

STADIUM

TECH REPORT



Stadium Connectivity Outlook Survey

Results and Analysis

October 2021

Presented by: Stadium Tech Report & **verizon**^v

RESEARCH OVERVIEW

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Stadium Tech Report conducted the 2021 Stadium Connectivity Outlook survey in a partnership with Verizon. The research was conducted to find out the "state of the stadium" marketplace as it pertained to issues around venue connectivity, with a specific focus on challenges facing venues as they prepared for a post-pandemic world, including:

- What were their investment priorities in connectivity technology
- What fan experience pain points could connectivity technology help solve
- How would connectivity investments and strategy benefit the business bottom line
- How would venues also solve for necessary security measures in a more-connected world

METHODOLOGY

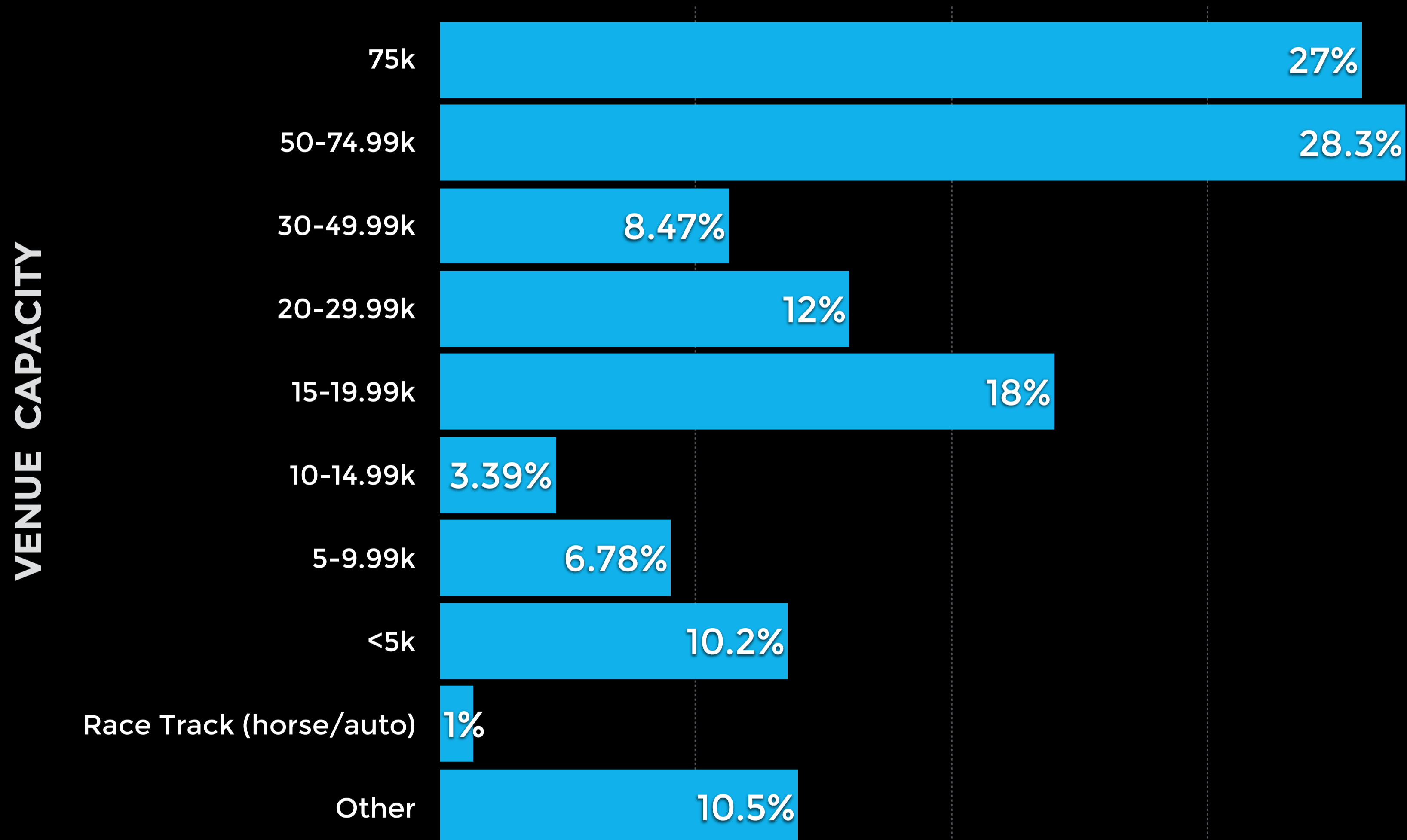
- The survey was conducted online by Stadium Tech Report during July and August, 2021, targeting our reader audience of stadium technology professionals. This includes professionals working directly for teams, schools and venues, as well as professional consultants contracted to assist venues in their technology deployments.
- More than 100 qualified respondents participated in the survey
- This was a blind data collection process, Verizon was not identified as the co-sponsor of the survey.



RESEARCH OVERVIEW

VENUE PROFILES

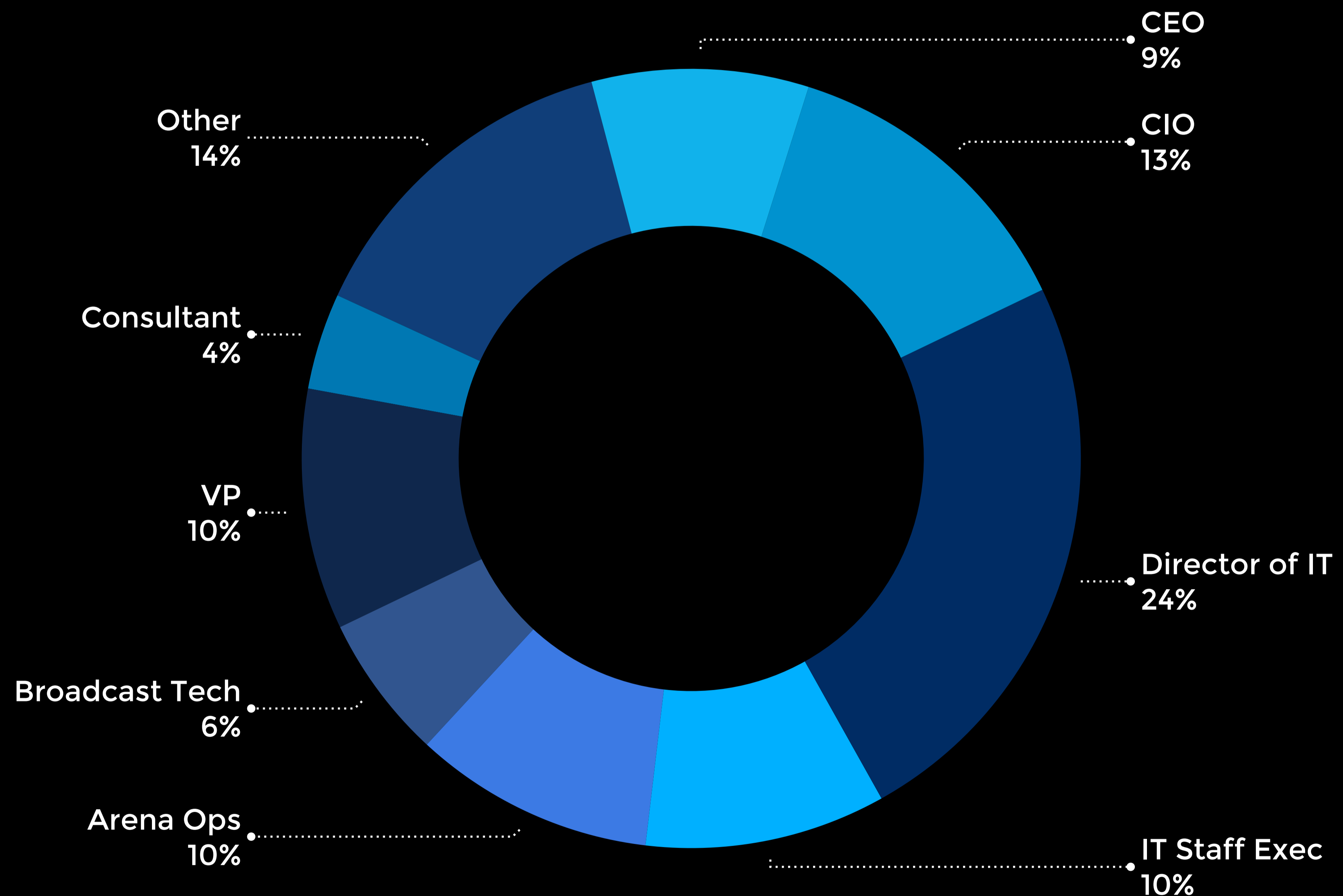
Respondents came from all corners of the stadium and arena world, including representatives from the NFL, MLB, NHL, NBA and MLS U.S. professional leagues. There were also respondents from a wide range of major U.S. universities, as well as from smaller schools and smaller venues, like concert halls and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



RESEARCH OVERVIEW

RESPONDENT PROFILES

More than 44 percent of respondents had titles of CEO, CIO or director of IT.



RESEARCH OVERVIEW

KEY TAKEAWAYS

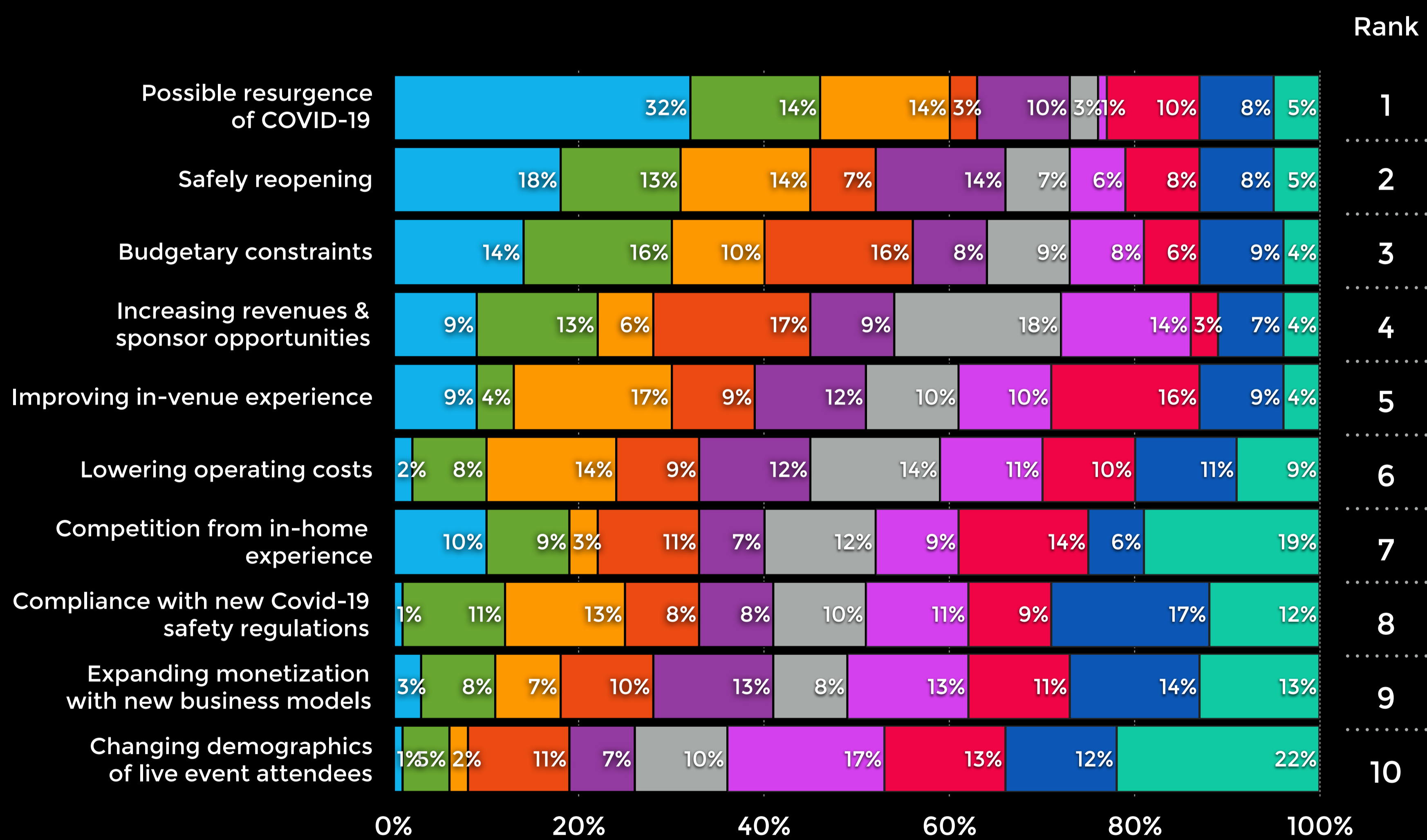
1. Most venues have basic connectivity deployed, predominantly 4G LTE and Wi-Fi
2. Covid-19 accelerated the process of adding technology to solve new issues
3. Technology is being asked to lower opex, generate more revenue and enable a better fan experience
4. New touchpoints call for increased cybersecurity across all operations
5. Many venues are still seeking information and direction for their technical journey.

DETAILED FINDINGS

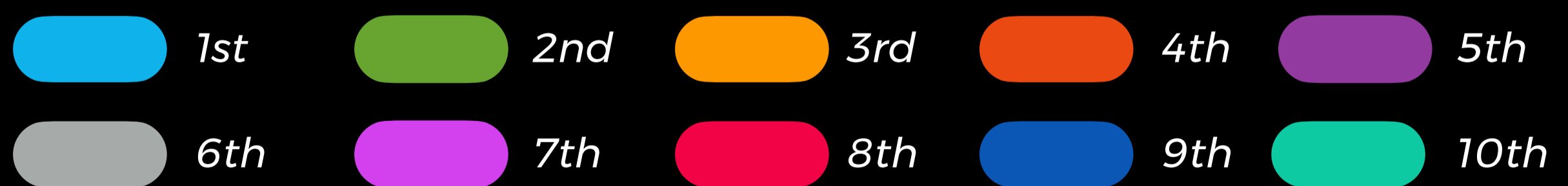
Venues pointed toward Covid-19 concerns as their greatest current challenge, especially with reduced budgets due to last year's shutdowns.

SURVEY QUESTION:

Which of the following represent the greatest challenges you face over the next 12 month period?



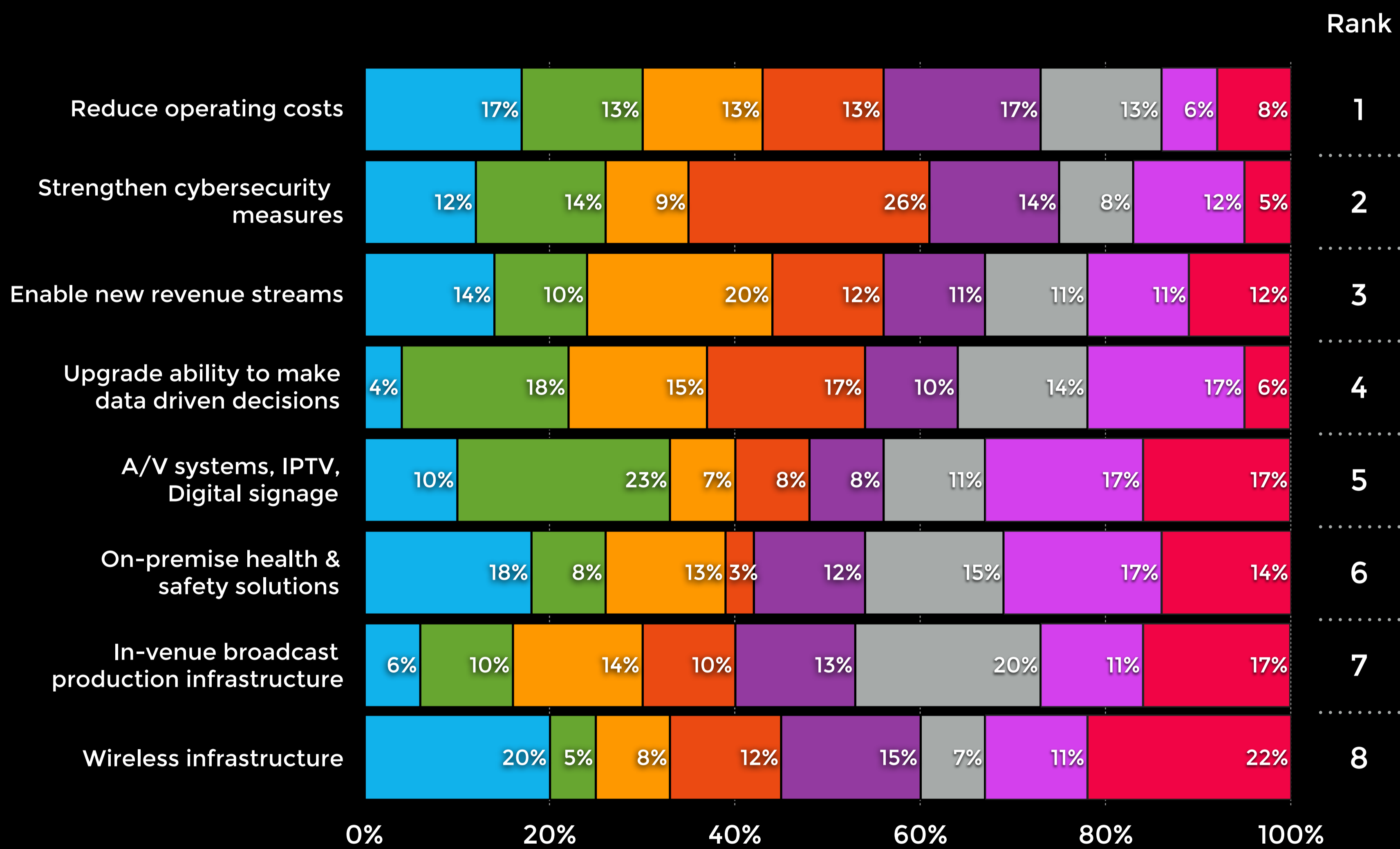
Respondents ranked answers in order of importance



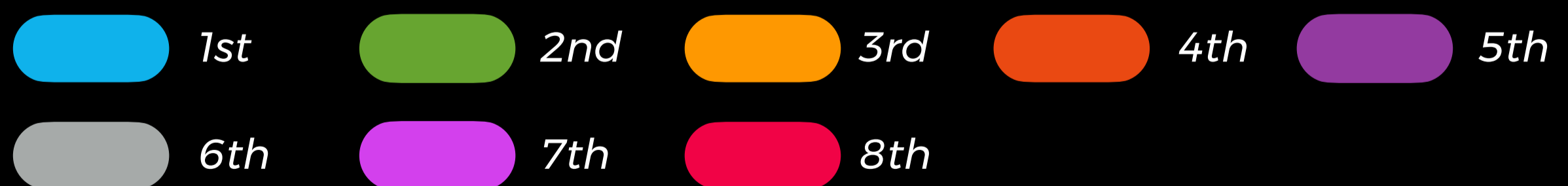
Venues are placing a priority on reducing OPEX while also looking to invest in more security infrastructure.

SURVEY QUESTION:

What are your top technology investment priorities over the next 12-18 month period?



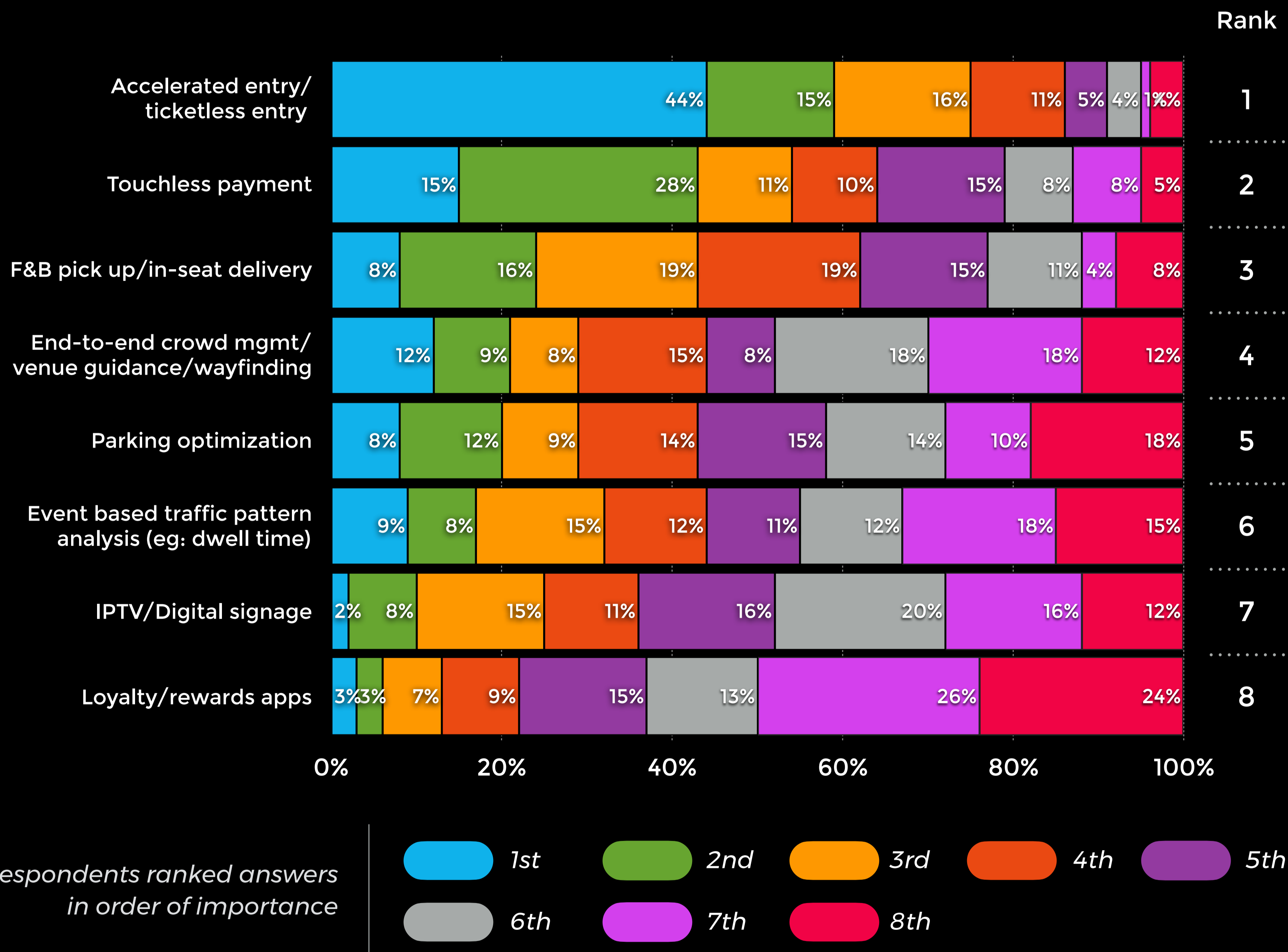
Respondents ranked answers in order of importance



Venues value Covid-proof enhancements like digital ticketing and touch-free concessions to eliminate fan pain points.

SURVEY QUESTION:

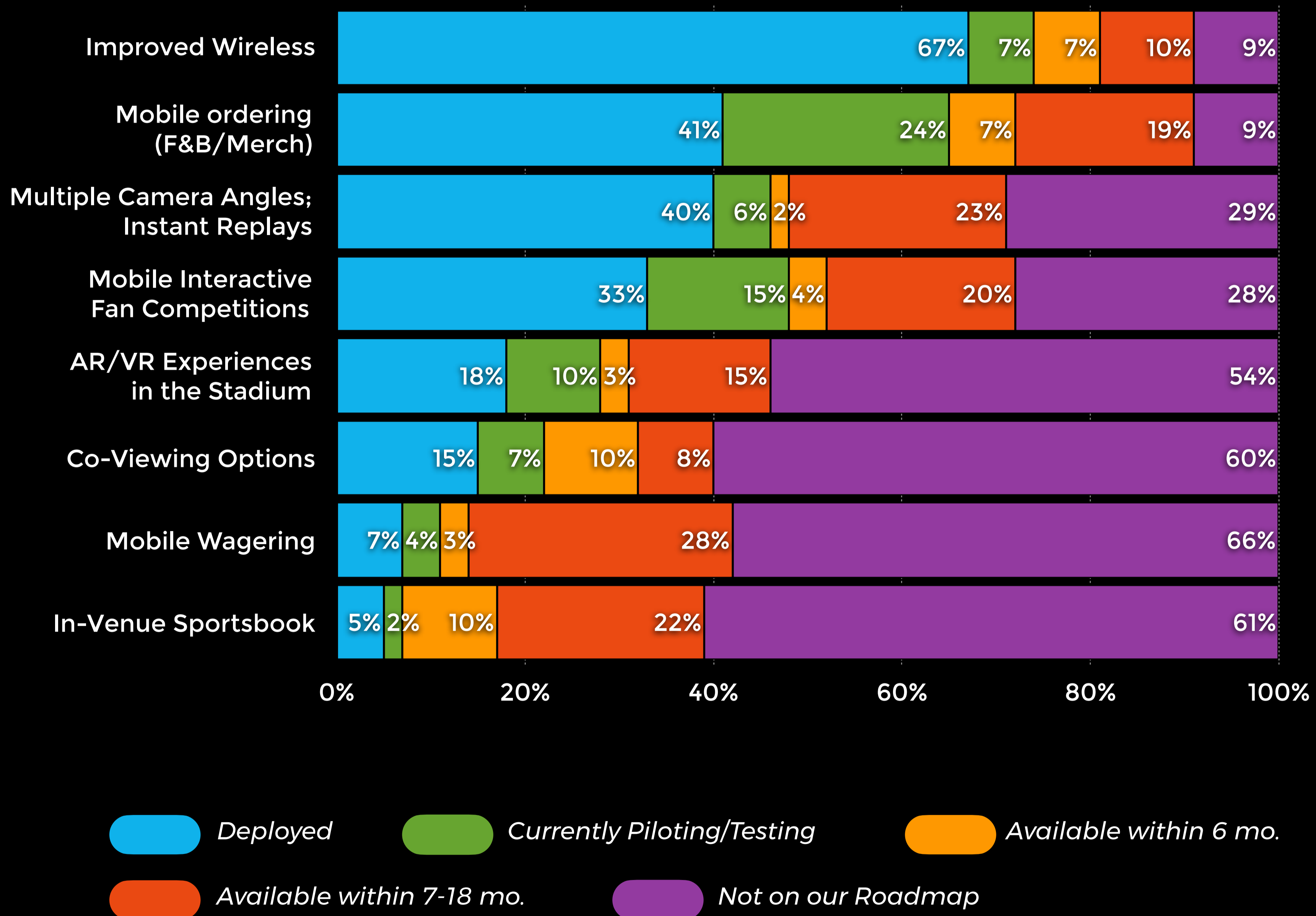
What are the solutions you value most in terms of removing potential pain points for customers?



Venues have embraced enhanced wireless and mobile ordering, while mobile wagering and in-venue sports book options are rare.

SURVEY QUESTION:

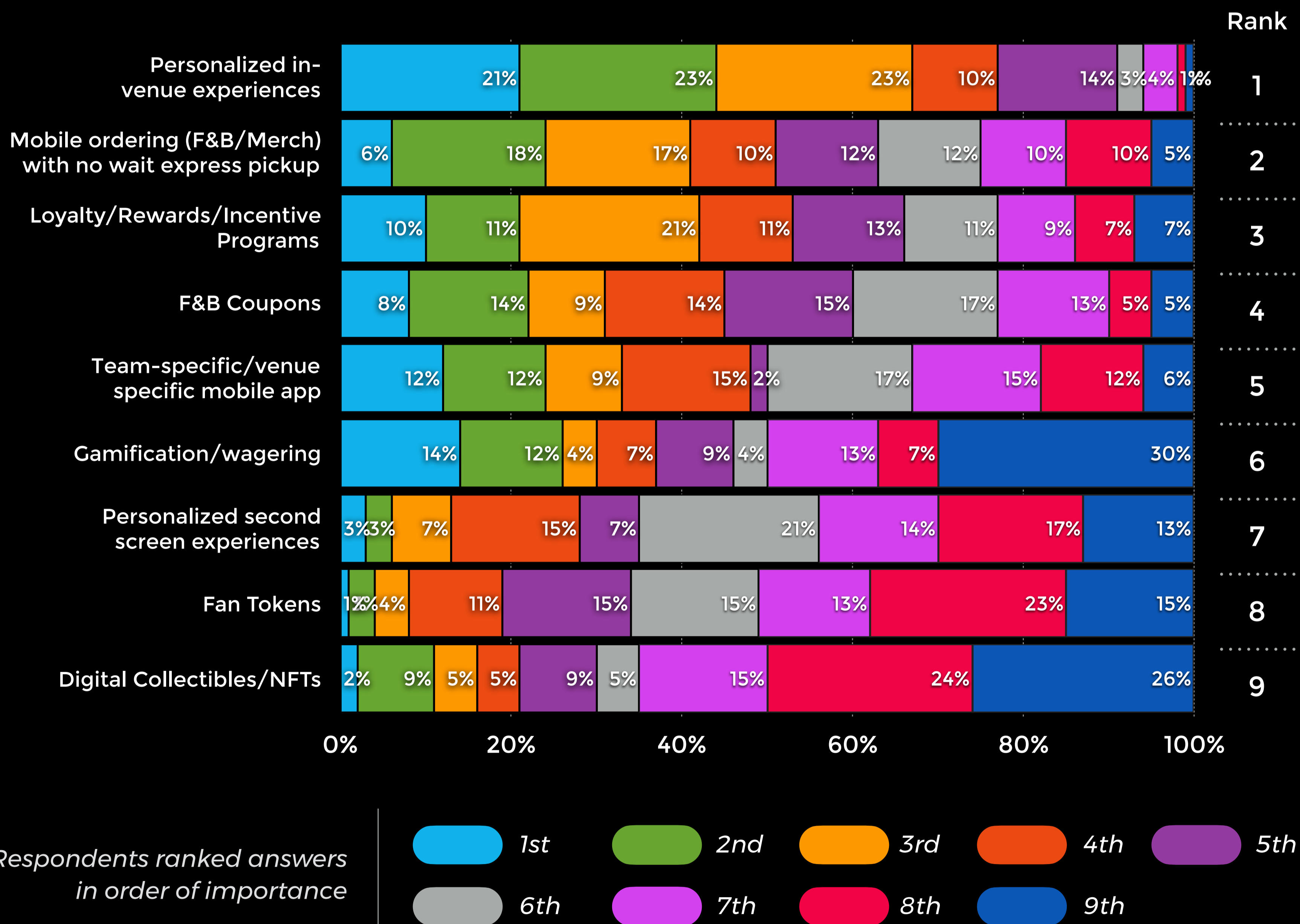
Which of the following in-venue services and/or second screen experiences are you offering to fans?



Venues see personalized experiences and concessions-related offerings as better bets for revenue generation in the short term, over such new ideas as NFTs.

SURVEY QUESTION:

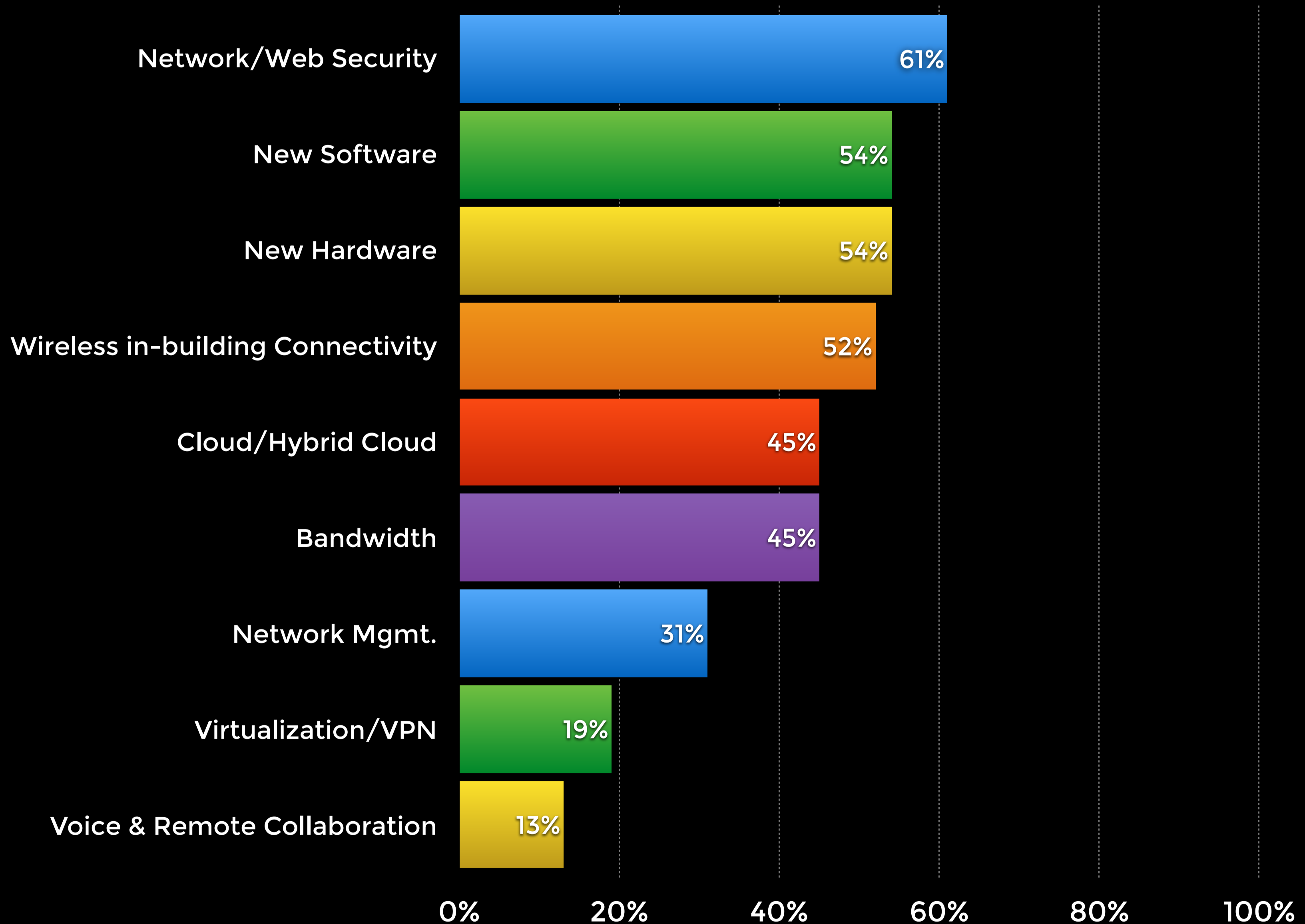
Which of the following fan engagement tactics do you think will have the best chance of generating incremental revenue for your organization?



Better network and web security is the top investment for both supporting growth and reducing operating expenses over the next 18 months.

SURVEY QUESTION:

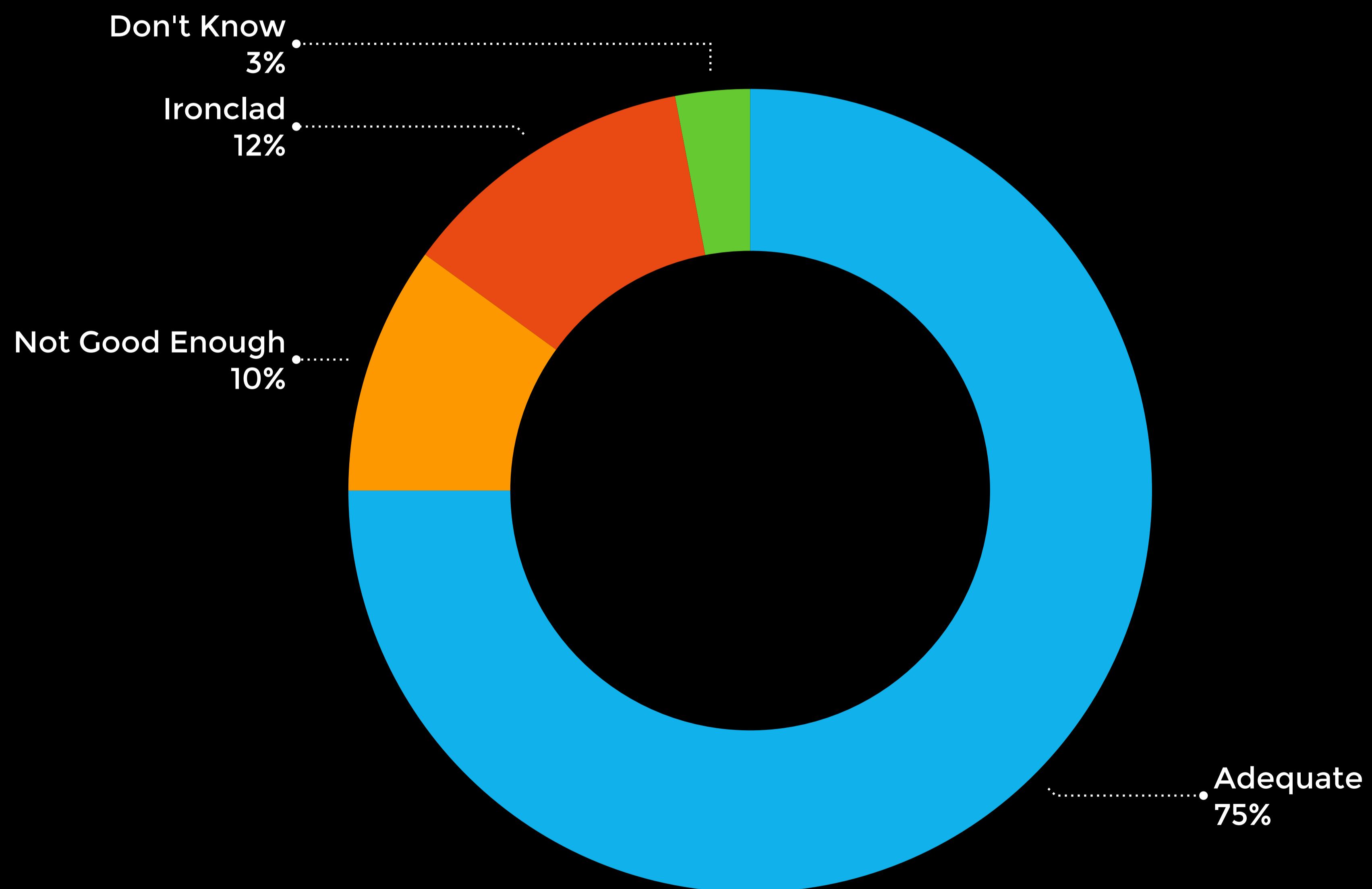
Which areas will you be making changes in your IT infrastructure to support growth or reduce operating costs over the next 12-18 months:



More than 85 percent of respondents see their security as "not good enough" or just "adequate."

SURVEY QUESTION:

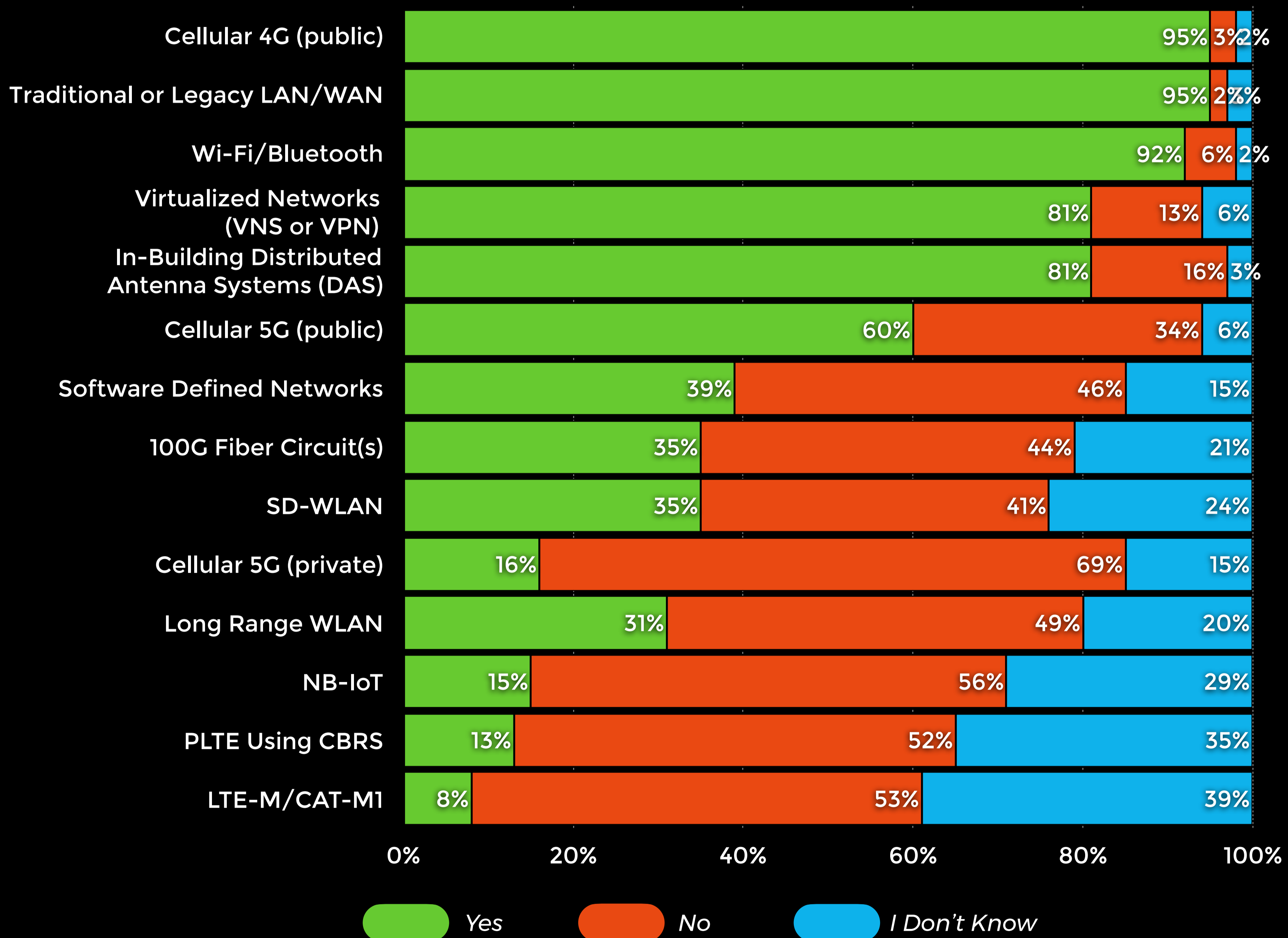
My existing security posture / strategy is:



Venues have made wireless connectivity a priority, with almost every respondent having deployed 4G LTE, Wi-Fi and LAN/WAN infrastructure.

SURVEY QUESTION:

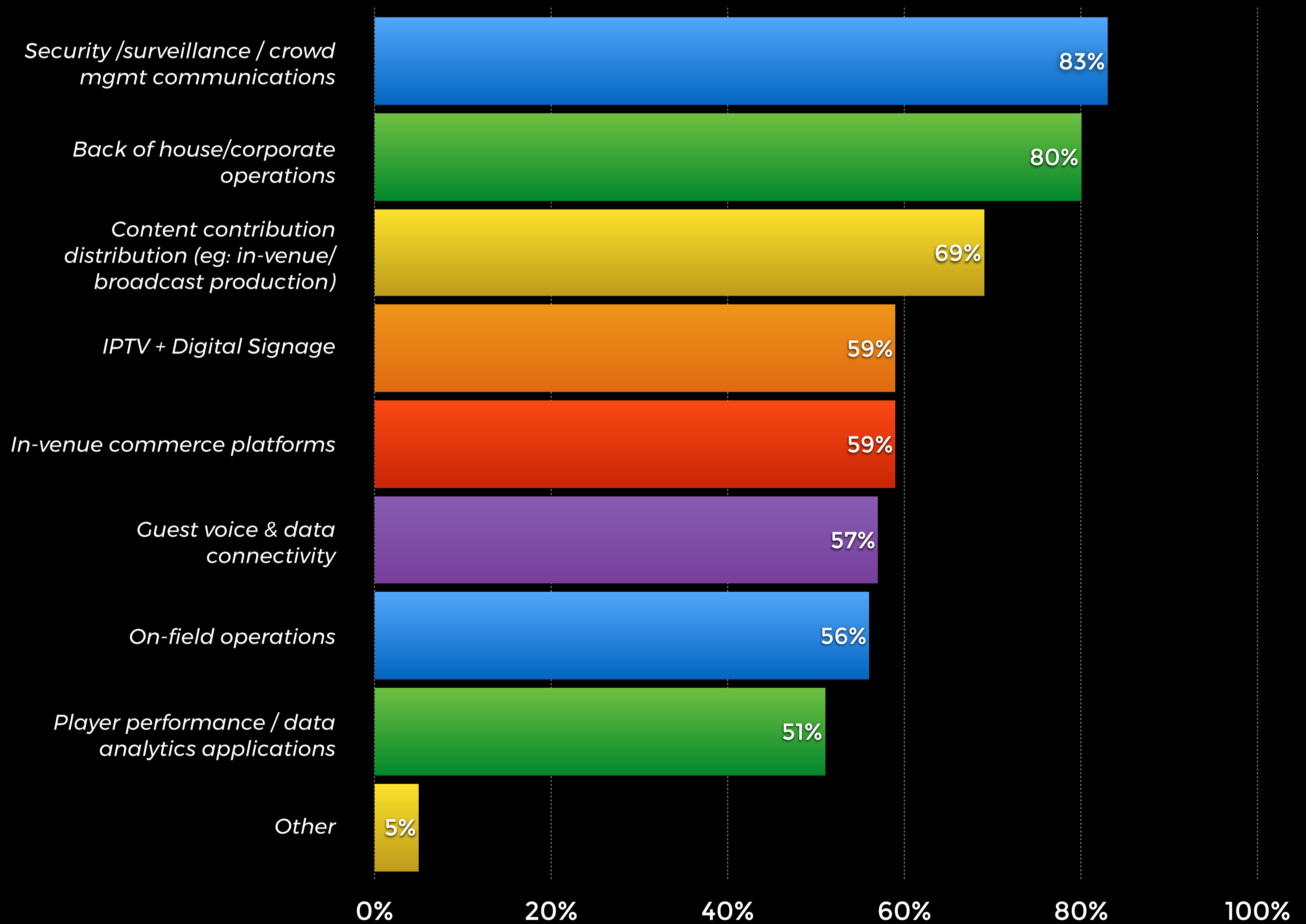
Which wired and wireless capabilities make up your connectivity footprint today?



Network slices are seen as prime ways to provide dedicated, secure bandwidth for separate business functions.

SURVEY QUESTION:

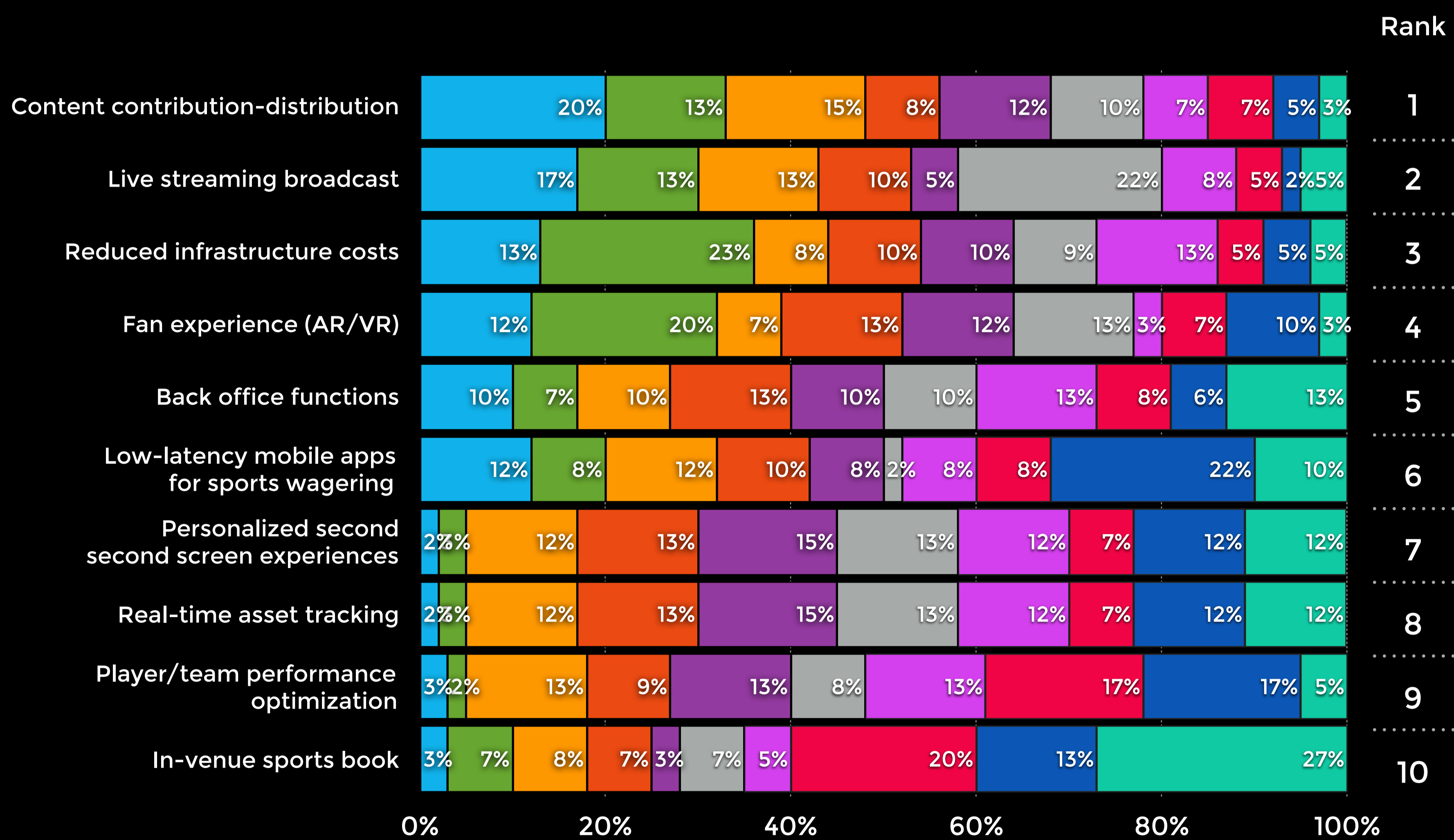
I would like dedicated network slices for which of the following:



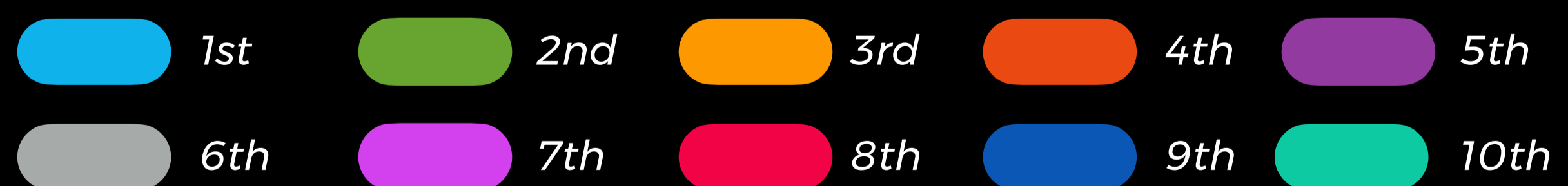
Venues see 5G / Mobile Edge Computing as a prime solution for latency-sensitive operations like content distribution and live streaming.

SURVEY QUESTION:

What aspects of 5G/MEC do you think might have the most impact on your business?



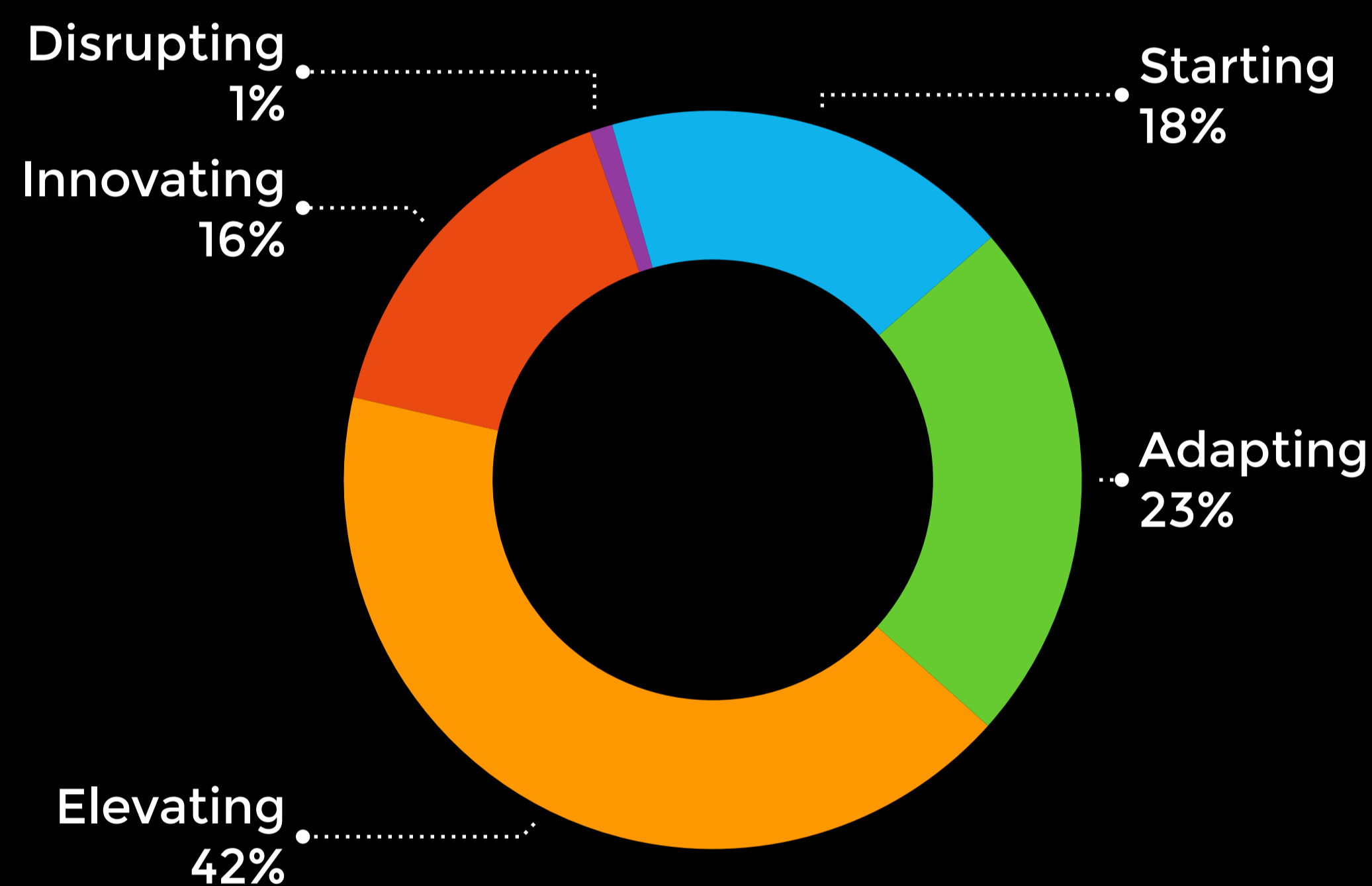
Respondents ranked answers in order of importance



41 percent of venues see themselves as being at the early stages of their digital transformation journey.

SURVEY QUESTION:

Which statement best describes where you are RIGHT NOW on your digital transformation journey:



STARTING: I've listed the outcomes I want to achieve and prioritized the decisions necessary to reach my digital transformation goals. I'm evaluating existing business systems and technology infrastructure to identify gaps

ADAPTING: I've taken 1st steps to actualize my vision. Plan approved, I'm ready to invest in transformation. I'm vetting partners to source solutions that'll enable operational efficiencies, new business opportunities & better customer experiences

ELEVATING: Executing my strategy. Proper infrastructure is in place. I'm seeing ops benefits – getting data from various places in my org & integrating it into centralized systems that provide flexibility, better analytics & faster decision-making

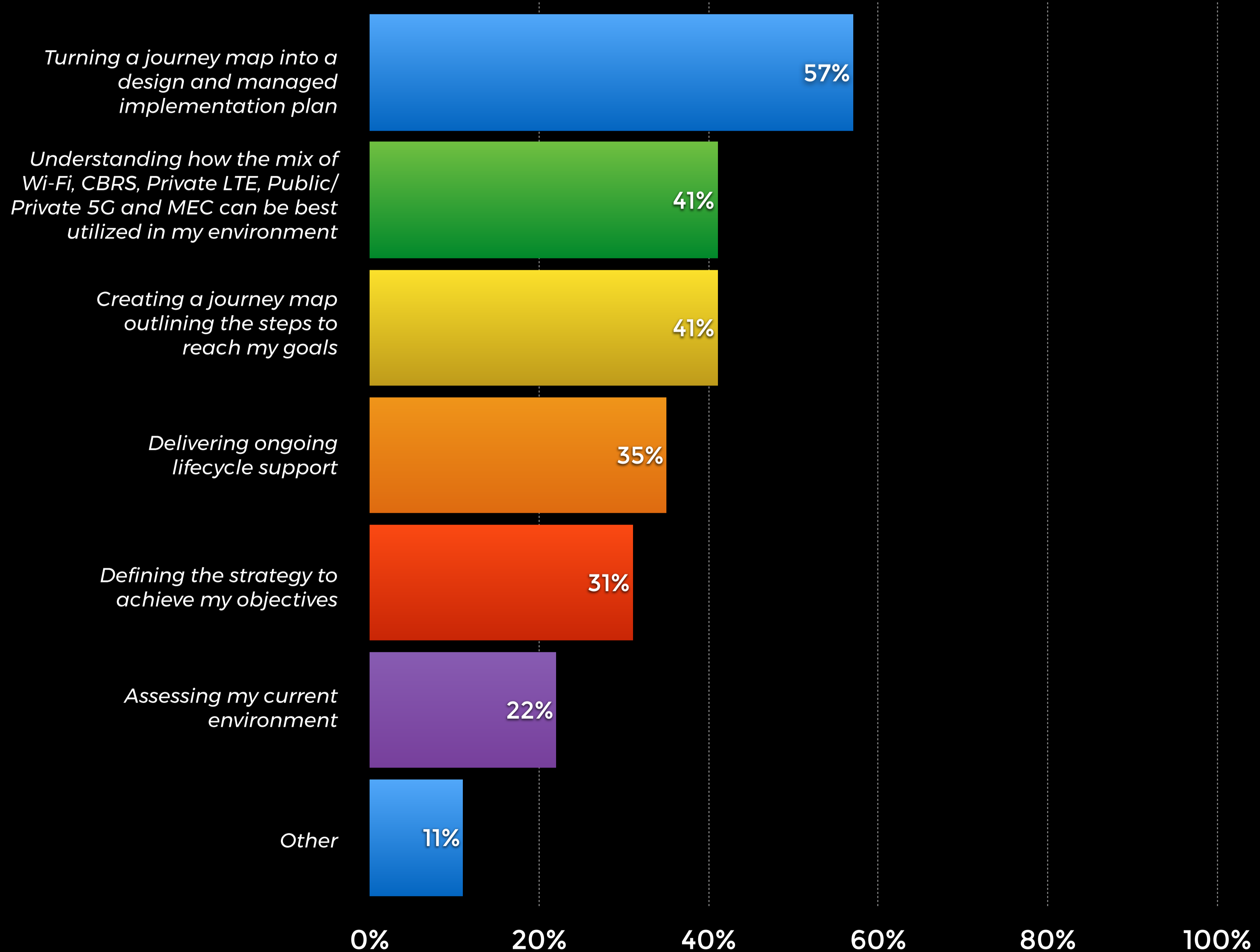
INNOVATING: Deeper down the path of transformation. I can capture/analyze multiple data sources at scale in near real-time, allowing me to identify cost efficiencies, maintain operational agility, enhance security & explore new revenue models

DISRUPTING: I'm at the cutting edge. By adding 5G+MEC to my core infrastructure, I've implemented the latest guest-centric advances like frictionless entry, crowd management, contactless payment & premium, immersive & personalized content

Venues had wide agreement that they still needed assistance with their digital transformation objectives.

SURVEY QUESTION:

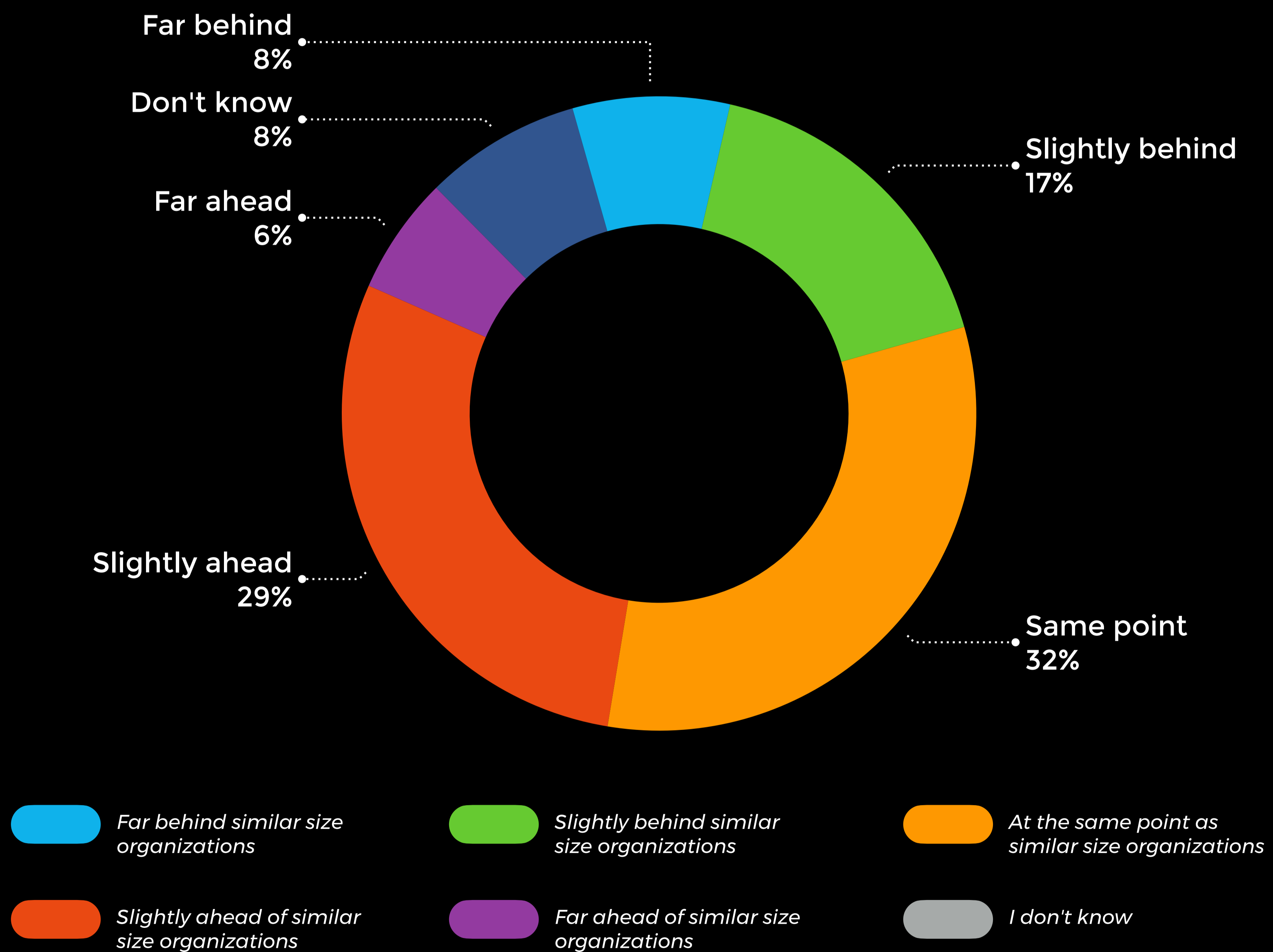
Which areas do you need assistance in order to achieve your digital transformation objectives?



25 percent of venues see themselves as behind their peers in digital transformation execution.

SURVEY QUESTION:

In terms of digital transformation execution I am:



RESEARCH OVERVIEW

KEY TAKEAWAYS

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THANK YOU



FOR MORE INFORMATION

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