

STADIUM

TECH REPORT



Stadium Connectivity Outlook Survey

Results and Analysis

November 2024

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

RESEARCH OVERVIEW

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Stadium Tech Report conducted the 2024 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 and technology deployments, including:

- What were their investment priorities in connectivity and related technologies
- What fan experience pain points could connectivity and other related technologies 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

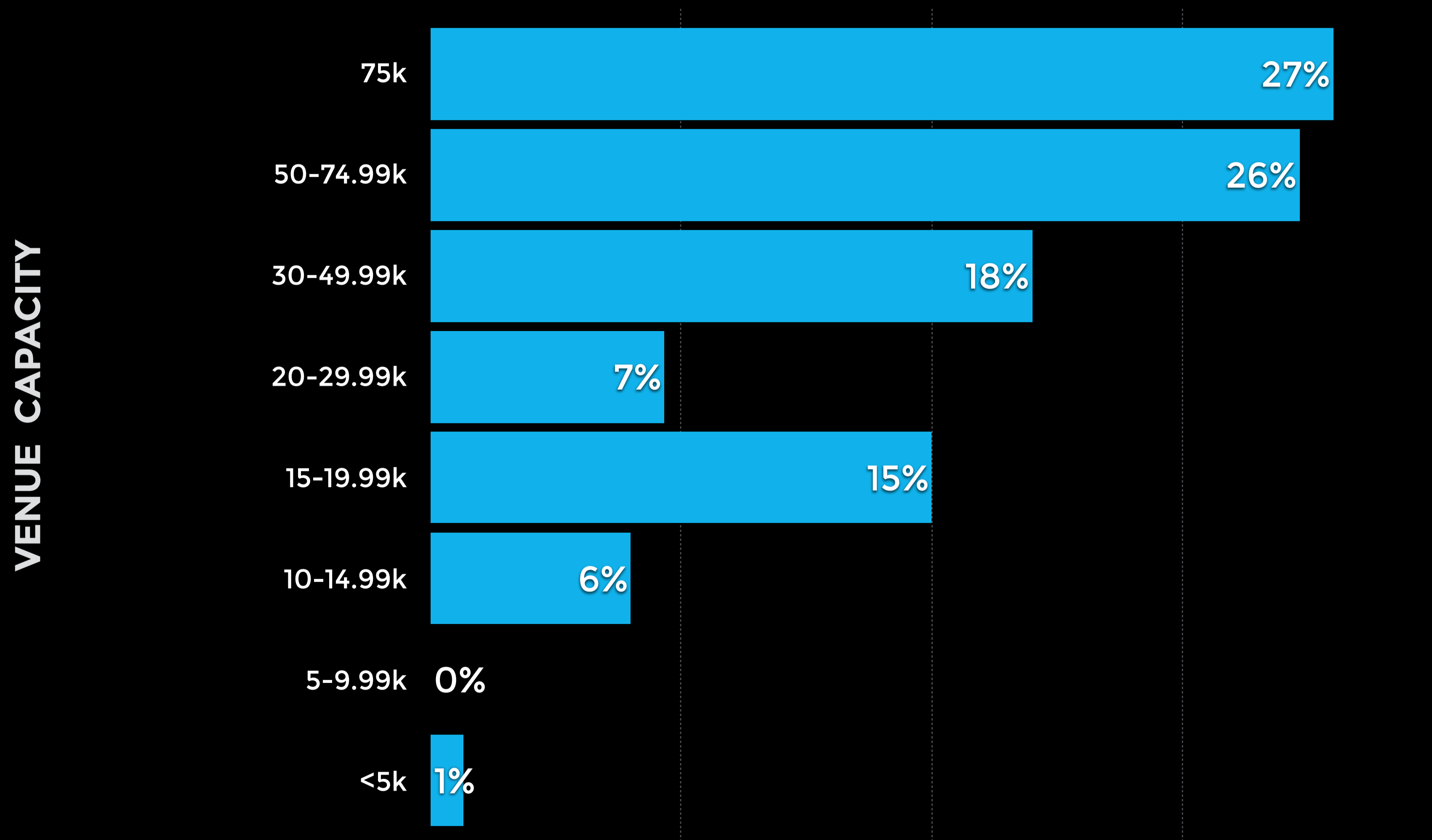
- The survey was conducted online by Stadium Tech Report during August and September, 2024, targeting our reader audience of stadium technology professionals. This includes professionals working directly for teams, schools and venues, as well as professional consultants contracted to assist venues in their technology deployments.
- This was a blind data collection process. Verizon was not identified as the co-sponsor of the survey.



RESEARCH OVERVIEW

VENUE PROFILES

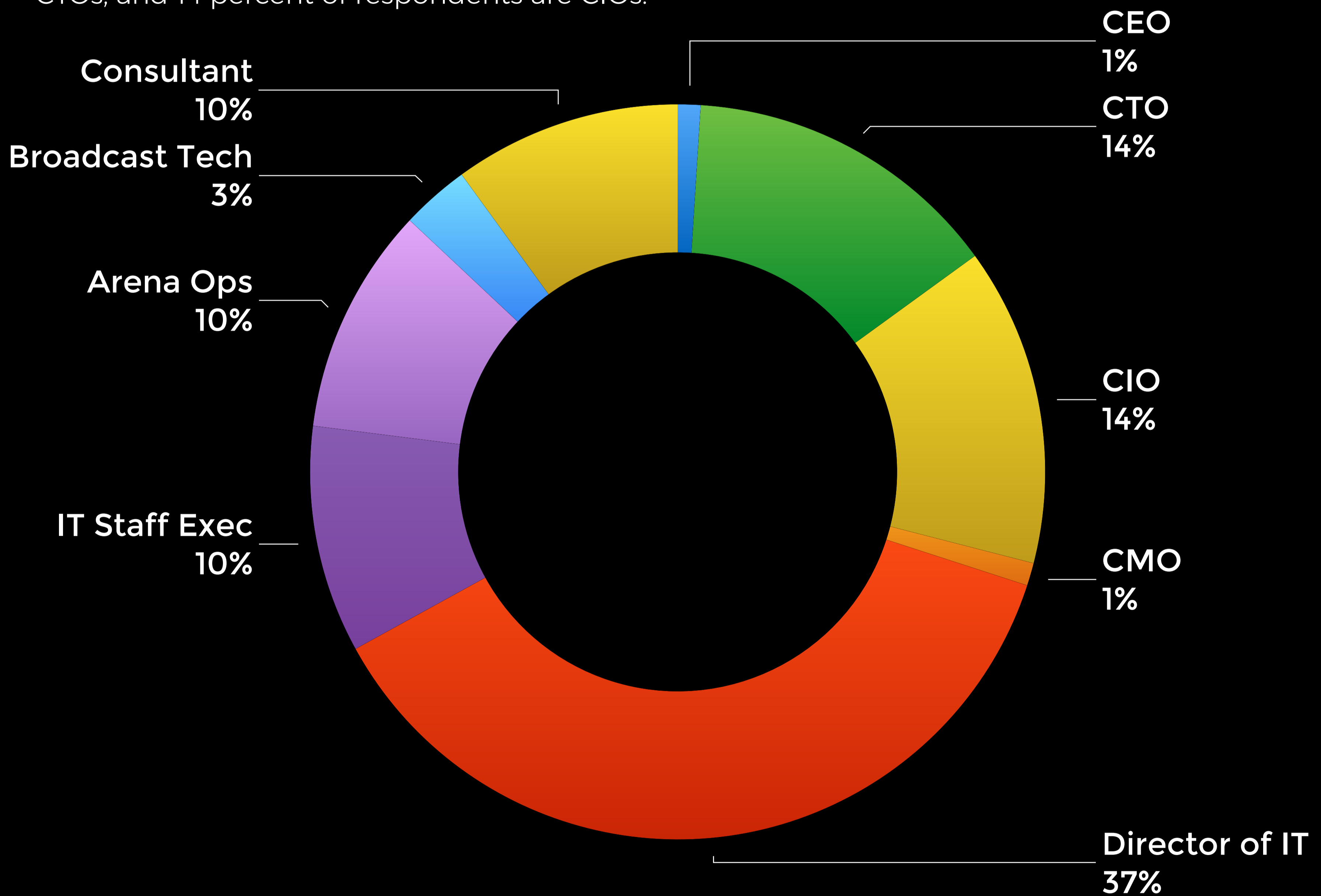
Respondents came from all corners of the stadium and arena world, including representatives from the NFL, MLB, NHL, NBA and MLS U.S. professional leagues. There were also respondents from a wide range of major U.S. universities, as well as from smaller schools and smaller venues, like concert halls and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



RESEARCH OVERVIEW

RESPONDENT PROFILES

Approximately 37 percent of respondents are directors of IT; 14 percent of respondents are CTOs, and 14 percent of respondents are CIOs.



RESEARCH OVERVIEW

KEY TAKEAWAYS

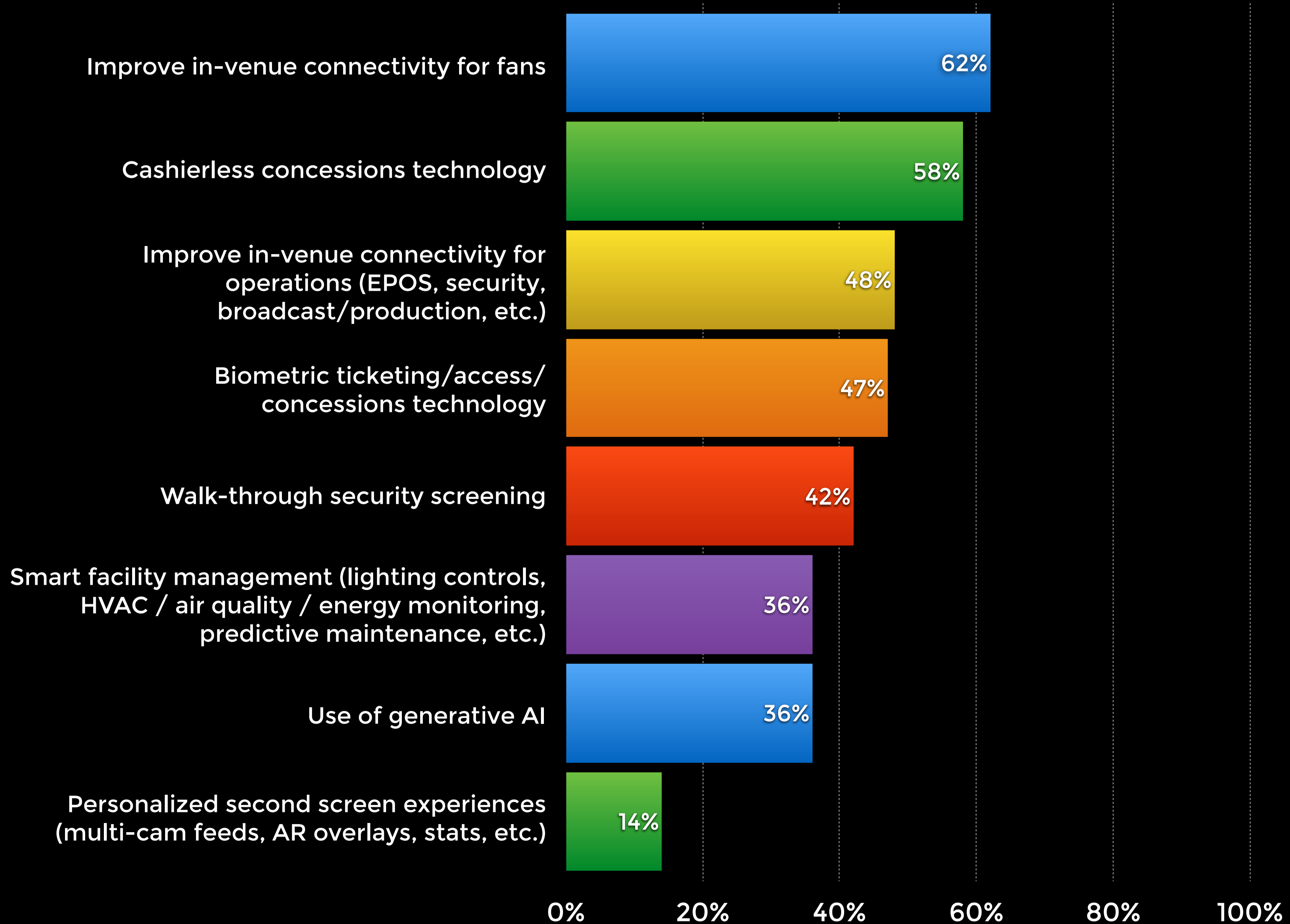
1. Improved wireless connectivity for fans and venue operations is the top initiative for venues in 2025.
2. Cashierless concessions, biometric solutions and walk-through security scanners are tops on venues' technology deployment lists, while generative AI is also a growing focus.
3. Lowering operating costs and increasing revenues while paying attention to budgets are the combined top challenges for most venue respondents.
4. Venues continue to explore in-house use cases for private 5G, with venue business solutions and on-field operations top of mind.
5. More venues believe they are right on track when it comes to their overall security and their digital transformation strategy.

DETAILED FINDINGS

Improving in-venue connectivity for fans and cashierless concessions technology are at top of mind for venues

SURVEY QUESTION:

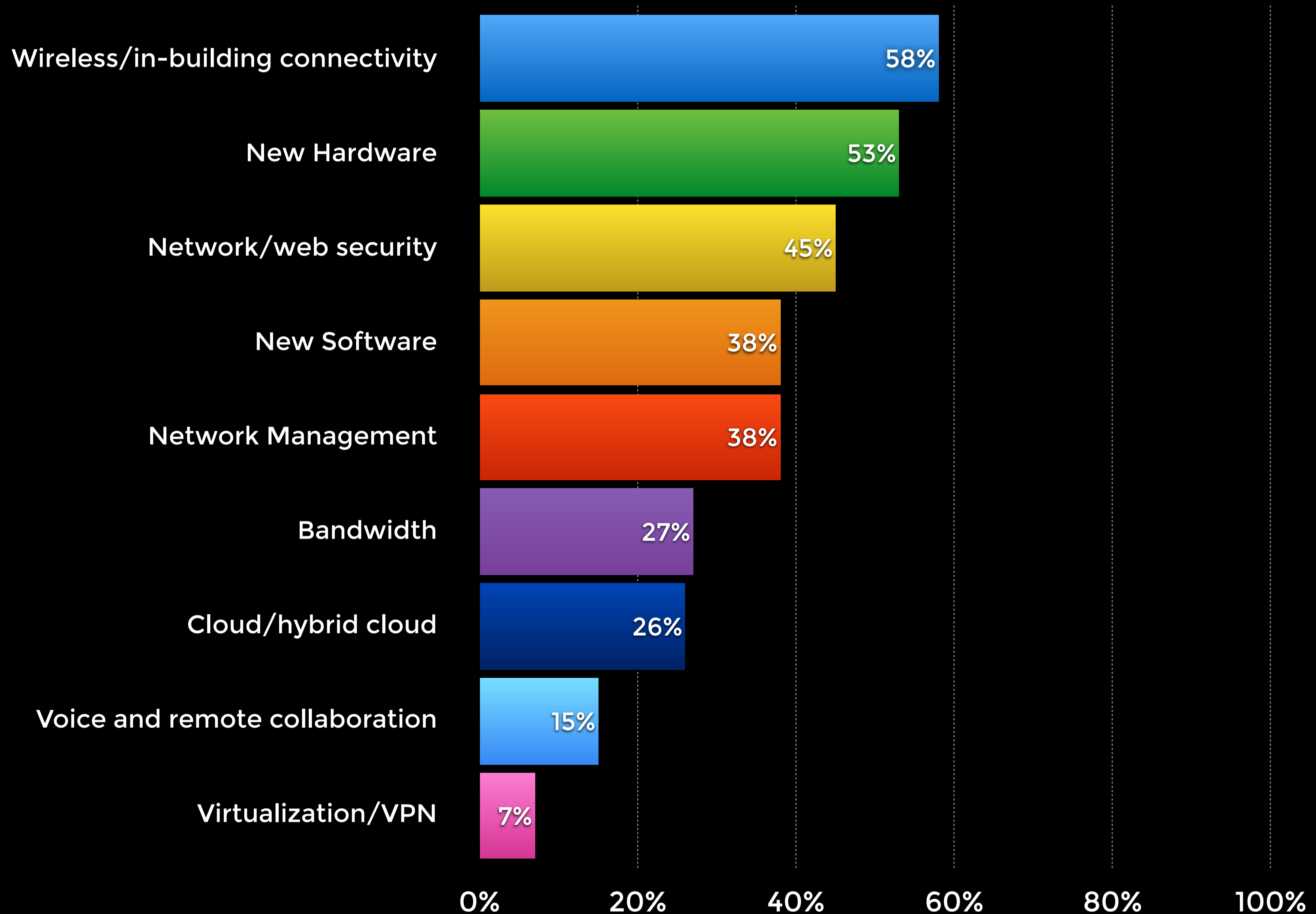
Which initiatives are on your roadmap for 2025? Check all that apply.



Wireless and in-building connectivity leads the list of planned IT infrastructure investments

SURVEY QUESTION:

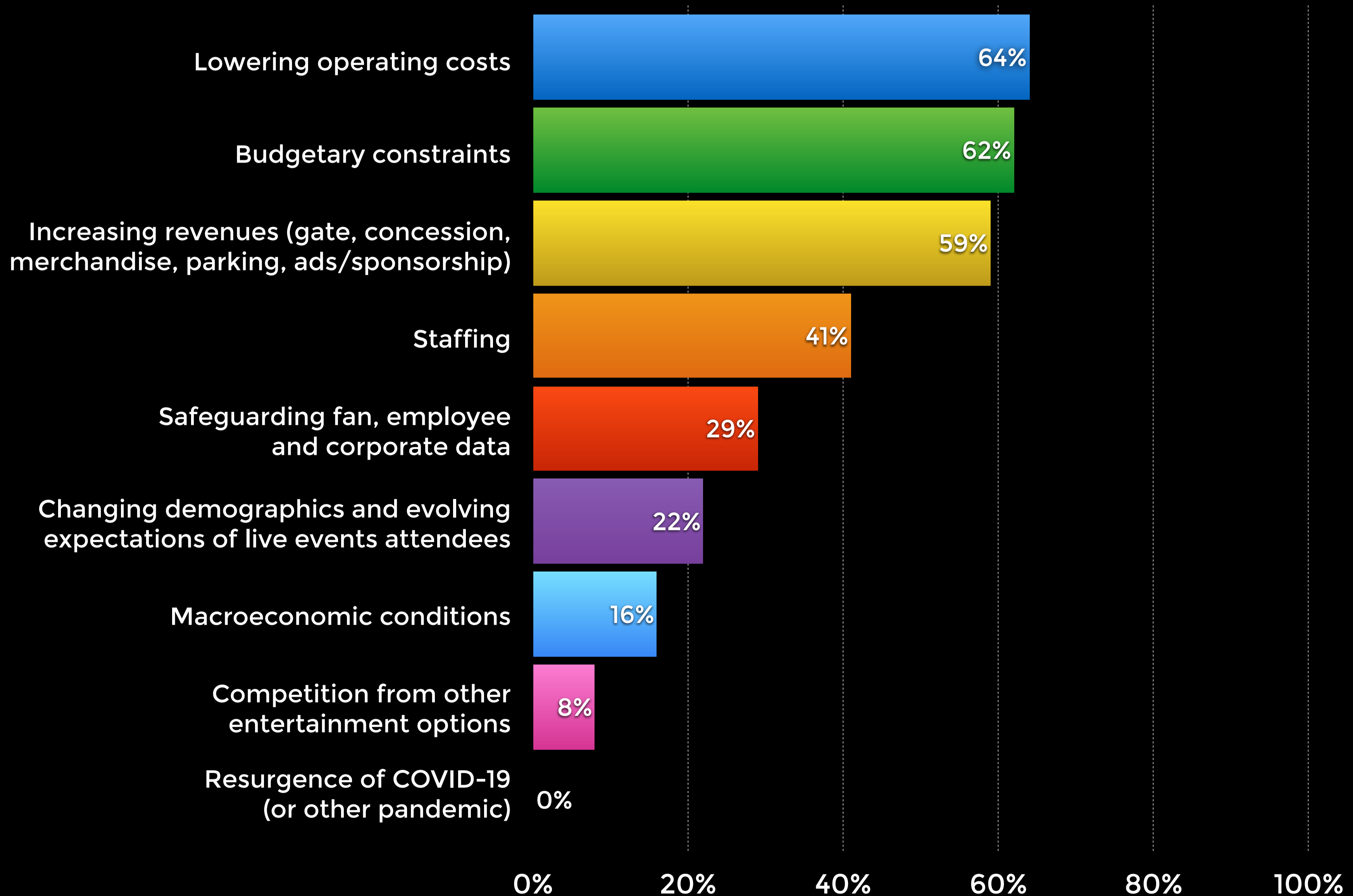
Which areas will you be making changes in your IT infrastructure to support growth or reduce operating costs over the next 12-18 months?
Check all that apply.



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

SURVEY QUESTION:

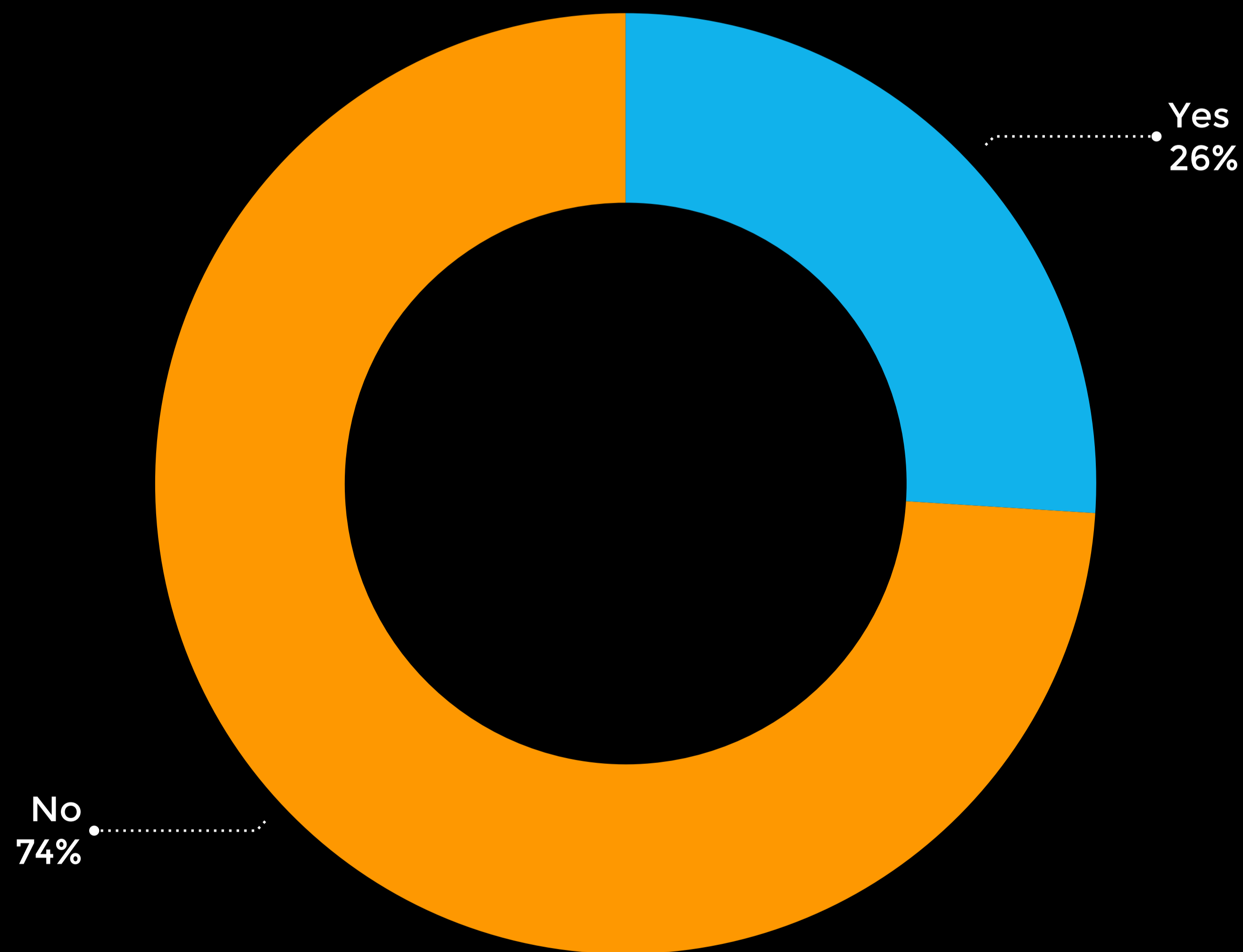
What are the biggest challenges you face in the next 12 months? Check all that apply.



Most venues report no significant issues with ticketing or security delays

SURVEY QUESTION:

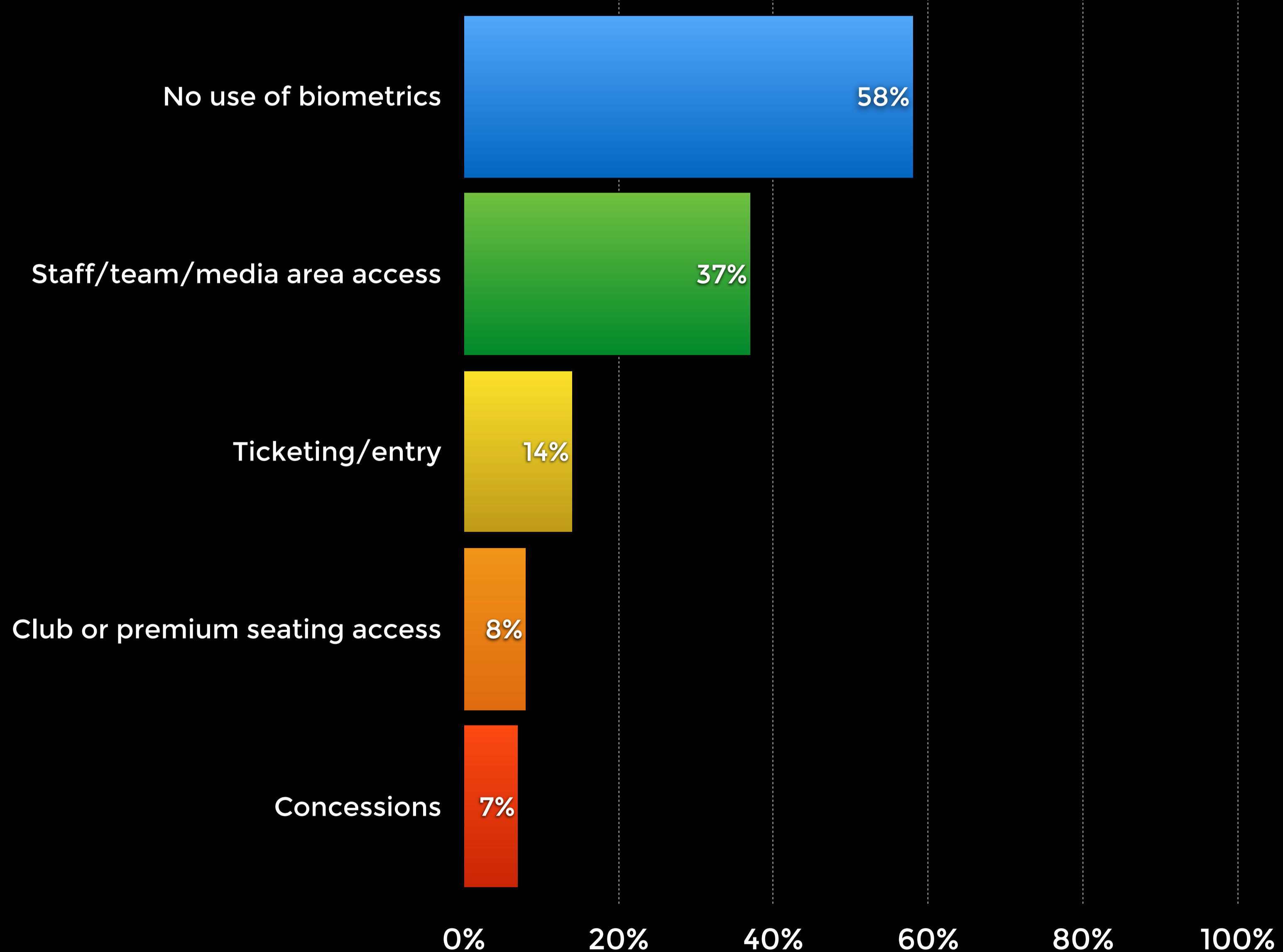
At any event in the past year, did your venue have a significant issue with delays or backups due to ticketing and/or security screening?



Biometric authentication technology making inroads for in-house access as well as fan ticketing

SURVEY QUESTION:

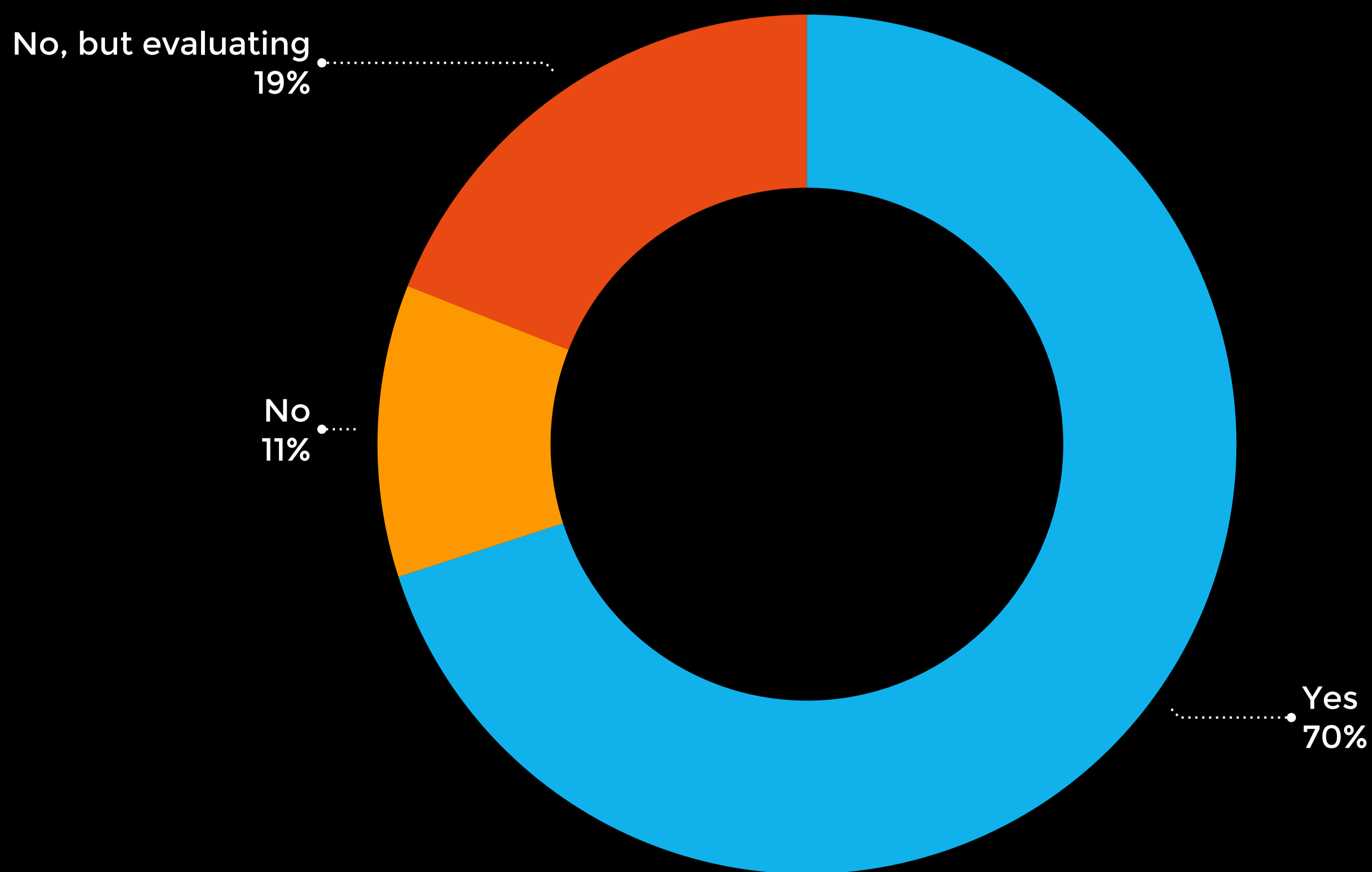
Does your venue use facial or other biometric authentication technology for any of the following functions? Check all that apply.



Walk-through security screening is now widely adopted by venues

SURVEY QUESTION:

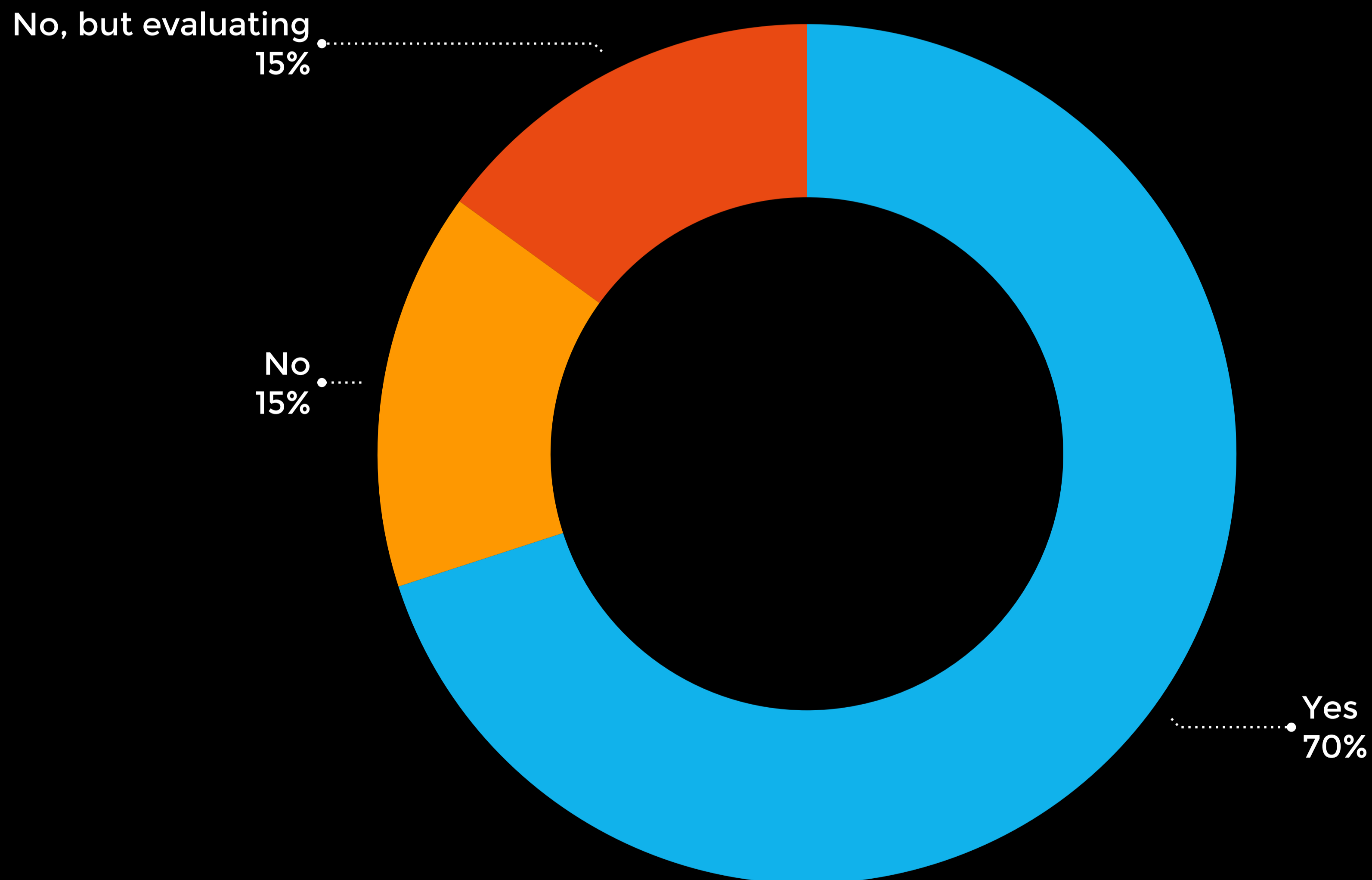
Does your venue have walk-through security screening?



Cashierless concession technology growth levels off as most venues have already adopted it in some form

SURVEY QUESTION:

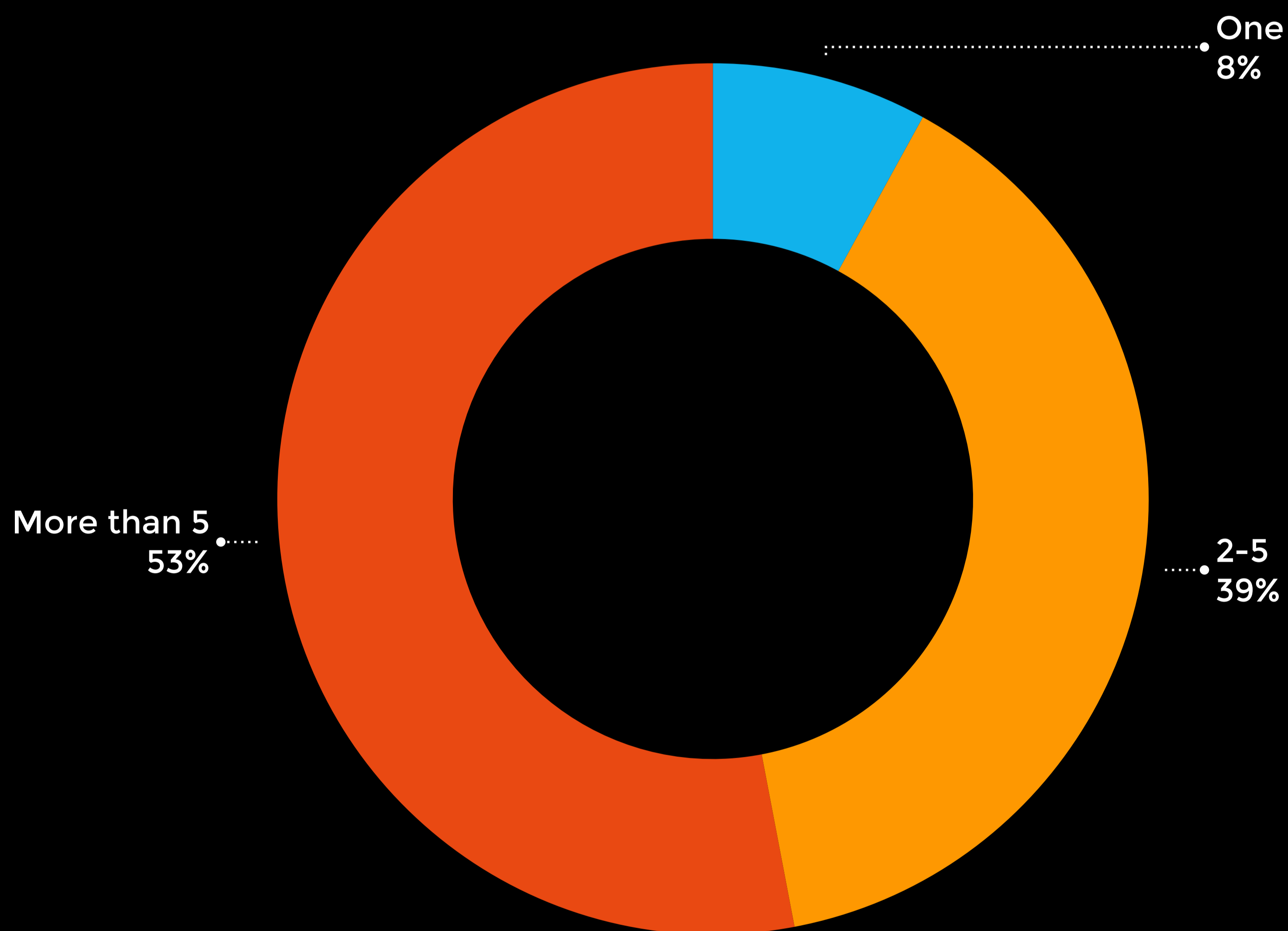
Does your venue have concession stands with cashierless checkout technology?



More than 50 percent of venues have five or more cashierless checkout concession stands

SURVEY QUESTION:

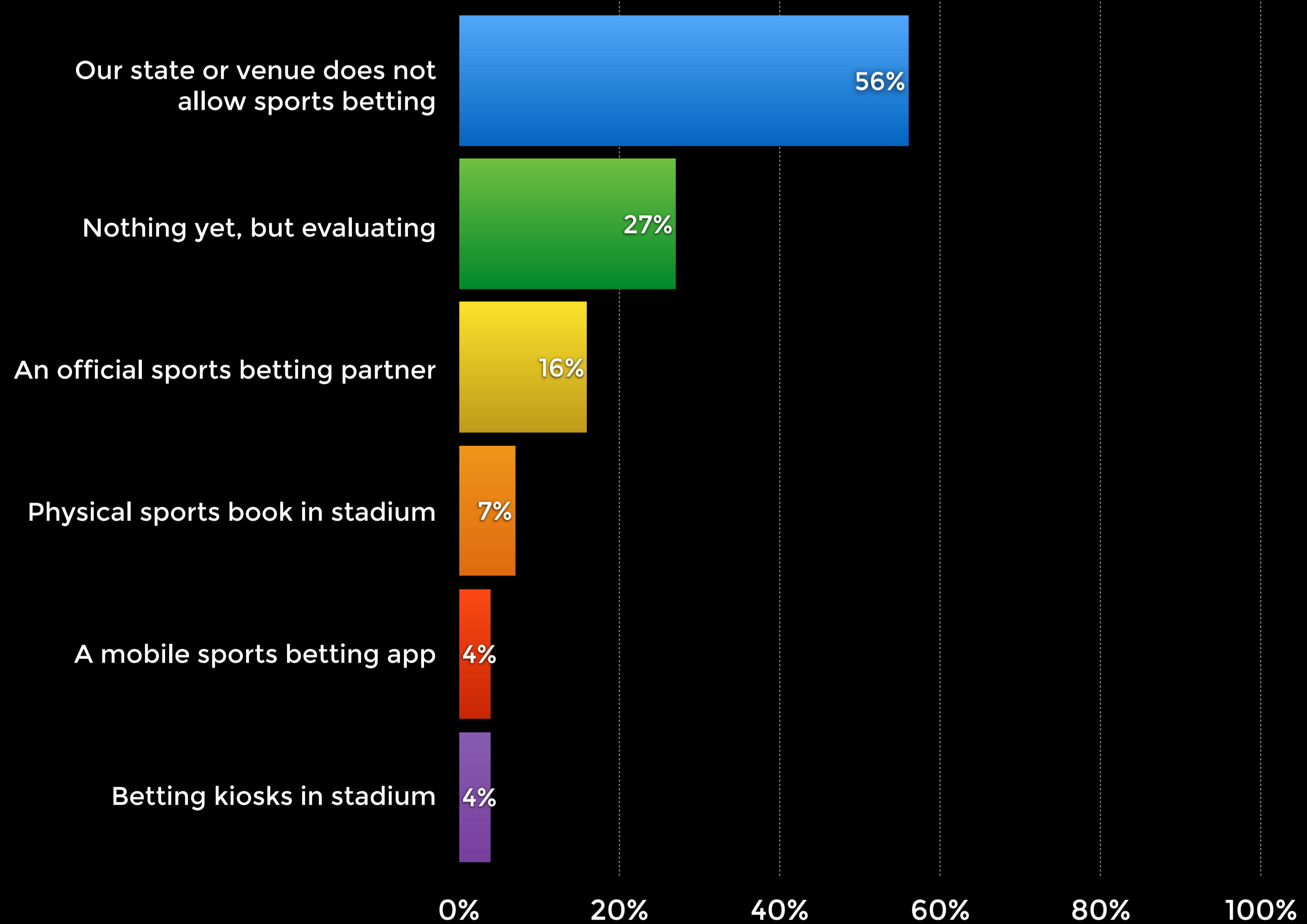
If yes, how many cashierless checkout concession stands does your venue have?



Most venues are still not permitted to host in-venue sports betting

SURVEY QUESTION:

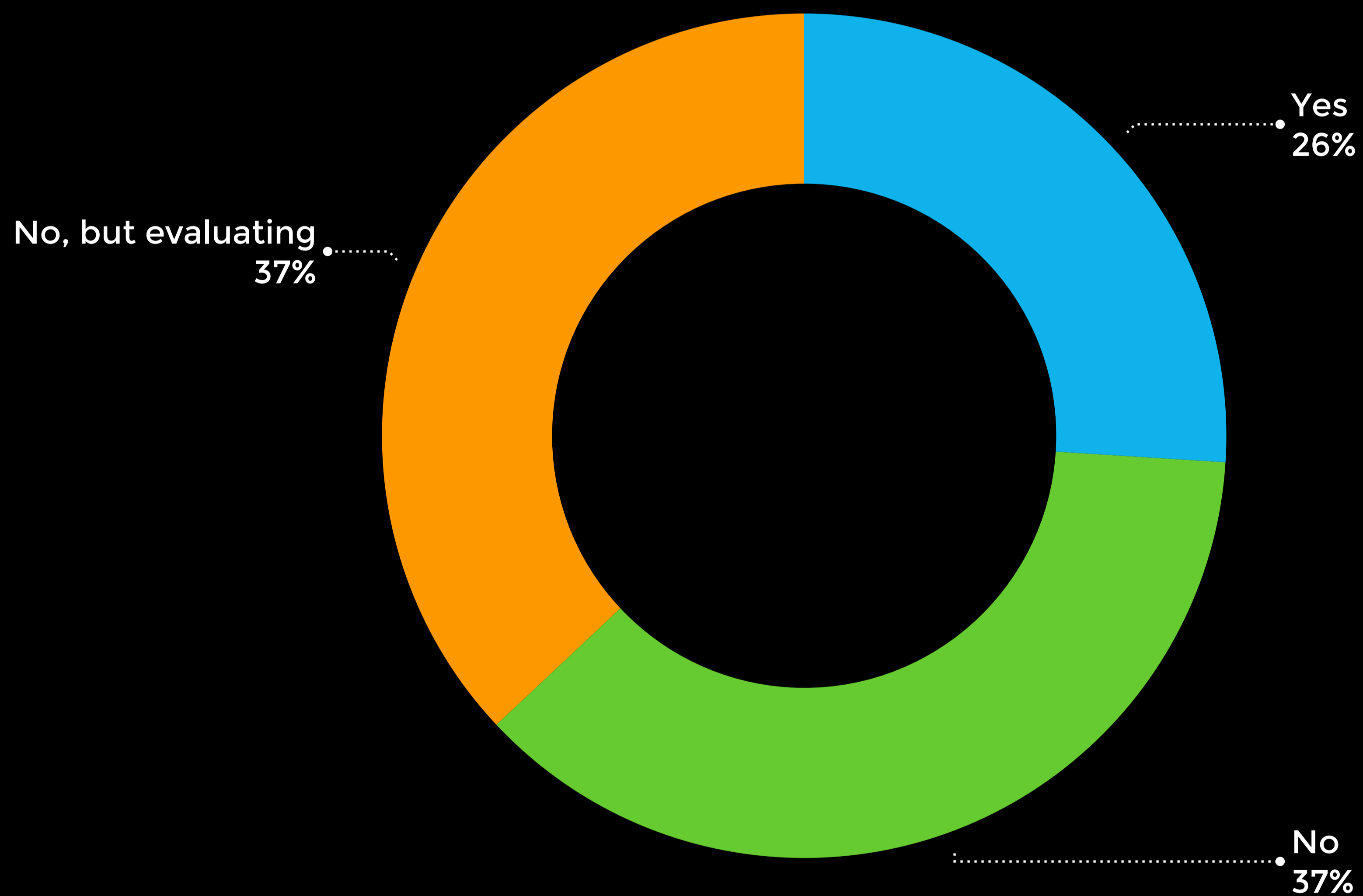
Does your venue have (Check all that apply):



More than a quarter of responding venues are already using generative AI in some capacity

SURVEY QUESTION:

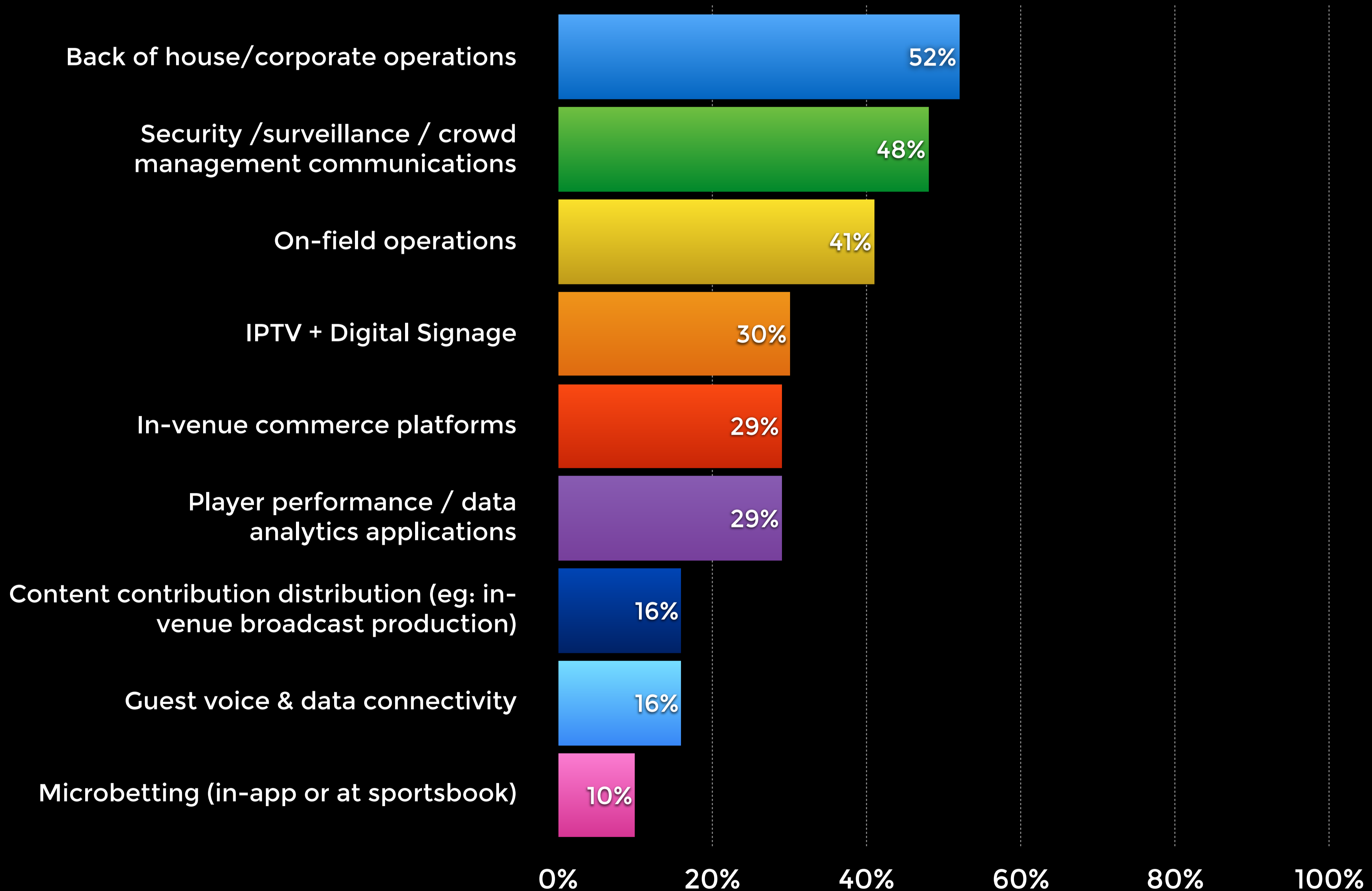
Is your venue using generative AI technology in any capacity?



Just more than half of reporting venues cite interest in using private 5G for back of house operations and security communications

SURVEY QUESTION:

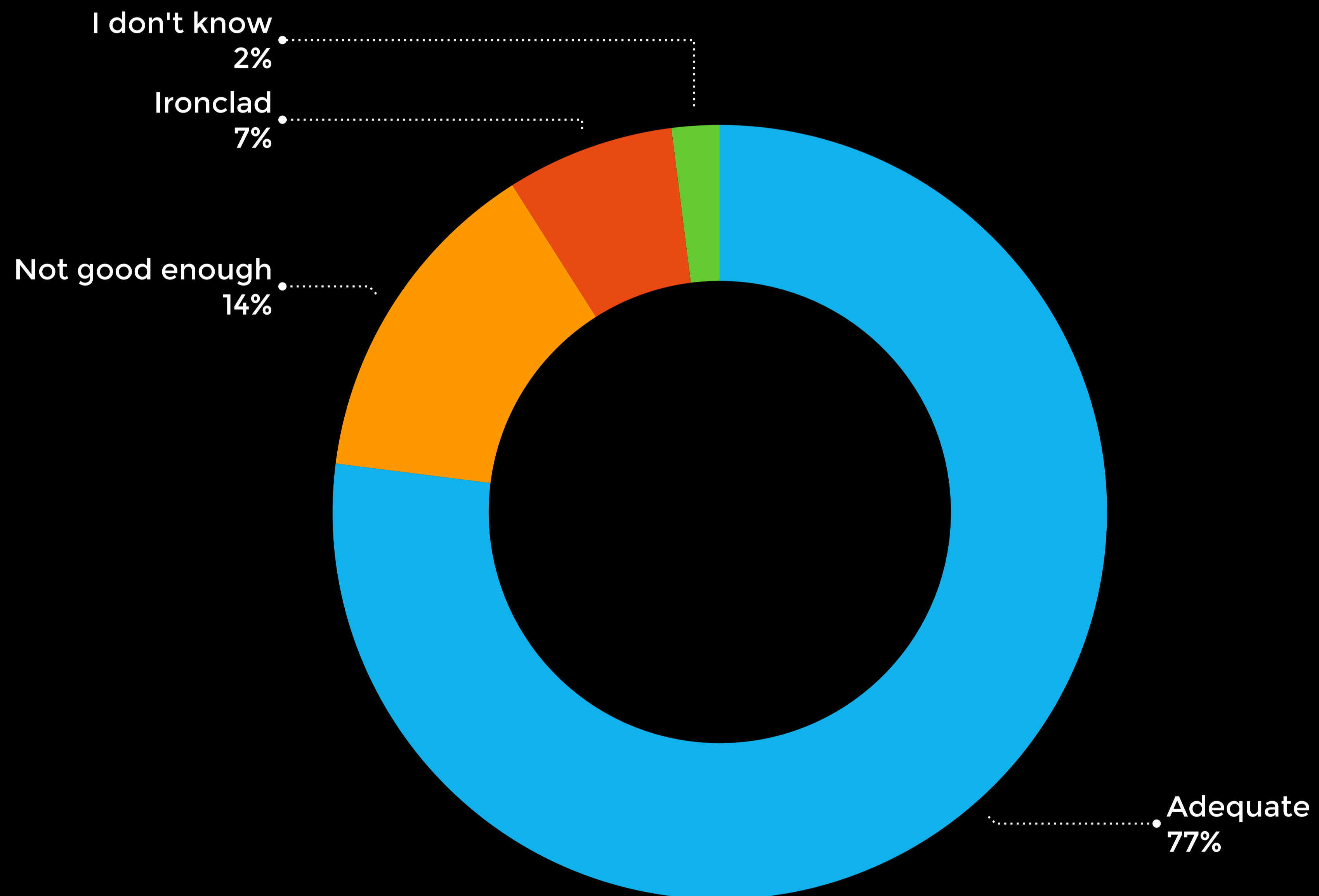
With private 5G, you can isolate a portion of the bandwidth and dedicate it to a specific workflow. Which workflows would you use it for? Check all that apply.



Ten percent more venues say they feel their security posture is 'adequate' than in 2023

SURVEY QUESTION:

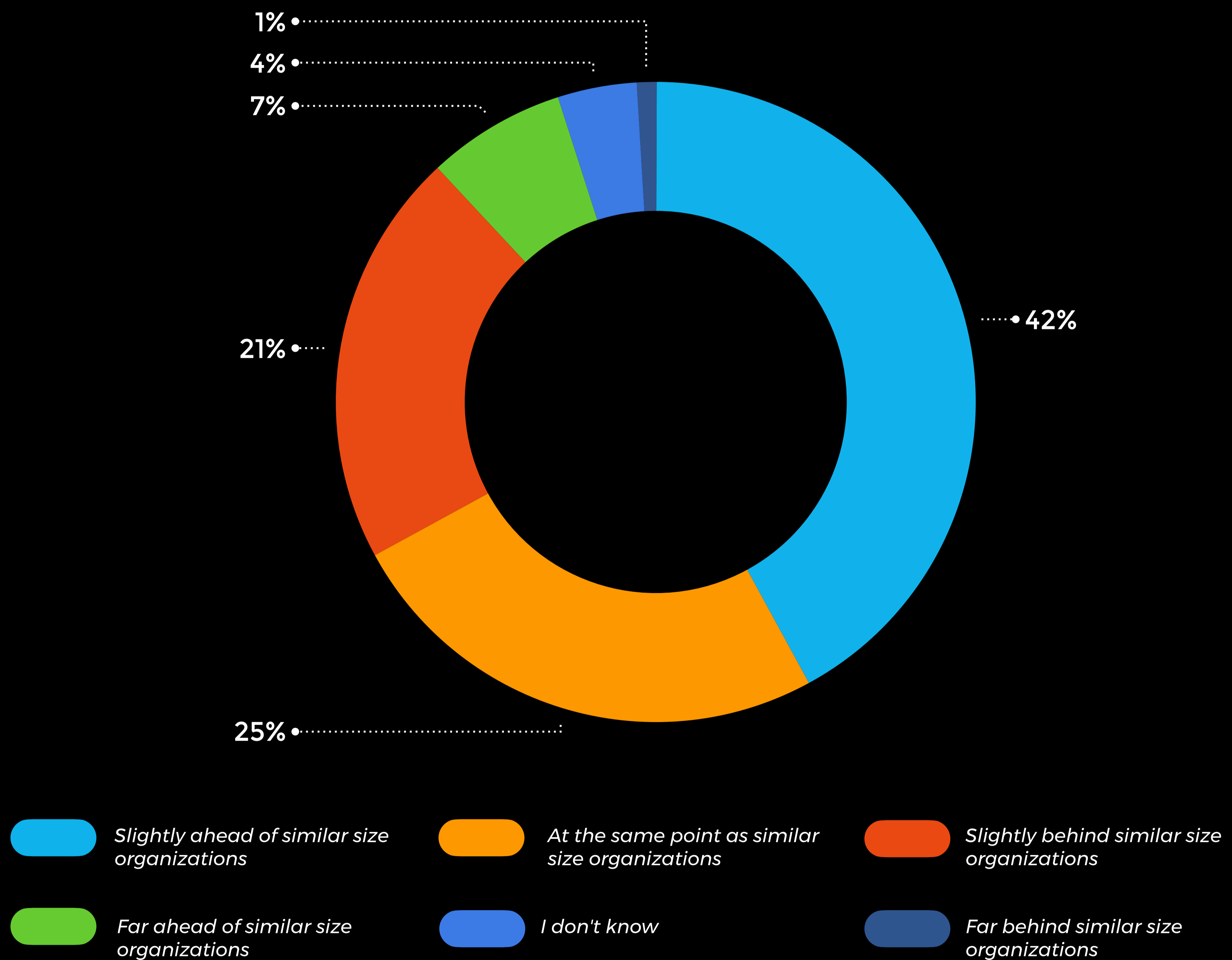
My existing security posture / strategy is:



Respondents who feel their digital transformation execution is slightly ahead of other organizations of similar size grew 7 percent from 2023

SURVEY QUESTION:

In terms of digital transformation execution our venue is:



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THANK YOU



FOR MORE INFORMATION

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