


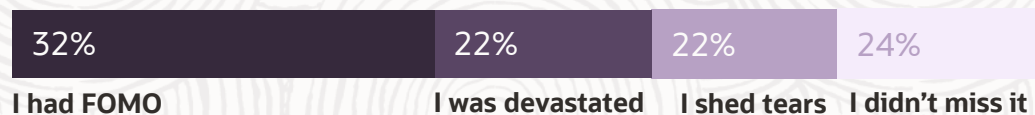
Back in the Arena: Consumer Trends in Australia

For many people, nearly a year has passed since their last outing to a major sports or music event. But while caution remains, research by Oracle shows that the public longs for a return to stadiums and arenas.

Research conducted by independent consultancy, Untold Insights with 3,000 consumers in the UK, US and Australia in January 2021

Data shows that people have really missed live events, and their desire to get back out has intensified in the last 6 months.

 **76%** who used to watch live events say they miss it



25% of AU consumers plan to go back to stadiums as soon as they're deemed safe

AUSTRALIA



However, this isn't true for all groups (particularly Boomers) and it doesn't mean that events should look exactly the same as pre-pandemic.



62%

would prefer distancing measures to continue, even when large events are deemed safe to attend



26%

of event-goers have no plans to return in 2021

Boomers are the largest generation planning to stay away this year

48%

will not attend a sporting event



The future of stadiums

So what should the stadium outing of the future look like? Based on our research, it's about providing a 360°-degree experience that helps customers plan ahead of time, makes attendees feel in control of their experience, and creates a lasting impact beyond the event itself.

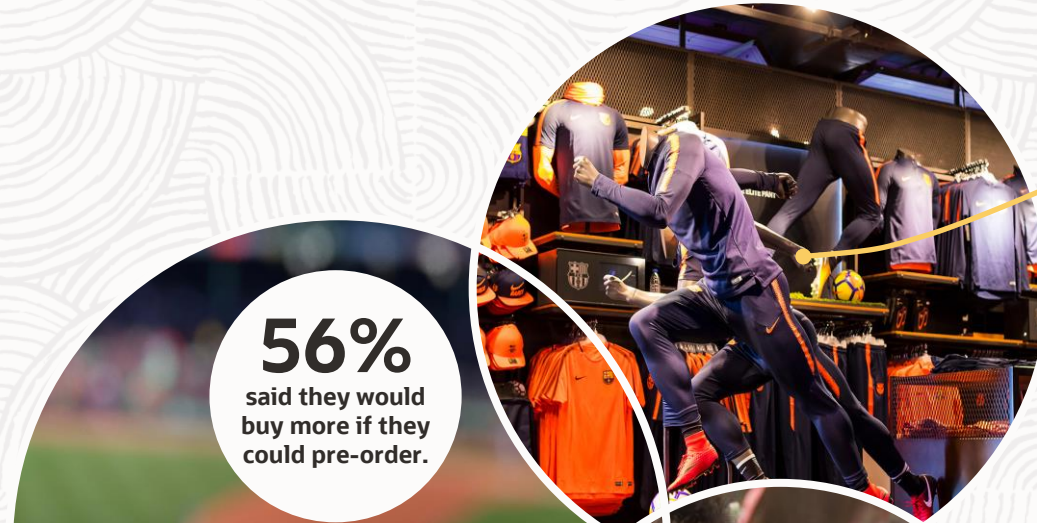


01 Before the event

Let visitors plan ahead

While many long for a return to spontaneous fun, customers aren't quite ready to play it by ear - they want to be able to plan their itinerary and experience ahead of time in order to reduce stress on the day.

Offering pre-purchase options for food, drinks and merchandise will become key in driving sales for the foreseeable future.



49%

think it would be awesome to plan their itinerary for the day in advance

56%

said they would buy more if they could pre-order.



43%

would exchange personal info in exchange for personalised game-day offers

56%

would like to be able to schedule food and drink orders before arrival



02 Inside the stadium

Make guests feel like VIPs

Harness the capabilities of digital and omnichannel technology to make guests feel like VIPs, by offering a variety of premium services and add-ons to meet the demands of various types of consumers.

Help families feel like VIPs with a 'fast pass' option

64%

say this would be awesome compared with 45% for those without kids



Help Millennials feel like VIPs with priority access

50%

of Millennials say priority access so they can jump the queue is worth paying more for compared with 36% of Boomers



Help Gen Z's feel like VIPs with contactless kiosks to order hot food

52% of Gen Z's

missed hot food the most (compared with 37% on average) and 28% of all consumers would prefer to pay contactless via a kiosk



03 During the show

Anticipate a shift in *standards*

Consumer expectations for cleanliness, safety measures and personal space are at their peak. Socially distanced seating arrangements for example are expected as a given in the current climate. But, with the right mix of personalization, preferences management and real-time data on inventory and transactions, it's possible to improve crowd management and still grow game-day revenue.

53%

Pre-planning the day should be a standard feature



49%

Pre-ordering food and beverages should be included as standard



41%

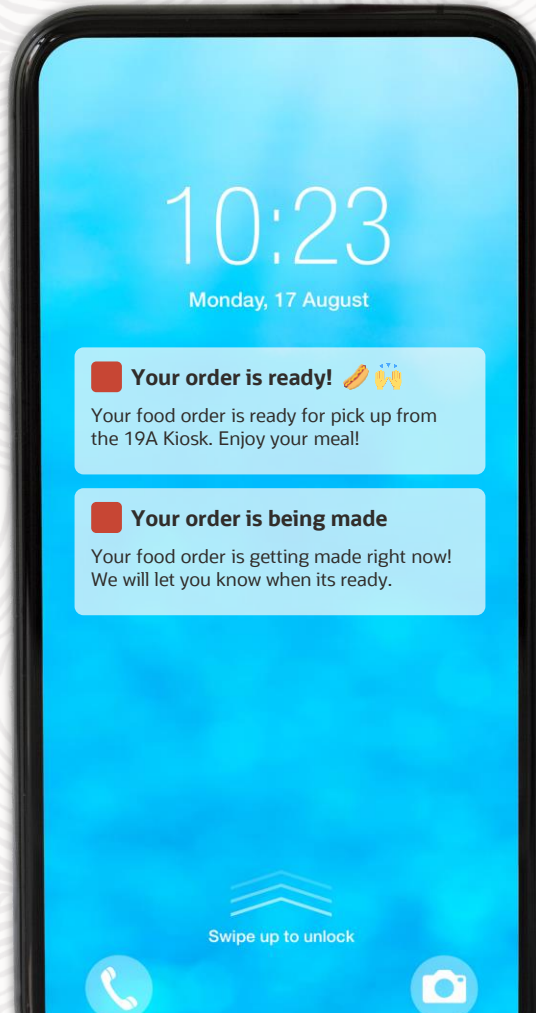
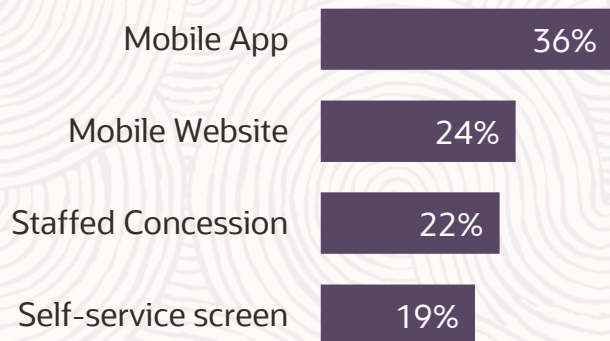
would love to pay more to jump the queue



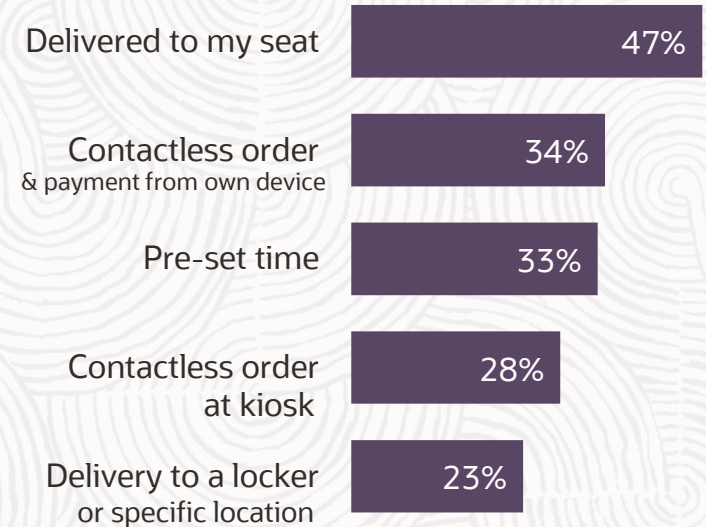
03 During the show

How people want to interact

When attending an event at a stadium, which would be your preferred way to order food and drinks?



Which of the following would make you feel more comfortable ordering refreshments at a stadium?



04 After the event

Extend your reach

Audiences are more eager than ever to make a full-day experience of any outing. But as customers are keen to avoid peak times and crowd bottlenecks, many will be looking for additional food and leisure options.

Building a substantial partner network around the arena and at strategic transport locations can create additional revenue streams.



53%

would typically go out after the event for more food or drinks

54%

would be more likely to visit nearby restaurants before or after the event if they had a compelling offer or promotion

05 Beyond the stadium

Cater to fans everywhere

The past year has made many people more open to digital viewing experiences, offering opportunities to create secondary revenue streams through top-notch home-viewing options enhanced with real-life experiences to let home audiences feel more involved.



40%

would love to buy a "game-day" food and beverage package, delivered prior to the game



READY FOR HALF-TIME!



46%

think it would be awesome to integrate the viewing experience with food delivery apps to get food deliveries during the game



1 in 3

think it would be cool to get deliveries of food, drink and merchandise by drone while watching the game



05 Beyond the stadium

Stay connected anywhere



53% say the biggest loss is the atmosphere and buzz



Bring a sense of atmosphere and community into the home through digital experiences



27% say it would be awesome

to participate as part of a virtual crowd, sending support to my team digitally.



26% say it would be awesome

to join live chats or communities with other fans so we can talk about the game live





ORACLE

Food and Beverage

Learn how Oracle can help you design the stadium experience of the future: www.oracle.com/sports-entertainment

