boldyn NETWORKS

THE JOY DIVIDEND

Stronger connection. Enhanced experience. Greater returns.



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FOREWORD

We've all experienced it: you're in the middle of a crowd, the signal drops, and suddenly you've lost your friends, your bearings, and the moment. In the best venues and spaces, it's a completely different story. You feel connected, not just to your network but to the people around you and to the experience itself.

For years, we've talked about connectivity in technical terms. These measures still matter, but they don't tell the whole story anymore. Today, connectivity is as much about how people feel in a space. Whether it's a last-minute meetup, a goal or surprise song captured and shared instantly, a drink arriving at your seat, or a reassuring message from the babysitter – seamless connectivity enables joyful experiences.

That's why I'm pleased to introduce **The Joy Dividend**. This study takes a first-of-its-kind look into the emotional and commercial impact of seamless mobile connectivity in high footfall spaces.

What we found is clear. When connectivity is strong, people stay longer, spend more, return more often, and share their experiences more widely. Venues feel the benefits when it comes to loyalty, partnership and long-term value. And for mobile network operators, connectivity in these spaces offers one of the most immediate opportunities to stand out as experience enablers.

This is a strategic challenge as well as a technical one. As digital and physical experiences continue to merge, expectations are rising fast. Visitors want effortless connectivity everywhere they go, and venues need networks that can support smarter systems and richer experiences. The organisations that get ahead of this shift will create spaces people genuinely want to return to.

We hope that this study sparks new conversations around connectivity, as well as new opportunities. Because if it shows anything, it's that the future of connectivity is about more than signal strength; it's about the moments it makes possible.

Brendan O'Reilly
CEO Europe & Asia Boldyn Networks

> ***The Joy Dividend*** **takes a first-of-its-kind look into the emotional and commercial impact of seamless mobile connectivity in high footfall spaces.**

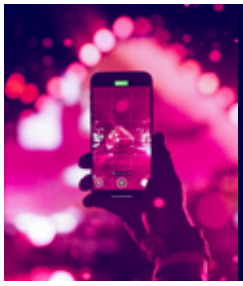


EXECUTIVE SUMMARY

Seamless mobile connectivity in venues and spaces delivers more than operational efficiency. It creates an emotional uplift for visitors that translates directly into commercial value. We call this the **Joy Dividend.**

Connectivity has become emotional infrastructure

Connectivity has shifted from a supporting service to something that shapes how people feel, engage and remember experiences.



82%

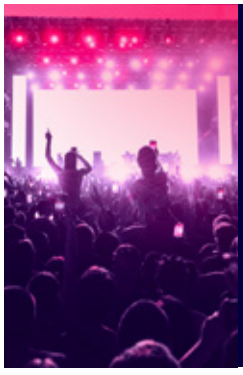
of visitors say **seamless connectivity** is very important to their experience

53%

of visitors say moments of joy feel **twice as special** when they're able to share them[1]

Joyful experiences drive measurable returns

Visitors who feel connected stay longer, spend more, return more often and share their experiences more widely.



90%

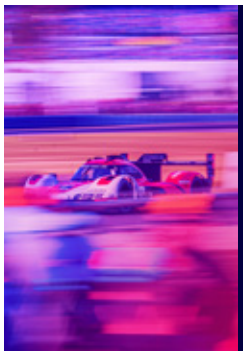
of venue leaders say seamless connectivity has a significant positive impact on **customer loyalty** and **brand trust**

£3.5m

67% of visitors would pay more for guaranteed seamless connectivity – a median amount of £3.50. This could unlock an average of **£3.5 mln in additional ticket value** per large venue each year

Expectations evolve faster than strategies

As physical and digital experiences continue to merge, venues need robust connectivity strategies that span infrastructure, operations, and end-to-end visitor experience.



81%

of venue leaders say seamless mobile connectivity is very important in ensuring their venue can **fully realise the benefits of smart systems**

42%

expect to achieve **'leading' connectivity status by 2030**, but only 24% have a proactive, strategic roadmap aligned with future tech and visitor needs

MNOs are overlooking a major growth opportunity

For mobile network operators, these high-footfall spaces are where customer perception is shaped.



72%

of visitors **would consider switching mobile network** provider due to poor connectivity experiences at a venue or space

1/2

but, just half of leaders within MNOs identify **uninterrupted, seamless venue/space connectivity** as an important area of their overall network strategy

Connectivity is now a strategic lever for growth. The venues and networks that deliver next-generation joy will earn higher loyalty, greater spend, stronger partnerships and a lasting competitive edge.

Keep reading for insights you can act on.

The story from over 1,000 voices: Data gathered from executives in venues and spaces, visitors (including superfans), artists, and MNOs reveals what connectivity really means for experience and long-term value.

A clear business case: You'll understand where stronger connectivity boosts return, and where poor performance quietly erodes loyalty, brand perception and future growth.

Your place in the market and steps to success: Book a guided **Joy Dividend benchmarking assessment** to assess how your connectivity strategy stacks up against UK peers and where you can unlock the greatest gains.

01 MOMENTS OF JOY



Mobile connectivity has shifted roles from a supporting service to a form of emotional infrastructure – something that shapes how we feel, behave and remember experiences.

When connectivity fails, the emotional cost is immediate: frustration, anxiety and, often, exclusion.

But while poor connectivity can pull people out of the moment, our research also found that when everything works seamlessly, they become more present and joyful experiences are heightened. The majority of visitors (82%) rate seamless mobile connectivity as very or extremely important to their experience when visiting venues or spaces.



ARTIST PERSPECTIVE

[Connectivity is] an invisible medium that nobody is aware of when it works well.

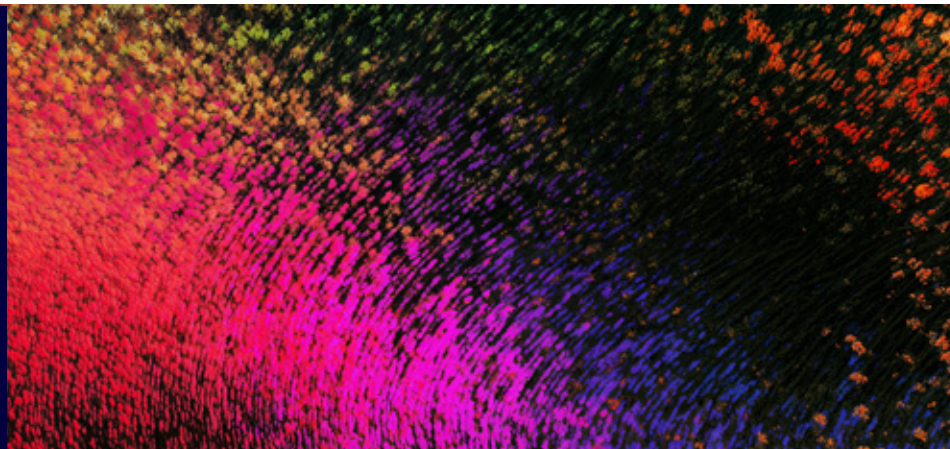
[Connectivity] does allow you to be more intimately involved with a bigger number of people.

Effortless by default

In a world built on instant access, being connected is just part of the deal. Nine in 10 venue leaders agree that visitors expect seamless digital experiences. And seven in 10 visitors (69%) agree that connectivity is no longer a luxury, but a basic expectation.

However, many visitors have lower expectations for high-footfall spaces. Less than half (43%) expect the same level of mobile performance in busy venues and spaces as they do at home.

7 in 10 visitors agree that connectivity is no longer a luxury, but a basic expectation



SUPERFAN SPOTLIGHT



I just want to be able to use my phone at the venue the same way I use it anywhere else [...] I don't expect anything over the top, just a smooth, reliable connection that lets me share the experience while it's still happening.

Connectivity counts

For many fans, weak signal doesn't just disrupt the moment: over three-quarters of visitors (77%) say poor connectivity at events ruins their experience. And 73% say they can't enjoy an event if their phone signal doesn't work.[1]



ARTIST PERSPECTIVE

"If the tech infrastructure isn't there and the connectivity isn't there, everything starts to fall apart really quickly.

Having good connectivity [is important], because, at the end of the day, a performance venue is still a workplace for people.

On the other hand, the majority of venue leaders (86%) believe seamless mobile connectivity has a positive impact on customer satisfaction. In fact, a similar proportion (85%) believe mobile connectivity is now as critical to visitor satisfaction as physical amenities, such as seating, signage or cleanliness. And 84% believe that mobile connectivity impacts how safe, relaxed and included visitors feel in their space.

But it goes beyond convenience and security. Our research reveals that the most joyful human experiences are increasingly amplified through connectivity.

58%

of visitors say sharing moments/experiences makes them **feel more meaningful**

58%

say strong connectivity strengthens the sense of **collective excitement** in crowds

53%

say moments of joy feel **twice as special** when they're able to share them[1]

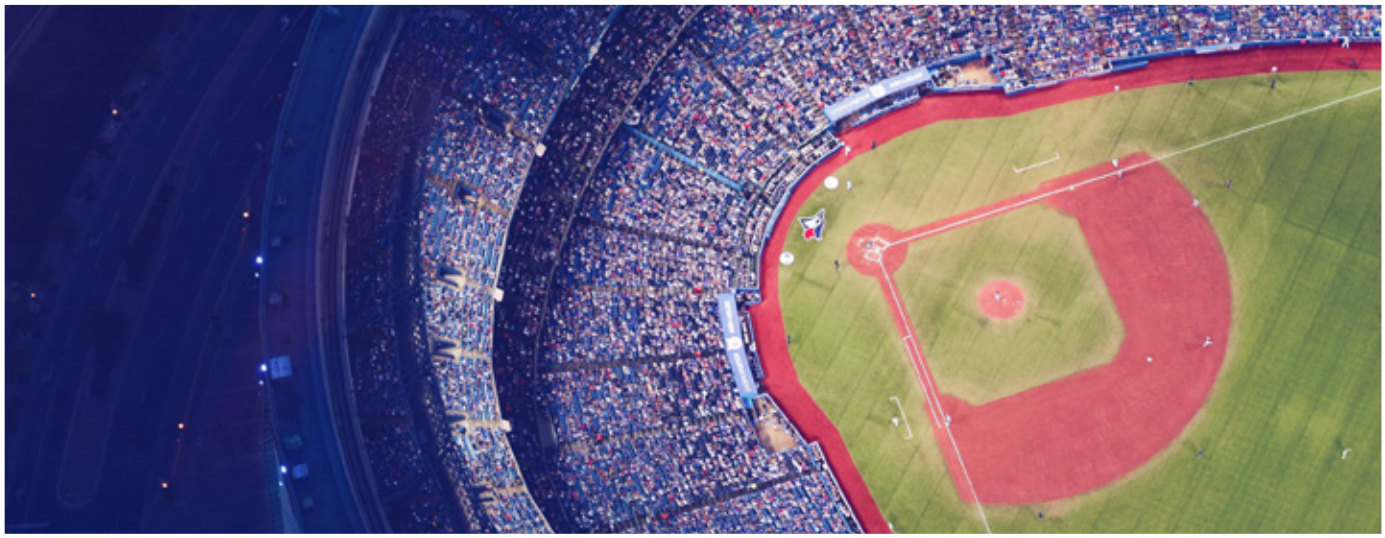
SUPERFAN SPOTLIGHT



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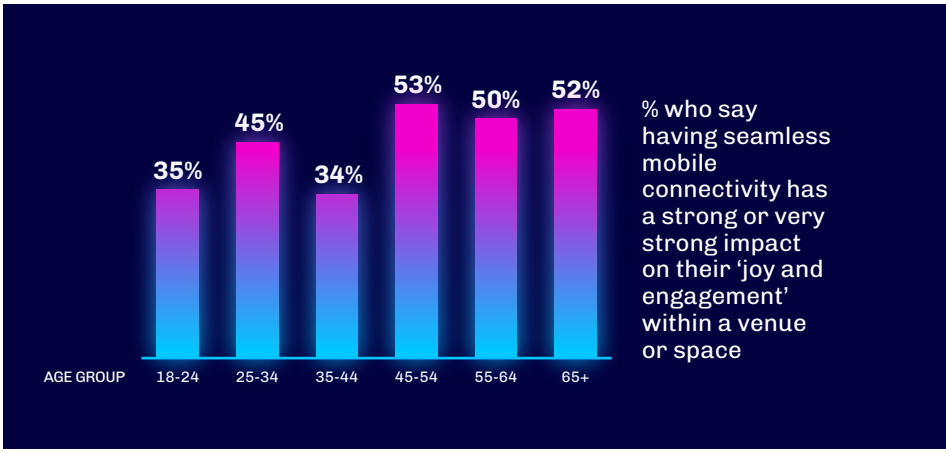
When I go to these events, I usually expect the connection to be bad, just because of how many people attend. Since I go in with that expectation, I’m not disappointed when it actually is.

A reliable connection means both convenience and security.



An intergenerational story

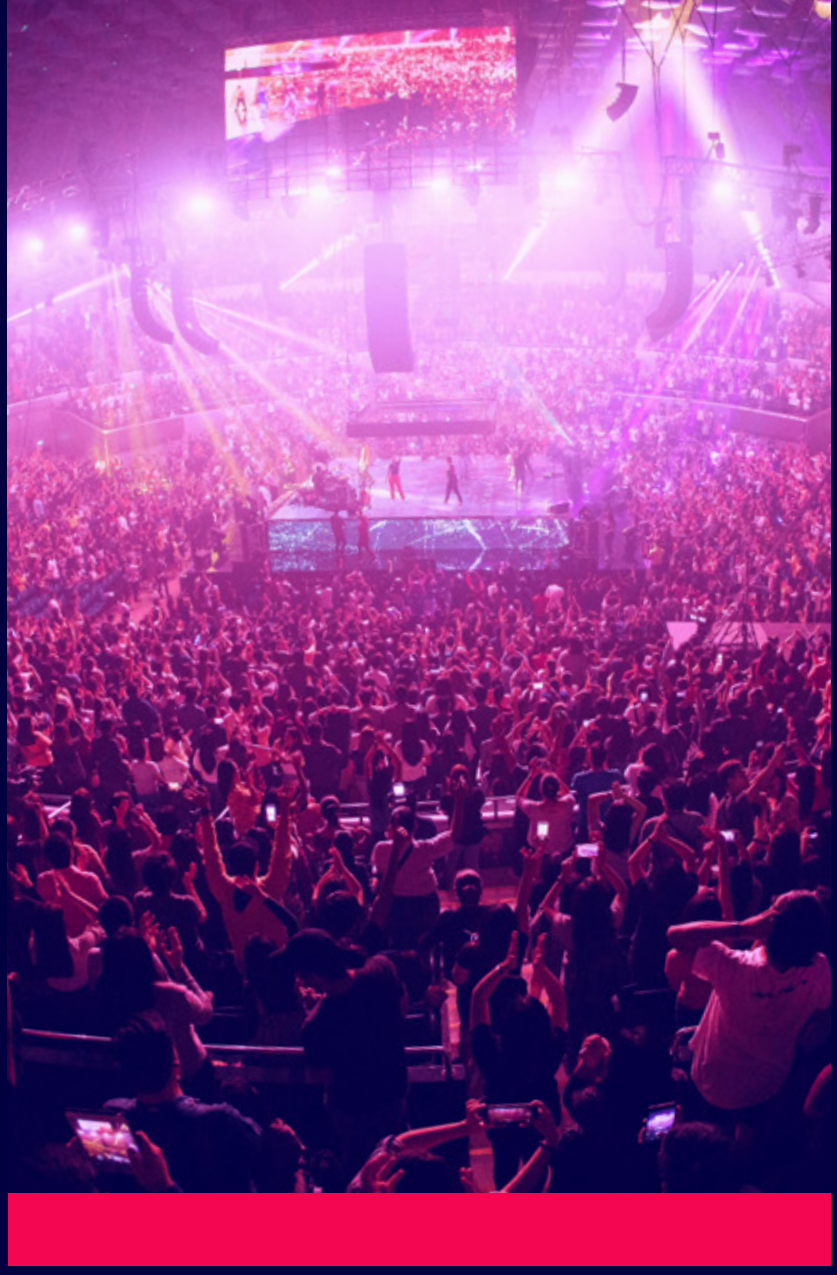
Perhaps surprisingly, it's not the digital natives who get the greatest boost from connectivity. Those aged 45 years and over are most likely to say that having seamless mobile connectivity has a strong or very strong impact on their 'joy and engagement' within a venue or space – helping them feel more present, relaxed, safe and uplifted during the experience.



Emotion is social. When others see and reflect what we're feeling, it validates our experience and gives it more significance. And that validation can heighten the emotion in ways that don't happen when we are on our own. Sharing moments with other people who lived them, or fellow fans, can be a form of 'savouring' – keeping those positive feelings alive for longer after the event.

John Drury
Professor of Social Psychology at University of Sussex

SUPERFAN SPOTLIGHT



Using my phone is a big part of the experience for me now. It helps me feel connected, helps me capture the memories, and makes the whole thing feel complete.

For me, true joy is when connectivity is fully woven into the experience – not as an afterthought, but as something essential to how we engage as fans.

02 THE INVISIBLE EDGE



When people associate a space with safe, effortless and joyful experiences, they behave differently. They stay longer, spend more and return more often, sharing their positive experiences.

For MNOs, investment in this area delivers measurable gains in customer loyalty and opens the door to premium partnerships.

Together, these outcomes create a compounding ROI that grows with every interaction.

Ticket value uplift

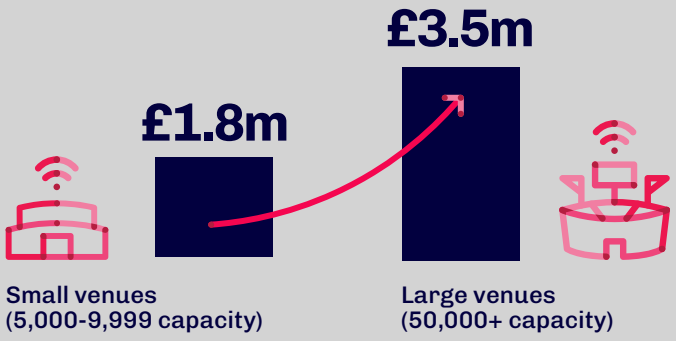
67%

of visitors would be willing to pay mor e for a ticketed event or service at their favourite venue or space if it guaranteed seamless connectivity – a **median average amount of £3.50**.

£3.5m

This means that seamless mobile connectivity could unlock an average **increase of £3.5 million in ticket value**, per venue, per year, across large venues and spaces.

Average annual increase in ticket value, per venue:





Visitor behaviour

47%

of visitors are **more likely to spend money** when digital services work smoothly.

52%

say seamless mobile connectivity has a strong or very strong impact on their **willingness to share positive experiences** publicly.

SUPERFAN SPOTLIGHT



“

The quality of connectivity definitely shows how much a venue values its fans. If they’re willing to invest in better connectivity, it shows they’re not just there for the money they actually care about the fan experience. The venues that don’t make that effort will eventually get left behind, because fans notice these things, and they won’t stick around forever.

Return on connectivity

According to venue leaders, seamless mobile connectivity has a significant positive impact on the following aspects of their organisation:

90%

Customer loyalty and brand trust

(customer's likelihood to return)

83%

Profitability

(such as increased secondary spend or reduced operational costs)

80%

Reputation

(influence on overall reputation, image and visitor perception)

76%

Efficiency

(reduction in wasted time, duplicated effort or system-related delays)

72%

Employee wellbeing

(reducing stress, minimising frustration and freeing up time)

72%

Growth

(the ability to scale, innovate or capture new opportunities)

The partnership premium

82%

of venue leaders agree that strong mobile connectivity helps them attract better partners and events





ARTIST PERSPECTIVE

I have not turned down a show because of poor connectivity. If I did, I'd probably have half the work I did now. As I said, I almost expect bad connection, and if it's good connection, it's a bonus.

I'd definitely remember if I had bad connectivity [...] I'd be mindful of that and ask if they'd improved that or set up some contingencies.

I think what would happen [if there was good connectivity] was that a lot of the smaller and medium range artists and bands would start plugging into the large-scale effects and abilities that the big major stadium-based bands use at the moment. So that all those spectacular drone effects and things like that would actually scale down and come inside to the smaller venues, and it would become expected.

An untapped opportunity for MNOs

Mobile network operators are sitting on one of the most immediate opportunities for growth and differentiation: better connectivity in the high-footfall spaces where customers spend their time. They already have strong evidence for this: 'Customer loyalty and retention' is where leaders see the strongest ROI from connectivity investments in venues and spaces.

This is confirmed by mobile users: almost three-quarters (72%) of visitors would consider switching their mobile network provider due to poor connectivity experiences at a venue or space. However, just half of leaders within MNOs (48%) currently identify uninterrupted, seamless venue/space connectivity as an important area of their overall network strategy.

Rather than being a side consideration for MNOs, better venue and space connectivity is one of the most direct ways to advance their biggest strategic bets: investing in 5G/next-generation capabilities; enterprise and partnership opportunities; and enhancing consumer experience and loyalty.

SUPERFAN SPOTLIGHT



If your network works well in busy venues, it does make you feel like they understand your needs [...] it shows they value the customer experience – not just the monthly payments.

03 FAN-FIRST ERA





ARTIST PERSPECTIVE

> The horizons are limitless [...] the only drawback is reaching a limit of how much bandwidth there is and how much connectivity is possible.

As digital experiences and physical spaces continue to merge, connectivity is becoming central to modern experience design. By 2030, it will be a key brand differentiator.

The questions leaders need to ask are changing from "Is the network fast enough?" to "Does the experience feel smooth, welcoming and carefully crafted?"

Smart(er) investments

Four in five venue leaders (81%) believe seamless mobile connectivity is very or extremely important in ensuring their venue can fully realise the benefits of smart systems. However, there's a disparity between what they're currently prioritising and what visitors say would improve their experience.

As one of the superfans we interviewed predicted, *"fans will want faster, more interactive, and more immersive digital experiences in the future."* But today, our research shows that people are primarily focused on the more practical technologies that make their visit easier and more efficient. Meanwhile, venue leaders are largely looking to enhancement and optimisation technologies.

The top technologies visitors say would improve their experience in venues and spaces:

- Cashless payment systems
- Smart ticketing and fast-track access
- Mobile ordering for food, drinks or merchandise

The top technologies venue leaders are planning to implement in the next two years:

- Personalised digital experiences
- AI assistants /chatbots
- Personalised offers and real-time advertising

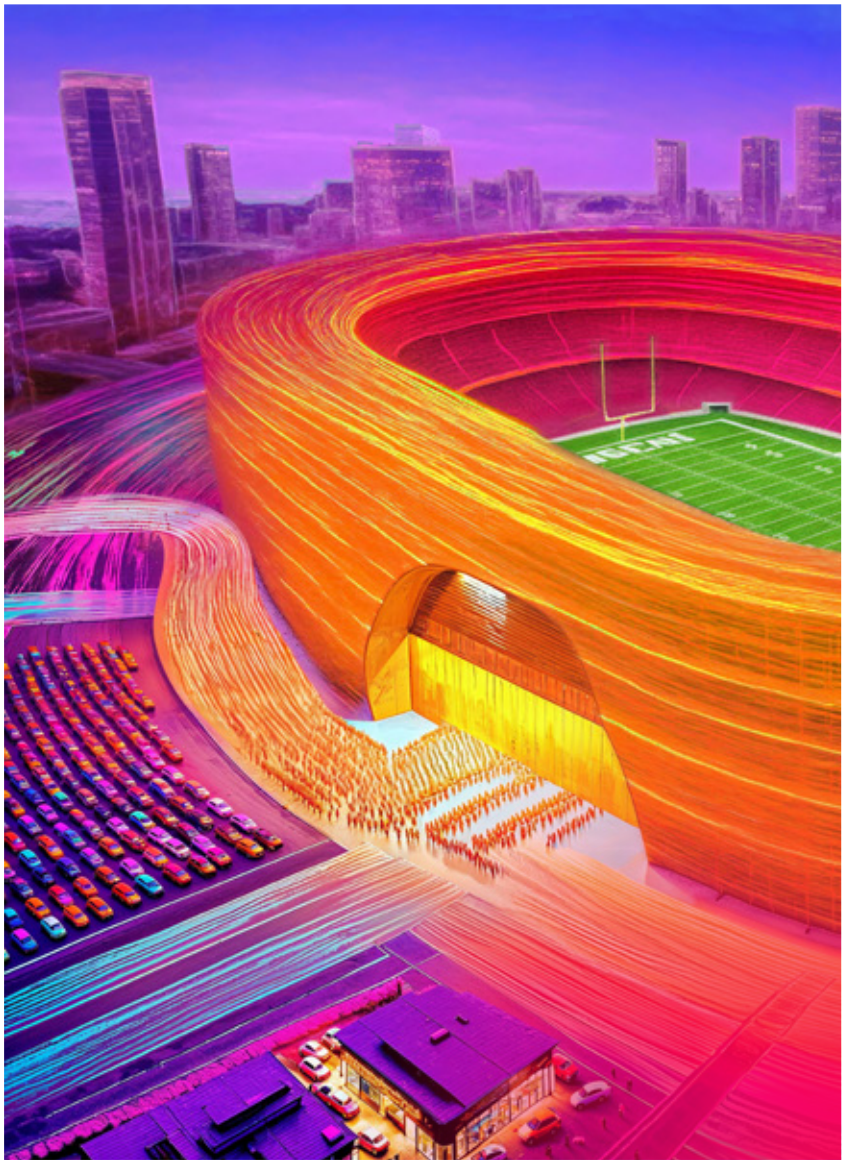
It will be important for venues to get the foundations in place – reliable connectivity, smooth operations and friction-free basics – before they start to experiment with more advanced smart-tech innovations.

The strategy gap

Venue leaders are aiming high when it comes to connectivity. Over two-fifths (42%) expect to reach 'leading' connectivity status by 2030 (meaning their infrastructure is best-in-class, enabling immersive, real-time, and personalised digital experiences at scale) – up from just 5% who believe they are there today.

But great connectivity alone isn't a silver bullet; leaders need a clear strategy in place. Currently, almost half (47%) say they respond to connectivity needs only as they arise, **without a long-term plan**. And only a quarter (24%) have a **proactive, strategic roadmap** aligned with future tech and visitor needs.

Ultimately, the path to 'leading connectivity' won't be defined by ambition alone, but by the strength and clarity of a venue's strategy. Forming a coordinated plan, spanning infrastructure, operations, and visitor experience, will be crucial to driving progress.



SUPERFAN SPOTLIGHT



Technology's moving so fast. If we're already using phones for tickets, payments, and everything else, then reliable high-speed connectivity inside venues should just be standard [by 2030]. It should reach a point where you can upload, stream, or message in real time, even with 60,000 people around. That's the level of progress I'd expect in the next few years, no waiting, no buffering, no "upload failed" messages.

04 THE ROAD TO NEXT-GEN JOY



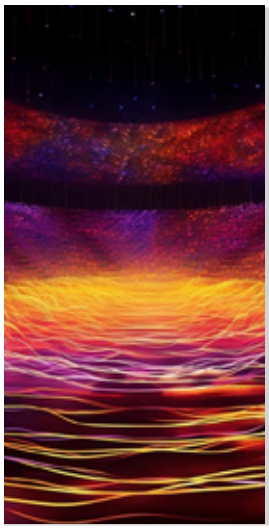
Connectivity is so much more than infrastructure; it's a strategic lever for creating standout experiences and long-term value. So what's stopping venues and MNOs from tapping into the Joy Dividend?

There are similarities between the biggest barriers to improving connectivity for both venues and MNOs. With high upfront cost topping the list, other shared challenges include infrastructure readiness and planning constraints.



The top barriers to improving connectivity for venues:

- High cost of infrastructure
- Budget limitations
- Legacy infrastructure limitations
- Planning or regulatory constraints
- Differing priorities between venue/space owners, operators and technology partners



The top barriers to investing in connectivity for venues/spaces for MNOs:

- High CapEx/upfront cost
- ROI uncertainty
- Permission or planning constraints
- Maintenance or ongoing support
- Venue/space readiness or lack of infrastructure

Connecting for change

The challenges for venues and MNOs may be shared, but so is the opportunity. True, frictionless connectivity can't be delivered in isolation. By working together, both sides can unlock the connected experiences that spark joy.

SUPERFAN SPOTLIGHT



I think the key is that venues and mobile providers need to work together more closely [...] It's really about collaboration. They need to ensure both a better fan experience and a sense of safety for everyone attending these big events.



Here's how venues and MNOs can align their efforts to turn bold aspirations into real results:

1

Share the spend

Co-funding upgrades creates a clearer path to investment, encourages faster decision making and ensures that improvements meet the needs of both the venue and the operator. The result? Infrastructure that pays back more quickly through better performance and higher satisfaction.

2

Lead with ROI

Connectivity should be positioned as a value driver, rather than an operational expense. By aligning on the commercial outcomes that matter – boosted revenue, improved dwell time, stronger loyalty, and enhanced partner value – venues and MNOs can prioritise initiatives that directly influence measurable returns.

3

Modernise smartly

Upgrades don't have to be all or nothing. A modular approach – integrating high-impact improvements into existing systems – helps teams move towards their future connectivity vision while maintaining stability. And treating Wi-Fi and DAS networks as complementary rather than competing solutions unlocks cost efficiencies and delivers a smoother, more reliable experience for everyone.

4

Tackle planning together

Collaboration in the planning process reduces friction, from navigating permissions to scheduling work, and expands the range of viable technical solutions. When venue teams and MNOs are pushing from the same direction, it leads to faster delivery and better outcomes for visitors.

5

Align on goals

Joint KPIs, shared performance dashboards, and regular review cycles help ensure that both sides are working toward the same vision of seamless connectivity. This keeps momentum high and ensures projects remain responsive to evolving audience needs.



For a clear path to higher profit and stronger value for your venue, book a guided

Joy Dividend benchmarking assessment

to discover your personalised score across three key performance dimensons: connectivity readiness, customer experience, and strategy and innovation.

See how your connectivity strategy compares with peers across the UK and reveal your most powerful performance opportunities.

Boldyn Networks can help

We have delivered advanced connectivity in over 300 venues worldwide, empowering customers to accelerate their networks, elevate their services and amplify their reach in the most efficient and cost-effective way possible.

Our work with leading names in sport and entertainment – including the Premier League, MLS, Silverstone, Ascot, Crypto.com, and LA Live – gives us deep insight into the needs of venues and MNOs. We bridge the gap between them with tailored connectivity solutions, from private Wi-Fi to distributed antenna systems (DAS), delivering reliable, full-coverage performance in the most high-traffic, high-density and technically challenging environments.

We also understand the commercial realities venues and MNOs operate within. That's why we offer a range of commercial models, from traditional CAPEX and fully managed OPEX approaches to hybrid financing structures that make investment more accessible and aligned to long term strategy.

Find out more

To learn more, visit boldyn.com or contact Gavin O'Meara, Commercial Director, Boldyn Networks.

About the study

The Joy Dividend is based on insights from over 1,000 voices across the UK and Ireland.

Opinion research

Between October and February 2026, Boldyn Networks conducted an opinion research study. It was developed by B2B thought leadership consultancy, Man Bites Dog, with fieldwork carried out by global market research agency, Coleman Parkes Research Limited.

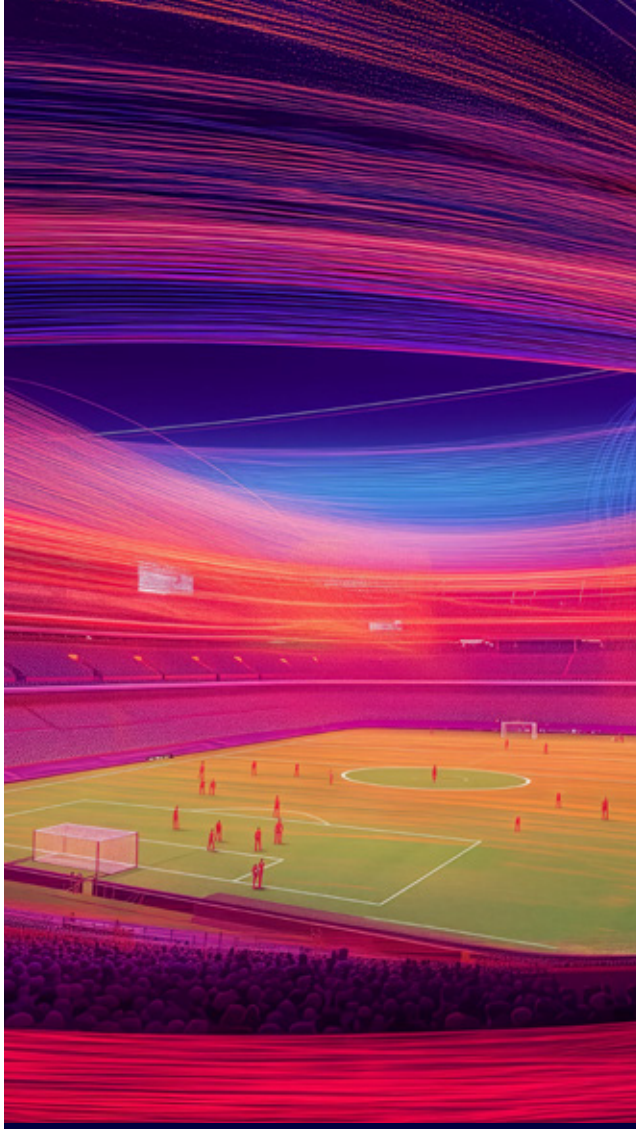
The sample consisted of:

- 510 mobile users (aged 18+) who regularly visit venues and spaces such as stadiums, arenas, retail centres, education or cultural institutions, tourist attractions, and transport hubs.
    - [1] Certain questions were asked only of a subset of 220 respondents. These data points are clearly indicated where included in the report.
- 450 venue/space leaders – with job titles including Head of Operations, Head of Customer Experience, Head of Technology, Site Director.
- 40 mobile network operator (MNO) leaders – with job titles including Director of Commercial Strategy, Director of Network Strategy & Planning, Director of Strategy & Business Development, Director of Network Investment, Chief Technology Officer, Chief Strategy Officer.

Qualitative interviews

To support the quantitative data, we conducted qualitative interviews with two key groups of interest.

- 30 qualitative interviews with ‘superfans’ across sport, music and other cultural experiences.
- 5 qualitative interviews with artists (musicians, DJs, visual artists, performers or digital artists).



***The Joy Dividend* is based on insights from over**

1k

voices across the UK and Ireland.

