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Fan Preferences Analysis

On Behalf of Sport New Zealand Ihi Aotearoa

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Forward

What is the relationship between a fan and live sports venues? What does the individual fan want from their live sports venue experience?

When Carisbrook (Dunedin), the first paid spectator ground in New Zealand featuring a grandstand, opened in 1880, its role in society was clear: it was a place to gather, where the social experience was created by solely the sporting spectacle itself. The stadium existed to host the game; the game was the event. This proposition resonated with fans for much of New Zealand's history until the advent of the 'live sports-as-an-entertainment venue' proposition, first typified by the development of Sky Stadium (at the time Wellington Regional Stadium) in 1999, and most iconically, Eden Park's \$256m Rugby World Cup redevelopment in 2010. The first truly modern, and purpose-built stadium in New Zealand with its large bowl design and integrated hospitality offerings, Sky Stadium marked a turning point in fan preferences. Fans were no longer just coming to watch the game; they were expecting an enhanced entertainment experience. Stadiums since then have remained places of social gathering, but to meet rising entertainment expectations, have introduced ancillary offerings to supplement the entertainment derived from the on-field spectacle (e.g. pre/post-match activities, halftime entertainment, etc.)

While many leading live sports venues around the world still align with this proposition of being a venue centred around the sporting spectacle but supported by ancillary entertainment experiences, the most advanced live sports venues have evolved beyond this model. Live sports venues and the sporting spectacle within it are increasingly becoming one element of a much broader and diverse value proposition. First seen internationally through examples like LA Live, the Milwaukee Bucks Deer District, and the Chicago Cubs Wrigleyville, the evolution of the live sport precinct is gaining momentum: mixed-use environments that combine retail, dining, entertainment, and community facilities, operating year-round rather than just on game days. Even within a New Zealand context this approach is starting to emerge, with the new One NZ Stadium *Te Kaha* in Christchurch offering retail tenancy options and demonstrating what the live sporting venue of tomorrow could look like.

The success of venue innovations being showcased in overseas sports markets combined with emergent shifts in fan preferences have once again created a pivotal moment in live sports venue design. While New Zealand has adapted to the global trend of venues offering broader entertainment experiences, it must continue to adapt and be strategic about how it aligns with current fan expectations and proactively shape them going forward as well.

As these expectations continue to evolve, so too do the commercial opportunities sitting behind them. Historically, commercial partnerships in live sports venues have largely taken a narrow view, limited to considerations surrounding naming rights and signage. However, as live sports venues have transformed into entertainment venues, and now, increasingly, into broader precincts; partnership models have become more varied and integrated. Live sports venues today now host a diverse range of vendors, collaborate with technical partners (e.g. telcos to enhance connectivity, digital service providers to embed digital solutions) to deliver ancillary experiences, and even monetise fan insights. As more fans are being drawn in, live sports venues have matured into sophisticated businesses making them significantly more attractive for a wider array of commercial partners.

Figure 1: Live sports venue development timeline
(Illustrative)



LIVE SPORTS VENUES AS A GATHERING PLACE

The experience is just about the sporting spectacle itself, where fans are provided with an opportunity to come together



LIVE SPORTS VENUES AS AN ENTERTAINMENT VENUE

The experience is oriented around the sporting spectacle but is enhanced by ancillary ways to be entertained



LIVE SPORTS VENUES AS A DESTINATION

The live sports venue is about more than just sporting entertainment, it serves broader entertainment preferences as well as meeting ongoing social needs

While the concept of what a live sports venue means to fans has clearly evolved, it's important to recognise that not all venues are created equal. Fundamental shifts in global fan preferences and a natural desire from venue operators to constantly innovate have prompted responses from Large venues over time, offering insight into not only how newer waves of sports fans prefer to be engaged, but also tactically how their preferences can be proactively shaped. These developments present opportunities to differentiate, but that does not mean all live sports venues, let alone all venues in New Zealand should necessarily follow suit. Consequently, New Zealand must make deliberate and informed decisions about which live sports venues to upgrade and the nature of those enhancements.

To this end, this report aims to support that process by illuminating four key considerations:

- 1 Who are the different types of sports fans?
- 2 What shifts in fan preferences and live sports venue design are emerging globally?
- 3 How do fans in New Zealand prefer to consume live-sports?
- 4 What choices are available to New Zealand in designing a new facilities strategy?

While this report provides a clear view of these key considerations, ultimately decisions on the future of live sports venues should be first and foremost driven by a clearly defined and agreed upon vision for what New Zealand seeks to achieve as a broader sporting ecosystem. Any agreed upgrades will no doubt be unique to each live sports venue and the preferences of fan types - varied and diverse across sporting codes. This complex choice-making is a dynamic process when considering the nuances of ongoing tracking emergent of fan preferences, the disruption caused from innovations being made by live sports venue operators in overseas markets, and the ever-changing battleground between in-person and at-home digital live sports consumption.

Note: For simplicity this report classifies sporting facilities as Large (40k+ capacity), Medium (10k-40k capacity), and Small (sub 10k capacity). This report is intended to guide thinking rather than prescribe specific recommendations, any conclusions made throughout based on these Tiers should be considered as indicative.

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Types of Sports Fans

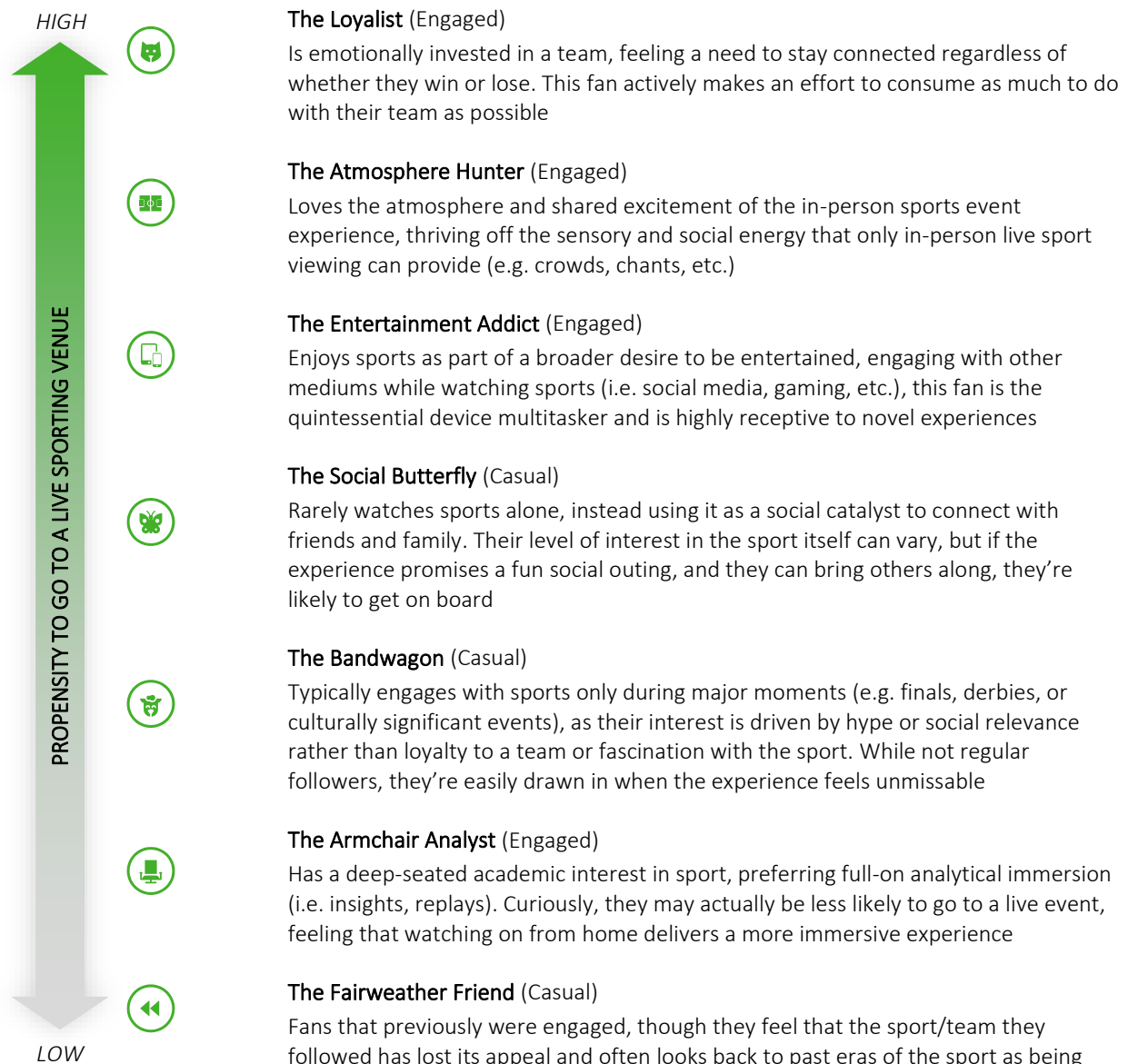
Who goes to a live sports venue?

Fan Archetypes

In any sporting economy, including New Zealand, there is no single view of who is a sports fan or what they want out of their live sports venue-going experience. The modern sports fan, whether engaged or a casual, comes in a variety of archetypes that transcend generations, geographies, and backgrounds. To this end, the depth of their fandom intensity and what they seek to get out of consuming live sporting experiences can differ significantly.

Figure 2: Sports fan archetypes

(Note: these archetypes are illustrative and generic in nature)



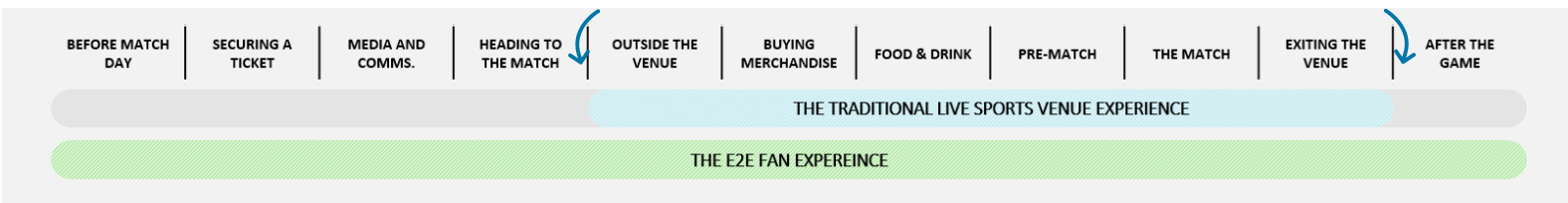
more in tune with their needs (e.g. prefers to watch documentaries rather than current events)

When considering the impact of fan behaviour on the broader facilities strategy, it's crucial to be clear on which types of fans these upgrades are specifically targeting, and to form a clear hypothesis about how they will improve the experience for those segments. These are strategic decisions that need to be informed and deliberate as they often involve making trade-off choices. For example, venue owners must consider how to strike the right balance between catering to loyal, regular attendees who value the atmosphere and routine of live games and appealing to more occasional visitors (e.g. such as tourists or one-off spectators) who may be drawn in by premium experiences and are often willing to pay more for them. In this case, both groups can contribute to a venue's long-term viability but in different ways. Understanding how to serve each effectively is key to the future of live sporting venue design.

Fan Journey

The journey that any fan undertakes when attending a live sports venue can be principally broken up into 11 key stages, 6 of which directly interface with any venue itself, and a further 5 indirectly influencing its appeal.

Figure 3: The fan journey model
(illustrative)



The live sports fan experience begins well before they step into any venue and continues after the final siren. It starts when the idea of wanting to attend is first incubated. Whether it's because one stumbled across a discounted ticket, was inspired by a highlight clip they watched on Youtube, or simply just had a friend message "keen to go to the match next week?"; the attraction to a live sports venue is not determined solely by the appeal of the upgrades made within its four walls. To truly meet fan expectations live sports venue owners and operators need to also consider how their venues can more seamlessly connect with the broader set of stages that fans engage with to create a more compelling end-to-end fan experience. While upgrades like better seating, enhanced food and beverage options, or AR/VR novel experiences can help attract fans to a live sports venue, they're only part of the equation. For example, making it easier for fans to buy tickets, access to convenient transportation options, or find nearby dining options to enjoy after the event can significantly strengthen the overall appeal of attending in-person.

Fandom in New Zealand

Figure 4: New Zealander willingness to watch live sporting events, by sporting code
(Fandom intensity coefficients, scale = 1-5¹)

Sporting code	Total Pop.	18-24 years	25-34 years	35-49 years	50-64 years	65-74 years	75+ years
Rugby Union	2.7	2.3	2.3	2.5	2.8	3.2	3.3
Rugby League	2.1	2.0	2.0	2.1	2.1	2.2	2.2
Football	1.9	1.9	1.7	1.9	1.9	2.1	2.2
Basketball	1.7	1.7	1.6	1.7	1.7	1.9	2.0
Netball	1.9	1.6	1.6	1.8	2.0	2.4	2.6
Hockey	1.5	1.4	1.3	1.4	1.5	1.7	1.9
Tennis	1.7	1.4	1.4	1.6	1.7	2.1	2.4
Cricket	2.1	1.6	1.8	2.1	2.2	2.6	2.9

Notes: (1) index coefficients reflect the weighted average of survey responses where participants indicated their level of fandom through a range of responses where 1 = 'does not follow', to, 5 = 'follows closely'.

Source: Sport NZ provided material 'Comprehensive National Data Table'

While more work is needed to fully understand how fandom manifests to the sports fan archetypes (refer to figure 2, information regarding the type of sporting content fans are more passionate about is a good indicator of the types of facilities that should be prioritised. Rugby continues to command the strongest overall following while Cricket is the second most followed sport in the country, with football and netball closely behind contesting third place.

Younger demographics are less willing to attend live sporting events than their older counterparts. This is particularly true when looking at cricket and tennis, standing out as the sports with the greatest variance in fandom intensity. In this regard, older generations demonstrate considerably higher fandom than younger ones, with the coefficients for 75+ year-olds (Cricket: 2.9, Tennis: 2.4) nearly double that of 18-24 year-olds (Cricket: 1.6, Tennis: 1.4). This sharp generational divide raises an interesting question: why are younger fans less willing to watch live sporting events? Are younger generations less interested in live sport? Or are the means to engage with live sport simply not accessible or attractive enough to these would-be fans in New Zealand?

Key Takeaway: Fan preferences are highly varied and nuanced when comparing equivalent archetypes across sporting codes, and even further within sporting codes (e.g. the contrast of preferences between 'loyalist' Test and T20 cricket fans). To inform any upgrade choices of live sports venues, it is essential that a deeper, data-driven understanding of who these fans are is reached. **A fan segmentation study that clearly defines the fan archetypes relevant to New Zealand, along with their desired end to end fan journeys should be considered for priority sports and sporting events.**

Global Shifts in Fan Experiences

What are the fundamental trends in live-sports consumption and how are live sporting venues being upgraded globally?

While New Zealand has a distinct and globally recognisable sporting identity deeply woven into its national identity, global shifts in technology and fan behaviour provide valuable signals for how live sporting venue infrastructure may need to evolve to remain relevant not only on an international stage but also to adequately meet the preferences of future generations. To this end, seven key trends have been identified as influencing what live sporting venues of tomorrow may look like.

1 | The Rise of the Smart Stadium: Recognising the commercial value of understanding fans on a deeper, more individualised level, as well as the operational efficiencies gained through data-driven insights, stadiums worldwide are undergoing bold digital transformations. These venues are evolving from monolithic concrete structures, to becoming fully integrated digital arenas. To achieve this, owners are increasingly investing (refer to figure 3) in embedding more data-capture technologies (e.g. IoT sensors) across every touchpoint of the fan journey, from ticketing, to security, concessions, merchandise, fan zones, and more. These systems are then designed to feed into centralised data platforms, supported by advanced analytics tools, to generate actionable insights that improve both fan targeting and operational decision-making (e.g. security management). At the same time, upgrades to network infrastructure such as enhanced Wi-Fi and mobile connectivity are being implemented to support increased handheld device usage within stadiums and unlock the monetisation opportunities. It is worth noting the dollar spend on smart stadium solutions and services are expected to increase by a 17.8% CAGR between 2024 and 2033, increasing from \$14.5bn to \$63.3bn NZD.

Source: Custom Market Insights 'Global Smart Stadium Market Size 2024'

Case Study: So-Fi Stadium (Los Angeles)

SoFi Stadium stands out as one of the most technologically advanced sports venues globally, driven by its use of digital twins and AI analytics. As the first stadium to implement digital twin technology, it can simulate and manage live operations in real time, from monitoring security crowd flow to optimally configuring event delivery and reducing downtime of services. Additionally, through its GeniusIQ platform, SoFi analyses player data to instantaneously generate augmented highlight replays for fans (e.g. player tracking visualisations) whilst dynamically embedding sponsor branding (e.g. Verizon) into these replays to create novel and privileged marketing opportunities for sponsors

Case Study: Rise of 5G mmWave in Australia

Since 2020, three Large stadiums in Australia have become 5G mmWave-enabled (MCG, Marvel, and Accor). A network upgrade designed to build upon existing 5G infrastructure to provide fans with even more robust and reliable connectivity, these stadiums made these upgrades to meet the growing data demand associated with hand-held device usage during events (e.g. posting photos/videos).

Key Takeaway: For Large and Medium live sporting venues, **the ability to meaningfully make use of data is no longer a competitive advantage, it is a foundational requirement.** Whether it's discerning fan behaviours, enhancing connectivity, improving stadium operations (e.g. security) or delivering more immersive novel experiences to the fan, embedded digital capabilities are fast becoming standard and stadiums that fail to keep pace may risk falling behind others

Focus of Upgrades (Indicative):

Centralised Data Mgmt. Systems

Embedded Data Capture (e.g. IoT)

Advanced Data Analytics

Telco Network Infrastructure

2 | Demand for Hyper-Personalisation: As the cost of live sports attendance rises and economic conditions tighten, fans, especially younger ones are becoming more discerning of experiences that can demonstrate value for money. Subsequently, the ability of live sporting venue operators to deliver hyper-personalised experiences is emerging as a key differentiator for driving younger sports fans to them, who view the exchange of personal data for curated content as a fair and reasonable transaction.

Case Study: Tottenham Hotspur Stadium

Tottenham Hotspur Stadium offers personalised fan experiences through its team app, collecting data from the stadium's 1,641 Wi-Fi 6 access points and 700 Bluetooth beacons to inform and refine understandings of individual fan behaviours. By combining this compiled knowledge about its fans with external data sources, the club delivers targeted offers during matchdays. For example, fans receive promotions for Spurs hoodies on rainy days and polos or kits when it's sunny. Further, fans can order food and drinks directly to their seats via the app, reducing wait times. Further, through a partnership with Socios.com, fans can access Fan Tokens which they can redeem to earn VIP tickets, big screen messages, and virtual meet-and-greets. Location-based notifications provide tailored travel advice, and interactive wayfinding.

Key Takeaway: Effectively using interaction data within live sporting venues **to create rich personas of individual fans to personalise offers, such as promotions or discounts, can significantly enhance fan engagement, especially among younger audiences** who are more receptive to targeted content. This presents strong monetisation opportunities for venue operators and their partners through upselling and tailored experiences. However, overuse or reliance on generic targeting risks alienating fans. If operators fail to truly understand individual preferences, attempts at personalisation may come across as intrusive or irrelevant, and may undermine the broader allure of the venue experience.

Focus of Upgrades (Indicative):

Centralised Data Mgmt. Systems

Embedded Data Capture (e.g. IoT)

Advanced Data Analytics

3 | Diversifying Appeal of the Live Sporting Venue Experience: No longer can a live sporting venue owner simply rely on team loyalty or sports fanaticism to drive attendance. For younger sports fans, the appeal of going to a live sporting venue is now much more than just the sense of belonging they feel when sitting with their fanbase. Unlike boomers who grew up in a pre-internet era and often formed deep, lifelong bonds with their teams, Gen Z are less driven by team loyalty. Their motivation for attending any live sports event is becoming increasingly tied to their desire to make a post on social media about attending the event, the potential to win something for free through a novel experience, and their affinity to individual athletes.

Figure 6: Favourite element of a live sport event, other than the event itself

(% of times the element was selected as a top 3 preference)

Favourite element	Gen Z	Millennials	Gen X	Boomers	Matures
Socialisation – spending time with friends or family you attended the event with	68%	71%	70%	71%	73%
Possibility of seeing something significant or historic happen live	45%	49%	53%	58%	64%
Giveaways, promotions, or activities offered by brands sponsoring events	35%	33%	24%	25%	16%
Stadium / venue experience	54%	53%	59%	61%	63%
Social media engagement you received from posting about your attendance	31%	32%	24%	10%	2%
Interacting with individuals involved in the event e.g. athletes or performers	32%	26%	22%	22%	20%
A sense of belonging and being part of a community / fanbase	35%	36%	49%	53%	61%

Source: 'Media and Entertainment Consumer Insights' survey 2025, Deloitte Australia

Case Study: LA Clippers Interactive Fan Games and Loyalty Rewards (Intuit Dome)

At the Intuit Dome, each seat is equipped with a four-button controller integrated into the armrest, inspired by Microsoft’s Xbox design. Fans use these buttons to live vote during games on questions or contests displayed on the massive scoreboard, actively participating in in-game entertainment and interactive experiences. This system not only engages fans in real time but also collects data on their responses and reaction times, enhancing the overall atmosphere and enabling personalised rewards through the Clippers’ loyalty program.

Key Takeaway: To attract and retain younger fans, live sporting venues must move beyond a game-only mindset. Ancillary experiences should not be treated as optional novelties offered occasionally, but as core components of a venue’s live-event strategy that warrant ongoing investment. Successfully integrating core-match-viewing and ancillary experience propositions will be a key driver of attendance for younger fans. Venue owners must therefore deeply understand their fan demographics and make intentional choices about who they want to attract to their venues and why.

Focus of Upgrades (Indicative):

- Athlete Interaction Experiences
- Fan Zones
- Player-Tracking Cameras
- In-Seat Instant Replays

4 | Home as the New Front Row: Although there is both a substitutionary and complementary relationship between digital (e.g. at-home broadcast and streaming platforms) and in-person consumption models; at-home models now offer more accessible and convenient ways to consume live sports than ever before. Further, advancements in home entertainment innovation have been helping to close the gap in the quality of the live sports experience that can be delivered in a physical venue versus at home (e.g. ultra-high-definition TVs, embedded analytics within streaming platforms, etc.). Add to this the rising costs associated with attending games in person, and it becomes clear that fans require more compelling reasons to want to leave the comfort and convenience of their homes.

Figure 7: Percentage of New Zealand population who watched a live sport event
(in a given 7-day period)

Channel	Total	18-24 years	25-34 years	35-49 years	50-64 years	65-74 years	75+ years
Attended a professional sports event	16%	24%	19%	18%	13%	10%	8%
Watched professional sports live on television or another device	63%	63%	56%	60%	63%	73%	80%

Source: Sport NZ provided material 'Comprehensive National Data Table'

Case Study: Formula 1 TV Premium

In 2025 F1 TV launched its premium subscription tier, offering fans one of the most sophisticated and immersive streaming platforms in sports to date. At ~1/3 the price of an average single F1 ticket (~\$500 USD) fans, for only \$130 (USD), not only get access to 4K UHD streaming of every race, qualifier, and practice session live or on demand, but also access to Multiview features, grid interviews, driver-on-board cameras, team radio, exclusive behind the scenes content, as well as F2 and F3.

Key Takeaway: *Whether the relationship between digital and live sports viewing in New Zealand evolves to be more complementary than substitutionary in years to come depends on how successfully the venue experience remains distinct from what broadcast and streaming platforms can offer. As broadcasters and streaming platform providers continue to innovate, offering more immersive features that bring fans closer to the action from their living rooms (e.g. exclusive angles, athlete interviews, real-time stats, etc), venues operators will continue to face increasing pressure to define, effectively communicate to fans, and deliver experiences that are able to amplify the unique value proposition of being there in person.*

Focus of Upgrades (Indicative):

AR/VR Activations (e.g. pre-match tunnel experience)

Fan Zones

Meet-the-Player Events

Premium Dining Experiences

In-Seat Ordering and Delivery

Limited Edition Merchandise

5 | Sustainability Embedded within Live Sports Venues: Driven by growing environmental awareness, especially among younger fans, sustainability is becoming a core focus in how venues are built and operated. From renewable energy and low-impact materials to waste reduction and greener transport options, live sports venues are adopting sustainable practices as a means to align with growing eco-discerning sports fans segments. In addition to rising fan expectations, the majority of international bodies (e.g. IOC, FIFA, FIBA) have clear and distinct requirements that host nations and facilities must comply with, meaning the scrutiny around securing these events will only continue to rise into the future.

Case Study: Nef Stadium (Turkish Football)

Nef Stadium in Istanbul, home to Galatasaray SK, broke the Guinness World Record in 2022 for the highest solar power output from a sports facility, thanks to a 4.2MW rooftop solar installation spanning 40,000 square meters. The system includes over 10,000 panels and generates enough clean energy to power 2,000 homes and offset 3,250 tons of CO₂ annually.

Case Study: Allianz Arena Recyclable Cups

FC Bayern München’s Allianz Arena uses a reusable cup system to drastically reduce plastic waste during matchdays. Instead of disposable cups, fans receive reusable cups for a €2 deposit, encouraging returns at over 160 collection points inside and outside the stadium. Returned cups are then rebated to fans, cleaned nearby to minimise transport emissions, and reused for future events. This system saves nearly two million single-use cups and prevents around 20 tons of plastic waste each season.

Key Takeaway: While sustainable venue operations may not be the primary driver of fan attendance, they are increasingly influential in shaping fan behaviour around ancillary services such as food, beverage, and merchandise. Failure to prioritise sustainability may hinder New Zealand’s ability to execute on long-term strategic objectives (e.g. eligibility to host major international events). To this end, live sports venues operators should **consider sustainability not only as a moral imperative but as a commercial enabler and differentiator that also drives operational savings over the life of the asset**, embedding environmental considerations into upgrade plans and supply chain selection processes.

Focus of Upgrades (Indicative):

- Renewable Energy Capture and Storage
- Waste Reduction Initiatives

6 | Multi-Screen Viewing has Become Status Quo: The way sport is consumed has shifted toward a more digitally intertwined experience. For younger generations, raised as digital natives, their exposure to digital platforms and short-form content at an early age has normalised fragmented yet integrated media consumption behaviours. To this end, watching sport for them is no longer a passive act as it was for older generations, but rather it’s become a multi-screen experience. Regardless of whether they’re in the stands, at the local, or on the couch, the attention of younger sports fans is shared, split between the action on the field and their screens. Whether it’s to post on social media, watch replays, engage with interactive content, the increased use of screens during live-sports consumption is not a distraction that needs to be mitigated but rather a fundamental shift in how younger sports fans prefer to engage with live events.

Figure 8: Percentage of sports fans who do the following activities while watching live sporting events (2023)

Activity type	Gen Z	Millennials	Gen X	Boomers
Look up player or team statistics	51%	49%	49%	34%
Use social media to read comments and opinions from others	51%	46%	39%	18%
Use social media or a messaging service to interact with others	44%	47%	35%	19%
Watch another game on a separate device	21%	30%	23%	15%
Bet on a website or mobile app (21+ years)	22%	24%	16%	6%
Play fantasy sports	17%	25%	18%	4%
Purchase sports merchandise or memorabilia	17%	20%	14%	5%
Play a game related to the event	22%	18%	7%	2%

Source: 'Sport Fan Insights Survey' 2023, Deloitte US

Key Takeaway: *Upgrading live sports venues to support multi-media engagement will be key to making the venue-going experience compelling for younger, digitally native fans. However, these **upgrades must enhance rather than detract from the core spectacle on the field**. For example, highlights on Jumbotrons or strategically placed screens in concession areas can ensure fans stay connected to the game without compromising atmosphere. Embracing ancillary digital experiences for younger fans to engage with, whether it's in the form of handheld devices, embedded displays, or otherwise will bring about increased monetisation opportunities through targeted ads, sponsored replays, and/or exclusive content.*

Focus of Upgrades (Indicative):

Big Screen Displays (e.g. Jumbotrons)

In-Seat Entertainment Systems

Wifi / 5G Connectivity

Smart Kiosks

7 | Evolution of Live Sports Venues into Precincts: Live sports venues are evolving from single-purpose sports venues into dynamic social precincts. Decisions to attend a game, particularly for casual fans and younger generations, is no longer just driven by a desire to watch a match, but also by the broader social experience that surrounds it. From ease of transport to and from the event, pre- and post-game dining, to retail and entertainment, venues owners are investing in infrastructure focused on increasing fan dwell time and their propensity to spend, in a way that modern live sports venues today can now offer a full-day or night-out proposition.

At the same time, these venues are also investing in infrastructure upgrades that help expand the functional capabilities and accessibility of venues to better host concerts, festivals, and community events, premised on driving year-round utilisation and enhancing their commercial appeal to non-sport partners. Importantly, the evolution of live sports venues into precincts doesn't necessarily require expanding their physical footprint. In denser urban areas where space is limited, this shift is often achieved by repurposing existing venues infrastructure, sometimes even downsizing seating capacity to create space for new social, commercial, and community offerings. While becoming a precinct may necessitate expanding the physical footprint of a live sports venue this evolution is primarily focused on making them more versatile and multi-purposeful.

Case Study: Marvel Stadium

Completed in 2024, Melbourne's Marvel Stadium underwent a \$225 million redevelopment, sponsored by the Victorian government, premised on transforming the venue from a traditional matchday-focused stadium into a vibrant, 7-day-per-week precinct that extends beyond just live sports. The project opens up the stadium to the community through the creation of its 'Stadium Square', an all-weather public space with retail shops, bars, restaurants, and event facilities designed to support social gatherings, markets, and other casual visits. Enhanced hospitality areas like the Skyline and Horizon rooms offer premium experiences with panoramic city views. The redevelopment also improves public transport access and connectivity between the Docklands and the Melbourne CBD, activating the precinct as a dynamic social hub that supports diverse events and local businesses, redefining the stadium as a multi-use urban destination.

Key Takeaway: *Transforming live sports venues into broader social precincts not only drives more fans into watching live-sports matches but also serves to diversify revenue streams for live sports venue owners, improving financial self-sufficiency and providing more predictable returns. Successful venue regeneration however hinges on more than just building the infrastructure or partnering to deliver ancillary experiences (e.g. dining, retail, and other entertainment options). Venue operators must also thoughtfully package and promote these offerings as part of integrated fan propositions. Without clear connection to and orientation around the matchday experience, and effective communication to fans, any upgrades made to live sports venues may not generate returns as expected.*

Focus of Upgrades (Indicative):

Hospitality Zones (e.g. dining, breweries, etc.)

Retractable Seating

Boutique Stores / Pop-Up Partner Activations

Public Transport Integration

The State of Live Sports Consumption in New Zealand

What options are available to New Zealanders to consume live-sports? What channels do they prefer?

Fans today primarily have two core avenues when it comes to choosing how they'd prefer to consume full-length live sports, attending games in person at sporting facilities or watching along through digital means via broadcast television and streaming services. Each mode of engagement offers distinct experiences, benefits, and challenges to developing a compelling live-sports experience for fans.

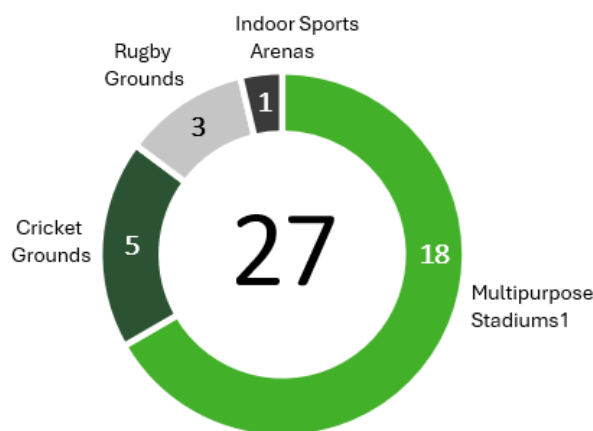
Network of Live Sport Venues Across New Zealand

As of May 2025, there are 27 live sporting venues across New Zealand with a seating capacity exceeding 10,000¹. In addition, a further 33 other venues have also been identified as hosting professional sporting events and feature dedicated seating areas.

Large	Medium	Small
40k+ capacity	10k - 40k capacity	Under 10k capacity
1	26	33

Notes: (1) Types of live sports venues considered include multipurpose stadiums, cricket grounds, rugby grounds, indoor sports arenas, football grounds, multi-sport complexes, tennis centres, velodromes, outdoor field hockey venues, and ice sports arenas. This analysis does not consider speedways or horse racing tracks.

Figure 9: Share of Large and Medium live sporting venues by venue type
(# of live sports venues)



Notes: (1) Considers the One NZ Stadium project, a multipurpose stadium (~30k capacity) cited to open in 2026
Source: Sport NZ provided material 'Current venues – roughly Medium and Large', Austadiums, Deloitte analysis

Figure 10: Counts of Large and Medium live sports venues across NZ by location, as of May 2025
 (# of live sports venues)



Notes: (1) Considers the One NZ Stadium project, a multipurpose stadium (~30k capacity) cited to open in 2026
 Source: Sport NZ provided material 'Current venues – roughly Medium and Large', Austadiums, Deloitte analysis

Figure 11: List of Large and Medium sporting facilities across NZ, as of May 2025, including facility type and capacity

(Capacity considers only permanent seating)

Stadium Name	Stadium Type	Location	Capacity
Eden Park	Multipurpose Stadium	Auckland	50,000
Sky Stadium	Multipurpose Stadium	Wellington	34,500
Forsyth Barr Stadium	Multipurpose Stadium	Dunedin	30,748
One NZ Stadium ¹	Multipurpose Stadium	Christchurch	30,000
Western Springs Stadium	Multipurpose Stadium	Auckland	30,000
FMG Stadium Waikato	Multipurpose Stadium	Hamilton	25,000
Go Media Stadium	Multipurpose Stadium	Auckland	25,000
North Harbour Stadium	Multipurpose Stadium	Auckland	25,000
Stadium Taranaki	Multipurpose Stadium	New Plymouth	25,000
Owen Delany Park	Multipurpose Stadium	Taupo	20,000
Rotorua International Stadium	Multipurpose Stadium	Rotorua	20,000
Mercury Baypark Stadium	Multipurpose Stadium	Tauranga	19,800
McLean Park	Multipurpose Stadium	Napier	19,700
Apollo Projects Stadium	Multipurpose Stadium	Christchurch	18,600
Semenoff Stadium	Multipurpose Stadium	Whangarei	18,500
Central Energy Trust Arena	Multipurpose Stadium	Palmerston North	18,000
Hagley Oval	Cricket Ground	Christchurch	18,000
Rugby Park Stadium	Multipurpose Stadium	Invercargill	18,000
Trafalgar Park	Rugby Ground	Nelson	18,000
Lansdown Park	Rugby Ground	Blenheim	15,000
Spark Arena	Indoor Sports Arena	Auckland	13,000
Alpine Energy Stadium	Multipurpose Stadium	Timaru	12,500
Bay Oval	Cricket Ground	Tauranga	12,000
Navigation Homes Stadium	Rugby Ground	Pukekohe	12,000
Basin Reserve	Cricket Ground	Wellington	11,600
John Davies Oval ²	Cricket Ground	Queenstown	11,200
Seddon Park	Cricket Ground	Hamilton	10,000

Notes: (1) Considers the One NZ Stadium project, a multipurpose stadium (~30k capacity) cited to open in 2026; (2) Excludes the capacity attributable to indoor sports facility at Queenstown Events Centre

Source: Sport NZ provided material 'Current venues – roughly Medium and Large', Austadiums, Deloitte analysis

Attendance at Live Sports Venues

New Zealand leads other Western countries in live sports venue seating availability with 27 Large and 2 venues servicing a population of 5.2 million people. Specifically, for every sporting facility seat in a venue with a capacity of at least 10,000, there are only nine people who in theory could demand it, reflecting a high seat-to-population ratio.

Figure 12: International comparison of population-to-seat densities

(Cumulative live sports venue capacity, minimum 10k seat venues, select countries)

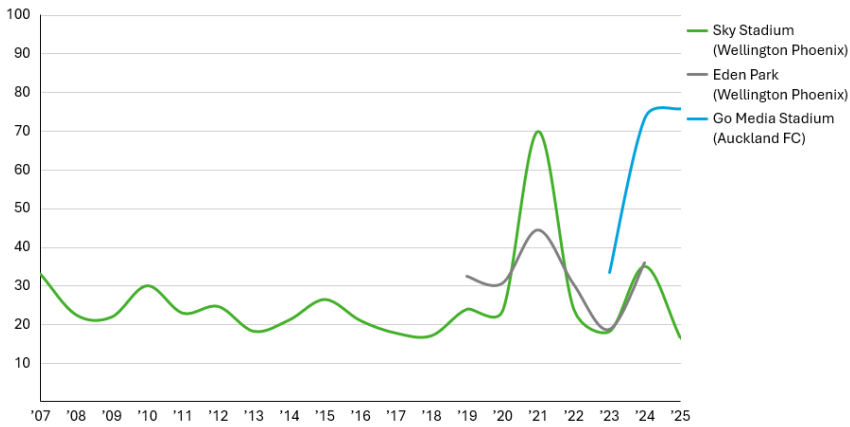
	# of Venues w/ 10k+ Capacity	Cuml. Capacity ¹	Population	Population-to-Seat Density
New Zealand	27	572k	5.3m	9.3x
Australia	125	2,236k	26.7m	11.9x
United States	429	13,692k	340.1m	24.8x
South Africa	86	1,889k	63.2m	33.5x
Canada	20	495k	40.1m	81.0x

Notes: (1) Considers the total number of seats across all live sports venues considered within their respective geography
Source: World Bank, various consolidated lists of stadiums (e.g. Austadiums, Wikipedia), Deloitte analysis

Recognising the level of sports fan engagement seen across these countries, this suggests that New Zealand's current supply of Large and Medium live sports venues should currently be able to provide fans with more than enough opportunity to attend games in person. Conversely, one could also conclude that filling these seats is a more challenging prospect in New Zealand than in other western countries, simply because the overall pool of potential fans is smaller. As a result, unlike larger markets, where it's possible to focus on a narrower, more targeted fan demographic and still fill venues; venues owners in New Zealand likely need to cater to a broader and more diverse range of fan archetypes and experiences.

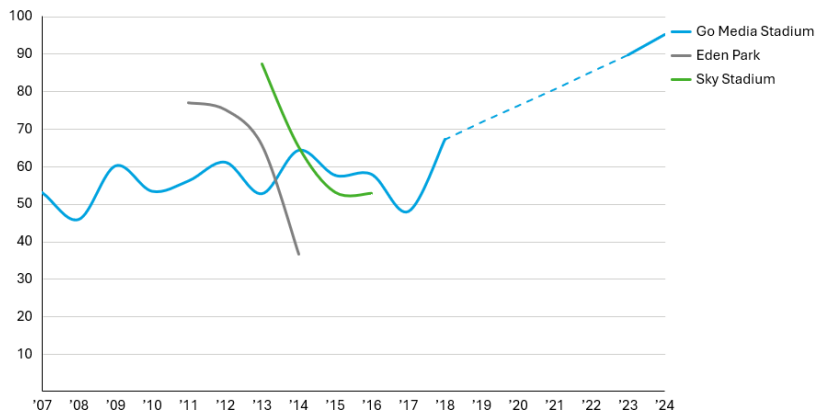
To support this notion of oversupply, an analysis of historical attendance data across major New Zealand live sports venues used by Super Rugby, the NRL, and the A-League reveals consistent underutilisation. With the exception of Apollo Projects Stadium during the 2021 and 2022 Super Rugby seasons, a relatively smaller venue (~19k capacity), no other venue has averaged more than 60% capacity over the course of a season since 2019. Similarly, aside from an anomalous A-League match against Western United in mid-2021, New Zealand's first post-lockdown fixture, likely driven by heightened demand for social experiences, Wellington Phoenix has never averaged above 40% attendance at Sky Stadium since the club's inception in 2007. Auckland FC has however shown strong utilisation recently, ~76% in the 2024/25 season, however this is likely a function of the team's buoyed on-field performances, reflected in them winning the regular season premiership, driving greater in-person attendance. Further, although noting that the New Zealand Warriors have seen strong utilisation levels (>90%) during the 2023 and 2024 seasons, attendance prior to this seldom rose above 70%. This stagnation in attendance suggests that both sports, and the live sports venues in which they play, are struggling to find ways to attract fans beyond their core engaged fan archetypes.

Figure 13: A League (Wellington Phoenix, Auckland FC) average venue utilisation
 (Attendance as a % of seating capacity, 2007-2024, select venues)



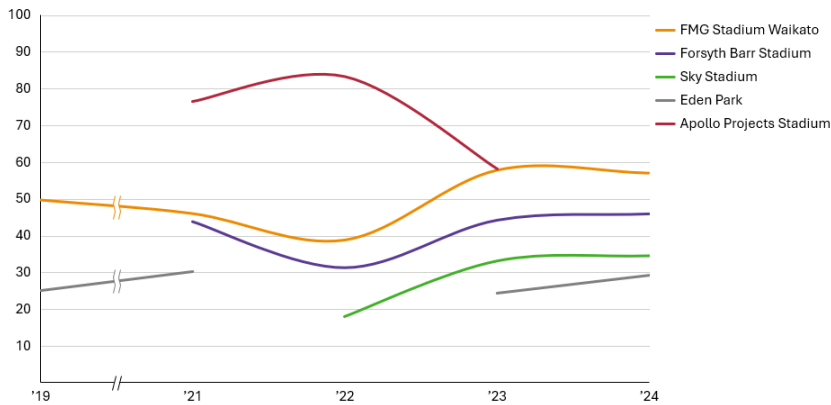
Source: Ultimate A-League, Deloitte analysis

Figure 14: NRL (NZ Warriors) average venue utilisation
 (Attendance as a % of seating capacity, 2007-2024, select venues)



Notes: Blue dotted line is an implied trajectory made due to the lack of available data for the 2019 to 2022 seasons
 Source: Various New Zealand Warriors season pages (Wikipedia), Deloitte analysis

Figure 15: Super Rugby average venue utilisation
 (Attendance as a % of seating capacity, 2019-2024, select venues)













Source: Various Super Rugby pages (Wikipedia), Deloitte analysis

Digital Viewing Options Available in New Zealand

As an alternative to attending sporting facilities, New Zealanders have access to a wide range of digital sports viewing options. Sky Sport leads the local market, offering pay TV, subscription video on demand (SVOD), and free-to-air (FTA) access. In addition, international platforms like beIN Sports, Disney+, and DAZN provide access to global sports content. Across these services, digital consumption is significantly more affordable than attending games in person, with most subscriptions priced between NZD \$15–20 per month, except for Sky Sport, which ranges from NZD \$55–60 per month, owing to its more comprehensive coverage.

Figure 16: Overview of sports broadcast and streaming platform providers available in New Zealand

Provider	Access Type	Pricing (Monthly Fee, \$NZD)	Coverage
	Pay TV, Pay-Per-View	\$59.99	Rugby (super rugby, NRL, international, lower leagues), Premier League, netball, international cricket (from 2026/27), NBA, NFL, Formula 1, PGA and LPGA golf, Australian Open, UFC, boxing
	Free Subscription (*requires Sky TV subscription)	n/a	*Sky TV (incl. Sky Sport) delivered through device streaming
	Paid Subscription (Live and On-Demand)	\$54.99	*Same offering as sky sport but delivered as a standalone streaming service
	Free-to-Air (Via Freeview), Ad-Supported Streaming	n/a	Limited selection of free-to-air sports content, including occasional live events, delayed coverage, and sports entertainment programming
	Free-to-Air, Ad-Supported Streaming	n/a	A-League football, Super Smash T20 cricket, limited international cricket (2025/26 only), and partial netball (Saturday games, delayed).
	Paid Subscription (Live and On-Demand)	\$14.99	European football including Serie A, La Liga, Bundesliga, EFL, Carabao Cup, and Scottish Premiership
	Paid Subscription (Live and On-Demand)	\$16.99	NBA, NFL, MLB, NHL, women's competitions, and studio shows (e.g. SportsCenter)
	Paid Subscription (Live and On-Demand)	\$14.99	UEFA Champions League, Europa League, and Conference League football competitions
	Free-to-Air (via FIFA+), Subscription, Pay-Per-View	Varied	Domestic football excluding a-league is free-to-air, however rugby, basketball, ice hockey futsal, and volleyball require paid subscriptions
	Paid Subscription (Live and On-Demand), Pay-Per-View	Varied (\$10.00 – \$20.00)	Field hockey, including national tournaments, club leagues, and school competitions

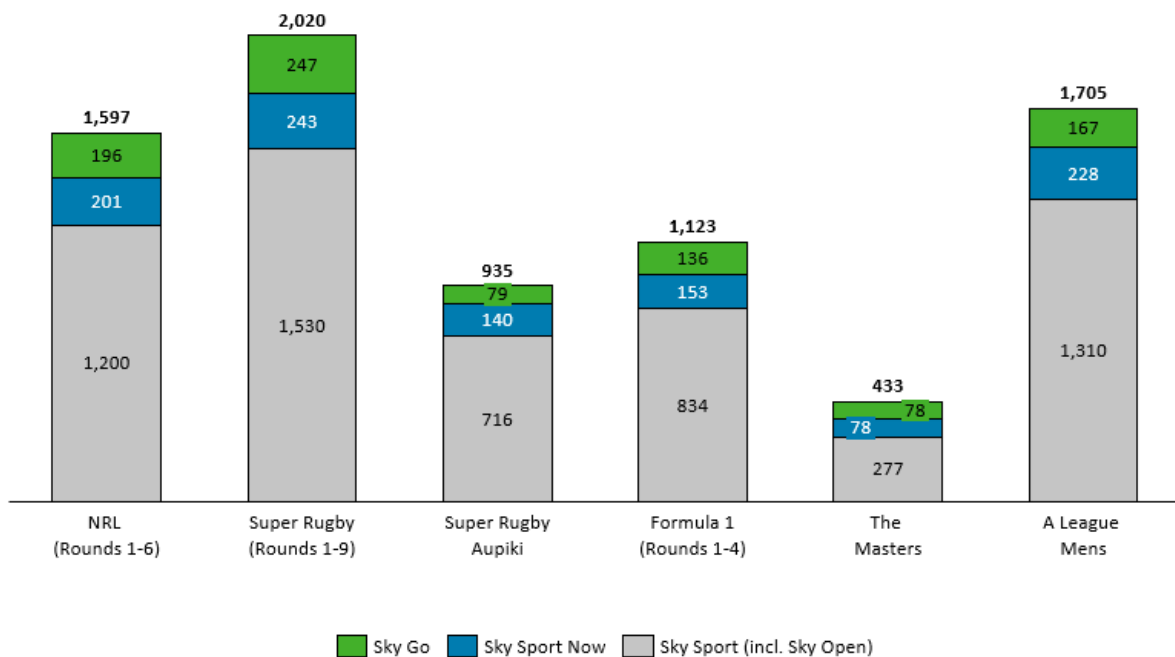
Source: Respective company websites, Deloitte analysis

Viewership Levels

Over the past decade the quality of the digital viewing experience coupled with the increased depth and breadth of available channels means that digital viewership continues to rise. Analysis of Sky New Zealand viewership data highlights three key insights:

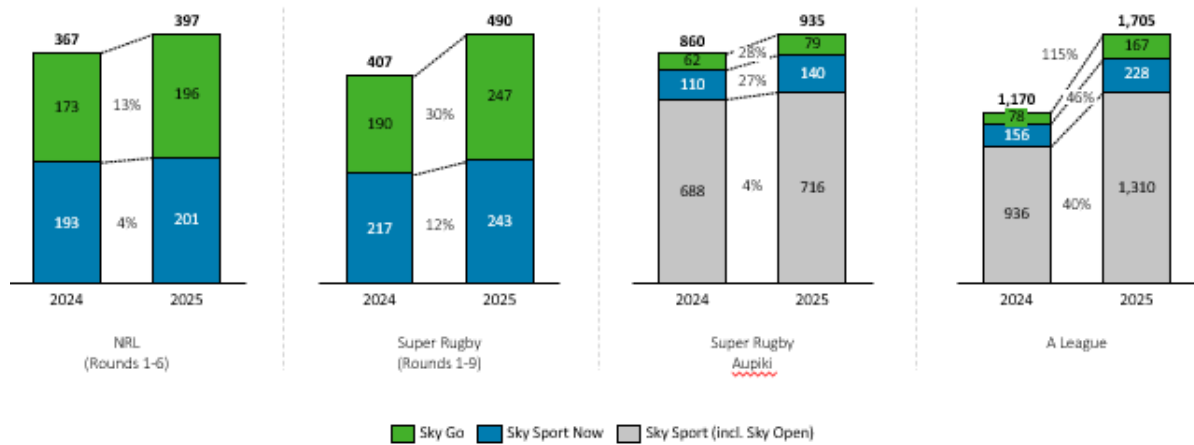
- Rugby dominates the screens with the first nine rounds of the super rugby season amassing over 2 million unique viewers and the first six rounds of the NRL almost matching the total viewership of the entire A-league season.
- The recent launch of Auckland FC in 2023 and their quick success in winning the 2024-25 A-League regular season has however helped A-League viewership catch up ground on rugby, achieving around 46% year-over-year growth across Sky’s platforms.
- Despite operating with a shorter seven-round season, viewership of Women’s Super Rugby is strong, managing to attract ~44% of the viewership garnered in the first 9 rounds of the men’s competition.

Figure 17: Sky New Zealand total people who have watched key sports competitions
 (# of unique viewers, 000s, 2025)



Source: Sky Sport New Zealand

Figure 18: Sky New Zealand growth in digital sports consumption 2024 to 2025
 (# of unique viewers, 000s, 2024-2025, % growth)



Source: Sky Sport New Zealand

Attendance vs Viewership

With spare capacity being a persistent feature of live sports attendance in New Zealand, it's clear that live sports venue operators are not constrained by structural limitations in terms of how many fans can attend. This means that any future facility strategy should have two imperatives that will need to be managed in consultation with venue owners and sports rights holders; protecting the core by enhancing the experience for those who already attend; and attracting new casual fans, those who currently choose not to come. The core infrastructure (i.e., seating and facilities) is already in place to support significantly larger crowds. The primary challenge lies in designing upgrades and experiences that actively incentivise more New Zealanders to walk through the gates as opposed to watching at home.

Between 2024 and 2025, platforms like Sky Sport Now and Sky Go recorded double-digit growth in viewership across the NRL, Super Rugby, the A-League. This signals a growing preference for convenient, accessible, and on-demand ways to consume live sport. If these digital offerings continue to evolve, becoming more comprehensive, interactive, and affordable; it's not unreasonable to expect that in-person attendance could decline in the future if the live sports venue experience doesn't commensurately become more compelling.

Facility Redevelopment Choices

Key considerations for making upgrades across the different types of live sports venues.

In-Person Fan Hierarchy of Needs

Shifts in fan preferences point to a wide array of potential live sports venue upgrade options, many of which reflect cutting-edge innovations. While these help signal what disruptive possibilities may look like and how to draw in new generations of fans, it's important to first understand the broader landscape of upgrade options and consider what will make the most meaningful impact. Broadly speaking, upgrade options for live sports venues can be distilled into four key categorisations:

Non-Negotiables



Basics



Differentiators



Disruptors



1 | Non-Negotiables:

There are five core sets of expectations that every fan brings to any live sports venue, foundational requirements that must be met to create any meaningful in-person experience. If a live sports venue fails to deliver on these basics, it cannot reasonably expect to satisfy or retain its fan base

Experience Consideration	Example Venue Upgrades
Safety: Fans expect to be safe and secure before, during, and after an event	Access controls, surveillance and monitoring, crowd management staffing
Comfort: Fans expect the live sports venue to be comfortable, and clean	Seat size/spacing, seat material/texture, inclusive and hygienic toilets
View: Fans want the view from their seats to match their expectations	Distance between seats and field/court, elevation of seating, viewing angle
Quality: Fans want a high-quality on-field product	Field/court surface quality, performing teams
Atmosphere: Fans expect an exciting atmosphere in the live sports venue	Density of fans, reverberation structures to amplify natural acoustics

2 | Basics:

Ancillary elements of any in-person experience that often prove to be material pain points for fans. They are not in their own right factors that will outright motivate a fan to attend a live sports venue however they can stifle engagement if not adequately supported.

Experience Consideration	Example Venue Upgrades
Accessibility: Fans expect physical entrance through the gates and their pre/post event travel options to be seamless	On-site parking, integrated public transport access, contactless ticketing, smart gates
Exits: Fans want to exit the event quickly	Number of access points, fast lanes, weather protection
Navigation: Fans want to be able to navigate the live sports venue easily	Wayfinding apps, digital signage, lighting cues
Concessions: Fans expect the provision of concessions inside the venue and that the concessions provide fair value	Self-service / tap + go kiosks, in-seat delivery, cashless payments, dynamic pricing, express pickup counters

3 | Differentiators:

Standalone novel experiences that personalise the in-person experience for any fan. These types of live sports venue upgrades serve to not only solidify fan engagement, in the form of greater attendance and retention, but also simultaneously drive increased dwell time and spend across ancillary channels (e.g. restaurants, retail, etc.)

Experience Consideration	Example Venue Upgrades
Identification: Enhancing fans ability to align with a team, geography, and/or community they align with	Safe-standing areas, dedicated family zones, cultural landmarks (e.g. statues, murals, tribute walls)
Distinctiveness: Providing experiences unique to the venue/destination	Premium viewing areas (e.g. boxes), Augment reality / virtual reality, signature concession / merchandise offerings
Alignment: Providing experiences that match fans interests & identity	Targeted promotions / discounts, in-app gamification
End-to-End: Providing entertainment options before, during and after the game	Novel activities (e.g. fan-zones), venue tours (e.g. skywalks), restaurants

4 | Disruptors:

Building upon live sports venues with features that help to meet the social infrastructure needs of nearby communities, serving to transcend the legacy mindset that a live sports venue is just for sports, just for fans, or just about event value, but rather that a live sports venue can be a precinct that operates 7 days a week and focus on the lifetime value of attendees. In this regard, whereas sporting facilities can enhance the fan experience through individual upgrades and/or other changes within the facilities themselves, a precinct, for it to be compelling, requires a combination of enhancements that connect the venue to surrounding businesses. Types of potential precinct features can include but are not limited to:

Experience Consideration	Example Precinct Features
Consumerism: features that encourage social behaviour beyond the sporting event	Dining (e.g. high-end restaurants, fast food), bars, cinemas, retail outlets
Everyday Needs: features that are not coupled with the sporting experience but provide convenience for local communities	Groceries, healthcare services (e.g. dentists, GPs), public transport hubs (e.g. train/bus stations), fitness centres
Community Recreation: non-paying public access spaces	Parklands, public pools, walking / biking trails, grassroots sporting facilities
Accommodation: Supporting people’s ability to be in closer proximity to the sporting facility and/or benefit from the precinct	Permanent accommodation options, hotels

For example, whether its focused on creating social spaces (e.g. restaurants, bars, retail outlets, cinemas, etc.) or even on-site hotels, permanent residencies, office spacing; disruptors focus on evolving live sports venues to become precincts that operate 7 days a week, appeal to everyone in surrounding communities, and shift to focus on the lifetime value of its attendees

Applications for New Zealand

Regardless of venue size or purpose, getting the non-negotiables and basics right is essential for all live sports venues across New Zealand. Every fan expects to feel safe, comfortable, and able to enjoy a clear view of the game in a vibrant atmosphere. These are foundational elements that define the minimum standard of any in-person experience. However, while these needs are universal, the depth of upgrade solutions needed by not only each tier but by each live sports venue should largely differ. For example, Eden Park with its mass congregation of tens of thousands of fans will require advanced surveillance and smart crowd-flow systems to provide a safe experience for fans. However, in the case of Harry Barker reserve, as long as the floodlights that provide lighting of an evening are well maintained, the stewards are trained to effectively manage small crowds, and there is clear signage for people to find their seats, one can reasonably believe safety is being adequately promoted. In essence, every live sports venue should be continuously investing in its non-negotiables and basics to ensure they meet the expectations of fans but doing so in a way that reflects the profile and size of the fanbase(s) attending along with their commercial aspirations.

Figure 19: Relevance of potential upgrade solutions by sport facility size
(illustrative)

	Non-Negotiables	Basics	Differentiators	Disruptors
Large	✓	✓	✓	✓
Medium	✓	✓	✓	
Small	✓	✓		

Figure 20: Fan response to “what would have improved your experience at the most recent live sporting event you attended” (2024)

Live sports venue feature	Gen Z	Millennials	Gen X	Boomers	Matures
Upgraded physical facilities	43%	45%	43%	57%	63%
More or improved ancillary events	18%	17%	16%	13%	14%
More or improved ways to interact (e.g. competitions)	19%	20%	18%	15%	10%
Improved digital experience (e.g. wayfinding apps, click 'n' collect concessions)	19%	18%	23%	15%	13%

Source: 'Media and Entertainment Consumer Insights' survey 2025, Deloitte

Case Study: Merivale

In 2021 and 2022, Merivale became the exclusive food and beverage partner for the SCG and Allianz Stadium respectively. Predicated on enhancing the quality, breadth, perceived value-for-money, and ease of ordering. The partnership brought Merivale’s diverse and premium brands, such as Totti’s, Bert’s Bistro, Jimmy’s Falafel, and more into the venue experience. Despite being a Large live sports venue with comprehensive food and beverage options already, these concession upgrades at the SCG and Allianz Stadium underscore the ongoing importance of reimagining non-negotiables and basics as powerful drivers of fan satisfaction and overall event-day appeal.

As live sports venues grow in size and significance, so too do the expectations of the fans who attend them. Given there are more people, more varied fan types, and more complex experiences to cater for; this is where differentiators need to come into play. What makes differentiators worthwhile in Large and Medium live sports venues is that their scale supports the investment(s) that needs to be made. With bigger crowds comes a stronger commercial foundation for more transactions, more touchpoints, more data to ingest, making the economics of ambitious, experience-led upgrades far more viable. Moreover, the sheer variety of fans means that one-size-fits-all fan experience proposition, synonymous with a Small venue, does not hold true for larger venues. Differentiators unlock the ability to meaningfully engage with more fan archetypes, which is proving to be more relevant now than ever before given younger generations are increasingly demanding a more diversified in-person experience.

Lastly, consideration of disruptive upgrades, namely transforming live sports venues into multi-use social precincts, should be primarily reserved for Large and larger Medium venues. These venues benefit from consistently high footfall, making them well-positioned to evolve beyond matchday use into broader lifestyle and community destinations. However, these decisions and investments must be guided by a clear strategic goal that extends far beyond the remit of what a live sports venue owner alone can achieve. Disruptors redefine the venue’s purpose from being one that hosts events to becoming a vibrant urban precinct that contributes to the social and economic fabric of the surrounding area. Realising this vision requires a coordinated approach involving local government (e.g. for infrastructure and zoning), commercial partners (e.g. retail, hospitality, and entertainment tenants), and community stakeholders. These are city-shaping interventions and must be treated as such.

Conclusion

Where to next?

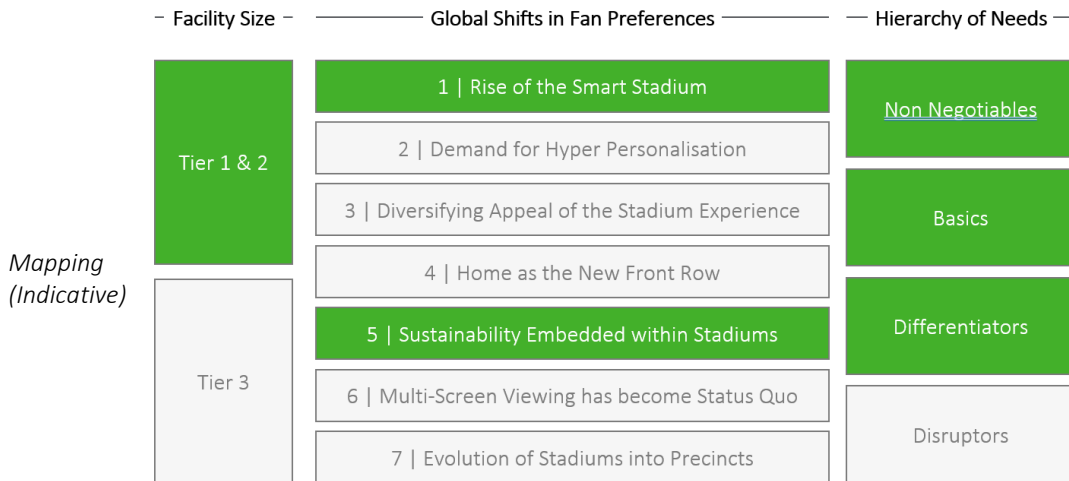
Four scenarios have been explored to demonstrate that any choices surrounding what to upgrade within live sports venues will first and foremost be a function of what impact is sought. In this regard, each objective explored indicatively maps the types of sporting facilities that should naturally be prioritised, the relevant global shifts in fan preferences that must be addressed, and the corresponding types of upgrades required to achieve it.

Of the four scenarios illustrated below, the first indicatively articulates what should be upgraded in accordance with the strategic objectives already prioritised by Sport New Zealand, namely “supporting the delivery of national and international sport, and major and mega sporting events”. Supplementing this, three alternative objectives have also been mapped to highlight where effort and investment could be prioritised can differ significantly.

#1

Objective: Attract and Host Major and Mega International Competitions

Description: Position the country and its live sports venues as premier arenas capable of securing and successfully hosting major international sporting events, thereby enhancing global visibility and prestige.

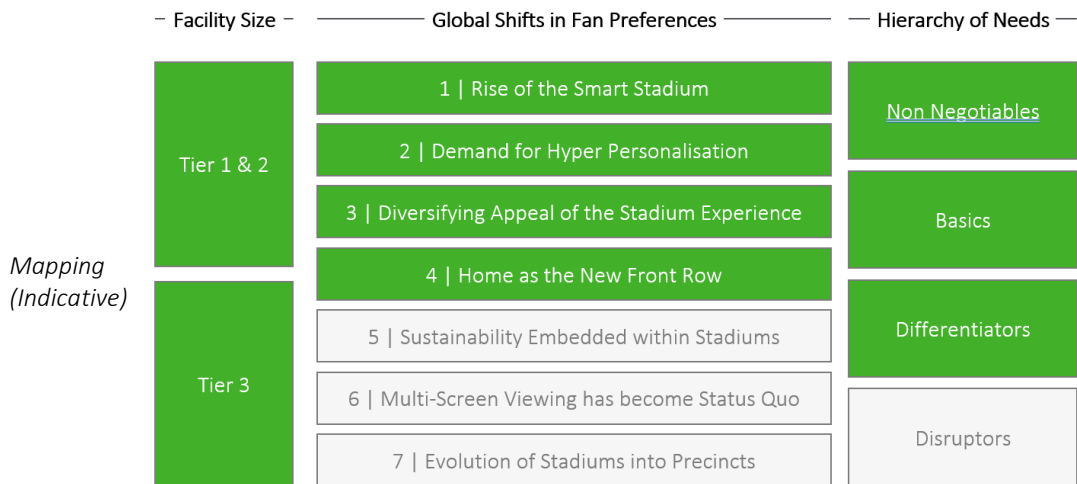


Rationale To attract major international competitions, New Zealand will primarily rely on the appeal of its Large and 2 venues designed to host international-grade events. Governing bodies (e.g. IOC, FIFA, etc.) expect these venues to meet high standards across non-negotiable sports facility elements. As such, smart stadiums equipped with modern technology will be required to help deliver on these.

#2

Objective: Maximise Year Round Event Attendance and Fan Engagement

Description: Drive initiatives that increase live attendance across all live sports venues, optimising utilisation rates to cultivate a vibrant, engaged fan community and bolster the sport’s commercial viability.

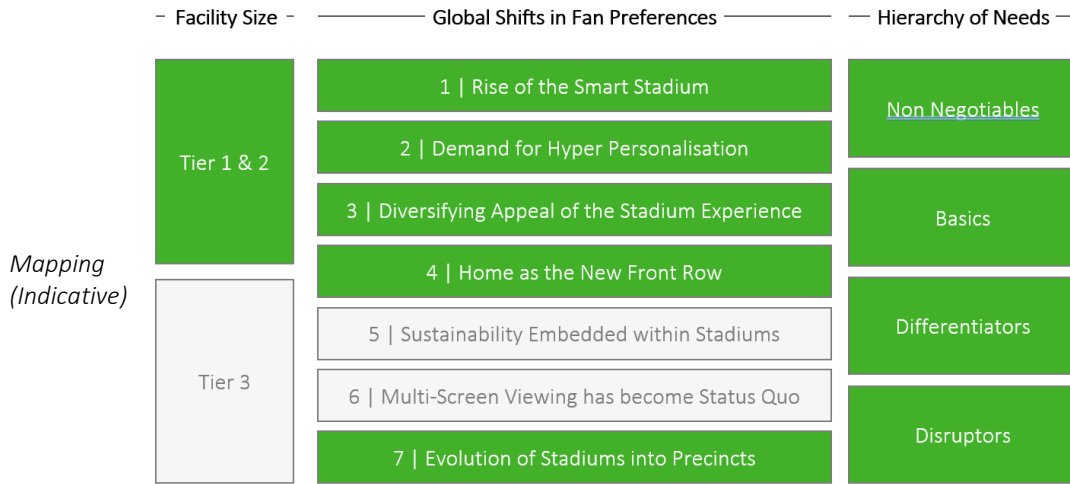


Rationale To boost overall engagement, New Zealand will need to work through a phased approach to upgrading strategically selected live sports venues, across all three tiers. For Large and 2 live sports venues, integrating technology to deliver hyper-personalised experiences will be important to help compete against the growing demand for digital viewing. In contrast, for smaller Small venues, the focus should be on getting the basics right and meeting core fan needs

#3

Objective: Support Broader Socioeconomic and Community Development Goals

Description: Leverage live sports venue redevelopment projects to contribute to wider social objectives such as employment generation, infrastructure enhancement, and community wellbeing, aligning sport with broader national development priorities.

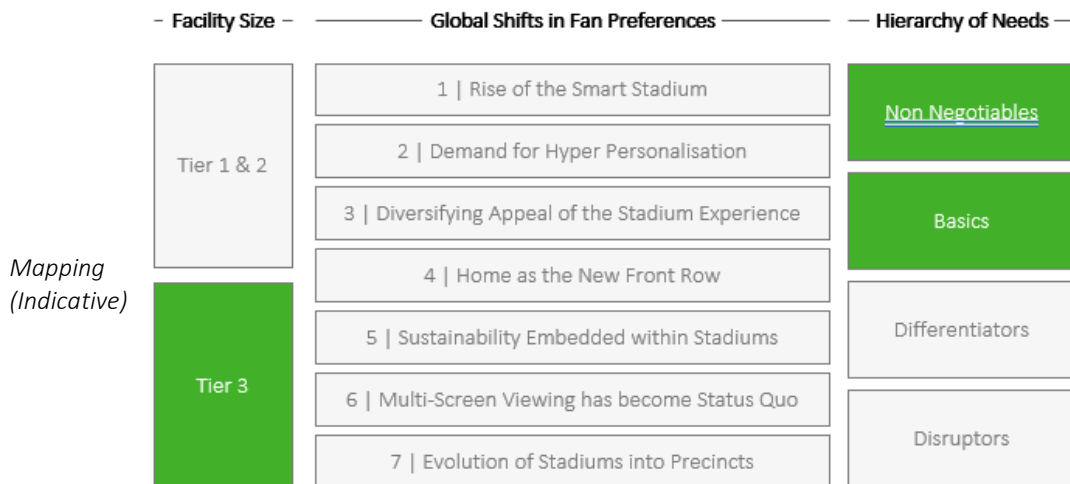


Rationale To reposition live sports venues as precincts that drive socio-economic and community development, Large and 2 venues will require significant transformation. This includes integrating surrounding infrastructure to support the broader precinct model, while also modernising the live sports venues themselves to serve as the centrepiece and crown jewel of the precinct experience.

#4

Objective: Ensure Equity in Fan Experience Across Regions

Description: Provide consistent and high-quality live sports venue experiences for fans in both major cities and smaller regional centres, thereby promoting inclusivity and strengthening the nationwide support base for sport.



Rationale To promote greater equity in fan experience across New Zealand, Small live sports venues require targeted renewal. As outlined above, the priority for these venues is to perfect the basics. Given their scale and focus, embedding advanced differentiators is neither practical nor necessary such that global shifts in fan preferences should carry limited, if any, weight in shaping this objective.

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