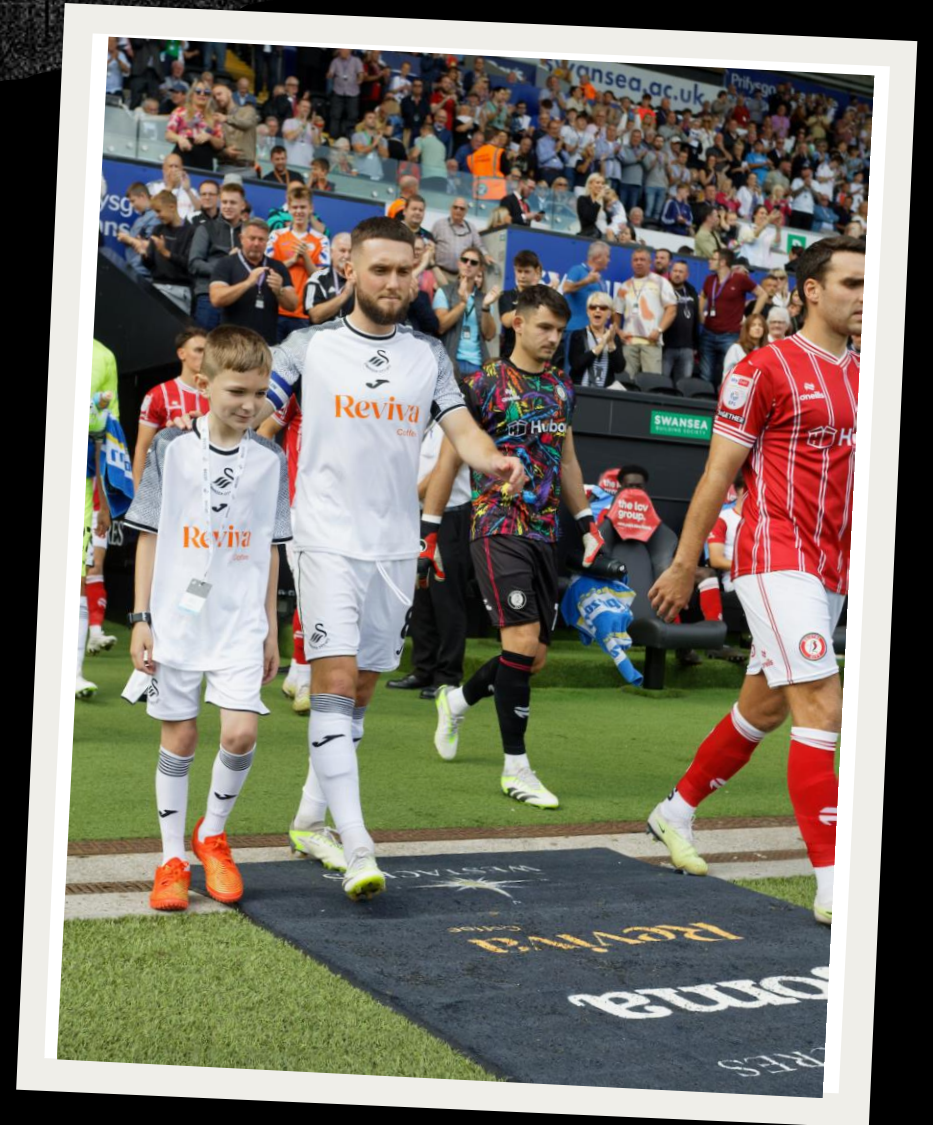


THE SWANSEA CITY MATCHDAY EXPERIENCE PROJECT



TRUST-LED REVIEW OF THE MATCHDAY EXPERIENCE
OCTOBER 2023 – JANUARY 2024





Context and purpose of this project

CONTEXT & PURPOSE

The Swansea City Supporters' Trust is partnering with the club to deliver a matchday experience project, focussed on capturing the views of a broad set of supporters to provide targeted, impactful improvements to the matchday experience.

The project will aim to bring together our collective expertise and resources, and capture views first-hand from supporters to inform the future strategy and investments by the club and the Trust.

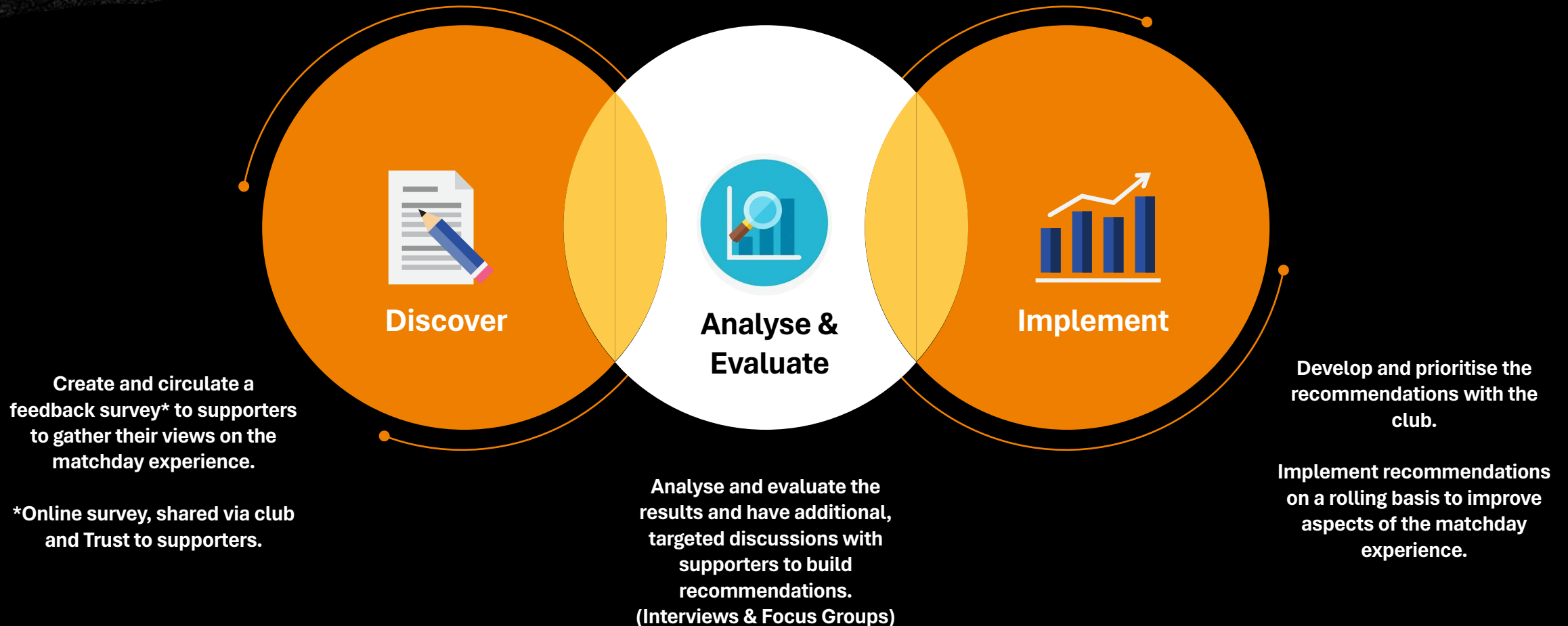
Since the return to stadiums in 2021/22, the matchday experience (particularly at the Swansea.com Stadium) has been notably different in some areas. This project will aim to understand what brings supporters to the stadium (or what keeps them away), and what the club needs to do to improve the experience for those who do attend home games.

OUR OBJECTIVES

1.	Deliver a supporter survey to capture the views of supporters on the current matchday experience
2.	Understand the different matchday journeys and experiences that supporters have when attending a home match
3.	Understand and capture the pain points of supporters, working to create a set of problem statements that can be addressed
4.	Develop a set of evidence-based recommendations for improvements to the matchday experience
5.	Create a business case (where required) for Board approval to make improvements to the matchday experience

Matchday Experience Survey | Approach

We have set out a three-stage approach to delivering this project, which is being led by the Supporters' Trust. We have developed and issued a digital survey to supporters and have evaluated the initial results. The next steps will be to host a series of focus groups to finalise recommendations.





SUMMARY ANALYSIS

Key aspects of a good matchday experience

Through this project, we have identified six core aspects of a good matchday experience for supporters that is a direct result of the feedback and recommendations that we have received.

Accessibility

The ease of getting to and from the stadium, including transport options

1

Food & Beverage

Quality, affordable catering options that meet the needs of all supporters

2

Build-up

An energising and connected pre-match build up that creates energy in the stadium

3



4

Off-field entertainment

Diverse entertainment that caters to different supporter demographics and interests

5

Connectivity

Ability to connect to internet before, during, and after the match

6

On-field performances

The quality of on-field performances that reflect our club's history and style of play
(out of scope for this project)

Summary Themes / Problem Statements

We've engaged with fans to create a view of the key challenges in the Matchday Experience and identified six core themes that capture the essence of the almost 1000 responses received.

Key Highlights



"We've lost our Welsh identity"

Supporters want the matchday experience to include more elements of our Welsh identity.



"The pre-match build up doesn't create energy"

The current build-up to games is not relevant and so supporters struggle to engage with it.



"Food & Beverage offer is poor and too expensive"

The quality and cost of F&B is not good enough and is driving people to outside providers.



"We want safe standing to help build the atmosphere"

There was significant support for safe standing in a section of the stadium.



"We can't connect inside the stadium"

The signal and Wifi within the stadium is poor, meaning supporters can't connect to speak with loved ones, or access apps/information.



"Access to and from the stadium is challenging"

The public transport options to and from the stadium are limited and therefore this leads most people to drive, which causes congestion and frustration.

The data behind this

- Only 10% of respondents scored the matchday experience as 5/5 – majority between 3 & 4
- 70% of respondents sometimes or regularly use outside food & beverage outlets (not stadium-run)
- 75% of respondents had a negative or neutral perception of the F&B offer within the stadium
- 41% of respondents don't buy any food or beverages within the stadium
- 44% of respondents haven't purchased anything from the club shop this season
- Over 60% of respondents regularly drive and park in or around the stadium
- 380+ individual recommendations on improving the atmosphere

Summary recommendations

During this review, we have captured and evaluated more than 600 recommendations from supporters suggesting ways to improve the matchday experience – these broadly fall into four distinct categories and themes.

01

Embed more of our Welsh culture and Swans history

Supporters would like to see greater recognition of both our Welsh heritage and culture, and a stronger reference to our history as a club.

This can be delivered through refreshing the pre-match build-up (including songs played, walkout music, video montages), as well as through greater celebration across the stadium (i.e., flags, artwork, posters)

02

Improve the food and beverage offerings to increase uptake

A joint review is required on the processes surrounding how you get food and drinks at the stadium (especially noting the two-queue system in place in the South and West Stands), and the quality of the food and beverage offer, which is currently far below what fans expect. This should be in line with a review of the costs of key items with a hope to bring these down.

03

Continue to improve off-field experience to draw in more supporters

The introduction of the Fan Zone this year was a welcome addition to the pre-match experience, however more work is required to expand that offering, as well as improving what happens inside the stadium before kick-off and during half-time.

Supporters would welcome more entertainment on the field as well as interviews, raffles, videos, and quizzes.

04

Improve Connectivity within the stadium

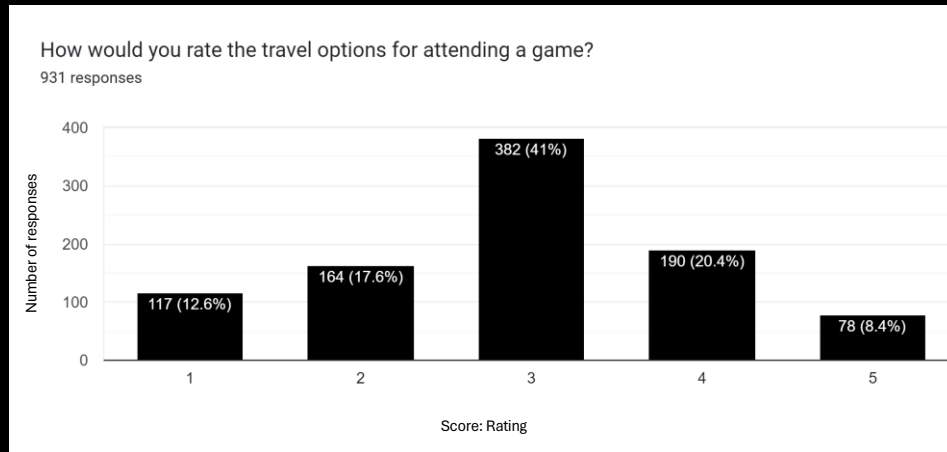
Respondents would like improved connectivity within the stadium to contact friends and family, access information, and use social media. The club has an opportunity to leverage this to increase opportunities to connect with supporters (such as through surveys & information sharing, as is seen in other organisations delivering public WiFi) as well as opportunities to increase messaging.



DETAILED ANALYSIS

Accessibility | Getting to and from the ground

Supporters use a range of transport options to get to the Swansea.com stadium on a matchday but feel that there is room for improvement to provide greater accessibility to and from matches.



Survey respondents: 930 as at 05/11/2023

Key analysis

- **62%** of respondents travel to and from matches by car, choosing to park either in paid-for parking (31%) or in free off-street parking (36.1%).
- Only **7%** use public transport to get to games, and this is cited as a challenge for many travelling in from the City Centre or Swansea Train Station.
- Bus travel during evening games is particularly challenging with routes and frequencies being reduced, and this has been made more difficult by games being extended beyond conventional amounts of 'added time'.
- Additional transport would reduce congestion and parking challenges for supporters, making it easier for them to get to and from the stadium.

Recommendations



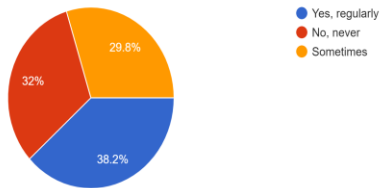
Better public transport Infrastructure

Explore opportunities around re-opening Landore Train Station or increase bus services from the City Centre on matchdays to provide greater public transport opportunities for supporters.

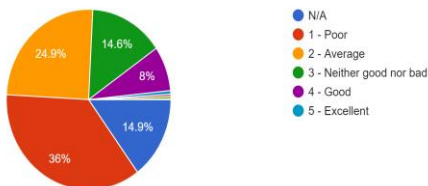
Food & Beverage | Purchase patterns

The cost and quality of the food and beverage offering inside the stadium is negatively perceived and is driving supporters to use outside outlets prior to entering the stadium or abstain from buying anything whilst in the stadium.

Before entering the stadium, do you typically use any external food and beverage facilities? (e.g., food truck, pubs, local outlets such as Greggs, Rossi's etc.)
934 responses



How would you rate the food and beverage offers within the stadium?
934 responses



Key analysis

- **75% of respondents** had a negative or neutral perception of the Food and Beverage offer within the stadium and many (68%) are opting to use outside outlets (e.g., food trucks, pubs, local outlets) to purchase items prior to matches.
- **A lower cost and better quality and diversity of offering** were identified as the primary drivers for this pattern amongst supporters.
- **40% of respondents** reported that they **do not** buy any food or beverage when inside the stadium.
- The recently introduced **self-service machines in the West and South stands** have created inefficiency and caused frustration amongst fans. The process is highlighted as a key reason that **some supporters choose not to purchase anything before or during the game.**
- The **removal of all cash payments in the stadium** is another key concern highlighted, as some fans (including children) do not have access to cards to be able to make payments. The club should look to introduce limited cash-payment stalls in the concourse to support those who cannot pay by card.

Recommendations



Improve the quality and variety of options

Review the current offering by Compass group and bring in additional selections, as well as focusing on quality improvement.



Reduce the cost of key items

Identify items where cost can be reduced (even as short-term, pre-match incentives) to entice more supporters into the stadium.

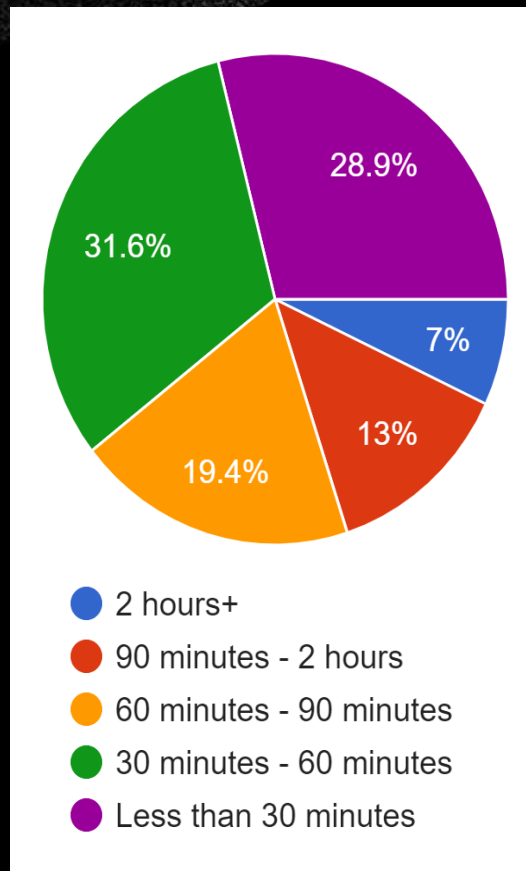


Fix the order and queue process

Review and update the process for self-service and queuing, moving to a model used by fast-food outlets (order & collect).

Pre-match | Getting into the stadium

The club is losing significant opportunities to engage with fans commercially and in building out the matchday experience through new initiatives as more than half do not arrive at the stadium until 60 minutes before kick-off.



Key analysis

- **60%** of respondents **do not** enter the stadium until less than 60 minutes before kick-off, which means that the club is not able to take advantage of potential food & beverage offers, or getting optimal attendance at pre-match initiatives such as the Fan Zone that was trialled earlier this season.
- This also **limits the footfall in the club shop** – only 22.9% of respondents reported buying something from the club shop on a matchday.
- We know anecdotally that supporters will stay at local pubs and food outlets until shortly before kick-off, especially those that show the early Premier League fixture (12.30 KO) on Saturday games.

Recommendations



Early-bird food and beverage offers

Entice supporters into the stadium earlier through more attractive food and beverage options and prices.



On-field pre-match entertainment

Create opportunities for on-field entertainment (e.g., male voice choirs) before the match



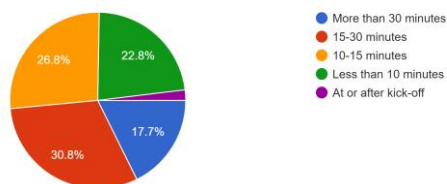
Premier League games on concourse

Show Premier League games (early KO) in the concourse in all stands to encourage supporters to enter earlier.

Pre-match | Building the atmosphere

Whilst most respondents believe the pre-match build-up is an important aspect of their matchday experience, there is a limited window in which the club can do something to rouse supporters given that a majority do not take their seats until less than 15 minutes before kick-off.

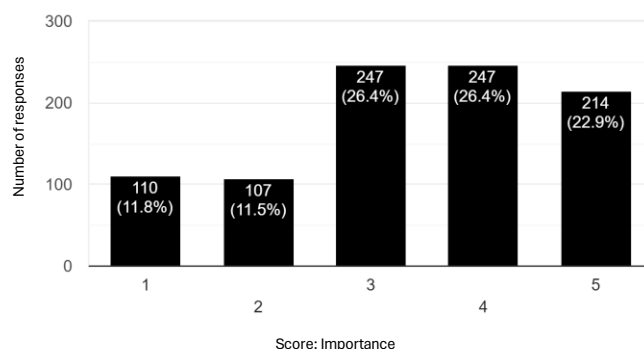
How long before kick-off would you typically look to take your seat?
934 responses



Key analysis

- **60%** of respondents **do not** take their seats more than 15 minutes before kick-off, meaning that the pre-match build up and creation of a rousing atmosphere is limited by a lower crowd.
- **23%** of respondents **take their seats less than 10 minutes before kick-off**, with 5% not taking their seats until or just after kick-off.
- **75%** of respondents believe the pre-match build up is an important part of the matchday experience, and we received more than **100 recommendations** on ways to improve this.
- **Music, lightshows (evening games), and reflecting more on our Welsh Culture and Heritage** were three core recommendations that were consistently brought forward by respondents. There is a need specifically to look at the walk-out music, and making it more relevant to the club, potentially revisiting songs that were used during our days at the Vetch Field.

How important is the pre-match build up to you?
934 responses



Recommendations



Improving the music we play pre-match

Playing Welsh & local music that fans can relate to and sing along with to build the atmosphere within the stadium (e.g., Hymns and Arias, White Riot)



Lighting displays for evening matches

Creating a light shadow (like Manchester City and other European clubs) for night games was identified as a key way to build atmosphere.

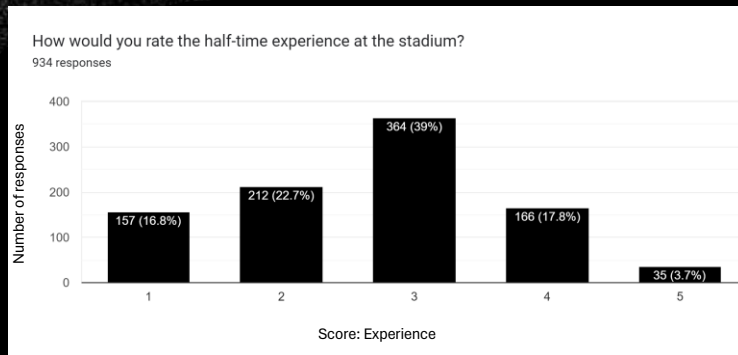


Introduce safe standing in the stadium

Turn a portion of the stadium into a standing section, which can help increase atmosphere (likely Northeast corner)

Half-time | Patterns & requests

Whilst most respondents believe the pre-match build-up is an important aspect of their matchday experience, there is a limited window in which the club can do something to rouse supporters given that a majority do not take their seats until less than 15 minutes before kick-off.



Key analysis

- **Over half (52.5%)** of respondents reported that they will typically remain in their seat for the entirety of the half-time interval, with **40%** opting to go onto the concourse and use the facilities.
- **Only 20%** of respondents reported that they purchase something from the food & beverage outlets during half-time.
- **Respondents** described the half-time show at the stadium as **“stale”, “boring”, or a “non-event”**
- **We received a high number of responses regarding the quality and availability of public Wifi or Phone Signal in the stadium, which respondents believed caused a negative effect on their experiences. Many supporters use the half-time interval to check in with friends and family, check the latest football scores, or use Social Media.**
- As the club now operates a digital matchday programme, a stronger signal, and better signposting, could increase the readership of the programme and therefore the commercial opportunities in the future from advertisements.

Recommendations



Refresh on-field entertainment

There is an opportunity to refresh the on-field entertainment, including through interviews with former players, or additional fan challenges.



Improve connectivity within the stadium

Improved connectivity within the stadium for supporters would improve their experience and there are opportunities to link that to club initiatives (e.g., digital quiz)

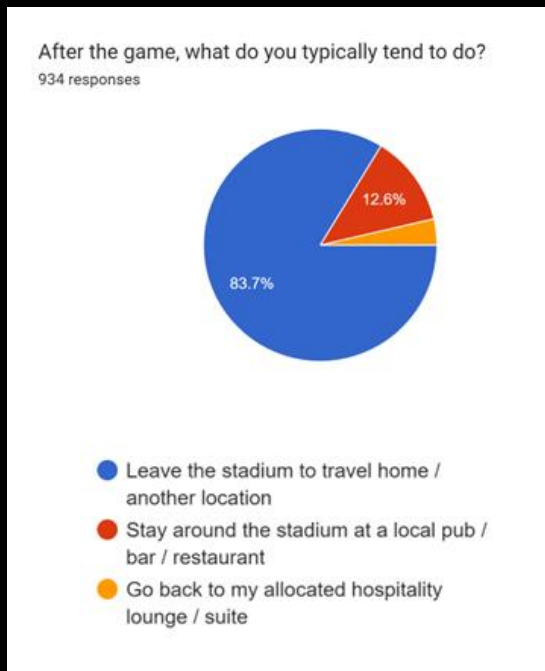


Introduce special half-time F&B offering

In addition to improving the ordering process, the club should explore opportunities to introduce special half-time offers for supporters.

Post-match | Patterns & requests

Whilst most respondents leave the stadium straight after the end of the game, some go to neighbouring food and beverage outlets that are not run by the club – given the traffic is usually at its peak straight after a game, there are opportunities to provide an offer for supporters within the stadium



Key analysis

- **Significant majority of supporters (84%)** leave the stadium at the end of the game, with 12% staying locally at one of the surrounding outlets.
- Traffic is typically restricted for at least 30 minutes post-match to allow for supporters to walk safely from the stadium, and therefore there is a significant build-up of traffic within the stadium and the surrounding area.
- The club could look to incentivise supporters to stay within the stadium after the match through a discounted hospitality or concourse food & beverage offer. Similarly, the opportunity to better utilise the Riverside Bar could be a useful outlet for the club and supporters to use post-match.
- For those that wish to leave, the club should look at working with the Local Council to evaluate what additional transport options are available for supporters (e.g., *increased, direct bus services into the City Centre post-match*) to ease congestion and reduce the environmental impact that significant numbers of cars is having.

Recommendations



Consider available F&B offers within stadium

Review the use of the Riverside Bar and other post-match options (e.g., lounges) to incentivize supporters to stay and increase commercial opportunities.



Improve Public Transport links to reduce congestion

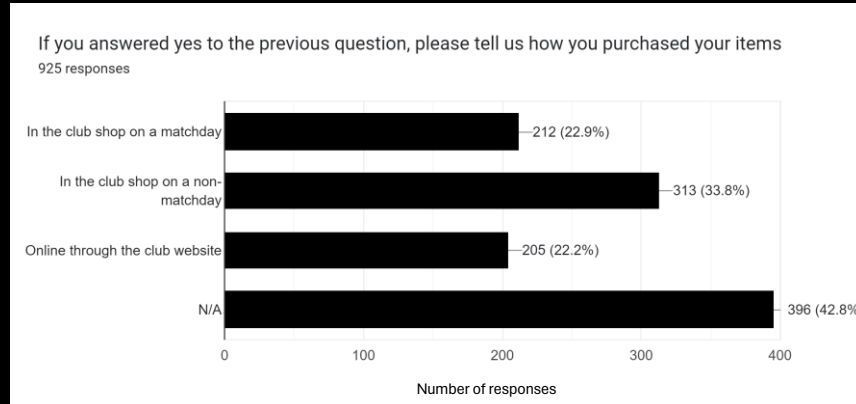
Consider opportunities to increase direct bus services for supporters after the game, to reduce congestion and improve the exit process from the surrounding area.

Spending at the Club shop

Over half of the respondents to our survey have purchased merchandise from the club shop this season, however only 22% of this was done on a matchday at the stadium, meaning that visiting the shop is not an essential part of supporters' experience

Key analysis

- **Note.** We asked supporters to select the methods by which they had purchased something, allowing them to select multiple options as relevant.
- **55%** of respondents had purchased something from the club shop this season. Of those who purchased:
- **Non-matchdays are most popular amongst supporters (33.8%)** when purchasing merchandise from the club shop.
- Online shop generated **22%** of sales reported by respondents this season
- Given the limited time some people spend at the stadium on a matchday, the club could look at opportunities to introduce merchandise stalls inside the stadium concourse to sell merchandise, as is commonplace in other stadiums around the world.



Recommendations



Consider outlets within the stadium

Review the opportunity to sell merchandise on the concourses within the stadium for supporters



Review opportunities to link spending across club

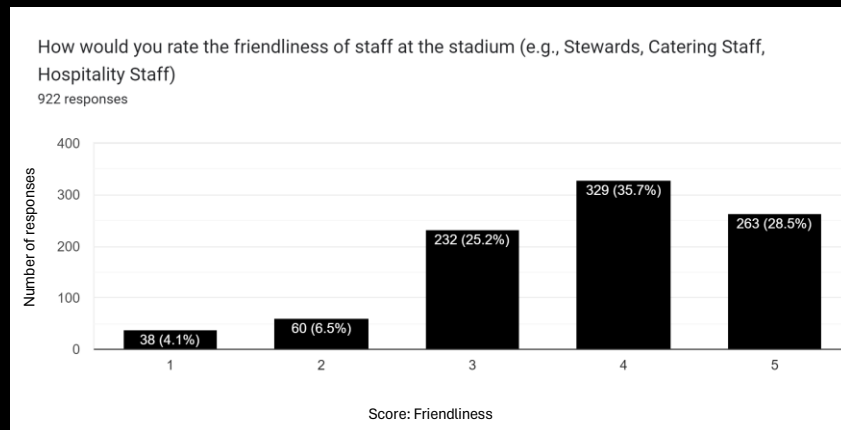
Create greater incentives for supporters to spend at the club on Food and Beverage by offering additional club shop discounts or offers.

Perception of Matchday Staff

The perception of matchday staff was generally positive, with a significant majority seeing them as friendly, effective, and helpful in delivering their role – people remain a key part of the matchday experience and improvement is needed in how catering services are delivered on concourses

Key analysis

- **Majority of supporters (65%)** feel positively about the matchday staff at the stadium.
- **Matchday Stewards** were singled out as being positive in the feedback, categorised as friendly, helpful, and effective in their roles – sometimes in challenging circumstances.
- The **catering staff** scored more poorly in the qualitative feedback, with a lack of knowledge and customer experience being the two key pieces of consistent feedback.
- We know that the catering staff are mostly third-party agency staff through Compass, however, there appears to be a lack of leadership amongst teams, which leads to ineffective delivery during peak periods.
- The model in place does not help this, where supporters are asked to queue twice to order their food – this is more inefficient than the old system whereby supporters queued once to order and receive their food.



Recommendations



Introduce KPIs for agency staff

Introduce a stronger performance measurement system for the catering staff, and work with Compass to systematically improve service.



Fix the order and queue process

Review and update the process for self-service and queuing, moving to a model used by fast-food outlets (order & collect).

About the respondents

Overview of the respondents who took part in our recent Matchday Experience Survey.

934

Total number of responses



81% of respondents were male



82% were current season ticket holders

11% were matchday ticket holders

7% were hospitality, concession, or Jack Army memberships

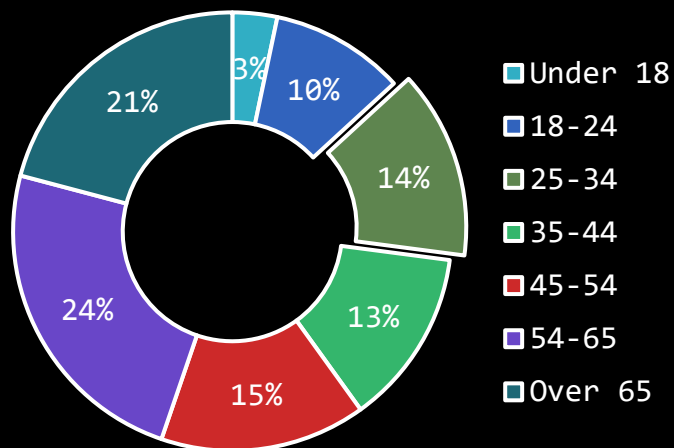
80% of respondents attended with a friend or family member

10% attended matches on their own



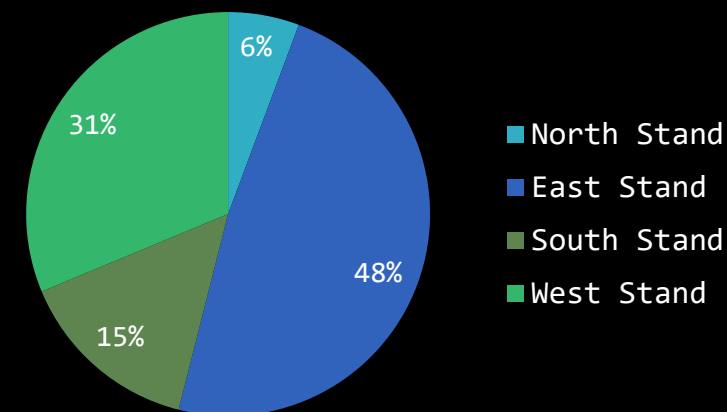
Age categories

Survey attracted a broad mix of age categories, with largest groups being 54-65 and 65+



Where they sit

Majority of respondents sat in East Stand, followed by West Stand.





RECOMMENDATIONS

Detailed recommendations

We have received more than 700 recommendations as part of this review, and we are continuing to work through them to categorise, de-duplicate, and evaluate the feasibility of them in practice. This is ongoing and will form part of further versions of this report. We have included key themes below.

Themes	Quick wins	Longer-term improvements
 Food and Beverage	 Introduce bi-lingual (English & Welsh) team announcements & substitutions  Update the walk-out music to reflect either our Welsh Heritage (Hymns and Arias) or something that the supporters know well (Take me to the Vetch Field, Daydream Believer etc).  Introduce early-bird food and beverage offer within the stadium	 Create a lighting display for evening matches to build atmosphere.  Review opportunity to re-open Landore station on matchdays or increase bus services  Update menu of food and beverage options available on concourse for supporters  Update stadium posters, flags, and memorabilia to build on heritage of Swansea City  Invest in better public Wifi offering for supporters to access at the stadium
 Transport		
 Pre-match build up	 Half-time special guest interviews on pitch  Update order process to mirror fast-food outlet process (e.g., order & collect based on ticket number)	
 Off-fieend entertainment		
 Connectivity	 Re-introduce the showing of early-kick off Premier League games in all concourses	
 Culture & History		



NEXT STEPS

Next steps

To progress this work, we will carry out a series of Trust-led and club-led initiatives to move through the remainder of the analysis, evaluation, and implementation of recommendations with the view to creating real improvements in the matchday experience in 2024.

Timeline

December
2023

January
2024

February 2024
onwards

What we plan to do

Presentation to Trust & Club
Boards for comment

Refinement of initial findings
and recommendations

Focus groups and interviews
with supporters

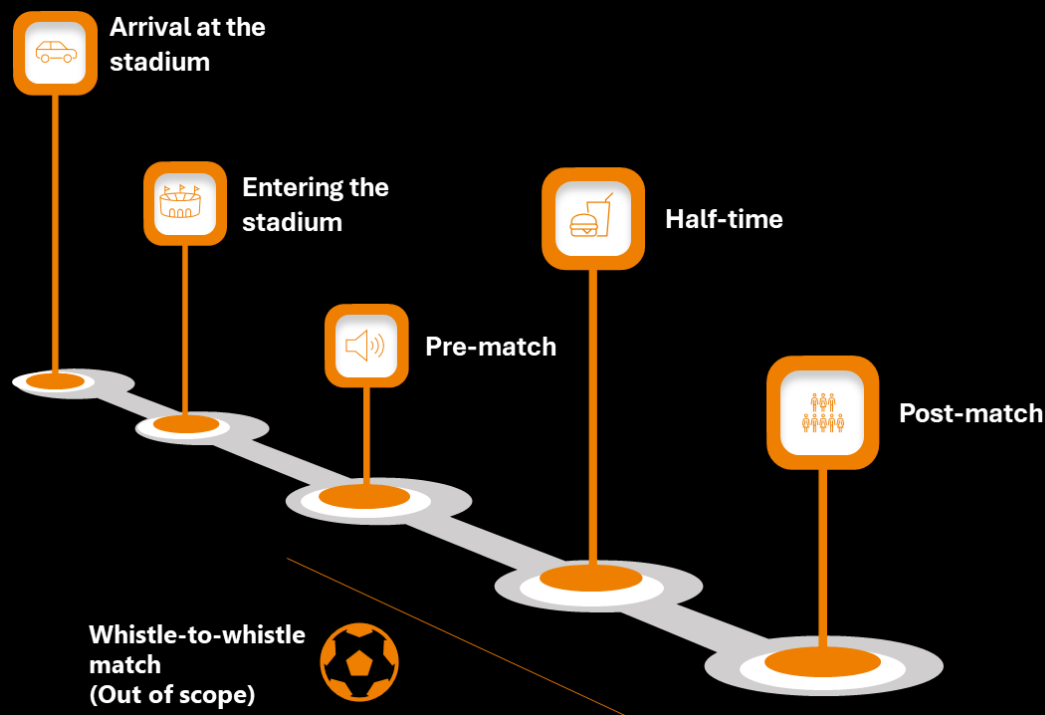
Implementing 'quick-win'
recommendations

Targeted surveys on other
aspects of experience (e.g.,
Ticketing)

Continued planning and
implementation of long-term
recommendations

Mapping the Supporter's Matchday Journey

We have established a Supporters' matchday journey as a framework to capture our findings as we believe that there are improvements that can be made at each step that will enable a better overall experience for supporters.



The supporter's matchday journey

We have identified five core steps in the matchday journey for a supporter, covering:

- How and when supporters **arrive to the stadium**
- When they **enter the stadium**
- Their **pre-match** build-up experience
- Their **half-time** experience
- How and when supporters **leave the stadium** after the match

In mapping out the end-to-end journey for a supporter, we were able to identify specific trends and recommendations that address the whole matchday experience rather than an individual part.

We recognise that performances and results will always be an essential part of the matchday experience, however these are outside the direct control of the Trust to provide recommendations on, but also on many of those who work to deliver the matchday experience and therefore this is out of scope for this project.