

2.5 Ligue 1

Ligue 1 is a special case, due to the proximity of the last international tournament organized on French soil, the 2016 Eurocup.

Until then, French league stadiums were similar to LaLiga and Serie A, with outdated facilities and obsolete business models, despite hosting the 1998 World Cup. In fact, five of the repeated facilities rebuilt their stadium (e.g. Groupama Stadium, Lyon; Orange Velodrome, Marseille) and the rest underwent major renovations, which changed the existing model.

The most common current model is directed at the corporate profile, especially for new projects, although it includes clear components of the multifunctional profile, seeking to offer innovative facilities that attract the greatest possible number and variety of events (Pierre Mauroy, Lille).

However, in older stadiums there is also a notable advance in the implementation of revenue streams, such as premium ticketing, which is higher than in the general European market.

The commercial profile is also very present, especially in four proposals. The first - Orange Velodrome in Marseille - is urban, very central, majorly renovated, with a commercial and residential development, in addition to the corporate profile. The second - Groupama Stadium in Lyon - is located in a developing area outside the urban landscape, in which the stadium itself will function as the driving force for the project. The third - Pierre Mauroy in Lille - is located in a commercial area and close to the university area, with its own commercial proposal annexed to the stadium. The fourth - Allianz Riviera in Nice - is located in a residential area of the city, with a shopping mall annexed to the stadium.

In the table of averages presented at the beginning of the module (Table 1 - page 1), we can find some noteworthy figures, which give us an idea of the market's general business model, in addition to the specific profiles we have mentioned.

One example is the acceptance of income generation through the commercial sale of naming rights. Although the overall percentage is only 25%, careful analysis of the data tells us that of the six new stadiums built since 1999, five of them have a naming, and the sixth, Pierre Mauroy in Lille, is in active search of one.

It is a clear indication of the solidity of this revenue stream in this market, which, if its stadiums were more modern, would undoubtedly be more extensive.

Another important figure, in addition to the high volume of premium seating mentioned before, is the ticket price. It's the lowest of the five major leagues.

In this case, we must consider that soccer is in competition with other sports such as rugby, with immense popularity throughout the country.

Except for the commercial profiles that we have highlighted, stadiums in general have done little to develop the commercial aspect of non-match day. The amount of premium spaces makes them opt for a corporate profile, but in most cases, stadiums lack other activities that could increase non-match day revenues.

The cause of this lack of development is that the oldest stadiums, in smaller towns or cities, are not centrally located even though they are considered urban stadiums.

One case that deserves special attention is the Matmut Atlantique in Bordeaux. This stadium's design includes a network of posts in the form of pillars, supporting the roof of the stadium. It is inspired by the nature of the landscape in which the stadium is located, functioning as the only façade of the building and distributed on all four sides. In this way, the main corridor is left open without any enclosure around the perimeter of the stadium.

The architectural visual effect is excellent. But it doesn't do much for the possibility of generating spaces that invite spectators to spend more time in the stadium before and after the event, or to make their stay more comfortable during the game and promote the consumption of food and drink. This is why it is important to integrate the architectural design decisions into the strategic plan and business model of the facility from the beginning of the project.

The entire Ligue 1 is an interesting reference to follow in the coming seasons. With the lowest average attendance of the "Big Five", the expectation with the new stadiums is a remarkable improvement in the experience and an increase in attendance, with the aim of reaching the Italian Serie A. But, until now it has not been the case. The analysis of the upcoming seasons, faced with this challenge, is a valuable testing ground for the stadium market.

We are going to go over the general conclusions of the revenue streams that support the models in the five leagues, as a single sport and market.

Location

In Europe, possible stadium locations are more conditioned by the usual urban planning of cities than in the North American market.

Acquiring a plot of land with the right location and access requirements, with at least 5 hectares in the center of a European city, is an almost impossible mission. Stadiums that are located close to the urban center were built when the city was not yet developed and were absorbed by its subsequent growth.

Therefore, the current tendency to build stadiums in the center of cities (downtown) in the North American market is altered in the European market, although this does not mean that urban locations are out of the question.

The most widespread proposal is to look for urban areas - not necessarily in the center - that are easily accessible, or areas where there is commercial development or leisure and entertainment.

Grandstand ticketing



Price policies, as we have already seen in the analysis of each league, are very varied. In the table of averages, we can clearly see that the proposals differ from each other, and each is integrated into the business model according to the established strategy.

At the commercial level, however, there is more homogeneity, although a single approach for the whole market would not be wise.

The most common features are:

- Price based only on the location in the stands, without segmentation by different experiences that can be offered in each section of the stadium.
- Creation of a cheering section, concentrating the most enthusiastic or passionate fans in a section - usually at one of the ends - with the aim of creating a greater atmosphere and having greater control over them.
- Creation of a family section, with increasingly more services. This proposal is not found in all stadiums but making it more affordable for all family members to attend is a growing trend.
- Price assignment based on the importance of the game and the timing of the season. There are already clubs that opt for the "dynamic price" system, although it is far from being a fully widespread practice.

Premium seating

In premium seating we also find noticeable differences, although in this case there is more unanimity in recently inaugurated stadiums and projects in progress.

The figures for new projects in four out of the five leagues are in line with the market average (8-10%). Only LaLiga is reluctant to expand this revenue stream, which is an essential part of the income in modern stadium models and has been for many seasons now. Only Atlético de Madrid's Wanda Metropolitano reaches 10%, which represents the market trend.

Similarly, in the distribution between VIP and Club, LaLiga is the only league that remains far from the current trend, dedicating almost the same amount of seats to private boxes as to those of shared premium areas.

Unlike the U.S. market, the range of products is generally scarce, with little differentiation in experiences. However, there are stadiums that have a wide range, designed to attract the entire potential premium market (Anfield, Liverpool; Old Trafford, Manchester United).

Image 10: Old Trafford, Manchester



Source: Doña, 2013. Own, unpublished archive.

The relatively low figure in Bundesliga stadiums (5-6%) is a conservative move, as most of them were built at the beginning of 2000, when the product was not as developed in Europe.

Overall, the design of the proposals and services is high-level, with proposals of haute cuisine, variety in food and beverage options, and the minimum exclusivity and comfort required for each product.

A notable difference in the designs of U.S. stadiums is the decorative style and the quality of the materials. The American market values the luxurious proposal, with the use of higher quality materials. In Europe this is not valued by customers, who prefer good quality, without excessive luxuries, and look for functionality. It is an example of how each type of product should be customized according to the profile of the customers/fans.

Food and beverage

The food and beverage proposal is far from the one we find in the US model.

The average number of concession stands and kiosks is 7 times less than in U.S. professional league stadiums, and the variety of products, by extension, is also very limited. As we have seen before, the format of American sports encourages greater consumption of food and beverage, and this creates a clear difference between the two markets. But even so, European stadiums still have a long way to go to reach their full potential in this section.

However, growth in this revenue stream, especially in the Premier League and Bundesliga, is well above the other three leagues.

Apart from the stadium business model, there is another reason for this. In Spain and France, the sale of alcohol, even beer, inside stadiums (with the exception of premium areas) is prohibited. And in Italy, even though the sale of beer with an alcohol content of less than 5% is allowed, city hall always has the last word before each game, and

can prohibit its sale, not only in the stadium, but in surrounding areas spanning several miles.

In any case, it is not the only cause, nor an excuse for a really poor overall offering in this revenue stream.

Naming rights and Sponsors

Due to its behavior, naming rights must be analyzed beyond the general data that we find in the table of averages.

The Bundesliga naming market has developed in an exemplary way, with 78% of the stadiums with a naming. The formula is ideal for arousing brand interest in this product: quality stadiums, seriousness and transparency in management, good audience ratings, and, above all, full stands at all games with an enviable atmosphere in all stadiums.

The other four leagues have a common handicap: the average age of their facilities, which sometimes makes them unattractive due to poor conditions (LaLiga and Serie A in particular), and whose names are deeply rooted in the minds of fans and the general public.

However, if we analyze the stadiums inaugurated in the last decade in all four leagues, we will see that, except in the Spanish league, almost 100% of them have sold the commercial rights to their names.

The rest of the sponsorship market is very focused on the club's partner role, rather than the stadium. Only technology partners have a greater association with the stadium, as the agreement usually includes the connectivity design within the facility.

Sponsorship of premium areas, access doors, sponsorship platforms in the stands and corridors, and other spaces, are yet to be developed in most facilities, unlike the American market where it is a well-established product and generates an important amount of income for stadiums.

Another product for sponsors is the individual naming of different sections of the grandstand, which is present in the European market, although it's not too widespread. Bundesliga has adopted this product the most (e.g. Veltins Arena, Gelsenkirchen; Opel Arena, Mainz).

Audiovisuals and connectivity

The audiovisual proposal is hardly developed because the business model includes almost no pre- and postgame. The scarce food and beverage offering and points of sale, together with the format of soccer itself (continuous play without stopping the clock and a short half time), makes the investment unattractive for clubs.

Image 11: Commerzbank Arena, Frankfurt





Source: Doña, 2018. Own, unpublished archive.

With this proposal an important element in the creation of the fan experience is lost. But in order to be able to develop it and turn it into a more relevant revenue stream, the whole model must be reworked, creating the necessary conditions so that fans can enjoy the projections and the interaction with the video scoreboards, making it profitable.

The regulation on the prohibition to repeat plays is surely coming to an end, thanks to the launch of the new VAR, which could also become a supporter of this system.

Connectivity is general in all five leagues. Even so, simultaneous coverage is not as high as it could be, and it is a section to be improved. But in general, both new and older stadiums offer this service as mandatory.

Merchandising, tour, and museum

The guided tour of the stadium and visit to the club museum is the most widespread product.

It is difficult to find a stadium in the five leagues that does not offer this product on non-match days. The social roots of soccer and its long history on the European continent provide an excellent setting to design this experience for fans, groups, businesses, and all types of visitors.

It is a revenue stream that works, in many cases, as an anchor for the rest of the commercial offering on non-match days, due to the importance of the stadium itself or the history of the club.

Each visit ends at the club's official shop, in an attempt to further capitalize on the fans' tour through the stadium. Merchandising is a very widespread revenue stream for all clubs in the five major leagues. However, proactive selling, beyond the official store, is not as developed or enhanced as it is in stadiums in the USA.

In almost 90% of the facilities, the only point of sale we find is the official store, which in many cases is not accessible from inside the stadium. The lack of strategically located kiosks throughout the various levels of the stadium and in premium areas is a clear loss of a market opportunity.

Multifunctionality

Increasingly, project designs include the necessary conditions to host all types of events.

The most recent stadiums in the five leagues have a profile in which multifunctionality features play a more or less important role.

Beyond this general adaptation in the latest additions, some stadiums in the European market have opted for a clear multifunctionality strategy, investing in retractable roofs or mobile playing field systems to facilitate operations and preserve the quality conditions of the field (Veltins Arena, Gelsenkirchen; Pierre Mauroy, Lille; Esprit Arena, Düsseldorf; New White Hart Lane, London).

Environmental sustainability

European market awareness is high, not only in the stadiums of the five major leagues, but also in other well-known facilities such as the Johan Cruyff Arena (Ajax) in Amsterdam, a reference in sustainability, or Aviva Stadium in Dublin, or Antalya Arena, in Antalyaspor, Turkey.

The commitment to sustainability is part of the model of new projects with well-known cases such as the London Stadium in the Premier League; San Mamés in Bilbao, in LaLiga; Signal Iduna Park, Dortmund, in Bundesliga; Allianz Riviera in Nice, in Ligue 1 or Allianz Stadium, Turin, in Serie A.

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