

PNC Park

Analytics to Action

VENUE ANALYSIS – PNC PARK

Speed of service and **Quality** are rooted in optimal **Supply and Demand** ratios. Our pressure tested methodology strikes the balance of enhanced service and elevated menu offerings

Areas of focus for PNC Park transformation

Reengineer Fan Experience

Efficient Operations

Revenue Growth

Supply and Demand

Speed of Service

Quality & Service

APPROACH



INSIGHTS

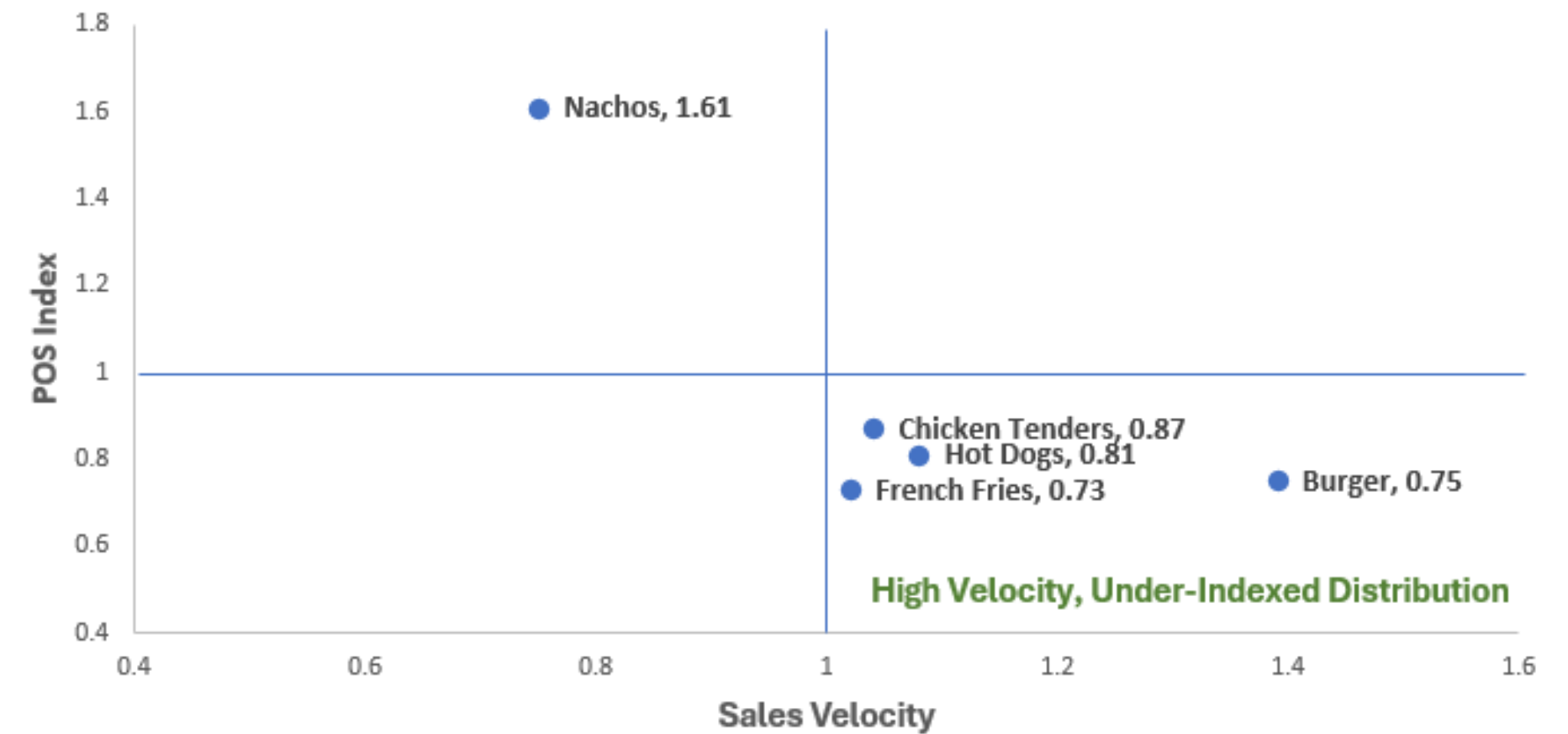
Portfolio Benchmarking

Approach: Index food and beverage categories against MLB venues, identifying gaps in supply vs. demand

PNC under-indexed in branded items and stands

	PNC	MLB 1	MLB 2
Items	36%	48%	56%
Stands	23%	38%	59%

Example, Main Meals Supply v. Demand Analysis



Location Optimization

Approach: Within stand styles, Identify locations that underperformed on volume, average check, sales/point-of-sale

4X

Gap between top performers and bottom performers

TOP 11

Food Stands had Cooking Capabilities

2X-3X

Speed of Service for Grab and Go locations with Tech vs. Standard Fan Favorite Locations

Research

Approach: Combine food service industry, sports industry, and Pirates internal survey to draw out insights on fan preferences.

79%

Of consumers find that **Taste** is most important to F&B Value

80%

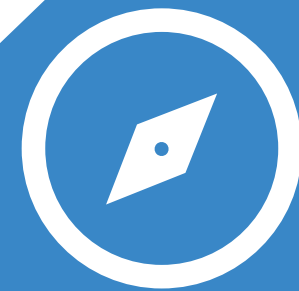
Pirates fans that chose **Quality** as most important when purchasing

30%

Of consumers say **Variety** will increase repeat purchases

Recommendations

- Expansion of grab and go
- Expansion of technology
- Introduce new concepts in key categories
- Investment in BOH capabilities to increase distribution of key categories



ROI Projections

- Estimate top line opportunity based on portfolio case studies, industry benchmarks, PNC Park historical analysis
- Top down and Bottom up



Measurement + Optimize

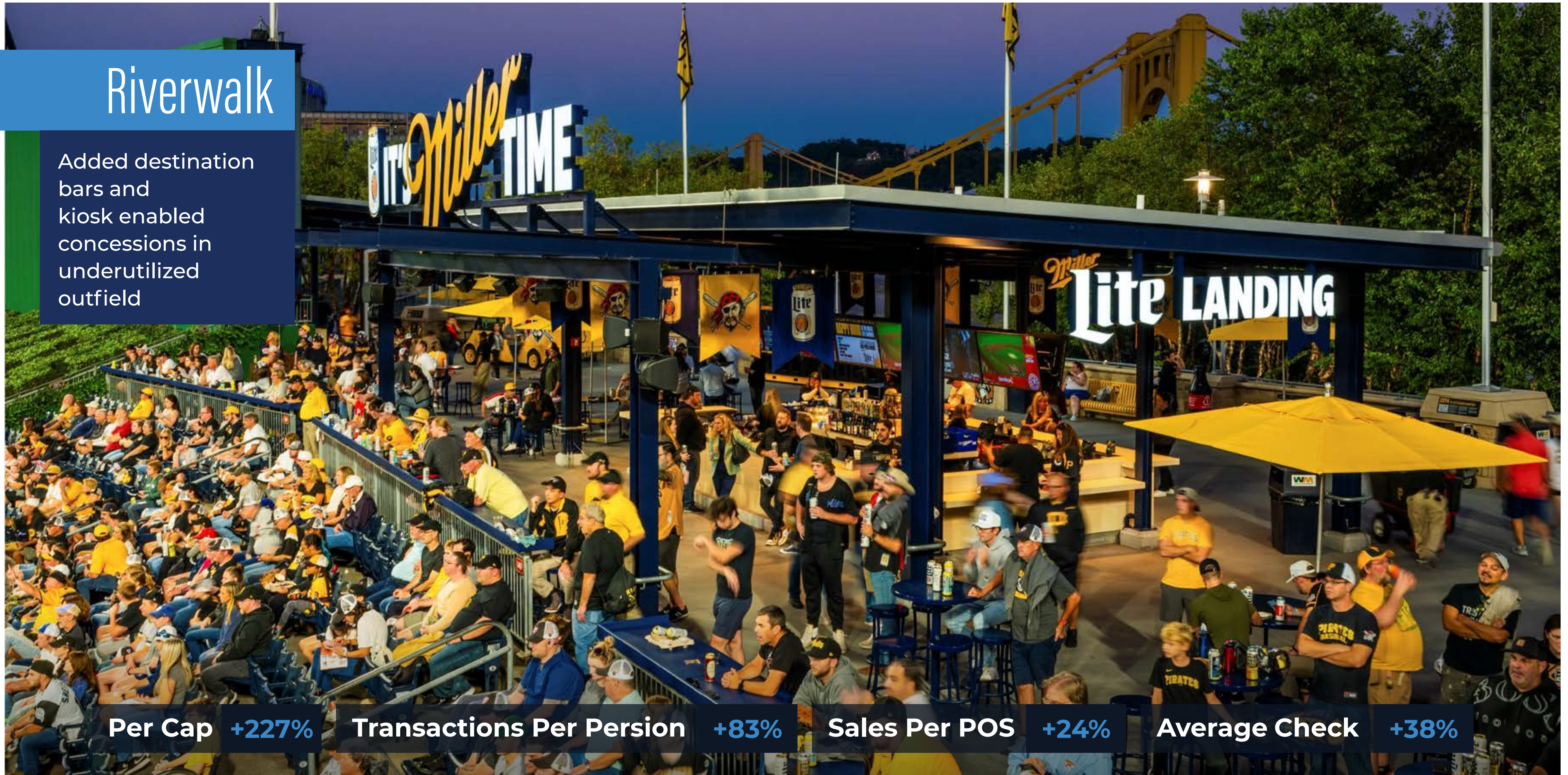
- Measure performance and tweak where applicable
 - Performance against projections
 - Speed of Service benchmarks
 - Fan experience benchmarks





Riverwalk

Added destination bars and kiosks enabled concessions in underutilized outfield



Per Cap **+227%**

Transactions Per Person **+83%**

Sales Per POS **+24%**

Average Check **+38%**

Riverwalk bars are #1 and #2 performing bars in the ballpark

Fan Favorites Express

Introduced two grab and go, Mashgin enabled core food concessions to reduce concourse congestion, drive speed and expand beverage variety and availability

Throughput vs. Belly-up

+51%

Throughput vs. PY

+23%

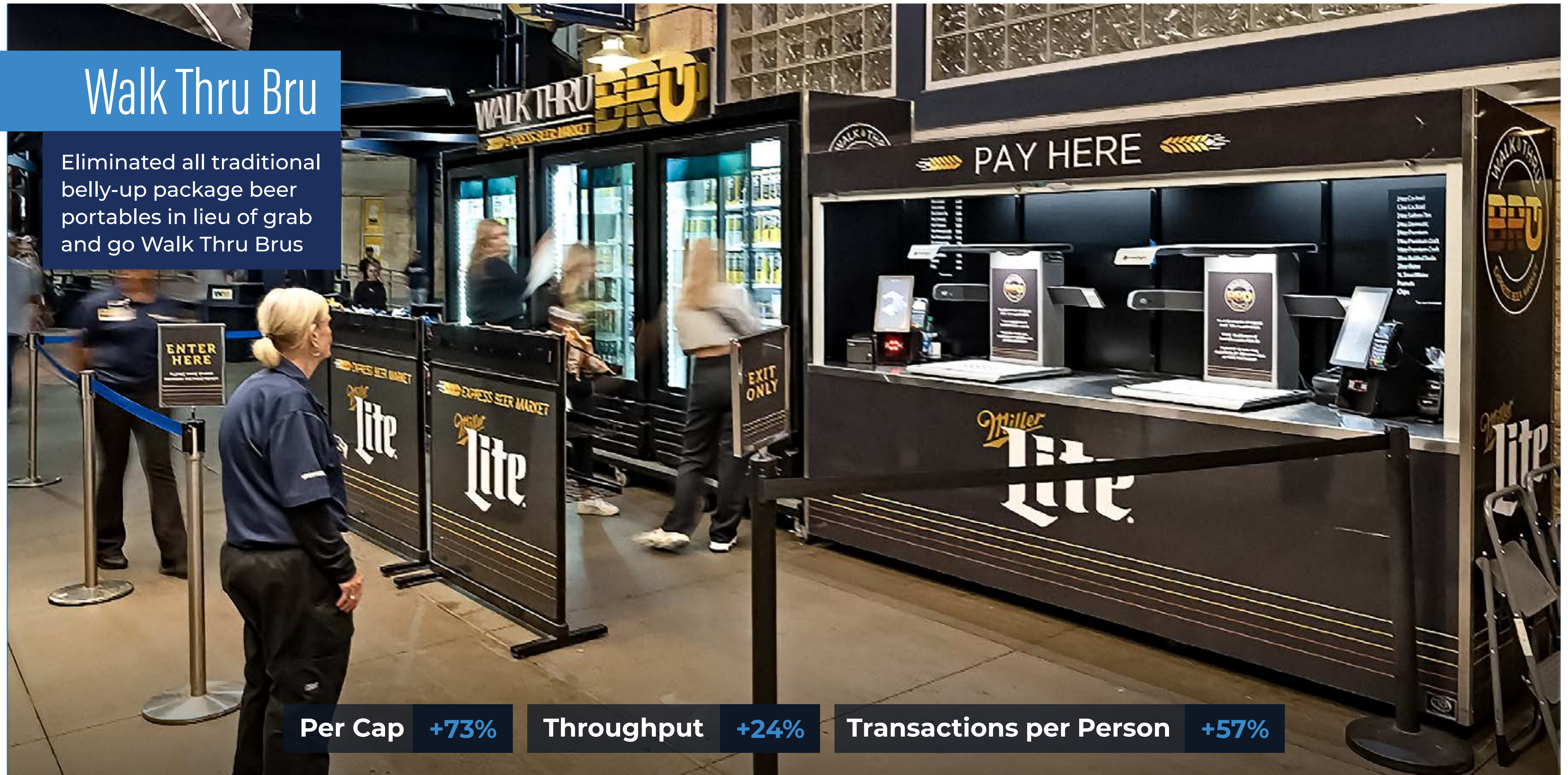
Peak Transactions per Game

+20%

Both locations in top 5 throughput stands in building

Walk Thru Bru

Eliminated all traditional belly-up package beer portables in lieu of grab and go Walk Thru Brus



Per Cap +73%

Throughput +24%

Transactions per Person +57%

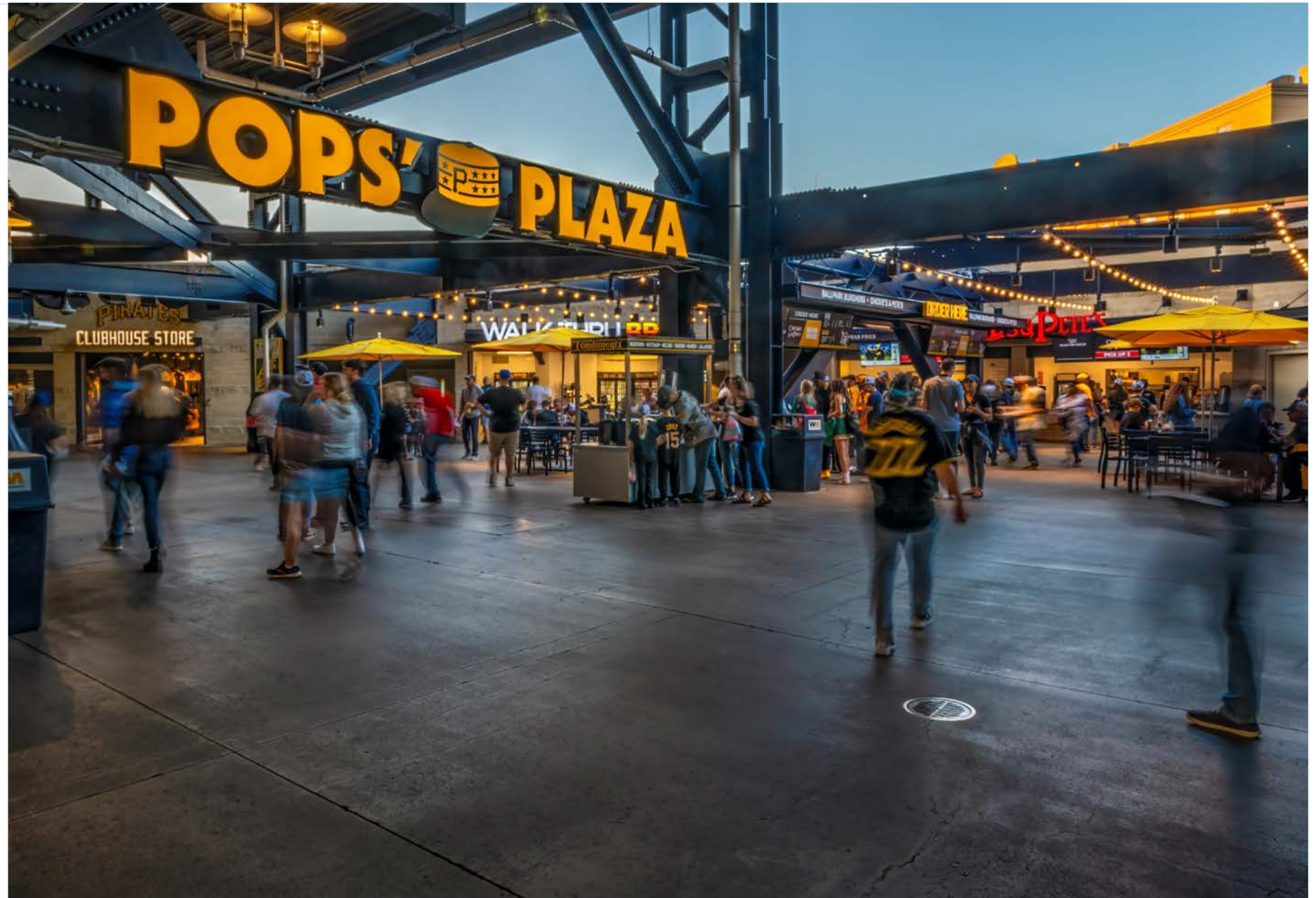
Reduced total number of beer portables on concourse by 40% | Expanded variety led to +130% liquor per cap at beer portable locations

Pops' Plaza

Re-concepted key concessions and added self order and self-checkout technologies

- Throughput +45%
- Transactions per person +17%
- Sales +64% at food-forward, kiosk enabled locations
- Sales +94% at beverage-forward locations

Contributed to a 25% lift in sales in the third base cluster



MAIN CONCOURSE
SALES

UP 36%

MAIN CONCOURSE
TRANSACTIONS

UP 27%

CONVERSION OF ALL
BEER PORTABLES TO



PEAK TRANSACTIONS

UP 59%

FAN FAVORITES EXPRESS

210% THROUGHPUT

vs. BELLY-UP FAN FAVORITES

ELEVEN

**MASHGIN
ENABLED**

GRAB & GO LOCATIONS

F&B LOCATIONS

**32%
TECHNOLOGY
ENABLED**

IMMERSE

We are a boutique consulting firm, backed by decades of expertise and unparalleled resources. Our team of seasoned, subject matter experts are the best in the business and share a mutual interest in “fan first”. From our inhouse data scientists to exceptional operators to marketing gurus, we are **passionate**, we are **nimble**, we are **dedicated**, and ultimately, **we win when you win.**

The Path



DEFINE + DISCOVER



SOLVE



DESIGN + DEVELOP



ACTIVATE