

University of Wyoming
Market Research Study, Fall 2007

Prepared by:

Turnkey Sports & Entertainment

Table of Contents:

1. Key Findings: Conclusions and Recommendations	3
2. Study Overview	5
2.1. Background and Purpose	5
2.2. Methodology and Study Procedures	6
2.3. Limitations	7
3. Detailed Findings	8
3.1. Understanding the Wyoming Football Fans and Their Experience: Attendance Habits	8
3.2. Understanding the Wyoming Football Fans and Their Experience: Factors Affecting Attendance	11
3.3. Understanding the Wyoming Football Fans and Their Experience: Gameday Experience	14
3.4. Premium Seating	25
3.5. Laramie as a Destination on Football Weekends	28
3.6. Demographic Profile of Wyoming Football Fans	30

1. Key Findings: Conclusions and Recommendations

Attendance Habits

- Although Wyoming football home games provide the primary motivation for fans to travel to Laramie, much of their **experience and motivation to attend revolves around more than just the football game itself.**
 - At least an all-day event, the football game presents a valuable opportunity to meet family and old friends and **socialize** with other Wyoming football fans.
 - Wyoming football fans feel their presence at games is necessary not only to show support for the only 4-year institution in the state but to demonstrate support for the state of Wyoming and the fans' **pride** in both the institution and the region. This feeling nurtures a **great sense of camaraderie** among fans in the stands of War Memorial Stadium.

Factors Affecting Attendance

- Regarding attendance, the **current record** of the team is less of a factor than **opponent** and **weather**. The latter two having much more influence on the decision to attend of **non-season ticket holders and fans residing several hundred miles away from Laramie.**
 - For the most dedicated fans of the program – the season ticket holders and other fans residing near Laramie – **weather is a factor only when it creates unsafe driving conditions.**
 - In general, the **Monday morning forecast** is a non-factor, because fans consider it too premature to rely on.
 - Hunting and youth sports activities are factors competing with fans' time on Saturdays, **but not to the extent initially expected.** Family commitments other than youth sports activities are the main competition for Wyoming football.

Game Day Experience

- Wyoming football fans feel the University of Wyoming athletic department and the **city of Laramie especially** can and should **enhance the festive atmosphere around the stadium and the town on gameday.** This would add to the excitement and improve the overall fan experience.
 - **Tailgating** is an important part of fans' gameday experiences as it allows them to socialize and get in the mood for the game. They would like to be able to tailgate longer before the start of the game.
 - The majority of fans **support a game start time of 1 pm or later** during the month of September. The University should seriously consider this concept. Additionally, scheduling a night game early in the season has the potential of attracting a different segment of fans – a somewhat younger crowd of casual Wyoming Football fans.

- Several areas affecting patrons' in-game experience have room for improvement, but **top priority** for the school should be improving fan **experience at concession stands** and in the **restrooms** on the first level of the stadium.
- Secondary consideration should be given to **paving the parking lot** near the stadium, increasing the **width of seats**, installing **TV monitors** on the concourses so fans don't miss the game when in line and improving the **traffic outflow**. One potential quick fix could be broadcasting the post-game conference or show on the stadium video board so some fans can linger longer in the stadium.
- The University of Wyoming athletic department should work harder to **promote and market** the football games and related events to existing and potential supporters of the program. Existing fan perceptions are that games and events can be marketed better.
 - Collecting the contact information of single-game buyers and other fans attending games should be a priority for the athletic department to facilitate inexpensive direct marketing and communication strategies.

Premium Seating

- The majority of fans agree that building premium seating sections at War Memorial Stadium would be **beneficial for the football program**. **At least 12% of the existing season ticket holder base** would seriously consider purchasing premium seating if the University of Wyoming were to introduce it.
 - **Initial** expectations for price of club seats is **\$50 or higher** per game.
- However, if the school moves forward with building the premium seating sections **without** upgrading basic amenities considered a much higher priority, **many fans may be upset**.

Laramie as a Weekend Destination

- Laramie as a weekend destination is a **tough sell** for Wyoming football fans. It does not offer any significant attractions, has a scarcity of restaurants, and only recently have overnight accommodation options begun to improve. Fans who would consider staying in town overnight are those who travel from distant corners of the state or out-of-state.
 - Potential attractions for fans include more restaurants and hotels, and organized events around the football game like concerts or shows on Friday night, pep rallies with the coaches on Friday night, or "reunion-type" events.

Communicate

- Many fans have become aware of this study and the intentions of the University of Wyoming to make capital improvements to War Memorial Stadium. It would only benefit the Athletic Department if it communicated to fans some of the findings of this study and the University's plan of action once it was finalized.

2. Study Overview

2.1 Background and Purpose

The University of Wyoming contracted with Turnkey Sports & Entertainment (Turnkey) to perform a market research study to help make informed decisions pertaining to the short- and long-term success of the University's Football program. In no particular order, the goals identified in September 2007 were as follows:

- ❑ Objective A: Determine the viability and revenue potential of premium seating sections at War Memorial Stadium.
- ❑ Objective B: Learn about the game day experience of University of Wyoming Football fans and provide recommendations for improvement. Prioritize capital improvements based on fan feedback.
- ❑ Objective C: Examine Wyoming Football Fans' perceptions of Laramie and assess whether the introduction of new amenities and attractions would increase the appeal of the town among college football fans and make it a weekend destination during football season.

To deliver on the objectives set forth, Turnkey used a combination of primary and secondary research. **Objective A:** A detailed market analysis of the population's demographic and socioeconomic characteristics was conducted. A comparative market analysis of the Laramie, WY designated market area (within a radius of 100 miles of the town) and that of Division I institutions of similar size and profile as the University of Wyoming. As part of the primary research phase of the project, Turnkey gauged the general interest and propensity of Wyoming Football fans to purchase season tickets in a club seating area at War Memorial Stadium. The analysis and findings are delivered in a separate report from this one. **Objective B, C:** This phase of the study entailed several stages of primary research. First, Turnkey utilized an intercept survey during three University of Wyoming games to create a snapshot of attendees and drivers that brought them to games. The second stage included focus groups and in-depth one-on-one telephone interviews which helped develop an understanding of the University of Wyoming Football fans, their experience at games, their motivation for attending games, etc. Finally, an online survey was used to test the validity of the hypothesis built based on the findings in the qualitative research stage.

2.2. Methodology and Study Procedures

While the following pages focus on the opinion of Wyoming Football fans sometimes divided in several different segments based on their age, household income, residence, etc., the two most important and clearly defined segments of fans reviewed here are *season ticket holders* (STHs) and *non-season ticket holders* (non-STHs), which are typically single game buyers.

For the first stage of the primary research phase of the study, Turnkey developed a questionnaire in collaboration with the University of Wyoming's Athletic Department. Approximately 2-minutes in length, this survey was administered to attendees in parking lots (including Tailgate Park) and inside War Memorial Stadium during three Cowboys home games - vs. New Mexico (Oct. 13th), vs. UNLV (Oct. 27th) and vs. Brigham Young University (Nov. 17th). A total of 330 interviews were completed across the two segments: 136 with season ticket holders and 194 with non-season ticket holders. The sample size of 330 is reliable within plus or minus 5.5 percentage points at the 95 percent confidence level. Subgroup data are less reliable: sample sizes of 136 and 194 are projectable within 8.5 percentage points and 7.2 percentage points respectively.

Season ticket holders, single game buyers and alumni were recruited to two separate locations (Cheyenne, WY and Ft. Collins, CO), where on November 14th and 15th 2007 a total of six focus groups were conducted. Two facilities were used to broaden the geographical reach of the study. Turnkey recruited 14 participants per focus group for a targeted show of 10. All participants were selected from a database list provided by the University of Wyoming. Participants were prescreened to ensure they had attended at least one University of Wyoming football home game in the last twelve months, were currently not students at the university and were at least 18 years old. A mix of STHs, alumni non-STHs and single-game buyers was attempted. In addition, Turnkey attempted a 9:5 mix of males to females and a 5:5:4 mix of fans in the following age brackets: 34 or younger, 35 – 54, 55 or older. Participants were offered a \$50 honorarium for their time and once they confirmed they were able and willing to attend, Turnkey sent a letter to each one of them with directions. Reminder phone calls were made between 24 and 48 hours before the focus groups.

A total of 51 participants attended the six focus groups where each discussion featured between 6 and 10 Wyoming Football fans. While the participants had diverse socio-economic and demographic backgrounds, they all resided fairly close to Laramie – within

2-3 hours away. To ensure feedback was collected from fans residing in more remote locations, Turnkey also conducted in-depth one-on-one phone interviews with several fans living more than 4 hours away from Laramie. The questions covered identical topics as the ones included in the focus group moderator's guide. In early December Turnkey conducted twelve interviews with fans living in Buffalo, Cody, Gillette and Jackson (Wyoming) as well as Colorado Springs, CO and Grand Island, NE.

Finally, on December 17th Turnkey sent an e-mail survey to approximately 5,000 randomly selected STHs and individual game buyers. By January 1st, 2008 the 12-minute questionnaire was completed by 518 season ticket holders and 480 single-game buyers. The sample sizes are reliable within plus or minus 4.4 percentage points and 4.6 percentage points respectively.

2.3. Limitations

Timing. Most primary research phases of the study were completed during the course of the 2007 college football season or immediately following it. Because of the level of emotional involvement and avidity sports fans have for teams they support, one can expect the current on-field performance and any off-field circumstances surrounding the University of Wyoming football program at that time, to have affected more or less the opinion expressed by supporters of the program.

Methodology. The last phase of the project featured conducting an online survey sent via email to Wyoming football season ticket holders and single-game buyers. The selected methodology limits the scope of the survey to respondents with existing valid email addresses in the database of the university's athletic department. Because of this, the opinions expressed in the study may align more closely with the opinions of somewhat younger, more well-off and more tech-savvy fans of Wyoming football than on average.

Rounding. Due to rounding, the sum of percentages in some of the charts and tables in this report does not equal exactly 100.

3. Detailed Findings

3.1. Understanding the Wyoming Football Fans and Their Experience: Attendance Habits

“Cowboy Football is more than Cowboy Football” – a season ticket holder.

The Social Factor. It was easy to identify a common theme during all phases of the primary research – University of Wyoming football games provide an irreplaceable opportunity for social interaction with family, friends and other fans of the program. Although the duration of their stay in Laramie and tailgating habits varies, a key element of attending Wyoming football games is the chance for fans to **socialize** with relatives or acquaintances at the game or at formal and informal gatherings before and/or after the game. For almost all Wyoming football fans, attending a game at War Memorial Stadium is at least an all-day event. Most fans travel to Laramie on game day, while those from more distant locations arrive Friday night. Those traveling on Saturday have an early start in order to have time to walk around the town of Laramie and campus. They might have breakfast with friends or family or stop at the bookstore then walk over to Tailgate Park. Some fans prefer to drive directly to the stadium and start to tailgate.

Family Ties. Many Wyoming football fans are graduates or related to a graduate or someone currently working at the university. According to data collected in the online survey, at least 54% of season ticket holders and 45% of non-season ticket holders are University of Wyoming alumni. Many current Wyoming football fans are sons, daughters, grandchildren, siblings, parents or members of the extended family of other ardent Wyoming football fans. When Wyoming football is in their lineage it forms a meaningful, warm and positive bond, manifested by showing up for many or all of the team's home games and often one or more away games. **Family** plays a prominent role in why Wyoming football is so important to many fans today. It is not just an “excuse” to get together with family – it is often the main reason for people living several hundred miles away from each other to travel to Laramie.

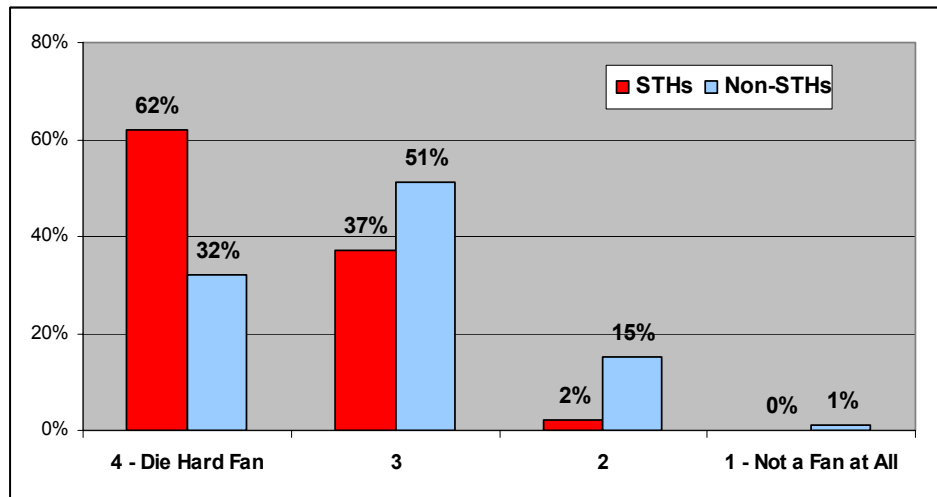
Wyoming Pride. There is a very high level of **Wyoming pride** among fans. Most participants in the focus groups and telephone interviews were very vocal about *Wyoming pride* being the reason why they are fans of the university's football program and why they will continue to be fans. With University of Wyoming being the only four-year institution in the state, supporting its football program means supporting the state of Wyoming – the two overlap completely. And fans feel the best way to demonstrate their support to Wyoming is to physically be at the Wyoming football games. Therefore even when they are unable to

attend a home game fans go to great lengths to ensure someone else utilizes their tickets and they don't go unused.

There is a very strong **sense of camaraderie** among Wyoming football fans. They care deeply for fellow fans and cherish the feeling of sharing the same emotions not only with friends and family, but with everyone else inside War Memorial Stadium.

Affinity for Cowboy Football. Supporters of University of Wyoming football are very avid fans; or as one season-ticket holder put it: "...the stadium could burn down to the ground and we would be there to watch the game". Exhibit 1 below displays results from the online survey where respondents were asked to indicate their affinity for the program on a 4-point scale.

Exhibit 1: To what extent are you a fan of University of Wyoming football?



Not surprisingly, season-ticket holders showed higher level of fan avidity than non-season ticket holders. The former group of fans also attends twice as many games per season as their counterparts - non-season ticket holders.

Exhibit 2: On average, how many University of Wyoming football home games do you attend in a given season?

	STHs	Non-STHs
0 games	0%	2%
1 game	1%	26%
2 games	3%	31%
3 games	7%	21%
4 games	16%	12%
5 games	29%	4%
6 games	44%	5%
On average:	5 games	2.5 games

Season ticket holders are also equally likely to attend games in parties of **2, 3 or 4**, or **5 or more** (Exhibit 3 below). On the other hand, non-season ticket holders are more likely than season ticket holders to attend games in parties of 5 or more. This is especially true for non-season ticket holders in their twenties who probably still have friends attending the university. It is interesting to note that a small number of fans also go to games on their own and either join the parties of others or take advantage of the atmosphere of camaraderie at War Memorial Stadium.

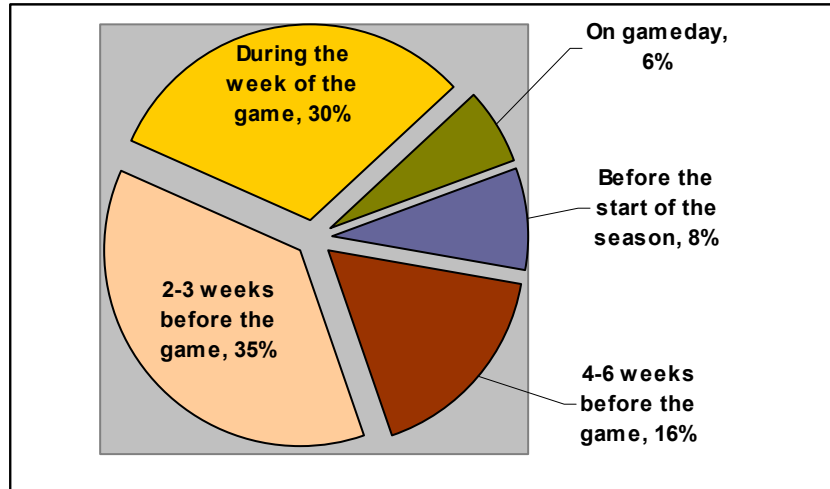
Exhibit 3: Including yourself, how many people are in your party today?

	alone	party of 2	party of 3 or 4	party of 5 or more
STHs	4%	33%	32%	31%
Non-STHs	8%	24%	26%	42%
data from game day intercept survey				

Ticket Purchasing Habits. Roughly seven out of ten (71%) non-season ticket holders purchase their tickets within three weeks of the game they choose to attend, with 6% of non-season ticket holders purchasing their tickets on gameday (see Exhibit 4 below). For these fans who buy their tickets relatively close to the game, not knowing their schedules well-ahead of the game (50%), the fact that tickets are usually available on game day (23%) and concern that they would lose their money if roads are closed on gameday (17%) are the most often cited reasons as to why they wouldn't purchase their tickets earlier. Single-game buyers usually purchase their tickets online from WyomingAthletics.com (71%), at the Box Office (12%) or by calling the athletic department (6%). However, it is worth noting that because of the used methodology, fans who expressed their opinion in the survey tend to be somewhat more tech- and internet-savvy than the average Wyoming Football fan and could have a higher propensity to purchase their tickets online.

REMAINDER OF PAGE LEFT INTENTIONALLY BLANK

Exhibit 4: When do you usually purchase your tickets for University of Wyoming football games? (Non-season ticket holders only)



* 4% of non-season ticket holders indicated they don't pay for their tickets

3.2. Understanding the Wyoming Football Fans and Their Experience: Factors Affecting Attendance

Factors Affecting Decision to Attend. For season ticket holders and for most non-season ticket holders the **current record of the team** has little or no effect on their decision whether or not to attend a game. **Opponent** tends to be a more important factor for both groups of fans, especially for those living far away from Laramie as they prefer to attend games against in-conference rivals and/or high-profile football programs.

According to the opinion of fans interviewed on the phone or participating in the focus groups **weather** becomes a major factor in fans' decision-making process only if it is unsafe to drive to Laramie or the roads are closed.

In the online survey, Turnkey listed several bad weather conditions and asked fans to indicate to what extent each of them would be likely to keep them in home because *A – it is unsafe to drive*, and *B – it would make for poor experience at the game*. Fans had to select a point on a scale of 1-5 where 1 is *not at all likely* and 5 is *extremely likely*. The values in Exhibit 5 and 6 represent the mean score for each condition:

Exhibit 5: Factors which might influence fans to stay at home because it is unsafe to drive: (1 – Not at all Likely, 5 – Extremely Likely)

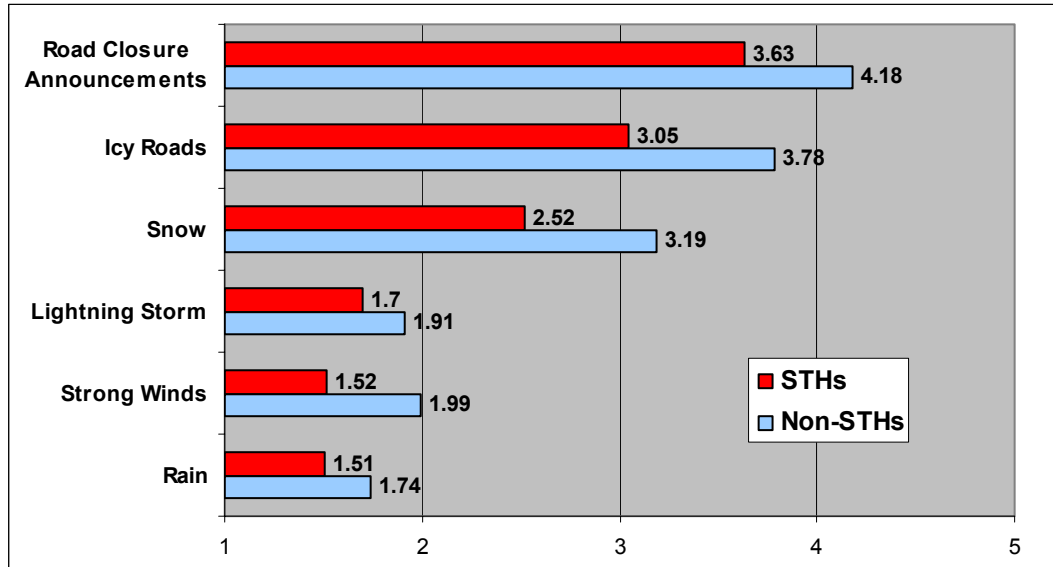
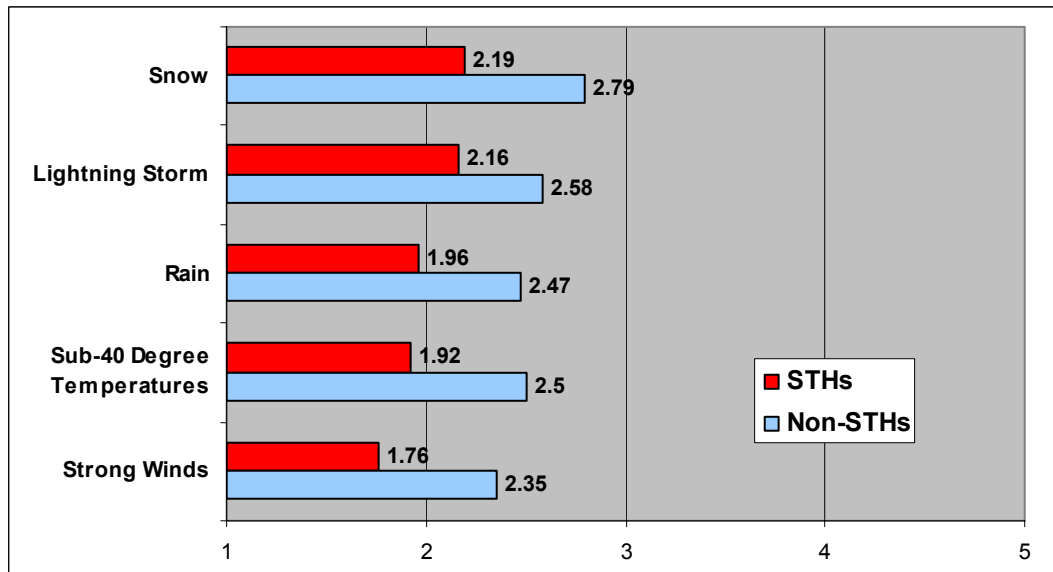


Exhibit 6 : Factors which might influence fans to stay at home because weather will make for a poor experience at the game (1 – Not at all Likely, 5 – Extremely Likely):

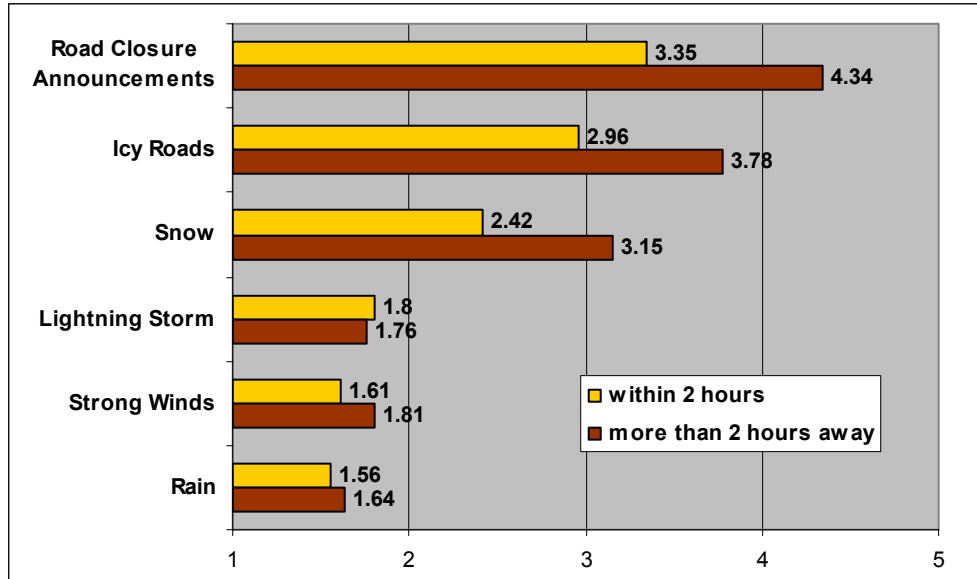


Road closure announcements, icy roads and snow are the biggest deterrents for fans to drive to the game. Forecast for bad weather is more likely to influence non-season ticket holders to stay at home than fans with season tickets for Wyoming football.

In addition, weather becomes more of a factor as the distance from Laramie is increasing - fans who live more than 2 hours away from Laramie are more likely to decide to stay at

home than fans within 2 hours of Laramie if inclement weather conditions are expected (see Exhibit 7 below):

Exhibit 7: Likelihood of fans to opt to stay at home if the following conditions are expected. (1 – not at all likely, 5 – extremely likely)



The majority of fans surveyed online (75% of season ticket holders and 55% of non-season ticket holders) indicated that the **weather forecast on Monday** is a non-factor in their decision whether or not to attend a game on Saturday as it is too early in the week. It is the decisive factor only for 1% and 4% of the two segments of fans respectively. The statement made earlier that weather is more likely to affect non-season ticket holders is supported by the fact that 40% of non-season ticket holders indicated the Monday forecast is somewhat of a factor, after all, compared to just 24% of season ticket holders.

REMAINDER OF PAGE LEFT INTENTIONALLY BLANK

Activities Competing with Wyoming Football. When asked what activities compete with Wyoming football for their time on weekends in the fall, roughly half of all fans answered *family commitments*. For season ticket holders, *youth sports activities* and hunting were a distant second and third option, while roughly one in four non-season ticket holders indicated outdoor recreation activities keep them from attending Wyoming football games. In this, the results from the online survey differed significantly from feedback collected during the focus groups where hunting and youth sports activities were the most often cited reasons for missing games.

Activities	Non-STHs	STHs
Family commitments (other than youth sports)	45%	44%
Outdoor recreation activities	23%	13%
Youth sport activities	19%	17%
Hunting	19%	16%
Distance	12%	4%
Work	8%	11%
High-profile college football on TV	9%	3%

* multiple choice question (sum is greater than 100%)

3.3. Understanding the Wyoming Football Fans and Their Experience: Gameday Experience

Pre-game Experience. Tailgating, including strolling through the Cowboy Joe tent, is often a focal point of the pre-game experience. Participants in the focus groups and fans surveyed online express their frustration when their tailgating activities are curtailed, especially when tailgating is time-constrained, or on few past occasions when local law enforcement cited fans who were simply trying to enjoy themselves before games. Tailgating is as much appreciated for the food and a chance to have a few drinks in a laid-back atmosphere as for allowing tailgaters to meet and bond with other friends and ardent fans. Many participants in the focus groups and telephone interviews felt opening Tailgate Park 90 minutes before game start is inadequate time for enjoying a proper tailgate. Tailgate Park is one of the most important stops of fans preparing to attend the game. The majority of fans make sure to stop by and greet friends – even though they don’t go to see someone in particular they are sure they would see someone they know anytime they visit this location.

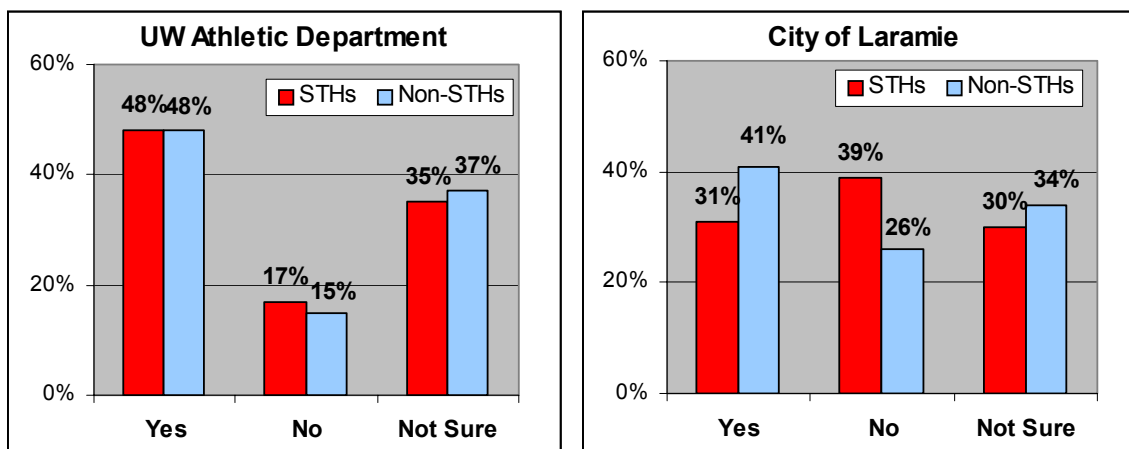
Several fans voiced their concern that the parking lot gets muddy on rainy/snowy days and suggested the school should consider paving it. When comparing their pre-game

experience in Laramie to the pre-game experience at other Division I stadiums, fans unanimously agree that except for the amount of people crowding Laramie, there are no other signs there is a game that day. Wyoming football supporters feel the game day in Laramie is lacking pageantry and strategies for promoting the game and enhancing the festive spirit of fans throughout the city and outside of the stadium. Some examples of such elements witnessed in other locations include marching band processions, signs and flags throughout the host city promoting the game (and even on major highways leading to the city), flyovers, allowing more time for tailgating or even opening Tailgate Park the night before the game for fans with RVs. Some fans suggested pep rallies in Laramie with the coach and or players on Friday night. In addition, fans are eager to see the whole state embrace their only four-year institution and hope to see more buzz leading up to home games even in remote towns. Many Wyoming football fans were impressed and will remember the game when they noticed one state senator in attendance.

The overriding theme expressed in relation to the game day by focus group and telephone interview participants was that the city of Laramie can do a much better job of welcoming Wyoming fans from all corners of the state. As one fan put it – *“This is the University of Wyoming, not the University of Laramie...the city of Laramie has taken the University for granted for too long.”*

The following results from the online survey are supporting the themes and trends regarding game day experience noticed during the qualitative research phase:

Exhibit 8: Do you feel the following are doing all they can to ensure a great experience on game day?



Season ticket holders and non-season ticket holders are in agreement when rating the University’s Athletic Department. However, probably because season ticket holders tend to attend twice as many games per season as non-season ticket holders, they appear to be more critical of the city of Laramie. All in all, there appears to be an opportunity for both the

University of Wyoming's Athletic Department and the city of Laramie to take steps to positively affect fans' gameday experience.

Kickoff Time was another key factor affecting fans' gameday experience as focus group participants unanimously agreed the 12 PM kickoff time does not allow enough time to tailgate properly. The majority of this group of fans indicated 1 PM would be the optimal game start. On the other hand, fans residing several hours away from Laramie, when interviewed on the phone stated they prefer the 12 PM kickoff time. Otherwise they would have to consider spending Saturday night in Laramie in addition to Friday night. The results from the online survey reveal that fans in general are content with the 12 PM kickoff time. The following exhibit compares and contrasts the opinion of fans as they are broken down into sub-segments.

Exhibit 9: What is your opinion of the 12 PM kickoff time for University of Wyoming football home games?

<u>Ticket Plan</u>			<u>Age</u>		
	STHs	Non-STHs	18 - 34	35 - 54	55 +
Too early	30%	23%	41%	27%	17%
Just right	56%	60%	38%	57%	70%
It doesn't matter	13%	18%	21%	16%	13%

There is little difference in the opinion of fans based on their status as season ticket holders. Although ticket plan holders are somewhat more likely than their counterparts to indicate the 12 PM start is "too early", more than half of both groups of fans agree the current start is optimal. The younger the fans, the more likely they are to say the 12 PM kickoff time is "too early". Conversely, with increasing the age of fans they become more likely to be content with the normal game start.

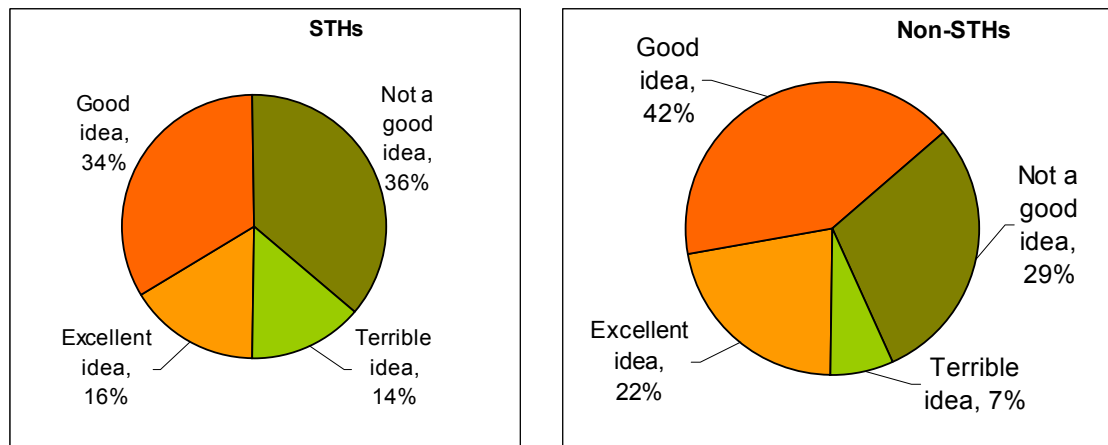
The online survey also tested fans' preference for game starts based on the month during which the games are played. This was done because several focus group participants insisted later game starts made a lot of sense early in the season when weather is more lenient and the longer days allow for a couple of extra hours of light to drive home safely. While for the month of November the 12 PM kickoff time made most sense for the vast majority of fans, approximately 60% of season ticket holders selected 1 PM or a later time as their preferred kickoff time during September (see exhibit 10 below). Roughly 76% of fans 18-34 years old voted for a 1 PM or later game start during September and 62% - during October. Even among fans 55 and older, a game start later than 12 PM was favored by more than half of them (52%) if it took place during September.

Exhibit 10: For you personally, what would be the ideal kickoff time during each of the following months?

Ticket Plan			Age					
September			September					
	STHs	Non-STHs		18-34	35-54	55+		
11:00 AM	1%	1%	11:00 AM	1%	1%	1%		
12:00 PM	39%	42%	12:00 PM	23%	43%	47%		
1:00 PM	38%	29%	1:00 PM	25%	34%	40%		
2:00 PM	17%	17%	2:00 PM	29%	18%	9%		
3:00 PM	1%	3%	3:00 PM	5%	1%	1%		
4:00 PM	1%	2%	4:00 PM	6%	1%	0%		
5:00 PM	1%	2%	5:00 PM	5%	0%	1%		
6:00 PM	2%	3%	6:00 PM	7%	2%	1%		
} 60%			} 76%			} 52%		
October			October					
	STHs	Non-STHs		18-34	35-54	55+		
11:00 AM	2%	3%	11:00 AM	2%	2%	2%		
12:00 PM	55%	57%	12:00 PM	36%	56%	67%		
1:00 PM	37%	27%	1:00 PM	34%	35%	28%		
2:00 PM	6%	9%	2:00 PM	18%	6%	3%		
3:00 PM	1%	2%	3:00 PM	5%	0%	1%		
4:00 PM	0%	0%	4:00 PM	1%	0%	0%		
5:00 PM	0%	0%	5:00 PM	2%	0%	0%		
6:00 PM	0%	0%	6:00 PM	2%	0%	0%		
} 62%			} 62%					

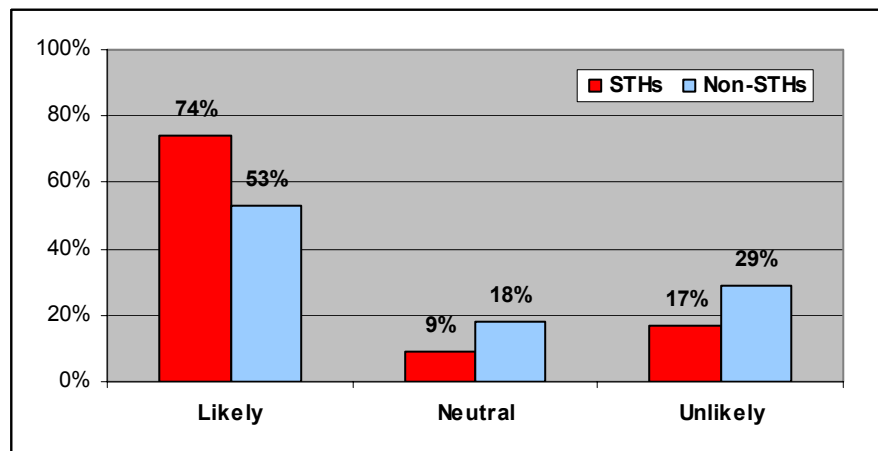
According to several focus group participants, night games promote incredible atmosphere and excitement among fans and scheduling one or two such games in the season would make a great experience at War Memorial Stadium. In general, season ticket holders were split in their opinion whether a night game is a good idea. On the other hand, roughly two out of three non-season ticket holders believed this is a good or excellent idea.

Exhibit 11: What is your opinion of having one or two night games every season?



Even though about half of season ticket holders thought night games are not a good idea, roughly 74% of them admit they will likely attend such game if it were scheduled. Although not as categorical, non-season ticket holders would also attend a night game in large numbers, as 53% of them admit they will likely attend a night game. Finally, a night game in Laramie will be a significant draw for younger Wyoming football fans as roughly 8 out of every 10 fans ages 18 to 34 approve of a night game and are likely to attend one, if it were scheduled. This in itself might present an opportunity to attract a segment of less avid Wyoming Football fans, who would be enticed to attend the game because of the different atmosphere warranted by a game ‘under the lights’.

Exhibit 12: “Personally how likely are you to attend a University of Wyoming night game?”



In-game Experience. Several elements of the in-game experience at War Memorial Stadium deserve immediate attention. Awful service at concession stands, with slow-moving and uncaring staff members and restrooms in dire condition were most often mentioned both by focus group participants and by fans who took the online survey (in an unprompted, open ended question) as amenities that are far below the standard for a Division I football stadium. While fans were dissatisfied mostly with the condition and small capacity of restrooms mainly on the first level of the stadium, the agonizingly slow service from concession-stand workers shuffling inefficiently behind counters was valid for both the lower and upper level concourses. Fans seem to be accepting of the food itself (“typical stadium food”), and their attention is understandably on the terrible, slow customer service. The fact that concessions often ran out of important food and beverage items early in the game (hot drinks on cold days and water on warm days) only add to the perception of bad service at concession stands. These are some of the numerous quotes from season ticket holders complaining about service at concession stands:

“Someone just needs to light a fire behind the people at the counters – they are moving at a snail’s pace.”

“How can they run out of hot chocolate before the 1st quarter is over??”

“I paid money to see a live college football game, not to stand in line for a hot dog for 30 minutes...I don’t get it...most of these items are pre-made and all it takes is to take the money and pass the food.”

Fans would be less upset if the conditions on concourses were better while they waited in line for food or at the restrooms. Similar to what is common for other stadiums and arenas, they would like to see closed-circuit TVs installed on the concourses so waiting patrons don’t miss any of the game action. Many fans insisted something must be done to protect the concourses from the elements and clear the debris and items stockpiled next to where fans are walking (“...it looks more like a storage area for the athletic department than a Division I football stadium”)

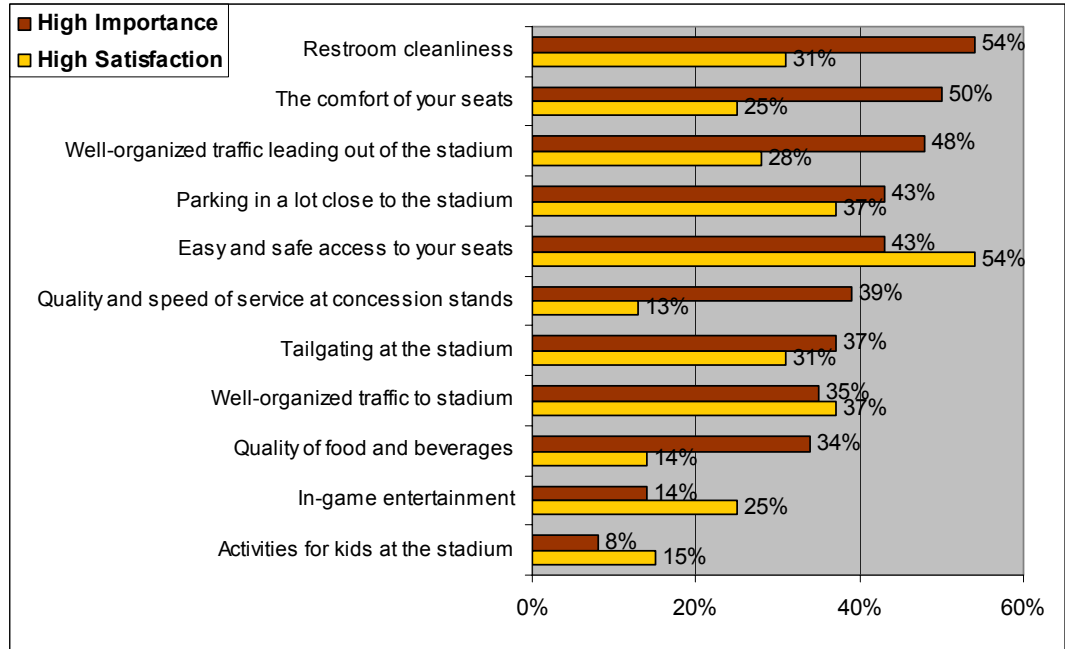
Several other often mentioned improvement suggestions (in addition to a winning team) which came up unprompted included:

- Seats should be wider, have backs;
- Traffic outflow should be more organized and effective;
- Allow alcohol sales in-stadium; many fans give example for Division I stadiums where alcohol sale is permitted;
- As fan base is aging, install hand railings at seating bowl stairs to facilitate safe access to seats;
- Improve access and experience for people with disabilities;
- Install a new scoreboard and audio-system;
- Pave the parking lot;
- Organize the crowd in-stadium to enhance fan experience; put instructions on the video board when to chant and when to make noise, etc.

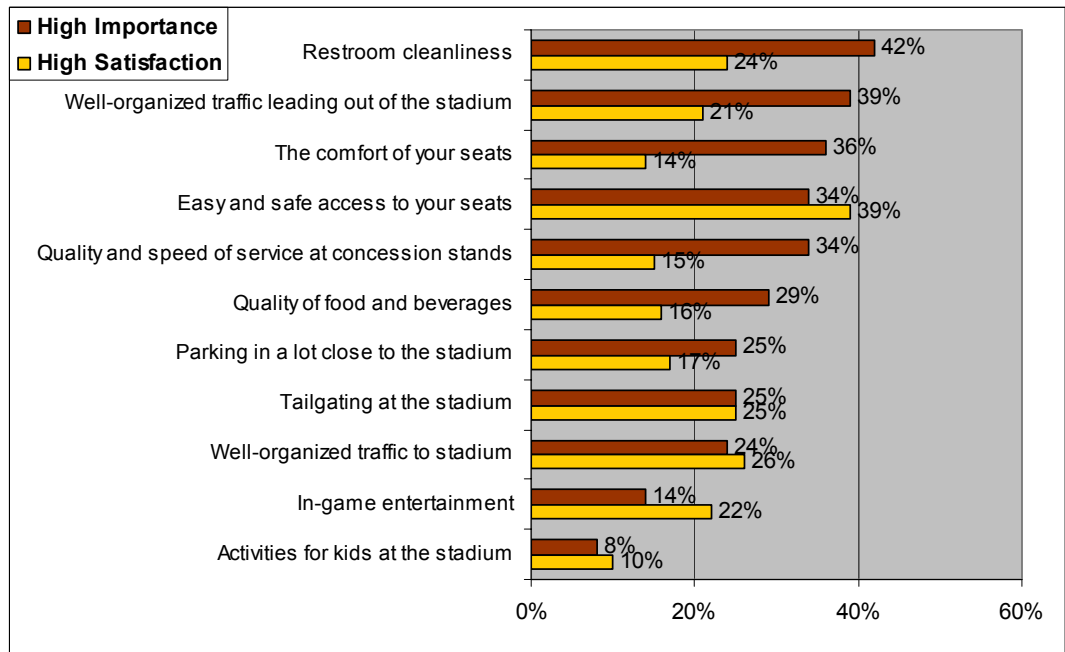
As part of the online survey, Turnkey performed gap analysis by comparing fans’ satisfaction with the main services and amenities offered at the stadium and their level of importance for fans’ enjoyable in-game experience. When rating the different services and amenities fans were asked to use a 7-point scale where 1 is “not at all important” or “not at all satisfied” respectively and 7 is “extremely important” or “extremely satisfied” respectively. A common approach of analyzing the data is to focus on the number of fans who fall into the “top 2” boxes of the scales – 6 and 7. The standard for great performance is to have at least 60% of fans rate their satisfaction with an element a 6 or a 7 on the 7-point scale of satisfaction. At the same time, elements that register 60% or more of fans in the top 2 boxes on the importance scale (again 6 or 7) are elements with major influence

on patron experience and should be considered as immediate priorities for improvement if the respective satisfaction scores are not comparable.

*Exhibit 13: Percentage of **season ticket holders** who selected 6 or 7 on the respective scales of importance and satisfaction.*



*Exhibit 14: “Percentage of **NON-season ticket holders** who selected 6 or 7 on the respective scales of importance and satisfaction.”*

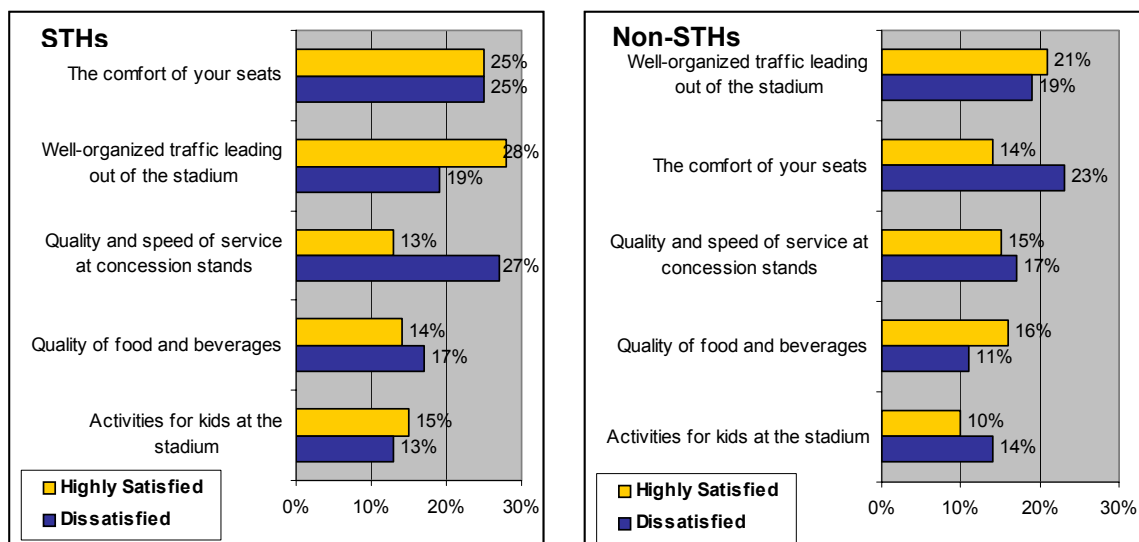


Reviewing the two exhibits above leads to the following four conclusions:

- There aren't any game day experience elements that single-handedly affect patron experience to a great extent;
- Season ticket holders are more likely than non-season ticket holders to identify gameday elements as more important across the board;
- There is a significant gap between the importance and satisfaction ratings for some of the most important factors for patron experience.
- Although mostly valid for elements with somewhat lower importance for gameday experience, the satisfaction ratings matched or surpassed the importance ratings for several services and amenities measured in the survey according to both segments of fans.

Another approach at analyzing fan experience is comparing the number of fans highly satisfied with their experience (6 or 7) with the number of fans that are clearly dissatisfied (1 or 2 on the 7-point scale of satisfaction). Exhibit 15 below pinpoints elements for which the percentage of **dissatisfied** fans (1 or 2 on the 7-point scale) was comparable with or higher than the percentage of **highly satisfied** patrons (6 or 7 on the 7-point scale). Most of the elements are the same underperforming elements from the gap analysis.

*Exhibit 15: "Game day elements where the percentage of **dissatisfied** fans (1 or 2 on the 7-point scale) was comparable with or higher than the percentage of **highly satisfied** patrons (6 or 7 on the 7-point scale)."*



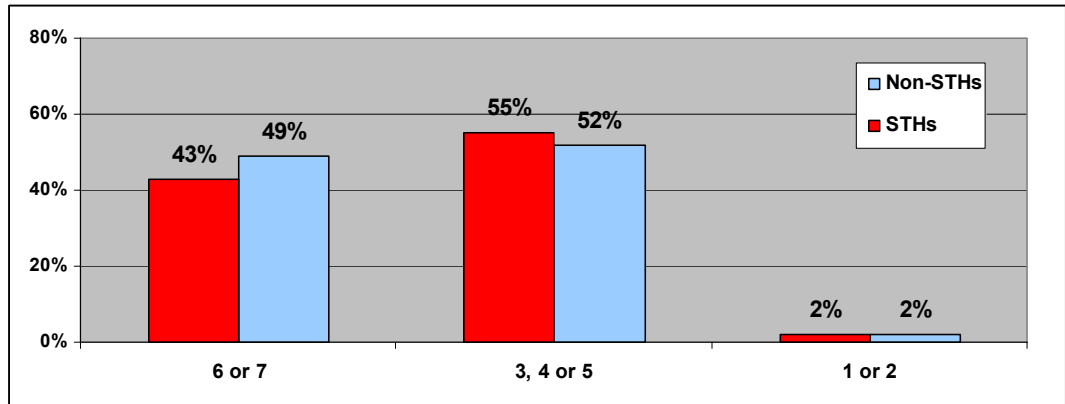
The element which was rated as least important by fans (activities for kids at the stadium) as a whole was among the ones with a significant percent of fans indicating their

dissatisfaction with it. This finding supports the comments of some of the focus group participants who thought there isn't much children can do once the game starts and wanted to see kid-friendly areas and activities at War Memorial Stadium, similar to what pro-sports venues offer. Although this would affect only about two out of three fans (on average 33% of fans **never** attend games with children under 18, see Exhibit 25), the University of Wyoming athletic department should not miss the opportunity for fan development, considering the ageing Wyoming football fan base (see Exhibit 24). In light of everything mentioned in this paragraph it is important to note that in general fans in focus groups pointed out that one of the most appreciated moments on gameday is when children were storming the field after the end of the game and were able to meet and interact with players and coaches. This is a unique experience to Wyoming football games and the athletic department should continue to promote it among existing and potential fans and strive to enhance it.

Comparing fans' satisfaction with individual elements with the overall fan satisfaction figures displayed below, presents a paradox at first glance. The number of season ticket holders and non-season ticket holders highly satisfied with their experience (43% and 49% respectively) might be a little surprising, provided the number of highly satisfied fans with the individual game day elements ranged from 13-15% to 35-37% with one or two exceptions.

The main explanation is that patron satisfaction is equally affected by what happens outside of the stadium and before and after the game. As mentioned earlier in this report, a significant driver of fan attendance is the social interaction with other fans and residents of the state of Wyoming. This explains why overall satisfaction is moderately high, and fans keep coming to games, despite very low satisfaction ratings for individual game day elements.

*Exhibit 16: "How satisfied are you with your **overall experience** of attending University of Wyoming football games? (Use a scale where 1 is "not at all satisfied" and 7 is "extremely satisfied")"*



Priority for Improvements. When provided with the option to identify the top priorities for improvement (stadium upgrades and otherwise), fans voted in the spirit of requesting change and improvements that would affect the greatest number of fellow fans. They would like the University to do whatever it takes to attract better athletes. All other improvements come secondary and in general have equal priority. Season ticket holders, for which tailgating is a key part of the game day experience, would most like to see the parking lot paved. Non-season ticket holders would like to see TV monitors installed on the concourses so fans don't miss any of the game action while waiting in line for food or the restrooms. Not surprisingly, building premium seating sections, which would directly benefit a small percent of all fans, was at the bottom of the list.

*Exhibit 17: "If you had to prioritize, which TWO of the following potential improvements do you personally find **most** important and needed?"*

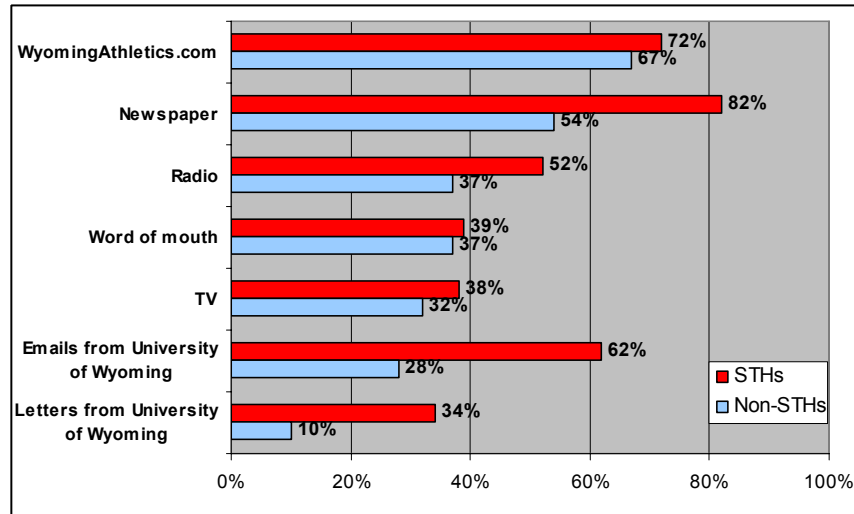
Most Important and Needed Improvements	STHs	Non-STHs
Strategies to attract better athletes	66%	66%
Pave the parking lot	24%	17%
Improve concessions	20%	18%
Renovate restrooms	18%	18%
Install TV monitors on concourses	17%	23%
Build wind-screens on concourses	16%	19%
New scoreboard / videoboard	14%	15%
Build premium seating sections	13%	11%
Install hand-railings at the seating bowl stairs	12%	12%

* fans were asked to select two improvements

Marketing the Program. The general perception among fans participating in the focus groups was that little is done to promote games and events happening on the University of Wyoming campus. This is especially true for areas outside the state limits of Wyoming where the local media does not cover the University of Wyoming in-depth. Participants in the Ft. Collins focus groups indicated promotions of University of Wyoming homecoming

events in the Denver-metro area happened too late to allow for any planning for a trip to Laramie.

Exhibit 18: “Where do you receive information about University of Wyoming football games and related events?” (Select all that apply)



Newspapers and radio seem to be the most effective traditional ways for a one-way communication with Wyoming football stakeholders¹. Based on data from the online survey it is also evident the athletic department is doing a good job utilizing direct marketing strategies to communicate with season ticket holders (emails and letters). The significantly reduced cost of direct marketing, compared to traditional mass media marketing costs should make it a priority for the athletic department to collect the contact information of single-game buyers and keep it up-to-date.

Fans would like to see the athletic department, the city of Laramie and the Laramie Chamber of Commerce to coordinate their efforts in promoting events, attractions, the improved accommodation options in Laramie, etc. Another avenue for promoting games and events is through improving the cross-promotion efforts during University of Wyoming-related sport and other events.

Several older fans reminisced with great nostalgia about organized day-trips via bus for Wyoming football games. They liked the idea of not having to drive and enjoyed socializing with other ardent fans on the bus before and after the game. Colorado residents participating in the Ft. Collins focus groups also found the idea attractive. It is definitely worth for the athletic department to look into the willingness of fans to pay for such chartered bus trips and the viability of organizing them.

¹ Fans who expressed their opinion in the survey tend to be somewhat more tech- and internet-savvy than the average Wyoming Football fan because of the methodology of the study – online survey.

Value for the Money. The general consensus among fans is that Cowboy football tickets provide a great value for what they cost. When compared to the price of tickets for professional sports or other Division I school games, the University of Wyoming football tickets are competitively priced. The perceived high value of the tickets is also due to the fact that fans receive more than access to a college football game when they travel to Laramie on Saturdays in the fall. It is important to note that nowhere during any stage of this research project did a fan express concern that Wyoming football tickets were too expensive.

On the other hand, fans by no means consider the current ticket prices cheap. Especially when fans living a few hours away from Laramie take into consideration the overall cost of attending games – including travel, accommodation and food.

On a separate note, one fan pointed out that if he was to miss one game, the discount of season tickets over the individual game price of tickets did not make it rational to buy the season ticket package. Another fan, who is a season ticket holder from Colorado Springs, when interviewed on the phone indicated that for the 2007 college football season, season tickets for the Air Force Academy football program were a few dollars cheaper than the season tickets for the University of Wyoming football program.

In summary, although fans are unanimous that the University of Wyoming tickets are a good value, they are in general very conscious of the ticket cost and a price increase is likely to cause concern and agitation among fans.

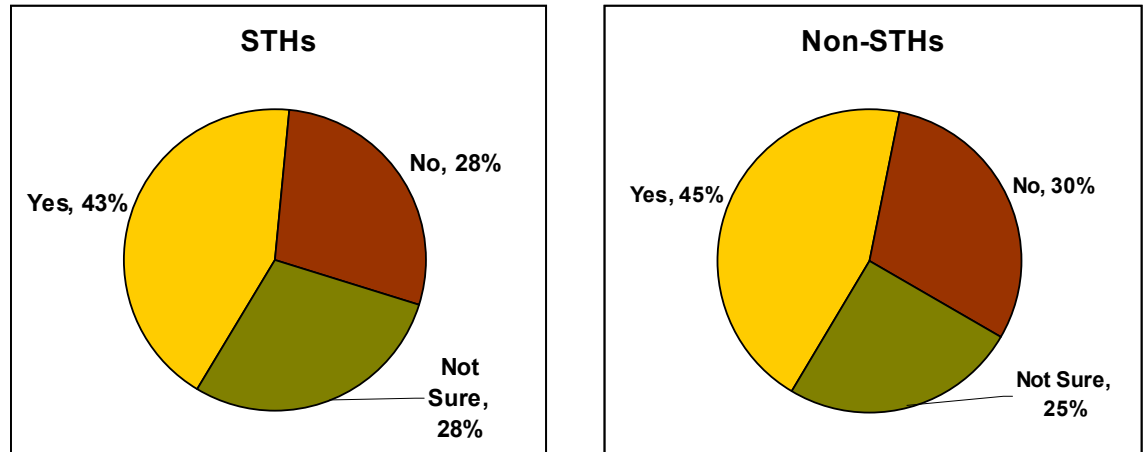
3.4. Premium Seating

Premium Seating – Interest. Discussing the potential addition of premium seating sections at War Memorial Stadium brought about mixed reactions during the qualitative research stage of the study (focus groups and telephone interviews). The predominant opinions expressed were:

A: It would be good for the University of Wyoming as it would raise the profile of the football program and hopefully help attract better talent; it would put it on track with the trend among Division I institutions to provide comparable amenities in their stadiums and arenas to those in professional sports venues. This attitude was also supported to an extent by the results from the online survey where almost half of both season ticket holders and non-season ticket holders agreed this would be beneficial for the Cowboy football program. Approximately one out of three fans disagreed, while the fairly large number of fans who selected “not sure” suggests

they may not have a clear idea of what premium seating entails or how its addition at the stadium would affect the program.

Exhibit 19: “Do you think adding a premium seating section at War Memorial Stadium is good for the football program?”



B: It would be a great option for sponsors, boosters and affluent fans who would be interested in a more upscale experience, which consequently would drive more revenue to the program; as fans are getting older and less tolerant for the weather it might make sense for greater number of them to consider club level seats.

C: It should be considered only after higher-priority improvements at War Memorial Stadium are made that would benefit a greater number of fans.

Focus group participants manifested very strong sentiments for thinking in terms of the greater good for all fans rather than the individual benefit of a small segment of fans. Supporters of Wyoming football were apprehensive that the addition of a premium seating section would create feeling of social class system in the stadium, which would spoil the existing “we’re in this together” feeling. In addition, fans were concerned that these stadium improvements might raise the cost of their tickets and hinder the ability of students to attend games.

Only a handful of fans participating in this stage of the research project expressed definite interest in purchasing club level seats. However, it is important to note that affluent fans who are typically the target market for club and luxury seats at sports venues are unlikely participants in focus groups. Therefore the results of the online survey which has a broader reach of all types of fans and includes a statistically reliable sample size is a better measure of potential fan interest in club seats. The exhibit below provides a snapshot of the interest in premium seating of three segments of fans – season ticket holders as a

whole, season ticket holders with a gross annual household income of \$100,000 or more and non-season ticket holders.

Exhibit 20: “How interested would you be in purchasing premium seats at War Memorial Stadium if the University of Wyoming were to introduce them? (Please use a scale of 1 to 5 where 1 is Not at all Interested and 5 is Extremely Interested)”

	STHs	STHs, \$100K +	Non-STHs
5 Extremely Interested	12%	20%	8%
4	14%	16%	14%
3	22%	24%	19%
2	17%	14%	13%
1 Not at all Interested	34%	27%	46%

The exhibit reveals that at least 12% of all season ticket holders would seriously consider premium seats with the percentage increasing to 20% among season ticket holders with a gross annual household income of at least \$100,000 – the group of fans aligning more closely with the target market for this type of product. With approximately 55% of season ticket holders falling in the category of annual gross household income of \$100,000 or more (see exhibit 24), this initial measure of interest suggests there will not be a shortage of candidates who would consider purchasing premium seating products at War Memorial Stadium.

Premium Seating – Pricing. In terms of pricing for club level seats, fans participating in the focus groups and in the online survey expected to see increases in the range of \$10 to \$25 per ticket or more. The following exhibit focuses on results from the online survey and reports on the price levels considered reasonable by season ticket holders who indicated interest in purchasing club seats and season ticket holders with a gross annual household income of \$100,000 or more, who indicated interest in purchasing club seats. The expected pricing presented below should be reviewed with caution because the level of the required donation to the University of Wyoming was not specified and it would be a factor in what fans consider a reasonable price for club seats in addition to it.

REMAINDER OF PAGE LEFT INTENTIONALLY BLANK

Exhibit 21: “Typically in college sports, premium level seats require a donation to the respective university and tend to cost more than general seats. In your opinion, what would be a reasonable price for premium seats at War Memorial Stadium?”

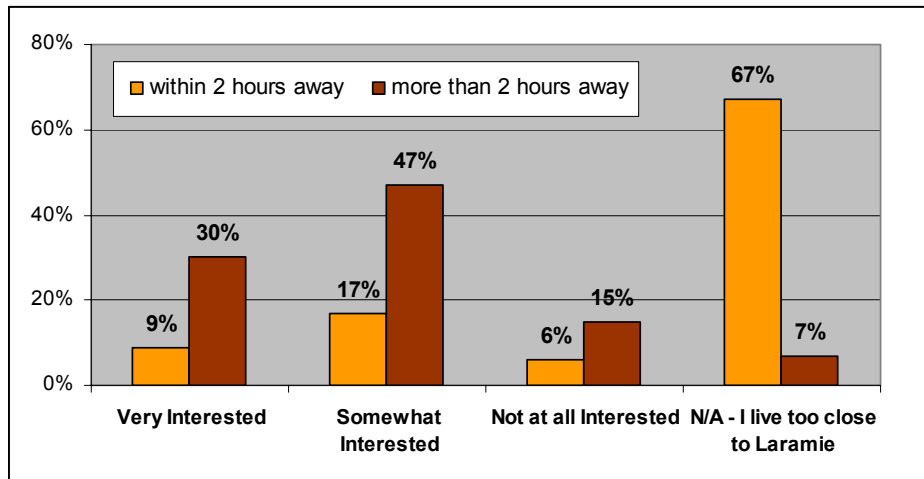
	STHs	STHs, \$100K
up to \$40	15%	10%
\$45	12%	13%
\$50	36%	39%
\$55	5%	6%
\$60 or more	32%	33%
only STHs indicating interest (4 and 5)		

Premium Seating – Amenities: Focus group participants associated premium seating with protection from the weather, more comfortable seats, better food and beverage selection and service amenities like restrooms, dining area, etc. Without any exceptions, fans insisted the club seats should be outside with an option to walk into the enclosed area. The view of the field should not be compromised at all costs. A couple of fans suggested mounting heaters above club seats would be optimal solution for providing comfort while not taking away the experience of being in the game. While the online survey did not go into detail about what fans expected to find and why they would consider premium seating, it provided insight as to why they were unwilling to look into club level seats. As a whole, 41% of season ticket holders indicated *cost* is the main reason and 28% preferred to keep their seats next to friends and acquaintances. This should be taken into consideration when designing the marketing strategy for selling club seats, provided the University of Wyoming moves forward with building the premium section. An option allowing interested fans to move in groups to preserve their seating arrangement among friends could be one potential incentive for “Early Birds”.

3.5. Laramie as a Destination on Football Weekends

Focus group participants and the majority of fans surveyed online find it difficult to consider Laramie as a weekend destination around scheduled Wyoming football games. Most fans find it unreasonable to spend \$100 - \$150 for a comfortable hotel, when they live within a couple of hours and especially because Laramie does not offer much amenities and attractions which warrant a weekend stay. Fans that stay overnight in Laramie are predominantly fans which live several hundred miles away and they are much more interested in making their trip to Laramie a weekend visit if the town offered more amenities or attractions on game day weekend:

Exhibit 22: “If Laramie offered more amenities or attractions on gameday weekend, would you be interested to make your trip to Laramie a weekend visit, rather than just a one-day trip?”

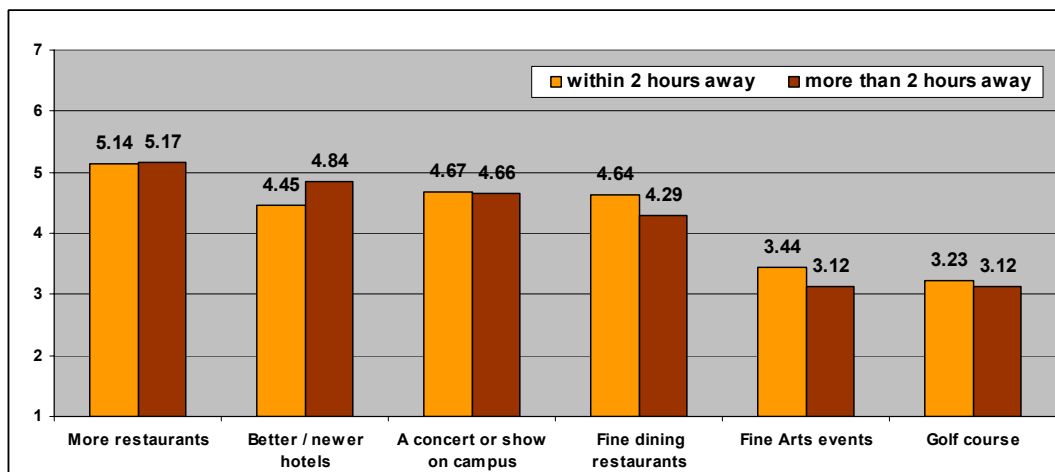


During the focus group discussions most of Laramie’s existing attractions were evaluated (the American Heritage Center, Historic Iverson Mansion, the University of Wyoming’s Planetarium, Art Museum, etc.). The participants were typically aware of most attractions but expressed low interest in them and were not likely to plan an overnight stay in order to visit them. The reasons were that the number of these attractions is limited and fans had already visited them in the past and because visiting most of the attractions does not take much time.

The focal point of a visit to Laramie being the football game itself, attractions unrelated to the game are not considered interesting. Out of the list of potential amenities and attractions tested among focus group participants and fans interviewed via phone, those enhancing visitors’ experience of *attending a Wyoming football game* were considered most appealing: concert events the night before games, new restaurants, new hotels.

Online survey results were in general very consistent:

Exhibit 23: “How appealing do you personally find each of the following potential attractions or amenities in terms of attracting you to Laramie for an extra day stay on a weekend with Wyoming Football game? (Use a scale where 1 is not at all appealing and 7 is extremely appealing)”



** Displayed values are the means for the respective attractions*

Fans acknowledge and welcome the fact that new hotels are already being built and would love to see this trend continue. In terms of specific attractions and related events overnight staying in Laramie on game weekend becomes more of a consideration for fans if they have a special reason such as an alumni reunion, homecoming event, concert or show preferably the night before the football game or a visit with relatives or close friends.

3.6. Demographic Profile of Wyoming Football Fans

According to information collected with the online survey:

The typical Wyoming football season ticket holder is 50 years old, male (80%), lives in Wyoming (85%) within 2 hours drive of Laramie (57%), in a household earning around \$118,000 annually, does not have children under 18 residing at home (72%) and does not attend games with children under 18 (56% - “rarely” or “never”), but attends approximately 5 games per season personally.

The typical Wyoming single game buyer is somewhat younger – around 44, also male (74%), Wyoming resident (69%) with a 60% chance to live within 3 hours drive of Laramie. His annual household income is just under \$100,000, does not have children living at home (59%) and very rarely brings children under 18 to any of the 5 home games he attends over the course of two seasons.

A rather important finding is the fact that Wyoming Football fans tend to be from more well-off households than the average household within 100 miles of Laramie, WY². Because this probably has implications for the school's marketing and sponsorship sales strategies the University athletic department should investigate to what extent this is a result of the data collection methodology.

Exhibit 24: Various demographic information from the online survey administered to Wyoming football fans.

Gender	STHs	Non-STHs
Male	80%	74%
Female	20%	26%

Age	STHs	Non-STHs
18 - 24	0%	6%
25 - 34	10%	22%
35 - 44	19%	18%
45 - 54	25%	33%
55 - 64	30%	16%
65 +	15%	4%
On average	50 y/o	44 y/o

Residence	STHs	Non-STHs
Wyoming	85%	69%
Colorado	12%	18%
Nebraska	1%	3%
Utah	0%	2%
South Dakota	0%	1%
Montana	0%	1%
Other	2%	5%

Children	STHs	Non-STHs
Yes	28%	41%
No	72%	59%
* children under 18 residing at home		

Income	STHs	Non-STHs
Less than \$25,000	1%	4%
\$25,000 - \$49,999	7%	10%
\$50,000 - \$74,999	17%	19%
\$75,000 - \$99,999	20%	24%
\$100,000 - \$149,999	26%	29%
\$150,000 - \$199,999	14%	8%
\$200,000 or more	15%	6%
On average	\$118,624	\$99,915

Games per season	STHs	Non-STHs
0 games	0%	2%
1 game	1%	26%
2 games	3%	31%
3 games	7%	21%
4 games	16%	12%
5 games	29%	4%
6 games	44%	5%
On average:	5 games	2.5 games

Distance	STHs	Non-STHs
Within 2 hrs away	57%	24%
B/n 2 and 3 hrs away	26%	36%
More than 3 hrs away	17%	40%

Exhibit 25: "How often do you attend University of Wyoming games with children under 18?"

	STHs	Non-STHs
Always	17%	21%
Sometimes	27%	26%
Rarely	22%	20%
Never	34%	32%

² The mean gross household income for households within 100 miles of Laramie, WY was \$60,820 (2007 Claritas estimate based on the 2000 census).