

STADIUM

TECH REPORT



Stadium Connectivity Outlook Survey

Results and Analysis

October 2023

Presented by: Stadium Tech Report & **verizon**✓

RESEARCH OVERVIEW

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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

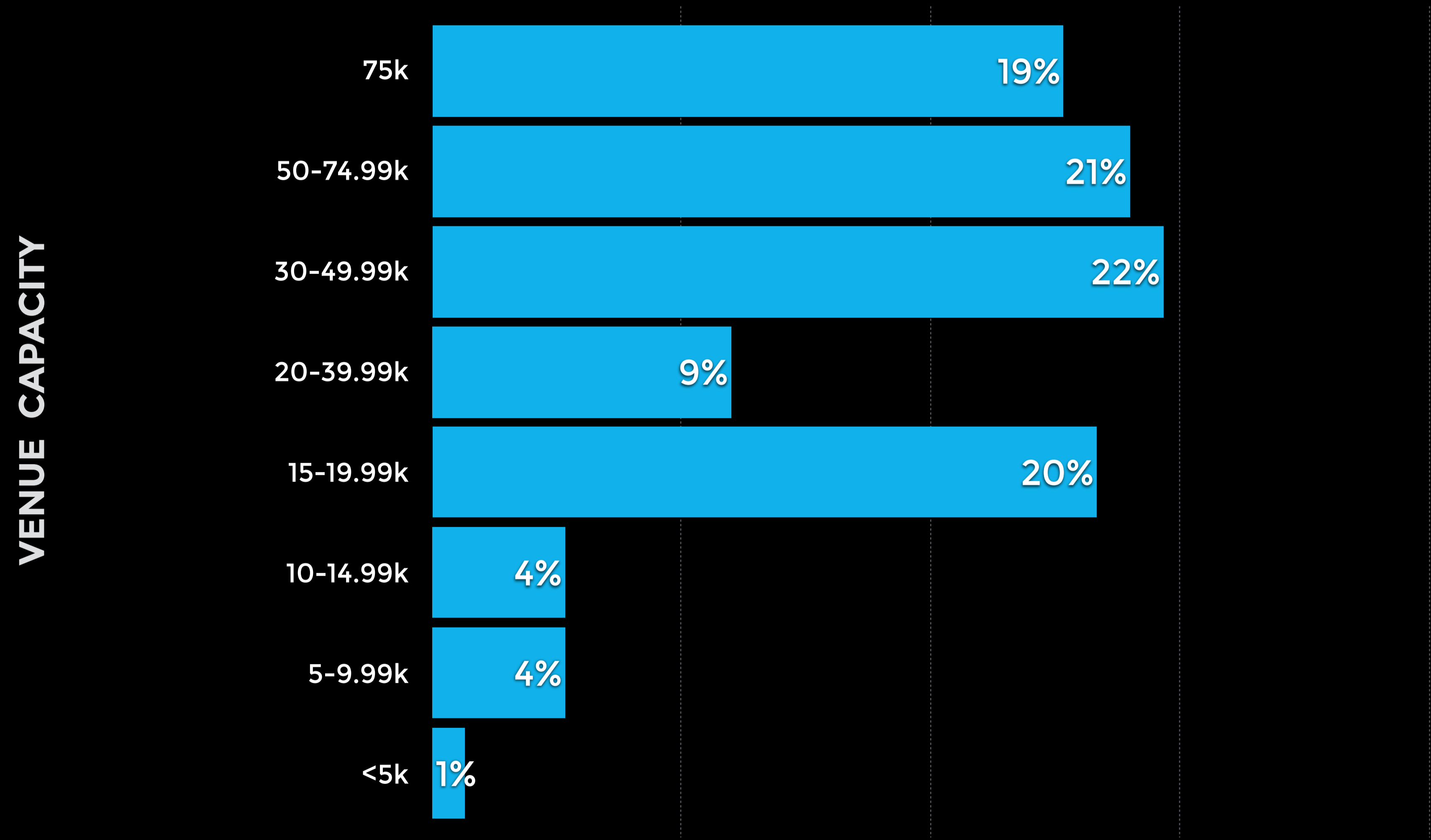
- The survey was conducted online by Stadium Tech Report during August and September 2023, targeting our reader audience of stadium technology professionals. This includes people working directly for teams, schools and venues, as well as consultants contracted to assist venues in their technology deployments.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



RESEARCH OVERVIEW

VENUE PROFILES

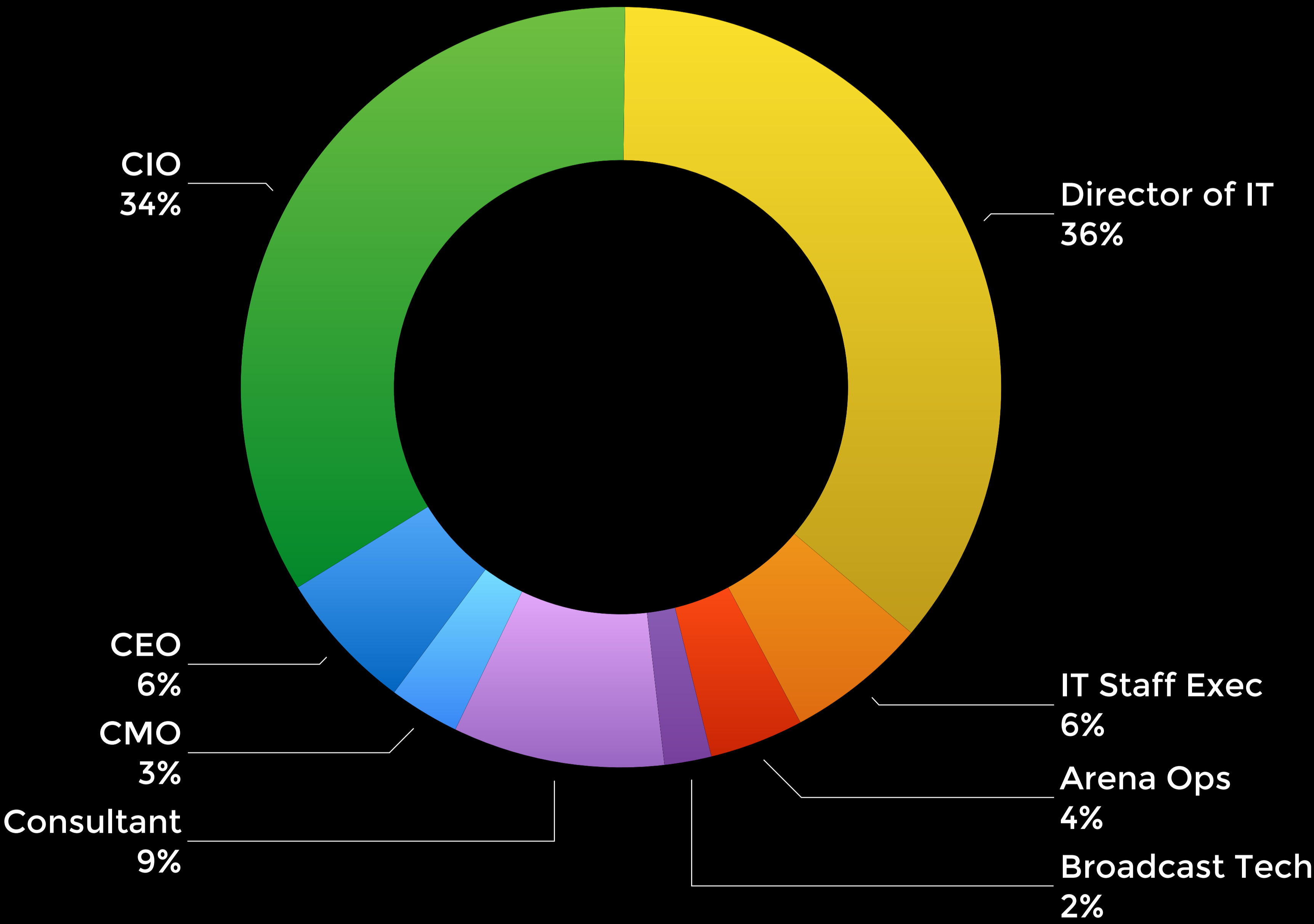
Respondents came from all corners of the stadium and arena world, including representatives from the NFL, MLB, NHL, NBA and MLS professional leagues. There were also respondents from a wide range of major U.S. universities, as well as from smaller schools and smaller venues, like concert halls and convention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



RESEARCH OVERVIEW

RESPONDENT PROFILES

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



RESEARCH OVERVIEW

KEY TAKEAWAYS

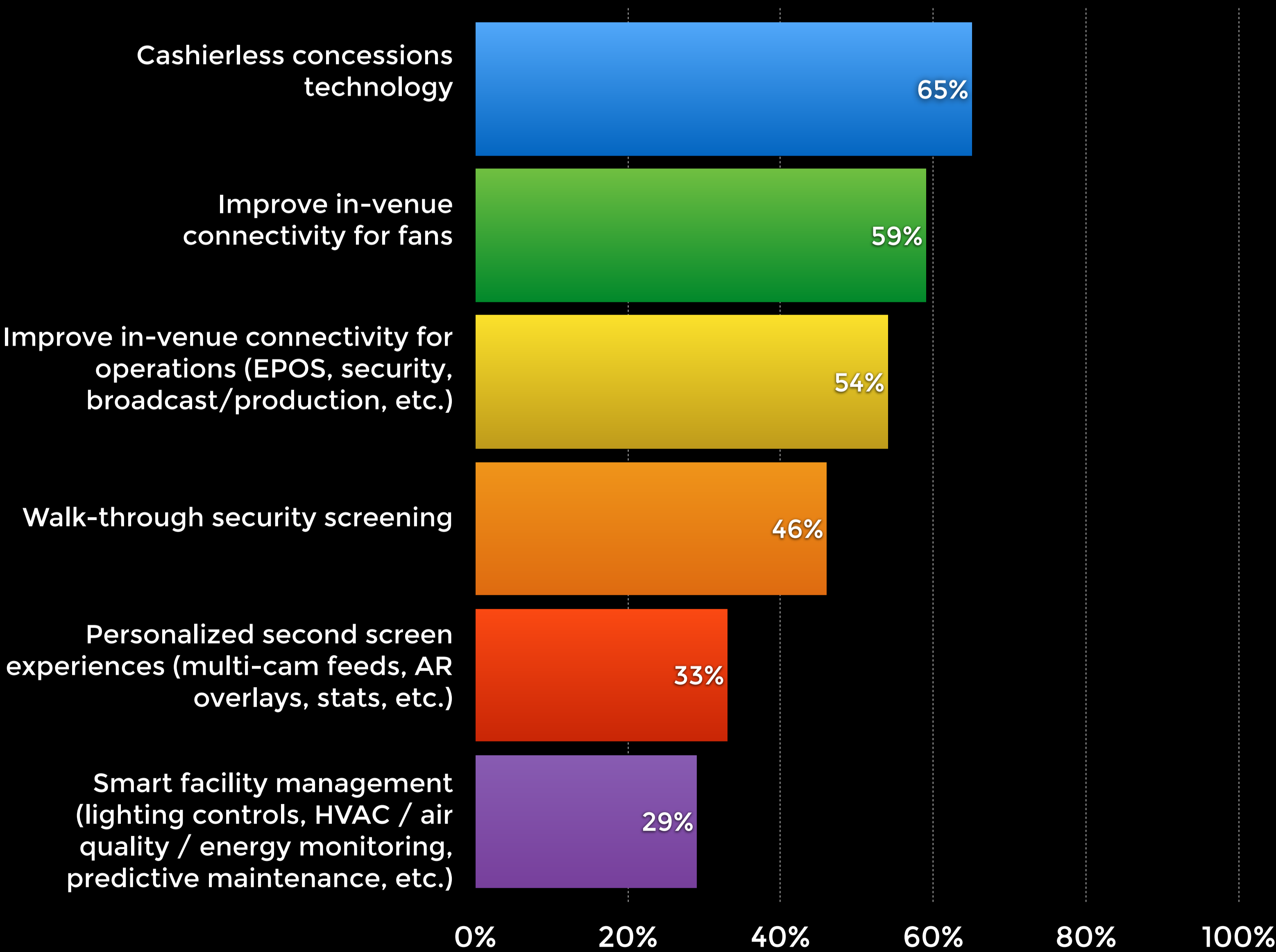
1. Cashierless concession technology is the top initiative for venues in 2024. Staffing is still a concern, but less so than last year
2. The two biggest challenges venue professionals face are growing revenues and decreasing operational costs
3. Venues are increasingly interested in deploying a private 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:

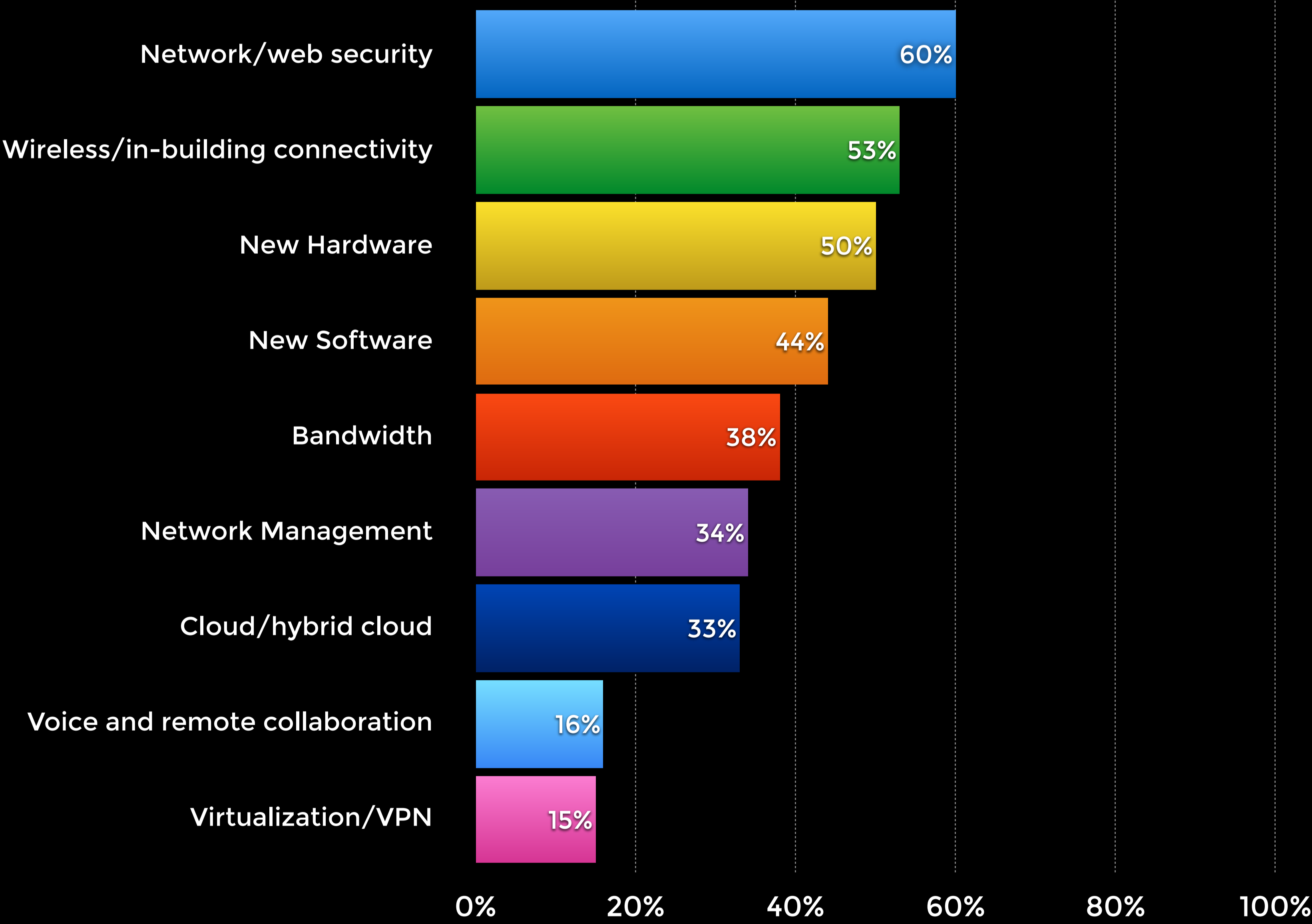
Which initiatives are on your roadmap for 2024? Check all that apply.



Network and web security and wireless connectivity lead the list of planned IT infrastructure investments for 2024

SURVEY QUESTION:

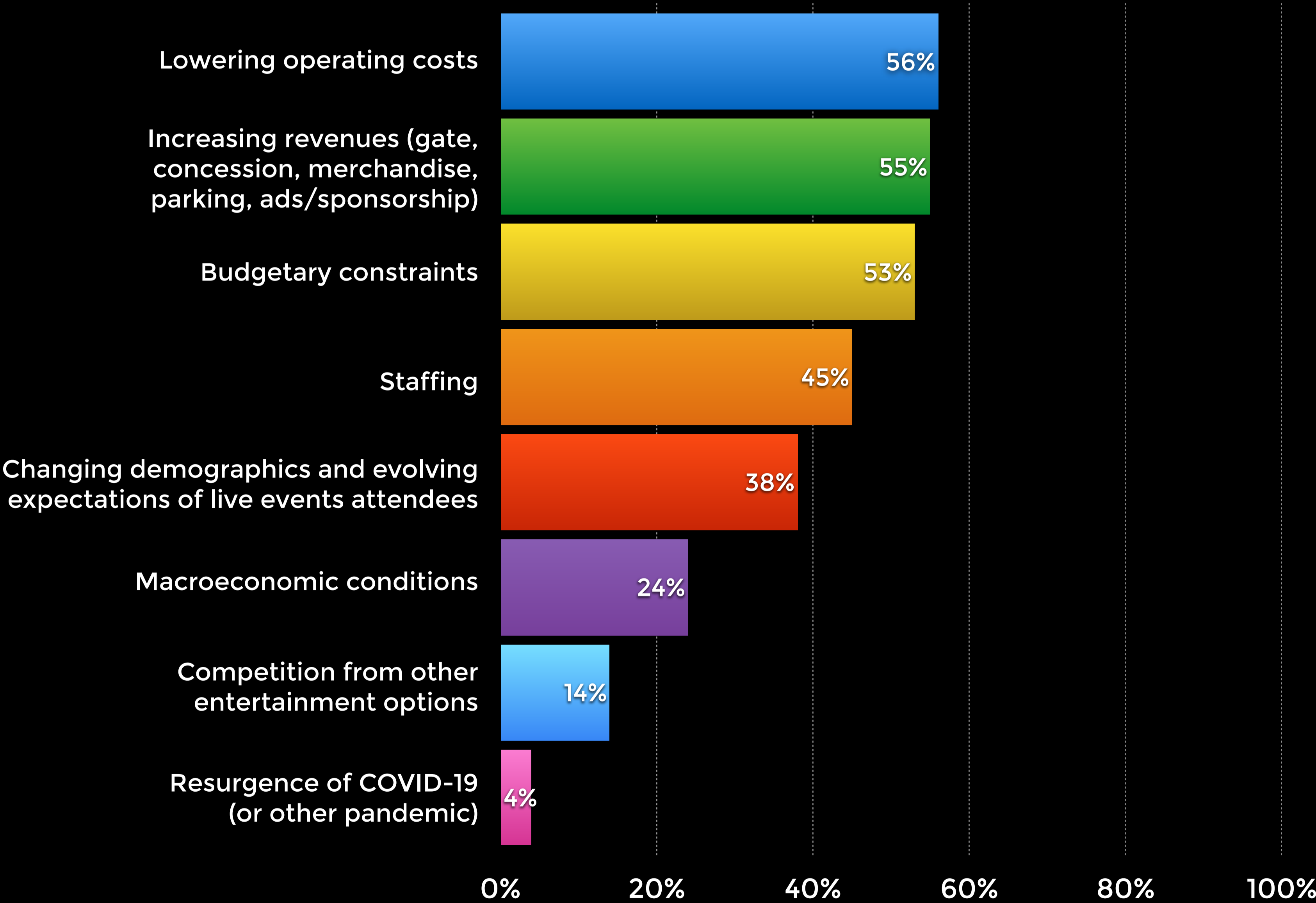
Which areas will you be making changes in your IT infrastructure to support growth or reduce operating costs over the next 12-18 months? Check all that apply.



Lowering operating costs, increasing revenues and limited budgets are venues' biggest challenges for the next year

SURVEY QUESTION:

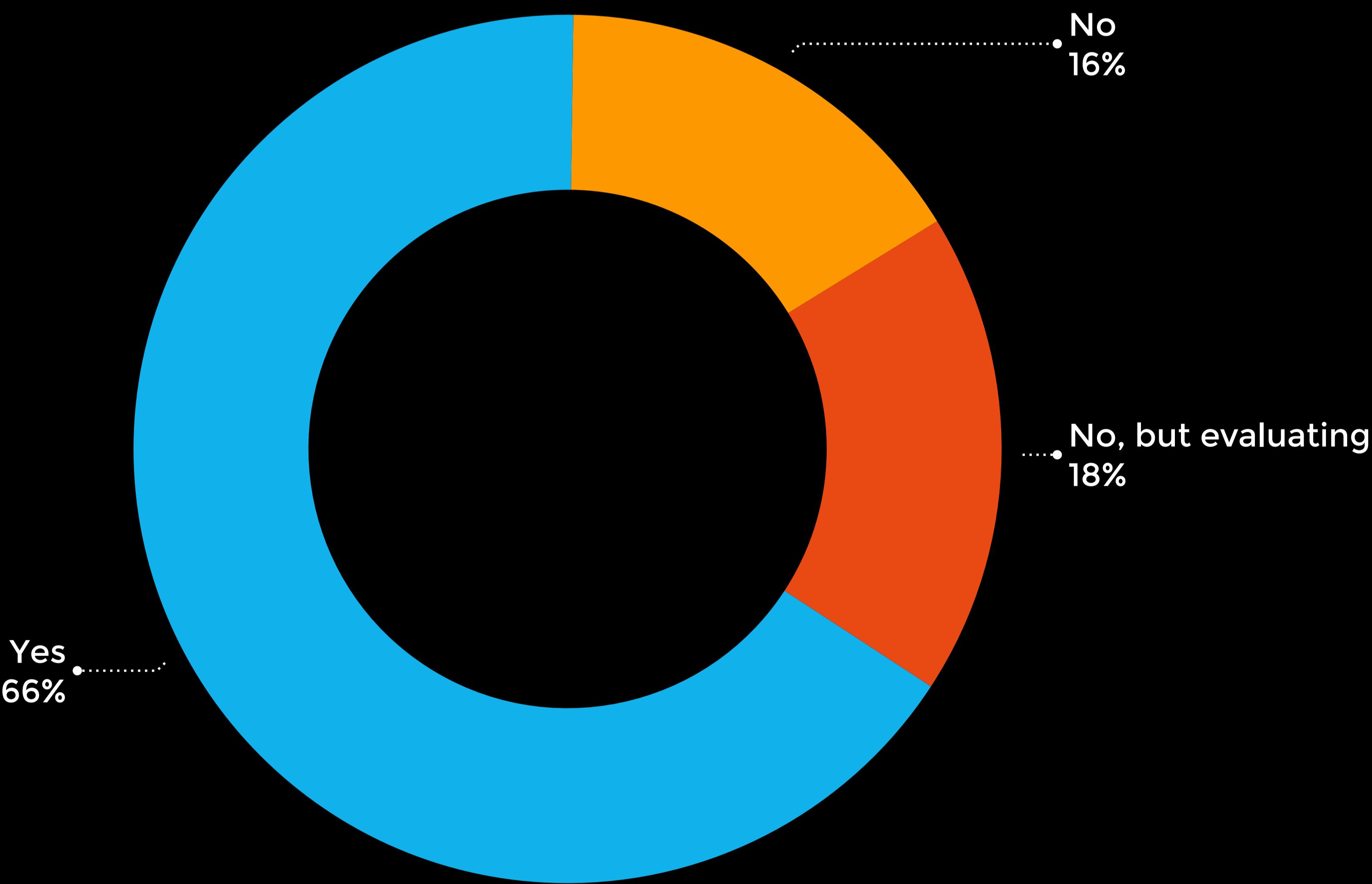
What are the biggest challenges you face in the next 12 months? Check all that apply.



Cashierless concession technology continues its rapid growth, and is already deployed in more than 66 percent of venues

SURVEY QUESTION:

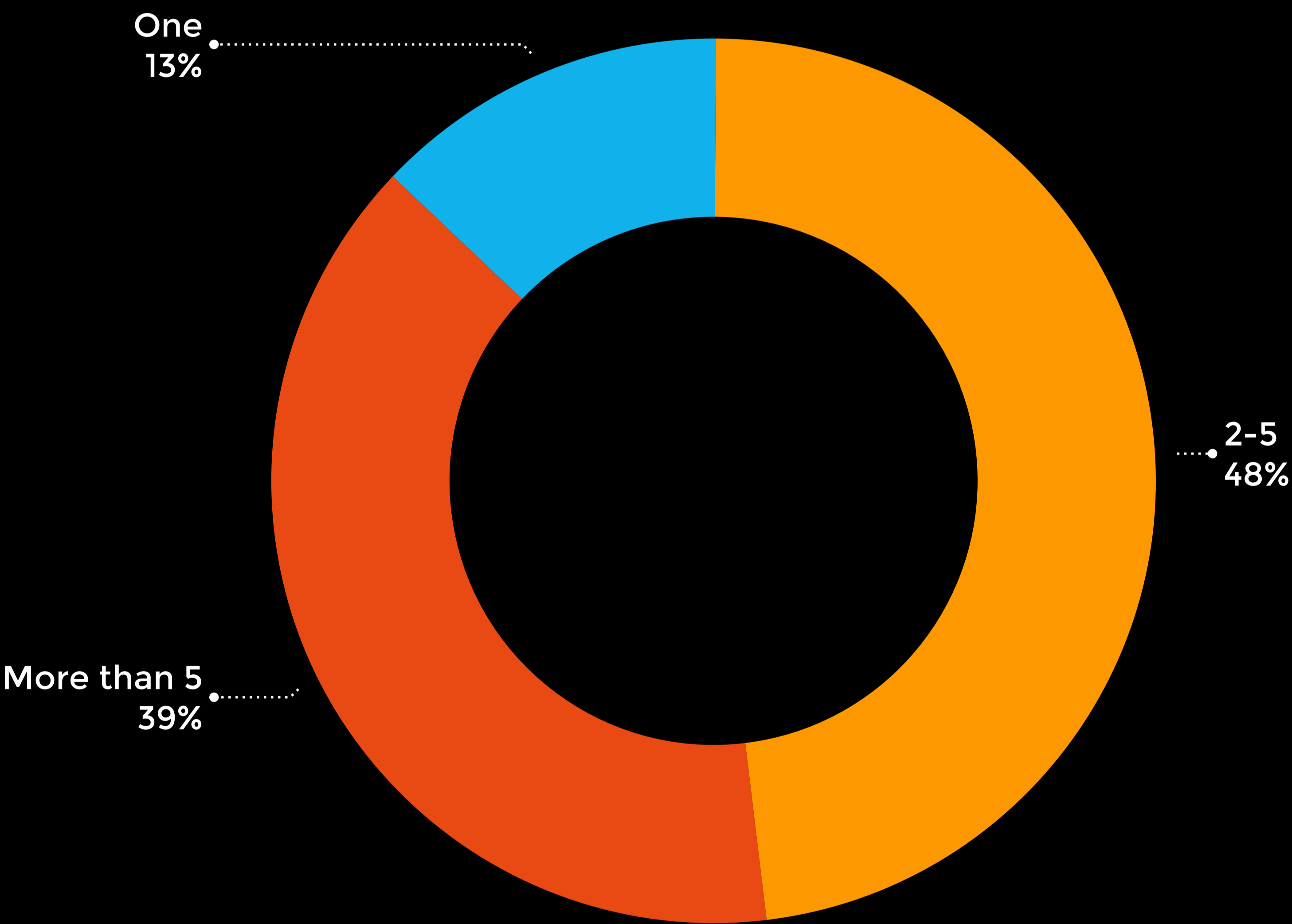
Does your venue have concessions stands with cashierless checkout technology?



Eighty-seven percent of venues with cashierless checkout concession stands have more than one stand

SURVEY QUESTION:

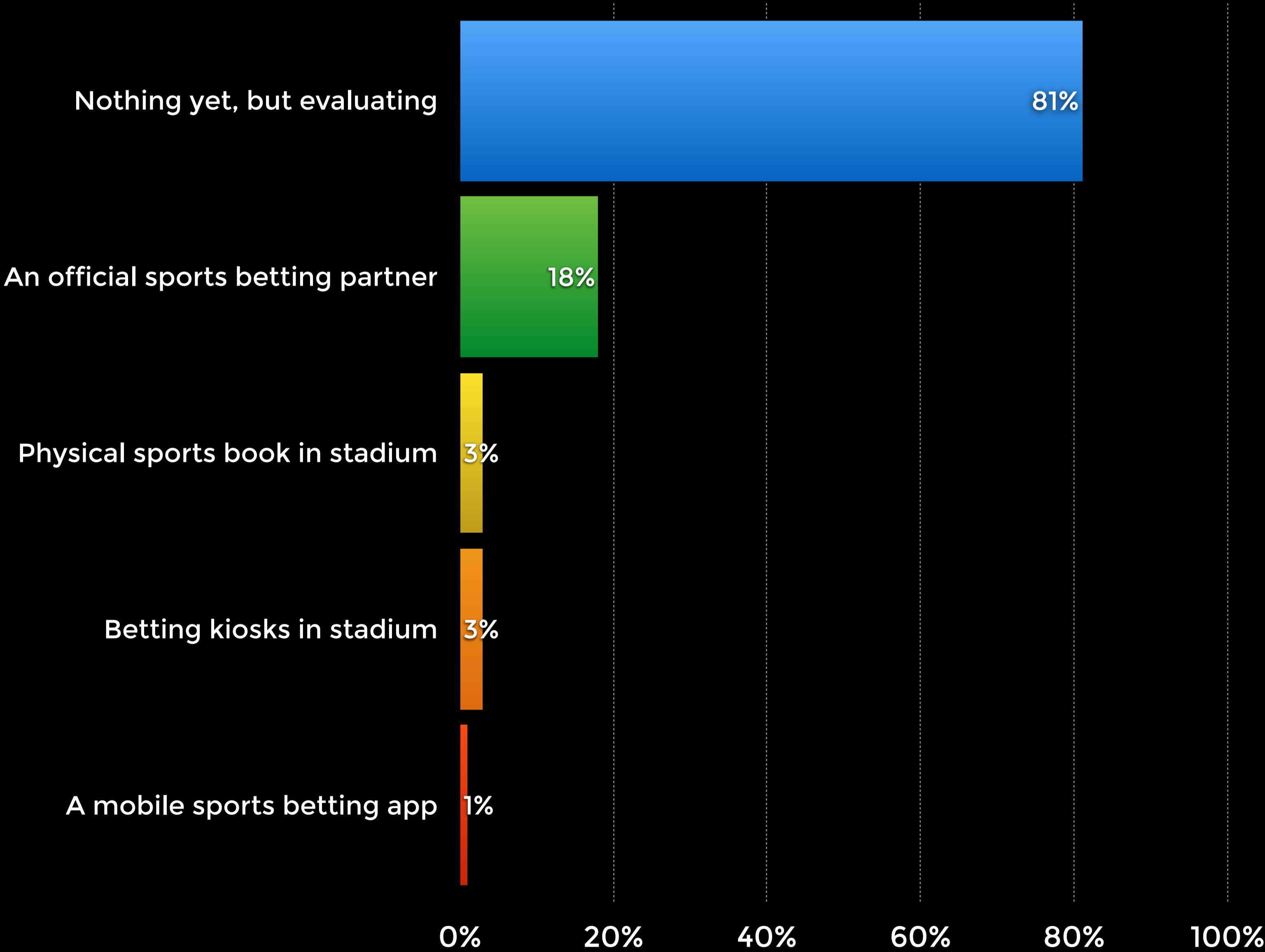
If yes, how many cashierless checkout concession stands does your venue have?



Most venues are actively evaluating sports betting operations

SURVEY QUESTION:

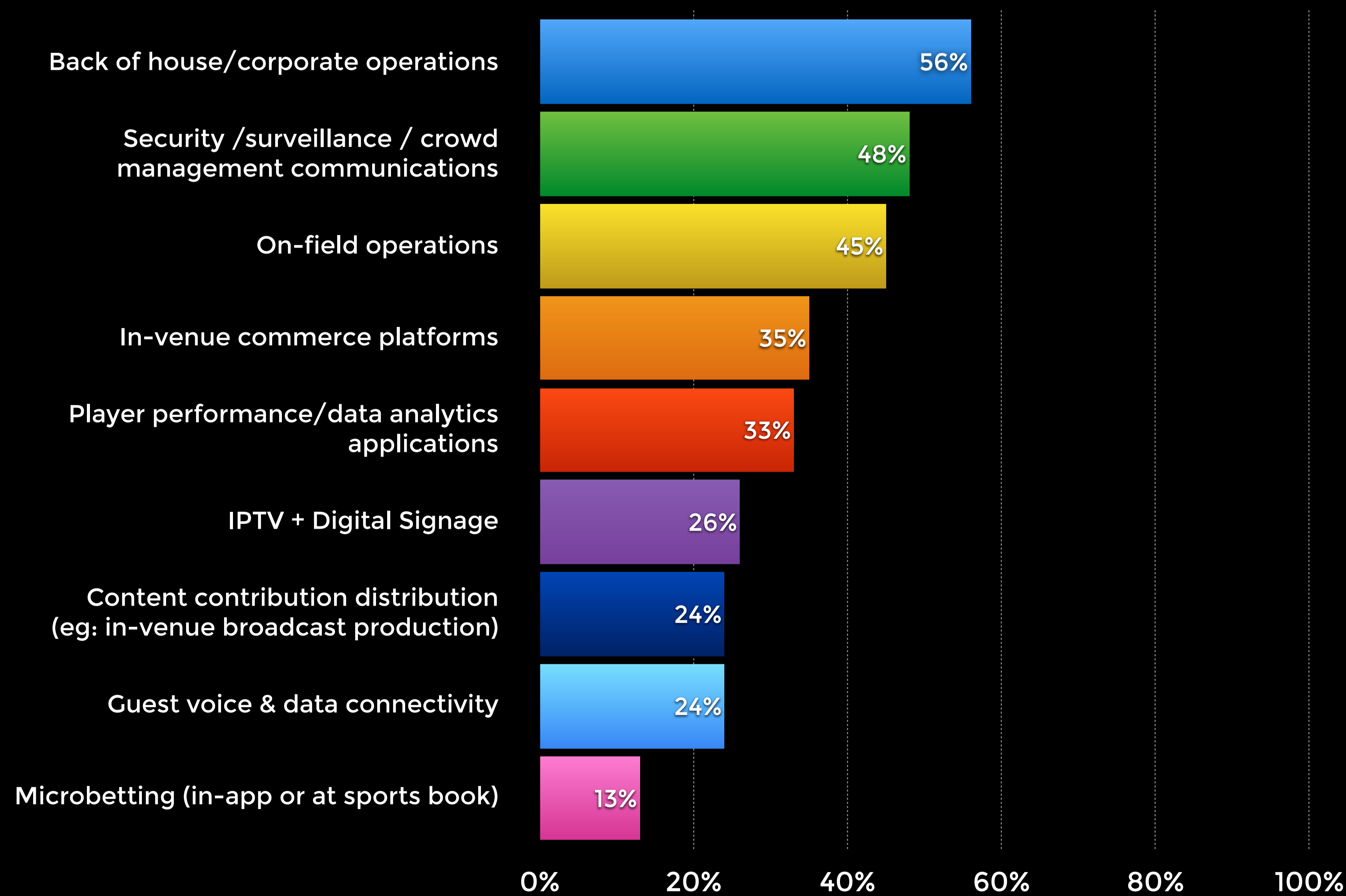
Does your venue have (check all that apply)



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

SURVEY QUESTION:

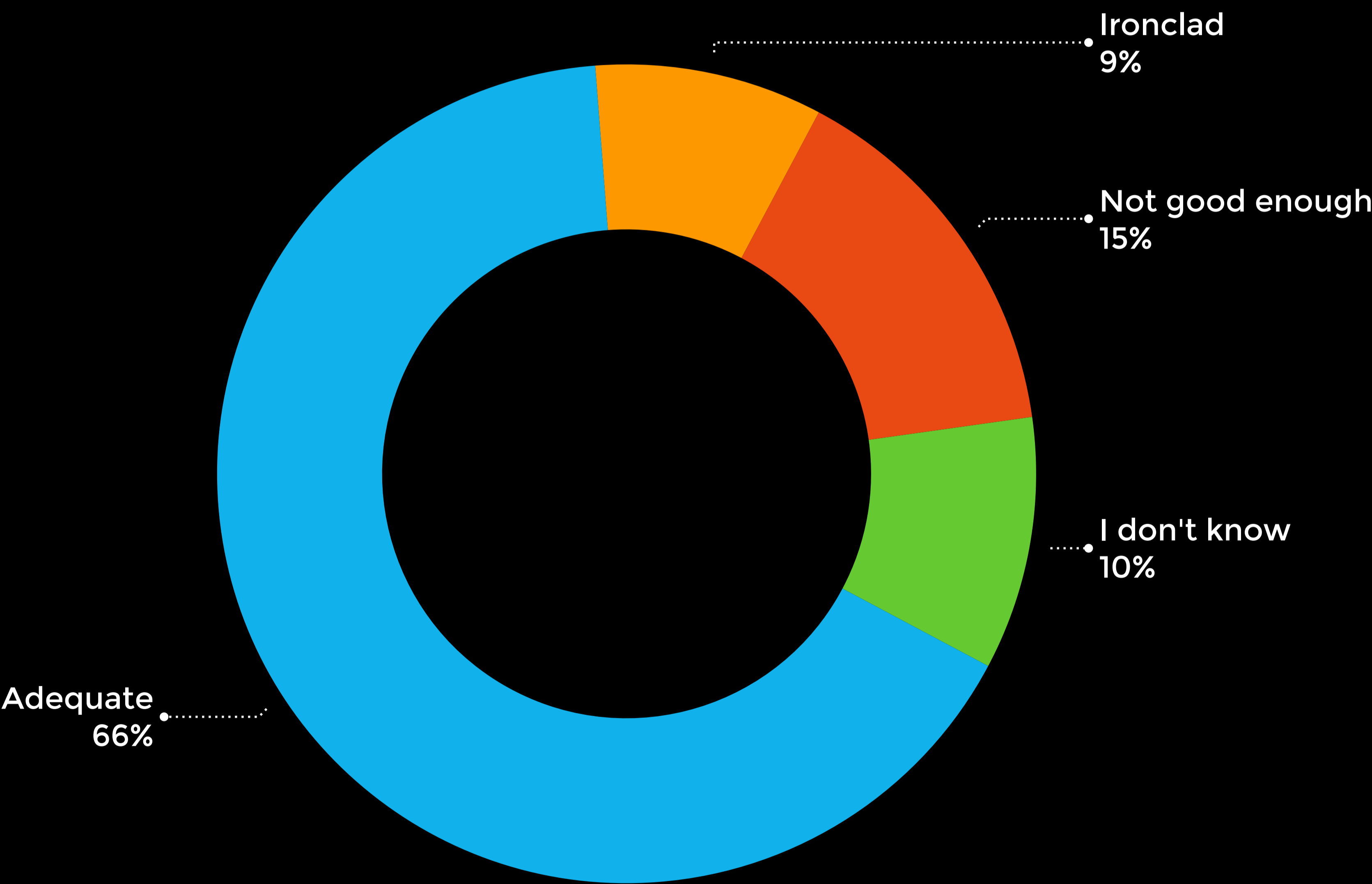
With private 5G, you can isolate a portion of the bandwidth and dedicate it to a specific workflow. Which workflows would you use it for? Check all that apply.



Venues who say their security posture is 'not good enough' declined from 20 percent in 2022 to 15 percent in 2023

SURVEY QUESTION:

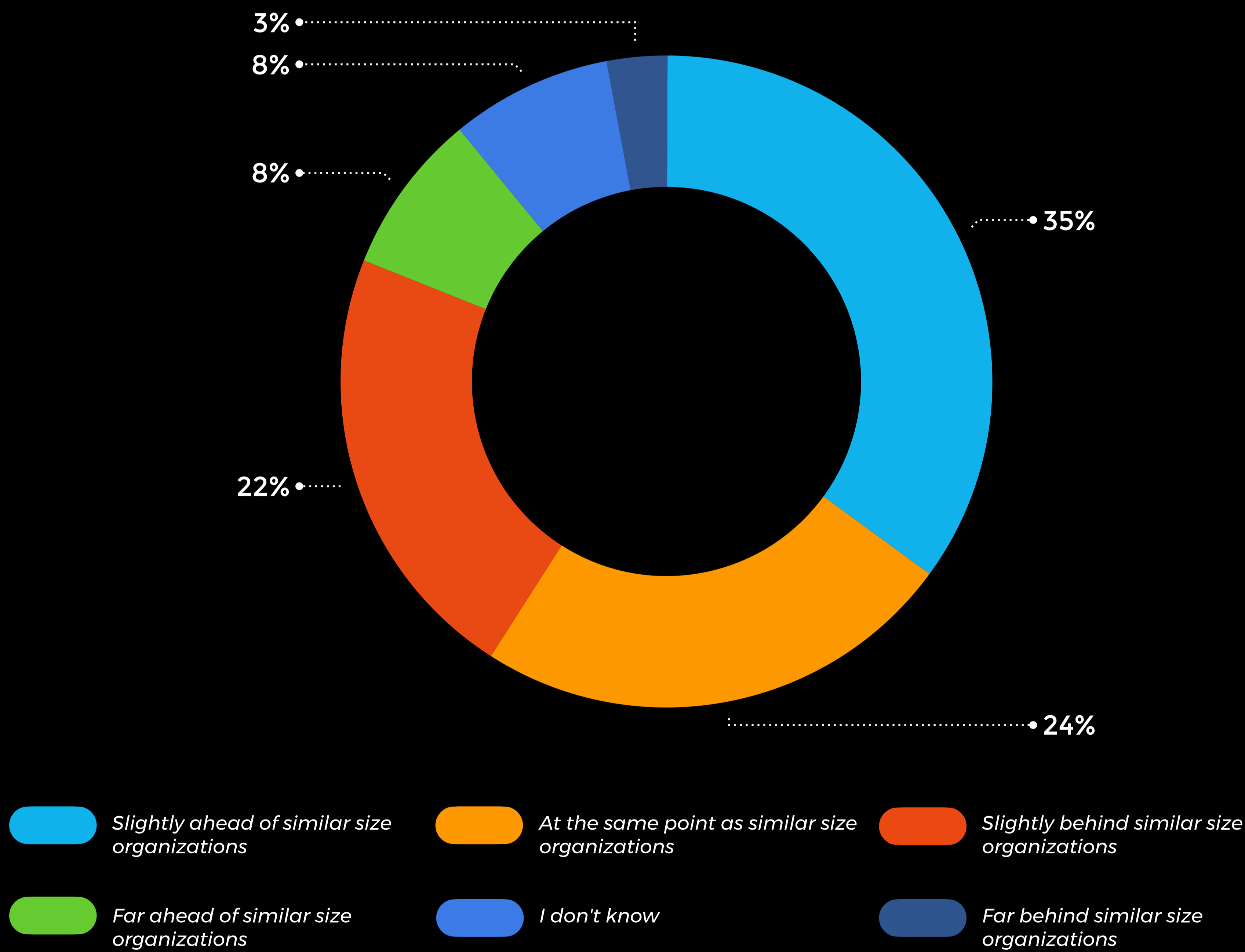
My existing security posture/strategy is:



In terms of digital transformation, 8 percent of venues said they are 'far ahead' of others compared to just 1 percent last year

SURVEY QUESTION:

In terms of digital transformation execution our venue is:



RESEARCH OVERVIEW

KEY TAKEAWAYS

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THANK YOU

FOR MORE INFORMATION

[Paul Kapustka](#) - Editor in Chief, Stadium Tech Report
E: kaps@stadiumtechreport.com