

SURVEY 3: THE UPS AND DOWNS OF FAN FEARS, AND WHY HEIGHTENED EMOTIONS REQUIRE SIMPLE GAME DAY SOLUTIONS

PRESENTED BY DIMENSIONAL INNOVATIONS AND PERSUASION STRATEGIES



DREW BERST
DIMENSIONAL INNOVATIONS



KEVIN BOULLY
PERSUASION STRATEGIES

AGENDA

- > ABOUT US
- > SURVEY
- > SURVEY FOLLOW UP
- > SOLUTIONS
 - SHORT TERM
 - NEAR TERM
 - LONG TERM

ABOUT US

WE ARE

**Dimensional
Innovations**

ONE
TEAM

300
PEOPLE

26
YEARS

7
OFFICES

HQ - Overland Park, KS
Lenexa, KS
Atlanta, GA
Minneapolis, MN
Denver, CO
Gainesville, FL
Los Angeles, CA

200K
SQ. FT OF DESIGN
+ BUILD SPACE

Inc.
5000
5 YEARS RUNNING

WE ARE
INNOVATORS
FABRICATORS
ARCHITECTS
ENGINEERS
CODERS
DESIGNERS
ANIMATORS
WELDERS
PROJECT MANAGERS
PAINTERS
UX EXPERTS

who design + build + invent

experiences all over the world







May 11, 2020

AUTHORS

Corporate Defendants: Don't Fear the Post-Pandemic Jury Yet

Compared to nine months ago, jury eligible Americans in the second month of the coronavirus pandemic are more likely to say the government "very much" favors corporations over ordinary Americans. News reports of large corporations using CARES Act government aid while laying off workers could be leading to more anti-corporate reactions, helping to reawaken familiar narratives about corporate greed and callousness. Does this and other anti-corporate bias translate to scary times ahead for corporate defendants? Not necessarily. At least not yet.



Kevin Bouilly, Ph.D.

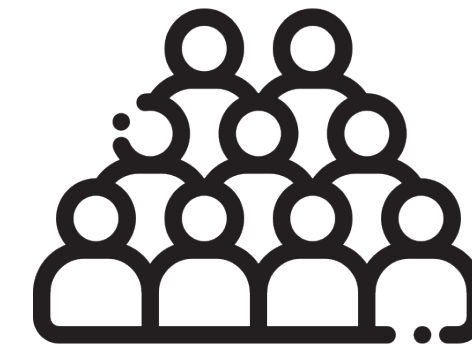
Senior Litigation
Consultant

[View Bio](#)

303.295.8476

HISTORY AND METHODOLOGY

SURVEY METHODOLOGY



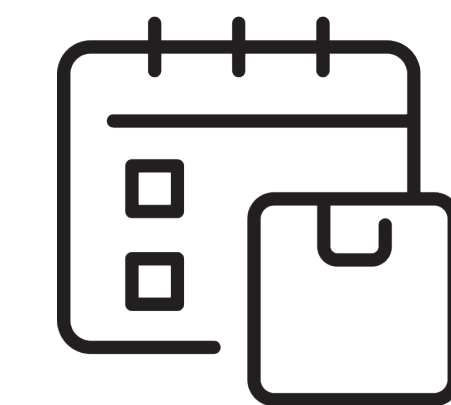
SURVEY 1: 596 SPORTS FANS

SURVEY 2: 403 OF THE 596

SURVEY 3: 312 OF THE 403



**INCLUDING FOUR MAJOR
GEOGRAPHIC REGIONS**



**THREE-PHASE SURVEY
APPROACH OVER TIME**

SURVEY SCHEDULE



SURVEY I: MAY 5 - 7



SURVEY II: JUNE 8 - 10

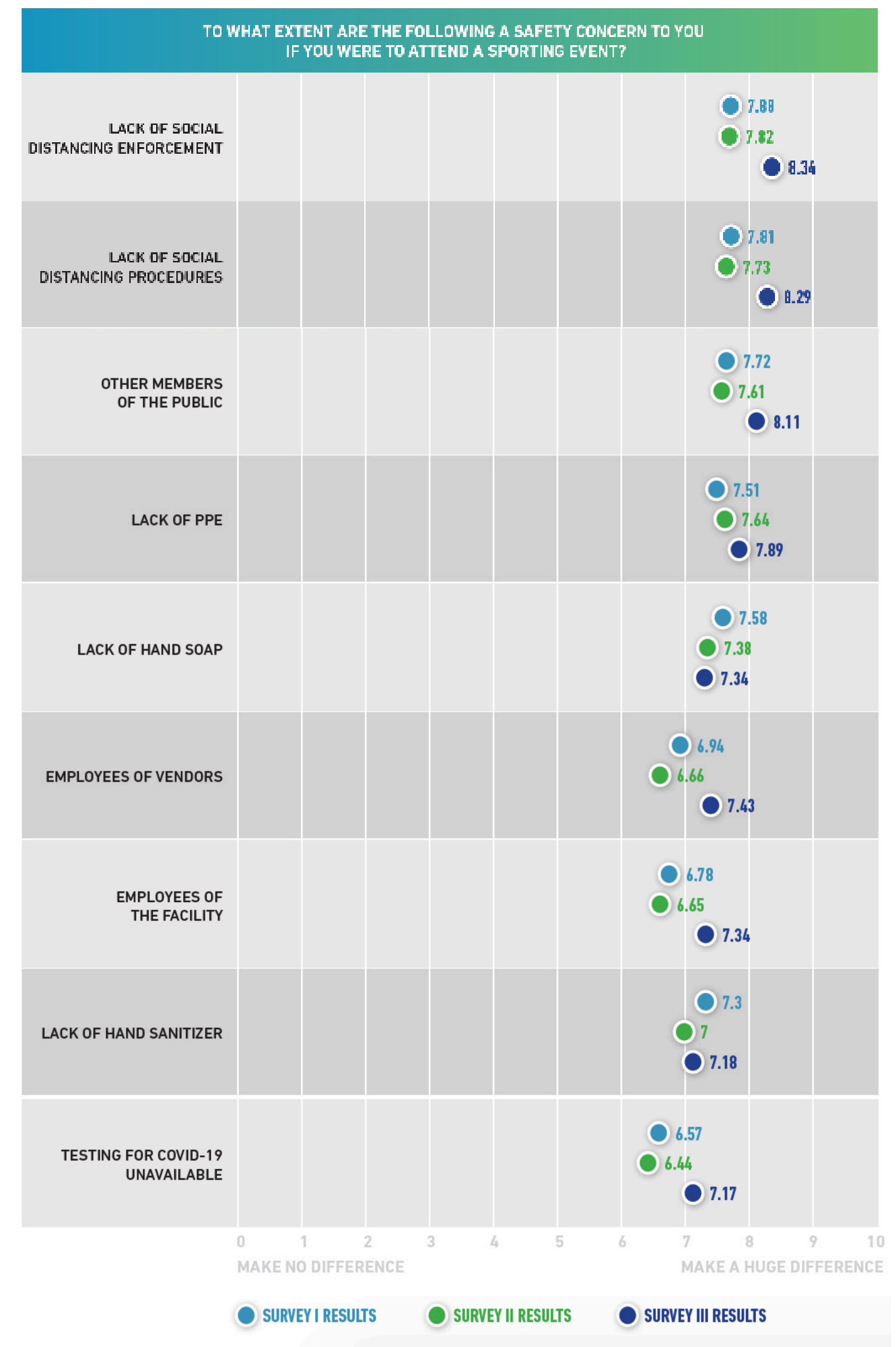


SURVEY III: AUGUST 2 - 4

KEY FINDINGS AND COMPARISONS

CHANGES OVER TIME

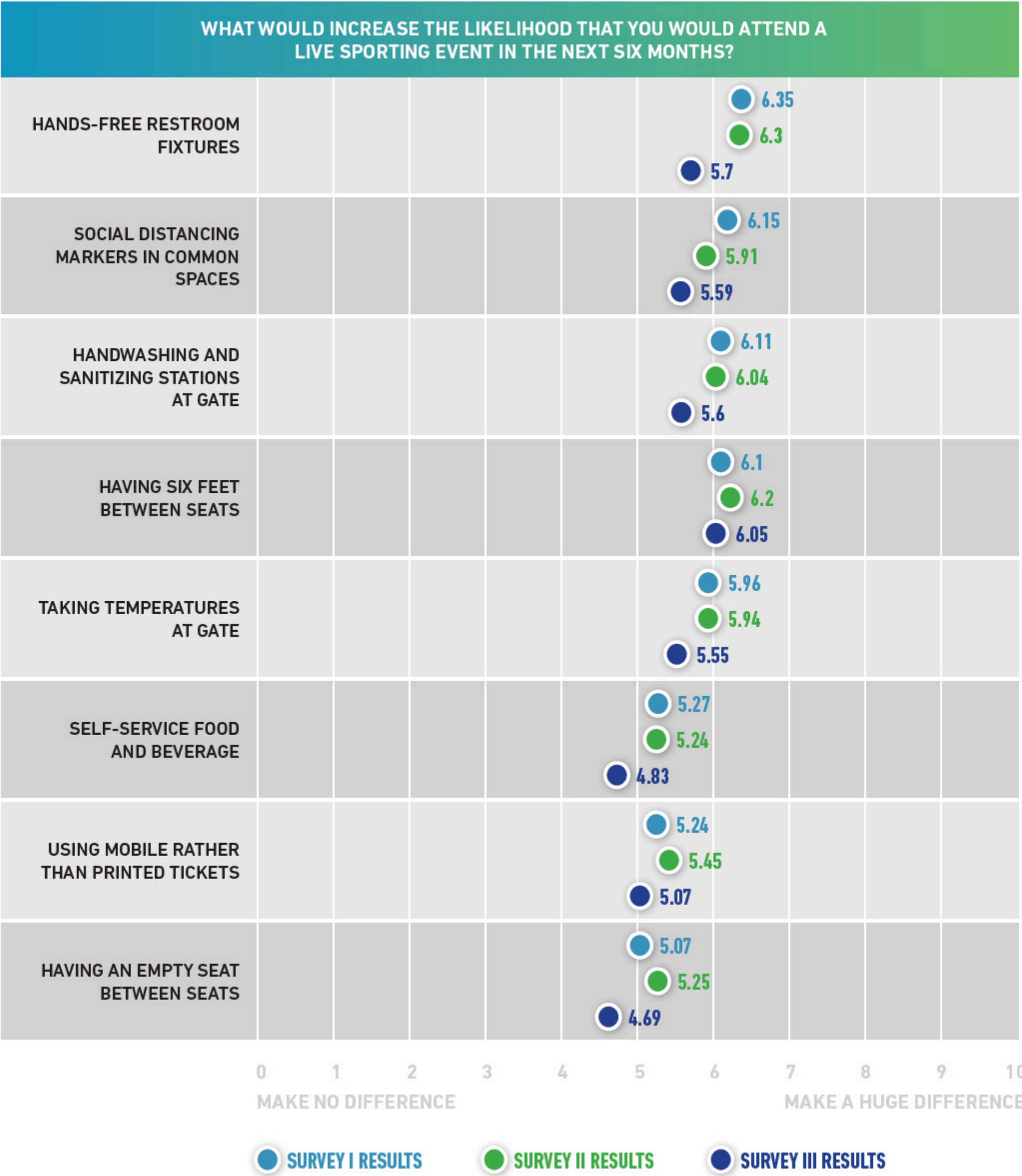
After a minor dip in concern during Phase II, fans are **more likely than ever to express worry** about sources of risk they could encounter when attending an event.



CHANGES OVER TIME

The likelihood that **any of the possible interventions** we tested would increase fans' willingness to attend an event in the next six months has **declined** over time.

Fans are least receptive to the **strategy of leaving an empty seat between seats**.



CHANGES OVER TIME

Fans have grown more wary of attending games over time, particularly if there are no restrictions in place for the event.

Almost **twice as many fans said they would “never” attend a game with no restrictions** at Survey III than at Survey I.

WHEN WOULD YOU ATTEND A SPORTING EVENT IF ATTENDANCE WAS NOT LIMITED IN ANY WAY?

	Survey I	Survey II	Survey III
Immediately	11%	11%	9%
A few weeks	5%	4%	2%
1 month	5%	4%	4%
2–5 months	18%	13%	9%
6 months	16%	15%	14%
A year or more	30%	37%	34%
Never	17%	16%	29%
Month or less	21%	18%	15%
> A year	47%	53%	63%

WHEN WOULD YOU ATTEND A SPORTING EVENT IF ATTENDANCE WAS LIMITED TO HALF CAPACITY?

	Survey I	Survey II	Survey III
Immediately	10%	12%	10%
A few weeks	9%	7%	5%
1 month	11%	10%	7%
2–5 months	24%	20%	18%
6 months	17%	20%	19%
A year or more	22%	21%	25%
Never	8%	10%	16%
Month or less	30%	30%	22%
> A year	30%	31%	41%

CHANGES OVER TIME

Reasoning behind the choice to attend events has not changed substantially over the course of the three phases.

However, the slight dip in health concerns in Survey II is **reflective of the larger trend of lower concern during this time period.**

WHICH IS THE STRONGEST REASON YOU WOULD ATTEND A LIVE SPORTING EVENT IN THE NEXT SIX MONTHS?			
	Survey I	Survey II	Survey III
I miss sports	38%	30%	29%
I want to feel normal again	27%	23%	30%
I'm confident the event will include safety precautions	27%	31%	29%
I'm not concerned about the health risks of COVID-19	4%	10%	5%
Other	5%	5%	8%

WHICH IS THE STRONGEST REASON YOU WOULD NOT ATTEND A LIVE SPORTING EVENT IN THE NEXT SIX MONTHS?			
	Survey I	Survey II	Survey III
I am concerned about the health risks of COVID-19	55%	50%	57%
I am concerned the event will lack proper safety precautions	15%	13%	16%
I would rather spend money on other things	11%	14%	11%
I do not miss sporting events that much	4%	6%	4%
Other	1%	3%	3%

CHANGES OVER TIME

Our **baseline measures of concern about COVID** and **behavioral change** in response to it show an increase in both in Survey III following a **decrease** in Survey II.

HOW CONCERNED OR UNCONCERNED ARE YOU PERSONALLY ABOUT THE CORONAVIRUS EPIDEMIC?

	Survey I	Survey II	Survey III
Not at all concerned	6%	9%	8%
Slightly concerned	25%	28%	21%
Somewhat concerned	28%	30%	32%
Very concerned	42%	33%	39%

HOW MUCH, IF AT ALL, ARE YOU CURRENTLY CHANGING YOUR DAILY ACTIVITIES AND BEHAVIOR DUE TO THE CORONAVIRUS EPIDEMIC?

	Survey I	Survey II	Survey III
Not at all	2%	5%	4%
A little	11%	15%	14%
Some	20%	27%	23%
A lot	38%	33%	37%
A great deal	30%	19%	23%

FACTORS IMPACTING CONCERN

Political ideology is the variable most strongly associated with concern. The gap between liberals and conservatives was at its greatest in Phase II. This finding indicates that the decrease in concern in Phase II was not consistent across populations.

POLITICS AND AVERAGE CONCERN SCORES			
	Survey I	Survey II	Survey III
Liberal	7.97	7.86	8.20
Moderate	7.07	7.29	7.88
Conservative	6.71	6.30	6.94

TIMELINE FOR ATTENDING EVENTS

Fans indicated when they would begin attending events under varying conditions. When looking at four general measures we found:

- > **Individuals who attend at least five games a year are more likely to attend a game within six months than those who don't.**
- > **Trump voters are more likely to go to an event that has no restrictions or is capped at half capacity within six months than Clinton voters. Capping attendance at 25% or requiring masks helps mitigate the effect of political affiliation.**

VOTING BEHAVIOR AND WILLINGNESS TO ATTEND WITHIN SIX MONTHS				
	No Limits	50% Capacity	25% Capacity	Masks
Trump voters	53%	69%	67%	62%
Clinton voters	22%	43%	58%	53%

TAILGATING

- > Over half of fans (55%) said they would have **no interest in tailgating if they could not get tickets** for or were unwilling to attend the game itself.
- > Only **22%** said they would “**definitely**” or “**probably**” **pay to tailgate**. Fans are slightly more concerned about attending a game than tailgating, but about four-in-ten say they see no difference between the two.
- > High interest in **sports, youth, and conservatism** are **linked to willingness to attend tailgate-only events** and paying to tailgate.

FOLLOWING UP: AFTER THE SURVEY

TOTAL RESPONSES: 246 of 312

- > **Reducing capacity to 5%** was the most successful proposed intervention.
- > 44% percent say they would **attend within a month under that condition** (and one in five would go immediately) when the venue is unspecified.
- > A third of respondents say the same when asked about **an indoor event at 5% capacity**.

KEY LESSONS

- > People are afraid of other people
- > People are not ready to come back – basic needs aren't met: Safety
- > Just because you have a game, it doesn't mean people will care.
- > It is about the **Experience**, NOT COVID
- > Consider the Cycles of Solutions

LESSONS FROM HISTORY

AIR TRAVEL

- > Short Term: TSA vs CLEAR
- > Long Term: Major Events Accelerate Change

AIR TRAVEL

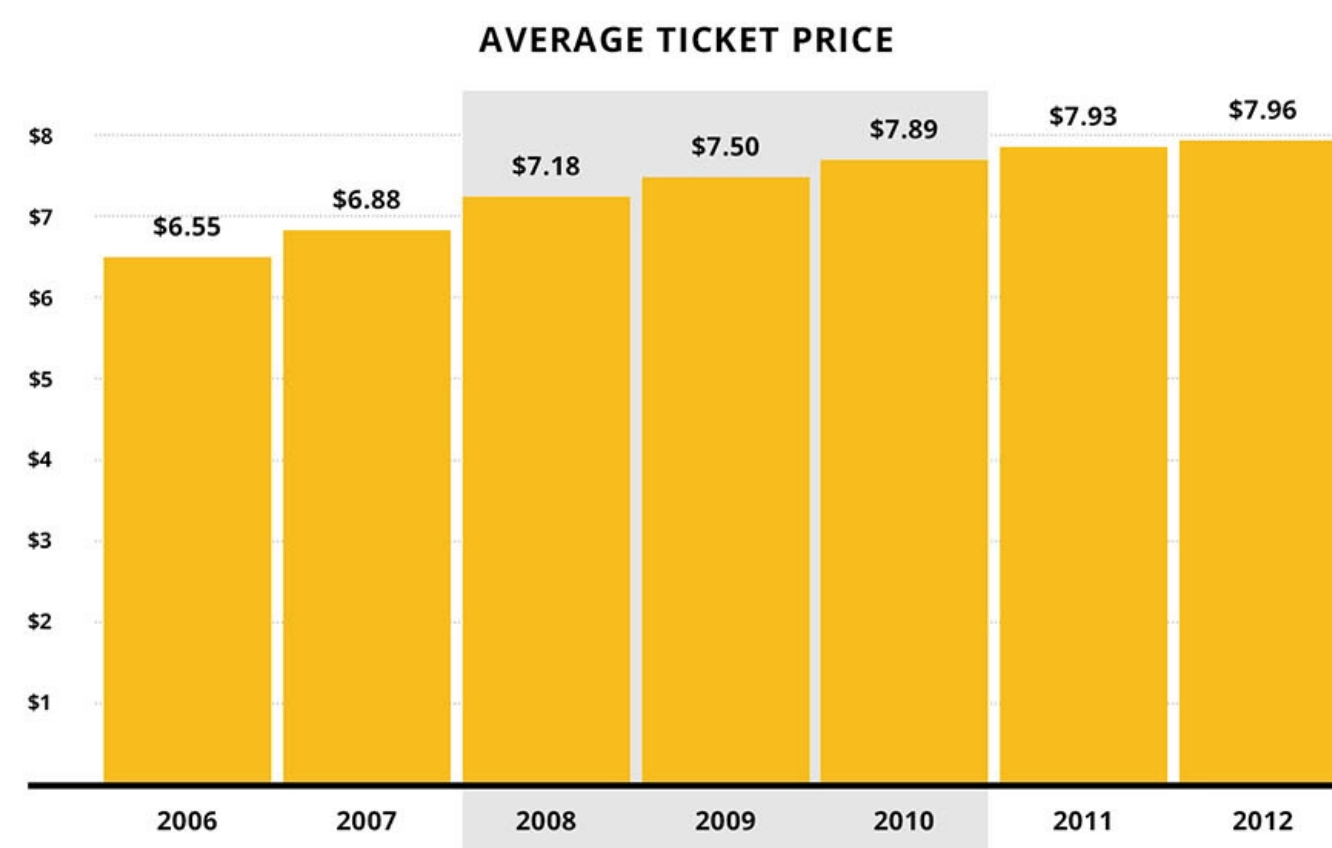
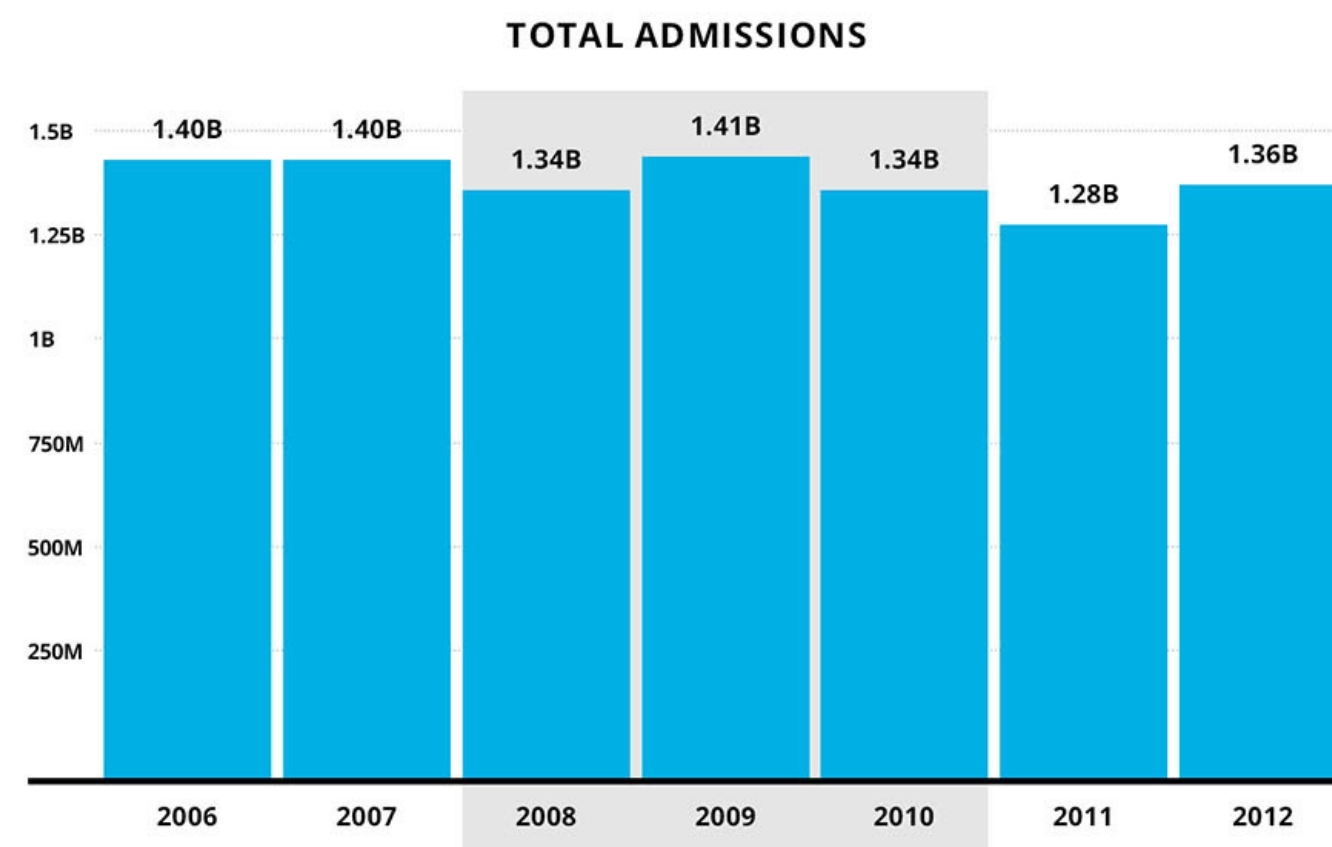
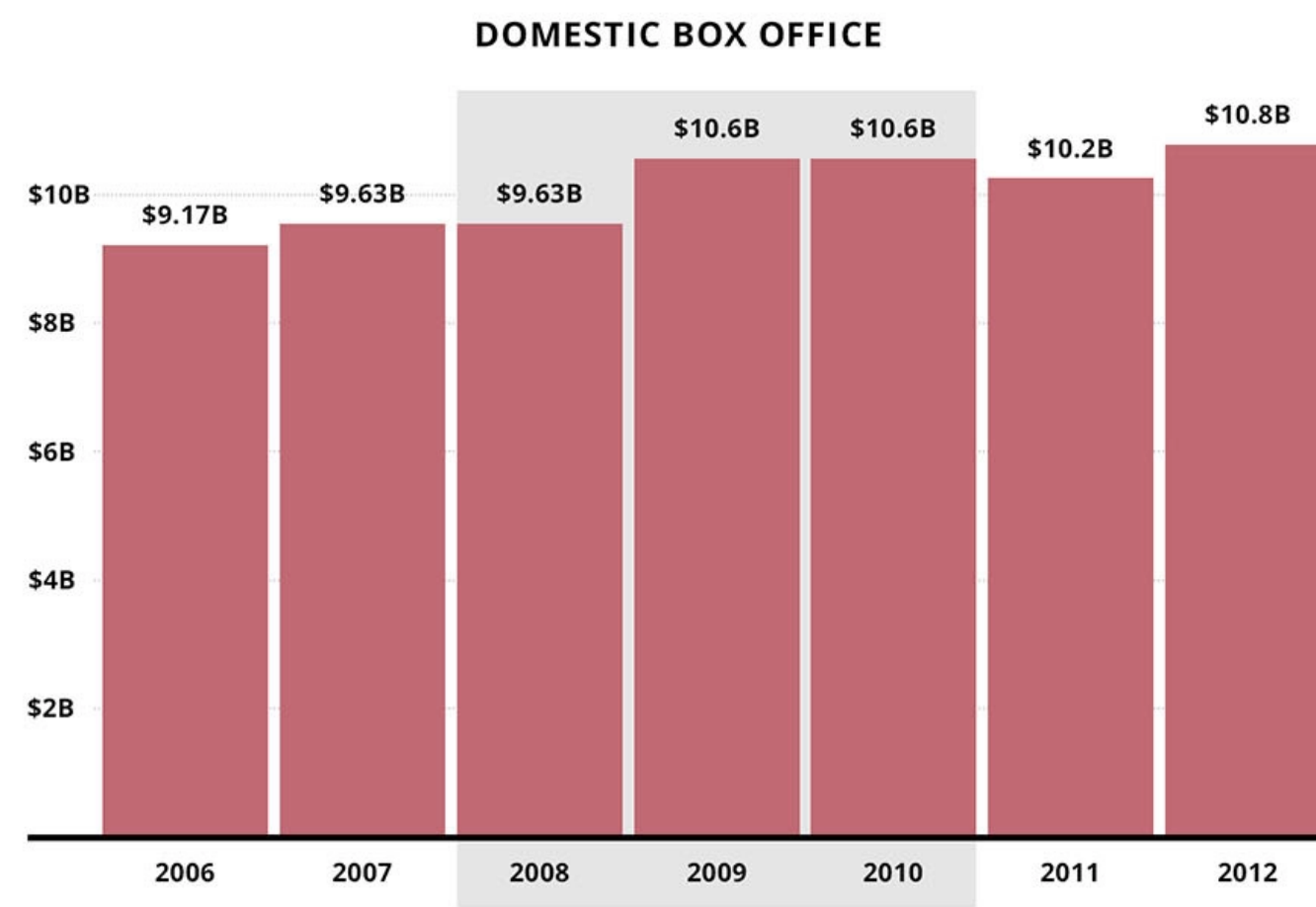


AIR TRAVEL



- Prior to 9/11 65 million travelers per month
- By 2004 recovered and by July 2005, 71 million travelers per month.
- Capacity did not increase at same rate.
- Fewer seats, higher prices and more profit.

MOVIE THEATERS



- Often considered recession proof
- Attendance increased from 2008-2010
- Raised prices
- Cut jobs
- Enhanced offering
- Fewer seats, jobs and higher prices and more profit

SHORT TERM SOLUTIONS: ZONES

A CASE STUDY

HEALTH SMART EXPERIENCE SURVEY

RESULTS SUMMARY

Respondents' average level of concern from one ("no safety concern") to ten ("extreme safety concern") in descending order:



Mizzou fans displayed much less concern about these factors than respondents to the other surveys we've conducted thus far. (Averages exclude the "indoor event" and "outdoor" event variables as these are not included in the national surveys.)

HEALTH SMART EXPERIENCE AUDIT

VULNERABILITY MATRIX



LOCATION ACTIVITY

Detailed list of relevant
spaces and activities
in a given area

ALSO INDICATES LEVEL
OF VULNERABILITY AND
WHO IS ACCOUNTABLE



LEVEL OF FAN CONCERN

The numbered color
spectrum indicates
level of fan concern
related to risk factors
— based on the MU
specific fan survey



RISK FACTORS

Identifies possible
spaces and activities
that present notable
levels of vulnerability



PHYSICAL SOLUTIONS*

Suggests possible
physical changes from
opening windows
to adding signage



PROCESS SOLUTIONS*

Suggests possible
changes in process.
From how tickets are
processed to policies
about capacity



MESSAGING SOLUTIONS*

Suggests possible
language or subject
matter that might
influence behavior

***Suggested Solutions:** The Audit identifies a large range of solutions. MU may determine that some are unrealistic and others ineffective. The intent is to offer a rich diversity of ideas from which to fashion the best strategy.

STUDENT



BRENNNA

LOVES Mizzou football: some of her most fond college memories are home game Saturdays. It's her senior year so she doesn't want to miss out, but is concerned about her health and safety in the large crowds.

Top Issues

- Fans won't take the health and safety standards seriously and how the University will enforce any new rules.
- How this will affect the memories of her senior year.

SEASON TICKET
HOLDERS



SAM & ZACH

Bleed yellow and black: they're all in. It's where they met and they'll stick by their team through it all. They're professional tailgaters – pandemic or not, nothing is going to get in their way of having a good time.

Top Issues

- Game day still feels like game day – seeing the empty stadiums on ESPN is a real bummer.
- Will the new health safety standards increase the time it takes to get into the stadium?

PREMIUM TICKET
HOLDERS



KENNY & LAUREN

Cherish their school and are proud suite holders. Time spent in Columbia has been a major component of their family for decades. Before stepping foot on stadium grounds, they expect proper precautions and updated health and safety standards have been put in place.

Top Issues

- Other fans will ignore health and safety guidelines, especially while tailgating.
- Close quarters in and around the stadium/suites.

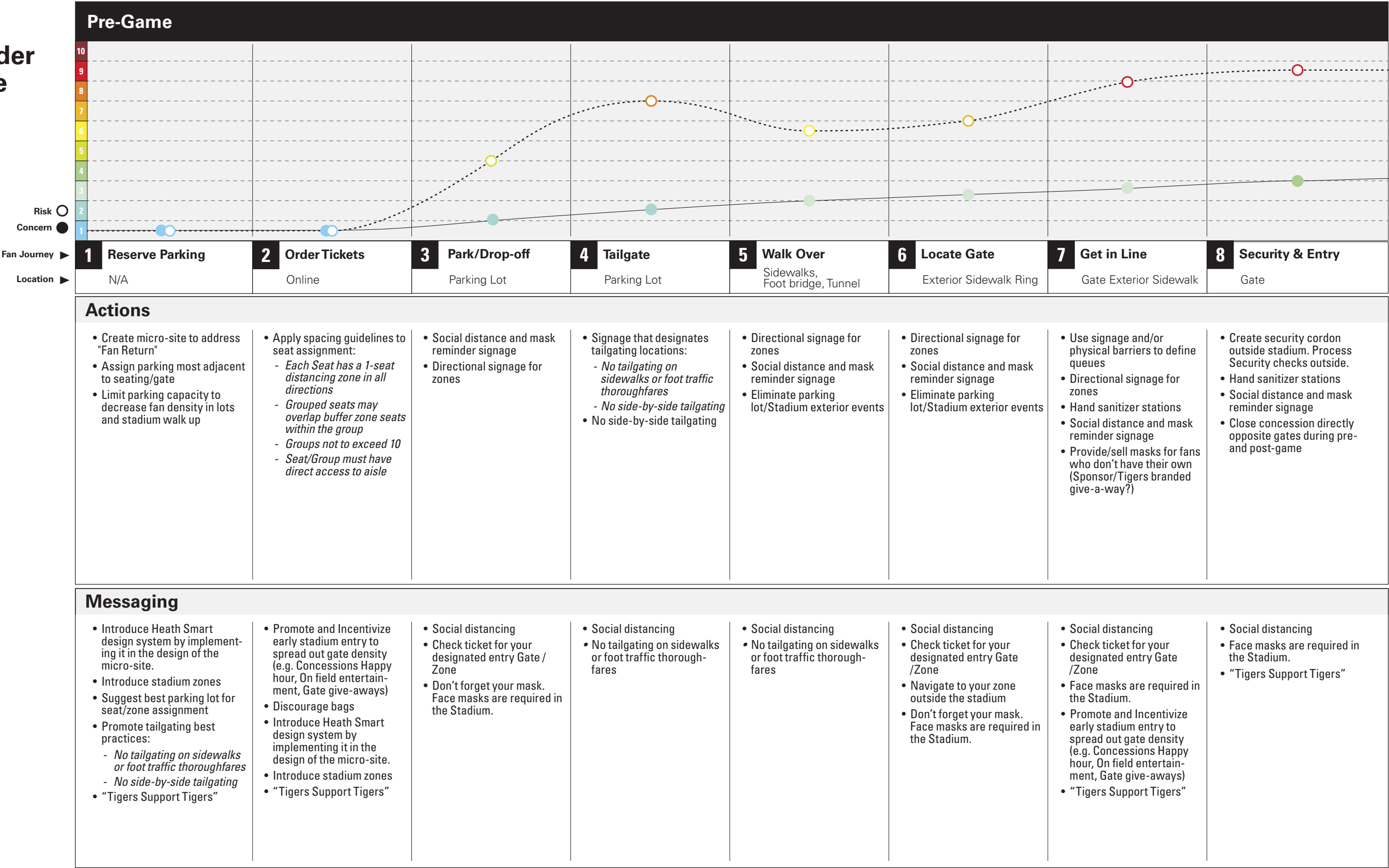


ADDITIONAL GROUPS

- Media
- Team and Stadium Staff
- Levy Employees



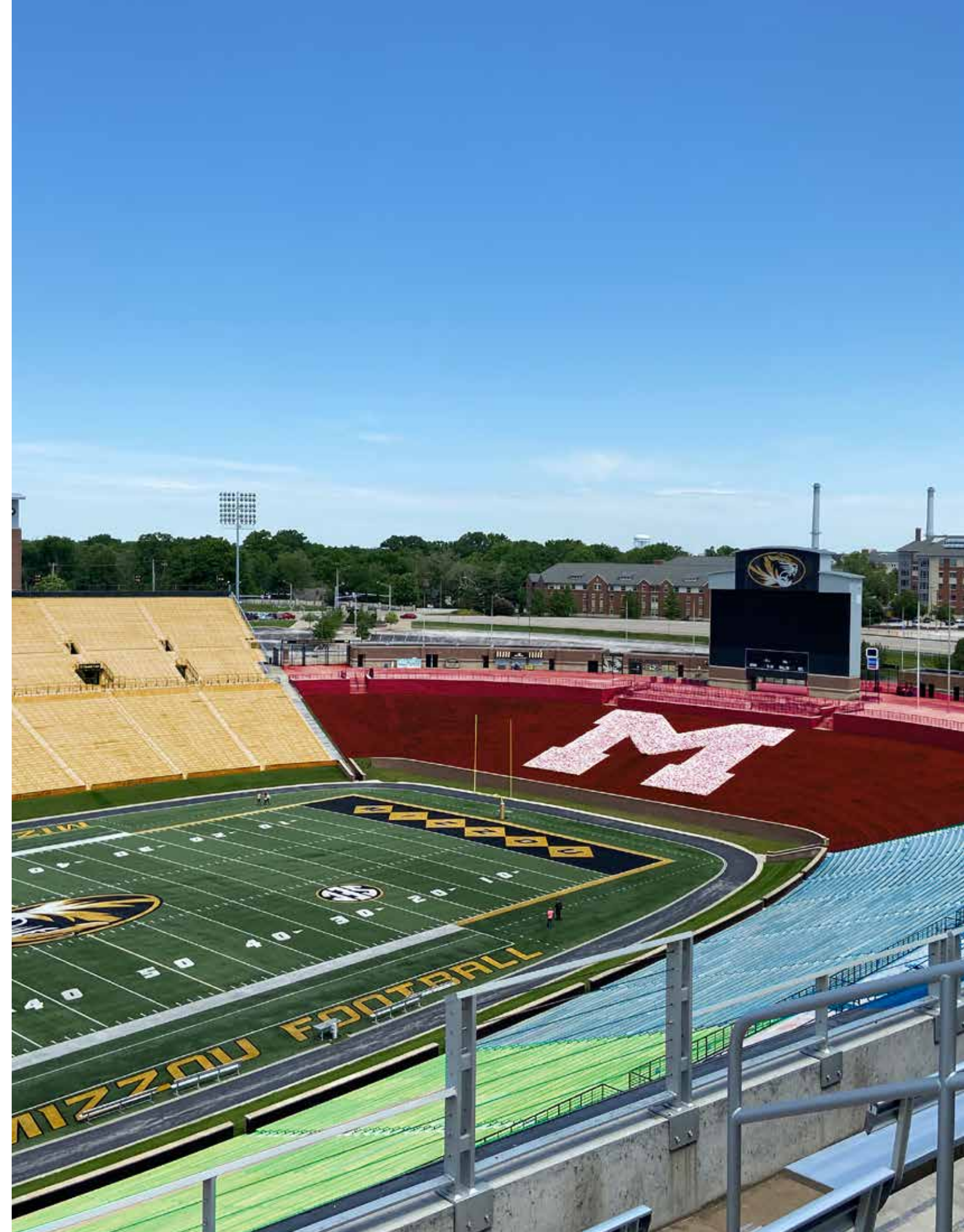
Season
Ticket Holder
Experience
Map



HEALTH SMART EXPERIENCE SOLUTIONS

SOLUTIONS | SEPARATION ZONES

- Isolate sections into groups with color-coded supplemental temporary signage and pre-game communications
- Maintain appropriate population density within each section through ticketing
- Prevent “clustering,” control traffic flow between seats and amenities, avoid “cross-contamination”
- Create a basis for contact tracing, should the need arise
- Require fans to enter the stadium through their assigned gate



Implementation Strategies

- UNIQUE SYSTEM SEPARATE FROM EXISTING WAYFINDING
- COLOR-CODED WITH CORRESPONDING ZONE IDENTIFICATION
- TEMPORARY, REMOVABLE, AND COST-EFFICIENT
- HIGHLY-LEGIBLE
- VISUALLY CONSISTENT

ZONE MARKERS

CONCOURSE LEVEL



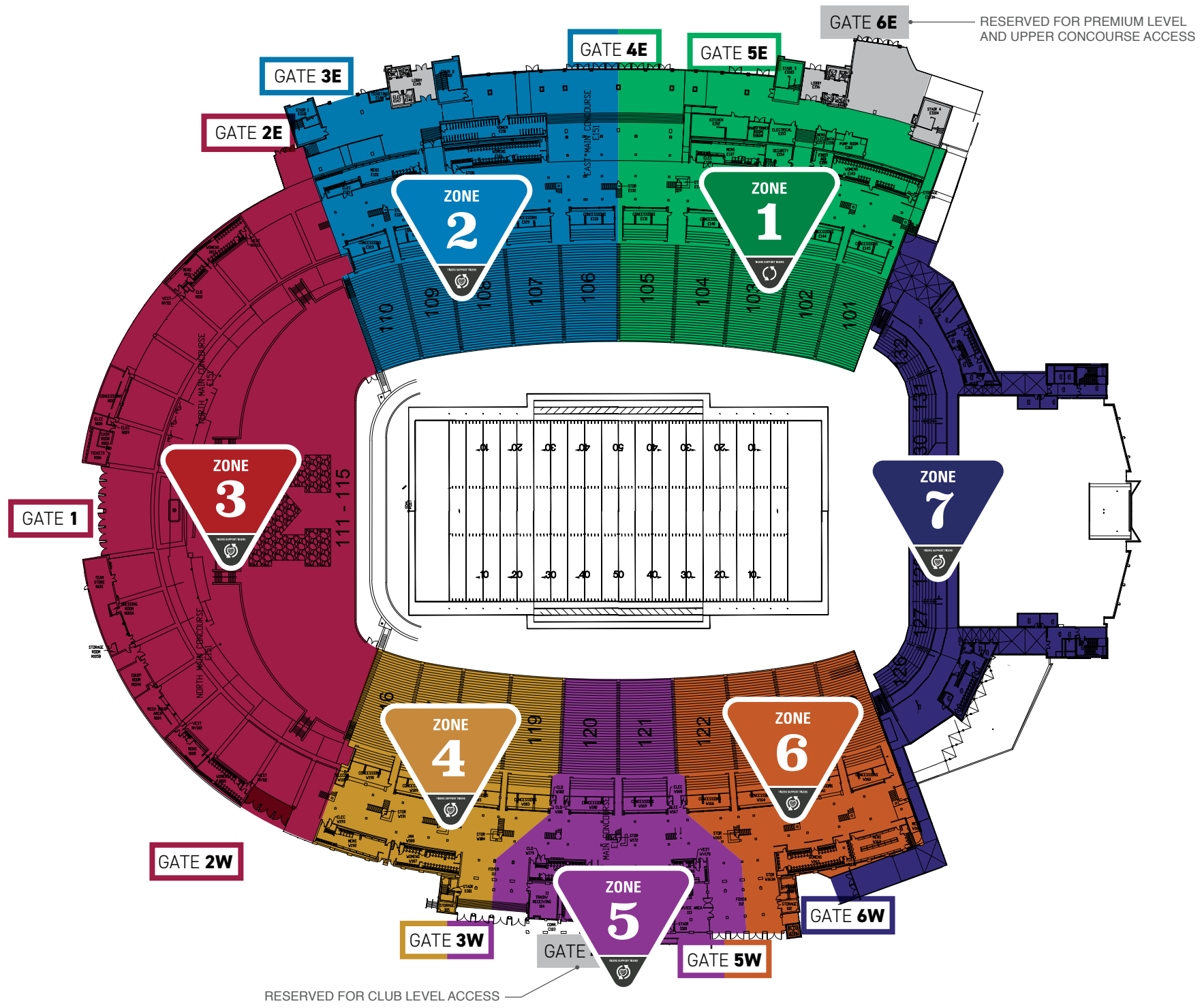
EAST SIDE PREMIUM



EAST SIDE UPPER CONCOURSE



HEALTH SMART EXPERIENCE AUDIT
SEPARATION ZONE MAP | CONCOURSE LEVEL OVERVIEW



SHORT TERM SOLUTIONS: **DIGITAL**

PRE-TOUR

WELCOME / LOBBY

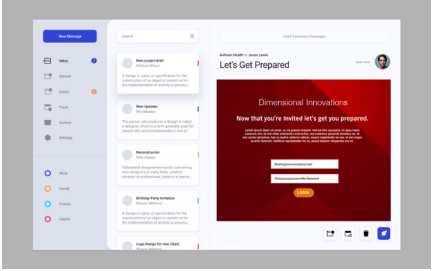
OPENING



KEYFRAMES

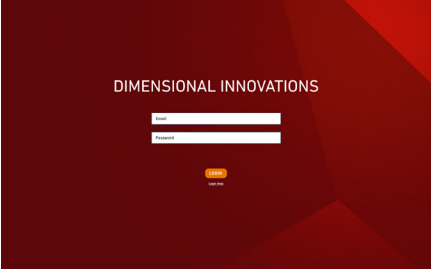
KEYFRAMES

KEYFRAMES



EMAIL INVITATION

Email from Partner to customers/clients with user name and password along with link to login.



LOGIN + LEARN

Guests can test out their passwords and login to watch instructional content and fill out the concierge survey.



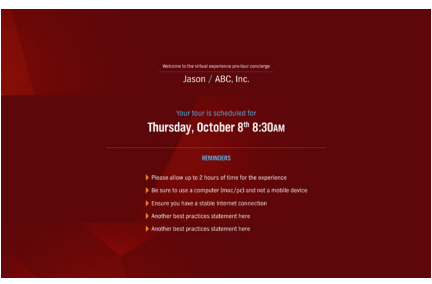
HOW TO / EDUCATION TEASER

Video tutorial that will educate guests on site functionality and let them know what to expect when they enter the experience.



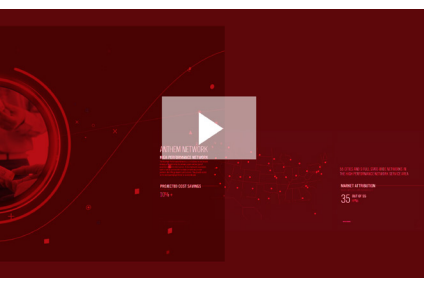
CONCIERGE Q&A / SURVEY

Guests answer 4-6 questions to better inform Partner on their preparedness for the scheduled virtual tour.



FINAL REMINDERS

The pre-tour concludes with a best practices and tour day/time reminder.



CLOSING VIDEO

A final video is played to create an impactful ending to the experience.



PRE-TOUR LOBBY

Waiting room space where guests can explore before the tour begins.



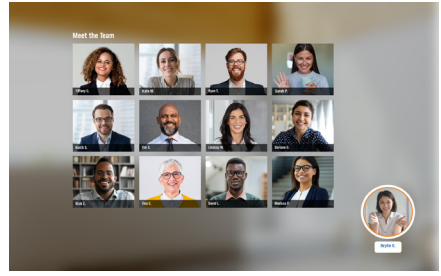
LOBBY EXPLORATION

Guests can click on 6-8 hot spots and learn more about Partner.



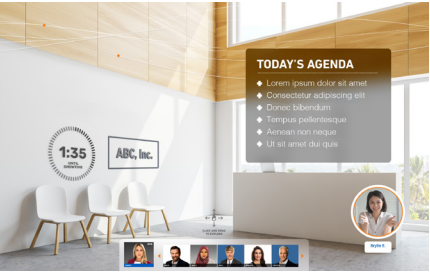
EXPLORE + LEARN

The docent provides a quick reminder on video chat functionality and prepares the group for the tour.



INTRODUCTION + BTS

A chance for the clients to meet the entire Partner team that will be with them throughout the tour.



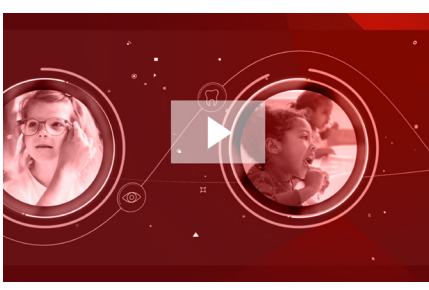
AGENDA

The sections of the tour are outlined.



FINAL REMINDERS

Pause for Q&A before entering the experience and ask for smiles to take group photo.



OPENING VIDEO

The docent triggers a transition from the lobby and then the opening video plays immediately after.



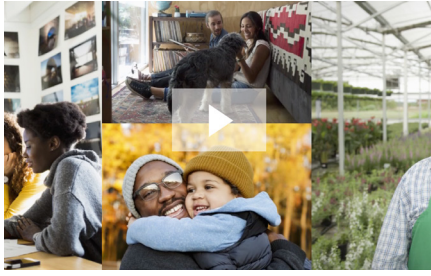
BLOOM OVERLAY GRID

Pause for Q&A before entering the next phase of the experience.



FOCUS ON THE FUTURE MENU

A unique parallax effect allows the user to construct the scene for the (3) videos by simply scrolling vertically. Guests can interact with the scroll feature before the docent hits play.



FOCUS ON THE FUTURE VIDEO

The docent activates the first piece of video content and it plays full-screen.



POST-VIDEO Q&A

Pause for Q&A before watching the next video or moving on in the experience.

PRE-TOUR

WELCOME / LOBBY

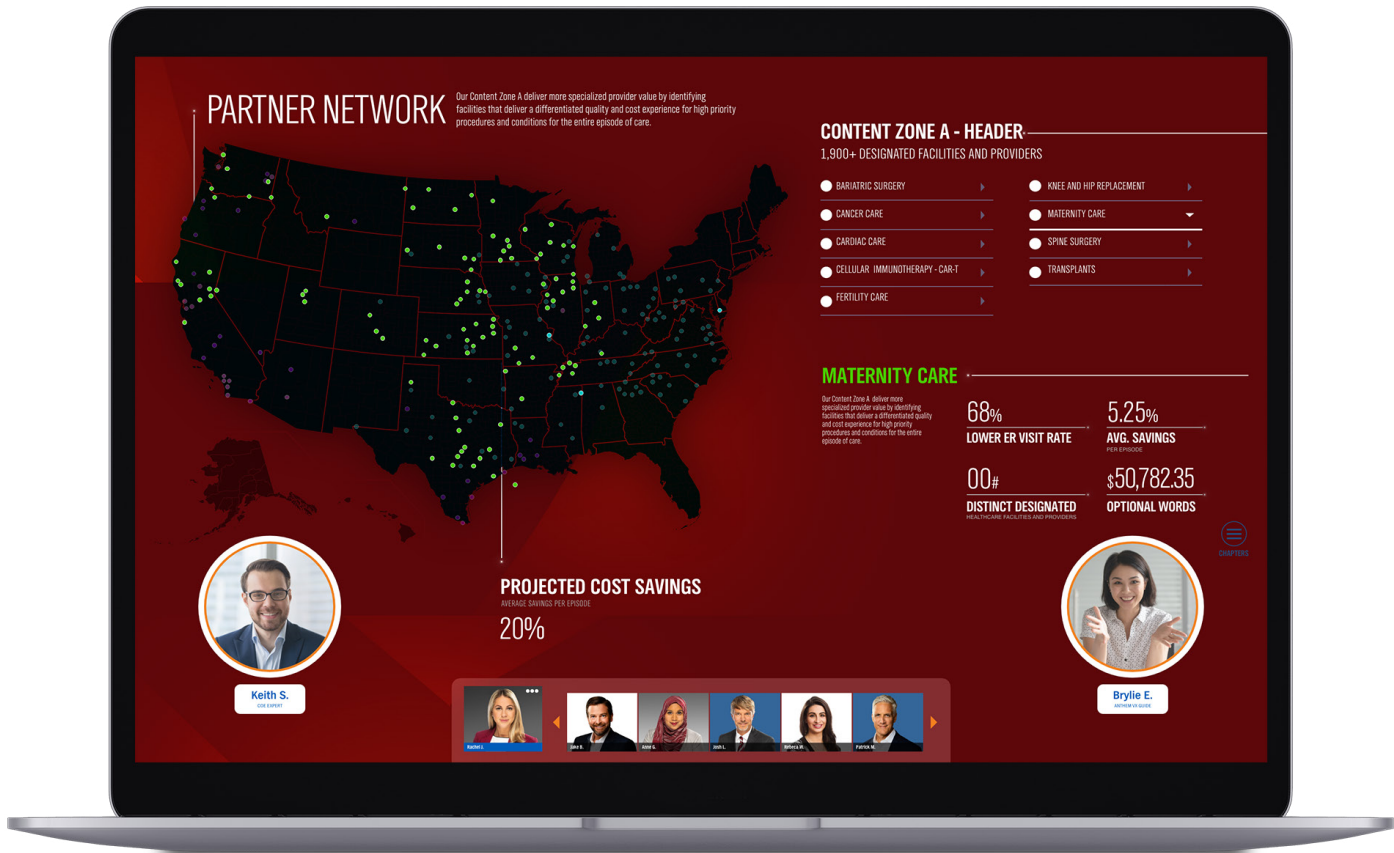
OPENING

BRIEFING CONTENT

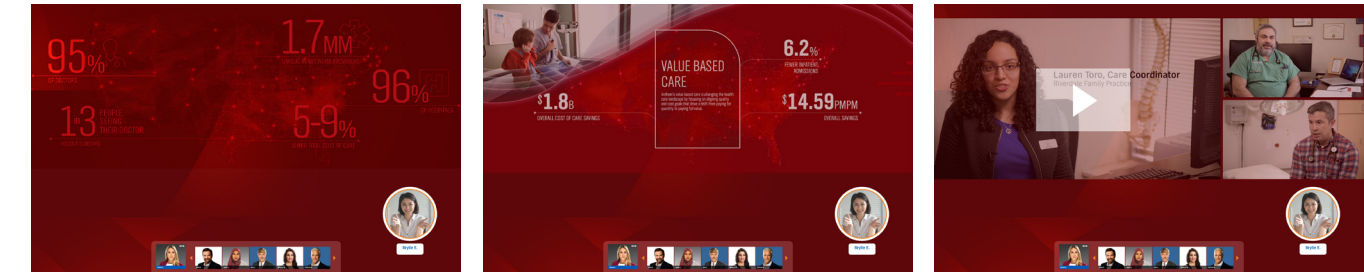
CLOSING

POST-TOUR/CONFERENCE ROOM

BRIEFING CONTENT



KEYFRAMES



POWER OF THE NETWORK

Dynamic data provides context about the power of the network.

FOCUSED CARE SERVICE

Several screens of statistics on focused care are demonstrated here.

TESTIMONIALS

Video examples of testimonials are played to reinforce the focused care information.



CONTENT ZONE A

Here the docent talks about centers of excellence and users can select a variety of categories and see coordinating locations appear on the map.

CASE STUDY

The docent pauses to set-up the case study and plays the full-screen video.

HIGH PERFORMANCE NETWORK

The high performance network is revealed on the map.

KEYFRAMES



DATA FIELD OPENING VISUAL

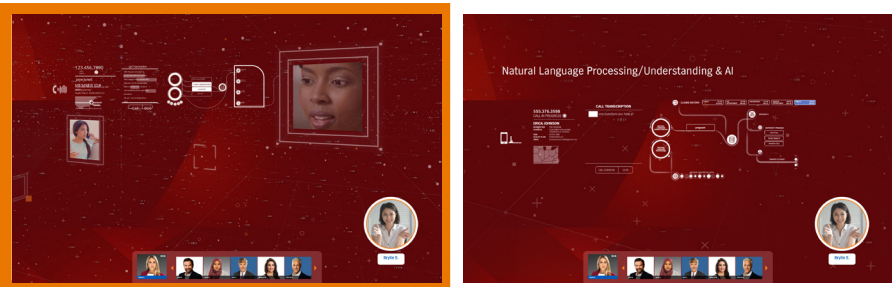
A 180° room of floating data fields can be explored with data trailing the mouse movement. Then the docent activates a transition to the first section.

CLIENT AT SCALE DATA

The first stop reveals data around Annual Inbound Calls, Service Calls perMonth, Ease of Resolutions, First Call Resolutions, and Average Handle Time.

CLIENT CUSTOMIZED DATA

Next client data is mirrored to the At Scale Data points after another animated transition.



CALL REENACTMENT VIDEO

Within the galaxy of data a pre-built animation reveals a video that reenacts a call made to Partner.

CALL REENACTMENT REVIEW

The docent pauses for questions and reviews the primary areas of the call reenactment video in more detail.



KEYFRAMES



180 ENVIRONMENT W/MEMBERS

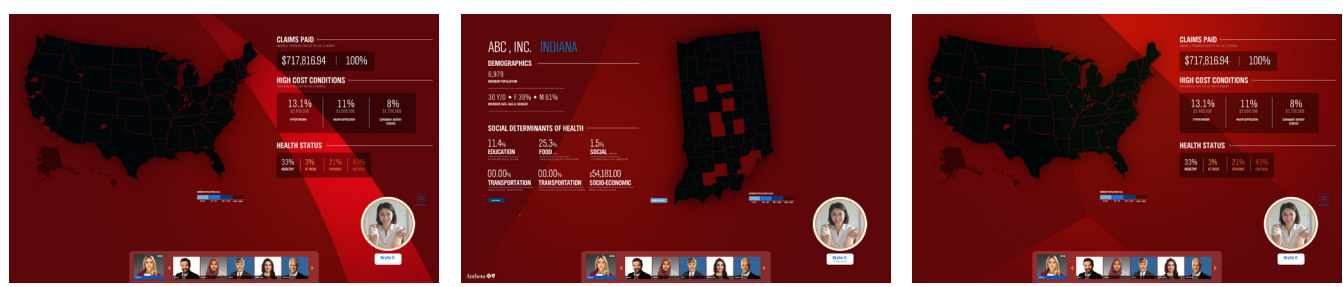
Guests can explore the city scene and discover hot spots representing different members.

USER JOURNEY VIDEOS

Once a member is activated, guests can watch video content while the docent tells the story of particular members.

INFOGRAPHICS

After watching the video guests return to the city scene to explore examples of data.



INTERACTIVE MAP

The experience starts with a national map where guests can see state level data.

INTERACTIVE MAP (STATE)

The map transitions to focus on single states, allowing guests access to county level data.

INTERACTIVE MAP (STATE)

Back on the national level guests are now given the opportunity to explore the map and interact with the data.

PRE-TOUR

WELCOME / LOBBY

OPENING

BRIEFING CONTENT

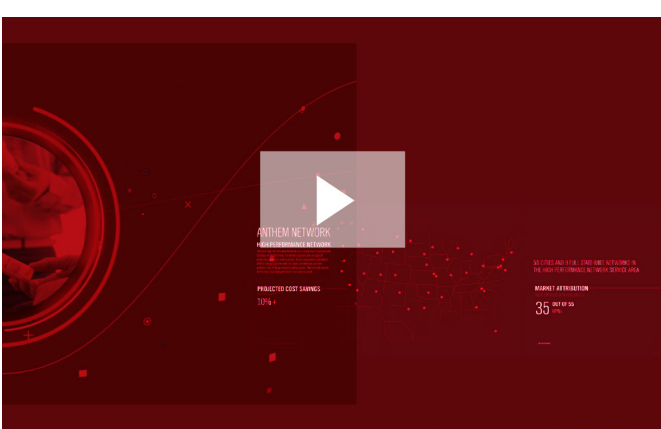
CLOSING

POST-TOUR/CONFERENCE ROOM

CLOSING

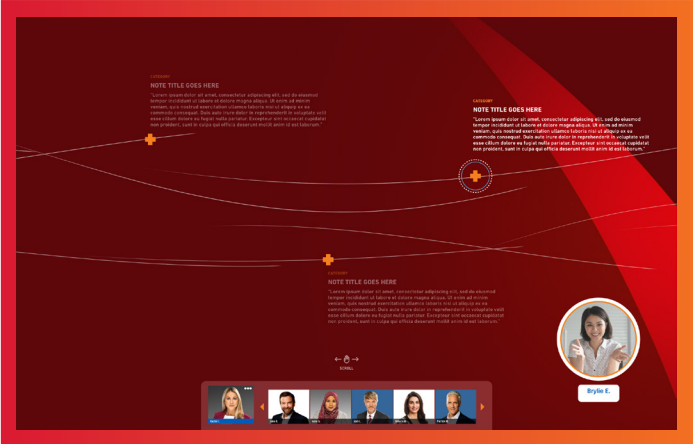


KEYFRAMES



CLOSING VIDEO

A final video is played to create an impactful ending to the experience.



INSIGHTS / NOTES REVIEW

Throughout the tour an expert will be taking notes and the group will be able to review them with a unique horizontal scrolling timeline. They can also be exported as a printable version.

POST-TOUR / CONFERENCE ROOM



KEYFRAMES



THANK YOU LOBBY

Guests return to the lobby for a genuine thank you and discussion of next steps. This includes a WebX link to continue the conversation.

PRE-TOUR

WELCOME / LOBBY

OPENING

BRIEFING CONTENT

CLOSING

POST-TOUR / CONFERENCE ROOM



MINNESOTA VIKINGS MUSEUM VR EXPERIENCE



CONNECTICUT CHILDREN'S MEDICAL CENTER INFUSION ROOM
INTERACTIVE GAME



EVEL KNieVEL MUSEUM VR JUMP SIMULATION

MIXED REALITY

Creating digital, visual extensions of an existing reality can help contextualize ideas and bring a new level of depth to our experiences. Under the mixed reality (XR) umbrella, augmented reality (AR) and virtual reality (VR) technologies offer a new way for users to interact with content.



MUSEUM AT PRAIRIEFIRE DINOSAUR AR EXPERIENCE



CABELA'S TRAILHEAD KIOSK VR EXPERIENCE



MINNESOTA VIKINGS VIKINGS VOYAGE XR BATTLE ARMOR INTERACTIVE



UNITED STATES NAVAL ACADEMY

IMMERSIVE MEDIA

Immersive Media, true to its name, allows your audience to be fully immersed in your brand—experiencing it in a way that allows them to participate and form a closer relationship to the brand. Merging large-scale visuals with a physical space can create environments that are visually remarkable, unique and inclusive.



UNITED STATES NAVAL ACADEMY



DIMENSIONAL INNOVATIONS IMMERSIVE THEATER

SHORT TERM SOLUTIONS: UNDERSTANDING BEHAVIOR CHANGES

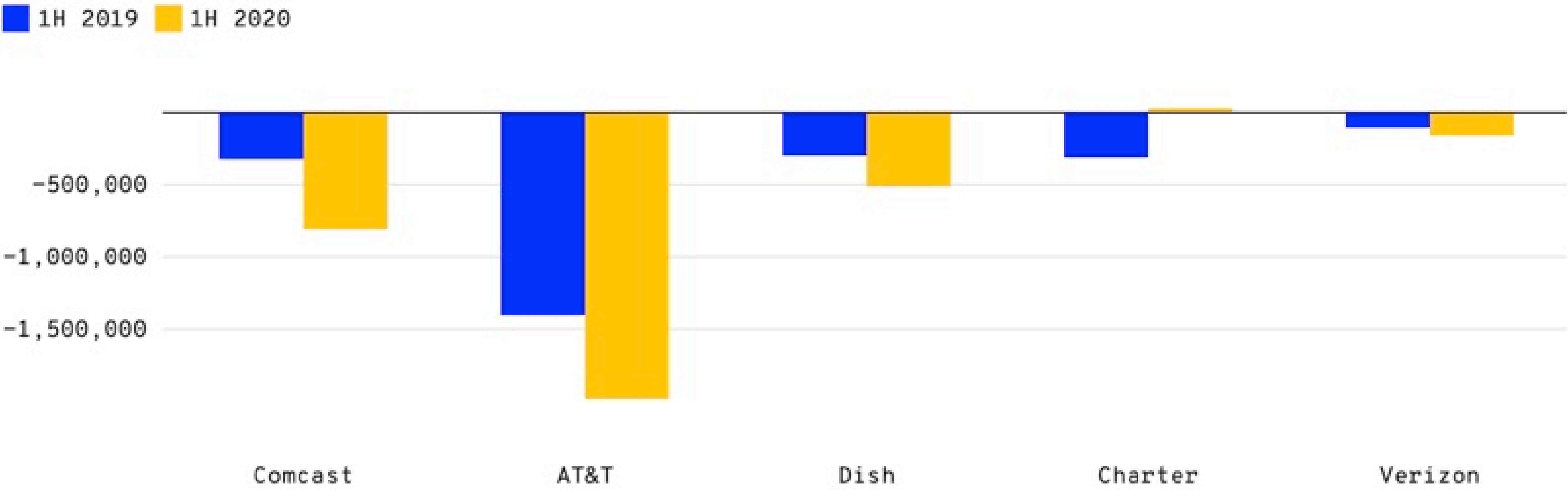
Spend on more discretionary items over the next four weeks has yet to pick up

Net spending intent by country, percentage

NET SPENDING INTENT															
<div> <div></div> <div>Lowest</div> <div>Highest</div> </div>															
	United States	Canada	Mexico	United Kingdom	Ireland	Germany	France	Italy	Spain	Netherlands	China	India	Japan	South Korea	Australia
Less discretionary															
Everyday household goods	23	18	47	17	26	11	14	24	22	21	43	52	1	19	14
Groceries	37	34	52	26	32	19	21	28	26	27	26	55	7	33	19
Utilities	16	5	30	12	11	3	-1	0	8	7	30	34	-2	2	24
Medicines	10	5	28	3	6	8	3	9	9	13	5	47	-2	9	3
Home internet/mobile phone	10	7	26	5	9	11	8	1	13	17	28	46	3	12	14
Health care	7	0	20	-2	-4	9	6	1	-3	10	28	51	-2	0	1
Housing	5	0	-5	3	1	5	-4	0	-3	13	11	8	-6	-2	2
More discretionary															
Alcohol	-2	-7	-34	-5	-10	-4	-27	-33	-20	-2	-9	-16	-15	-17	-3
Books	-3	-20	-23	-12	-11	8	-8	-5	-7	2	18	15	-9	-10	-15
Cable TV	8	0	5	-1	-6	6	-8	-12	-2	8	17	31	-14	6	-2
Clothing/apparel/footwear	-18	-34	-24	-29	-29	-7	-17	-16	-20	-3	25	-6	-27	-13	-17
Electronics	-14	-29	-32	-25	-28	-9	-23	-18	-18	-3	12	0	-15	-25	-21
Entertainment	-7	-11	7	-4	-11	-6	-15	-8	-8	5	16	29	-16	10	-2
Fuel and motor oil for my automobile	-25	-39	-19	-45	-44	-15	-20	-21	-25	-21	17	-4	-20	13	-23
Furnishings	-21	-37	-51	-32	-42	-11	-38	-46	-41	-12	-5	-18	-31	-40	-27
Restaurants/takeout food	-6	-26	-3	-39	-39	-11	-36	-23	-23	-8	7	-24	-20	-6	-14

Cord cutting under COVID

TV services subscriber defections during the first half of 2020, compared to the same time last year.



TRENDS

> Opportunities:

- Local
- No travel/vacation
- Digital Rights


> Concerns:

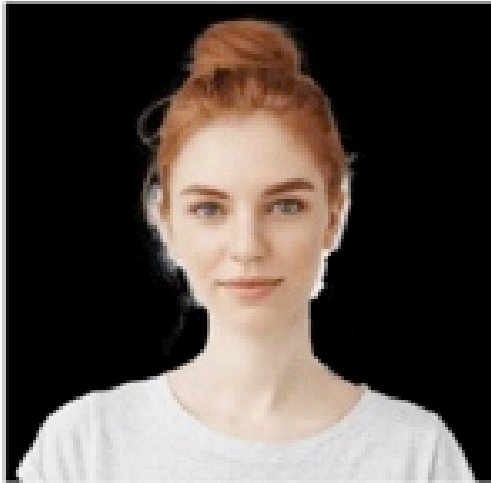
- Jobs and Paychecks
- Health Safety

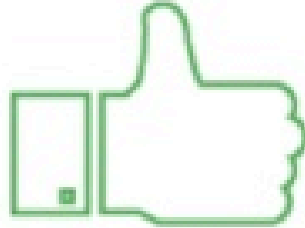
NEAR TERM SOLUTIONS:
TESTING A INET A ING

8:38

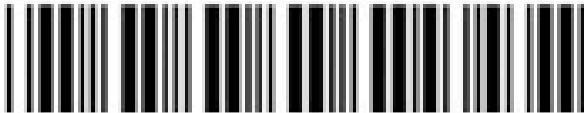
COVOPERATE

**BLACK & VEATCH**
COVOPERATE Boarding Pass




APPROVED

Green Pass Recommended Actions



00001

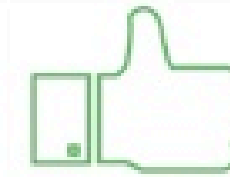
Contact Name	Jane Smith
Contact Phone	936-666-8003
Contact Email Address	SmithJ@bv.com
Pass Issue Date	5/28/2020 20:37:42
Pass Expires On	5/29/2020 8:37:42
Time Remaining	11 Hours 59 Minutes

Valid

III

○

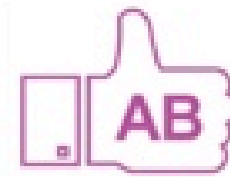
<



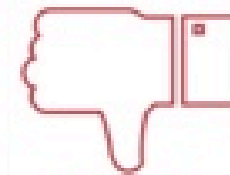
APPROVED



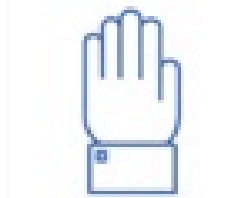
APPROVED
PPE REQUIRED



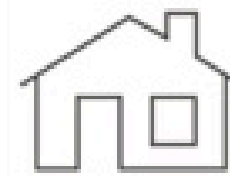
APPROVED
ANTIBODIES +



DENIED



PENDING



STAY HOME

FUNCTION // COMPONENTS

What's the colloquial short hand?

The units identity needs to be approachable and positive. It should capture the motivations of health and camaraderie.

SAFE
TOGETHER

SAFE
TOGETHER
QUICK SCREEN

SAFE
TOGETHER
CLINIC

SAFE
TOGETHER
SCREENING CENTER

Language

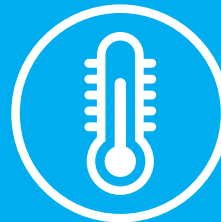
Simple, short statements and clear graphic elements define experience expectations. Language is approachable and playful, encouraging a positive impression. The straightforward approach marries the emphases of efficiency and professionalism.

**QUICK SCREEN****Face mask on**

Need a mask? We've got you covered.

**Symptom check**

Answer two simple questions

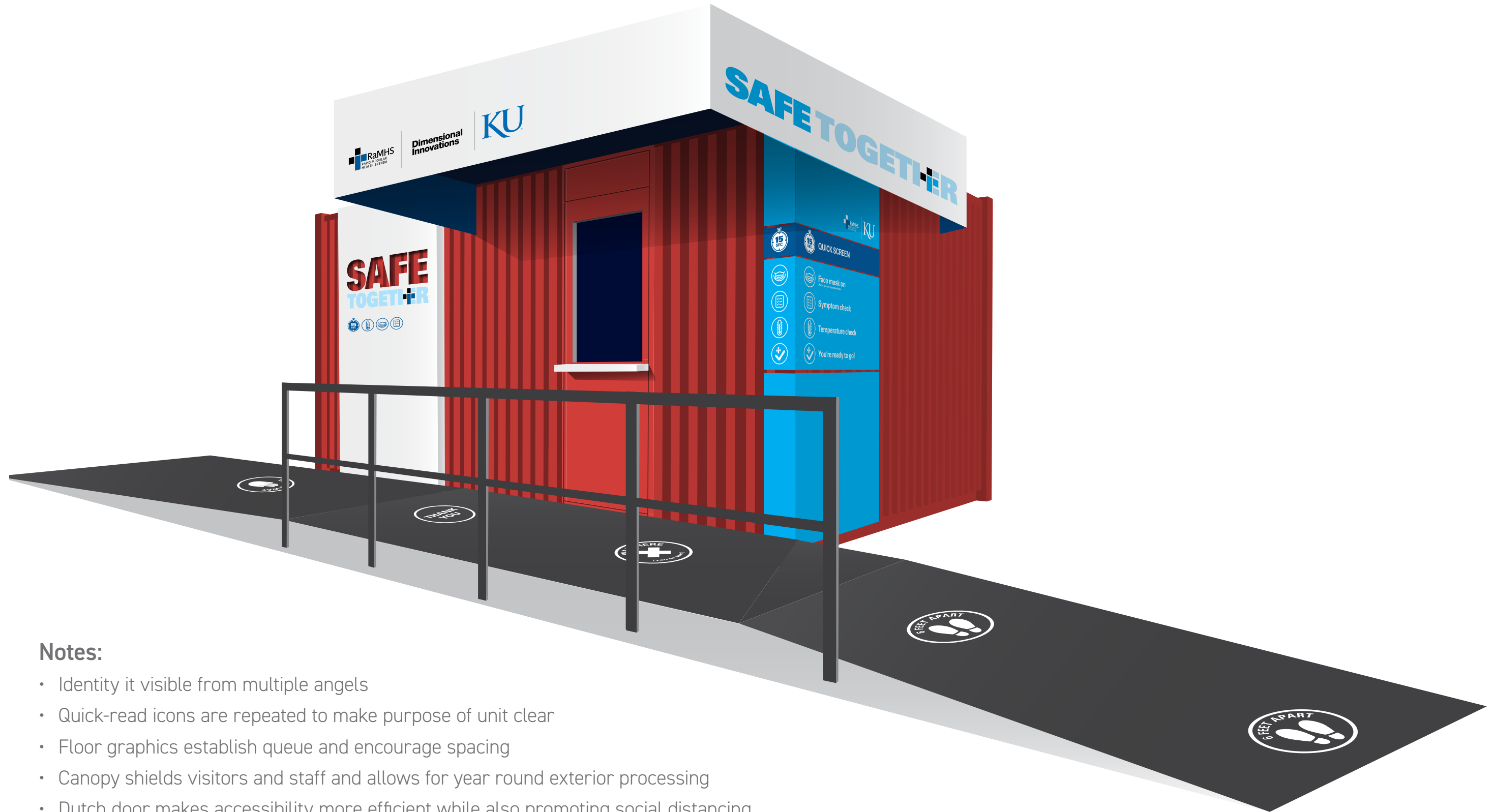
**Temperature check**

Touch free

**You're ready to go!**

Take a sticker and start your day

FUNCTION // IN PRACTICE

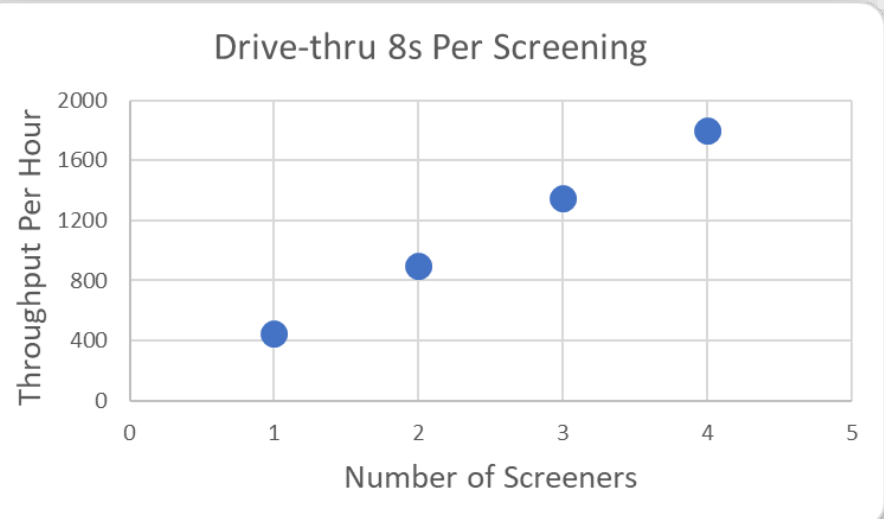
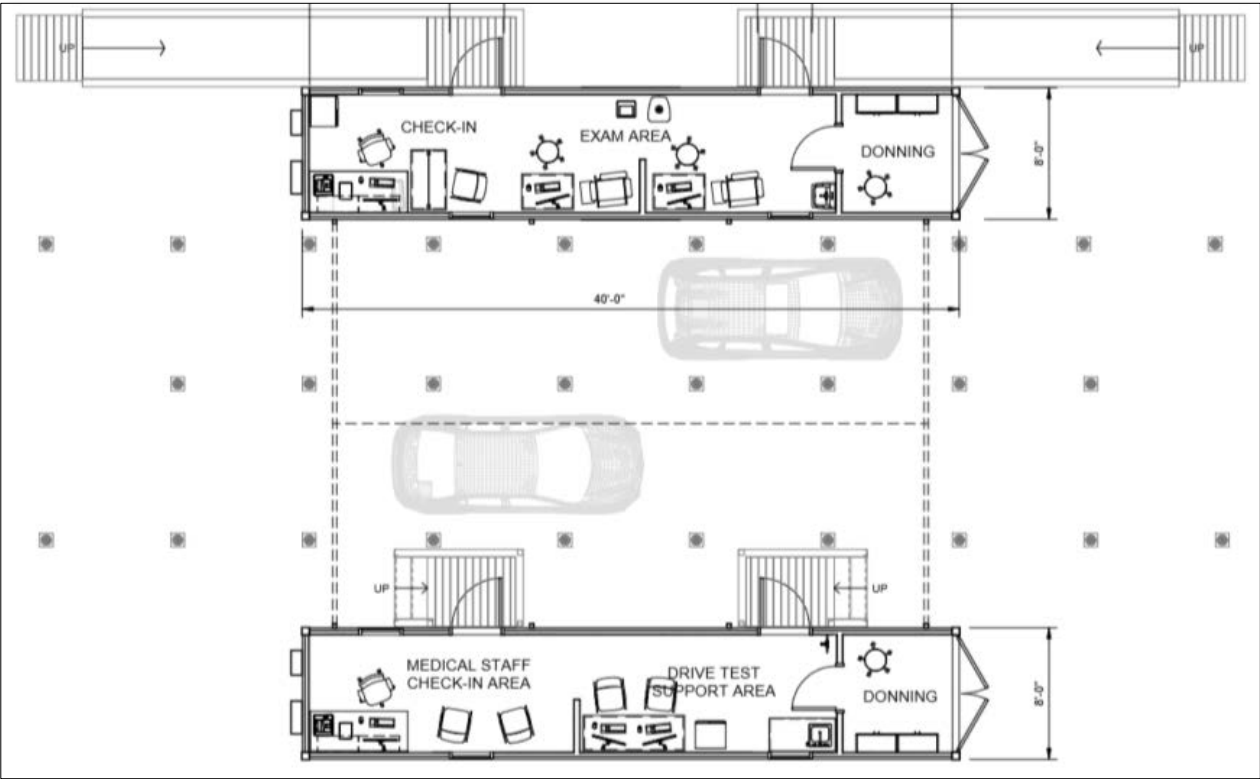


Notes:

- Identity is visible from multiple angles
- Quick-read icons are repeated to make purpose of unit clear
- Floor graphics establish queue and encourage spacing
- Canopy shields visitors and staff and allows for year round exterior processing
- Dutch door makes accessibility more efficient while also promoting social distancing



RaMHS Site Access Combined Walk-up / Drive-thru Array



Flexible configurations to allow for multi-site accommodations.

LONG TERM SOLUTIONS:

T O Y L E S A E A

PARTICIPATES

SPONSORS

FLEXIBILITY

PERFORMS







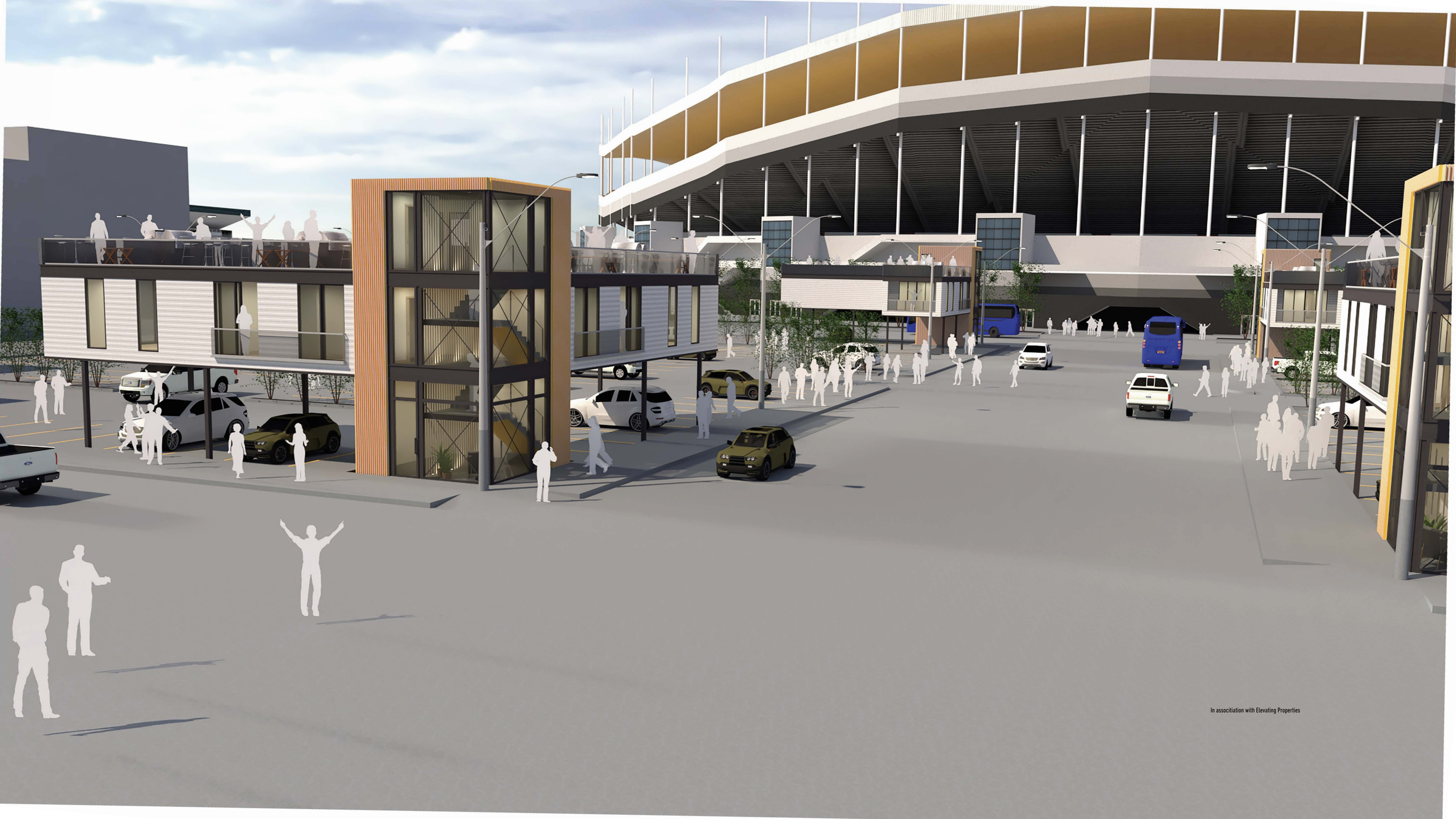








In association with Elevating Properties



HOW WE CAN HELP



SOLUTIONS

PLANNING

FLEXIBILITY



DI

DO YOU WANT HELP? CONTACT ME:

DREW BERST

DBERST@DIMIN.COM | 913-991-0361

