

team marketing research

MLB fans can expect only minor ticket price increases at the ballpark

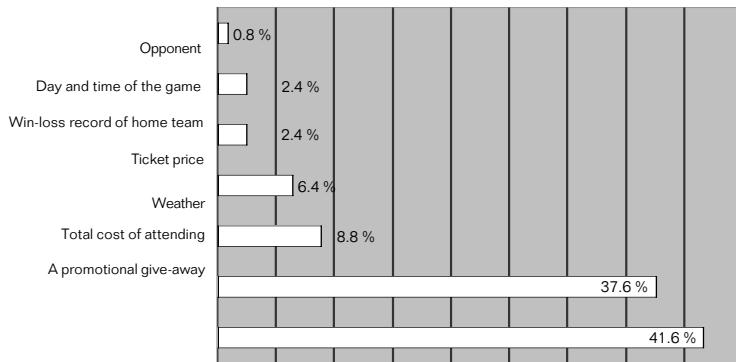
Team	Avg. Ticket	Pct. Change	Avg. Child Ticket	Beer	Soft Drink	Hot Dog	Parking	Program	Cap	FCI	Pct. Change
Boston Red Sox	\$ 42.34	6.70%	\$ 39.68	\$5.25	\$ 3.50	\$ 3.50	\$ 20.00	\$ 3.00	\$ 9.95	\$ 248.44	8.62%
New York Yankees	\$ 24.86	2.47%	\$ 24.26	\$5.75	\$ 3.00	\$ 3.75	\$ 10.00	\$ 5.00	\$ 15.00	\$ 186.74	4.65%
New York Mets	\$ 23.50	4.31%	\$ 22.53	\$6.25	\$ 3.50	\$ 4.50	\$ 10.00	\$ 4.00	\$ 14.00	\$ 182.57	3.13%
San Francisco Giants	\$ 21.63	5.04%	\$ 21.63	\$5.50	\$ 2.75	\$ 3.50	\$ 18.00	\$ 5.00	\$ 15.00	\$ 180.53	6.58%
Seattle Mariners	\$ 23.92	-2.76%	\$ 23.92	\$5.50	\$ 2.50	\$ 3.25	\$ 20.00	\$ 4.00	\$ 9.00	\$ 175.67	1.32%
Chicago Cubs	\$ 24.21	0.68%	\$ 24.05	\$4.50	\$ 2.25	\$ 2.50	\$ 14.00	\$ 5.00	\$ 12.00	\$ 172.52	-5.05%
Houston Texans	\$ 20.78	10.13%	\$ 20.45	\$6.00	\$ 3.50	\$ 3.75	\$ 10.00	\$ 4.00	\$ 12.00	\$ 165.45	4.84%
St. Louis Cardinals	\$ 22.91	6.90%	\$ 20.11	\$6.50	\$ 2.50	\$ 3.00	\$ 10.00	\$ 2.50	\$ 14.00	\$ 164.04	6.56%
Detroit Tigers	\$ 20.43	-0.06%	\$ 20.44	\$4.50	\$ 2.00	\$ 2.75	\$ 10.00	\$ 5.00	\$ 15.00	\$ 159.74	-0.64%
Cleveland Indians	\$ 21.82	-2.27%	\$ 21.82	\$4.25	\$ 2.25	\$ 2.50	\$ 12.00	\$ 1.00	\$ 15.00	\$ 158.78	-1.57%
Atlanta Braves	\$ 17.51	-1.44%	\$ 17.51	\$5.75	\$ 3.50	\$ 3.75	\$ 10.00	\$ 5.00	\$ 12.00	\$ 154.55	3.23%
Philadelphia Phillies	\$ 17.24	12.99%	\$ 16.40	\$5.50	\$ 3.00	\$ 3.25	\$ 8.00	\$ 5.00	\$ 14.00	\$ 149.28	8.63%
MLB Averages	\$ 18.69	2.84%	\$ 17.77	\$5.08	\$ 2.62	\$ 3.00	\$ 10.06	\$ 4.23	\$ 12.28	\$ 148.66	3.29%
Los Angeles Dodgers	\$ 16.38	0.00%	\$ 16.38	\$7.00	\$ 3.50	\$ 3.50	\$ 8.00	\$ 4.00	\$ 12.00	\$ 147.53	1.37%
Chicago White Sox	\$ 17.82	7.38%	\$ 17.82	\$4.50	\$ 2.25	\$ 2.75	\$ 13.00	\$ 4.00	\$ 13.00	\$ 147.27	21.52%
Pittsburgh Pirates	\$ 19.53	-4.81%	\$ 19.53	\$4.00	\$ 2.25	\$ 2.25	\$ 9.00	\$ 5.00	\$ 12.00	\$ 147.13	-2.62%
Tampa Bay Devil Rays	\$ 14.49	-8.50%	\$ 14.49	\$5.00	\$ 3.75	\$ 3.50	\$ 10.00	\$ 5.00	\$ 15.00	\$ 146.95	6.24%
San Diego Padres	\$ 16.23	6.82%	\$ 15.20	\$5.75	\$ 3.25	\$ 2.75	\$ 8.00	\$ 5.00	\$ 14.00	\$ 144.36	8.32%
Colorado Rockies	\$ 15.21	0.00%	\$ 15.21	\$5.25	\$ 3.00	\$ 3.25	\$ 7.00	\$ 5.00	\$ 14.00	\$ 141.34	0.00%
Baltimore Orioles ²	\$ 18.23	0.00%	\$ 18.23	\$4.25	\$ 2.00	\$ 2.50	\$ 7.00	\$ 5.00	\$ 12.00	\$ 140.42	-0.71%
Oakland Athletics	\$ 15.65	4.22%	\$ 14.94	\$5.00	\$ 2.25	\$ 3.00	\$ 12.00	\$ 5.00	\$ 12.00	\$ 138.19	11.07%
Cincinnati Reds	\$ 17.53	5.21%	\$ 16.66	\$5.00	\$ 2.25	\$ 3.25	\$ 8.00	\$ 4.00	\$ 10.00	\$ 136.37	7.26%
Toronto Blue Jays ¹	\$ 16.88	0.19%	\$ 16.88	\$3.74	\$ 2.20	\$ 2.37	\$ 13.60	\$ 3.40	\$ 10.19	\$ 134.05	8.22%
Texas Rangers	\$ 15.98	-11.39%	\$ 15.98	\$5.25	\$ 2.25	\$ 2.25	\$ 8.00	\$ 5.00	\$ 10.00	\$ 130.42	-13.18%
Anaheim Angels	\$ 15.97	35.51%	\$ 15.38	\$5.25	\$ 2.00	\$ 2.75	\$ 8.00	\$ 5.00	\$ 10.00	\$ 130.21	14.46%
Milwaukee Brewers	\$ 16.86	-4.33%	\$ 12.54	\$4.75	\$ 2.00	\$ 2.50	\$ 6.00	\$ 4.00	\$ 12.00	\$ 124.31	-4.93%
Minnesota Twins	\$ 14.40	22.19%	\$ 6.61	\$5.50	\$ 3.00	\$ 3.00	\$ 7.00	\$ 4.00	\$ 13.00	\$ 118.02	-2.57%
Arizona Diamondbacks	\$ 14.60	5.82%	\$ 13.80	\$5.00	\$ 2.50	\$ 3.00	\$ 6.00	\$ 1.00	\$ 10.00	\$ 116.79	1.41%
Kansas City Royals	\$ 12.13	-1.37%	\$ 12.13	\$3.25	\$ 2.00	\$ 2.25	\$ 6.00	\$ 5.00	\$ 12.00	\$ 112.03	-1.47%
Florida Marlins	\$ 12.78	0.48%	\$ 10.26	\$5.25	\$ 2.00	\$ 3.00	\$ 5.00	\$ 5.00	\$ 10.00	\$ 111.58	0.67%
Montreal Expos ¹	\$ 9.00	0.00%	\$ 8.40	\$3.39	\$ 2.04	\$ 2.04	\$ 8.15	\$ 4.08	\$ 10.20	\$ 94.62	11.46%

Average ticket price represents a weighted average of season ticket prices for general seating categories, determined by factoring the tickets in each price range as a percentage of the total number of seats in each ballpark. Luxury suites are also excluded from the survey. Season-ticket pricing is used for any team that offers some or all tickets at lower prices for customers who buy season tickets.

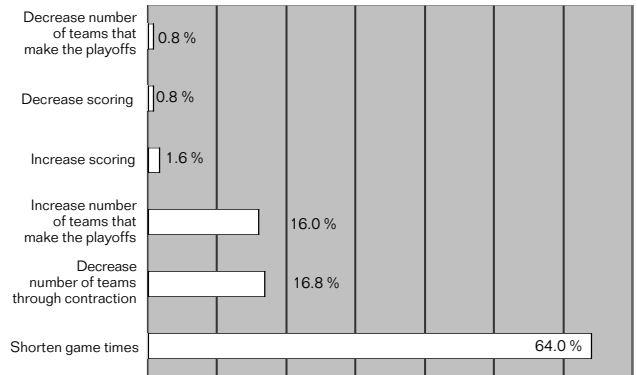
The Fan Cost Index™ comprises the prices of two (2) adult average-price tickets, two (2) child average-price tickets, two (2) small draft beers, four (4) small soft drinks, four (4) regular-size hot dogs, parking for one (1) car, two (2) game programs and two (2) least expensive, adult-size adjustable caps. Costs were determined by telephone calls with representatives of the teams, venues and concessionaires. Identical questions were asked in all interviews.

Notes: ¹Canadian prices are converted to U.S. dollars at a rate of US\$1=C\$1.471. (Last season, the rate was US\$1=C\$1.595.) ²2003 Baltimore Orioles concession prices were not released by the team at press time figures are from 2002.

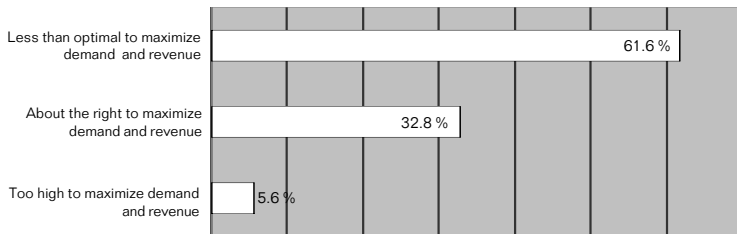
Which of the following do you think is the most important decision factor that fans consider when buying an individual ticket to a Major League Baseball Game?



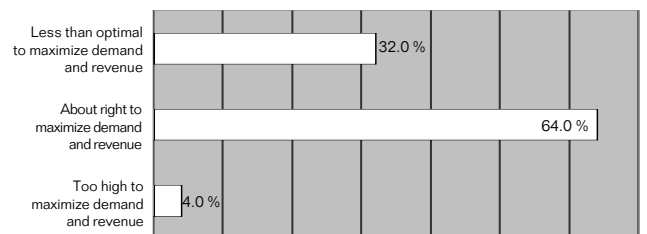
Which of the following adjustments do you feel would most help MLB increase its fan base?



The average cost for a family of four to attend a MLB game in 2003 is estimated to be \$150.00. Do you feel this average cost to attend a game is:



The average MLB ticket price for the 2003 season is estimated to be \$19.00. Do you feel this average ticket price is:



Source: Turnkey Sports (www.turnkeysports.com)

Fan Cost Index reports average ticket price increase of 2.8% to \$18.69

The Major League Baseball average ticket price increased 2.8 percent to \$18.69, according to the 2003 MLB Fan Cost Index (FCI) survey conducted by Chicago-based sports marketing publication, *Team Marketing Report*.

Team Marketing Report's exclusive survey takes a representative look at how much a family four will spend at a baseball game. In 2003, a family of four can expect to spend on average \$148.66 for an outing to a MLB game this year, an increase of 3.29 percent from last season.

The MLB FCI comprises the price of two (2) adult average-price tickets, two (2) child average-price tickets, two (2) small draft beers, four (4) small soft drinks, four (4) regular-size hot dogs, parking for one (1) car, two (2) game programs and two (2) least-expensive adult-size caps.

With a number of new top-tiered priced seating locations installed, the Boston Red Sox, for the sixth consecutive season, possess MLB's highest ticket average at \$42.34, up 6.7 percent from last season. The Red Sox also will be the most expensive family outing with a FCI of \$248.44, a 8.6 percent increase.

The Montreal Expos are again baseball's best bargain by holding their prices steady with a U.S.\$9.00 average ticket price. (Editor's note: The Expos figures incorporate only home games played in Montreal.) A family outing in Montreal is also the least expensive with a FCI of U.S.\$93.31, up 9.9 percent from last year.

Last season's World Series Champions, the Anaheim Angels, and American League runner-up, the Minnesota Twins, netted the highest average ticket price increase. The Angels average ticket price is now \$15.97, up 35.5 percent from a year ago, the largest increase in

the league. The Twins average ticket price increased 22.2 percent to \$14.40. The Philadelphia Phillies, who signed several high-priced free agents this winter, average ticket price increased 13.0 percent to \$17.24, the largest jump in the National League.

Eight major league baseball teams' average ticket price dropped since last season. The Texas Rangers decreased ticket prices by 11.39 percent to \$15.98, the highest decline in all of baseball. The Rangers also had the greatest drop in the FCI. A family of four will spend \$130.42, 13.18 percent less than they did a year ago.

According to a poll of 250 senior-level sports executives conducted in March by Maryland-based sports research firm Turnkey Sports and released exclusively to Team Marketing Report, 64.0 percent of those surveyed said MLB ticket prices are "about right to maximize demand and revenue."

Thirty-two percent of the executives consider ticket prices "too high" and 4.0 percent view them as "less than optimal." However, 61.6 percent of the same executives said the overall cost of attending a MLB game, including concession items, is "too high to maximize demand and revenue." Another 32.8 percent said prices are "about right" and 5.6 percent said they are "less than optimal."

The current season's average ticket price and FCI for the remaining leagues: NFL \$50.02 and \$290.41, respectively; NHL \$41.56 and \$240.43; NBA \$43.65 and \$254.86.

Each leagues complete report is available for viewing at www.teammarketing.com.

Identical information is collected for all teams. The 2003 surveys for the NFL, NHL and NBA will be published approximately one week before the start of the season.