FBIN REPORT

Matchday and Stadium Commercial Efficiency

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Introduction

While the season has concluded, stadium gates are closed and matchday commercial performance is being reviewed by club management, this is the right moment to put the season into context. We have analyzed 20 football clubs data across different markets and levels to identify key business insights that can support future matchday strategies and help clubs benchmark their approach against the revenue and efficiency drivers identified across the industry.

Historically, there has been limited visibility into what happens before, during and behind the stadium gates. Following several major stadium safety incidents across football history, clubs and governing bodies increasingly recognized the importance of understanding who enters the stadium, how capacity is managed and how fans are safely guided through the venue. As a result, tracking and controlling the matchday environment initially developed primarily from a security perspective. Starting with ticketing systems and turnstiles and gradually evolving towards more advanced technologies and monitoring solutions.

Today, the same level of visibility creates significant opportunities beyond safety. For marketing and commercial teams, understanding the complete fan journey: from entering the stadium, finding their seat, purchasing food and beverages, visiting merchandise areas or using stadium facilities. This and even more provides valuable insights into how the matchday experience and resulting revenue can be improved. At the same time, fans increasingly expect a smoother experience, shorter waiting times and more convenient services.

This evolution is driving clubs towards a more detailed understanding of the entire matchday journey, with one clear objective: reducing friction, improving operational efficiency and increasing the value generated from each stadium visitor. But which factors truly drive better matchday performance? Which operational and commercial mechanisms and trends create measurable impact, and which ones do not? This report explores these questions.

Throughout this report, the term “club” refers to the organisation responsible for creating and improving the matchday experience and commercial outcome. Depending on the market structure, individual areas of stadium operations may be managed directly by the club, by a stadium operator, or by external partners. Therefore, many of the insights should be considered as opportunities for better alignment between all stakeholders involved in the matchday ecosystem. Also, the purpose of this survey is not to rank clubs by size, revenue or infrastructure level. The objective is to identify operational and commercial mechanisms that influence matchday value across different stadium environments.

Matchday monetization starts with knowing your audience.

Firstly, let's focus on the foundation of every matchday business model: the stadium audience itself. Football has always been a mass-market product and, for most of its history, the majority of stadium visitors remained anonymous to the clubs and event organizers. Driven by major changes in the industry, increasing digitalisation and the need for better understanding of the fan base, clubs gradually moved from identifying mainly season ticket holders towards building a clearer picture of their wider stadium audience. However, ticket ownership does not always represent the actual attendee. A single transaction may include multiple tickets purchased for different people, which means that clubs may know who purchased the ticket but not necessarily who entered the stadium. Therefore, clubs are increasingly introducing different identification methods, including account-based ticket allocation, digital platforms (as is the stadium wi-fi) or other solutions connecting stadium attendance with individual fan profiles.

The survey results show that fan identification has already become a relatively mature capability across the participating clubs. More than half of the clubs are able to identify almost all of their stadium visitors, with the overall average reaching approximately 77% of identified attendees. While it could be expected that newer stadiums or more advanced infrastructure would naturally lead to higher identification rates, the survey does not indicate any significant relationship between stadium age and identification capability. This suggests that fan identification is primarily a result of organisational processes, data strategy and operational setup rather than simply a technology or infrastructure topic.

At the same time, identifying visitors should not be seen as a direct driver of stadium attendance or occupancy. The survey indicates only a limited relationship between identification levels and stadium utilisation, as attendance demand is mainly influenced by broader factors such as sporting performance, market positioning and overall marketing activity. Instead, identification should be understood as the foundation for increasing the value generated from existing stadium visitors through more relevant communication and commercial activation.

The next step beyond identification is therefore the ability to activate the data. The survey shows a clear relationship between the level of identified visitors and the use of personalized matchday-related communication. Clubs combining strong identification capabilities with targeted communication approaches are moving closer towards a data-driven commercial model, creating a distinction between traditional matchday management and more advanced fan monetization approaches.

However, the survey also highlights differences in how clubs

currently use personalized communication. While some clubs at the same maturity level actively use fan data for upselling, cross-selling and targeted matchday offers, others mainly apply personalization for post-match surveys, feedback collection or partner-related communication. This shows that collecting fan data alone does not create a single success stream on how to create commercial value.

Beyond the overall visitor base, clubs also need to understand the different audience segments within their stadium. The survey focused on several commercially important groups, including families, foreign visitors and season ticket holders. The results show significant differences between clubs, reflecting different markets, league environments and commercial strategies. The estimated share of foreign visitors varies from approximately 1% to 20%, while the share of families ranges much more widely, from around 5% up to 80%. Similarly, the proportion of season ticket holders differs significantly, from clubs where they represent less than 20% of attendees to clubs where season ticket holders account for more than 80% of stadium capacity.

These differences demonstrate that there is no universal audience model applicable to every club. The commercial opportunity lies in understanding the specific behaviour, preferences and transactional patterns of each audience segment. By combining fan identification with personalized activation, clubs can move from broad communication towards more relevant and efficient fan engagement.

The survey findings suggest that identification and personalization should no longer be viewed only as digital marketing capabilities. The same principles can increasingly be applied across the complete matchday journey: from entering the stadium, finding a seat, purchasing food and beverages, visiting merchandise areas or using stadium facilities. The future opportunity lies in creating a more connected matchday ecosystem where clubs can reduce friction, improve fan experience and increase commercial value by delivering the right interaction at the right moment.

Operational efficiency is a hidden revenue driver.

Every fan entering the stadium represents an existing commercial opportunity. Beyond the sporting experience, fans naturally consume food, beverages and merchandise during the matchday journey. However, the club does not compete only with other internal stadium activities as fans can also satisfy these needs outside the controlled stadium environment, for example in nearby restaurants or bars. Therefore, the commercial challenge is not only creating demand, but converting existing fan intent into transactions within the club-controlled environment.

The survey highlights that operational capacity is one of the key factors influencing this conversion. Clubs operate under very different conditions: while some clubs have approximately one F&B checkout point per 250 visitors, others manage more than 1,600 visitors per checkout point. This demonstrates that stadium size alone does not determine commercial efficiency; the ability to match service capacity with expected demand is equally important. Limited checkout capacity, inefficient processes or long waiting times may result in lost transactions and lower matchday spend.

However, the data also shows that infrastructure alone does not explain the full picture. The survey does not identify a clear relationship between the number of visitors per checkout point and waiting times, suggesting that operational execution plays a significant role. Factors such as staffing, service workflow, product complexity, stadium layout and queue management can influence how effectively clubs convert demand into completed purchases.

One of the biggest operational changes in recent years has been the adoption of cashless payments. The survey confirms that this transformation is already highly advanced, with approximately 80% of transactions being cashless across participating clubs. However, the results indicate that cashless adoption itself has limited impact on reducing waiting times. This suggests that payment transformation has progressed faster than the wider service transformation. While cashless solutions remove one part of the purchasing friction, they do not automatically solve operational bottlenecks related to service capacity, preparation time or process design.

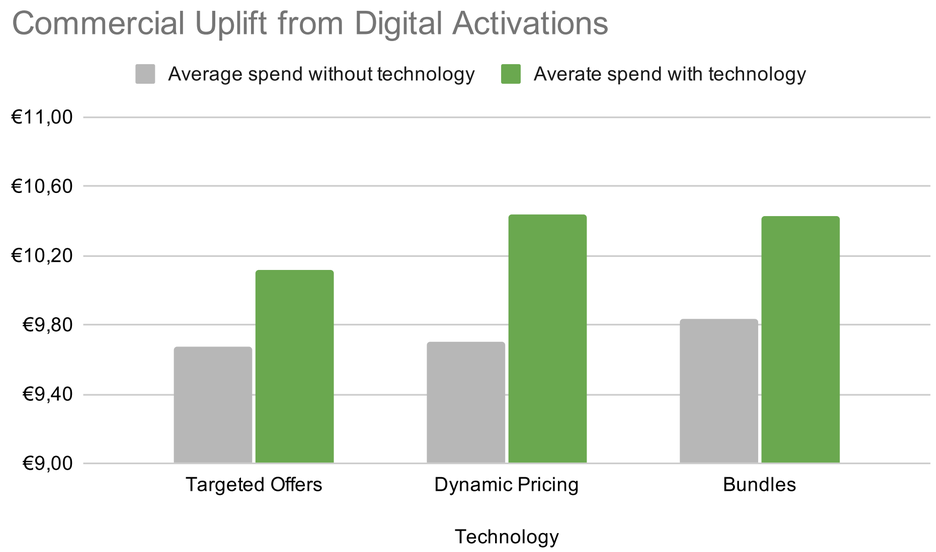
The survey also explored emerging solutions such as express lanes, self-service kiosks and F&B pre-ordering. While adoption remains limited across the sample, these tools represent a shift from traditional service delivery towards more active demand management. The future opportunity for clubs is therefore not only implementing new technologies, but identifying which operational improvements can reduce friction within their specific stadium environment and increase the value generated from every visitor.

Commercial activation separates passive stadiums from monetization engines.

Operational efficiency determines how much existing fan demand a club can capture. The next step is actively influencing that demand. Modern matchday management is moving beyond preparing the stadium environment and waiting for fans to consume. Clubs are increasingly using commercial activation tools to shape purchasing behaviour and increase the value of each interaction.

The survey shows that commercial activation is already becoming a standard part of matchday strategies. Commercial activation, including dynamic ticket pricing, merchandise bundles, exclusive promotions or time-based offers, is widely adopted across the surveyed sample. The results indicate a positive relationship between these activation methods and higher consumer spend, with an average difference of approximately 5% across measured areas. While the survey does not prove direct causality, it suggests that clubs actively managing their commercial offer are better positioned to influence matchday value, depending on broader commercial and operational conditions.

The key difference is that these tools allow clubs to influence not only what fans purchase, but also when and under which conditions they make purchasing decisions. A time-based F&B offer can encourage earlier stadium arrival and distribute demand more evenly. A ticket bundle including merchandise or F&B elements can increase perceived value and



encourage additional spending before the fan even reaches the stadium.

Personalized communication represents another important activation layer. Combined with fan identification capabilities discussed earlier in the report, targeted communication allows clubs to move from broad matchday messaging towards more relevant interactions: for example offering merchandise to specific fan groups, promoting premium experiences or encouraging additional consumption based on previous behaviour.

Compared with physical infrastructure improvements, commercial activation tools can often scale with significantly lower investment and faster implementation. Many of these tools are available as scalable, entry-level solutions and the commercial logic applies regardless of club size and the implementation scope. Expanding stadium capacity or adding new service points requires physical changes, while digital activation can influence thousands of fans through the same logic and platform. Importantly, these tools are relevant not only for large clubs with advanced commercial departments. Their value comes from improving decision-making and relevance of communication, meaning that the principles can also be applied in smaller organisations with more limited resources.

F&B represents the clearest short-term monetization opportunity

F&B is one of the few matchday revenue areas where clubs can directly influence both customer behaviour and operational execution. Unlike ticketing, where demand is heavily influenced by sporting performance and market conditions, F&B consumption happens after the fan has already entered the stadium. The commercial question is therefore not only how many fans attend, but how effectively the club converts attendance into additional spend.

The math is simple as the total revenue consists of count of attendees, conversion rate and the average basket size. These are the three core metrics that matter and should be optimized via their sub metrics and factors impacting the final numbers. Even though it seems simple as the goal is to increase visitors, purchases and basket size, not each of them can be controlled and changed that quickly.

The attendance may be changed by the marketing initiatives, but the long term attendance increase is a result of strategic commercial initiatives or external factors as is the sport performance (such impact may be short term though). What can be changed relatively quickly is the conversion rate and the basket offer.

CONVERSION RATE UPLIFT \ BASKET SIZE UPLIFT	+0%	+5%	+10%	+15%	+20%
+0%	–	€74.813	€149.625	€224.438	€299.250
+5%	€74.813	€153.366	€231.919	€310.472	€389.025
+10%	€149.625	€231.919	€314.213	€396.506	€478.800
+15%	€224.438	€310.472	€396.506	€482.541	€568.575
+20%	€299.250	€389.025	€478.800	€568.575	€658.350

Prerequisites: seasonal F&B revenue: €1 496 250, 25000 attendance, 18 matches in season, base conversion rate 35%, average purchase 9 EUR

Traditional revenue thinking often focuses on increasing prices or expanding product assortment. However, the survey suggests that accessibility may represent an equally important driver and that pricing pressure carries a measurable cost. Clubs whose fans rated in-stadium F&B as „rather expensive“ recorded an average spend of €6.75 per visitor, the lowest of any affordability group in the dataset. By contrast, clubs rated as neutral on affordability reached €10.46 on average: 55% higher. A premium-priced offer does not generate revenue if it discourages the purchase decision entirely.

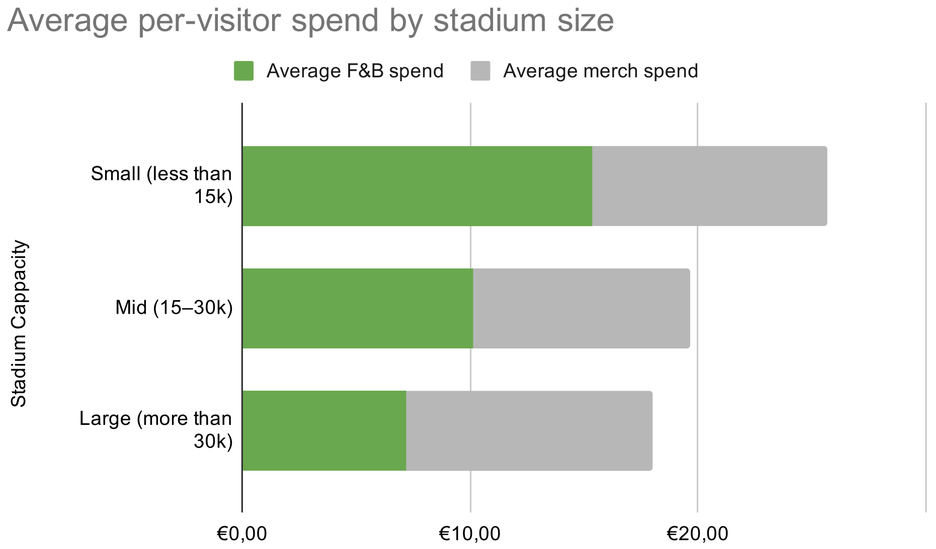
The survey indicates that differences in food and beverage sales performance are exactly matching these: Product strategy influences basket size through pricing, assortment and perceived value, while operational execution influences conversion through service speed, availability and convenience. But it is the club‘s ability to make purchasing convenient: its efficiency is what impacts the conversion rate most directly. Notably, neither the ratio of fans per point of sale nor the share of cashless transactions showed any statistically meaningful correlation with waiting times in this dataset, suggesting that infrastructure alone does not determine queue length. Operational execution as is the service speed, menu complexity, and payment flow, appears to be the differentiator within the surveyed sample.

Stadium size creates potential. Operating models create value.

In the final chapter, we focus on stadium capacity and its relationship with matchday economics. We have claimed that the attendance is something the club would have to change strategically and that the audience is only the enabler. But what about different stadium capacity levels, do all the visitors behave the same way at both small and large stadiums? The survey results demonstrate a statistically meaningful pattern, with one notable outlier: the correlation based on the survey data shows that the average per-visitor spend (food and beverage and merchandise) decreases with higher stadium capacity. The mentioned outlier of this trend proves the claim that the infrastructure creates the opportunity, but the matchday strategy has to make it happen and turn it into an effective revenue stream.

The revenue is not automatically secured just because of the stadium size and it is upon the club to make the operating model efficient enough to get the maximum of its stadium conditions. And, surprisingly, the age of the stadium plays no role in this, based on our survey.

The stadium should therefore not be viewed only as a physical asset, but as a commercial platform requiring alignment between infrastructure, operations and commercial strategy. The highest-performing matchday environments will not necessarily be defined by stadium size alone, but by how effectively clubs and their operational partners understand fans, remove friction and activate commercial opportunities. This also means that improvement opportunities are not limited to clubs planning a new stadium investment. Existing venues can unlock additional value by improving the way data, operations and commercial activities are connected. Infrastructure creates the opportunity and it is the operating model which determines how much value is captured.



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Further Information:
www.footballbusinessinside.com
office@footballbusinessinside.com