Stadium Connectivity Outlook Survey
Results and Analysis
October 2023

Presented by: Stadium Tech Report & verizon
RESEARCH OVERVIEW

Stadium Tech Report conducted the 2023 Stadium Connectivity Outlook survey in partnership with Verizon. The research was conducted to find out the "state of the stadium" marketplace as it pertains to issues around venue connectivity and technology deployments, including:

- What are their investment priorities in connectivity and related technologies
- What fan experience pain points can connectivity and other related technologies help solve
- How can connectivity investments and strategy benefit the business bottom line
- How can venues also solve for necessary security measures in a more-connected world

METHODOLOGY

- The survey was conducted online by Stadium Tech Report during August and September 2023, targeting our reader audience of stadium technology professionals. This includes people working directly for teams, schools and venues, as well as consultants contracted to assist venues in their technology deployments.
- This was a blind data collection process. Verizon was not identified as the co-sponsor of the survey.
RESEARCH OVERVIEW

VENUE PROFILES

Respondents came from all corners of the stadium and arena world, including representatives from the NFL, MLB, NHL, NBA and MLS professional leagues. There were also respondents from a wide range of major U.S. universities, as well as from smaller schools and smaller venues, like concert halls and convention centers.

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<tr>
<th>VENUE CAPACITY</th>
<th>Respondents</th>
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<td>&lt;5k</td>
<td>1%</td>
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<tr>
<td>5-9.99k</td>
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<td>10-14.99k</td>
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<td>15-19.99k</td>
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<td>20-39.99k</td>
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<td>30-49.99k</td>
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<td>50-74.99k</td>
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RESEARCH OVERVIEW

RESPONDENT PROFILES

More than 36 percent of respondents were directors of IT; another 34 percent were CIOs.

- CIO: 34%
- Director of IT: 36%
- CEO: 6%
- CMO: 3%
- IT Staff Exec: 6%
- Consultant: 9%
- Arena Ops: 4%
- Broadcast Tech: 2%
KEY TAKEAWAYS

1. Cashierless concession technology is the top initiative for venues in 2024. Staffing is still a concern, but less so than last year

2. The two biggest challenges venue professionals face are growing revenues and decreasing operational costs

3. Venues are increasingly interested in deploying a private 5G network to support critical back of house operations and guest security

4. Better wireless connectivity for fan-facing and back-of-house networks continues to be a top objective

5. More venues believe they are ahead of the curve when it comes to their digital transformation strategy
DETAILED FINDINGS
Implementing cashierless concession technology and improving in-venue connectivity are the top action items for venue professionals in 2024

SURVEY QUESTION:
Which initiatives are on your roadmap for 2024? Check all that apply.

- Cashierless concessions technology: 65%
- Improve in-venue connectivity for fans: 59%
- Improve in-venue connectivity for operations (EPOS, security, broadcast/production, etc.): 54%
- Walk-through security screening: 46%
- Personalized second screen experiences (multi-cam feeds, AR overlays, stats, etc.): 33%
- Smart facility management (lighting controls, HVAC / air quality / energy monitoring, predictive maintenance, etc.): 29%
Network and web security and wireless connectivity lead the list of planned IT infrastructure investments for 2024

SURVEY QUESTION:
Which areas will you be making changes in your IT infrastructure to support growth or reduce operating costs over the next 12-18 months? Check all that apply.

- Network/web security: 60%
- Wireless/in-building connectivity: 53%
- New Hardware: 50%
- New Software: 44%
- Bandwidth: 38%
- Network Management: 34%
- Cloud/hybrid cloud: 33%
- Voice and remote collaboration: 16%
- Virtualization/VPN: 15%
Lowering operating costs, increasing revenues and limited budgets are venues' biggest challenges for the next year.

SURVEY QUESTION:
What are the biggest challenges you face in the next 12 months? Check all that apply.

- Lowering operating costs: 56%
- Increasing revenues (gate, concession, merchandise, parking, ads/sponsorship): 55%
- Budgetary constraints: 53%
- Staffing: 45%
- Changing demographics and evolving expectations of live events attendees: 38%
- Macroeconomic conditions: 24%
- Competition from other entertainment options: 14%
- Resurgence of COVID-19 (or other pandemic): 4%
Cashierless concession technology continues its rapid growth, and is already deployed in more than 66 percent of venues.

**SURVEY QUESTION:**
Does your venue have concessions stands with cashierless checkout technology?

- **Yes** 66%
- **No** 16%
- **No, but evaluating** 18%
Eighty-seven percent of venues with cashierless checkout concession stands have more than one stand.

**SURVEY QUESTION:**
If yes, how many cashierless checkout concession stands does your venue have?

- One: 13%
- 2-5: 48%
- More than 5: 39%
Most venues are actively evaluating sports betting operations

**SURVEY QUESTION:**
Does your venue have (check all that apply)

- Nothing yet, but evaluating: 81%
- An official sports betting partner: 18%
- Physical sports book in stadium: 3%
- Betting kiosks in stadium: 3%
- A mobile sports betting app: 1%
Venues are increasingly interested in deploying a private 5G network to support critical back-of-house operations and guest security.

**SURVEY QUESTION:**

With private 5G, you can isolate a portion of the bandwidth and dedicate it to a specific workflow. Which workflows would you use it for? Check all that apply.

- Back of house/corporate operations: 56%
- Security /surveillance / crowd management communications: 48%
- On-field operations: 45%
- In-venue commerce platforms: 35%
- Player performance/data analytics applications: 33%
- IPTV + Digital Signage: 26%
- Content contribution distribution (eg: in-venue broadcast production): 24%
- Guest voice & data connectivity: 24%
- Microbetting (in-app or at sports book): 13%
Venues who say their security posture is 'not good enough' declined from 20 percent in 2022 to 15 percent in 2023

SURVEY QUESTION:
My existing security posture/strategy is:

- Adequate: 66%
- Not good enough: 15%
- Ironclad: 9%
- I don't know: 10%
In terms of digital transformation, 8 percent of venues said they are 'far ahead' of others compared to just 1 percent last year.
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THANK YOU

FOR MORE INFORMATION

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