

team marketing research

Team	Avg. Ticket	Pct. Change	Avg. Prem. Ticket	Beer ¹	Soft Drink ¹	Hot Dog	Parking	Program	Cap	FCI	Pct. Change
New Jersey Devils	\$54.67	0.0%	---	\$5.00 ¹⁴	\$2.75 ²⁰	\$3.00	\$8.00	\$10.00	\$15.00	\$309.68	0.0%
Boston Bruins	53.05	-3.9%	78.35	5.50 ¹⁶	2.50 ¹⁴	3.50	18.00	4.00	18.00	309.22	0.1%
Philadelphia Flyers	54.81	-4.0%	140.75	5.75 ¹²	3.75 ²⁴	3.75	10.00	5.00	12.00	304.72	-4.2%
Vancouver Canucks ²	54.08	0.6%	106.25	5.95 ¹⁶	3.40 ²⁰	3.19	17.00	2.55	11.90	300.47	0.0%
Montreal Canadiens ²	47.58	-0.7%	90.70	4.62 ¹⁴	2.77 ²⁰	2.58	17.00	3.61	19.51	284.20	2.9%
Minnesota Wild	50.11	0.0%	83.75	4.75 ¹⁶	2.75 ¹⁶	3.00	10.00	2.00	18.00	282.92	7.0%
New York Rangers*	44.63	0.1%	124.50	5.75 ²⁰	3.00 ²⁴	3.50	20.00	10.00	12.00	280.00	0.1%
Toronto Maple Leafs ²	49.23	-4.9%	125.57	4.25 ¹⁴	2.13 ²⁰	2.34	12.75	2.13	12.75	265.81	-3.7%
Tampa Bay Lightning	44.27	2.3%	81.90	6.00 ¹²	3.50 ¹²	4.00	10.00	0.00	18.00	265.09	9.5%
Los Angeles Kings	43.82	-8.9%	105.24	7.25 ¹⁶	3.50 ¹⁶	3.75	10.00	5.00	12.00	262.78	-6.1%
Detroit Red Wings ⁴	43.13	-24.5%	58.58	5.00 ¹⁶	2.00 ¹²	2.75	10.00	5.00	20.00	261.51	-17.9%
Atlanta Thrashers ³	41.68	12.9%	88.23	5.75 ²⁰	2.00 ¹⁴	3.75	10.00	8.00	15.99	259.19	7.9%
New York Islanders	44.01	-17.2%	97.92	5.50 ²⁰	3.00 ¹⁴	5.00	6.75	0.00	15.00	255.77	-12.9%
NHL AVERAGE	41.19	-7.5%	87.49	5.23¹⁶	2.85¹⁷	3.23	11.03	3.60	15.05	247.84	-3.6%
Calgary Flames ²	40.92	-0.7%	89.16	4.46 ¹⁴	2.76 ²⁴	2.98	8.50	4.25	16.99	246.53	4.9%
Columbus Blue Jackets	41.62	-5.2%	82.50	5.50 ²⁰	2.75 ¹⁶	2.75	15.00	2.00	14.00	246.46	-3.6%
Edmonton Oilers ²	43.46	6.8%	98.57	5.53 ¹⁶	2.98 ¹⁶	3.19	4.25	3.40	12.74	246.10	8.5%
Ottawa Senators ²	40.76	-12.1%	80.48	4.18 ¹⁴	2.96 ²⁰	2.98	8.50	0.00	19.55	242.76	-8.7%
Chicago Blackhawks*	38.26	-11.7%	65.55	5.00 ¹⁶	3.00 ¹⁶	3.00	16.00	5.00	13.00	239.04	-7.8%
St. Louis Blues*	39.92	-2.8%	83.67	4.75 ¹⁴	2.75 ¹²	2.75	10.00	5.00	12.99	237.17	-1.9%
Colorado Avalanche	38.48	-8.5%	112.45	6.00 ¹⁶	3.75 ¹⁶	3.75	10.00	5.00	9.99	235.91	-3.4%
Washington Capitals	38.15	-12.4%	94.82	4.50 ¹⁶	2.50 ¹⁶	2.50	15.00	5.00	12.00	230.61	-8.6%
Nashville Predators	37.33	-14.5%	77.03	4.75 ¹⁶	2.75 ¹⁶	3.75	10.00	0.00	15.00	224.82	-7.0%
Florida Panthers	34.31	5.3%	89.24	6.25 ²⁰	3.74 ²⁰	4.00	8.00	0.00	18.00	224.69	10.8%
Dallas Stars ⁴	34.24	-23.1%	101.32	4.00 ¹⁶	2.75 ¹⁵	3.75	12.00	5.00	14.99	222.94	-14.0%
San Jose Sharks	33.00	-14.3%	76.92	4.50 ¹⁶	2.50 ¹⁶	3.75	13.00	5.00	15.00	219.02	-9.1%
Pittsburgh Penguins	36.61	-16.4%	100.99	5.25 ²¹	2.50 ¹⁶	2.50	10.00	0.00	15.00	216.96	-11.7%
Mighty Ducks of Anaheim	30.32	-19.5%	80.26	6.25 ¹⁶	3.50 ¹⁶	3.00	10.00	0.00	18.00	205.77	-3.7%
Phoenix Coyotes	27.37	-16.7%	80.09	5.00 ¹⁶	2.50 ¹⁶	3.00	7.00	5.00	20.00	198.49	-9.9%
Buffalo Sabres	29.73	-16.2%	69.00	5.00 ²²	2.00 ¹²	2.00	7.00	5.00	12.00	185.90	-11.0%
Carolina Hurricanes	26.15	-16.8%	61.02	5.00 ¹⁶	2.75 ²⁰	3.00	7.00	1.00	12.00	170.61	-11.0%

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 stadium. Premium seating (tickets that come with at least one added amenity) are not included in the ticket average. 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 four (4) 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.

* Prices listed as reported on team's Web site

1. Superscript figures beside the beer and soda prices denote the ounces of the beverage.
2. All prices are converted to USD at the exchange rate of \$1CAD=\$0.85USD or \$1USD=\$1.176CAD.
3. The 2005-06 ticket pricing for the Atlanta Thrashers did not increase from the prices for the 2004-05 cancelled season.
4. The Detroit Red Wings and Dallas Stars changed the classification of some seating categories, resulting in the major price decreases.

Icing prices: NHL ticket costs decrease for return season

Average ticket price down 7.5 percent to \$41.19; Fan Cost Index drops 3.6 percent to \$247.84

The 2005-06 National Hockey League Fan Cost Index exposed major price decreases following the cancellation of the 2004-05 season. The average ticket price declined by 7.5 percent to \$41.19, dropping below 2002 levels. These price reductions are the only major percent decreases reported in the 12-year history of the FCI study for any league.

As no regular season tickets were sold for 2004, the 2005 ticket prices were compared with numbers reported by each team for the 2003-04 season. However, prices reported prior to the 2004 lockout revealed that the average ticket price would have been approximately 1 percent greater than the 2003 numbers.

More than two-thirds of the 30 teams reported significant season ticket price reductions, with 19 teams cutting back FCI totals.

Purchasing a ticket to a Philadelphia Flyers game will set fans back \$54.81, on average, making the team one of the priciest in the NHL to watch. For 14 cents less, New Jersey Devils fans can watch a home game at Continental Airlines Arena (\$54.67). Even though both teams top the average ticket price category, neither increased ticket prices for the 2005 season. The Devils' prices held steady from their 2003 figures, and the Flyers actually decreased season ticket costs by 4 percent. Similarly the Vancouver Canucks bumped up ticket prices by less than 1 percent, but are now the fourth-most expensive team to watch in professional hockey.

The Detroit Red Wings had perennially been one of the costliest tickets in the NHL. The team lowered the average season ticket price by nearly \$14 to \$43.13, a reduction of more than 24 percent. Other teams with double-digit ticket price reductions include the Dallas Stars (down 23.1 percent), the Mighty Ducks of Anaheim (down 19.5 percent), the New York Islanders (down 17.2 percent), the Carolina Hurricanes (down 16.8 percent), the Phoenix Coyotes (down 16.7 percent), the Pittsburgh Penguins (down 16.4 percent), the Buffalo Sabres (down 16.2 percent), the Nashville Predators (down 14.5 percent), the San Jose Sharks (down 14.3 percent), the Washington Capitals (down 12.4 percent), the Ottawa Senators (down 12.1 percent) and the Chicago Blackhawks (down 11.7 percent).

The Atlanta Thrashers showed the greatest ticket price increase (up 12.9 percent to \$41.68). However, Thrashers executives reported that these figures did not rise from 2004 prices. The team also added a selection of new ticket packages that are not reflected in the FCI study. Earlier this year, the Thrashers reported they didn't feel justified in lowering ticket prices further. The team had consistently been below the NHL average for season ticket cost and FCI ranking. As the Thrashers' on-ice product has improved their revenues remained flat, and decreasing ticket prices could have resulted in more lost revenue (*for more information, see TMR Aug. 2005*).

Only four other teams reported increasing ticket prices: the Edmonton Oilers (up 6.8 percent), the Florida Panthers (up 5.3 percent), the Tampa Bay Lightning (up 2.3 percent) and the Vancouver Canucks (up 0.6 percent).

The Hurricanes, who have remained near the bottom of the NHL ticket price rankings for five years, are again hockey's best bargain. On average, fans will pay \$26.15 for a seat at the RBC Center. The

Coyotes (\$27.37), Sabres (\$29.73) and Mighty Ducks (\$30.32) are the next least-expensive teams.

The FCI also takes a representative look at how much a family of four will likely spend at a hockey game for the 2005-06 season.

With a 3.6 percent decrease, a family can expect to pay, on average, \$247.84 to take in a game during the NHL's comeback season.

The NHL FCI comprises the price of four tickets, two small draft beers, four small soft drinks, four regular-sized hot dogs, parking for one car, two game programs and two adult-sized caps. All concession and merchandise listed in the FCI chart (*see previous page*) are the least-expensive products offered in each stadium.

Joe Louis Arena is no longer the most expensive stadium in which to watch a hockey game. With the decrease of the Red Wings' ticket prices and total FCI, the facility is much closer in price to the NHL average. As mentioned above, the Continental Airlines Arena is the costliest place to take in any game with an FCI of \$309.68. The TD Banknorth Garden, home to the Boston Bruins, is a close second (FCI of \$309.22), and the Flyers' Wachovia Center rounds out the top three (FCI of \$304.72). Of those teams, none increased FCI prices significantly.

Teams that reported FCI reductions of more than 10 percent include: the Red Wings (down 17.9 percent), the Stars (down 14 percent), the Islanders (down 12.9 percent), the Penguins (down 11.7 percent), the Sabres (down 11 percent) and the Hurricanes (down 11 percent).

The Panthers reported that a family of four can expect to spend 10.8 percent more at the newly-named BankAtlantic Center than they did during the last hockey season. However at \$224.69, the cost is still well below the NHL average. Similarly, the Lightning reported bumping up total FCI by 9.5 percent.

Other FCI increases were made by: the Oilers (up 8.5 percent to \$246.10), the Thrashers (up 7.9 percent to \$259.19), the Minnesota Wild (up 7 percent to \$282.92), the Calgary Flames (up 4.9 percent to \$246.53) and Montreal Canadiens (up 2.9 percent to \$284.20).

Concession prices have been steadily increasing over the past five years. **Chart I—Tracking Concession Trends** shows the consistent elevation of beer, soft drink and hot dog costs in the NHL. It is interesting to note that although ticket and total FCI prices decreased for the 2005-06 season, the concession prices have continued to rise.

Table I—Tracking NHL Concession Trends

Year	Beer	Soda	Hot Dog
2005-06	\$5.23 ¹⁶	\$2.85 ¹⁷	\$3.23
2004-05	5.05 ¹⁶	2.85 ¹⁷	3.09
2003-04	4.92 ¹⁶	2.72 ¹⁷	2.95
2002-03	4.55 ¹⁶	2.51 ¹⁷	2.98
2001-02	4.43 ¹⁶	2.50 ¹⁸	2.82