

team marketing research

Team	Avg. Ticket	Pct. Change	Avg. Prem. Ticket	Beer	Soft Drink	Hot Dog	Parking	Program	Cap	FCI	Pct. Change
New Jersey Devils*	\$68.08	24.5%	n/a	\$5.00 ¹⁴	\$2.75 ²⁰	\$3.50	\$8.00	\$5.00	\$15.00	\$363.33	17.3%
Detroit Red Wings	57.11	0.7%	n/a	5.00 ¹⁶	2.00 ¹²	2.75	7.00	7.00	20.00	318.44	-3.6%
Philadelphia Flyers	57.06	0.0%	141.64	5.50 ¹²	3.50 ²⁴	3.75	10.00	5.00	15.00	318.27	2.4%
Toronto Maple Leafs	56.90	0.0%	137.97	4.38 ¹⁴	2.39 ²⁰	2.77	14.81	3.70	14.80	308.79	0.0%
Boston Bruins	54.10	5.3%	76.32	4.00 ¹⁴	2.50 ¹⁴	3.00	18.00	10.00	10.00	304.39	3.7%
New York Islanders~	58.00	38.3%	119.67	5.50 ²⁰	2.50 ¹⁴	5.00	10.00	n/a	15.00	293.57	25.1%
Chicago Blackhawks	50.00	5.1%	74.53	5.00 ¹⁶	3.00 ¹⁶	3.00	16.00	5.00	13.00	286.00	3.5%
New York Rangers	44.58	0.0%	133.33	5.75 ²⁰	3.00 ²⁴	3.50	20.00	10.00	12.00	279.83	0.0%
Ottawa Senators~	52.36	10.5%	95.68	4.26 ¹⁴	2.96 ²⁰	2.78	3.70	n/a	14.82	274.25	14.4%
Los Angeles Kings	46.63	-3.1%	105.24	7.25 ¹⁶	3.50 ¹⁶	3.75	10.00	5.00	12.00	274.00	-2.1%
Minnesota Wild	49.72	7.9%	83.65	4.00 ¹⁶	2.50 ¹⁶	3.00	10.00	2.00	10.00	262.89	5.9%
Washington Capitals	43.40	4.0%	95.21	4.50 ¹⁶	2.50 ¹⁶	2.50	20.00	5.00	15.00	262.59	7.2%
Vancouver Canucks	50.03	7.4%	95.39	5.38 ¹⁶	2.97 ²⁰	2.78	n/a	2.22	10.39	259.10	5.6%
NHL AVERAGE	44.22	3.3%	86.42	5.05¹⁶	2.75¹⁷	3.01	10.19	4.18	13.84	256.23	4.1%
Pittsburgh Penguins~	41.65	-11.7%	104.63	5.25 ²¹	2.50 ¹⁶	3.75	13.00	5.00	15.00	255.10	-1.6%
San Jose Sharks~	39.15	0.0%	81.50	6.50 ¹⁶	3.75 ¹⁶	4.25	13.00	4.00	14.99	252.57	3.7%
St. Louis Blues	42.78	0.2%	87.69	4.75 ¹⁴	2.75 ¹²	2.75	10.00	5.00	12.99	248.60	0.2%
Columbus Blue Jackets	41.77	-4.9%	96.32	5.50 ²⁰	2.75 ¹⁶	2.75	15.00	2.00	14.00	247.07	-3.3%
Nashville Predators~	42.50	-0.9%	80.40	6.25 ¹⁶	2.75 ¹⁶	2.50	10.00	n/a	14.99	243.47	2.0%
Colorado Avalanche	42.18	3.8%	96.00	5.25 ¹⁶	3.25 ¹²	2.00	10.00	5.00	11.00	242.20	2.6%
Atlanta Thrashers*	34.87	-13.4%	84.48	5.75 ²⁰	3.25 ¹⁴	3.75	10.00	8.00	15.99	236.97	-5.3%
Dallas Stars	38.34	0.0%	93.46	4.00 ¹²	2.75 ¹⁵	3.75	9.00	6.00	12.99	234.33	0.0%
Mighty Ducks of Anaheim~	41.25	10.5%	89.23	5.75 ¹⁴	2.75 ²¹	2.75	10.00	n/a	10.00	228.51	7.6%
Montreal Canadiens	40.84	0.0%	81.06	3.89 ¹⁴	2.21 ²⁰	2.21	11.57	2.96	7.40	221.10	0.0%
Edmonton Oilers	36.59	6.0%	82.79	4.45 ¹⁶	2.04 ¹⁶	2.78	4.45	3.70	15.57	217.54	4.9%
Florida Panthers	29.76	-8.7%	60.66	5.50 ²⁰	3.25 ²⁰	4.00	10.00	4.00	20.00	217.04	4.9%
Phoenix Coyotes	31.32	0.0%	86.66	5.00 ¹⁶	2.50 ¹⁶	3.00	7.00	5.00	20.00	214.28	0.0%
Tampa Bay Lightning~	36.25	21.1%	83.32	4.50 ¹⁴	3.50 ¹²	1.00	6.00	n/a	18.00	214.00	16.5%
Buffalo Sabres	35.46	-6.6%	78.00	5.00 ²²	2.00 ¹²	2.00	7.00	5.00	12.00	208.83	-6.3%
Calgary Flames	36.46	1.3%	80.58	3.67 ¹⁴	1.75 ¹⁶	2.44	5.22	3.73	11.19	204.98	14.6%
Carolina Hurricanes	31.77	0.0%	67.22	5.00 ¹⁶	2.75 ²⁰	3.00	7.00	1.00	12.00	193.06	0.0%

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 arena. Premium seating (tickets that come with at least one added amenity) are not included in the survey to calculate average ticket price. In order to calculate an accurate "percentage change," we used the new formula for last season's prices for all general seating categories. 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. Superscript numbers next to Beer and Soft Drink prices denote smallest available size in ounces.

Prices for Canadian teams are converted to US dollars and comparison prices were converted using the current exchange rate.

* Prices listed as reported on the team's Web site.

~ Denotes teams that do not produce a game program or provide it to fans at no cost.

All over the boards: No distinct pattern in NHL FCI

Ticket price increases 3.3 percent to \$44.22; Fan Cost Index rises 4.1 percent to \$256.23

The 2003 NHL Fan Cost Index (FCI) exposed scattered changes with six teams decreasing prices, six teams maintaining last season's prices and 18 teams increasing prices.

The average NHL ticket price increased for the second consecutive season, rising 3.3 percent to \$44.22

Traditionally, the Stanley Cup winners from the previous season show the sharpest increase in ticket prices. But the New York Islanders' average ticket price increased a staggering 38.3 percent, overwhelming the New Jersey Devils' 24.5 percent hike. The teams' FCI figures increased 25.1 and 17.3 percent, respectively.

The Islanders' ticket price increase may be a result of variable ticket pricing. Rather than charging a flat fee for all games, the Islanders assess the value of each matchup. Traditional rivalries and high-profile competitors may warrant a higher ticket price.

Other double-digit ticket price increases include the Tampa Bay Lightning (up 21.1 percent), the Mighty Ducks of Anaheim (up 10.5 percent) and the Ottawa Senators (up 10.5 percent).

New Jersey's increase makes the Devils the most expensive NHL team to watch, costing nearly \$45 more than the next most expensive team, the Detroit Red Wings. According to the Devils Web site, general ticket prices range between \$20 and \$90.

The Devils and the Red Wings edged the Philadelphia Flyers out of its traditional position. The past three seasons, Philadelphia ranked either first or second in the FCI category. The Flyers did not raise ticket prices for the 2003-04 season, and the team's FCI increased a mere 2.4 percent.

Major FCI decreases include the Buffalo Sabres (down 6.3 percent) and the Atlanta Thrashers (down 6.5 percent) and the Columbus Blue Jackets (down 3.3 percent).

Perhaps the most surprising change in the 2003-04 NHL FCI is the number of teams that reported no change from the previous season's pricing. The Carolina Hurricanes, the Dallas Stars, the New York Rangers, and the Toronto Maple Leafs and the Montreal Canadiens are maintaining their 2002-03 prices for the upcoming season.

Major FCI ranking changes to note: Atlanta (dropped from No. 11 to No. 20), Toronto (moved from No. 8 to No. 4), Edmonton (moved from No. 30 to No. 24), and Buffalo (dropped from No. 20 to No. 28).

Luxury seating followed a similar trend as 12 teams reported no increase. Of the remaining teams, only three showed a serious increase. The Chicago Blackhawks, the Islanders and the Senators each increased premium seat prices by more than 10 percent.

On the other hand, Atlanta, Dallas and the Florida Panthers reported luxury seat decreases of greater than 20 percent.

The premium seating category dropped to \$86.42, down 1.7 percent from last season.

The Phoenix Coyotes, opening the new Glendale Arena in De-

cember, maintained ticket pricing while still occupying America West Arena. Price increases will be reflected in the 2004 NHL FCI.

Although the price changes in the NHL FCI appear inconsistent, most team's alterations delineate the activities in specific geographic markets.

Table I—2003 NHL/NFL FCI Comparisons

City	NHL FCI	% of Change	NFL FCI	% of Change
Detroit	318.44	-3.6%	305.64	5.1%
Philadelphia	318.24	2.4%	341.48	26.4%
Boston	304.39	3.7%	405.22	-0.8%
New York	293.57	25.1%	346.30	8.0%
Chicago	286.00	3.5%	367.98	17.3%
Minnesota	262.89	5.9%	325.98	3.3%
Washington	262.59	7.2%	372.14	-3.6%
St. Louis	248.60	0.2%	306.08	4.0%
Colorado	242.24	2.6%	317.12	-1.2%
Atlanta	236.97	-6.5%	232.04	21.1%
Pittsburgh	255.10	-1.6%	302.61	6.7%
Nashville	243.47	2.0%	264.41	1.8%
Dallas	234.33	0.0%	292.23	4.4%
Phoenix	214.28	0.0%	229.67	4.2%
Tampa Bay	214.00	16.5%	296.63	9.8%
Buffalo	208.83	-6.3%	251.18	8.5%
Carolina	193.06	0.0%	244.06	3.4%
LEAGUE AVG.	256.23	4.1%	301.75	3.9%

Table I—2003 NHL/NFL FCI Comparisons depicts the FCI similarities and difference between teams in the same city or market.

The FCI increased almost identically for both the NHL and the NFL at 4.1 percent and 3.9 percent, respectively. Conversely, the 2002 FCI reported an NHL increase of 0.5 percent and an NFL increase of 4.2 percent. The 2003-04 FCI findings suggest some market stabilization.

The teams in Chicago, New York, Minnesota, St. Louis and Tampa Bay shared increases in both ticket price and FCI.

EDITOR'S NOTE: The NHL 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, (4) regular-size hot dogs, parking for one (1) car, two (2) game programs and two (2) least-expensive, adult-size caps.

Team Marketing Report included premium seat pricing in the average ticket cost from 1992 to 2001. The 2002 and 2003 FCI's include only a general seating average for the listed ticket price. Research was obtained from ticket sales executives or from Web sites of each NHL team.