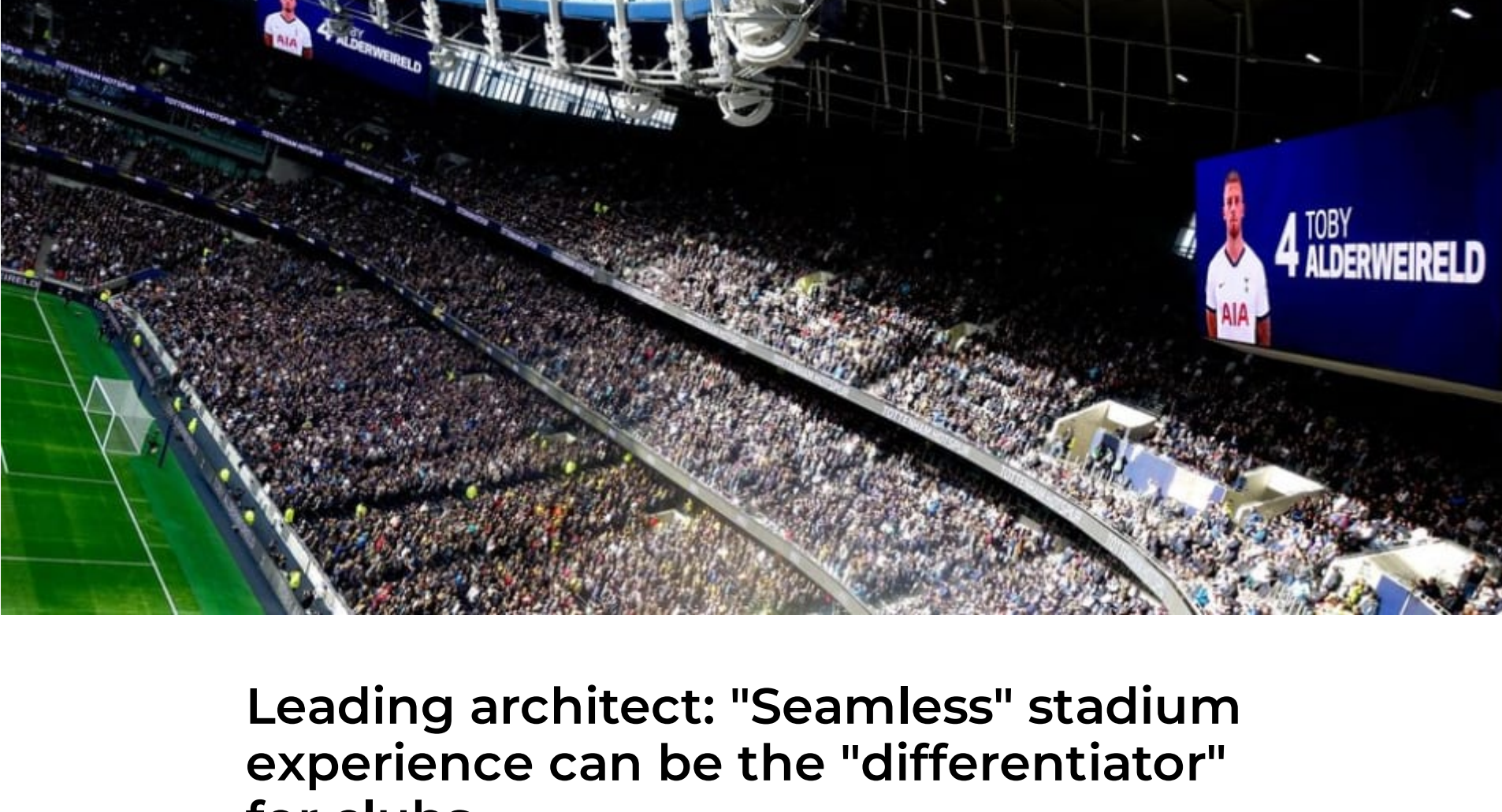


Good afternoon,

As you will notice we have made a few tweaks to this newsletter. From this week on you will be able to read one exclusive story in the newsletter every Friday, as well as having a sneak peak of our other articles, analysis and insights from the business of football.

PS: We are taking an Easter break next Friday so the next newsletter will arrive in your inbox on Friday 22nd April.

Happy Easter 🐣 - Mads



## Leading architect: "Seamless" stadium experience can be the "differentiator" for clubs

- Global architectural design firm Populous has designed 1,700 stadiums, including the Emirates Stadium, Tottenham Hotspur Stadium and Wembley.
- EMEA managing director Christopher Lee tells Off The Pitch clubs want to "elongate" the matchday experience and provide new experiences for fans at all levels – "the corporate box is somewhat dead".
- **Why it matters:** With matchday one of the three pillars of revenue, clubs are increasingly looking for ways to maximise stadium income.
- **The perspective:** Clubs compete with various entertainment options – not only other football clubs – to attract fans to matches. Focusing more closely on what fans want from the stadium experience can help boost matchday revenue.

By Robert Kidd, [contact@offthepitch.com](mailto:contact@offthepitch.com)

When Spurs chairman Daniel Levy was overseeing the design and construction of the £1 billion Tottenham Hotspur Stadium, he wasn't trying to compete with North London rivals Arsenal.

Instead, his focus was on how the new stadium could deliver a superior entertainment experience to others available locally, including outside sport.

That is according to Christopher Lee, EMEA managing director of global architectural design firm Populous, which designed Spurs' 62,303-capacity stadium, opened in 2019.

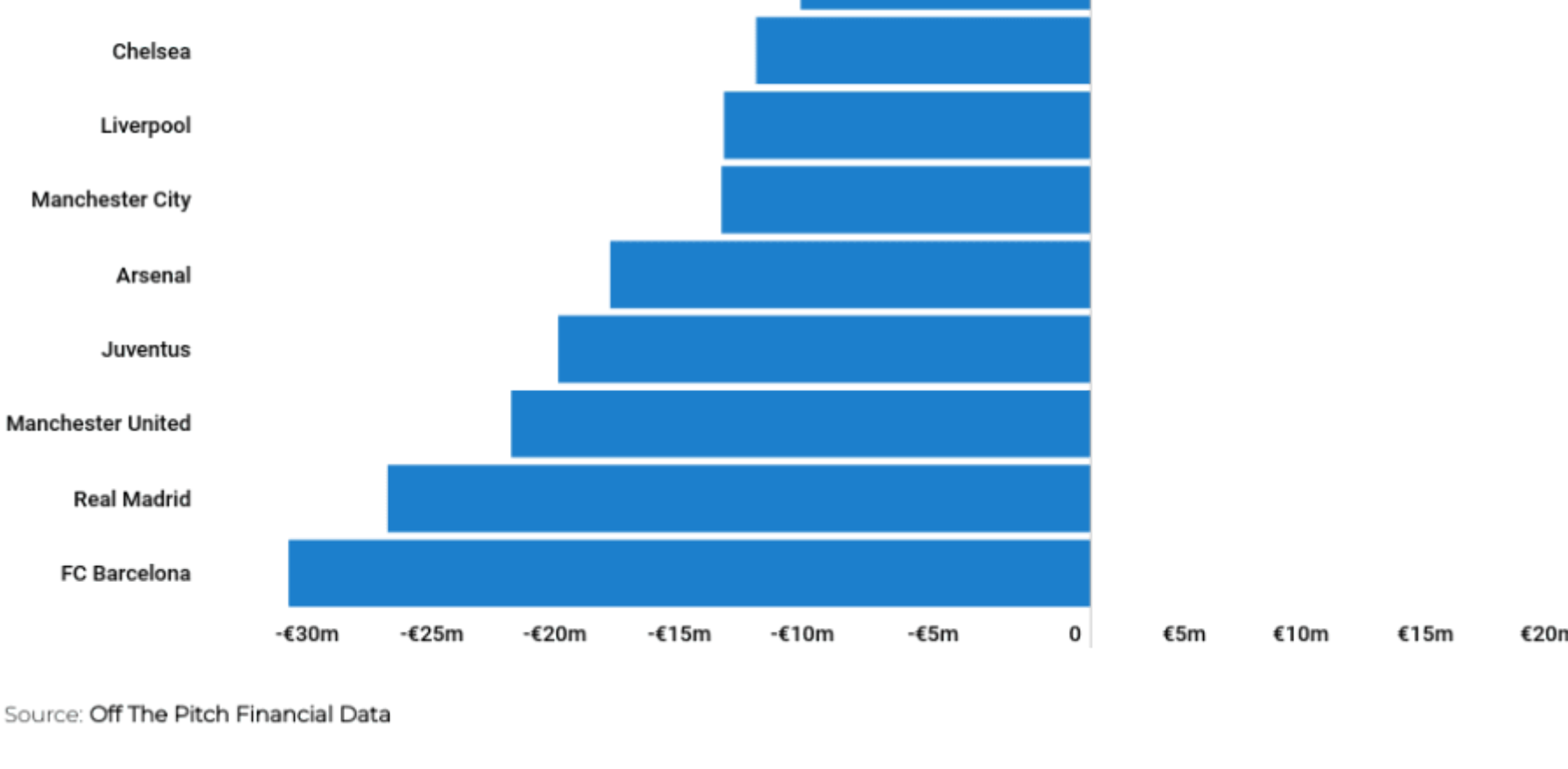
"I remember lots of conversations with Daniel (Levy) saying 'our competition isn't Arsenal in this development of the stadium. Our competition is the high street. If we can't deliver an experience that's as good as the local pubs or restaurants or bars, then we've failed in that sense,'" Lee tells Off The Pitch.

"Tottenham is a great testament to that. They're pulling something like £15, £16 spend per head (in the new stadium), whereas I think they were in the sub £3 per head at White Hart Lane.

"At the same time, the local economy has increased and grown, so it has not necessarily cannibalised the bars and restaurants. But we've got 60,000 fans three hours, sometimes four hours before the game, coming and being able to get in to have great food and great drink, and then stay two or three hours after the game.

"So it's about elongating that experience, in much the way our American cousins think of their sport events as a day event."

## Despite pandemic: New stadium saw Spurs increase matchday revenue by €15 million in 2019/20



Source: Off The Pitch Financial Data

OFF THE PITCH

Populous has been involved in the design and build of about 1,700 stadiums and venues across the world. In football, these include Arsenal's Emirates Stadium, Wembley Stadium and Lusail Stadium in Qatar, which will host the 2022 World Cup final. Populous has also designed the new stadium to be shared by AC Milan and Inter.

Lee has seen an evolution in what clubs demand from new stadia. He has also seen clubs realise the importance of maximising matchday revenue.

In the early days of Arsenal's planning to build the Emirates Stadium, which opened in 2006, Lee recalls some industry figures doubting the club would get a return on their investment.

"The project cost was, call it £200 million, and other club owners were saying 'that's ridiculous, (former Arsenal director) Danny Fiszman is going to send that club bankrupt,'" Lee says.

"(But) It became the differentiator, I think. At Highbury, Arsenal were taking matchday revenues around £40 millionish. They moved to Emirates and they jumped to about £90 million, I think that's crept up to about £110 million.

"So that £60 million, £70 million, £80 million, becomes a key differentiator for the club's economics and their sustainable future, and a differentiator in the world of Financial Fair Play."

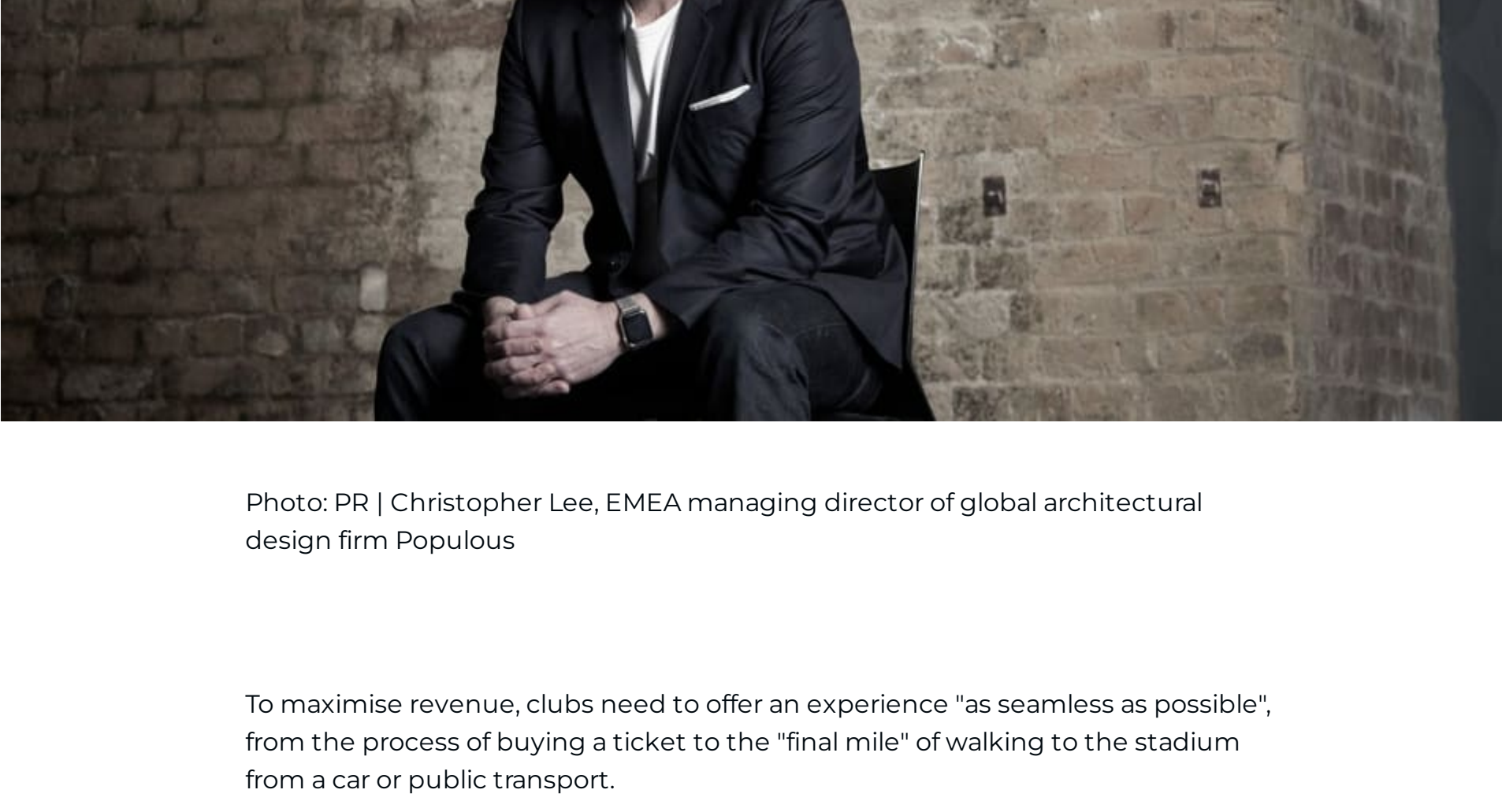


Photo: PR | Christopher Lee, EMEA managing director of global architectural design firm Populous

To maximise revenue, clubs need to offer an experience "as seamless as possible", from the process of buying a ticket to the "final mile" of walking to the stadium from a car or public transport.

"In English football I think we've treated our fans frankly pretty badly for a long time," Lee says.

"We thought of them as a captive audience ... You turn up at a gate and go through a turnstile that's pretty akin to a prison, you eat very bad food and drink very overpriced, warm beer. And hopefully watch some good football.

"We as consumers won't put up with that anymore."

As well as making the matchday experience inclusive for all kinds of fans, Lee says clubs must make the "hassle" of going to the stadium worth it, particularly with the option to watch on television at home.

"I think the television has spurred us to think we can't basically take our audience for granted," he says.

"Ultimately, we as humans absolutely crave the live experience. There is nothing that can replace that idea of being part of a community of 60,000 fans all wanting the same thing."

### Premium economy model

While football is not "a particularly corporate market", there has been a development of hospitality offerings for fans who value the finer things. Tottenham, for example, offer various experiences for matchdays, including The Tunnel Club, a glass-walled restaurant and bar area with a view of the players' tunnel.

"In many ways I think the corporate box is somewhat dead. We see a smaller number of much, much larger corporate boxes, whether they are corporates, or whether they are high-net-worth individuals," Lee says.

"We're trying to create clubs within clubs and spaces within spaces. You might end up sitting with 100 or 200 people that you may know."

He believes general admission fans are a "growth area" for clubs.

"We've started sort of mirroring the airline industry with the premium economy model. There are lots of fans who love being a fan ... but have a bit of money and wouldn't mind upgrading to a sports bar or something else but still having that experience," Lee says.

"Depending where you are and what club you are, it's trying to fit a business plan with a building plan."

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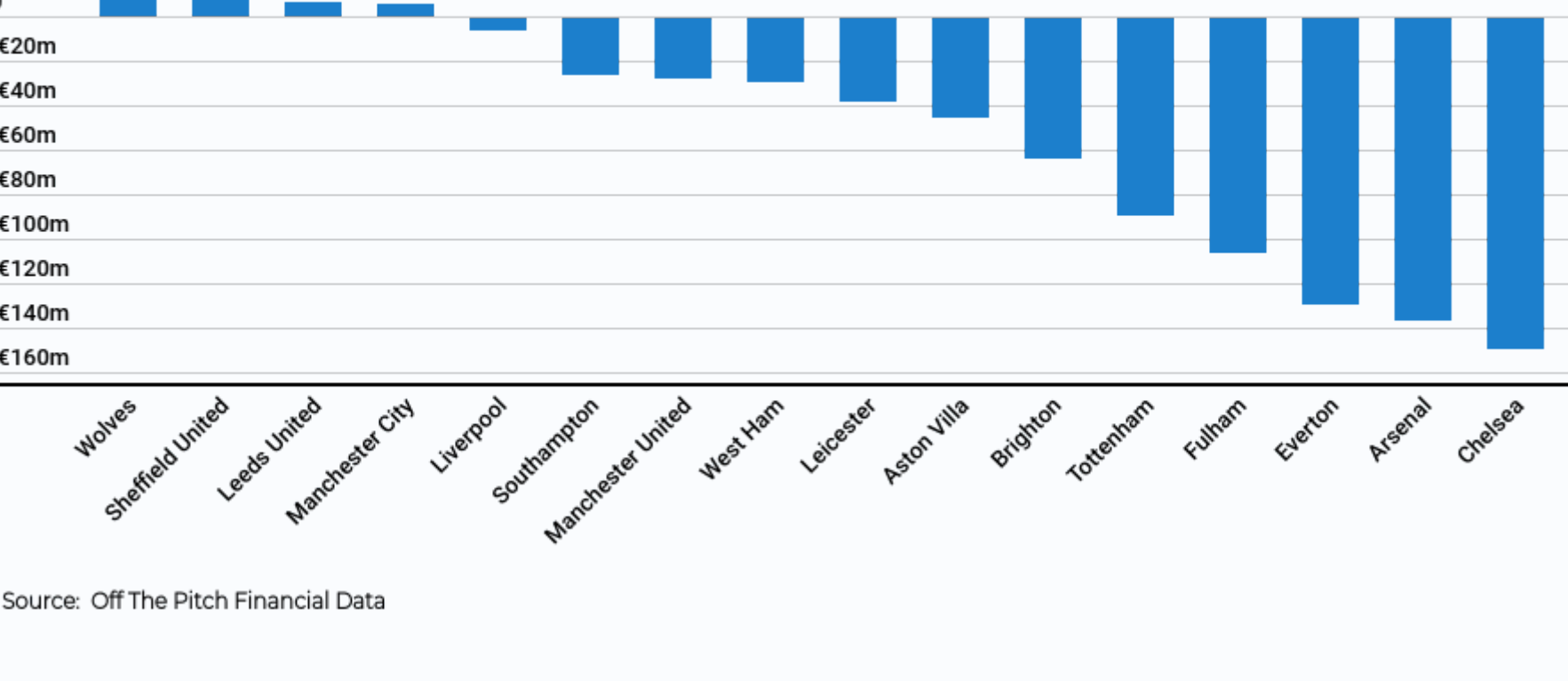
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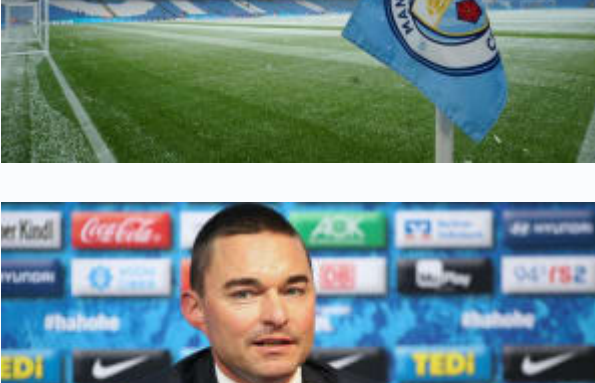
## Ranking of the Week

### Premier League: Profit/loss before tax excl. exceptional items



Source: Off The Pitch Financial Data

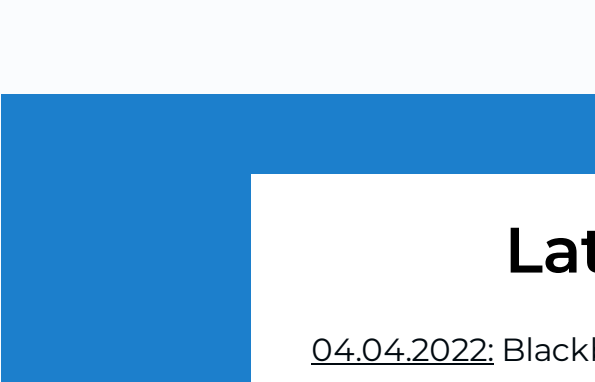
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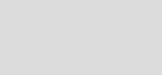
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## Latest upload financial data

- 04.04.2022: Blackburn Rovers 2020/21, Luton Town 2020/21
- 06.04.2022: Hibernian 2020/21, Bristol Rovers 2020/21, Rotherham 2020/21, Bundesliga Total
- 07.04.2022: Leeds United 2020/21, Preston North End 2020/21, Charlton 2020/21
- 08.04.2022: Stoke City 2020/21

Thanks for reading. See you Friday 22 april. Have a great weekend.

[support@offthepitch.com](mailto:support@offthepitch.com)



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