



# The CGA and Harrison Stadia

F&B Report

**Harrison.**



PHENOMENAL DATA. EXPERT INSIGHT.

# Welcome



Welcome to the inaugural Stadia F&B Report from CGA and Harrison. This white paper provides much-needed analysis of the fast-changing world of food and drink at stadia around Britain, including football and other sports grounds and music venues.

Our research pairs CGA's unrivalled knowledge of Britain's out of home eating and drinking market with Harrison's expertise in hospitality architecture, design and branding. It features exclusive insights into the demographics of British consumers visiting stadia, and their attitudes and habits around food and drink. It provides a snapshot of F&B offerings at some of Britain's most iconic and distinctive venues, and case studies from stadia in the US and beyond to learn from. We take a look at some of the ways in which technology is shaking up the sector, and consider where food and drink in stadia might be headed next.

Our aim is to provide the intelligence and ideas that businesses need to grow food and drink sales in stadia and improve their offer. We hope you enjoy reading our research, and would love to hear your own views.

Contact the teams at CGA and Harrison if you would like to discuss our findings or would like to know how we can help your business.

CGA - [www.cga.co.uk](http://www.cga.co.uk)  
Harrison - [www.harrison.hn](http://www.harrison.hn)

## Contents

- 4. **Food and Drink in Stadia: The Consumer View**
- 6. **The Evolving Offer: Six British Stadia**
- 8. **Inspiration From Overseas Part 1: Five North American stadia**
- 10. **Inspiration From Overseas Part 2: Five International Stadia**
- 11. **Trends to Track: Ten Big Opportunities in Stadia F&B**
- 12. **The design brief: The Yard @ Derby County**
- 14. **Grounds for Technology: How Digital Can Improve the Stadia Experience**
- 15. **The View from CGA and Harrison**

## Stadia, Food and Drink: Ten Key Numbers to Know

# 12.1 MILLION

BRITISH ADULTS HAVE VISITED STADIA IN THE LAST 12 MONTHS



# 19%

OF BRITISH ADULTS HAVE VISITED FOOTBALL STADIA IN THE LAST 12 MONTHS



# 70%

OF STADIA-GOING CONSUMERS ARE MALE



# 42%

OF CONSUMERS CITE EXPENSIVE FOOD AS A FRUSTRATION IN STADIA



# 38%

OF CONSUMERS CITE LENGTHY QUEUES AS A FRUSTRATION IN STADIA



52% OF CONSUMERS RATE THE FOOD ON OFFER AT STADIA AS EITHER 'OK'

# 28%

'OK'

# 15%

'POOR'

# 9%

'AWFUL'

# £113.48

THE AVERAGE MONTHLY EATING AND DRINKING OUT SPEND OF STADIA-GOING CONSUMERS—27% MORE THAN THE NATIONAL AVERAGE OF £89.60



52% OF CONSUMERS RATE THE DRINKS ON OFFER AT STADIA AS EITHER 'OK'

# 33%

'OK'

# 14%

'POOR'

# 5%

'AWFUL'

# 58%

OF STADIA-GOING CONSUMERS ARE WHITE COLLAR—COMPARED TO A NATIONAL AVERAGE OF 45%



# 71%

OF STADIA-GOING CONSUMERS CONSIDER THEMSELVES KNOWLEDGEABLE ABOUT FOOD AND DRINK—TEN PERCENTAGE POINTS MORE THAN NON-STADIA-GOING CONSUMERS





# Food and Drink in Stadia: The Consumer View

ATTENDANCE IS CERTAINLY BIASED TOWARDS MEN:

**MALE**  
**70%**

**58%**  
**WHITE**  
**COLLAR**

**51%**  
**DRINK**  
**OUT**  
**WEEKLY**

How many British consumers visit stadia, who are they, and what do they think of the food and drink on offer? CGA's BrandTrack, a quarterly survey of more than 5,000 nationally representative consumers, has the answers. Here's what our research reveals.

## How many people visit stadia?

A quarter (**25%**) of British adults say they have visited a stadium of some kind in the last 12 months—equivalent to nearly 12.1 million people. Nearly one in five (**19%**) has visited a football stadium, and one in ten (**10%**) has visited another sports ground.

## Who are they?

Stadia are often perceived to be the haunt of young, blue collar males—but football grounds in particular are a broader church than some might think.

Attendance is certainly biased towards men: **70%** of those who have visited a sports stadium in the last year are male. A third (**34%**) are aged 34 or under—over-indexing against the national average of **29%**.

But with ticket prices rising, football fans have become a more affluent crowd over the years. Well over half (**58%**) of stadium-goers can be classified as white collar—much higher than the national average of **45%**. They have money in their pockets, spending **27%** more on out of home eating and drinking than the average adult British consumer. Half (**51%**) of them drink out weekly, compared to a third (**33%**) of the wider adult population.

What's more, they are knowledgeable about food and drink. Over half (**54%**) consider themselves to be foodies, against a national average of **49%**. More than two in three (**71%**) say they take a keen interest in food and drink.

## What do they think of the food and drink?

So today's stadia visitors are more varied, more affluent and more knowledgeable about what they eat than previous generations. But does the food and drink they are offered reflect these changes?

For sports fans especially, food is arguably still catering for old stereotypes, focusing on cheaper ingredients, holding ovens and low-cost labour. Drinks tend to be limited in range and dominated by a handful of household brands.

CGA's BrandTrack survey suggests stadium-goers are not satisfied with that. More than half (**52%**) of those visiting stadia rate the food on offer as either 'OK', 'Poor' or 'Awful'. By comparison with consumers' ratings of food and drink in other environments, like pubs or restaurants, this is a damning verdict that indicates significant room for improvement.

It is the same story on drinks, where the same proportion (**52%**) rate provision as 'OK', 'Poor' or 'Awful'. It highlights a severe gap between the eating and drinking out expectations of stadium-goers and what they actually get.

## What puts them off?

Consumers are clearly disappointed with the range and quality of food and drink they get at stadia. But there are two more big bugbears too: expense and queues.

Asked about their biggest frustrations when visiting stadia, expensive food and expensive drink both made consumers' top three. CGA's BrandTrack survey shows that only a small number (**11%**) use the word 'expensive' to describe an eating-out brand—but four times that number cite expensive food (**42%**) and expensive drinks (**41%**) as among their top three frustrations in stadia. Nearly as many (**38%**) cite lengthy queues to get food and drink as a major frustration.

These findings distil into three clear demands from consumers at stadia: for better food and drink, better value for money and better service. These are the challenges that stadia operators, retailers and designers need to meet if they are to improve their customer satisfaction and increase their sales in the years ahead.



**CITE LENGTHY QUEUES TO GET FOOD AND DRINK AS A MAJOR FRUSTRATION.**



# The Evolving Offer: Six British Stadia

From celebrity chefs to craft beer, and veganism to dressing room dining, some British stadia are starting to push the boundaries in food and drink. These five venues around the country all offer food—and drink—for thought.

## 1. Carrow Road, Norwich - Harnessing the power of the Delia brand

Stadia caterers seeking a role model for raising the standards of their food could hardly do better than perhaps the UK's best-loved cook: Delia Smith.

Since becoming a majority shareholder at Norwich City FC in the mid-1990s, Smith has revolutionized the catering at Carrow Road. The high end Delia's Restaurant and Bar opens every Friday and Saturday night, while her American-style Yellows Bar and Grill provides a sister offer that is also available for private hire. The slogan of umbrella company Delia's Canary Catering—'More Than A Match'—shows how stadium restaurants can become not just places to fuel up on match days, but destinations in their own right.

## 2. The Etihad Stadium, Manchester - Revamped offer with Legends International

Manchester City's Etihad ground demonstrates how stadia can extend a food and drink offering way beyond the 90 minutes of a game and outside the boundaries of the ground. Entertainment at the 'City Square' area for fans begins several hours before kick-off, with large TV screens and live music drawing in people to eat and drink at various bars and cafés. This family-friendly area is open after matches too, further extending the time and money people spend at the stadium.

The Etihad's offer is the result of a collaboration between Manchester City and Legends International, a group with expertise in event hospitality at many major US sports stadia. It shows how operators in the UK are starting to learn from their counterparts overseas.

## 3. The New Lawn, Nailsworth - Fully vegan and carbon-neutral

Earlier this year Forest Green Rovers became the world's first UN-certified carbon-neutral football club—an honour that came on top of recognition from the Vegan Society as a fully vegan set-up. The club points to veganism's environmental benefits and its positive effects on players' performance, and extends the diet to fans too, via vegan takes on matchday staples like pies and burgers. Now Forest Green is taking its principles further afield with a 'Little Green Devils' range of vegan products for caterers and wholesalers serving schools.

The club admits its fans were sceptical at first, but claims they now embrace both the taste and the health benefits of vegan food. In the homogenous world of stadia catering, Forest Green's is probably the most distinctive F&B offer of any sports ground in the country.

## 4. Pride Park, Derby - A high street casual dining venue right at the heart of a stadium

Pride Park Stadium has been Derby County's home ground since 1997 and boasts a capacity of 33,597 seats. As well as Rams' home games, the stadium is used for a range of non-matchday activities including conferences, weddings and other sporting events. In recent years, the stadium has hosted concerts by major international music artists, monster trucks and international friendly football matches.

The stadium was originally built on the site of railway yards. This heritage and sense of location is what has given inspiration to create a unique all-day restaurant and bar right at Pride Park, combining an offer that can both host volumes of guests on match days but that can stand up on its own right as well, as a cool and contemporary out-of-home venue, flavoured with the area's local heritage. The Yard is unique to Derbyshire, celebrating the County's natural larder as well as featuring many of its favourite local dishes. Combining exciting, fresh food, great service, and an extensive drinks menu - a fully stocked, wide-ranging bar serving draught and bottled beers, ales, fine wines and champagne, spirits, mixers, and cocktails - the restaurant and bar delivers great quality, making it a fantastic venue to visit. Guests can enjoy any part of the space at any time of the day or week.



## 5. Twickenham, London - Celebrity chef and novel dining options

As at Carrow Road, the home of England's rugby team leverages a well-known chef's name on a premium dining offer. Tom Kerridge fronts The Lock, one of four different restaurants built as part of an £81 million refurbishment of Twickenham. Kerridge designed the menu for each of England's four recent Autumn Internationals, and also designed 'Lush' hot dog and corn dog stands at the games. Twickenham and its partner the Compass group serve up to 10,000 covers on match days, and make the most of other parts of the ground too, including private dining in the changing rooms and pitch-side barbecues and drinks parties in the summer.

## 6. Wembley, London - Street food and perfectly served local beer

Home to the Three Lions, Wembley features 8 restaurants, 34 bars and 688 food and drink kiosks, offering a range of hot and cold drinks, beers, handcrafted pies and confectionery. Equipped with an efficient Multi Dispense Unit system, concession points can deliver a more efficient and effective product to serve the perfect pint. The Stadium has reduced guest queuing times, significantly improving the guest experience. Approximately 40,000 pints of beer can be served during half time in a football or rugby league match while the soft drink dispensers can pour 30,000 cups in a little over 10 minutes!

To complement its various kiosks providing standard stadium food and drink, Wembley echoes London's flourishing street food scene outside at The Market Place. Open before, during and after games, it has a range of international dishes alongside the usual burgers and hot dogs. Big screens and live music encourage fans to stay longer. Inside, the Club Wembley development has some interesting options at the premium end, including a bar installed by the Camden Brewery, two Laurent-Perrier Champagne Lounges and a members-only pub called The Three Lions with a self-service beer dispenser, the first of its kind in Europe. The system employs holes and magnets to pour pints quickly, efficiently and of high quality.



# Inspiration From Overseas Part 1: Five North American Stadia

On quality, innovation and scale, UK stadia can learn a lot from their counterparts in North America, where food and drink is deeply engrained in sporting and live event occasions. Here are five big American Football, baseball and ice hockey venues that have adapted their offers in recent years.

## 1. AT&T Stadium, Arlington - Food offer revamped to tap into trends

The Dallas Cowboys' American Football stadium revamped its F&B offer in the autumn with the help of Legends International. After a survey of fans identified a demand for more international flavours, the AT&T now offers the likes of pork belly burger, street food-style sopadillas and avocado crab dip. Even more radical departures from the standard meat-heavy stadium fare include a 'Thai Veggie Wrap' and 'African SuperGrain Bowl'. Hungrier Texans haven't been neglected though: the stadium also offers a fried chicken burger wedged between two waffles that is nearly half a foot tall.

## 2. Bell Centre, Montreal - Street food to fine dining

The venue that hosts the Montreal Canadiens ice hockey team and numerous events throughout the year has one of the most ambitious stadium catering offers in North America. There is a two-floor sports brasserie called La Cage with 550 covers and 70 TV screens, and a Mythik lounge for tapas and cocktails. Upmarket options include Restaurant 9-4-10 and a 300-cover fine dining restaurant for private members called La Mise Au Jeu. Even the stand-side concessions are bold: one operation has eight counters with Japanese, Mexican and poké options and 16 beers on tap.

## 3. Coors Field, Colorado - An in-house brewery and taproom

As might be expected from a venue named for the Coors Brewery Company, this stadium, home to the Colorado Rockies baseball team, has a big emphasis on beer—and in 1995 it became the first US sports stadium to set up an in-house brewery. The SandLot Brewery now produces around 1,500 barrels of beer a year, selling them on match days from a stadium taproom that is also available for private hire.

Branded concessions at AT&T Park include a Jack Daniel's Terrace, a Rooftop Bar offering more local and national craft beers, and a premium burger restaurant called CHUBurger. Concession stands provide more traditional fan food.



## 4. AT&T Park, San Francisco - Craft coffee and social media links

The stadium of the San Francisco Giants baseball team uses brand partnerships and social media to engage customers in its various food and drink offers. Peet's, a craft coffeeshop chain founded in the San Francisco Bay area and now with several hundred stores, puts its name to an '@ Café' operation, with video walls scrolling the latest messages and photos about the Giants and Major League Baseball via Twitter, Instagram and Facebook.

The stadium also has a 'Public House' pub that opens every day, a 'Garden' area with two bistros, and a programme encouraging children to grow and eat healthy food. The stadium promotes its environmental credentials, having cut gas, water cooking oil consumption and introduced recyclable or compostable packaging.

## 5. Lambeau Field, Wisconsin - Standalone everyday restaurant

Home of the Green Bay Packers American Football team, Lambeau Field has a standalone restaurant that is open every day from 11am to 10pm, regardless of whether a match is on. The 1919 Kitchen & Tap has a very extensive menu and around 80 local and international beers on tap, plus cocktails including a 'Packers Punch'. Named after the year of the Packers' creation, the venue shows how clubs can leverage their history in their food and drink offer. Elsewhere in the stadium on game days, training camps and other events, there is a range of portable concessions including 'Goal Line Grills' for hot dogs, 'Pack 'n' Cheese' for macaroni cheese and 'Pile On Nachos'.



## Inspiration From Overseas Part 2:

### Five International Stadia

What can British stadia learn from big sports and music venues in Europe, Asia, South America and Australia? These are just five of the many locations that designers and operators can turn to for inspiration.

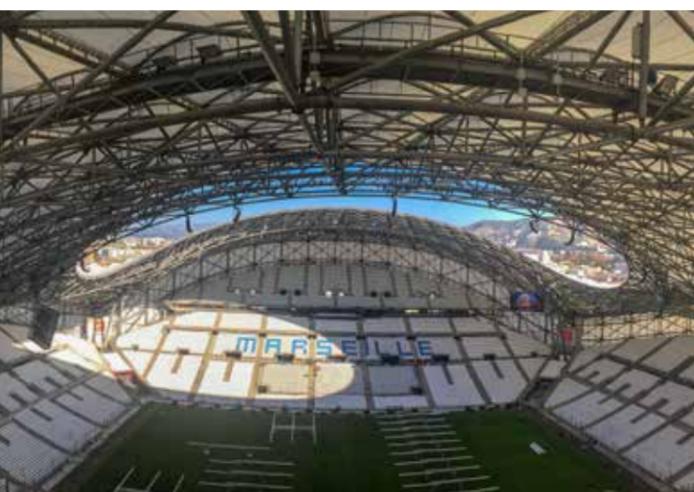
#### 1. Melbourne Cricket Ground, Australia - Sports-themed bars and mobile carts

Reflecting Melbourne's culture of good and often healthy food, the MCG—home to rugby, football, Australian Rules and music events as well as cricket—has a far ranging food and drink offer. Its hospitality venues are run by catering partner Epicure, and include distinctive bars and cafes including the Barassi Café, Haydn Bunton Sports Bar and Hugh Trumble Cafe, all named after local sporting legends. Two of the stadium's cafes are open to the public every day of the week.

The MCG's more traditional sports catering is clearly themed in concessions including The Fish Shop, Dog Bar, Pie Shop Cart, Donut Cart and Dimmies Den, a mobile operation serving dim sum.

#### 2. The Orange Vélodrome, Marseille, France - Leading the way on eco issues

The food and drink at the Orange Vélodrome in Marseille is nothing to write home about, with sandwich bars about the extent of the offer outside of the members' areas. What makes the stadium noteworthy is its dedication to reducing environmental impacts. Its design includes a curved roof to harvest rainwater and wind turbines, making it water and energy autonomous, and there is extensive recycling. As consumers become increasingly aware of their carbon footprints, more and more stadia will be following Marseille's eco-friendly lead in the future.



#### 3. Parque Allianz, Sao Paulo, Brazil - Sushi and Jack Daniel's

A multi-purpose stadium in Brazil that is home to shows, concerts and corporate events as well as games involving leading club Palmeiras. Its food and drink includes a high-end Japanese restaurant called Nagairo Sushi, a members-only Champions Club and a Fanzone by Jack Daniel's.

#### 4. Tokyo Dome, Japan - Big US brands and a destination in its own right

The Tokyo Dome is the home of the Yomiuri Giants baseball team and other events, and has one of the most extensive F&B offers of any stadia in the world. The stadium and its surrounding 'village' of Tokyo Dome City have more than 70 different restaurants, cafes and bars, including concessions from a host of big US-based brands like Taco Bell, Shake Shack, Denny's, KFC, Starbucks and Bubba Gump Shrimp. Japanese concepts range from top-end sushi dining down to fast food. Like the O2 Arena in London, the Dome has successfully evolved a sports and music stadium into a fully-fledged leisure destination at which people can spend a whole day.

#### 5. Veltins Arena, Gelsenkirchen, Germany - Five kilometre beer pipeline

As well as being one of the most modern football grounds in Europe, the home stadium of German football club FC Schalke is notable for its beer. Here, several dozen bars and cafes are connected by a beer pipeline that weaves around the stadium for 5 kilometres via four cooling centres. It can transport around 14 litres of beer a minute, and supplies some 50,000 litres of beer on match days. It is supplied by the Veltins Brewery, which holds the naming rights to the stadium.

## Trends to Track: Ten Big Opportunities in Stadia F&B

As stadia seek to evolve their food and drink provision, it is vital to understand consumers' motivations and behaviour. What do today's sports fans and concert-goers expect when they visit stadia? Where are the emerging opportunities in food and drink? And how are wider consumer trends and economic factors shaping their expectations? CGA's unrivalled research sources provide the deep insights that are needed to unlock sales.

### The middle ground

The clearest gap in the stadia market lies between traditional pie-and-pint catering and the hospitality market. CGA's research has charted the relentless rise of casual dining over the last ten years, and Britain now has nearly 2,000 more restaurants than it did five years ago—the bulk of them managed and branded operators that sit between value and luxury options. By comparison with the British high street, stadia are noticeably lacking in these kind of informal but good quality dining options.

### Freshness

CGA's consumer research identifies the close correlation between the freshness of food and perceptions of its quality. The demand for fresher food may lead more caterers to consider cooking some dishes fresh to order rather than pre-cooking and keeping them warm—though that will have to be balanced against the need for fast and high-volume service.

### Health

As might be expected of people with an interest in sports, stadia-going consumers have an interest in healthy eating. Two thirds (68%) of them proactively try to lead a healthy lifestyle, the BrandTrack survey shows—slightly more than the national average (65%). Stadia need to cater well for the growing number of people seeking food that is more nutritional and less calorific than traditional football ground fare.

### Premiumisation

One of the biggest trends in drinking out in the last couple of years has been premiumisation—the trading up from standard beers, wines and spirits to something different or more sophisticated. CGA's data suggests many consumers are prepared to pay more for their drinks if the quality is right—though in a market where prices are already relatively high, achieving this trade-up may be harder than in high street pubs or bars.

### Street food

To find that sweet spot of quality, freshness, speed and value, growing numbers of caterers are looking towards street food. Some fast growing casual dining restaurant concepts have started out as mobile operators, and food markets are one of the fastest growing segments of the eating out sector. As well as being on trend, the street food approach makes the most of limited and flexible space—something well suited to stadia.

### Craft beer

CGA's research shows a relentless rise in the popularity of craft beer over the last few years, and the BrandTrack survey indicates that nearly a quarter (23%) of stadia-going consumers drink it—well up on the national average (17%). Craft is a trend that sports venues have been slow to embrace, but it clearly offers huge potential, especially as it can often command a price premium over mainstream beer brands.

### Gin

Gin is the boom area of the spirits markets, and 17% of British adults now drink it—but the proportion among consumers who visit stadia is significantly higher at 21%. There is an opportunity for stadium bars to meet this latest demand, with premium, craft-style gins and accompanying tonics in particular.

### Sustainability

More than two thirds (69%) of BrandTrack respondents who visit stadia say they actively try to lead environmentally friendly lifestyles. With issues like climate change, plastic pollution and recycling high on the news agenda, that number will only increase, putting more pressure on all businesses to demonstrate their commitment to environmentally friendly operations. Venues that can prove the sustainability of their food and drink operations will have a head start.

### Service

Just as consumers' expectations of food quality have increased, so has their anticipation of good service. Friendly and knowledgeable service can make a huge satisfaction to consumers' satisfaction levels—but achieving it when many staff are temporary, part-time or inexperienced and relatively low-paid is a major challenge for many stadia operators.

### Localism

As in restaurants, it is vital for operators to understand the nuances of their local markets. Researching consumers' habits and drawing on nearby food and drink suppliers can be effective—especially in sporting environments where local allegiances are already very strong.



69% of BrandTrack respondents who visit stadia say they actively try to lead environmentally friendly lifestyles.

## The Design Brief

Harrison were asked by Derby County to create a contemporary restaurant and bar proposition within the new football stadium that would perform as well as any typical high street casual dining offer. The majority of the time the restaurant would not be supporting match day activities, therefore it was essential that we developed a solution which steered it well clear of typical sports bar fayre. The design solution was to create an offer that would very much stand up in its own right. The space had to, at times, cater for a significant volume of guests on match days and fewer guests during non-match days, requiring Harrison to develop a space that was agile, ergonomically effective and able to adapt based on capacity demands. The brands personality & ultimately its name drew on the heritage of the local area when it was predominantly train yards.

There were additional nuances to consider such as subdividing the large space to effectively deal with the significant peaks and troughs of demand along with the ability to apportion a space to provide events activities with its own service bar and close access to the kitchen facility. On match days, for instance, the sub-divided area nearest the pitch would be accessible only by a special combined premium match day/hospitality tickets. There was a significant challenge in separating the area whilst maintaining easy & legally acceptable access whilst forming a naturally appealing space.

A cool and contemporary restaurant and bar which delivers great food and drink, from its open cook line and visible display cellar whilst nodding to the areas local historical heritage. The result is that guests can enjoy any part of the space at any time of the day or week. Both sales and footfall have exceeded the clients expectations since opening.



# THE YARD @ DERBY COUNTY FC

# Grounds for Technology: How Digital Can Improve the Stadia Experience

Getting food and drink at a stadium during a game or concert has always been a pretty dispiriting experience: fight for space at a crowded counter and hand over your cash. But could technology help to transform the task, give consumers a much better experience and encourage them to spend more? Stadia around the world are starting to realise that embracing digital advances can make their F&B operations more efficient and more profitable.

The consumer demand for technology is clear. CGA's BrandTrack survey found that one in five (18%) stadium-goers cite poor **Wi-Fi** as one of their top three frustrations on their visits. A better signal would keep them happier—and it would unlock some of the many other benefits of web-based technology.

Tech can help in particular with a huge annoyance for consumers: long queues for food and drink. **Contactless and mobile-based payment** can shave seconds off transaction times, and already starting to shorten people's wait at counters. Some stadia in Europe have gone a step further and made sales completely **cashless**, or ask regular customers like season ticket holders to use **pre-paid cards** for their transactions. The risk here, though, is of alienating fans who still prefer to use cash.

Stadium **apps** that allow people to pre-order can also reduce wait times. Separate research by CGA for the Go Technology report earlier in 2018 found that 13.4 million British adults have used mobile apps to order or pay for food, and more than half (55%) think they have improved the overall experience.

**Click-and-collect** is particularly popular among millennials, who have grown up in a smartphone world and now expect this kind of convenience as standard. For example, the ability to order a round of drinks ahead of half-time, then have them waiting at express collection points as the whistle blows, could be hugely appealing to this demographic. **Delivery to seats**, while logistically tricky, might be even more popular.

Technology can help in stadia's restaurants, too. Many casual dining brands are now equipping servers with **hand-held tablets** for taking orders, relaying them instantly to kitchens and cutting wait times—particularly crucial in a time-pressured environment, where people's meals need to be finished by set times.

Aside from sales, digital technology can boost stadia's efforts to engage with customers. BrandTrack shows that stadium-goers are heavier than usual users of **social media**—61% of them say they check their feeds frequently throughout the day, compare to a national average of 55%—so platforms like Facebook, Twitter and Instagram are good places to tell them about the food and drink on offer, or communicate special deals. Cutting-edge CRM technology can meanwhile make email engagement more personalized than ever before, and smartphone-based loyalty schemes can encourage repeat visits.

Clearly, many of the solutions for improving the speed and quality of food and drink delivery will need to come from stadia designers and frontline teams—but there is no doubt that technology has an increasingly important role to play.

**55%** THINK MOBILE APPS HAVE IMPROVED THE OVERALL EXPERIENCE WHEN PAYING FOR FOOD



## The View from CGA

When British consumers think of eating and drinking at stadia, their impressions are often negative. With ordinary to poor food and drink quality, high prices and long waits, they can soon feel like captive customers and leave disappointed. The experience in hospitality boxes and VIP areas is much better—but it comes at a price, and is often the preserve of corporates rather than consumers.

But it shouldn't be like this. CGA's research shows that today's consumers are discerning and demanding, eating out more often than ever before and expecting high standards of food, drink and service and good value. Many stadia have not kept pace with this evolution in out of home eating and drinking, and are falling well short of their customers' expectations. The disconnect between what consumers think and what they actually get is growing.

As our report shows, things are starting to change. Some British stadia are starting to look beyond the conventional boundaries of food and drink, and on inspiration from modern sports venues in Europe, the US and elsewhere.

## The view from Harrison

The opportunity to enhance the guest experience and drive revenues in stadia is significant and wide ranging.

Harrison have partnered with CGA to complete a consumer-based research project to explore exactly what today's stadia customers think about the overall guest experience, the results of which have been enlightening.

The demographic of consumers visiting stadia has evolved, and therefore the stadia offering needs to evolve. We believe that by creating environments and service models that extend the visitors dwell time through enhanced hospitality experiences, increased premiumisation and greater choice, there is a clear opportunity. The US appears to be ahead of the curve, but as we know an NFL game is an all-day affair that often involves the whole family so the dynamic is very different. However, there are clearly lessons to be learned from the US. F&B will remain a key element, but overall shouldn't stadiums be looking at how to increase guest dwell time and offer other activities, rather than just get people in and out as quickly as possible?

But much more room can be done to improve consumers' stadia experiences. Our experience in the casual dining sector shows us there is enormous potential in the middle ground of stadia catering: for premium but informal hospitality somewhere between hot dog stalls and fine dining restaurants. There is untapped demand for fresher, healthier food, for better and more distinctive drinks, and for slicker, more sustainable operations. Technology solutions add even more ways to make life easier for stadia guests.

Providing food and drink in the stadia environment isn't easy: the challenges of high volumes, limited time and restricted space are significant. But even small improvements to catering can make a big difference to people's perceptions, encouraging them to come earlier, dwell longer and spend more. If the offer is right, consumers are prepared to make food and drink a much greater part of their experience—and that translates into higher sales and profits for stadia operators. As ever, properly understanding the public's needs and habits will be key to unlocking more sales in the future.

There are significant learnings to be had from high street brands, which we know form part of the stadia audience's portfolio of leisure dining experiences. In fact, many in the fast casual and QSR sectors which are the service styles that are most appropriate to a stadium visit.

We have also experienced a general shift to a more relaxed social eating approach across the hospitality sector, from fast food to premium dining experiences, and this plays well to the needs and expectations of guests at all levels in a stadium environment.

There are so many areas of potential to be explored and exploited for guest and revenue enhancement, the latter being so critical when stadiums are so capital intensive yet operate for limited time periods throughout the year.



PHENOMENAL DATA. EXPERT INSIGHT.

CGA is the world's leading business intelligence and strategic consultancy provider for the out of home leisure market: the definitive source of integrated consumer insight and market measurement informing strategies for our clients' growth. We live, love and breathe our industry, harnessing our passion and knowledge to help the market make smarter and more informed decisions. CGA works closely with consumers, retailers, suppliers, trade bodies and government so that our expert consultants can bring every strategic insight to life.

For more about CGA and how it can help businesses across the out of home eating and drinking sector, visit

**CGA**

**T:** +44 (0)161 476 8330

**W:** [www.cga.co.uk](http://www.cga.co.uk)

**E:** [hello@cga.co.uk](mailto:hello@cga.co.uk)

# Harrison.

Harrison is a multidisciplinary, strategic design and customer experience consultancy with broad cultural and international experience, who work exclusively in the leisure, entertainment, hotel and hospitality sector.

Creatively driven. Passionate. Provocative. We are an independent company obsessed with telling beautiful stories for brands simply designed for people. We combine strategic understanding with intuitive creativity to create and enrich compelling brand character. We work with clients such as Wembley Stadium, The London Stadium, Derby County, Nando's and Hard Rock Café.

**Harrison**

**T:** +44 (0)20 7046 6556

**M:** +44 (0)7799 871819

**W:** [www.harrison.hn](http://www.harrison.hn)

**E:** [Richard@harrison.hn](mailto:Richard@harrison.hn)