

## Primary Goal:

Provide ALSD members with data points to assess the industry as a whole and benchmark their relative status within it

## Key Focus Areas:

- Assess the current state of the luxury seating industry
- Benchmark member performance on key premium KPIs
- Understand customer preferences and evolving expectations
- Evaluate operational practices and innovations

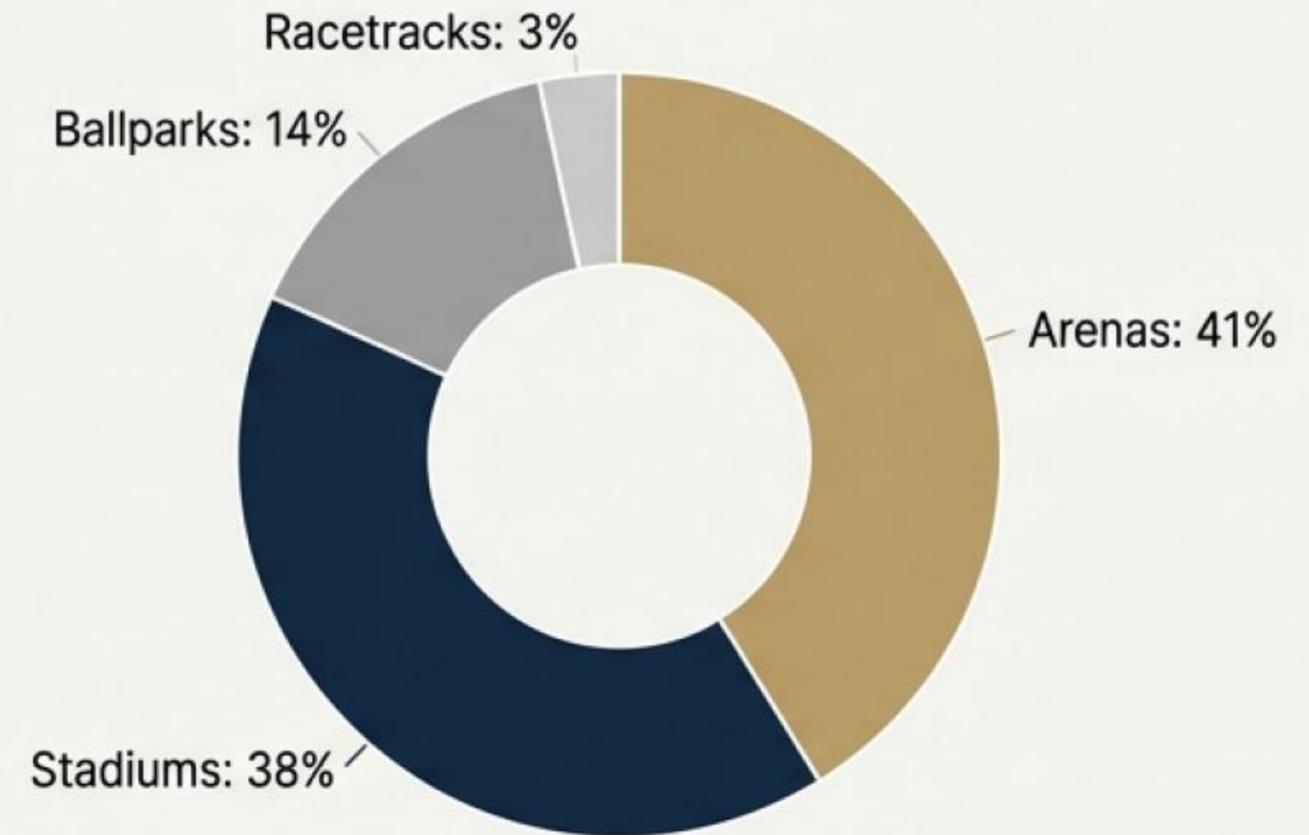
## Total Responses:

76 industry venues

## Key Definitions:

Suites seat 9+; Loge/Ledge/Opera Boxes seat 4-8; and Luxury Lounges are distinct areas that seat 25+

## Venue Type Breakdown



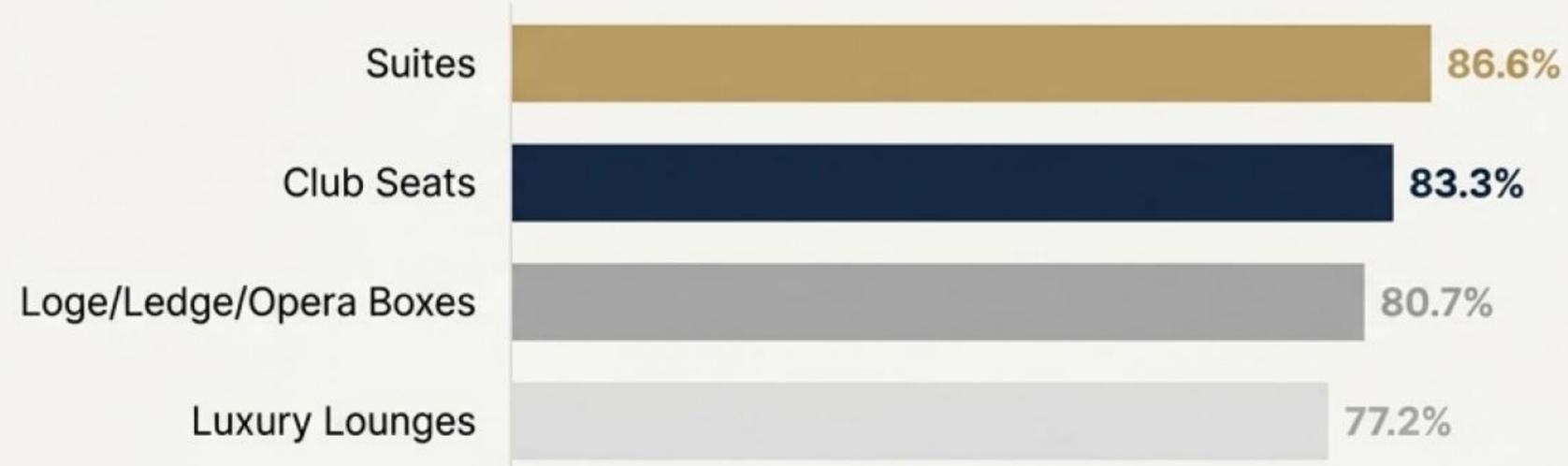
\*Note: No responses were recorded for amphitheaters or theaters in this survey cycle.\*

## Premium Remains a High-Demand Product

# 81.9%

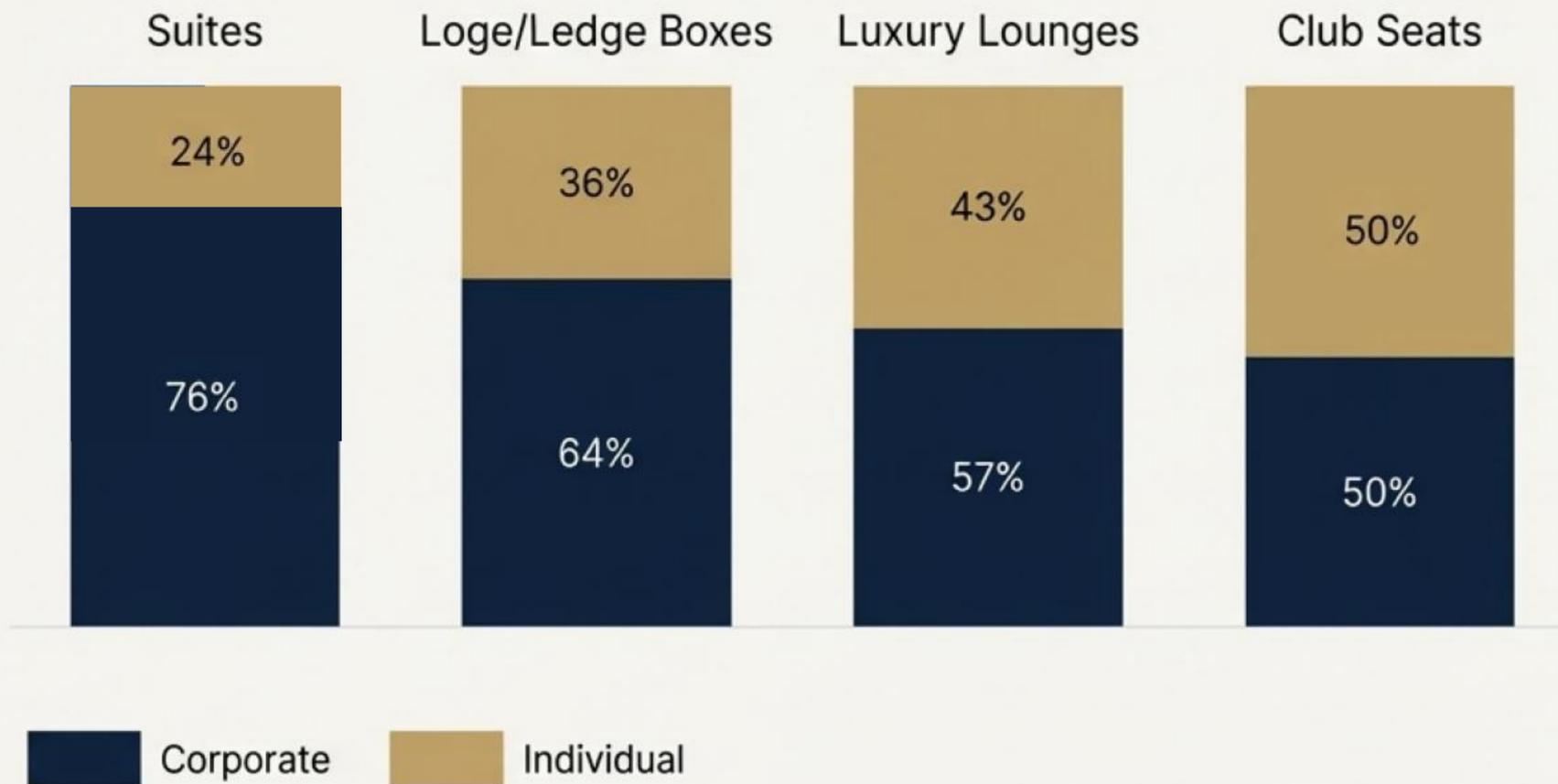
Average Premium Seating Inventory Sold Out Annually

Breakdown by Product Type



**Key Takeaway:** Despite economic variables, premium products are consistently at or near capacity. Suites lead the pack in sell-through, validating their position as the anchor of premium offerings. Loge boxes, a newer product, show robust demand comparable to established categories.

## Suites are still a Corporate Powerhouse while Club Seats Attract a More Balanced Audience



**Strategic Implication:** The data confirms distinct market segments. Suites and Loges are primarily B2B products, driven by corporate networking and entertainment needs. The 50/50 split in Club Seats suggests a broader market appeal, likely due to a more accessible price point, making it a key B2C growth area.

## Flexibility in Contracts and a Core Set of VIP Amenities Define the Current Premium Package

### Most Common Contract Terms Offered



\*Other options like 2, 4, 6-10+ years are offered significantly less frequently.\*

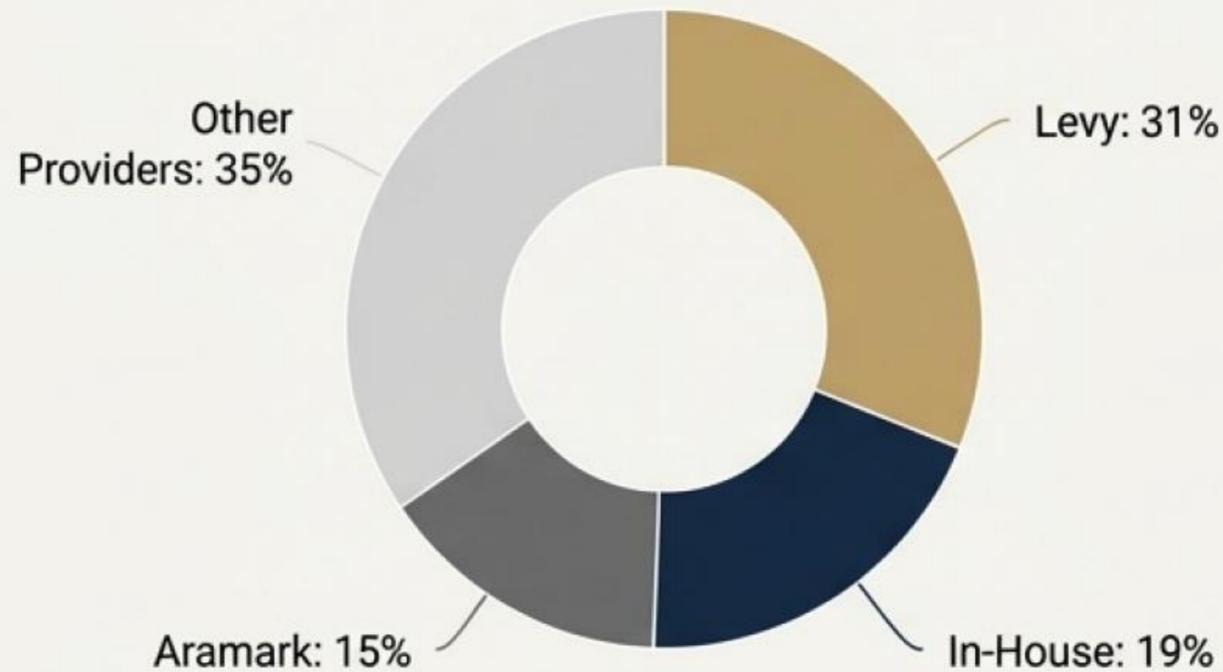
### Top Tier Benefits & Amenities Included



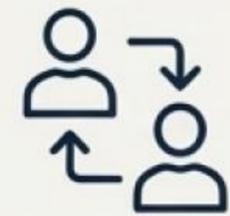
**NOTE:** 78% of venues also permit clients to customize the decor of their suites, reinforcing the feeling of partnership vs. tenancy.

## Hospitality Operations are Dominated by Third-Party F&B Providers and Lean Sales/Service Staffing Models

### Premium Food & Beverage Provider Landscape



### How Venues Structure Their Teams



# 64%

have separate Sales and Service teams.



**Sales Team Size:** 45% of venues have just 1-2 dedicated premium sellers.



**Service Team Size:** 48% of venues have 1-2 full-time premium service staff.

## AI Adoption in Premium is in its Nascent Stage, with Measured Enthusiasm

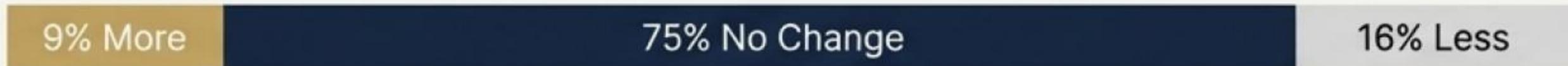
### AI for Sales & Marketing

- **Adoption Rate:** 40% of respondents use AI.
- **Most Cited Tool:** WolfCycle.
- **Success Rating:** 3.08 / 5.0



### AI for Customer Service

- **Adoption Rate:** 10% of respondents use AI.
- **Most Cited Tools:** Satisfi, Conversica.
- **Success Rating:** 3.5 / 5.0



**NOTE:** Two-thirds of respondents reported **NO CHANGE** in audience engagement when using AI-generated marketing content.

# ARENA Benchmark: A Clear Divide in Pricing and Revenue Between Pro and Non-Pro Venues

## Club Seats

**Revenue Surprise:** 38% of all arenas generate >\$20M from club seats. This jumps to **62%** for arenas with NBA/NHL tenants.

**Price Range:** A “dumbbell effect” for pro arenas, with 22% charging \$7.5k-\$10k AND 22% charging \$25k-\$30k annually.

## Suites

**The \$200k Line:** **100%** of NBA/NHL arenas price annual suite leases above \$200,000. All other arenas price theirs below \$200,000.

**Typical Inventory:** 56% of pro arenas have 41-60 suites.

**Revenue:** Only 12% of all arenas (25% of pro arenas) report >\$20M in suite revenue, often less than their club seat revenue.

## Emerging Products

**Loge Boxes:** Less common; 32% of arenas have none.

**Luxury Lounges:** Growing but not standard; 42% have none. Even among pro arenas, 33% have none.

**Typical Arena Capacity:** 53% are 15,001-20,000 seats **Key Tenants:** 40% host an NBA or NHL team

# STADIUM Benchmark: NFL and College Football Drive Massive Scale in Both Inventory and Revenue

Metric	<u>NFL</u>	<u>College Football</u>	MLS
Club Seat Revenue > \$10M	<b>71% of venues</b>	<b>54% of venues</b>	23% of venues (53% <\$1M)
Suite Inventory	100 - 150	50 - 100	25 - 50
Suite Pricing (Annual)	\$250k - \$400k+	\$75k - \$200k	\$50k - \$150k
Suite Revenue > \$10M	<b>79% of venues</b>	<b>68% of venues</b>	13% of venues (62% <\$5M)

**Typical Stadium Capacity:** 36% are 60,000-70,000 seats **Key Tenants:** College Football (48%), MLS (38%), NFL (33%).

# BALLPARK Benchmark: A Mature Market Focused on a Core Offering of Suites and Club Seats

Club Seats	Suites	Newer Products
<p><b>Inventory:</b> 73% have between 1,000 - 3,000 club seats.</p> <p><b>Revenue:</b> A strong performer, with 36% of ballparks generating <b>\$20M+ annually</b>.</p> <p><b>Pricing:</b> Wide variability with no single dominant price tier, suggesting pricing is highly market-specific.</p>	<p><b>Inventory:</b> Typically designed for mid-sized groups; 54% seat 16 or 20 people.</p> <p><b>Pricing:</b> Also highly variable; 27% lease for \$125k–\$150k and another 27% lease for <b>\$250k+</b>.</p> <p><b>Revenue:</b> 27% generate more than \$25M annually from suites.</p>	<p><b>Loge Boxes:</b> Scarce. <b>36%</b> of ballparks have none.</p> <p><b>Luxury Lounges:</b> Rare. <b>64%</b> of ballparks have none.</p>

**Typical Ballpark Capacity:** 72% are 30,000+ seats **Key Tenants:** Primarily Major League Baseball.

# A Snapshot Of The RACETRACK Market Reveals A High-Capacity, High-Revenue Model

**NOTE:** Racetrack insights are based on a limited sample size and should be considered indicative rather than comprehensive.

-  **Massive Scale:** Venues reported capacities ranging from **60k** to over **200k**.
-  **Extensive Inventory:** Club seats numbered in the thousands (**1k-5k+**) and suites in the hundreds (**50-300+**).
-  **Significant Revenue:** Both respondents reported annual club seat revenue **over \$3M** (one over **\$10M**) and suite revenue **over \$10M** (one over **\$50M**).
-  **Product Gap:** Neither respondent reported having any loge, ledge, or opera boxes.