

Opportunities in Communications to #BuildBackBetter



Status Quo June 2020

While some sports have returned to the field of play, we know we are not out of the woods. We in fact, don't know how far through we are or how long it may take to get to the next clearing, but must take what we know and work with what we can to chart our path.

Some operations issues in returning fans to the stands will be 'solved' with technology, logistics adjustments or clear procedures that are already being adopted and can be readily shared across leagues. Others will require more of a personal touch and an array of customized approaches - team by team and city by city. These are fan communications and partnership fulfillment.

These relationships don't have an off-season, and the conditions around managing them will unfold in waves as we move from one 'state of play' to the next. And every stage will be overlaid with a complex set of evolving social, economic and environmental conditions.



Fan Communications

As fans return to venues there will be changes. Changes in their feelings and expectations about the live event experience. Changes in the way those venues operate. In this window of unfamiliarity there is opportunity as well.

Fans will bring **heightened attention to information** they previously ignored, much as we suddenly paid greater attention to flight attendants safety briefings after 9/11. Everyone will be operating under a modified game day routine with higher expectations. The definition of fan comfort has expanded to include perception of health and safety and will be taken into account across the board.

This is a key window to communicate not only **what** you are doing differently or more intensively in your venue, but **how** you are doing it in a concise, but respectful and reassuring way. You must go beyond posting standard (and likely in many cases required) health department signage to establish an atmosphere of confidence and comfort. This is an excellent time to **explore and test messaging internally** that meets critical informational purposes but also helps 'lighten the mood' and lessen anxiety. Naturally you will need to consider the specific concerns of your fan base relative to the situation in your market to guide you.

Consider the channels at your disposal: social, digital, traditional and in-venue media. For those sports not yet returned to play, the first two are your leverage points. As interactive media, they can serve the dual purpose of enabling you to survey and poll your fans to inform your communications, as well as keep you connected to them during the gap in live action and begin building confidence for when it's time to invite fans back through the turnstile.

Teams are no doubt adapting messaging in venue, on websites and in apps, but are you also considering **potential new media that will emerge** such as hand-sanitizing stations and queueing areas?



Consider the key messages you must convey (per public health laws) and the key messages you want to convey (we treasure our fans and your safety and health are paramount to us). The 'musts' will likely be directed by your city, county and/or your league in terms of language and location. In the rush to meet whatever requirements are set out, don't forget your 'brand' and 'voice' -- part of welcoming fans back is reaffirming the sense of community and shared identity that we gain from coming together for our team and with our fellow fans. Slapping up boilerplate language that is incongruent with your brand and voice will have more of a jarring than a comforting effect.

Keep in mind the moments when fans will potentially have more peaked anxiety -- at the gate, in the restrooms, at concession counters - and begin now to defuse the anxiety and tension they may be feeling by reminding them where they are and who they are with - at a place of community and joy, with friends, neighbors -- their 'people'.

Craft messages that keep that spirit in mind. Avoid 'directions' ('Fans! Wash Your Hands!'). While we all intuitively understand the need for these, the past few months have made us weary of all these new 'commands'.

For location based messaging :





For scoreboard graphics and announcements: Skip the monotone, 'Dad-voice' public service announcements. Have your animation / digital team work up a few cartoons and your gameday presenters draft up some clever scripts. Jingles even. We know they're effective at sticking in our heads. Thanks to Schoolhouse Rock, an entire generation can sing the Preamble to the Constitution.

Sports are fun. Sports are a diversion. Especially from the demands and concerns of the everyday. Entertain while informing. Point out services that you are providing to make the game more enjoyable.

Sport is also a role model and unifier. Model the behaviors that will not only make fans comfortable, but that we want fans to practice. Follow the methods described in the [Fan Engagement for Sustainable Behavior Change Playbook](#) to develop campaigns meant to drive fan behavior at home, work, and play.



Corporate Partnerships

While the #BuildBackBetter series is largely centered around risks and opportunities post-pandemic, as we write this final section a second crisis has emerged worldwide as our long neglect of addressing racial equity has landed loudly on the doorstep of communities around the world. These seismic shifts - alongside the climate emergency and a looming economic recession - are critical in informing teams', leagues' and events' relationships with their partners going forward.

One of the greatest risks to the sustainability agenda in sports is the endangered fiscal health of organizations right now. As partnerships form a critical component of revenues for the immediate to mid-term, we are addressing this topic at a more holistic, macro level in addition to highlighting some specific opportunities as we move toward a return to the stands.

The shifting media and messaging landscape

It's important to put the implications for partnership fulfillment and activation in the context of several developments in the consumer marketing and sports partnerships space of the past few years (and in some cases the past few weeks):

- **Increasing focus on 'purpose' themes as citizens' concerns around climate, social and community issues grows**

Consumer and B2B brands' slow, but continuous momentum toward purpose as part of their values and core messaging has now given way to a landslide. In an IAB study last week (as reported by GumGum Sports), 63% of top brands are rapidly adjusting their primary advertising messaging. 42% indicated they are shifting to messaging on mission and purpose. 41% are moving to showcase causes they support. This was evident in a single day - #BlackoutTuesday - by the actions of hundreds of consumer brands, who, overnight, pivoted their global messaging across all possible channels to focus on a single issue as well as the notable move by adidas to stand with and amplify rival Nike's statements on the issue.

- **Scrutiny from outside (social media) and inside (employee activism)**

In the Mad Men era, companies carefully crafted a brand identity, a cultivated look and smartly crafted copy, and presented it to us in a shiny package. We did not - or chose not - to look behind the facade. Today, as consumers we have the tools and increasingly the motivation to verify their claims and hold them accountable. June 2020 brought this to a new level as evidenced by a public access document that began circulating following #BlackoutTuesday (June 2, 2020) to inform consumers on Brand Responses to the #BlackLivesMatter protests. Calls for action and accountability are coming from inside the building as well through increasing employee activism. A 2019 poll by PR firm Weber Shandwick found that 38% of employees surveyed have "spoken up to support or criticize their employers' actions over a controversial issue that affects society".

- **Massive shift to digital over traditional assets**

In 2019, digital advertising expenditures surpassed traditional advertising (TV, print, radio, outdoor) for the first time and that shows no sign of slowing even as financial fallout from the pandemic is taken into account. Most teams understand this but have nonetheless continued to push bundled traditional media in sponsorship packages. It's likely going forward that this inventory will continue to decline in attractiveness (certainly it lacks the responsiveness/agility brands need for the situations outlined above) and may become an asset better suited for local partners where the reach is adequate and the ROI is more readily assessed.

- **Partnerships will be increasingly 'fluid'**

ABInBev, in the face of declining beer sales and managing a complex portfolio (over 350 partnerships in North America alone), stunned the sports and entertainment world in 2018 with its move to performance-based agreements. According to Nick Kelly, Head of U.S. Sports Marketing, the brand can no longer compensate properties based on 'presence' alone. They aren't investing for 'awareness' they are investing in sports for returns. Much like an athlete's salary, contracts incentivize and compensate teams whose efforts move the needle on sales and provide additional exposure either through creative activations or performance on the field that extended the season. Shortly thereafter the adidas/Man United deal took a similar approach. Nike/Liverpool followed suit a few days ago. In reporting on that deal, Sports Illustrated indicated this is likely to gain rapid adoption in part due to the economic fallout of the coronavirus. Sponsors are eyeing performance metrics more closely in light of downward revenue/tightening budget pressures. These may also prompt sponsorship portfolio reviews.

- **Consumer/Fan Values in Action**

As noted above, brands are responding to wholesale shifts in consumer sentiment. Prioritizing social, environmental and economic issues has gone mainstream. A recent poll by the Shelton Group indicated 86% of Americans expect brands to stand for more than profits. Taking a stand on human rights and climate issues has also become more than vocal. The Edelman Trust Barometer 2020 indicated that 65% of global consumers indicated that a company's response to the pandemic crisis will influence their future buying decisions. Comments from Dallas Mavericks 'Governor' Mark Cuban on CNBC echoed that sentiment. And the #BlackLivesMatter Brand Response tracker noted above is just one of many ways consumers are keeping score and empowering themselves to inform their spending choices.

The Market Impact of Social Values

When Nike launched its now famous Colin Kaepernick ad during the the 2019 NFL season opening game, some fans who disagreed took to social media, burning their shoes and vowing to never buy the brand again. In the days after first airing, Nike's stock rose 4%, hitting an all-time high as retail investors showed their agreement with the firm's boldly stated principles. One year on, according to Fast Company magazine 'the company claimed \$163 million in earned media, a \$6 billion brand value increase and a 31% boost in sales.

When companies are on the wrong side of an issue in the community's eyes it can be costly - quickly. Global boycotts occur at the drop of a hashtag. In January 2017, taxi drivers refused to service New York's JFK Airport in solidarity with protesters over the U.S Government's sudden and arbitrary entry ban for travellers from seven Muslim countries. Uber drivers did not join the cabbies. Furious customers accused Uber of profiting off the strike and the #DeleteUber hashtag emerged on Twitter. On the eve of an IPO, Uber was forced to disclose in its stock filings that "As a result of the #DeleteUber campaign, hundreds of thousands of customers stopped using the Uber platform within days". While the lower than expected IPO for the company was not fully the result of that campaign, it was one of the many social values missteps of the company that impacted its appeal to consumers and investors.



Key Insights

1. Partners are becoming exceptionally careful with their brands - safeguarding both core values and budgets
2. Fans are watching closely how organizations (teams and brands) are responding to current events.
3. This is a critical time to be on the same page philosophically, not just in terms of your contracts.

The observations and ideas below reflect the socio-cultural, economic and environmental realities of what lies ahead for teams in the partnerships space. They include a mix of caution, candor and optimism that we feel best serves the days that lie ahead in helping us to serve fans and sports partners as we build back better to preserve the games we love for the next generation.

Navigating Changing Seas

The reality of right now is that teams are unable to deliver on sponsor contracts as written in the absence of live play. Negotiated partnership reductions are happening now. It is difficult to imagine doing more, or differently with limited resources and great uncertainties. One thing is certain however: change. And among the many areas of operations that will be subject to adjustment, partnerships offer some of the most immediate opportunity for upside. In part because you are able to act on it now.

What to focus on now

Be selfless, and be present in order to stay relevant.

You cannot deliver the gameday assets and broadcast inventory stipulated in the contract but you can **provide your platform to help partners communicate their community-focused efforts**. Lend the 'community brand' of the team by looking for on-brand, creative ways to share these messages. This is an especially powerful time to help your partners go 'deeper' and 'richer' in their messaging to the local/regional market and build brand equity so that revenue they cannot log today may be better secured for tomorrow. Key to this will be to ensure you are tracking all metrics - not just your own channels, but all mentions - to provide greater value from a 'smaller' play.

Invite fans to share their 'community stories' of how they supported others during the pandemic on your social channels **to maintain a socially relevant and interactive conversation** going about this shared experience. Step into the team's role as a community convenor. You will also find that the user-generated content will provide an outstanding digital record and can be shown on the big screen as a way to celebrate your reunion when the time comes.

Make a positive impact with every action and every partnership

Brands are looking for partners who share their values and, driven by market demand, they want to share these values with the public. In some cases, this provides an opportunity for teams to find new footing with both operational and community initiatives and platforms. In others, it provides an important point of alignment with existing and potential partners.

This is a strong opportunity to **leverage your 'sustainability' approach as it highlights your own environmental and social commitments** in action. If your organization up to now has been limited to specific suppliers of sustainability solutions, the current situation is a good occasion **to bring these forward to relevant mainstream partners**. Do the homework on your existing and prospective partners to see where their values and commitments lie. Natural fits include:

Water Conservation Efforts	Alcoholic and Non Alcoholic Beverage Partners, Investment, Banking, Restroom Fixtures, Lawn and Landscape Maintenance
Energy	Home Appliances, Automotive, Utilities, Investment, Banking
Transportation incl. Active/Public Transit	Automotive, Athletic Apparel, Healthcare, Insurance
Food	Grocers/Retailers, Food & Non-Alcoholic Beverage Brands, Consumer Packaged Goods, Online Publishers, Home Appliances, Healthcare



Be honest, be authentic.

Authenticity is important when it comes to actions, messaging, and partnerships. Covid-19 safety measures not included, sometimes being authentic means communicating about progress over perfection. It is important to talk to fans about steps being taken towards all facets of sustainability and community wellbeing even when you know there is more to be done.

The power of sport in sustainability comes from the position and size of its platform. Holding back about what your club is doing misses an opportunity to connect with and inspire fans along their journey towards sustainability, wherever they may be. Hesitancy about feedback is understandable, especially given the culture of scrutiny we addressed earlier. Rather than opting for silence to avoid questions, **be honest with fans about what you are striving for and where you are in the process.**

Return to Play

New Asset Classes, Viewership Intensity

A novel concept emerged recently in the sponsorship space: whitespace valuation, the assessment of the revenue potential of areas such as empty stands where sponsor messaging can be placed physically via tarps or digitally overlaid.

Case studies from GumGum Sports on Bundesliga and NASCAR cite the mandatory masks as especially prime inventory due to the intensified focus on drivers and team personnel in the absence of fans. Tallying up the minutes of screen time and higher than normal broadcast audiences, both GumGum and Nielsen are highlighting the value of this inventory for teams - and their partners.

The early winners in this are naturally the sports who will return first as they are also seeing a viewership bump well beyond their typical audience. The Bundesliga doubled their average domestic audience and attracted 1.3 M international fans (vs past intl audience figure TBD). Viewership for Borussia Dortmund-Schalke was 5x of a typical matchup.

Social/Digital/Text

As live action returns, traffic on these channels will naturally ramp up. Working with partners now to explore how to 'connect' fans more closely to the action will demonstrate to brands that you are proactively working to meet your obligations with alternate inventory.

This is also a **prime time to leverage players more heavily**, especially where common ground exists between a partner's causes and a player's. Like all of us, players have been through a lot - and while always passionate about community and causes, they may be prioritizing their time to become even more involved.

Beyond this, this is also a good time to bring ideas forward for players to be engaged with interactive content plays - Ask Me Anything sessions, gaming or similar events. They miss the fans just as much as the fans miss them, and partners are likely to appreciate the opportunity to be part of these moments of connection.

Games typically played in stadium (i.e. 3 card monte), as well as new ones designed for at-home or remote viewers and available through the team app, are a strong way to both connect fans and deliver engagement metrics to partners in this in-between time. These are also an asset that can be carried forward when fans come back.

Digital assets with **activation components outside of game day** create more resilience within partnerships and more touch points between teams, brands, and fans. This is important for two reasons. One, it is a way to preserve ROI for partners if events do not take place and slightly lessens the burden of “make goods” felt by many partnership teams. Two, where a team or brand’s goal is to truly drive sustainable behavior change at home, work, and play; campaigns should reflect that with **360 degrees of touchpoints 365 days of the year**.

Fans Return to Stands

While the temptation may be great to revert to the old playbook as business begins to resemble what it once was, we advise you to review the points above about the seismic shifts in the world, as well as to seize the opportunity to #BuildBackBetter and surprise and delight fans with ways you are considering their ‘whole’ experience with you.



New Era Activation Points

The following is a composite list of potential points of activation either created or enhanced by Covid-19 measures detailed in preceding sections of this series.

Transportation

For urban stadiums especially, transportation-based engagement tools and partners to help/motivate fans to arrive to the game can be more important -- and exciting -- than ever. Examples include:

- Park-and-ride services creating novel “fan ride” experiences for fans, e.g. Houston Dynamo Rally Bus. Rides could be a complete partnered experience with service, tickets, food and beverage, and in-transit entertainment
- Surprise & delight transit users, e.g. Get Caught on transit in your jersey, Oakland A's BART Rider of the Game
- Free transit and/or bike share rides with game day ticket and contests around use outside of gameday, e.g. Houston Dynamo and Dash
- Priority entry for fans using forms of active transit
- Branded walking/biking routes to stadium from popular starting points
- User generated content for big screen display/in broadcast display ‘virtual rewards’ for active transportation; e.g. ‘Get Caught Traveling’ to basketball games, ‘Take a Walk’ to baseball games
- Challenges and rewards programs for ride hailing, cycling, scootering, walking

Ingress/Egress

While stadium entry is not often a notable part of the game day experience, heightened consciousness to this area calls requires that more attention be given to the fan experience. It also creates additional partnership opportunities. Opportunities include:

- ‘Arrival zones’ and screening sites, expanded stadium perimeters, and entry windows create additional inventory and activation space
- Increased value of gate/entry naming rights as points of entry will likely be assigned
- Opportunities to gamify social distancing with added signage/station media - options abound to turn social distancing markers into games, e.g. ‘hopscotch’ lines between lineup markers, ‘Burma Shave’ signs, trivia questions with answers spaces ahead
- Increased visibility for healthcare or insurance partners with heightened awareness and ingress health screenings; the fact that COVID-19 has, for many, been an invisible threat is an opportunity to truly highlight preventative care, health & wellness and fitness. With carefully chosen language and working in concert with these types of partners, sports provides the positive environment to highlight looking after yourself.

Food & Beverage

When it comes to food, Covid-19 has brought attention to nutrition, supply chains, and food security. This awareness is important for progress towards many sustainability-based goals, particularly related to community health and resilience, and creates opportunities for stadium food-service. Examples include:

- Highlighting healthy menu items. Look to partner with a community group or local hospital system who has a nutrition program or campaign, e.g. [Ochsner Eat Fit](#)
- Providing plant-based options and making them available at all/most food locations, not just select spots
- Sourcing local and “featuring” ingredients or vendors with storytelling around the farm or business from which a local item is sourced and, therefore, local business supported. See [Sacramento’s Golden 1 Center](#) that sources 90% of ingredients from within 150 miles
- Growing food on-site, using what you can in stadium food prep (i.e. [the Pittsburgh Pirates’ Rivendale Patio Garden](#)), and encouraging fans to eat local or try growing food at home as well. These programs provide good activations for partnerships with local farms/farmers markets, garden or home improvement stores.
- Recovering game day food to be given to local shelters and food banks, a practice that prevents waste and helps with local food insecurity issues. In some cases where this already occurs, fans have reported it as one of the highest-liked sustainability initiatives
- Implementing reuse systems like [r.Cup](#) creates recoverable assets and draws increased attention to this item and associated partners

Restrooms

Restrooms as sponsored assets were becoming more popular with water and hygiene product partnerships like [Sloan and Wrigley Field](#) and [Essity and the Philadelphia Eagles](#). The importance of these partnerships and points of communications has increased and can include items such as:

- Signage, videos and even voice-overs of athletes encouraging proper handwashing techniques and providing novel ‘hand-wash-timing’ tricks, i.e. team-based songs or sayings to replace “happy birthday”
- Occupancy sensors with displays to showcase the density of people inside to guide a fan’s decision of whether to enter or wait outside the door
- “Touchless restroom experiences” provided by... creating a sanitary - and resource efficient - restroom experience for fans. These partnerships serve dual purpose: providing exposure to the brand while ensuring fans their health and safety are considered and taken care of while at your venue

Any and all solutions providers can be courted for some level of partnership, which can be fulfilled through inclusion on signage (example hand-sanitizing stations) as well as virtual assets. New normal operations will create outstanding opportunities for product placement of solutions that will be part of public spaces going forward. Many new opportunities will come from B2B companies who are not as adept at consumer-facing messaging, a value that the partnership provides as your team aids in developing their 'entertain while informing' capabilities.

As you work through the stages of returning to the game day as we knew it, there are a lot of factors in play, many beyond your control but nonetheless affecting your ability to deliver a terrific fan experience and exceptional partner value. These make it difficult to see a clear path to 'getting it right' but your guidepost should include transparency, honesty and even humor as you approach the highly collaborative problem-solving that lies ahead.

What should you be doing right now?

1. Partnerships teams should be doing a 'deep dive' on partner companies' actions and messaging of the last 12 months, and especially of the last 4, around the pandemic and Black Lives Matter movement.
2. Be prepared to discuss and disclose your own organization's responses and messaging on these issues and to ensure you are able (permitted, cleared and prepared) to do so
3. Open proactive and collaborative solution-seeking discussions now with your partners - taking a wait-and-see stance or adopting 'we're in a holding pattern' response framework is a precarious strategy.
1. If you aren't already, examine your obligations as they stand and work through contingency planning for delivering alternate or deferred inventory. Where it's within your discretion, explore modified payment terms (before the partner approaches you on this).
2. Build up your 'responsiveness' and 'flexibility' muscles - which elements of an agreement are inflexible? Which can be 'modified' rapidly to 'meet the moment' for a partner's sudden need to pivot? Take some time to consider how deals may be structured differently in the future.
3. Examine and expand your assets to build resilience into future partnerships by with elements that can be activated outside of gameday.
4. Evaluate your sustainability efforts and/or platform to identify strengths and gaps in initiatives and performance - both environmental and social - and formalize a set of core values with which you hope to align with partners
5. As play returns even without fans, activate campaigns meant to build trust with fans regarding your commitment to their health and safety as well as begin to instill behaviors that will be needed in new normal settings.

This is the fourth instalment in this series. If you haven't already, check out the others, linked below.

[Part I: The Sustainable Sports Agenda: Opportunities for the Sports Industry to #BuildBackBetter](#)

[Part II: Environmental Strategies for Game Day Logistics](#)

[Part III: Opportunities in Concessions and the Back of House](#)



Sustainable Sport Research Collective is a collaboration among 4 established sustainability professionals exclusively focused on the sports industry. With strong knowledge of venue operations, environmental sustainability, social responsibility and fan experience and engagement, the group recognized the need for insights into fans' primary concerns, and latent trepidation, in returning to large public gathering spaces. As advisors and practitioners working regularly with sports league and team executives, we've established a robust survey method, including a novel virtual focus group, representative of the broad demographics of sports fans.

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