

STADIUM

TECH REPORT

SUMMER 2023



AN AMBITIOUS ORDER:
CITYPARK'S RECIPE OF NEW
TECHNOLOGY AND ALL-
LOCAL FOOD PROVIDERS IS A
CONCESSIONS WINNER

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STADIUM TECH REPORT

Welcome to the second issue of our TENTH year of STADIUM TECH REPORTS, the Summer 2023 issue!

These long-form reports are designed to give stadium and large public venue owners and operators, and digital sports business executives a way to dig deep into the topic of stadium technology, via exclusive research and profiles of successful stadium technology deployments, as well as news and analysis of topics important to this growing market.

This issue we are trying something new, with one extremely in-depth report on the innovative concessions operation at CityPark in St. Louis, the new home for the Major League Soccer expansion team, St. Louis City SC. We hope you enjoy our in-person visit insights as well as several individual interviews with the local food providers who make up 100 percent of the stadium's food options.

We'd like to take a quick moment to thank our sponsors, which for this issue include Verizon, MatSing, Boldyn Networks (formerly Mobilitie), JMA, Boingo, CommScope, American Tower, and AmpThink. Their generous sponsorship makes it possible for us to offer this content free of charge to our readers.

We'd also like to welcome members of the The Association of Luxury Suite Directors (ALSD) and the International Association of Venue Managers (IAVM), who now have access to Stadium Tech Report content. We'd also like to welcome readers from the Inside Towers community, who may have found their way here via our ongoing partnership with the excellent publication Inside Towers.

As always, we are here to hear what you have to say: Send me an email to kaps@stadiumtechreport.com and let us know what you think of our STADIUM TECH REPORT series.

Paul Kapustka, Founder & Editor
Stadium Tech Report



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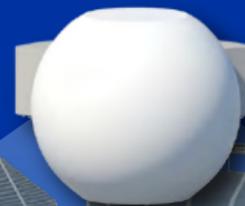
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Paul Kapustka

LOCAL-PROVIDER CONCESSIONS IN ST. LOUIS LOOKS LIKE A WINNER

After just 10 home games it's probably too early to call it a complete success, but our impression so far is that the 100 percent local-provider concessions operation at CityPark in St. Louis looks like a winner, with facets that other teams might want to duplicate at their own venues.

To us, the all-in combination of great local food and forward-looking technologies is a perfect marriage. Even while MLS expansion team St. Louis City SC and its food providers work their way around the inevitable first-time challenges of the innovative operation, it's clear that the structural decisions make sense and should be looked at as examples of how other venues might use technology to enhance the fan experience — without making it all about the technology.

Here's a quick take on what we see that works in St. Louis, from our

in-depth reporting as well as our personal visit to a home game in June:

1. LOCAL FOOD WORKS

Bringing local food providers into stadiums is not something new — pretty much every stadium we know has at least one or a few signature local dishes, ones either from loved providers from the host city, or stadium versions of treasured local dishes.

But having 100 percent local providers, which is what CityPark has, is (as far as we know), unique. And we think it is a decision that resonates beyond just the enticing

sights and smells of craft-style cooking.

First of all, local food seems to come with a built-in promotional value, the kind of attraction that makes people love small hometown places or innovative tastes found at enterprising food trucks. People go out of their way to find the good food they love, and making it available in a stadium setting means that fans who already know the provider will seek them out on game day, something that has to be helping provide more concession sales than normal.

Allowing the owners and operators of the food establishments to run the stadium stands (instead of concessionaire staffers) also is a great decision, since those people know best on the hows and whys of what made their food attractive in the first place. While dealing with stadium technologies, especially CityPark's order-ahead app, can be a challenge, there can't be too many business more ready to adapt than small restaurants, which have needed to overcome many hurdles in the past few years just to survive. And even if fans have never heard about the providers before, the fantastic presentation at most of the stands at CityPark provides an instant lure to a hungry eventgoer. Enthusiastic operators smashing down fresh ground beef onto a grill sizzling with burgers and bacon, others rolling fresh hot tortillas

for tacos are easy enticements for fans to order more. And the integration of technologies like the order-ahead app and checkout-free stands means that even at the most desirable stands, lines never get too long. And if one line is too long, there are many more local choices to pick from, not just one or two alternatives to the sometimes bland stadium fare.

2: FIND THE RIGHT TECH FOR THE SITUATION

Like venues everywhere else, CityPark is still working its way through trial and error to find the right technology fit for each separate food provider. But out of the gate, the team seems to have planned well with its mix of different technologies that provide separate comfort levels for both providers and customers.

One example is the team's order-ahead feature in the team app, which currently has 10 providers participating. According to the providers we interviewed, figuring out how to balance food production flow between the instant app orders and the orders coming from in-person lines is a hard challenge. But for those who are up to it, the additional orders are also a business bonus. According to CityPark, the app orders can account for 20 to 40 percent of a stand's total orders. The stadium's three checkout-free stands, powered by technology from

Zippin, are another technology that seems to be growing in acceptance from both providers and fans. While some fans may take a few more visits to warm to the much-different shopping experience checkout-free presents, others are already catching on and checking out more frequently.

According to the team, they are currently seeing 33 percent repeat customers at the checkout-free stands, a stat that has the team already looking to add more checkout-free stands as quickly as they can. One possible option is the "Zippin Lane" configuration, which is more streamlined and drink-focused than the current stands, which all have a hot-food kitchen area as part of the offering.

3: CHANGE THE BEHAVIOR

Even the best food and the fastest technology might not be enough to overcome traditional fan behavior of showing up at the last minute before kickoff, or waiting until the halftime whistle blows to try to get food and drink. One of the big factors in the food-program success at CityPark seems to be fans responding to the team's efforts to get people to the stadium early, and using the app when possible to avoid standing in lines.

Just asking fans to arrive early probably isn't enough. That's why St. Louis, like many other venues, is using enticements like

DJs and bands playing on a plaza space outside the stadium during pregame times, creating a sort of team-sponsored tailgating environment. By providing pregame entertainment the team helps make showing up early part of the event — and by having many choices for great food available, it's easier to convince fans that getting there early is a good use of their time.

Order-ahead apps and express-pickup windows are another innovation that many teams have tried in some form or fashion, but pairing them with high-level food options and spacing them widely around the stadium as St. Louis has seems to contribute to a higher level of participation. The fact that the team also created its own app from scratch to make sure the order-ahead program worked at a high level is also a likely contributor to the program's fast adoption.

While things like local food providers and advanced concession technology are in place at many other venues, the level of commitment to both sides of that equation and the attention paid to their combination is what makes the difference at CityPark.



AN AMBITIOUS ORDER:

How CityPark uses technology to make its amazing all-local, sustainable, concessions operation work



CityPark's east-side plaza is a prime pregame gathering spot. Credit this photo and cover: St. Louis City SC

\\ BY PAUL KAPUSTKA

What's one of the toughest tasks for any soccer stadium? It's trying to figure out how to get food and drink in fans' hands inside the narrow available windows before and during the matches. For any team, it's a hard-to-balance puzzle, trying to match concessions performance with traditional fan behaviors, like tailgating right up until kickoff, as well as the short 15-minute halftime break window.

But at CityPark, the new venue for Major League Soccer expansion team St. Louis City SC that opened earlier this year, the owners and operators added more degrees of difficulty to their planned food operations: Not only would the stands solely use food from local providers, all operations would also be highly sustainable, with a comprehensive recycling and composting effort and no single-use plastics like water bottles. And the program would also be very tech-forward, with innovations like an order-ahead program in the team app, self-serve kiosks, and checkout-free stands, using technology from Zippin.

“Our philosophy for food in general was to connect in an emotional way with fans,” said Matt Sebek, chief experience officer for City SC. “Food is very communal,

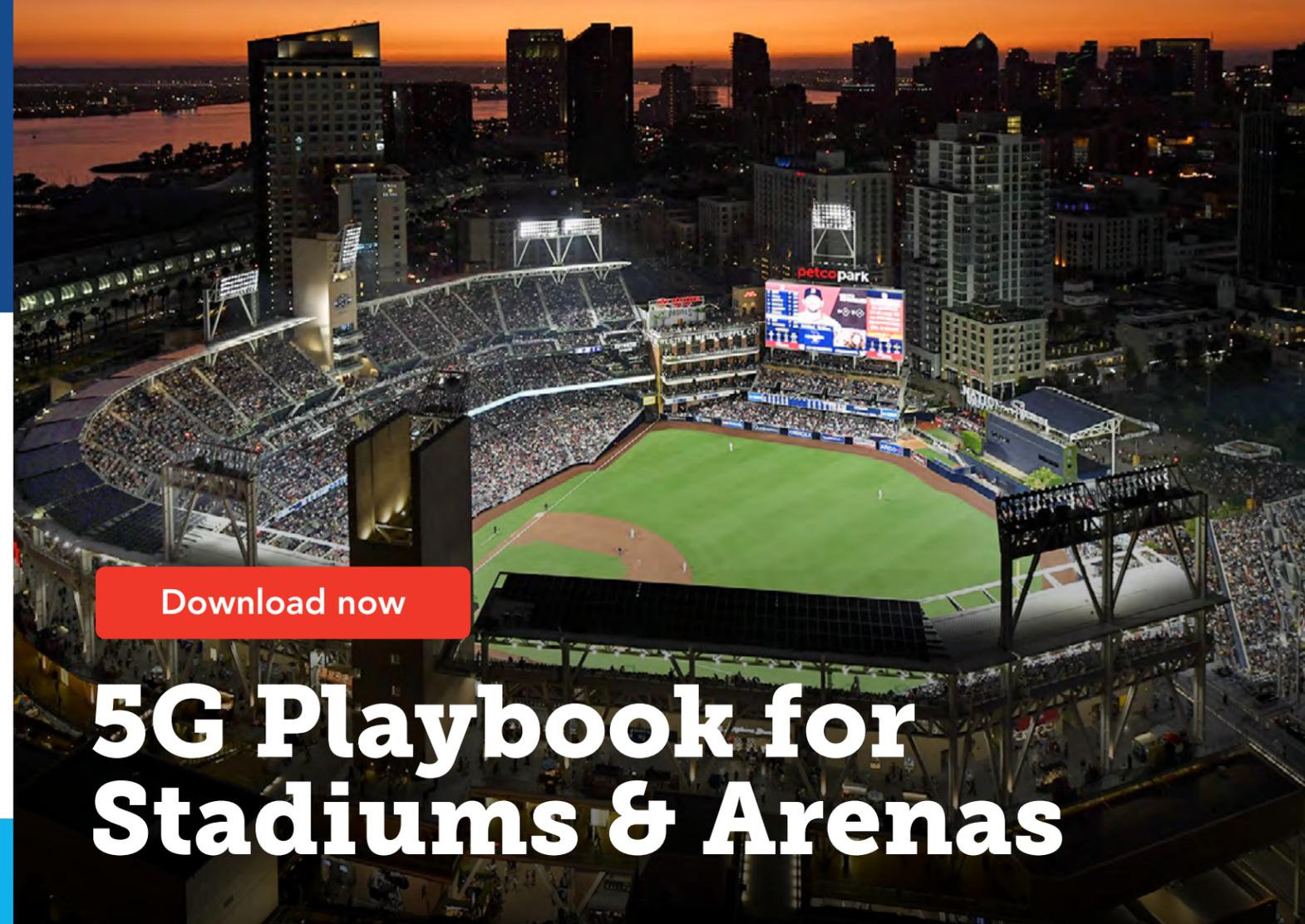
as are sports, and if we wanted to do it, we wanted to do it well.”

During a recent visit to CityPark, Stadium Tech Report was able to see the concessions operation in action. Like anything new there were some visible rough spots, but overall it was well received by the sellout crowd in attendance, who arrived early and jammed stands all around the stadium, seeking food and beverage from one of the 25 different local providers.

With many of the stadium providers being small operations like food trucks or small restaurants, scaling up to meet the volume and pace of a stadium crowd has been a challenge, according to several of the providers we talked to. But it’s also been profitable, they said, as well as exciting, being part of something that builds on



Early-arriving fans jam the CityPark concourse well before kickoff to find food and drink. Credit all photos (except where noted): Paul Kapustka, STR



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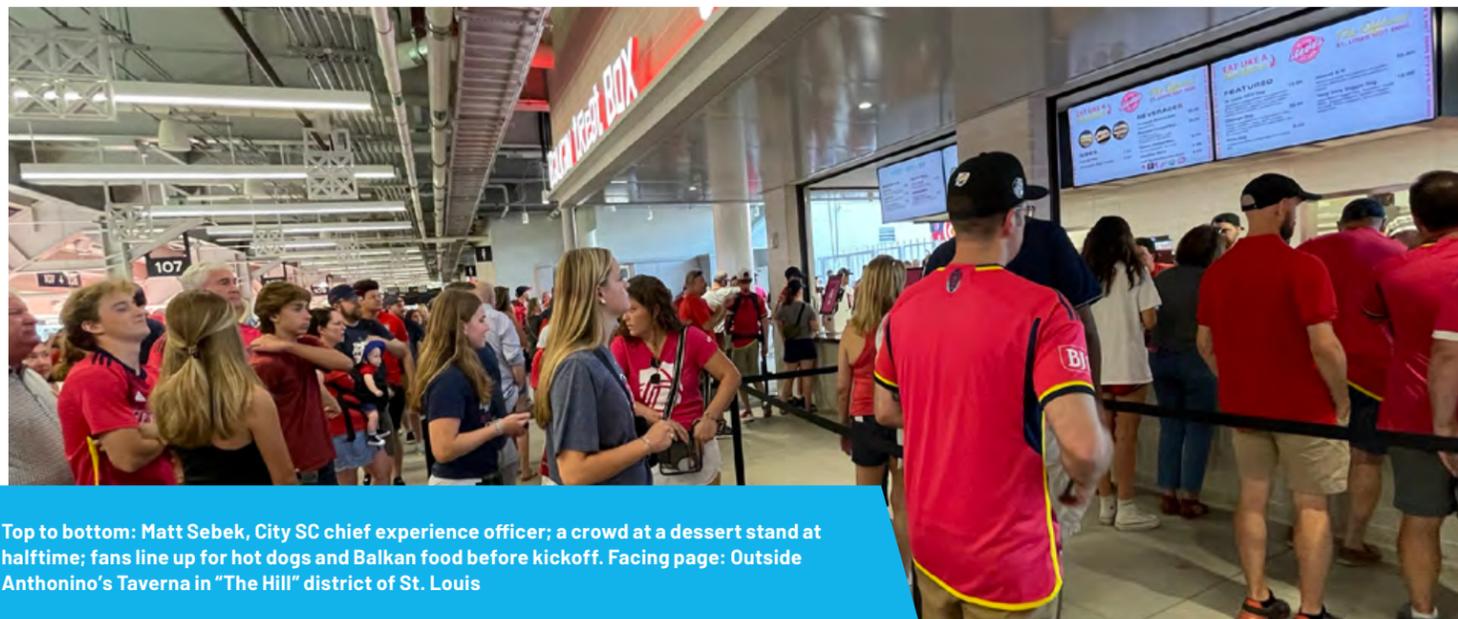
the community feeling St. Louis City SC is clearly trying to create with every facet of the team's operations.

And as any fan knows, outside of the team's on-field performance there's probably nothing more important to the game-day experience than what kind of concessions are available, and how easy it is to procure them. Throwing a large number of highly different food offerings and new-technology ordering methods at a first-time provider base and a first-time stadium crowd may have not been the easiest path to success, but judging by a short impression of the providers and consumers, it's already a favorable part of attending a match at CityPark.

According to CityPark, fans are embracing the technology and ordering early, with 60 percent of sales taking place before kickoff — early proof that the plan is a good one.

"I think our food program here was the hardest possible way you could do it," Sebek said with a laugh during an interview just before a recent home game, talking about the three goals of being 100 percent local, environmentally responsible and tech-forward.

"Any one of those three things is hard, by itself," Sebek said. "And all three of those things working in harmony has been a challenge. But it's one I think our fans have really embraced head-on."



Top to bottom: Matt Sebek, City SC chief experience officer; a crowd at a dessert stand at halftime; fans line up for hot dogs and Balkan food before kickoff. Facing page: Outside Anthonino's Taverna in "The Hill" district of St. Louis

PART 1:

THE IDEA: GREAT FOOD + GREAT TECH = A GREAT FAN EXPERIENCE

For a first-time St. Louis visitor, it doesn't take much asking around to find a must-try place for dinner. Just go to Anthonino's Taverna, the best-known spot on "The Hill," an old neighborhood with family-style Italian places to the west of downtown. The fact that on a Tuesday night there's an hour wait for a table means that its popularity isn't just a rumor: Local folks show up in force for Anthonino's eclectic and extensive menu, which has not just the famous St. Louis classic, Toasted Raviolis, but all the Italian favorites as well as a long list of Greek options, a reflection on the owners' parental heritage — an Italian father and a Greek mother.

Guy Fieri gave the restaurant a boost in popularity with a fun review on his [Diners, Drive-Ins and Dives](#) show in 2007 (Episode 9), and the restaurant got another TV profile earlier this year on the Secret Sauce show on A&E. But the place stands on what it delivers every night: Great food in a warm, friendly environment. The question is: How do you bring the essence of a restaurant like Anthonino's to a stadium, where a wait of anything longer than a minute or two is out of the question?

And why would you even try? While almost every stadium these days has a small number of local or specialty items, the balance of offerings at most stands in most places is somewhat anonymous, just your basic "stadium favorites" of hot dogs, nachos, popcorn and peanuts. But according to St. Louis City SC chief experience officer Matt Sebek, doing things the way they'd always been done was not the motivating factor for the city's newest stadium.

"Fans wanted [the new stadium] to be the first of something new, and not the last of how venues were done before," Sebek said.

What did that mean on the food side? How about hiring a "Chief Flavor Officer" who is a James Beard Foundation award-winning chef? And using only local food providers for 100 percent of the concession offerings?



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“We wanted variety, and the best St. Louis has to offer,” said Sebek. “And great local food is so desirable.”

After spending almost an hour talking to bartenders and other patrons while we waited for a table to clear at Anthonino’s, Stadium Tech Report was able to experience some of the taste that keeps people coming back to the place. A pizza with roasted red peppers and chunks of salami was superb, with a crust that was light and bready on top but solid enough underneath to let you pick up a slice with ease.

Inside CityPark, Anthonino’s stand is one of the three stands using checkout-free technology from Zippin, which allows fans to simply swipe a card or scan an app, select their items, and walk out, with payment taking place later online. The Anthonino’s stand is also located directly behind the supporter’s section of the stadium, where the die-hard fans typically stand all game and are more likely to want the fastest transaction possible so they can get back to cheering and chanting. That’s a lot of pressure for a first-time concession operation.

Unlike other sports like American football or baseball, soccer doesn’t have built-in breaks — it’s just 90 minutes of action split by one 15-minute intermission. In the past, we’ve seen soccer stadiums try to

accommodate fans by doing things like setting up pre-poured beer cups just before halftime to try to speed up the service.

New concession technology, like the checkout-free stores or self-serve checkout kiosks and terminals, have helped speed concessions operations overall at many stadiums, with more adopting the new technology every day. But almost every one of these deployments we’ve seen is a stand built and run by a national concessionaire,

typically with canned drink offerings and maybe some snacks or a few hot items. None that we are aware of feature local food providers, who also staff the stands with their own employees.

Add in the extra challenge of trying to integrate online order-ahead requests made through the team app (which 10 of the providers at CityPark currently support) and you have a tall task for providers who are used to



The famous “toasted ravioli” from Anthonino’s Taverna. Credit: Anthonino’s Taverna

While we didn’t sample the famous toasted raviolis (at Anthonino’s they contain “ground beef, ricotta and pecorino romano cheese”), we saw a couple at a nearby table attack an order with vigor, dipping them into the provided marinara sauce. With the friendly service from the hosts to the bar staff to the servers we had an excellent overall experience at Anthonino’s cozy street-corner place. But our work question would be — could you do all that on stadium time?



Fans line up to enter the Anthonino's Taverna checkout-free stand at CityPark

taking customers in at their preferred pace. Safe to say, there's no room for an hour-long wait at the Anthonino's stadium stand. Instead, it's completely the opposite. Fans want those toasted raviolis now, so they can get back to the action.

"It's not without a challenge," said Sebek of the local providers' performance at CityPark. "But their speed of service is improving with each match."

PART 2:

THE TECHNOLOGY POWERING THE OPERATION

Almost every sports team has some version of a stadium or team app, usually developed by one of the main third-party providers in the market. These vary in quality and functionality, with most teams trying hard to engage fans by supporting digital ticketing and payment and loyalty services inside the app, with varying degrees of success in getting fans to download and use the programs.

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To support its ambitious fan-connection demands – including its concessions operation – St. Louis City SC went its own way, building its own team application from scratch to get all the functionality it wanted. “Most stadium apps leave something to be desired,” said St. Louis City SC chief experience officer Matt Sebek. City SC’s app, on the other hand, was functioning a year before the team ever took the field, bringing content and information to prospective fans well before the first game ball was rolled onto the CityPark turf.

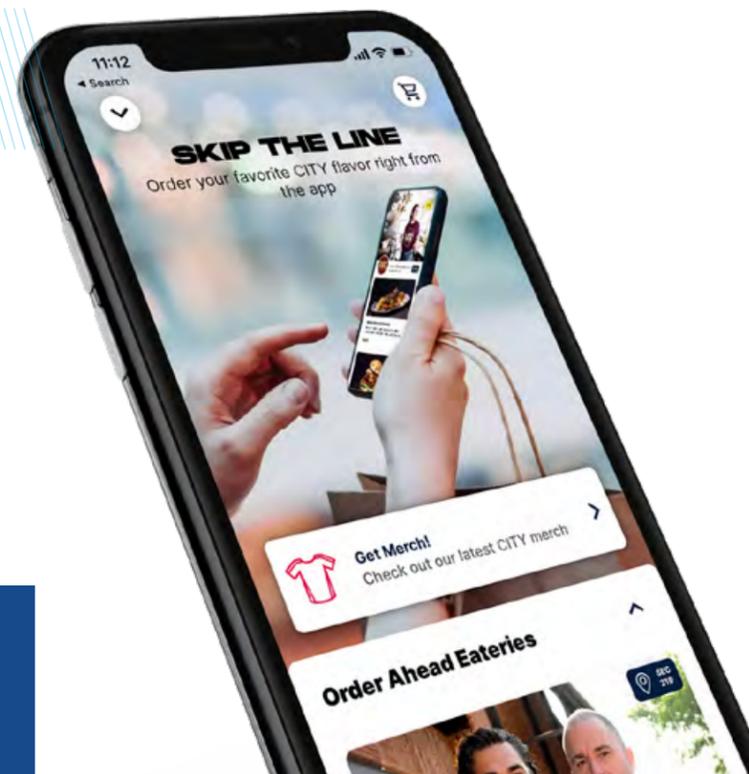
By building connections through the content, Sebek said that City SC now can claim that approximately 74 percent of the fans have the team app installed on game day. And while digital ticketing was a “no-brainer” inclusion, the “City Go” functionality of the app allows fans to store a payment form for easy scan-and-pay operation, as well as to order food ahead of time for express pickup at any one of 10 different stands.

According to Sebek, the order-ahead option was a key to the team’s strategy to “stretch the time” available for fans to get food and drink. By adding an order-ahead option, the idea was that stands could essentially serve approximately twice the number of patrons, with one window for walk-up orders and another for orders made via a mobile device.

“The peak times for fans to get food is 10 minutes before game time, and 10 minutes before halftime,” Sebek said.

“We want to extend those ordering times.”

So far, the concept is trending toward increasing success. Some of that may simply have to do with the fact that the app looks good and works well.



“The photos [of menu items] are professional, they’re beautiful,” said Sebek. The order-ahead part of the app also includes photos of the individual stands’ purveyors, and a small company logo.

“It’s like something you might see from Panera,” Sebek said.

According to Sebek, at stands that support the online ordering, the online orders make up 20 percent of a game day’s overall orders, with a higher overall order size and bigger tips than in-person orders. Many of those are placed before the game starts, as more fans embrace the team’s urging for fans to arrive early and take full advantage of the extensive menu options. According to Sebek, 60 percent of a game’s overall food and beverage sales now take place before the opening whistle is blown.

While the providers we talked to cited fulfilling the app orders as one of their biggest game-day challenges, they also embraced the option, claiming its additions in volume and revenue made it a great business decision. “A small restaurant business might see 10,000 customers in a year – we’re putting them in a place that gets 22,500 people every night,” Sebek said. “It’s an environment that’s a bit imposing at first, but we’ve all been making operational improvements. Because mobile is so successful, more of our partners are looking to adding it.”

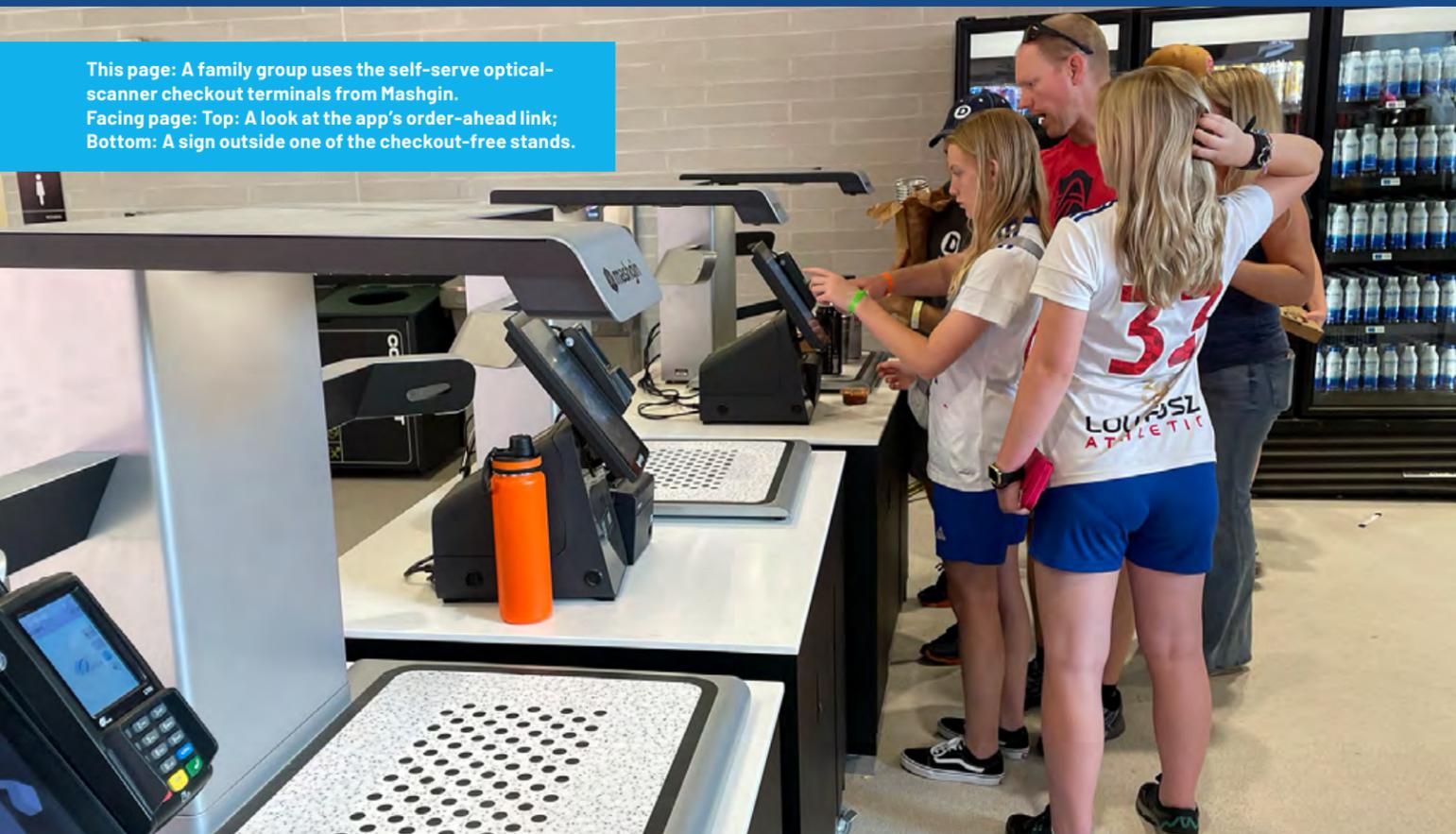
Next in the technology line are the three checkout-free stores, which use technology from Zippin, the leader in the sports stadium marketplace. If you’re not familiar with checkout-free stores, here’s a quick primer. Customers are allowed to enter stores by scanning a credit card or some other pre-authorized payment method. After entering the store’s gate they simply take the items they want off the shelves and then exit. Payment takes place online after they leave the store. All three of the checkout-free stands at CityPark have a hot food option available, as well as drinks and packaged snacks like chips or popcorn. In several live timings, Stadium Tech Report can confirm that even a fan who wanders around a bit to check out the various offerings can usually figure out what they want and leave in less than a minute.

Sebek said the checkout-free stands are getting “incredible numbers” for transaction times, with an average of 90 seconds per transaction through the first 10 matches. Checkout-free orders on average are also 125 percent higher than those at other stands, stats that already have the stadium team in motion to bring the technology to more stands.

“We’re going to find ways to add more [checkout-free stores] for sure,” Sebek said.

A number of other stands that don’t have order-ahead or checkout-free options are still using advanced technology, including the self-checkout terminals from Mashgin, which use cameras to scan items placed

This page: A family group uses the self-serve optical-scanner checkout terminals from Mashgin. Facing page: Top: A look at the app’s order-ahead link; Bottom: A sign outside one of the checkout-free stands.





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on the terminal shelf, allowing fans to complete a transaction without staff assistance. At some belly-up bars CityPark has flip-screen terminals where staff enter purchase information and then flip the screen over for a customer to complete the payment part of the transaction.

Overall, "it's the perfect marriage, emerging tech and great local food," Sebek said.

PART 3:

THE FOOD: HARD TO MATCH ST. LOUIS' MENU

Just scanning the list of food items available at CityPark Stadium is guaranteed to make you hungry. BBQ pulled-pork sandwiches. Smashed hamburgers. Balkan beef wraps, which include onions, tomato, feta cheese, cabbage, and garlic and chili sauce. Chicken, pork or potato tacos. An Italian sandwich with ham, roast beef, salami, provolone, lettuce, tomato, pickle, onion "and a whole pepperoncini." Mac and cheese with jalapeno cheddar crumbles, smoked Missouri bacon jam, and candied jalapeno drizzle. Fully loaded St. Louis or Chicago style hot dogs. And we're not even close to being halfway through the menu!

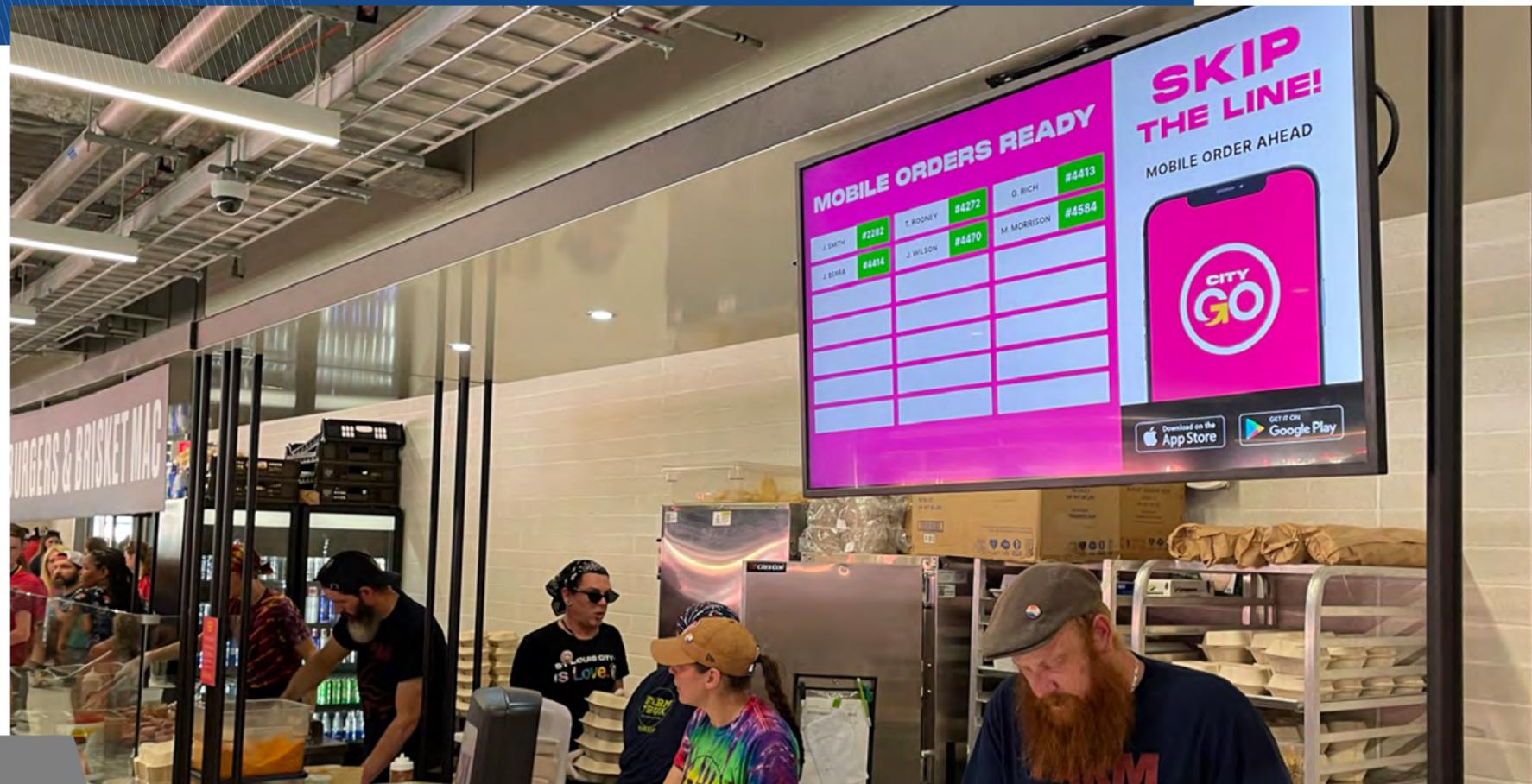
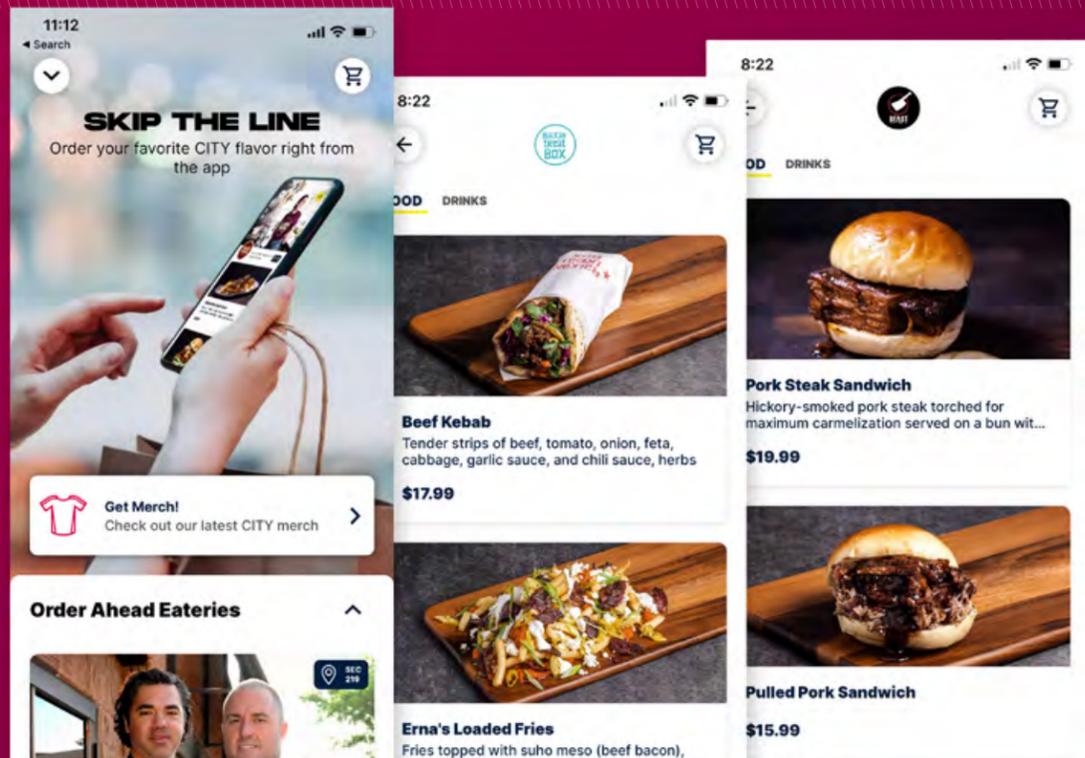
At many stadiums across the country, there are usually at least one if not a few specialty or locally produced offerings. But by and large almost every stadium we know of relies mainly on big concessionaire companies to supply the balance of the game-day menu, with a heavy emphasis on the so-called "fan favorites" of hot dogs, nachos, pretzels and peanuts. Many of these items are generic-type offerings, without much pizzazz. Some even tend to the bottom line of the desirable curve, like the pre-popped popcorn that you can see being brought into the stadium well ahead of game time in huge bags.

And then you have CityPark, and its all-local food lineup. According to the team there are 25 different providers staffing the 52 food or beverage outlets (a number that includes suite and club services), and they all come from in and around St. Louis, and all have some kind of special taste that most likely you've never encountered inside a stadium before. Especially not all at once.

On the night Stadium Tech Report visited CityPark, we were able to briefly speak with "Chief Flavor Officer" Gerard Craft, who owns and operates a range of restaurants in St. Louis and has a resume that includes awards like Food & Wine Best New Chef, Food & Wine Innovator of the Year, and 2015 James Beard



Top: Gerard Craft, City SC's "chief flavor officer." Bottom: Inside the Wally's checkout-free stand.



Left: Some of the individual menu pages from the order-ahead app; Right: The Farmtruk stand's order-ahead screen at halftime, showing six orders ready for pickup.

Foundation Award-winning Best Chef: Midwest, among other accolades. But what's his favorite thing to do these days?

“Being at the stadium is awesome,” Craft said, taking a brief break from supervising some of the stands. “This is more fun than running my restaurants.”

Craft, who said he contacted the ownership team about participating when he heard of CityPark's plans, brought to the party local connections and a level of food savvy unusual for a stadium. Team execs said Craft's presence also made it easier to recruit and sign up local food providers, who could speak with someone who knew their business language, as opposed to a stadium executive.

“Having a chef [leading things] provides a higher level of trust for restaurant people,” said Matt Sebek, chief experience officer for St. Louis City SC.

What Craft said he likes about his stadium post is the fact that the team isn't in it solely for the profits, but is more about building an operation that truly improves the fan experience.

“The team's owners were behind us [the restaurant providers] with every crazy idea we had,” Craft said. “Every [restaurant] owner who is in here is so dedicated – we all want to make this a legacy for St. Louis.”

So that's why a stroll around the concourse at CityPark is a food voyage unlike that at any other venue. Where else can you find all of the above offerings, plus local ice cream, local craft brews, crab rangoon, empanadas, Filipino pork belly, bao sliders, pizza slices, fried samosas and vegetarian tofu wraps? All served by the owners who created the offerings? The answer for now, is nowhere else.

PART 4:

PROVIDER CLOSE-UP: FARMTRUK

One of the providers at the stadium is a business called Farmtruk, which bills itself as “farm to table comfort food,” with an emphasis on fresh, local, free-range ingredients. Samantha “Sam” Mitchell, the owner, has been running a food truck for seven years, “bouncing all around town” in St. Louis, hitting about 200 events a year. One of those events in 2019 was an away-game watch party for the St. Louis Blues outside their stadium, during their run to the Stanley Cup championship.

“The Blues invited food trucks to their watch parties and we just crushed it,” said Mitchell. That led to the Blues offering a concession stand inside their stadium to Farmtruk, which the company has operated the past four hockey seasons.

When CityPark started looking around for providers for its stadium food offerings, Mitchell said CityPark

scouted Farmtruk during hockey season and offered them a spot. With the hockey-stand background Mitchell and Farmtruk are perhaps the most-experienced provider at CityPark, since she knows the difference between a truck event and a game very well.

“It's all about adapting the business, with multiple registers and different line setups,” Mitchell said. Farmtruk, which actually operates two stands inside CityPark (one is smaller and focuses on mac and cheese), is one of the 10 providers who are part of the order-ahead service on the stadium app, a double-edged sword that Mitchell had to learn to deal with.

Though Mitchell said that dealing with the Covid pandemic did help Farmtruk in one perspective (“we had a lot of practice setting up a mobile ordering system for the truck”), she added that there is nothing in the food truck world that can compare to the flood of orders coming in pregame and just before halftime.

“The orders come in fast and you have to turn the food around quickly,” Mitchell said. Even with parameters put in place for the stadium (“a limited menu is the key”)



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Samantha "Sam" Mitchell, owner of Farmtruk

there is still a juggling act that Mitchell is learning to perfect, balancing the app orders with those coming from fans just walking up to the stands.

"As soon as the gates open, I've got 40 burgers going all at once," said Mitchell, whose stand has one register area for walk-up customers and another for those who have pre-ordered through the app. And the latter, she said, continues to grow each game as more fans learn and adopt the service.

"The first game we were on the app, it was like, 'OK, where are you guys,' Mitchell said. "The next game, mobile doubled my sales."

While Mitchell admits that the twin crushes before gametime and before halftime "sometimes cause us to break the Internet," she welcomes the addition of the

app-based orders. "It's really impressive, the amount of volume we get through the app," she said.

Once a sous chef for about seven years, Mitchell said she started the food truck "to take a break" but now is happy about being back in the middle of something frantic that is also profitable.

"When we were setting up the idea [for CityPark] we went to Nashville and watched a game there to get a feel for it, and it brought chills because the fans were so intense," Mitchell said. Now, that energy is evident at CityPark, where getting good food is clearly part of the game-day experience.

"It's a blast because people are so excited to be here, as they swoop by and get their food on the way to their seats," Mitchell said. "It feels like we're setting the bar for something."

And for Farmtruk, it's more than just fun.

"Financially, the stadium stands are bread and butter," said Mitchell, who estimates the stand operations will add an additional 25 percent of revenue to the Foodtruck bottom line.

"It's going to be a good year for Farmtruk," Mitchell said.

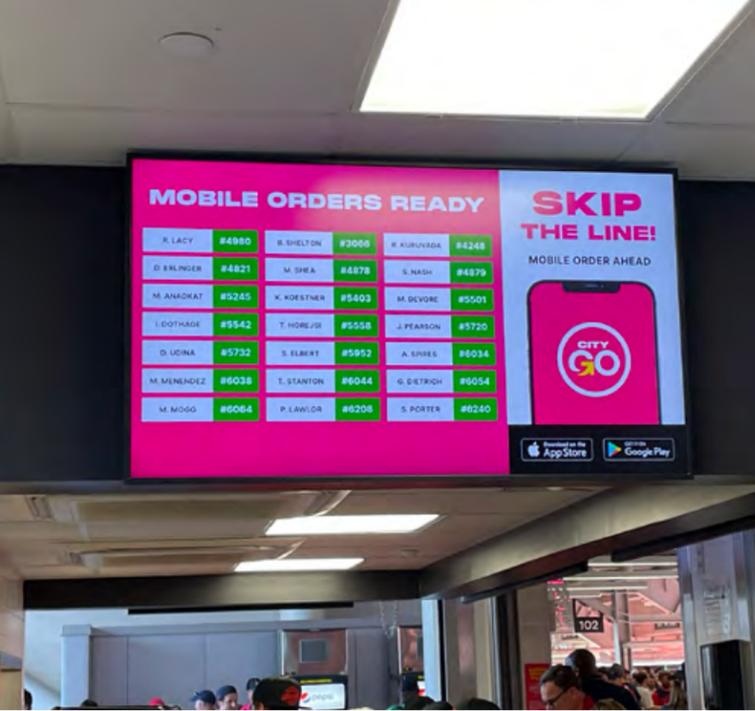
PART 5:

PROVIDER CLOSE-UP: BALKAN TREAT BOX

If there is an only-in-St. Louis restaurant success story, it's the one about Balkan Treat Box, an operation that started as a food truck and now includes the truck, a restaurant, and one of the most popular concession stands at CityPark.

Co-owner Loryn Nalic, who founded the company with her husband Edo, fell in love with the food Edo's Bosnian family cooked. A trained chef, she spent several months traveling around her husband's family's region in that country "cooking as much of their food I could cook."

Upon her return in 2016, she and Edo started up the truck and "hit the streets," with the complicated task of explaining what kind of food they were offering.



But Balkan Treat Box had a couple things in its favor: The food was delicious, and the fact that St. Louis has a large Bosnian emigrant population meant that there was a starter audience who helped spread the word. Soon after, local and national food publications took notice, and Balkan Treat Box became, Nalic said, “a national phenomenon,” with positive mentions in publications including Food + Wine, Zagat, Eater, and many local publications.

When CityPark did a local poll asking which restaurants people wanted in the stadium, Balkan Treat Box was one of the two top vote-getters, according to St. Louis City SC’s chief experience officer Matt Sebek.

While Nalic is excited to be part of the stadium’s food operations, she said it also has presented her crew with a new slate of challenges. First is having to cook on electric grills, a change since even in the truck Balkan Treat Box uses wood fire. Second is dealing with the team’s order-ahead app, which Nalic said creates a much different interaction between restaurant and customer.

“It was difficult to tell people what Balkan food was,” said Nalic, whose food looks delicious but has names that are somewhat incomprehensible, like titles of Ikea furniture. *Cevapi*, for instance, is the name of an offering which includes “grilled Beef Sausages in Somun, Kajmak, onion, side of cabbage salad.”

“Online [ordering] is tough because you can’t control the pace,” Nalic said. “If you’re in the truck you are face to face, you can control the line in front of you, and you can see when things are off and you can talk to people. For online, you need to be ready to serve right away.”

One way to cope, Nalic said, was to reduce the number of items available at the stadium stand. Right now, Balkan Treat Box only offers one main item (at the recent game it was a beef or vegan kebab wrap) plus an option for “loaded” fries, which are french fries topped with beef bacon, sauces, feta cheese and green onions. “You have to be smart about it, you don’t want to fall on your face,” Nalic said.

At the game we attended, the Balkan Treat Box stand had a full walk-up line immediately after fans were let in the stadium, and the order-ahead pickup screen was full of orders ready to be picked up.

“The volume is unlike anything we’ve ever done in a food truck,” Nalic said.

While Nalic said the stand “has meetings every week” with the stadium team on how to improve operations, she said customers feel good about having both options.

“It’s a cool app, and customers like the new way to order,” Nalic said. “We’re all learning together on the best ways to go.”

For staffing, Nalic’s standalone restaurant in St. Louis is only open for lunch, allowing her to use restaurant staff for games, which are mostly at night.

“All the owners [of the individual stands] all want to be there [at the stadium], and we’re all there, every game,” Nalic said. “People are excited to see you, and that’s contagious.”

And like Farmtruk, Nalic said the returns are also favorable.

“The volume is good, the pay is good — it’s a successful venture,” Nalic said.

PART 6:

PROVIDER CLOSE-UP: ANTHONINO’S TAVERNA

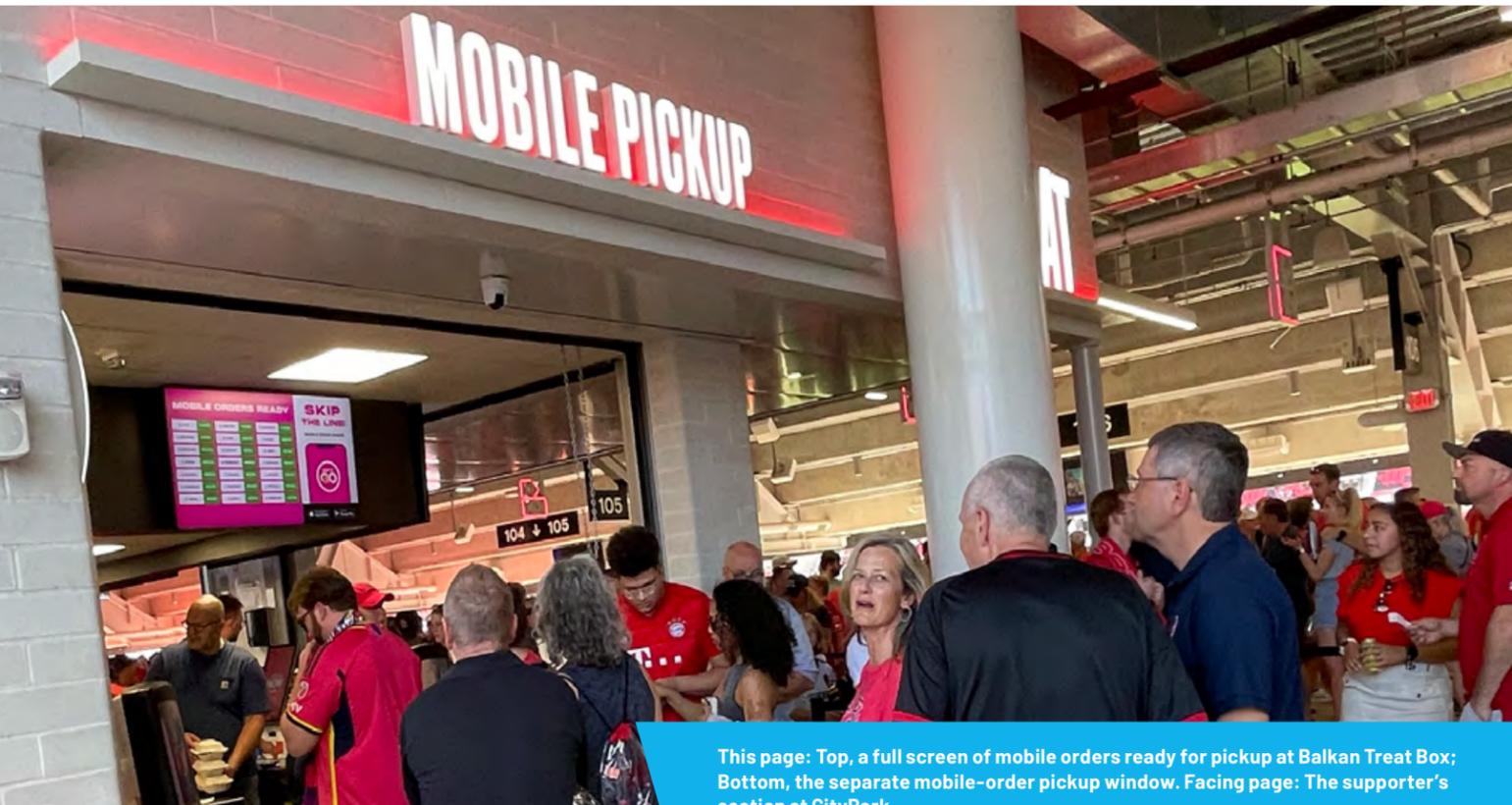
For Anthony Scarato, the restaurant he opened with his brother in 2004 — Anthonino’s Taverna — is something more than just a place for food and drink.

“It’s an extension of our family,” he said. “It’s like coming to dinner at our house.”

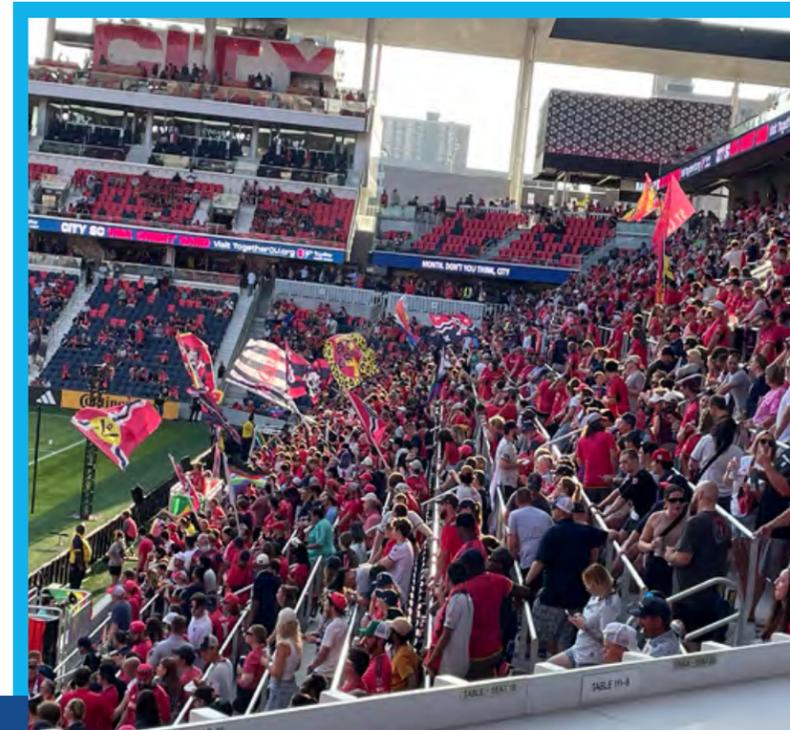
What was once just a small neighborhood place is now a somewhat bigger place, with seating for about 200 guests “if we really pack them in,” Scarato said. Part of what keeps a neighborhood place like Anthonino’s Taverna successful for so long is a commitment to quality, paying attention to small things like the quality of the flour used and choosing more-expensive cheeses for the flavors the owners know they need.

But can all that magic travel outside the walls to a concession stand at a stadium? For Scarato the answer is “yes,” mainly because of the owners’ commitment to quality and the stadium’s support in making that happen.

“We look at it [being at CityPark] like a catering event,” Scarato said. “When we do those events, there are certain menu items we won’t take, because they won’t travel well.”



This page: Top, a full screen of mobile orders ready for pickup at Balkan Treat Box; Bottom, the separate mobile-order pickup window. Facing page: The supporter’s section at CityPark.



With a well-trained staff Scarato said his people know how to bring the Anthonino's flavor on the road – if they are allowed to.

“Some other places might not let the restaurant operators run the stand,” Scarato said. At CityPark, not only does the Anthonino’s lead chef preside over every game day, the stadium also provided all the infrastructure.

“The stadium spent a lot to make sure we have the equipment we need,” Scarato said.

And even though the restaurant is already somewhat of a local and even nationally known quantity, Scarato said that more exposure is never a bad thing. In fact, though he said the stadium stand makes money, he sees even more value in the visibility gained by being in front of sellout crowds every home game.

“We wanted more visibility, and we are ‘the ravioli boys,’” Scarato said. “We see new people who come to games from out of town, plus our regulars, who are happy to see us there.”

A recent change in location at the stadium also worked in Anthonino's favor: When the original stand on the second concourse level had to be moved (Scarato said the fire marshal didn't like having a deep fryer on the second level), the team gave Anthonino's Taverna the opportunity to take over one of the Zippin-powered checkout-free stands, where people scan a credit card at the gate, select items, and then leave, with payment taking place later online. The new location is directly behind the most-fervent fan location, the supporters' section.

“It’s great for the guests, and super easy,” Scarato said. “I love the tech.”

Scarato also liked the fact that the new stand had more kitchen space, allowing Anthonino's to offer a chicken sandwich alongside its gyro sandwich and its legendary toasted raviolis.

“We sell a ton of everything, probably the raviolis the most,” said Scarato. “It’s great to bring our namesake items to the supporters’ section.”

Though the supporters’ section stands see perhaps the fans who really want to get back to the action quickly, Scarato said his team can handle the pressure.

“We have the skill set to perform and execute,” Scarato said. “Our team now knows the rhythm. Before the game and at halftime, they’re ready for the pushes.”



As a longtime part of the St. Louis restaurant community, Scarato is happy for the stadium food program's developing success.

“So many stadiums just have watered-down hot dogs and nachos where nobody puts any thought into it. Fans just go there and eat the same old thing. Here, this is the coolest thing ever. It’s the talk of the town, and it’s

really working. It’s successful, and all us operators are happy to show it off.”

PART 7:

HOW DOES IT ALL WORK?

With still more than an hour and 15 minutes until kickoff, the main concourse at CityPark was already getting busy. Matt Sebek, chief experience officer for St. Louis City SC, confirmed the perception with a quick check of his phone.

“It’s 6:15 and there are already 5,000 people in the park,” said Sebek, who was in the process of conducting a short stadium tour. Clearly, the St. Louis fans had taken the team’s idea of arriving early to heart, and were already enthusiastically lining up at the concession

stands, either to order or to pick up orders already placed through the team app.

Getting so many people inside so quickly is part of the stadium’s design. With the pitch dug down to about 40 feet below street level, the team was able to build a tunnel to provide access for broadcast and back-of-house supply vehicles without having to close off any side of the stadium.

“All four walls are open to fans, we have no ‘back door’ by design,” Sebek said. “You can see, the flow through is pretty good.”

Helping the quick entry was CityPark’s decision to use the Evolv weapons detection system, which allows groups of fans to walk through the security screening technology without having to take anything out of pockets or bags.

As we slowly walked around the perimeter of the main concourse we could watch in real time fans pick and



Left: A look at the outside of Anthonino's Taverna on "The Hill;" Right: Fans walk through the exit gates at the Pie Guy Pizza checkout-free stand.

choose which stands they wanted to get food from, with lines forming quickly at spots like Balkan Treat Box, Farmtruk and Beast BBQ.

While we were inside early we could still hear music and sounds coming from outside on the stadium's east

side, where a large plaza was hosting a pregame party of sorts. According to Sebek the plaza celebrations with DJs or bands are just another part of the "get here early" program, a promotion that also attracts fans who don't have tickets to get inside the stadium.

Balkan Treat Box and Steve's Hot Dogs, Sebek said, were the two top vote-getters in the fan poll about which food providers they wanted in the stadium. As such, both have unique east-side stands that not only serve the main concourse but also have windows opening to the stadium's outside, so fans on the plaza can order concessions without having to come in. Some fans, Sebek said, just stay outside, watching the game on a big screen or relaxing on the nearby lawn across the street.

As the stadium continued to fill up our guided tour ended, and Stadium Tech Report spent the rest of the pregame time seeing how the concession technology worked with a live crowd. Our first stop was Balkan Treat Box, which by 7 p.m. (a half hour before kickoff) had a full snaking line for walk-up orders and a full screen of order-ahead orders ready for pickup.

One couple who picked up an order-ahead order said the process was fast — their order was ready 10 minutes after they placed it when they got past security. The only drawback, they said, was that the online menu didn't offer a specialty cocktail that the stand was serving, which was available on the in-person menu.

Farmtruk's main stand also had a full line of walk-

up customers when we passed them, watching the staffers behind a glass partition as they smashed fresh meat into sizzling burgers next to a pile of bacon. The rainbow tie-dyed T-shirt-wearing owner, Sam Mitchell, was playing quarterback at the middle of the booth,

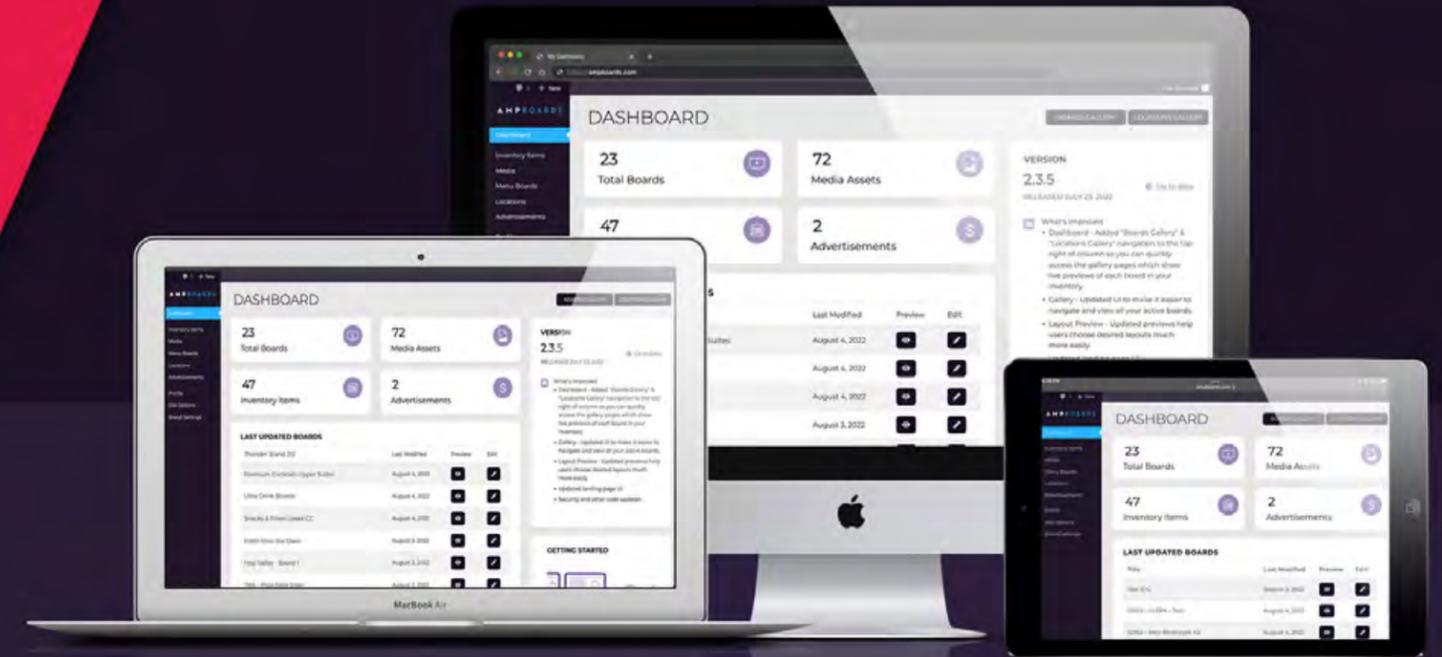


A small line outside the Pie Guy Pizza checkout-free stand.

finishing burgers with condiments while also fulfilling the order-ahead line, which like Balkan Treat Box had a full screen of order numbers.

For Beast BBQ, a similar situation was in place at the main stand, where a walk-up line filled the zig-zag queue while a separate order-ahead pickup area had a full screen of order numbers. Another nearby Beast stand that offered loaded nachos did not have order-ahead capability, but instead had a large walk-up line stretching into the concourse.

On the checkout-free side, our first visit was to a stand run by Wally's, perhaps the most intriguing of the food providers since it isn't really a restaurant but instead a business with two 24-hour highway service stations,



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the closest one southwest of St. Louis off Interstate 44. According to Craft, the Wally's stops are somewhat of a local phenomenon, with huge numbers of filling pumps and a high-end food service with specialty sandwiches, gourmet coffee and signature beef jerky.

At the CityPark stand, two employees wearing Wally's-branded shirts and caps were the perfect carnival barkers, espousing the stand's technology and its ability to get fans food "within 27 seconds!" Inside, the hot food window offered pulled pork and pulled chicken sandwiches, along with Wally's popcorn and Wally's jerky.

We timed one customer's journey through the Wally's stand as he leisurely looked at the hot food offerings, selecting a sandwich, then getting a box of popcorn and a beer. When he strolled out through the exit gates, the total elapsed time inside the stand was 48.92 seconds.

Two other customers at Wally's showed that while the checkout-free stands have been in place since the

season's opening, their method of operation are still new to many fans. One woman was holding her items but had to be coaxed by the employees to keep walking, through the exit gates. "It just doesn't feel right," she said, laughing. Another fan told us after she got out that the checkout-free experience was "fun, but kind of crazy."

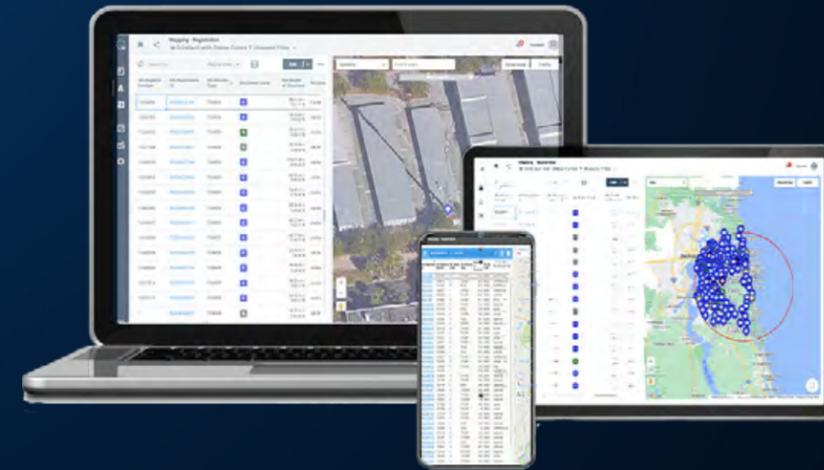
On the other side of the stadium, we watched fans at the Pie Guy Pizza stand deal with lines, a phenomenon we'd seen at checkout-free stands in other stadiums. Because of the way the overhead cameras work to process purchase information, checkout-free stands typically have a limit to how many customers can be in a store at a certain time. So sometimes the stands – which are advertised as being able to eliminate lines – get lines anyway because of their popularity.

At the Pie Guy stand, there was a short line outside the entry gates, and then another short line inside the stand by the hot-food window, where fans were waiting

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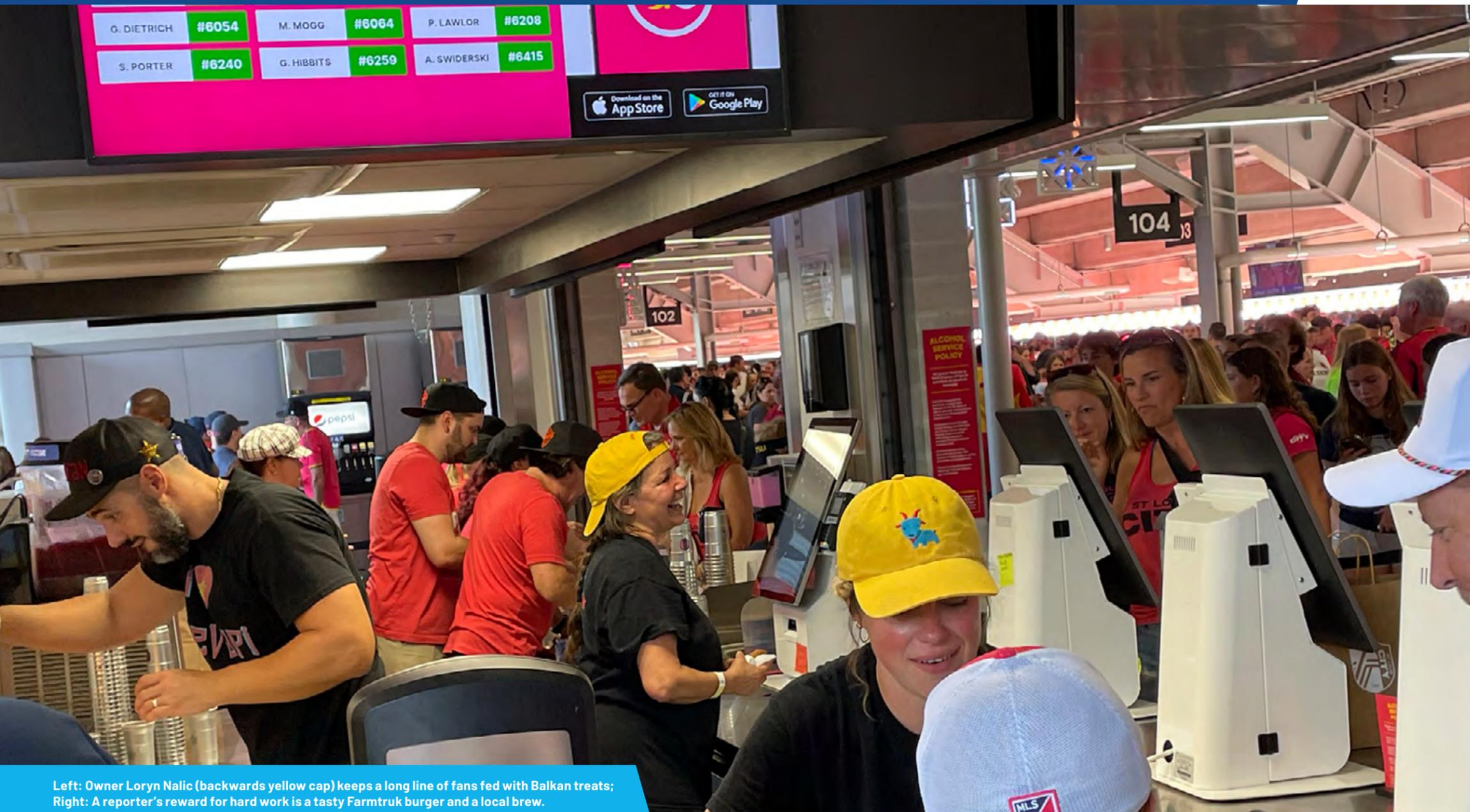
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The menu at the Wally's checkout-free concession stand.

WALLY'S FAVORITES		SNACKS	
Wally's Pulled Pork	10.99	Wally's Jerky	12.99
Wally's Pulled Chicken	10.99	Cookie	4.49
Seasonal Salad	10.99	Wally's Sherbet	6.99
Cheesecake Cups	9.99	Fruit Cup	5.49
Wally Dog	7.49	Billy Goat Chips	5.49
Wally's Specialty Popcorn	9.99	Assorted Candy	4.49
Wally's Picnic Ham & Turkey Sandwich	8.49		



Left: Owner Loryn Naic (backwards yellow cap) keeps a long line of fans fed with Balkan treats; Right: A reporter's reward for hard work is a tasty Farmtruk burger and a local brew.



finished up our order with a smile, saying she was ready for the halftime crush to arrive.

We took the food to a nearby stand-up bar, which overlooked the south end stands, allowing us to watch a corner kick while we enjoyed the fresh, juicy burger and the crisp, cold brew.

While the halftime crowds didn't seem as thick as the pregame one (according to St. Louis City SC 35 percent of all concession orders take place at halftime), we still needed to stand to the side on the concourse to make way for people trying to get more food and drink before play started again. In another only-in-St. Louis food moment we watched while a stadium halftime "fan camera" segment ended up at one point showing a fan in a City SC jersey, who also had a "toasted ravioli" mask surrounding his head.

Our overall impression was that CityPark's concession operation was a growing success, one that will only get better as providers and fans learn the process of how to marry great food with technology that allows it to be dispersed more quickly.

"What we're seeing is that through 10 games, our plan is already validated," said Sebek. "If we just had belly-up stands this wouldn't work. We've found a way to flatten the ordering curves."



for slices to be ready. But once the fans got their slices and other items they were able to quickly walk out. One fan said the entire process was fast overall. "The slowest thing was the time it took to scan my credit card," he said.

On the other side of a long belly-up bar was the Anthonino's checkout-free stand, where the hot food window offered the toasted raviolis along with gyro and chicken sandwiches, and even chicken strips with fries. We timed a customer at the Anthonino's stand and watched while he took his time surveying the hot options and then the drink coolers, ending up only

getting a couple beers. Total time elapsed: 43 seconds.

Like any new technology, some of the deployments used for concessions at CityPark may take some more time for fans to be truly comfortable with their operation. At one stand we saw a couple consecutive families struggle with the Mashgin terminals, eventually needing a staff member to help them process their transactions. At some deployments of the Mashgin terminals we have seen at other stadiums, a close-by instruction chart tells customers to make sure the items are spaced out so that the cameras can pick up the individual items.

"They can be tricky for first-time users but once they use it once they usually get it," said one staffer whose stand had a couple Mashgin terminals.

With the game finally underway at 7:30 the concessions crush subsided, and Stadium Tech Report went around to the Farmtruk stand to get a firsthand taste of the food before the halftime crowds arrived.

At the walkup line we ordered a burger and a local craft beer, a CityWide Pils from 4Hands Brewing. We used the stadium app's ability to load a payment card and were able to complete our transaction by simply scanning the QR code into the terminal. Mitchell herself

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