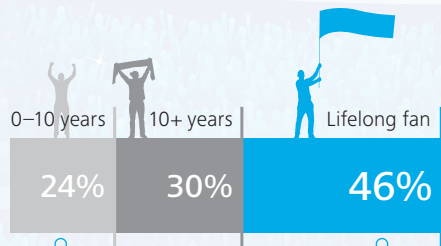


Loyalty scoreboard: exploring fan engagement

In many ways, athletes, teams, and leagues invented the idea of loyalty. They have engendered the sort of passion and engagement that today's consumer loyalty programs work hard to achieve. However, sports organizations cannot only rely on the loyalty that is generated by winning seasons and championship trophies. It will be increasingly important for organizations to understand fan behaviors and preferences to deliver experiences that nurture fans' loyalty and extend it beyond the field.

Fan affinity is influenced by a variety of factors...

Tenure as fan



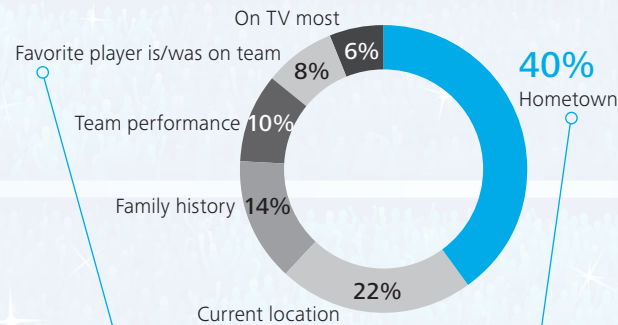
81% of MLS fans have been fans for less than 10 years

60% of MLB fans are lifelong fans

NBA fan loyalty is 2X more likely to be driven by a favorite player

Hometown is a bigger driver of loyalty for the NHL than for any other sport

Primary reason for team loyalty



Fans who played in youth leagues growing up are **50% more likely** to be self-described fanatics...

...and spend **2X more** annually than fans who did not participate in youth leagues

...and translates into different forms of engagement

Millennials are willing to spend extra for memorable experiences:

Pre/postgame events:



Player meet & greets:



Seating based on social interests



Self-described fanatics spend **6X more** than self-described casual fans annually

NFL fans are nearly 2X more likely to be self-described fanatics

Excluding ticket purchases, season ticket holders...

...spend **5X more** annually than non-season ticket holders

...spend **2X more** annually if they participate in off-season events vs. season ticket holders who do not

Deloitte.

www.deloitte.com/us/SportsLoyalty

Background

Deloitte Sports, Deloitte Consulting LLP has conducted a study to closely examine fan loyalty and help leagues and teams understand how to enhance fan engagement, strengthen affinity, and increase overall fan value. The full report will be available in summer 2015.

Methodology

In April 2015, Deloitte fielded a survey to approximately 4,000 sports fans over the age of 18 in the United States. Based on their self-reported affinity level, survey respondents were asked to answer questions regarding their loyalty, engagement, and spend for up to three distinct sports leagues.

This analysis focuses on 9,159 league-level responses across five multi-team leagues: the NFL, MLB, NBA, NHL, and MLS. The full survey included additional responses on subjects not relevant to this analysis; these responses are excluded for the purposes of this analysis but may be evaluated separately.

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