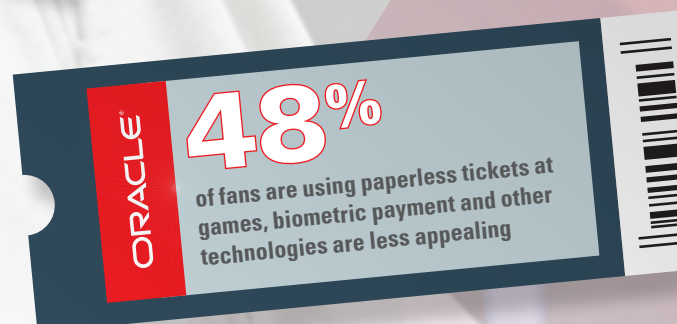
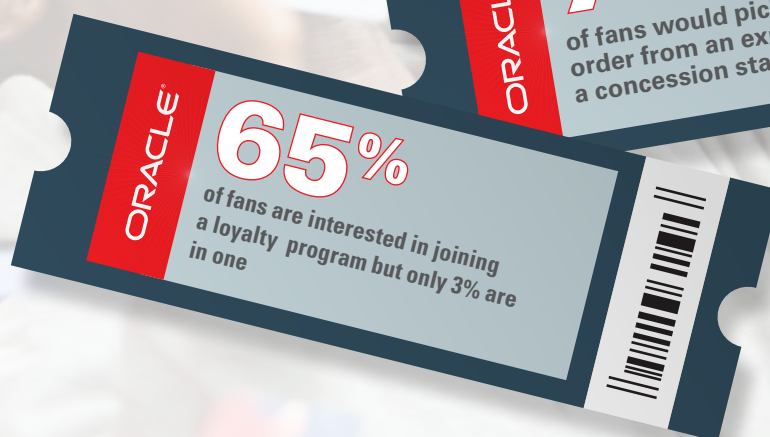
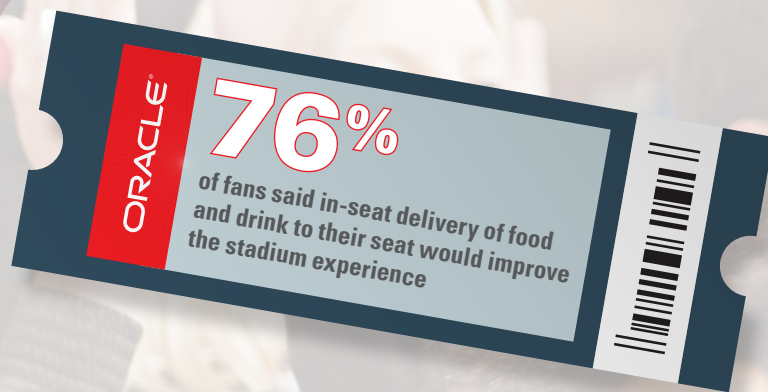
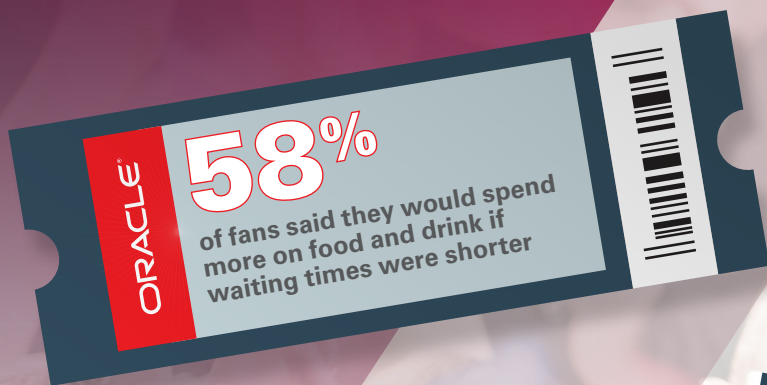
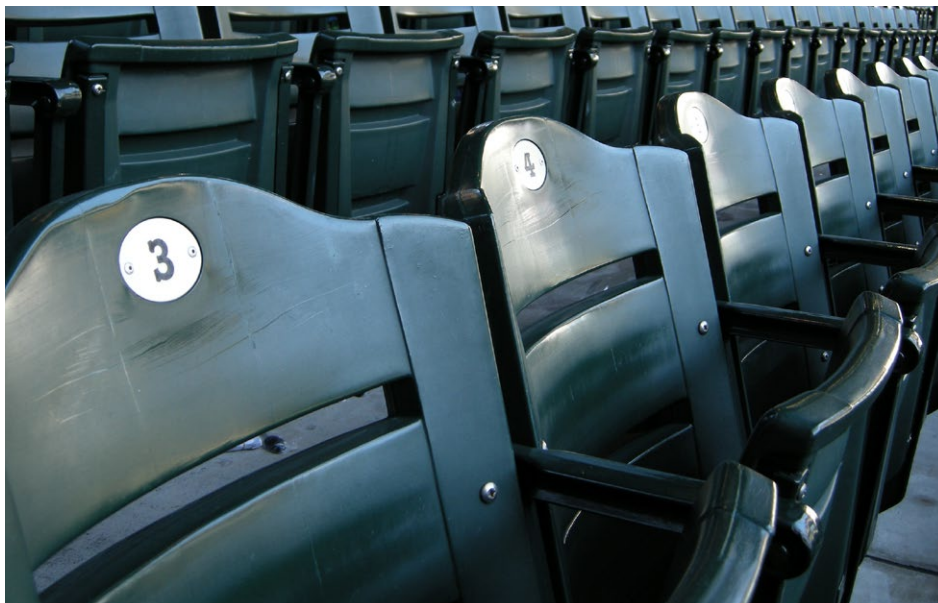


STADIUM OF THE FUTURE

The Next Generation of Game Day Technology







Methodology

Fans from five countries across a number of sports were surveyed for this report:

- Australia (Australian Rules Football)
- Canada (Ice Hockey)
- Germany (Soccer)
- UK (Soccer)
- US (MLB, NFL, Soccer, NHL)

The respondents all met the following criteria:

- Avid fan of the target sport
- Attended at least one live event of the target sport in the last 12 months

What Is the Stadium of the Future?

Technology is changing every aspect of sport, and the game day experience for fans is no exception. Stadiums are striving to provide a greater spectacle at live events, with more entertainment and enhanced enjoyment of the game. Food and beverage is a critical part of this; 94% of sports fans say that they buy food and drink at a game at least occasionally, making it significant both for fan satisfaction and for revenue generation.

So, what do fans want from their game day experience?

- 1. To enjoy food and drink at the stadium:** 72% of US fans always or usually purchase food at a game, while 76% always or usually buy a beverage, spending an average total of \$42 per game.
- 2. To stay in their seats:** Nearly 30% of fans globally ranked being able to stay in their seat as the most important way to improve the food and beverage experience at the stadium, closely followed by faster transaction times.
- 3. Shorter lines and wait times:** Fans value their time at games, and are willing to pay a premium for it. 59% of fans would spend more on food and beverage if their wait time were to be cut in half.
- 4. Easier ordering options:** Fans are willing to use new ordering options. 68% were very interested in using a mobile application to order food and beverage, and 63% said they would use self-service kiosk ordering.
- 5. Futuristic technology that doesn't disrupt the game:** Fans are already using new technology, like paperless tickets and contactless payment methods, but are less interested in technology that wouldn't enhance their game day experience. For example, only 5% of fans globally were more interested in receiving an order from a robot than a human.
- 6. Loyalty rewards:** 63% of fans globally are interested in joining a loyalty rewards program, but less than 3% actually participate in one.



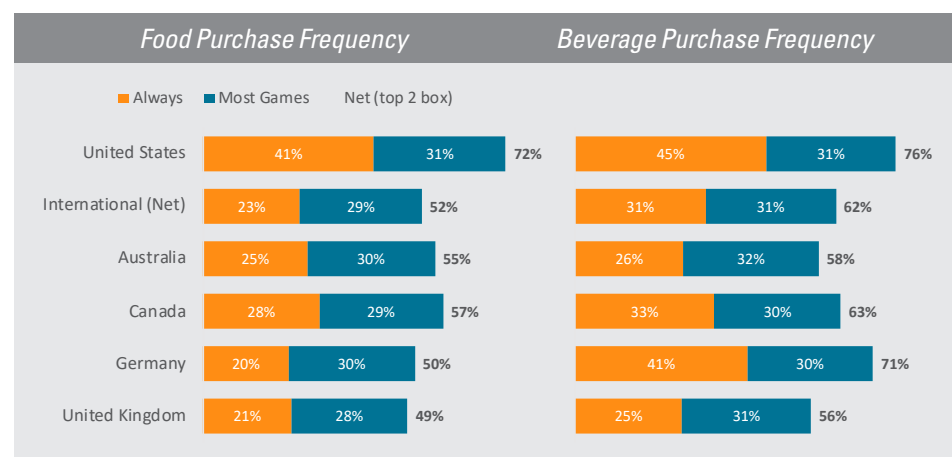
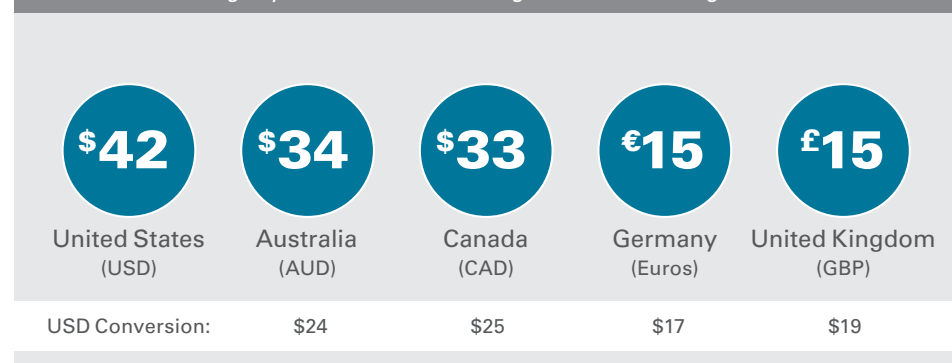
What Do Fans Want?

Fans are extremely interested in making food and beverage purchases while at a stadium. 94% of fans surveyed said they had bought food or drink at a game at least occasionally, with 34% saying that they always bought a beverage and 27% always purchasing food.

97% of US fans have purchased food at a game on at least one occasion.

Although the overwhelming majority of fans are making regular concession purchases, 72% of fans cited that they have had issues with their food and beverage experience at games. Given how much fans are already willing to spend on concessions, despite being deterred by multiple factors, there is an opportunity to increase lost stadium revenue if concessions operations were more streamlined.

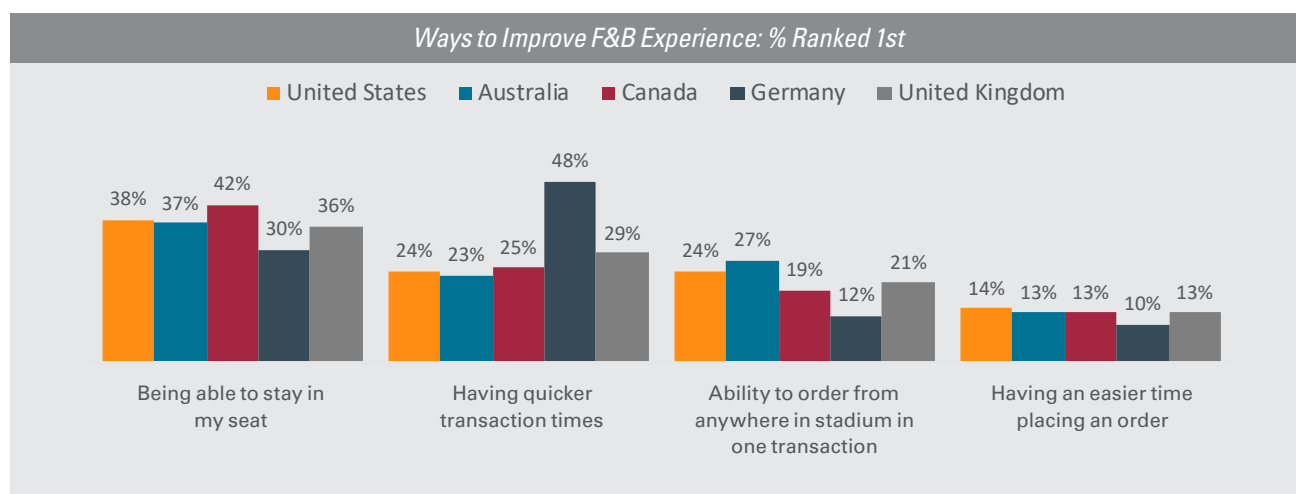
Average Spend on Food & Beverages when Attending Games



I. FANS WANT TO STAY IN THEIR SEATS

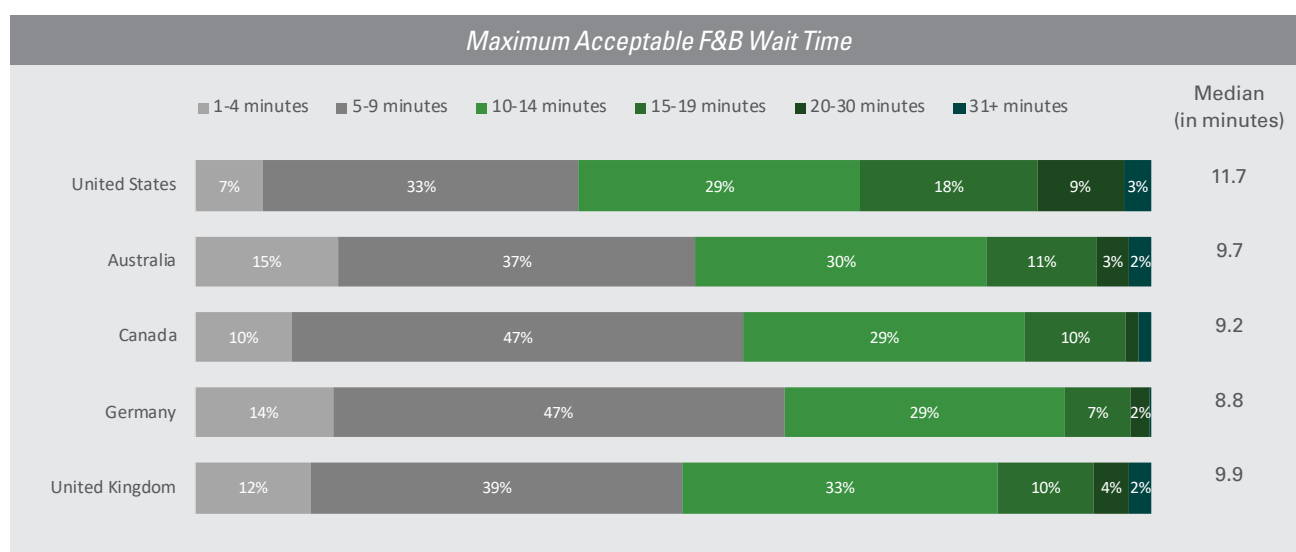
There are a number of ways to modernize the stadium food and beverage experience, but one in particular stood out above the rest — fans want to stay in their seats. In every country except Germany being able to order food and beverage without leaving your seat was the most popular improvement in F&B that fans wanted to see.

The preference in Germany was for faster transaction times when buying food and drink at the stadium.



II. FANS WANT FASTER SERVICE

'Faster transaction times' was a close second when it came to improving the experience of buying food and drink. For the average fan, 10 minutes is the average maximum acceptable waiting time for standing in line to purchase refreshments.

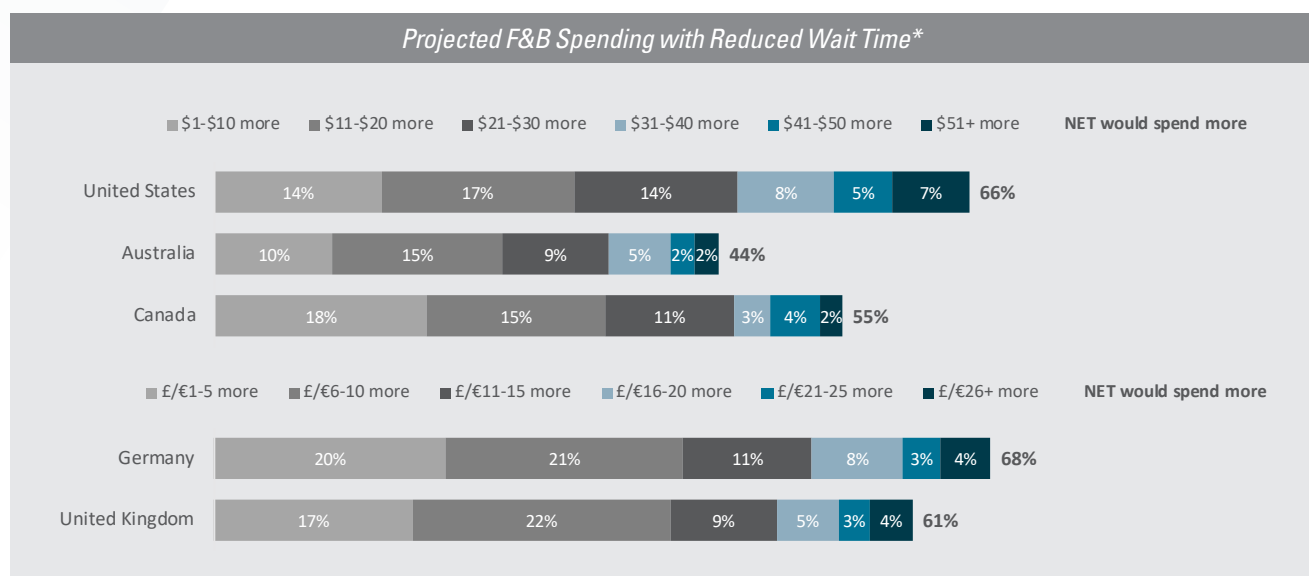




III. FANS WILL BUY MORE IF SERVICE IS FASTER

Slow service has a direct impact on revenues. When asked if they would spend more on food and beverage purchases if their wait time was cut in half, fans resoundingly answered “yes”.

In Germany, 68% percent of fans were willing to spend more for faster service, with the US and the UK close behind. Of these fans, the majority indicated that they would spend the equivalent of \$10 US more per game — which translates into significant revenues for stadiums that hold thousands of fans.

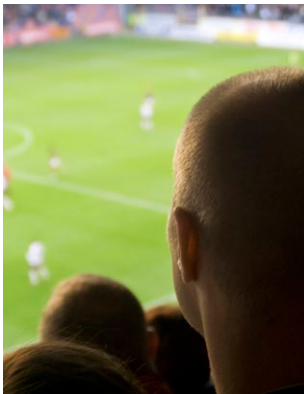


Are fans willing to use new technologies when buying food and drink?

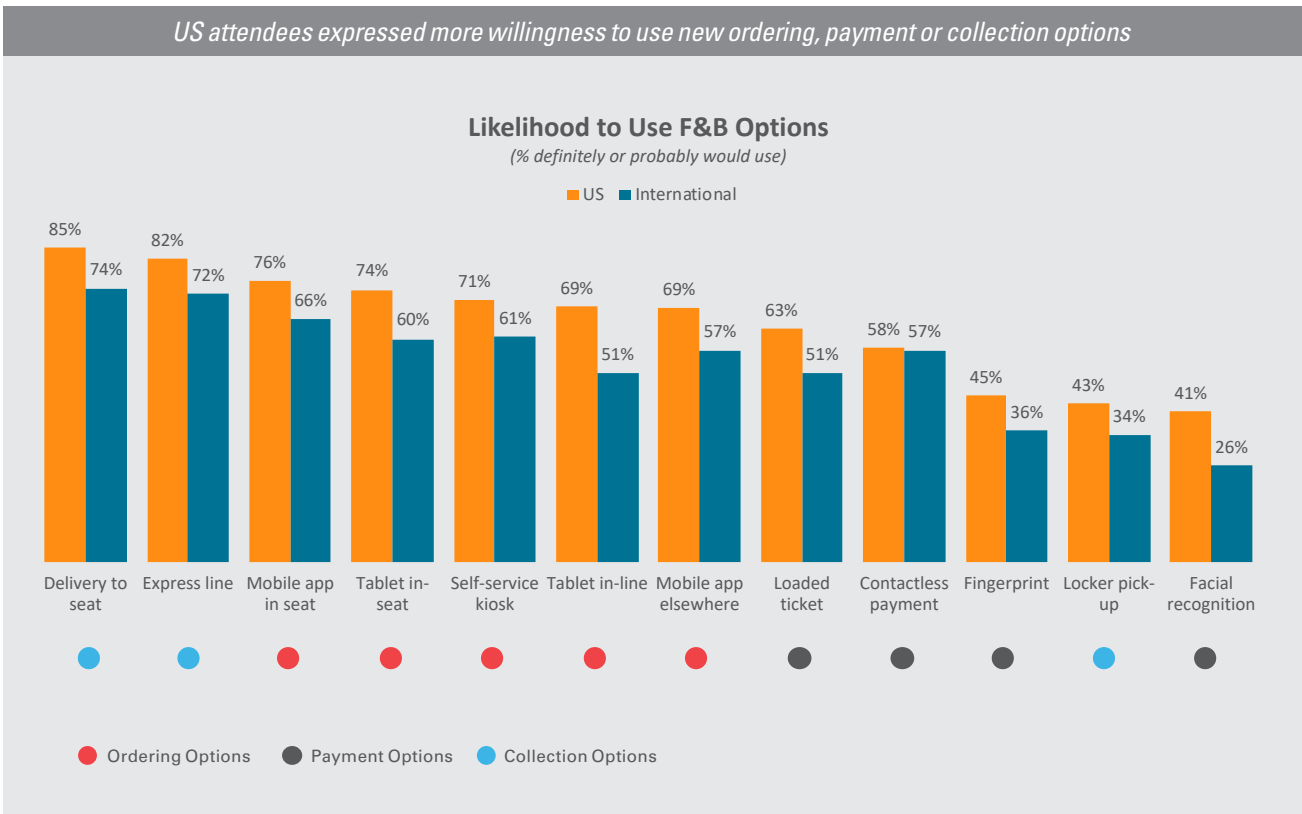
I. FANS VERY LIKELY TO USE NEW SERVICES

If one thing was abundantly clear from this research, it is that fans are willing to embrace new technology if it will help them to access food and drink more quickly.

We asked the fans how likely they would be to use a variety of technology options for ordering, collecting, and paying for their food and drink. Even the least popular of these concepts — payment by facial recognition — was considered to be something that 41% of US fans would definitely or probably use. There is clearly an appetite for more technology in the food and beverage purchase process.



US fans are more willing to use new technologies than fans in other countries.



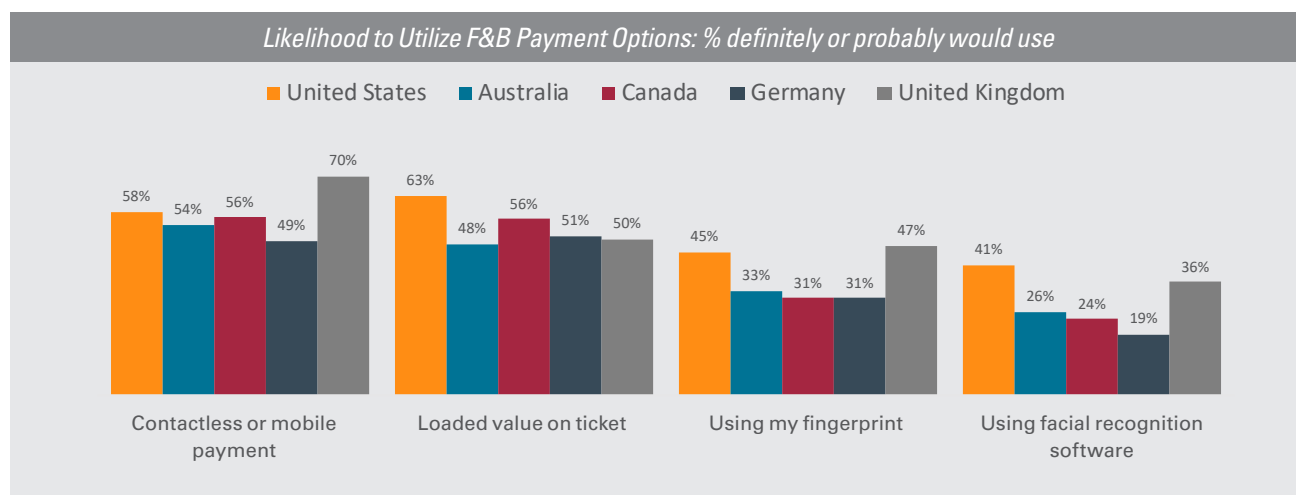
II. MOBILE, TABLET AND KIOSK ORDERING WERE POPULAR

In nearly every country, over 50% of the fans surveyed said that they would be likely to use mobile apps, tablets, or kiosks to allow them to order food and drink.



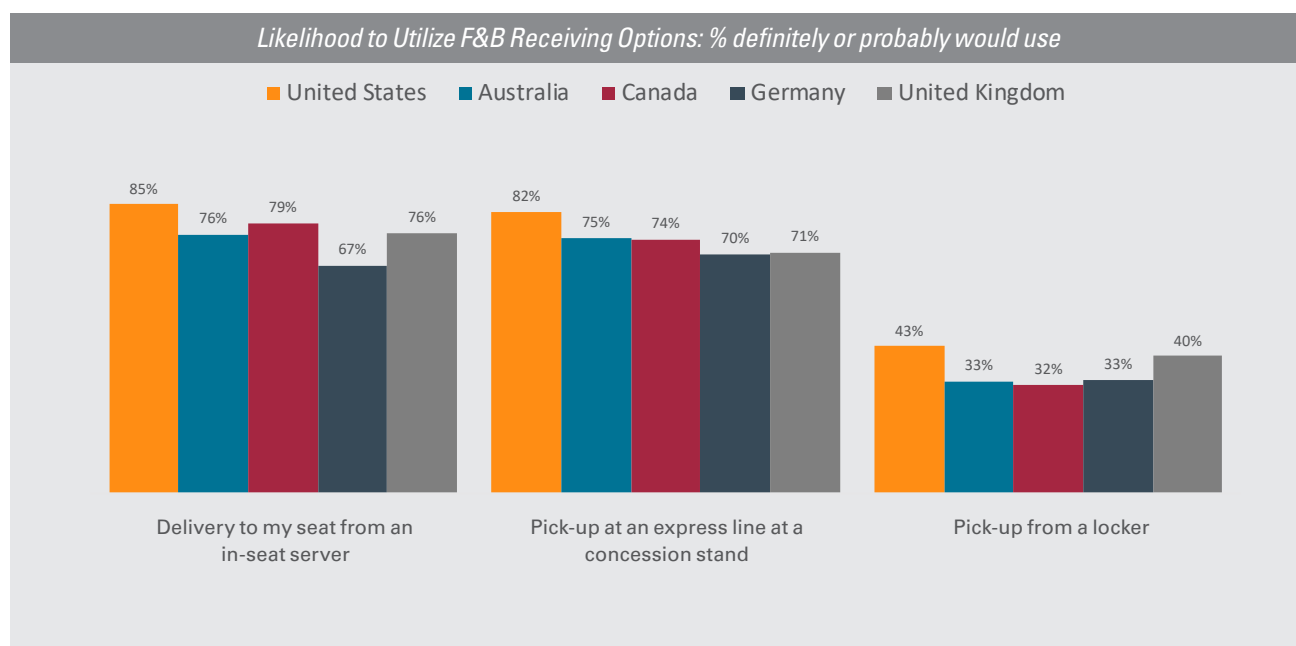
III. BIOMETRIC PAYMENT OPTIONS WERE LESS APPEALING

Simple payment is a critical part of a speedy food and beverage purchase. But while half of fans seemed keen on contactless, mobile, or loaded value ticket options, interest in fingerprint or facial recognition was less pronounced.



IV. IN-SEAT DELIVERY AND EXPRESS LINES WERE PREFERRED FOR FOOD AND DRINK COLLECTION

In-seat delivery was not the only preference; 74% of fans said they would be likely to use express pick-up lines at a concession stand if they were available.





Which Technologies Will Stadiums Use to Support Food and Beverage Service In the Future?

From massive jumbotrons to interactive social media campaigns, stadiums are already foraying into technology offerings to keep fans engaged. With so many technological advances already having been made in recent years, stadiums are eager to push the envelope to win the title of most advanced and innovative venue.

It's critical that stadiums do not overlook concessions as an area of improvement to keep the fan of the future satisfied. So, what exactly can we expect to see as we look ahead?



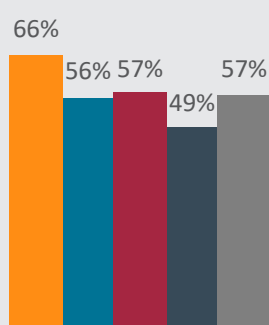
I. NEW TECHNOLOGIES: WHICH ONES WOULD FANS USE?

We asked the fans to consider other technology options that could augment the food and beverage experience at a game.

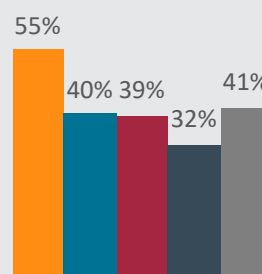
Automated service and delivery was most popular — 57% of fans would welcome the ability to walk into a stadium and have your favorite food and drink ready for you at the right time in the right place. 41% said that they would be likely to use drone delivery or voice activated virtual assistants, while 37% would use augmented reality to see food options. 31% would pay more to have food delivered from outside the stadium. Having food suggested by analytics or social media activity were the least popular, on 30% and 26% respectively.

Likelihood to Utilize F&B Options: % definitely or probably would use

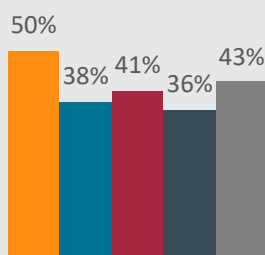
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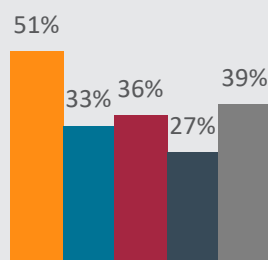
Automated service and delivery



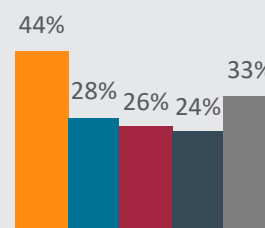
Ordering via a virtual assistant (similar to Siri or Alexa)



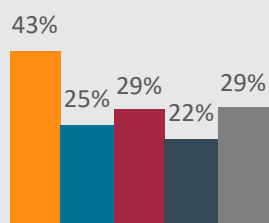
Drone delivery to my seat



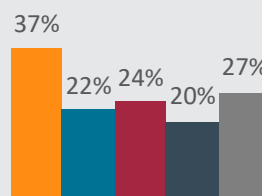
Augmented/virtual reality to view food and beverage options



Pay a premium to have meals from outside of the stadium delivered



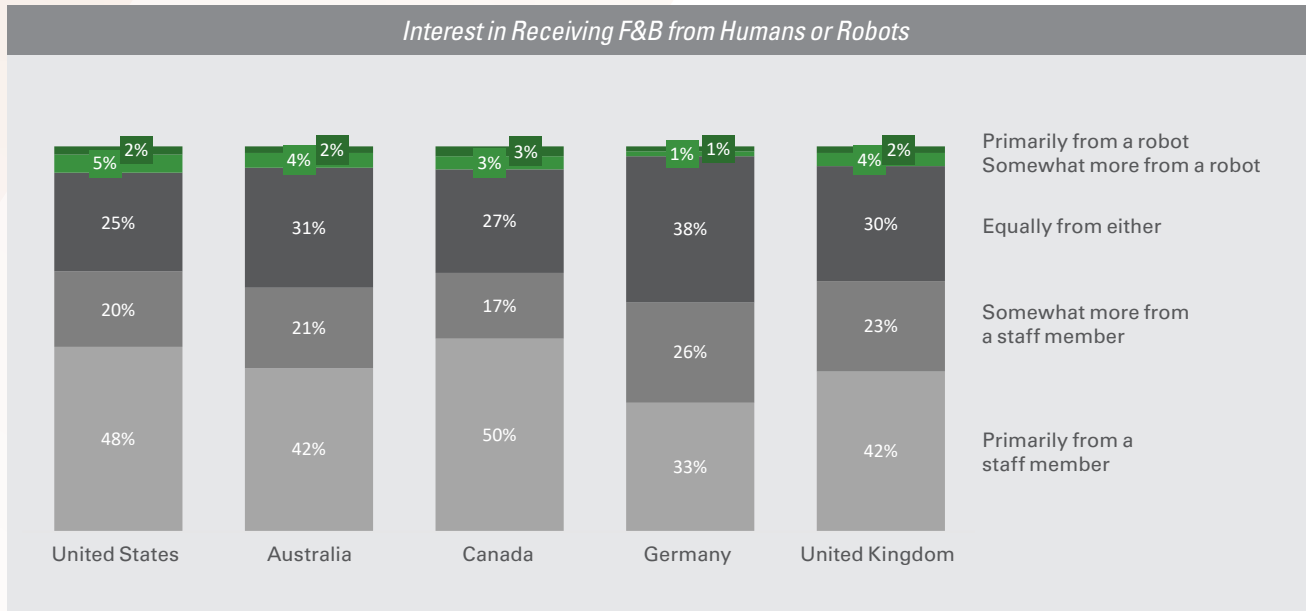
Food and beverage suggestions based on fan analytics



Food and beverage suggestions based on your social media activity

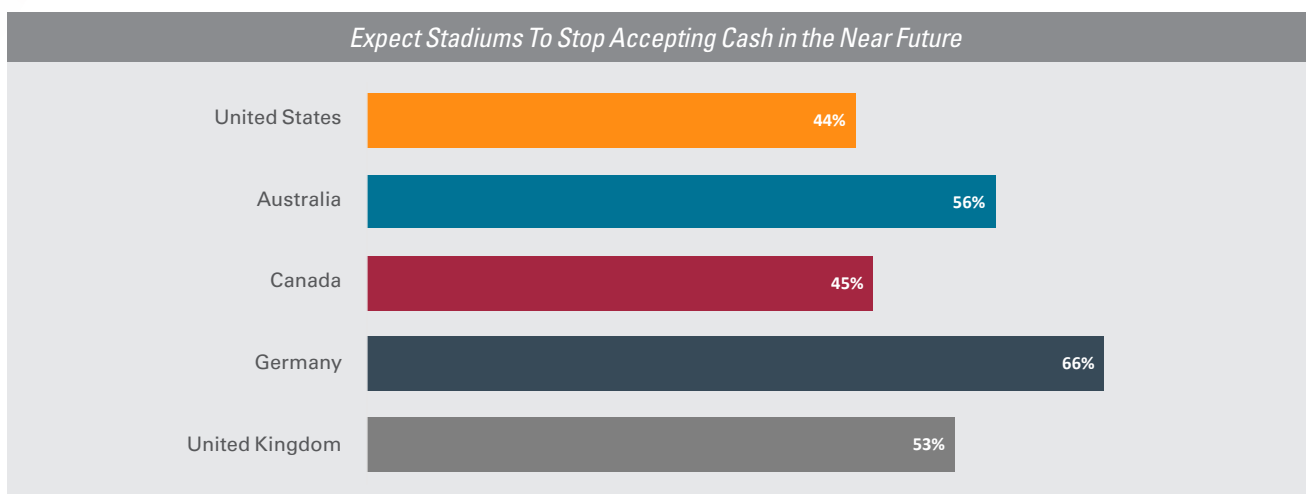
II. FANS WEREN'T VERY INTERESTED IN RECEIVING THEIR ORDERS FROM A ROBOT

Compared to other technologies, there was minimal interest in being served by a robot. Fans are looking for faster service and perceive that robots will not speed up the process.

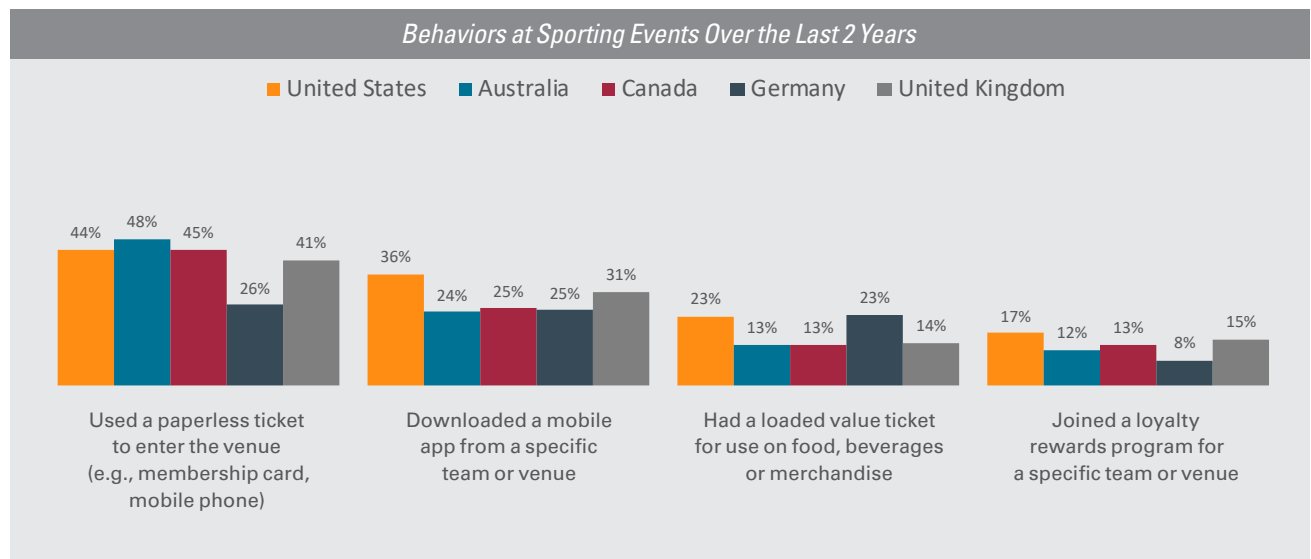


III. MOST FANS THINK THAT STADIUMS WILL BECOME TOTALLY CASHLESS

Some stadiums around the world are already making the move to become cashless, where only credit or debit cards, mobile payment, or loaded value cards are accepted, both to increase service speed and simplify operations. While there has certainly been opposition to this in some areas, 66% of German fans expect stadiums to be cashless within five years. Even in the US, where expectations of a cashless experience were lowest, 44% of fans expect not to be using cash at sporting venues by 2024.



IV. SPORTS FANS ARE ALREADY USING NEWER TECHNOLOGIES



In most countries, almost half of fans said they had already used a paperless ticket to attend a game. Use of loaded value tickets to buy food, drink or merchandise was lower but nearly a third had downloaded a mobile app from their team or stadium.



What Do Fans Want from a Loyalty Program?

When it comes to loyalty, sports fans set the standard. The ability to show dedicated, unwavering support through thick and thin is part and parcel of following a team. But how do sports teams and venues monitor and reward fans for their loyalty and encourage them to keep coming to games?



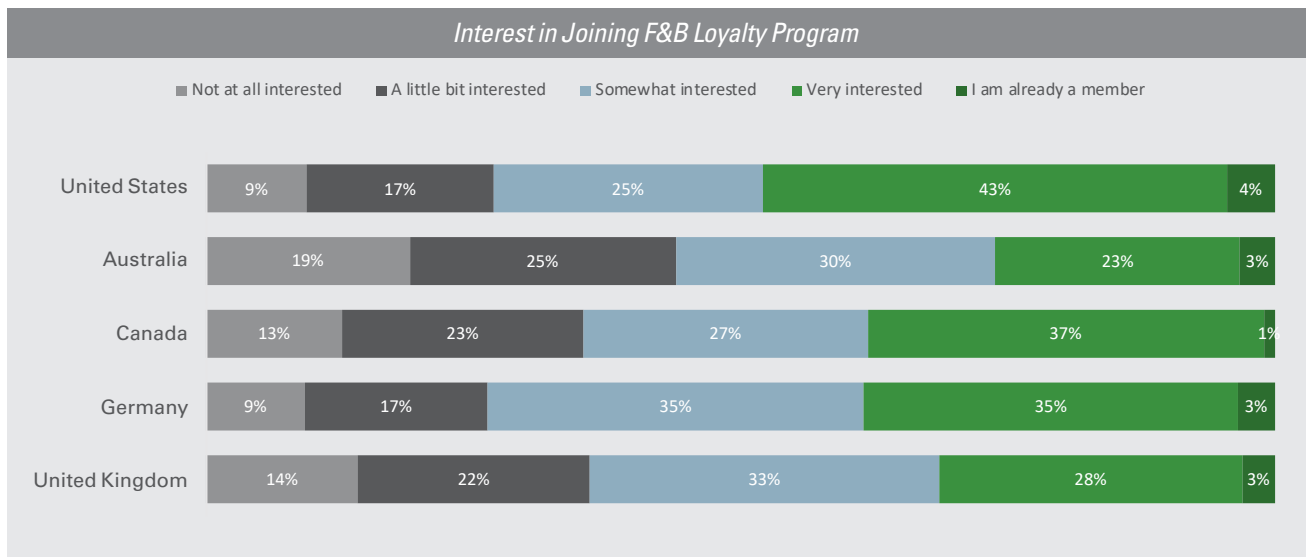
I. FANS WANT TO JOIN LOYALTY PROGRAMS

There's a huge opportunity here; in every country we surveyed, over half of the fans expressed an interest in joining a loyalty program, with Germany and the US leading the way on 70% and 69% respectively.

Interest in Joining Loyalty Program for F&B Purchases: % somewhat or very interested



II. ...BUT PARTICIPATION IS LOW

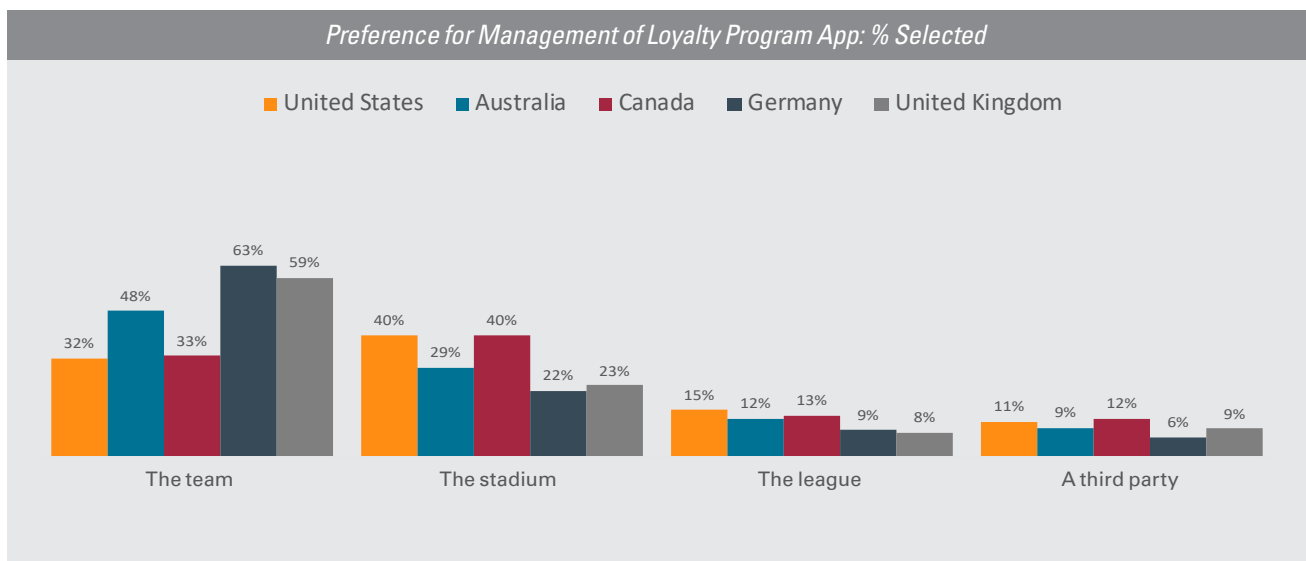


But what's interesting is that only a tiny proportion of fans has actually joined a loyalty program for their team — just 4% in the US right down to 1% in Canada.

What can stadiums do to get more fans engaged in loyalty programs?

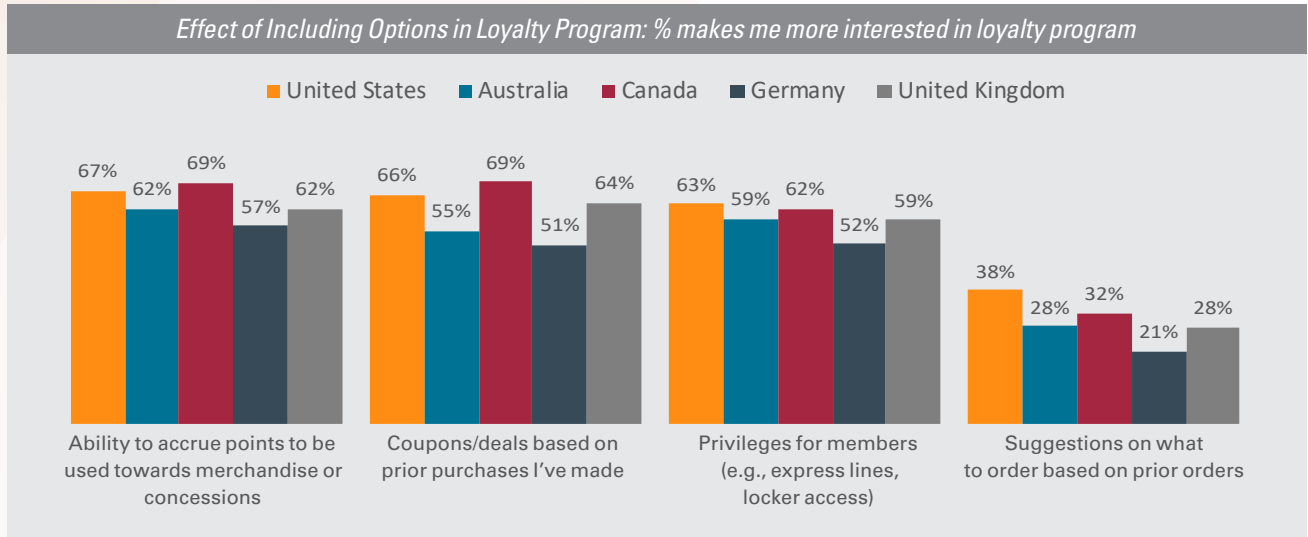
III. FANS WANT LOYALTY APPS MANAGED BY THE TEAM OR STADIUM

Fans remain faithful to their team in all ways — the vast majority prefer a loyalty program managed by their home team or stadium.



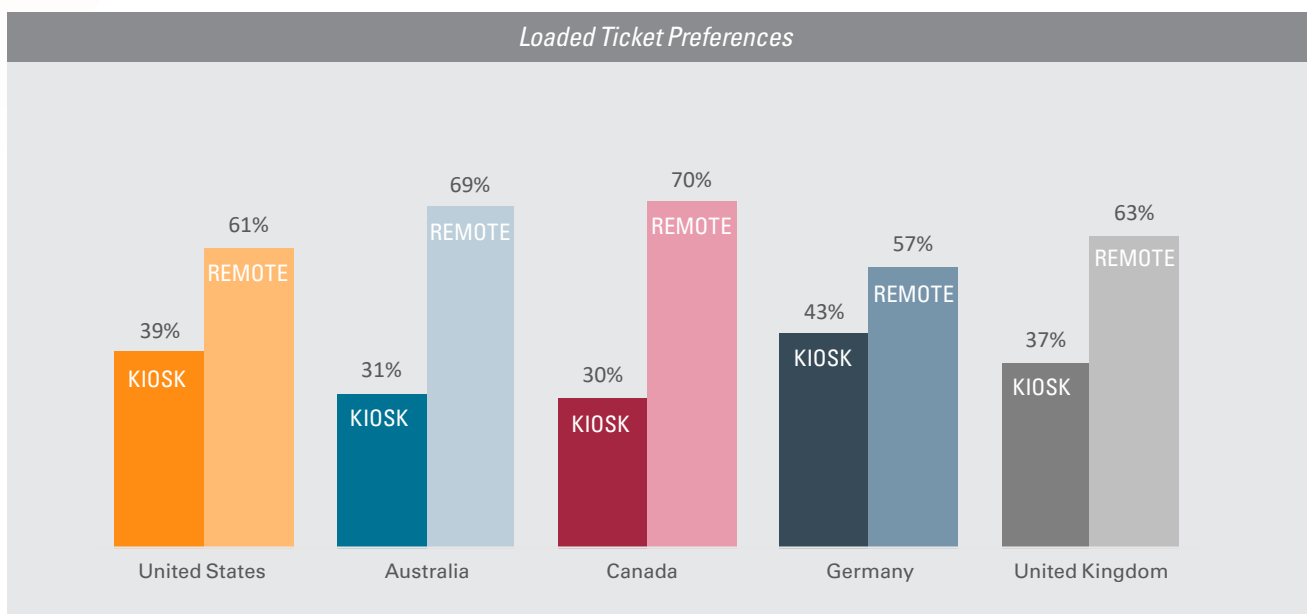
IV. CUSTOMERS ARE VERY INTERESTED IN A VARIETY OF LOYALTY PROGRAM BENEFITS

There is a variety of exciting options available to keep fans engaged and feeling rewarded.



V. LOADED TICKETS ARE A POPULAR FORM OF LOYALTY, AND FANS PREFER TO BE ABLE TO RELOAD TICKET VALUES REMOTELY

Loaded tickets ranked as one of the preferred methods of loyalty, and it makes sense — fans want efficiency and autonomy from a loyalty program. This option is less difficult for fans to use, and allows them to spend as much as they would like on concessions without having to use any additional payment methods.





Conclusion

The sports industry is fast-paced and stadiums need to keep up with the growing demands of their fan base. With new technologies emerging to enhance the fan experience, here are some key takeaways:

1

Fans want to stay in their seats

When it comes to game day experience, fans value the game and their loyalty to their team above all else. They want to be able to enjoy food and beverages at the stadium, but in the most convenient ways possible. Keeping up with the fan of the future requires faster, more convenient service options, whether that be self-ordering and express lines at concessions or in-seat delivery.

2

Sports fans are open to new technology

According to the data, the majority of stadium-going sports fans are technically savvy and interested in using new technology. If an improved ordering or receiving method will allow them to save time, they are definitely willing to use it.

3

...They are already using it

Almost half of the fans we spoke to are already using paperless tickets to access the venue. Half also expect stadiums to be cashless within the next few years.

4

Loyalty programs are a huge opportunity for teams and stadiums to connect with fans

Stadiums have a huge opportunity on their hands with loyalty programs. While tiny numbers of fans are participating in a loyalty program, 63% are very interested in doing so. Increasing this participation could be extremely valuable for stadiums looking to stay engaged with their fan base and encourage further concessions purchases.

ORACLE FOOD AND BEVERAGE



Oracle Food and Beverage brings 35 years of experience providing industry-leading technology solutions to sports and entertainment venues worldwide. The company's point-of-sale platform is the premier food and beverage management solution, enabling operators to deliver an efficient and innovative fan experience throughout their venue. Key features include: point-of-sale, inventory management, loyalty rewards, third-party integrations for in-seat ordering, and more.

Additionally, robust Oracle MICROS hardware is specifically designed and built to withstand the rugged sports and entertainment environment. Options include fixed point-of-sale devices, such as the Workstation 6 Series, the 310 Compact Workstation, and the 700 Series tablets. Oracle Food and Beverage has the solutions to meet your venue's needs.

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