



2018 Non-NFL Events Marketing & Business Plan

Thursday, March 8th, 2018

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Executive Summary

Levi's® Stadium's non-NFL events business continues to generate profit for the Stadium Authority and the City's General Fund while successfully bringing new shows and events to Santa Clara. Levi's® Stadium has grown a distinct reputation as a premier entertainment venue, resulting from the combination of consistently high client satisfaction ratings, a steady pipeline of high-impact events, and incorporating data-driven decision-making into contracting, planning, and executing events.

As Stadium Manager, the Forty Niners Stadium Management Company continues to adapt its business strategy to the changing sports and entertainment landscape, and will focus our efforts in 2018 on guests, partners, and building the Levi's® Stadium brand as an entertainment venue. It is becoming ever more important to understand the behavior of guests and attendees, how they engage with the Levi's® Stadium brand, and their unique customer journey. To achieve these objectives the strategy and approach must evolve to enhance guest communication and engagement by adapting our traditional communication vehicles and content strategies, tailored to different demographics. Specifically, the Stadium Manager plans to engage new and returning clients and guests by:

- Defining the brand with a new logo and revamped marketing assets, including physical and digital collateral
- Hosting in-market private events to returning and prospective clients to showcase the venue's capabilities and event opportunities
- Leveraging historical event data to market Levi's® Stadium's comparative advantages to the most relevant industries and organizations
- Targeting specific client and business groups through social and digital marketing, leveraging Levi's® Stadium's social media channels and web properties
- Co-branding / sponsoring local conferences and industry-relevant events while growing new and existing partnerships

Through this deeper connection between Levi's® Stadium events and its guests, the Stadium Manager will achieve the optimal outcome for the business, Stadium Authority profit and community engagement.

2017 In-Review

Annual Summary:

Levi's® Stadium's non-NFL events business has continued to thrive in the local market as the venue completes year 4 of its operational lifetime. The non-NFL events business is built on two different categories of events, **Major Events**, which are stadium-wide ticketed events open to the public, and **Special Events**, which are private, contracted and generally non-ticketed exclusive events. With a growing reputation as a national highlight and coveted destination for premier events, to-date in FY 2017 alone Levi's® Stadium has hosted 11 Major events and over 100 Special Events, resulting in over **450,000 total attendees** and generating over **\$48M in gross revenue**. For context, we have hosted a wide variety of Major Events and 120 – 150 Special Events in past years, indicating that we have been able to increase the number of high-impact, public-facing events while continuing to be more efficient with how we book and execute Special Events.

While the majority of this revenue came from Major Events, Special Events performed very well in generating revenue. Understandably, the former concessionaire described this business as a “mid-size convention center which hosts both NFL and non-NFL events.” While this year is not over for the Stadium's event calendar, with 1 Major Event and 10 Special Events remaining, the holistic business model has enabled the Stadium Authority to maintain profitability while delivering great experiences to clients, fans, and community.

**12 Major
Stadium
Events**

**100+
Special
Events**

**450K+
Total
Attendees**

**\$48M+
Gross
Revenue***

*Based on actual gross revenue to-date plus projected revenue from remaining Major and Special events

Among our Major Events, Levi's® Stadium has hosted a wide range of event types in order to cater to our wide variety of fans and their respective interests, including:

- Soccer – 3 events
- Concerts – 2 events
- Stadium Experience – 2 events
- High School Football – 2 events
- College Football – 2 events
- Extreme Sports – 1 event

Among our Special Events, Levi's® Stadium has successfully attracted a wide range of event and client types, collectively hosting 56 receptions, 17 Holiday Parties, 19 Meetings / Conferences, 10 Private Parties (weddings, formals, proms), 4 tradeshow, and 3 full-stadium private events, also known as stadium buy-out events. Furthermore, we have improved in how we book, plan, and execute events, as evidenced by the Stadium Manager's **98% client satisfaction rating** among events to-date in FY17.





Key Wins / Strengths from 2017:

As the event-centric business at Levi's® Stadium maps out new growth opportunities, including more large-scale private events and new types of stadium-wide ticketed events, it is important to recognize key wins from recent history in order to provide an understanding of our comparative advantages and what to build on in future years. In examining the Stadium Authority's non-NFL event business, there are three key wins / strengths that have helped set Levi's® Stadium apart as an iconic entertainment venue:

1. High client satisfaction ratings across client and event types

Based on feedback from our Special Events clients, the Stadium Manager has earned a **98% client satisfaction rating** across all events in FY17. Furthermore, through our robust client feedback program, our clients have over an **87% satisfaction rating across all 9 key event metrics**, including:

- Overall Event Score
- Event Booking Score
- Event Planning Score
- Event Execution Score
- A/V Functionality Score
- A/V Customer Service Score
- Food & Beverage Quality Score
- Food & Beverage Customer Service Score
- Event Day Staff Score

Specific to Major Events, client satisfaction is evidenced through our renewed agreements to host the Pac-12 Championship and Monster Jam in the coming years with consistently high attendance in past events. Our guests and local media also recognize our ability to execute and deliver high-impact events, illustrated by the social posts and news clip below from previous events. Our consistently high performance has allowed us to not only deepen our relationships with current partners, but also build the venue's profile in order to pursue some of the world's largest and most iconic events.



2. Leveraging existing partnerships to attract more high-impact events

The Stadium Manager's success in booking events for different leagues and promoters is demonstrated with repeat visits from Soccer United Marketing, ICC / Relevant and others that have contributed to Levi's® Stadium hosting 11 soccer matches in the last three years.

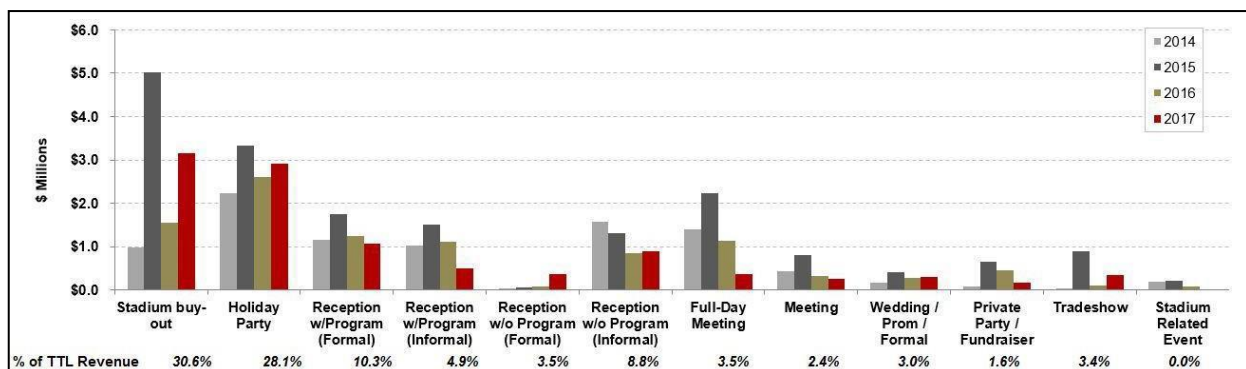
Our ability to both continue executing large-scale events at a top-tier level and growing our business relationships will enable Levi's® Stadium and the City of Santa Clara to be coveted landmarks for the world's premier events. This strength will continue to play a major role in our overall strategic marketing plan as we look to grow and develop these relationships to build a sustainable pipeline and greater industry-wide collaboration.

3. Enhanced analytical tools and capabilities to leverage data and insights from past events to improve financial, tactical, and operational planning and execution

Our Major and Special Events businesses have effectively incorporated new analytical tools and strategies to improve how we monitor the health of the non-NFL business by learning from past event and client data. The direct impact of these efforts has been an improved payment collections process (**moving from an average of 65 days post-event to 15 days**), improved client satisfaction scores across event components, and improved efficiencies between stakeholder groups.

Furthermore, we have been able to adapt and mold many of our tracking tools to serve as internal analyses in order to inform Special Events leadership what events we execute best and present the greatest financial upside for the Stadium Authority.

As an example, below is a dashboard mapping out booked revenue by event type, which helped us refocus our priorities on contracting stadium buy-outs instead of smaller events.



Actionable Opportunities:

While Levi's® Stadium's event profile continues to grow, we recognize opportunities where we can improve as a business, specifically how we leverage our comparative advantages in our event booking and planning allocation process, improve how we attract new clients / guests, and define the venue's brand as an all-in-one event service business.

1. Segment our internal staff in order for our sales and planning teams to capitalize on their comparative advantages among event and client types

With increased tracking and analytics, we have been able to analyze the business on an event-level basis, but our next step will be identifying particular strengths and weaknesses among our staff to best allocate our resources in the sales, planning, and execution processes in order to position our collective team for success.

2. Improve who, how, and when we target new and existing clients

It is imperative to incorporate advanced marketing and analytics tools and popular communication platforms, particularly social media, to understand our guests, where they shop, and how they consume content so we can best tailor stadium event experiences and marketing materials to our guest's interests and behaviors. Specifically, we see opportunities to deploy various types of marketing assets, differing based on content and messaging, on Facebook, Instagram, and LinkedIn and use A/B testing to analyze what assets are most effective. Furthermore, we plan to begin tracking and managing marketing-centric KPIs that we identify with current staff members and the Board in order to effectively measure the results of our marketing campaigns. Finally, we will improve how we strategically segment our audiences / potential clients using particular criteria, including demographics, industry, title / position, associated vendors, and interests.

3. Define the venue's brand as a leader in the event industry

We must focus on how we cultivate the venue's brand with a reputation of consistent success in planning and executing events at all levels for all guests. Concrete branding efforts need to flourish across physical, digital, and social channels and platforms to reach this goal. Specifically, we plan to grow the brand by establishing a digital presence on social media, highlighting the events business to industry leaders, and creating new partnerships and sponsorships that support / amplify our collective vision to become a world-renowned events venue.

Events Business Model and Organizational Structure

Levi's® Stadium Event Definitions and Profiles:

The venue's non-NFL business is comprised of two over-arching event categories, Major Events and Special Events.

Major Events are stadium-wide, ticketed events open to the public. As outlined in our 2017 review, the Stadium has successfully executed a variety of different events that have brought greater fandom and economic impact to the local market. Spanning numerous leagues, sports, and attractions, Major Events have helped establish Levi's® Stadium as an iconic venue, but by no means is the Major Events business the sole driver of the non-NFL events business.

Special Events are private, contracted, and usually non-ticketed and exclusive events, subject to the event's nature and the client's objectives. These events span a wide range, from weddings to corporate anniversaries, charitable fundraisers, and conferences, and make up the vast majority of the venue's event calendar (over 80% of all Stadium events). The Special Events sales pipeline is driven primarily by relationships formed with local companies as well as our reputation and established experience in hosting a variety of events. Therefore, we are not only focused on the immediate health and profitability of our business, but also the connections we create with clients and opportunities to innovate the venue's guest experience.

Levi's® Stadium Special Events

Business Update:

As we advance and develop the business strategy, the Stadium Manager's approach will continue to evolve and improve in how we book, plan, and execute events. In order to continue growing the Special Event business, we have made three key changes to set our venue up for sustainable success:

1. Adding resources

Specific to Special Events sales and planning, we will be adding an additional Sales Representative and a Department Coordinator. While the Sales Representative will focus on selling events, the Department Coordinator will help manage the team's pipeline, contract work, and facilitate the execution of several marketing efforts. This addition will allow us to increase the pipeline's volume capacity along with our abilities to source / book more events while growing the brand as an event venue. Additionally, the Department Coordinator and additional Sales Representative will be able to help support more of the marketing efforts planned for 2018, including creating additional sales collateral, supporting conference partnership / involvement, etc.

2. Leveraging existing analytical tools and resources

In order to streamline our events processes and capitalize on our strengths, we have refined our analytical toolkits to help prioritize high-impact events and opportunities and built additional capabilities to help shape our sales strategy throughout 2018.

3. New Concessionaire & Partner

Stadium Concessionaire responsibilities will transfer to Levy Restaurants, which we anticipate will elevate the comprehensive Levi's® Stadium experience for guests and clients alike across every event. Furthermore, Levy will be able to leverage their core customers in the Bay Area and help augment our marketing efforts for Special Events and serve as partners in helping to grow the venue's events brand. Additionally, Levy will improve food and beverage operation and quality for events with an eye for improving staffing efficiencies.

Given our recent additions and changes, our Special Events team is poised to expand the business more than ever, guided by our three key initiatives for the coming year.

2018 Initiatives:

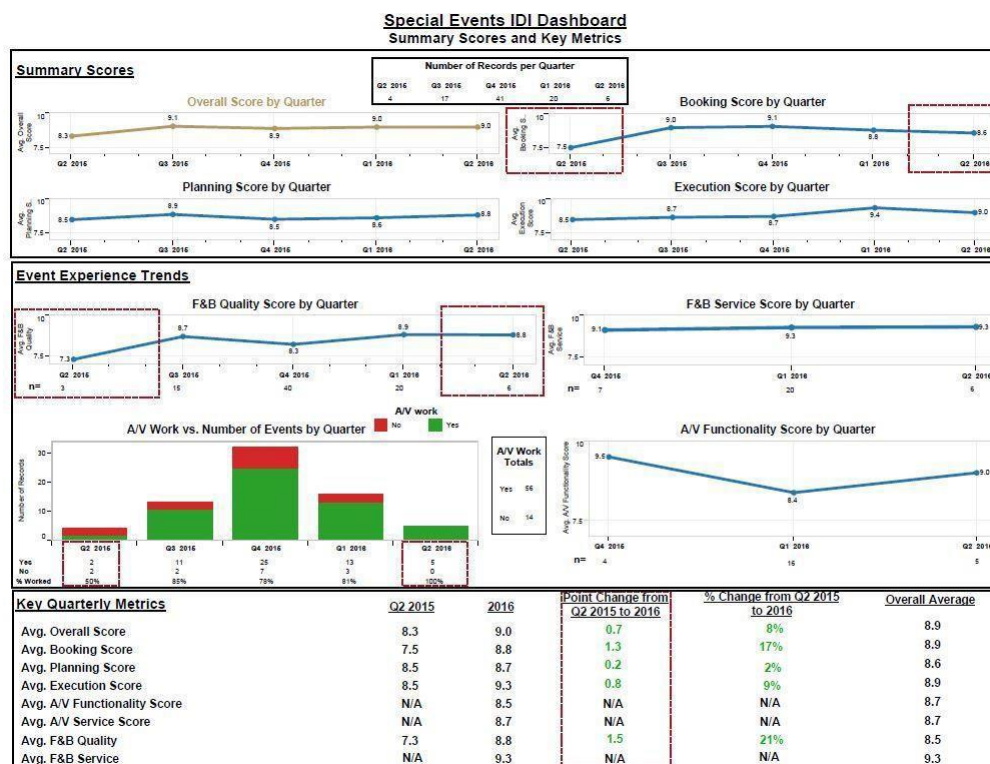
Within Special Events we believe there is more potential for growth, which will be realized through relentless innovation and a driving pursuit to enhance the client / guest experience. While we see the potential in the market, we also recognize the challenges that come with a stadium's fifth year in operation. Inevitably, the Stadium is no longer the newest event venue within the region and cannot assume the same level of inbound business, heightening the demand for prospecting and lead generation. To address such challenges while pursuing our greater vision to become the premier event venue, our team is focusing on three key initiatives in the coming fiscal year:

1. Amplify the venue's brand in the marketplace

While the general brand of Levi's® Stadium has grown alongside its portfolio of major events hosted, we need to lay the groundwork for the venue's future business by cultivating our brand as an all-in-one event service provider. Therefore, a key area of focus for the Special Events business heading into FY18 will not only be how we define our brand, but also how we market and amplify that brand within the events world to become a true industry leader. Specific priorities and associated activities are outlined below within our go-to-market strategy.

2. Leverage historical event data and established marketing channels to understand and strategically target new clients and opportunities

In the last 18 months we have made great strides across the non-NFL events business by incorporating historical data, competitive analysis, and client feedback into how we evaluate and improve our non-NFL events' business model. Specific to client feedback, we developed the In-Depth Interview (IDI) program where we interview clients after events to review their holistic event experience and capture qualitative and quantitative feedback. After the first year of implementing the IDI program we effectively increased client satisfaction across event elements, as illustrated in the dashboard below:



While the internally-focused improvements have helped us refine our product as an event services provider, the competitive landscape across the Bay Area dictates that we improve how we strategically build our pipeline and appropriately target the ideal customer demographic. Using historical data and the reach of the stadium's existing audiences will be paramount in expanding the event pipeline.

3. Engage local civic and industry-relevant partners to grow strategic relationships and recurring business

While we have successfully created relationships with key promotional partners and athletic organizations and associations in service of contracting Major Events, we have not fully realized our potential to grow the Special Events business alongside key civic partners, including the Santa Clara and San Jose Convention Centers. Furthermore, we have a new opportunity to work with the new concessionaire, Levy, in developing a true partnership by leveraging their network and client portfolio to bring new clients and recurring events to Levi's® Stadium.

While the three key initiatives will serve as the focus lens through which we pursue our business objectives and milestones, the success of our initiatives and overall business-plan become actionable and measurable through our go-to-market strategy.

Go-to-Market Strategy:

The Special Events go-to-market strategy will effectively actualize the 2018 key initiatives by laying out various means and opportunities to pursue these initiatives, with measurable goals and milestones along the way to continually evaluate our methodology and course of action. Therefore, we have organized the go-to-market strategy as a comprehensive set of proposed solutions and measures aligned to achieve the key initiatives, beginning with efforts to amplify the Levi's® Stadium brand.

Amplify the venue's brand in the marketplace

In order for the venue and its Special Events business to build a strong presence in the market, it is important to think about building the brand from all aspects, beginning with a tangible, recognizable identity.

Launching a Logo: As a first step in our brand-building objective, we have created a new logo and developed various leave-behind items to help build the logo's exposure:

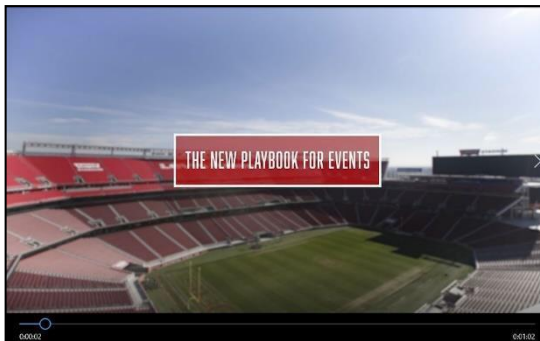


The logo's application to smaller items and physical takeaways is only a first step as a new, elegant logo will help redefine the look and feel of our marketing materials along with our physical and digital assets (see example below). We have undoubtedly enjoyed the tangential benefits of our Special Event's connection to the greater Levi's® Stadium brand, but in order to establish our venue as a long-standing brand realize our event business' full potential we need to heighten our focus on our guests and clients so they know the Stadium to be a consistent first-class experience for private events.

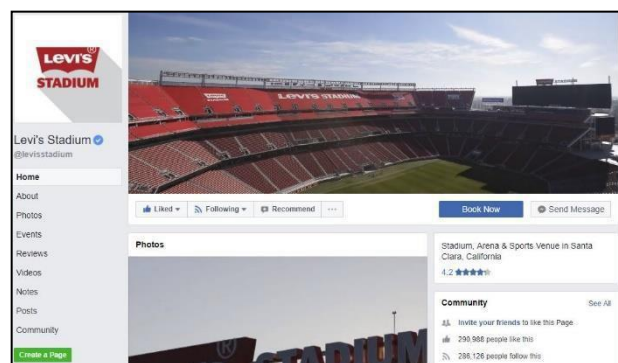
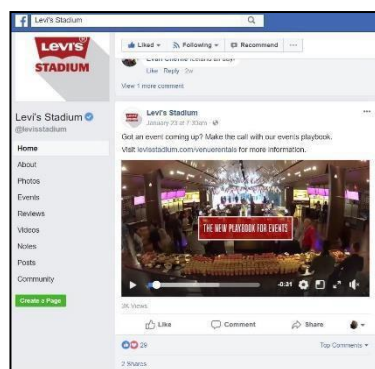


Creating Engaging Marketing Material: A second go-to-market strategy we have implemented in order to grow the brand is developing new, engaging marketing content to live on our various marketing platforms, including Facebook, Instagram, LinkedIn, and our owned web properties. Specifically, one piece of engaging content will take the form of a new highlight reel compiled from recent events along with clip-style testimonial videos from past clients (images below) who are eager to share their unique stories and event experience. In an advertising world focused on short, engaging content, we are working to tailor our style to the 2018 consumer, by channel and demographic, so that regardless how a prospective client may hear about us, the marketing material they see reflects the vast potential that exists for their own event at Levi's®

Stadium. These efforts will ultimately serve lead generation campaigns executed online while showcased at local in-market events to build a sustain a robust pipeline of clients and opportunities.

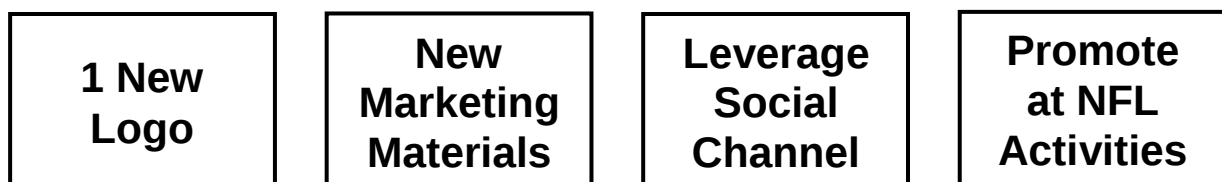


Establishing a strong social media presence: A third strategy to build the venue's brand in the marketplace is creating a strong social media presence and leveraging our existing accounts (Facebook account and past post featured below), along with our social following to engage with our fans and prospective clients. In an era where the average consumer spends over 90 minutes on social media daily, it's no wonder social media continues to grow its user populations and influence as an advertising, sales, and customer service platform. However, we are not interested in social media simply for its popularity, but rather social media presents an opportunity for us to curate the story of our brand and implement an engaging content strategy that goes beyond the eye-catching photographs. In harmony with our new logo and newly developed marketing materials, we are poised to launch a sustainably engaging and creative content plan to catalyze traffic and interest across our social channels in 2018.



Promote Special Events opportunities at NFL activities: A fourth strategy to amplify the venue's brand is continuing to actively promote and advertise Special Events capabilities and opportunities at NFL games and related activities. Given the Stadium Manager's business model, it is critical to continue prioritizing the development, implementation, and execution of marketing materials in support of the Special Events business. Therefore, advertising opportunities to book and plan events at Levi's® Stadium before and during 49ers home games, most notably through highlight videos and associated calls-to-action, will continue to be an important channel in amplifying the venue's brand in the catered events marketplace.

Brand Building Strategy in review:



Leverage historical event data and established marketing channels to understand and strategically target new clients and opportunities

Potentially our greatest opportunity exists in targeted marketing, specifically implementing new tools to leverage historical customer data, along with innovative strategies to understand our target demographic, and how we can tailor our messaging to various guest segments.

Implement CRM to increase returning clients and manage new opportunities: One of the most critical go-to-market strategies for our Special Events team will be a full roll-out of a CRM platform. Successful implementation of CRM will allow us to save time on lead generation, contract management, and client conversion by tracking new opportunities within the tool. Additionally, CRM will also help us maintain strong relationships with existing clients and capitalize on returning and recurring business. While all event venues need to balance new and existing business, structured data flow and client management will help us focus our efforts and resources on the best opportunities available.

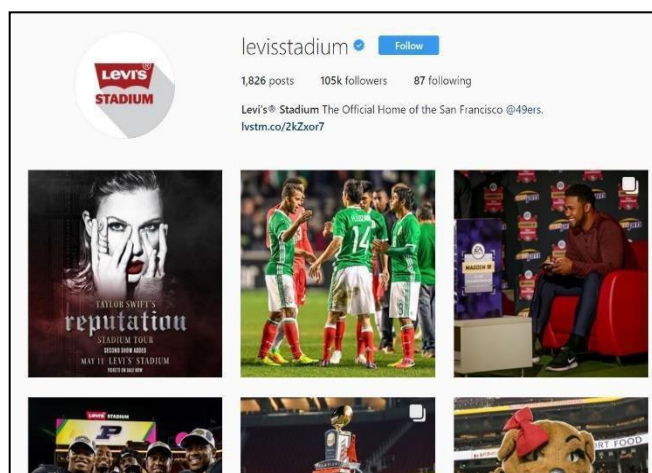
Revamp Sales Kit: In order for our materials and messaging to resonate with prospective clients, we need to be agile and flexible in how we deliver that content depending on the client, the context, and the end goal. To make our materials and overall presentation adaptable, we have unrolled a new sales kit, composed of three distinct sales materials:

1. Digital Brochure – Similar look and feel to our website (levisstadium.com/venue-rentals/about) with pricing and additional details included
2. Sales Snapshot – Quick snapshot featuring pictures of past events and contact information for a quick leave-behind (example featured below)
3. Sales Toolkit – A robust menu of capabilities, event space information, details, and pricing, intended for clients ready to book an event

A fundamentally flexible sales kit will allow our team to always be ready to engage clients at all stages, but with a fresh and tailored look to ensure our message is communicated in a way that resonates with our clients.



Leverage social media tools and strategies to build and market to target audiences: While social media is a great opportunity for us to build the brand, there is potentially a greater business need to leverage social media to understand our client's profiles and interests so we can find similar demographics and profiles around the greater Bay Area. While no two clients are the same, there are often overlapping characteristics, traits, or behaviors common to many clients. Given social media's enormous user population, we have the ability to use our current following and client profiles to create client "lookalikes," or mirroring profiles, on Facebook to strategically target new clients that fit those descriptions and behaviors with tailored messaging and offerings. This go-to-market strategy has already been in development for the last three months, with over \$50K budgeted to social / email ad spend alone to both advertise events and attract prospective clients.



When thinking about key criteria to look for, we have started exploring the following attributes / characteristics in some initial social and email campaigns:

- Relevant locations (i.e. proximity to the Stadium)
- Company Industry (most often tech companies, local businesses, and non-profits)
- Company Size (both by revenue and headcount)
- Key event decision-makers (i.e. Human Resources, Marketing Departments, Executive Assistants, and third-party corporate event planners)

While Facebook's user population presents the most recognized targeted marketing opportunity, we believe based on our clients and their patterns of social engagement, we can use Instagram and LinkedIn to showcase past events with a call-to-action, in addition to Facebook, to engage new prospective clients.

Finally, we plan on taking targeted social marketing a step further by applying client behavior insights to geo-targeted and profile-targeted social posts and email campaigns to cover all primary modes of our client's communication. While this will be a first launch into the next generation of targeted marketing, we will be able to learn fast through A / B test to iterate and determine the best forms of content (i.e. photo vs. video), respective to the channel. Ultimately, social media and our application of data-driven decision-making will be central to engaging with the right audiences with the right products at the right time.

Section in-review:

**Implement
CRM
Solution**

**Revamp
Sales Kit**

**Build
Target
Audience**

Engage local civic and industry-relevant partners to grow strategic relationships and recurring business

Creating relationships is not a new activity or priority for our venue / organization, but in order to succeed in our initiative to be strategic in our partnerships in pursuit of returning and recurring business, we need to focus our go-to-market strategy on how to *engage* our partners at a deeper level.

Co-branding / sponsoring relevant conferences: While we have improved in expanding our network among the local event industry, we need to continue to become an even greater known presence among industry leaders. Going a step beyond attending relevant conferences / summits (some featured below) will be leveraging our new logo and the Levi's® Stadium Special Events brand to help drive exposure while staying current with new opportunities and mutually beneficial partnerships with local businesses / associations.



NATIONAL ASSOCIATION FOR
CATERING AND EVENTS



Showcasing our product to partners and prospective clients: Through our analysis by event along with client feedback, it became clear that the best way for clients and partners to understand the scope of our capabilities and the level of service we provide is to literally show them. We experimented with a few smaller, exclusive events for past clients in this last year, and based on positive feedback and favorable results, we have invested \$50K through the next fiscal year to host more prospecting events, specifically geared towards:

- Previous clients
- New / prospective clients
- Current 49ers corporate partners and suite holders

With marketing funds allocated to more events, we anticipate higher conversion among prospective clients along with increased returning business as we continue building and reaffirming our reputation for consistent greatness across our events.

Collaborating with Levy to generate new business: Levy has expressed interest in growing the Special Events business, both in their execution level as our concessionaire and through promotional efforts across their greater network across the Bay Area. As an established, reputable brand in the stadium / arena event landscape, Levy presents unique value opportunities in helping us connect with traveling events as well as more long-term event partners. Beyond Levy's initial interest in playing an active and highlighting role in our Special Events business, forging a sustainable partnership will help grow our overall non-NFL events pipeline and our own network.

Section in-review:

**Co-brand /
Sponsor
Conferences**

**Host Live
Events**

**Collaborate
with Levy**

Levi's® Stadium Major Events

Business Updates:

The Levi's® Stadium's Major Events business has been a key driver in propelling the venue's reputation and hosting popularity to new heights, most recently evidenced by the Stadium's opportunity to host Super Bowl 50. However, to sustainably grow the business as well as develop a consistent event calendar for years to come, we cannot rest on prior achievements but must look ahead to how we can be innovative in the events we attract as well as the fan experience we provide. With that in mind, our Major Events business underwent three significant changes / updates over the last six months that will serve as initial groundwork to help grow this particular business:

1. Improved proposal process

The Stadium Manager has continually raised the quality of bids presented and have improved the contracted event agreements, to the benefit of the City of Santa Clara and the venue. As we gain experience in bidding on, winning, and executing events, we have optimized the proposal process to ensure we are competitive for attractive high-impact events and most often successful in bringing new or established events to the community of Santa Clara. Furthermore, by continually innovating our proposal process, we have effectively standardized roles and responsibilities within the greater bid process to better prepare ourselves on announcing, marketing, and delivering these events.

2. Cross-departmental involvement in the promotion and execution of an event

Including more departments in how an event gets announced, promoted, and executed has allowed Levi's® Stadium to capitalize on several unique skillsets residing around the organization to optimize how we perform as a business and as a service with respect to our Major Events. For example, we have created more structure to incorporate our Marketing and Design teams into the comprehensive event execution plan, which has not only helped overall exposure and caused attendance to rise but has also paid dividends on increasing demand and viewership for these events.

3. Emergence as a soccer destination

In the last 18 months Levi's® Stadium has developed a reputation as a soccer destination for local, national, and international teams and tournaments. For context, Levi's® Stadium has hosted 11 soccer matches in the last three years, including European soccer clubs in the International Champions Cup, International teams in the Copa America Centenario as well as the CONCACAF Gold Cup, and professional teams from Major League Soccer. Furthermore, our soccer matches have attracted a wide range of fans, in total bringing over 588,000 fans to the stadium. While soccer has been successful so far, the Stadium Manager aims to continue hosting national and international soccer matches while pursuing more high-demand international tournaments and anticipated matches. Most recently, the venue has submitted a complete bid for the FIFA 2026 World Cup and expect to not only be competitive in the soccer world, but also continue emerging as a leader and U.S. soccer destination.

With several important changes made to the Major Events business, in both process and capabilities, we are now equipped to embark on new initiatives designed to take this Major Event portfolio to new heights.

2018 Initiatives:

After four years of attracting, contracting, and successfully executing several high-profile events and shows, we plan to evolve our business towards financial optimization with a focus on innovation for both the fan's experience and the venue's brand.

1. **Leverage financial projections and ticketing data from past events to drive incremental revenue**

As the ticketing landscape and financial models behind sports and entertainment continue to change, we need to think of new ways to capitalize on high-demand products and events by tracking and monitoring the ticket marketplace with predictive analytics.

2. **Strengthen existing partnerships with external teams and leagues to increase our event schedule and host more high-impact events**

Several marquee events in Levi's® Stadium's history were only made possible through the relationships that the Stadium Manager and the City of Santa Clara forged across the greater Bay Area community, which over time have and will continue to bring more high-impact events to Santa Clara. Civic leaders from the City of Santa Clara and beyond have come together to bring events like WrestleMania, Super Bowl 50, the College Football Playoff National Championship and the 2017 Gold Cup Finals to Santa Clara, and we are already working towards bigger events and achievements together, most recently in the 2026 FIFA World Cup bid.

In order to find similar opportunities for large-scale events, we will continue building our relationships with the key promoter groups involved across event types. These promoter groups include ICC / Relevant, Soccer United Marketing, FIFA, AEG, Live Nation, Global Planet, the Pac-12 Conference, Feld Entertainment, and the College Football Circuit. As a priority for 2018 we are working with these promoters to expand our business and event profile, ideally bringing new events and audiences to Levi's® Stadium.

3. **Source new events and relationships**

In conjunction with our existing relationships with teams, leagues, and industries, tremendous potential exists to bring in new events that could not only serve immediate financial and community benefits, but also create financial sustainability as recurring events. By working to break down and understand the event landscape relative to what our guests and community want, we can bring new events with less risk and greater potential to attract new, diverse groups.

Furthermore, we will work to review the curfew policies with the City of Santa Clara and associated partners in order to align on an event calendar that is set up to host new, attractive events for the community. While there are several factors and aspects to the city curfew and associated policies, it will be critical to collaboratively develop a flexible event calendar that is attractive to the events and partners our collective community wants to bring to Santa Clara.

Despite many restrictions and challenges in contracting, executing, and budgeting Major Events, our go-to-market strategy to actualize the three key initiatives above will help further the City of Santa Clara and venue's ability to keep new Major Events coming while working towards financial stability and consistent growth in event count and revenue.

Go-to-Market Strategy:

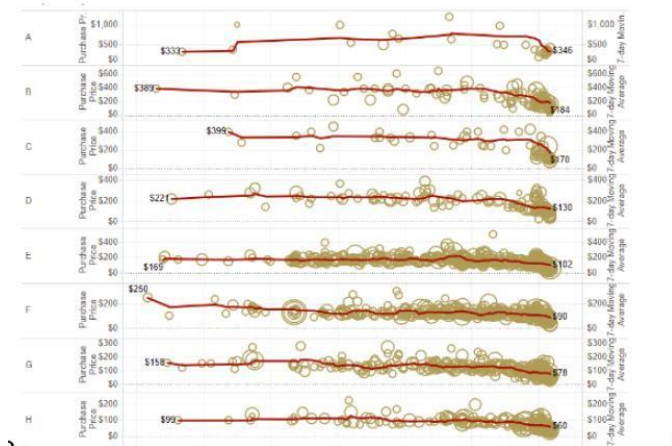
We have organized our go-to-market strategy as a comprehensive set of proposed solutions and measures aligned to achieve our key initiatives, beginning with our efforts to optimize the Stadium Authority's financial performance across non-NFL events.

Leverage financial projections and ticketing data from past events to drive incremental revenue

Data-driven marketing campaigns: Similar to how we aim to apply the principles of A / B testing to determine optimum marketing strategies for Special Events, we need to better understand where fans go to learn about events, where they buy tickets, and what drives those actions in order to best market our events to fans and drive conversion. This concept is realized through a multitude of campaigns across email and

social channels, especially Facebook, measured against KPIs to help monitor success and failure to best use our marketing spend. An iterative feedback loop will be instrumental in helping us continually improve our marketing strategy while learning what plans / campaigns work for different events, various target demographics, or other determining factors.

Dynamic Ticket Pricing: Applying dynamic ticket pricing as a common practice to all non-NFL events will help us better price ticketed events while allowing the Stadium Authority to capture significant incremental revenue using predictive analytics of the secondary market. We have developed tools and dashboards similar to the following examples, which highlight secondary market activity and current sell-through rates for Stadium events.



Ticket prices relative to secondary market



Levi's® Stadium view by percentage seats sold

Group Packages and Experiences: To help drive demand and attendance for events that are not anticipated sell-outs, we have several methods to incentivize group ticket purchases and additional hospitality or premium packages to drive additional revenue. Specifically, Levi's® Stadium events can leverage Loaded Tickets, a virtual payment method that allows fans to spend money by using their ticket at the game, in order to drive group sales and increased event day per cap. Additionally, Levi's® Stadium can leverage other elements of the Stadium Manager's business, especially fan-facing departments (i.e. Fan Engagement and 49ers EDU) to tap into viable group ticket sale targets.

Section in-review:

**Data-drive
Marketing
Campaigns**

**Dynamic
Ticket
Pricing**

**Group
Packages &
Experiences**

Strengthen existing partnerships with external teams and leagues to increase our event schedule and host more high-impact events

Incentivize collaboration in booking and hosting events: Historically Levi's® Stadium has been successful in hosting MLS and international soccer matches, in part due to a mutually beneficial partnership between the Stadium Manager and the San Jose Earthquakes. This partnership continues to be very fruitful, both in events co-hosted along with unexpected opportunities by virtue of collaborating with a leader in a related but distinct event field, most recently in our bid to host the 2026 World Cup. Forging similar partnerships where teams, leagues, and organizations are incentivized to collaborate is a key go-to-market strategy,

specifically with peer organizations / venues, including AT&T Park to help the holistic Bay Area event business grow and present new opportunities otherwise unknown.

Incentivize multi-year agreements: Securing consistent events provides a degree of secured revenue to plan and budget around while providing flexibility to host events with ranging financial incentives. Furthermore, multi-year deals allow our organization to continue improving in our execution of an event, ideally resulting in improved financial performance with reduced costs based on learned efficiencies.

Section in-review:

**Incentivize
collaborative
booking**

**Incentivize
multi-year
deals**

Source new events and relationships

Competitive market research on upcoming / future events: In our continued effort to grow the non-NFL business on behalf of the Stadium Authority, we are constantly researching, analyzing, and planning for new events. One key tool that has allowed us to create early momentum behind this initiative is a multi-departmental research collection of nearby leagues, events, and upcoming event dates. Maintaining an updated event landscape allows us to keep pulse on the local entertainment market's activity, interest, and opportunities in order for us to best allocate our resources and contract events that will be a win for the Stadium Authority and the community.

Bid strategically and creatively: We are well-positioned with an established proposal framework, bid team, and drafting / execution process to bid on most stadium-relevant events that we believe will benefit the Stadium Authority and appeal to our community, increasing our opportunities to further develop our Major Events pipeline. While no proposals are the same, having the processes solidified with a framework to begin with and be executed by a trained department will help keep Levi's® Stadium nimble in its non-NFL events business efforts and better adapt to new and / or immediate event opportunities. A new focus for the coming year will be reviewing and analyzing more opportunities to host different events, such as the Stadium Links event, that creatively leverage the Stadium and accommodating infrastructure. Expanding our event profile will not only help build out our event calendar, but also attract new audiences and guests to the venue.

Advertise and promote Major Events and NFL games and related activities: To help increase popularity, viewership, and demand for Major Events, the Stadium Manager will continue promoting Major Events at 49ers home games and related NFL activities. While this has been an effective strategy for some past Major Events, such as Monster Jam and previous Coldplay concerts, the Stadium Manager will look to increase and prioritize promoting Major Events at NFL events, with the expectation of increasing a Major Event's demand while bringing new, diverse audiences to our non-NFL events. Furthermore, the Stadium Manager will increase efforts to capitalize on NFL activities as opportunities to promote upcoming Major Events. The most recent example of this concept was during Fan Appreciation Day, before and during the final home game, where the 49ers used Gameday Entertainment activations to build awareness and demand for Monster Jam and the Taylor Swift concert, which was a successful effort we plan to build on next year.

Section in-review:

**Competitive
market
research**

**Bid
strategically &
creatively**

**Promote at
NFL games &
activities**

Conclusion

While 2017 proved to be another successful year for Levi's® Stadium's non-NFL events business, we intend to use this business plan and our collective efforts to raise the bar in terms of the level and profile of events we host and the level of service and satisfaction we provide to our guests and clients. While we continue to build out our capabilities, we are also eager to continue working with the Stadium Authority and furthering our partnership to help continue growing our collective economic impact and leveraging the stadium as a driver for community engagement.

We are confident that we have outlined a business plan and overall strategic approach that sets all parties up for success, but there are some additional risks and considerations we will need to address and work on with the SCSA Staff to ensure the Stadium Authority's success for years to come. Specific to costs, it will be important to continue working together with respect to changes / updates that may impact the venue. From a brand perspective, it will be important for all parties to collectively manage the venue's reputation, calendar availability, and event broadcasting as these three factors are significant in our efforts to bring high-impact events to the Stadium while attracting a wide variety of guests.

We look forward to embarking on the next chapter of our business plan while serving as a trusted business partner to the Santa Clara Stadium Authority.