

# J.D. POWER



## 2017 Fan Experience Study

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*“The Fan Experience Study provided us comprehensive feedback in all of the most critical areas of our business. We constantly strive improve the guest experience, and the analytics provided to us were instrumental in shaping future decisions.”*

— **Aaron Teats**, Chief Marketing Officer and  
Vice President, Anaheim Ducks

## 2017 Fan Experience Study

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Just as quickly as a player may be traded to another team, fan sentiment can change. Collecting and analyzing feedback from fans in your market is important to not only provide a highly satisfying experience, but to also better understand your fans' perceptions, expectations, intentions, and behaviors, which can help identify and prioritize performance improvement initiatives—as well as maximize your overall return on investment. J.D. Power's actionable market intelligence can help your organization acquire and retain loyal fans, while also increasing your revenue stream with new single-game buyers and season-ticket holders.

### The Solution

The *J.D. Power 2017 Fan Experience Study*<sup>SM</sup> measures satisfaction among sports fans who attended a National Football League,<sup>®</sup> Major League Baseball,<sup>®</sup> National Hockey League,<sup>®</sup> Major League Soccer,<sup>®</sup> or National Basketball Association<sup>®</sup> event in the following U.S. market areas: New York; Los Angeles; Houston; Chicago; Miami; Denver; Washington, D.C.; Philadelphia; Dallas; San Francisco/Oakland; and Boston. The overall fan experience is comprised of the following factors of satisfaction (in order of importance): Seating Area and Game Experience; Security and Ushers; Leaving the Game; Arriving at the Game; Food and Beverage; Ticket Purchase; and Souvenirs and Merchandise.

The *2017 Fan Experience Study* is more comprehensive and representative of measuring the fan experience than internal team surveys since it is not limited to season ticket holders and single-game ticket buyers. Instead, the study significantly broadens the population to include not only the aforementioned fans, but also secondary-market ticket buyers and friends as well as relatives and colleagues who did not buy a ticket but attended with someone who did. The study, which provides the sports industry with insights into the evolving needs and demands of fans and sponsors, includes the following objectives:

- **Quantify performance metrics** among major professional sports fans who attended a game
- Benchmark satisfaction enabling **fan experience comparisons** in market area
- Analyze **fan game-day experiences** and **behaviors**
- Capture **team image data**
- **Quantify un/aided brand awareness** for beverage sponsors for each stadium in your market
- Deliver insights into what drives **fan and sponsor loyalty**



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## How It Works

### Sampling

The *Fan Experience Study* includes the largest sports franchises among 11 major U.S. market areas. The study, which is based on the responses of more than 10,000 fans who attended a game within the past 12 months, was fielded in January/February 2017 for NFL, NBA, and NHL franchises, and in June 2017 for MLB and MLS franchises. Refer to the Appendix for a list of major sports organizations evaluated in the study.

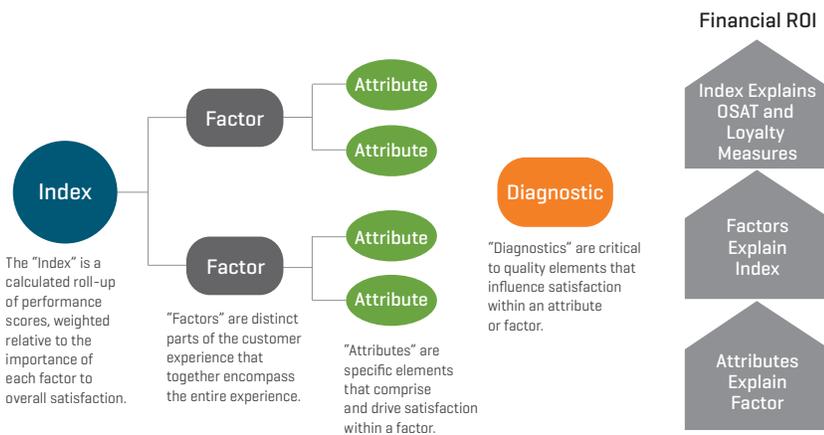
Refer to the Appendix for a list of major sports organizations evaluated in the study.

### J.D. Power Index

Based on data obtained from the survey, an overall index is created that quantifies the impact the factors that measure the entire customer experience and the attributes within them have on customer satisfaction. Specifically, the relative weight that each attribute contributes to the factor index is first calculated, followed by calculating the relative weight that each factor contributes to the overall satisfaction index. The results of those calculations are used to predict overall satisfaction based on a weighted sum of the factors, which constitutes the overall index.



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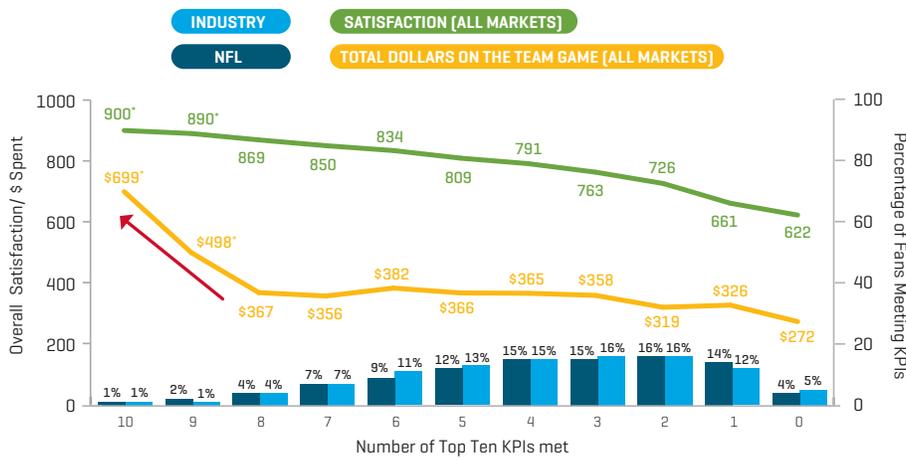
### Award Criteria

The highest-ranked sports organization within its respective geographic market receives a trophy. Award recipients that subscribe to the study have the opportunity to publicly leverage this award through J.D. Power's award licensing program.

## What Study Data Does for Professional Sports Franchises

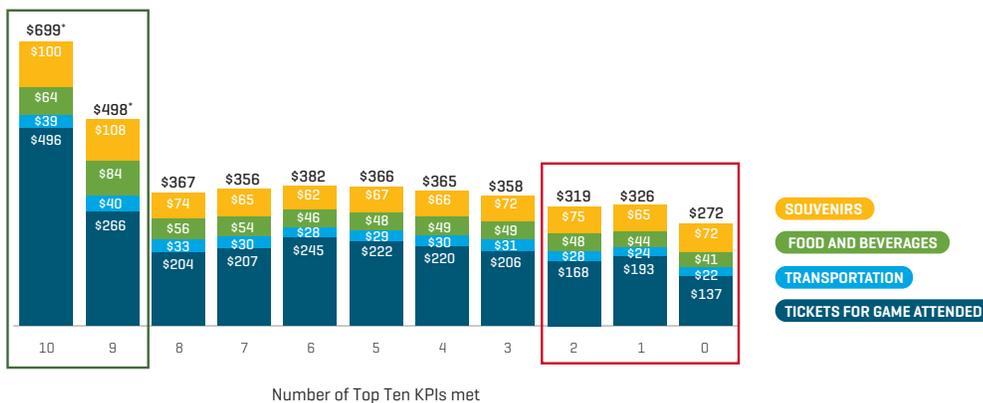
J.D. Power has identified 10 Key Performance Indicators (KPIs), or behaviors, that significantly drive overall fan satisfaction, advocacy, and loyalty for teams. These behaviors, when coupled together, have a direct impact on fan spending. Most teams in our 2016 study are only meeting an average of 3.8 KPIs on a consistent basis. When all 10 KPIs are met, fan spending at games (parking, tickets, food and beverages, and souvenirs) increase by 90%.

Impact on Satisfaction and Dollars Spent when Top 10 KPIs are met



\*Small Sample 30<N<100.

Impact on Satisfaction and Dollars Spent when Top 10 KPIs are met (All Markets)



\*Small Sample 30<N<100.

The 2017 Fan Experience Satisfaction Study identifies how your team performs against these KPIs and any other KPIs specific to fans within your market.

## Oversampling

J.D. Power offers a proprietary oversample opportunity allowing sports organizations that are not currently profiled in the syndicated study to obtain competitive data sets in order to benchmark their performance against competitors that are profiled in the study. This opportunity is also available for profiled organizations that want to dive deeper into a specific topic covered in the study. The same questionnaire used for the syndicated study is used for the proprietary oversample study.

## Subscription Details

The *2017 Fan Experience Study* provides access to the insights and tools needed to gain a comprehensive, in-depth understanding of how your company is performing and to identify key areas needing improvement.

### Study deliverables include:

- Detailed industry findings: Competitive performance overview by factor
- Access to a personalized competitive data set that allows you to see how your organization stacks up against your competitors, the industry, and the highest performers across factors and attributes at the national and market level
  - Competitive data set in SPSS and Excel file format
  - Verbatim comments: Full search functionality allows rapid access to verbatims of interest
- An on-site executive presentation with management insights, which includes customized strategic recommendations, study results, ongoing best practices, and analyses of high-performing sports organizations
- Swoop gap analysis: Highlights improvement opportunities that have the greatest impact on fan satisfaction if improved
- Copy of the current questionnaire

## About J.D. Power

J.D. Power is a marketing, consumer intelligence, and data and analytics company that helps its clients measure, understand, and improve the key performance metrics that drive their growth and profitability. J.D. Power's industry benchmarks, unique data and analytics platform, and reputation for independence and credibility has established the company as one of the world's most well-known and trusted providers of Voice of the Customer insights. Established in 1968, J.D. Power is headquartered in Costa Mesa, California, and has offices in North/South America, Asia Pacific, and Europe.



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## APPENDIX: Profiled Brands

### New York

New York Red Bulls  
Brooklyn Nets  
New York Rangers  
New York Nicks  
New York Islanders  
New York Giants  
New York Jets  
New Jersey Devils  
New York Yankees  
New York Mets

### Los Angeles

Anaheim Ducks  
Los Angeles Galaxy  
Los Angeles Lakers  
Los Angeles Angels  
Los Angeles Kings  
Los Angeles Clippers  
Los Angeles Dodgers

### Houston

Houston Rockets  
Houston Dynamo  
Houston Texans  
Houston Astros

### Chicago

Chicago Fire  
Chicago Bulls  
Chicago White Sox  
Chicago Blackhawks  
Chicago Cubs  
Chicago Bears

### San Francisco/Oakland

San Francisco 49ers  
Oakland Raiders  
San Francisco Giants  
Oakland Athletics  
Golden State Warriors  
San Jose Sharks  
San Francisco Earthquakes

### Dallas/Fort Worth

Dallas Cowboys  
Texas Rangers  
Dallas Mavericks  
Dallas Stars  
FC Dallas

### Boston

New England Patriots  
Boston Bruins  
Boston Red Sox  
Boston Celtics  
Boston Revolution

### Washington, D.C.

Washington Redskins  
Washington Capitals  
Washington Wizards  
Washington Nationals  
D.C. United

### Denver

Denver Broncos  
Colorado Rockies  
Denver Nuggets  
Colorado Avalanche  
Colorado Rapids

### Miami

Miami Heat  
Florida Panthers  
Miami Dolphins  
Florida Marlins

### Philadelphia

Philadelphia 76ers  
Philadelphia Eagles  
Philadelphia Flyers  
Philadelphia Union  
Philadelphia Phillies