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INSIGHT REPORT

Fan Experience Benchmark: U.S. Professional Sports

US CONSUMERS' TV PREFERENCES AND IN-PERSON EXPERIENCES FOR MLB, MLS, NASCAR, NBA, NFL, NHL, PGA, USTA, AND WNBA

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This report was originally published by Temkin Group and was updated to incorporate the Qualtrics XM Institute™ format. There were no substantive changes made to the content.

EXECUTIVE SUMMARY

For seven years in a row, Temkin Group has tracked U.S. consumers' preferences for watching professional sports on TV. This year, we also examined their experience when attending a live sporting event. Here are some highlights from this research:

- NFL is the most dominate sport on TV, but MLB has the highest percentage of fans who attend its games.
- Almost all sports lost TV viewers over the last seven years, with NFL dropping the most. Viewership has declined most dramatically for young adult males.
- NASCAR has the highest level of promoters for its live sporting events, while the NFL has the lowest.
- We evaluated consumer satisfaction across the nine steps that make up a live sporting event journey. Of these steps, parking received the lowest average satisfaction, and ticketing correlated most strongly with fans' likelihood of recommending attending an event to their friends and relatives.
- We include live event scorecards for MLB, MLS, NASCAR, NBA, NFL, NHL, and WNBA.
- Sports teams that want to improve fan experience need to build four competencies: *Purposeful Leadership*, *Compelling Brand Values*, *Employee Engagement*, and *Customer Connectedness*.

PROFESSIONAL SPORTS' TV FANDOM IS ON THE DECLINE

Since 2012, Temkin Group has been surveying U.S. consumers about their preferences for watching eight professional sports on television: baseball (MLB), basketball (NBA), football (NFL), golf (PGA), hockey (NHL), NASCAR, soccer (MLS), and tennis (USTA).[1] This year, we added women's basketball (WNBA) to the survey. When we asked consumers to select the sports that they enjoy watching on TV, we found that:

- **Sports viewership has declined over the last six years.** When we compared the data from this year's study with the results of our 2012 study, we found that six of the eight sports we looked have fewer fans watching today than watched six years ago (see Figures 1 to 3).[2] Only two sports increased their viewership – MLB and the NHL. The

[1] Data comes from Temkin Group's Consumer Benchmark Surveys – online studies of 10,000 U.S. consumers where quotas are set to closely match the U.S. Census in terms of age, income, ethnicity, and geographic region.
[2] To more accurately compare TV fans across years, we normalized the data to correct for changes based on age and gender of the respondents across the years.

last year has seen a particularly steep drop in numbers. Only the NHL increased its TV fan base between 2017 and 2018.

- **NFL, the king of TV, declined the most.** The NFL has consistently been, by a wide margin, the most popular sport on television. This year, for example, 50.8% of consumers say they enjoy watching it, compared to MLB – the next most popular sport – at 37.9%. Over the last six years, however, the percentage of consumers who like watching the NFL on TV has declined by 6.8 percentage-points, the largest drop in viewership across all of the sports.
- **Fewer young males are watching sports**. We examined how consumer preferences for watching sports vary across age and gender (see Figure 4). Of all the different segments we looked at, viewership amongst the youngest male adults (ages 18 to 24) declined the most in six out of the eight sports we evaluated. For the other two sports, NASCAR and MLS, this group dropped by the second largest amount.

EXAMINING THE LIVE SPORTING EXPERIENCE

In addition to analyzing sports viewership on TV, this year we also examined the experience fans have when they attend live sporting events. Here's what we found:

- **MLB has the highest percentage of in-person attendees.** In 2018, 19.8% of consumers went to an MLB game, the highest percentage of any of the sports we tracked (see Figure 5). NFL attendance is second highest, with 15.8% of consumers going to at least one game. Interestingly, more than half of MLB's TV fans say that they've attended a game in-person, which is by far the largest ratio for any sport. The NHL has the second highest ratio, with 44% of its TV fans showing up for one of its games. At the other extreme, only 24% of the consumers who like to watch NASCAR on TV actually make it to see a live race.
- **NASCAR has the most promoters.** We asked the consumers who attended in-person sporting events about their experiences and found that NASCAR has the most avid fans.[3] Fifty-seven percent of consumers who went to a NASCAR event are "promoters," meaning they are highly likely to recommend attending a NASCAR race to their friends and relatives (see Figure 6). Of all the sports we looked at, the NFL has the lowest percentage of "promoters" with 49%.
- **Parking is the biggest problem**. We asked consumers to rate their experiences across nine stages in a sporting event journey. Unsurprisingly, "watch the game" earned the highest satisfaction rate with 79%. Meanwhile, only 60% of attendees felt satisfied with their parking experience.
- **Ticketing drives promoters.** How satisfied fans feel throughout their journey is highly correlated to whether or not they become "promoters" (see Figure 7). For five of the seven sports we looked at, "selecting and purchasing your tickets" had the strongest correlation to recommending the experience to friends and family. Of these five sports, the WNBA has the highest correlation between ticketing and being a "promoter." The only sports where ticketing not the most strongly correlated to

[3] In this study, we did not include consumers who attended in-person PGA and tennis matches.

recommending are the NHL (where "purchasing a souvenir" is most correlated), MLB (where "parking" is most correlated), and the NBA (where "watching the game" is tied with ticketing).

THE BEST AND WORST OF IN-PERSON SPORTING EVENTS

We also examined how satisfied fans of seven sports felt with seven different steps in their in-person journey (see Figures 8 and 9). H ere are the results:

- **Ticketing:** MLS delivers the highest levels of satisfaction (78%), while the NFL delivers the lowest (69%).
- **Parking:** WNBA delivers the highest levels of satisfaction (72%), while the MLB and NFL deliver the lowest (53%).
- **Entering the event:** MLS delivers the highest levels of satisfaction (71%), while the NFL delivers the lowest (64%).
- **Finding seats:** MLB delivers the highest levels of satisfaction (75%), while the NFL delivers the lowest (70%).
- **Using the bathroom:** WNBA delivers the highest levels of satisfaction (71%), while the NFL delivers the lowest (60%).
- **Purchasing food:** WNBA delivers the highest levels of satisfaction (72%), while the NFL delivers the lowest (60%).
- **Purchasing souvenirs:** WNBA delivers the highest levels of satisfaction (74%), while the NFL delivers the lowest (61%).
- **Watching the event:** The NHL and MLB deliver the highest levels of satisfaction (83%), while the WNBA delivers the lowest (76%).
- **Leaving the event:** WNBA delivers the highest levels of satisfaction (74%), while the NFL delivers the lowest (61%).

In-Person Scorecards for MLB, MLS, NASCAR, NBA, NFL, NHL, and WNBA

We developed an overview of results for each of the sports. Rather than describe them in more detail here, we recommend that you check out the graphics accompanying this report (see Figures 10 to 16).

THE PATH TO FAN EXPERIENCE EXCELLENCE

Although any type of team can improve narrow segments of its fan experience, creating lasting differentiation requires more than just strong ambitions and superficial changes. Our research shows that long-term success requires organizations to gain customer experience maturity by building and sustaining four customer experience competencies (see Figure 17):[4]

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[4] See the Temkin Group report, The Four Customer Experience Core Competencies (January 2013).

- **Purposeful Leadership:** Leaders operate consistently with a clear set of values.
- **Employee Engagement:** Employees are aligned with the goals of the organization.
- **Compelling Brand Values**: Brand promises drive how the organization treats customers.
- **Customer Connectedness**: Customer insights are infused across the organization.

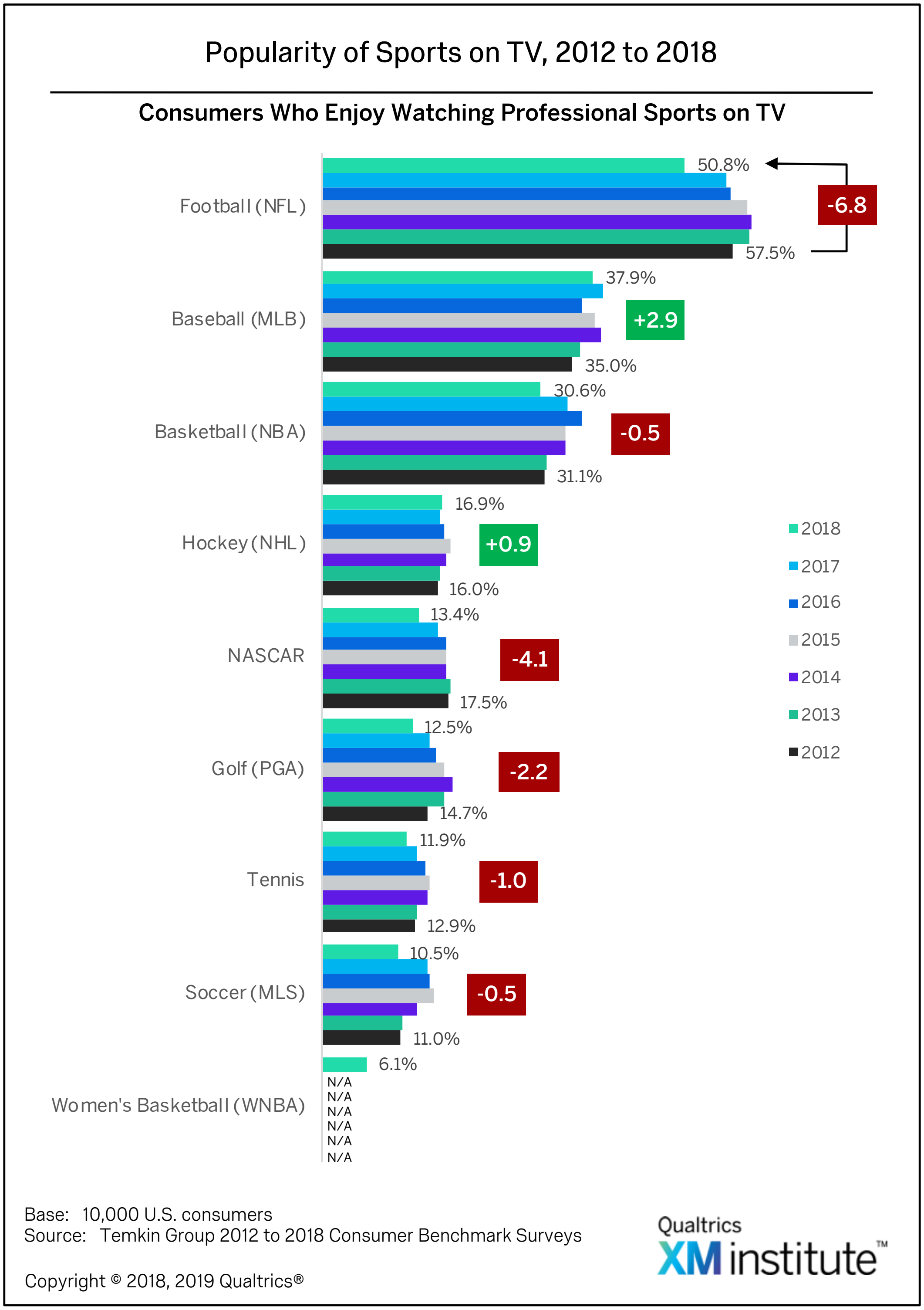
Popularity of Sports on TV, 2012 to 2018
Consumers Who Enjoy Watching Professional Sports on TV
Football (NFL)
50.8%
57.5%
-6.8
Baseball (MLB)
37.9%
35.0%
+2.9
Basketball (NBA)
30.6%
31.1%
-0.5
Hockey (NHL)
16.9%
16.0%
+0.9
NASCAR
13.4%
17.5%
-4.1
Golf (PGA)
12.5%
14.7%
-2.2
Tennis
11.9%
12.9%
-1.0
Soccer (MLS)
10.5%
11.0%
-0.5
Women's Basketball (WNBA)
6.1%
N/A
N/A
N/A
N/A
N/A
N/A
2018
2017
2016
2015
2014
2013
2012
Base: 10,000 U.S. consumers
Source: Temkin Group 2012 to 2018 Consumer Benchmark Surveys
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Figure 1

Popularity of Sports on TV, 2012 to 2018

Percentage of Consumers Who Enjoy Watching Professional Sports on TV

	2012	2013	2014	2015	2016	2017	2018
Baseball (MLB)	35.0%	36.1%	38.9%	38.0%	36.4%	39.2%	37.9%
Basketball (NBA)	31.1%	31.4%	34.1%	34.0%	36.3%	34.4%	30.6%
Football (NFL)	57.5%	59.9%	60.1%	59.4%	57.2%	56.6%	50.8%
Golf (PGA)	14.7%	17.1%	18.2%	17.0%	15.8%	15.0%	12.5%
Hockey (NHL)	16.0%	16.3%	17.3%	18.0%	16.9%	16.4%	16.9%
NASCAR	17.5%	18.0%	17.2%	17.2%	17.3%	16.3%	13.4%
Soccer (MLS)	11.0%	11.1%	13.3%	15.6%	15.1%	14.6%	10.5%
Tennis	12.9%	13.1%	14.6%	15.1%	14.4%	13.2%	11.9%
Women's Basketball (WNBA)	N/A	N/A	N/A	N/A	N/A	N/A	6.1%

Base: 10,000 U.S. consumers
Source: Temkin Group 2012 to 2018 Consumer Benchmark Surveys

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Figure 2

Popularity of Sports on TV By Age and Gender, 2018

Percentage of Consumers Who Enjoy Watching Professional Sports on TV

	MLB	NBA	NFL	PGA	NHL	NASCAR	MLS	Tennis	WNBA
18 to 24 male	26%	40%	40%	6%	12%	8%	14%	7%	5%
18 to 24 female	19%	26%	36%	3%	11%	6%	12%	8%	6%
25 to 34 male	53%	57%	56%	15%	24%	16%	23%	15%	10%
25 to 34 female	25%	29%	45%	3%	15%	8%	12%	11%	7%
35 to 44 male	51%	49%	62%	15%	24%	16%	17%	14%	8%
35 to 44 female	24%	25%	42%	3%	10%	10%	7%	12%	6%
45 to 54 male	48%	32%	63%	15%	25%	17%	10%	13%	4%
45 to 54 female	23%	20%	42%	4%	11%	12%	6%	11%	5%
55 to 64 male	53%	30%	64%	21%	26%	21%	11%	14%	6%
55 to 64 female	30%	20%	42%	6%	12%	12%	5%	12%	6%
65 to 74 male	51%	27%	61%	22%	18%	20%	8%	13%	7%
65 to 74 female	30%	15%	36%	11%	9%	13%	4%	12%	4%
75 or older male	51%	27%	62%	29%	18%	17%	7%	13%	6%
75 or older female	27%	16%	34%	11%	7%	4%	3%	10%	4%

Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey

Figure 3

Popularity of Sports on TV By Age and Gender, 2012 to 2018

Changes in Consumers Who Enjoy Watching Professional Sports on TV Between 2012 and 2018 (%-points)

	MLB	NBA	NFL	PGA	NHL	NASCAR	MLS	Tennis
18 to 24 male	-19.9	-10.8	-15.1	-7.8	-3.3	-6.4	-12.3	-5.4
18 to 24 female	+2.2	+1.9	-6.5	-4.7	+0.8	-3.3	-6.7	-0.9
25 to 34 male	-5.3	-3.4	-2.3	-3.6	+0.4	-6.5	-12.9	-2.6
26 to 34 female	+2.4	-1.0	-2.3	-0.4	-2.2	-6.2	-5.5	-0.3
35 to 44 male	+3.6	-3.0	-7.8	-1.4	+3.0	+0.1	+1.7	+1.8
36 to 44 female	+0.7	-1.8	-8.0	-4.2	+0.9	-1.3	+0.1	+2.2
45 to 54 male	0.0	0.0	-10.6	+2.8	+4.2	-4.5	+1.2	+3.6
46 to 54 female	-1.9	-8.0	-2.7	-0.9	-2.4	-1.8	-5.4	-6.6
55 to 64 male	+1.0	-8.8	-1.9	-2.2	+3.5	+1.8	-3.2	-4.0
56 to 64 female	-3.4	-3.7	-2.8	-3.8	-2.1	-1.9	-5.0	-1.3
65 to 74 male	-1.0	-1.0	-6.4	-2.1	-1.5	-2.4	-0.8	-1.8
66 to 74 female	+3.5	-1.8	-4.6	-2.3	+3.2	-1.6	-1.8	-1.7
75 or older male	+3.8	-3.7	-6.3	+1.0	+1.1	+0.7	-1.2	-1.0
75 or older female	-1.8	-6.9	-6.3	-5.8	+0.9	-5.3	-3.3	-1.7

Base: 10,000 U.S. consumers
Source: Temkin Group 2012 to 2018 Consumer Benchmark Surveys

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Figure 4

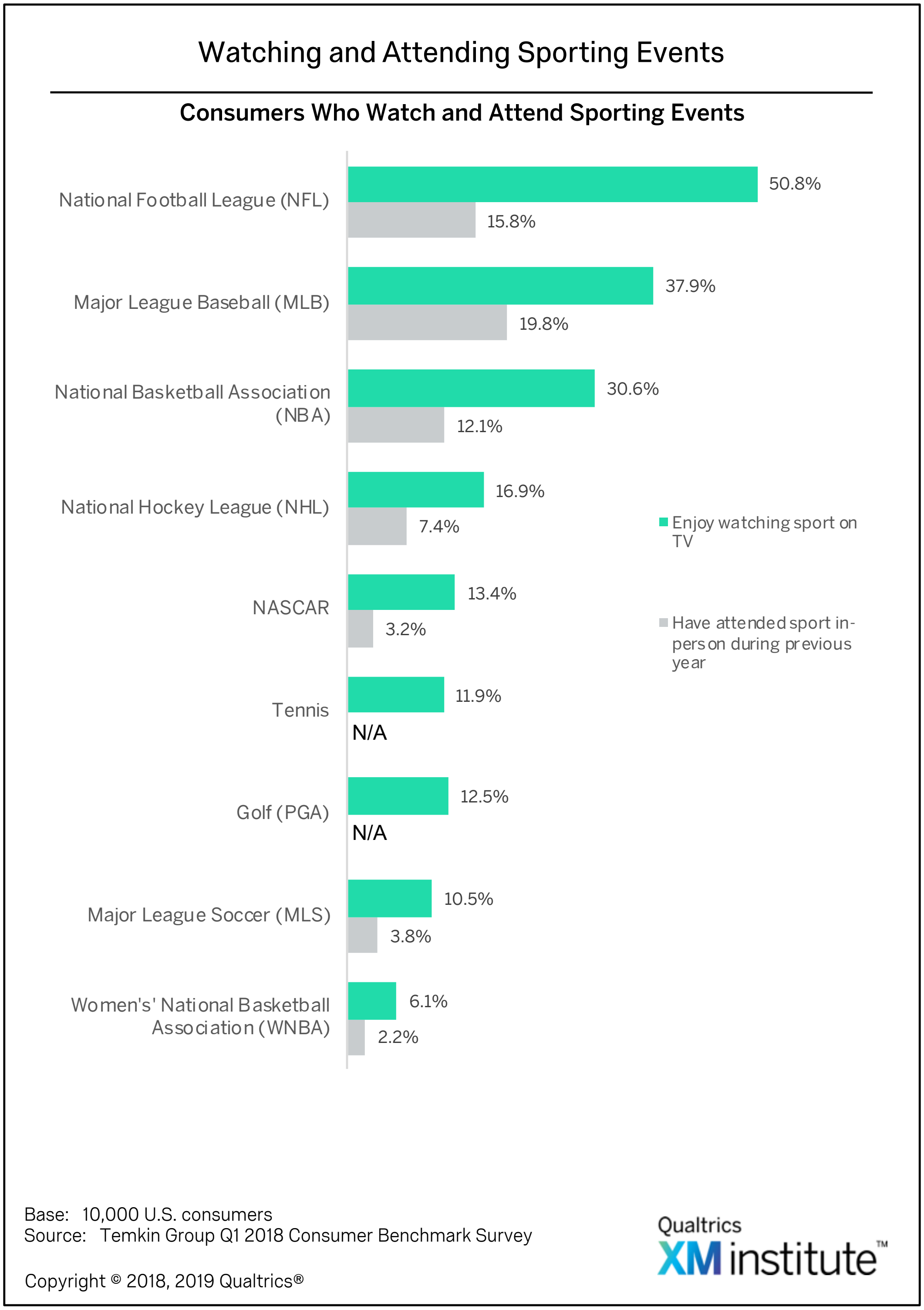
Watching and Attending Sporting Events
Consumers Who Watch and Attend Sporting Events
National Football League (NFL)
50.8%
15.8%
Major League Baseball (MLB)
37.9%
19.8%
National Basketball Association (NBA)
30.6%
12.1%
National Hockey League (NHL)
16.9%
7.4%
NASCAR
13.4%
3.2%
Tennis
11.9%
N/A
Golf (PGA)
12.5%
N/A
Major League Soccer (MLS)
10.5%
3.8%
Women's' National Basketball Association (WNBA)
6.1%
2.2%
Enjoy watching sport on TV
Have attended sport in-person during previous year
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 5

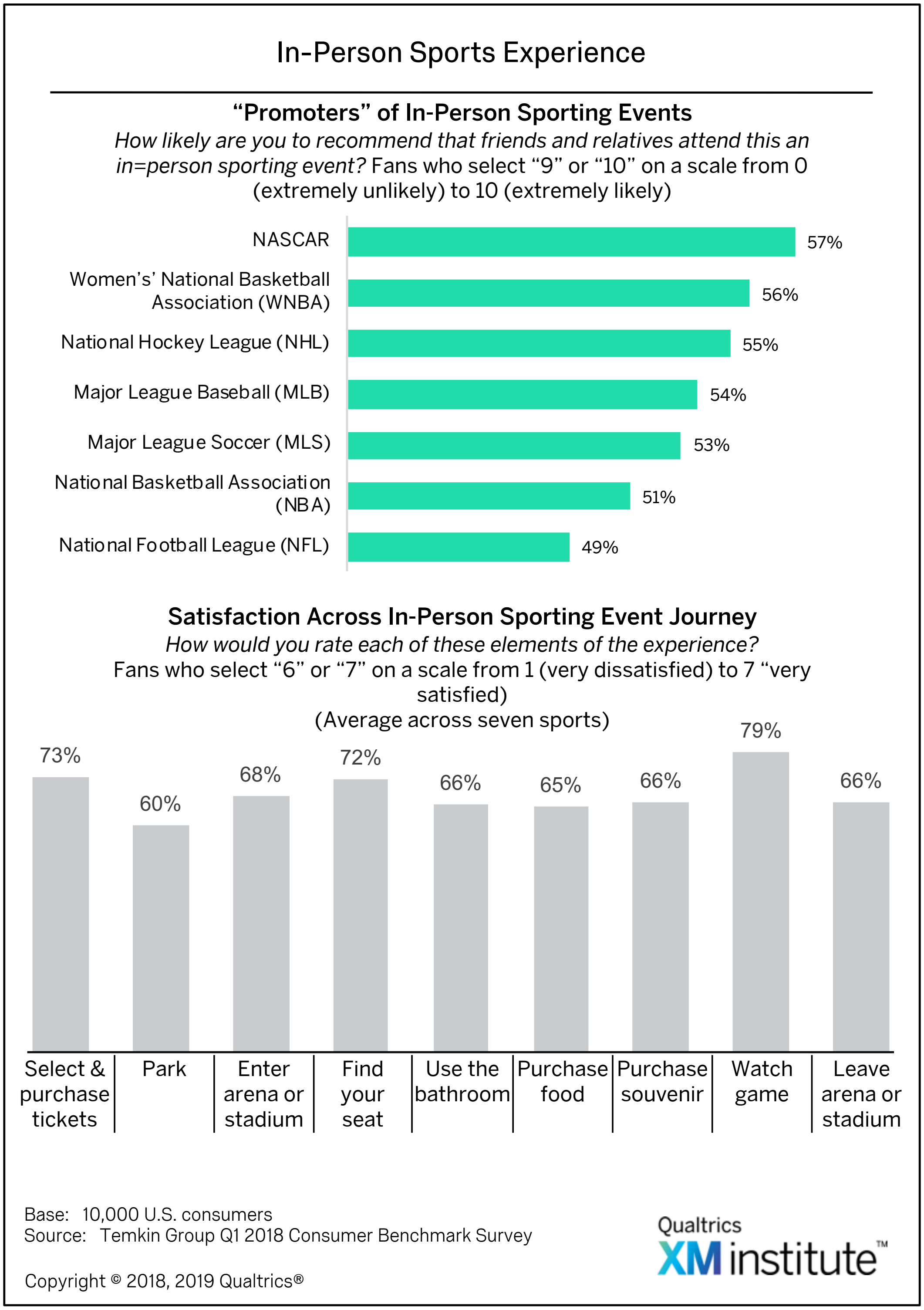
In-Person Sports Experience
"Promoters" of In-Person Sporting Events
How likely are you to recommend that friends and relatives attend this an in=person sporting event? Fans who select "9" or "10" on a scale from 0 (extremely unlikely) to 10 (extremely likely)
NASCAR 57%
Women's' National Basketball Association (WNBA) 56%
National Hockey League (NHL) 55%
Major League Baseball (MLB) 54%
Major League Soccer (MLS) 53%
National Basketball Association (NBA) 51%
National Football League (NFL) 49%
Satisfaction Across In-Person Sporting Event Journey
How would you rate each of these elements of the experience?
Fans who select "6" or "7" on a scale from 1 (very dissatisfied) to 7 "very satisfied)
(Average across seven sports)
Select & purchase tickets 73%
Park 60%
Enter arena or stadium 68%
Find your seat 72%
Use the bathroom 66%
Purchase food 65%
Purchase souvenir 66%
Watch game 79%
Leave arena or stadium 66%
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 6

Importance Of Stadium Journey Steps

Correlation Between "Promoters" And Satisfaction

	NHL	MLB	MLS	WNBA	NBA	NASCAR	NFL
Selecting & purchasing your tickets	48%	46%	61%	76%	62%	62%	69%
Parking	44%	56%	46%	56%	44%	55%	55%
Entering into the arena/stadium	53%	54%	55%	61%	58%	60%	65%
Finding your seat	55%	45%	53%	54%	55%	51%	64%
Using the bathroom	56%	50%	49%	57%	47%	55%	63%
Purchasing food	56%	50%	47%	67%	44%	56%	56%
Purchasing a souvenir	57%	53%	49%	68%	43%	52%	63%
Watching the game	54%	50%	52%	69%	62%	53%	65%
Leaving the arena/stadium	55%	49%	50%	57%	52%	50%	52%

Degree of Correlation

Low | Medium | Medium-High | High

Highest for Sport

Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey

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Figure 7

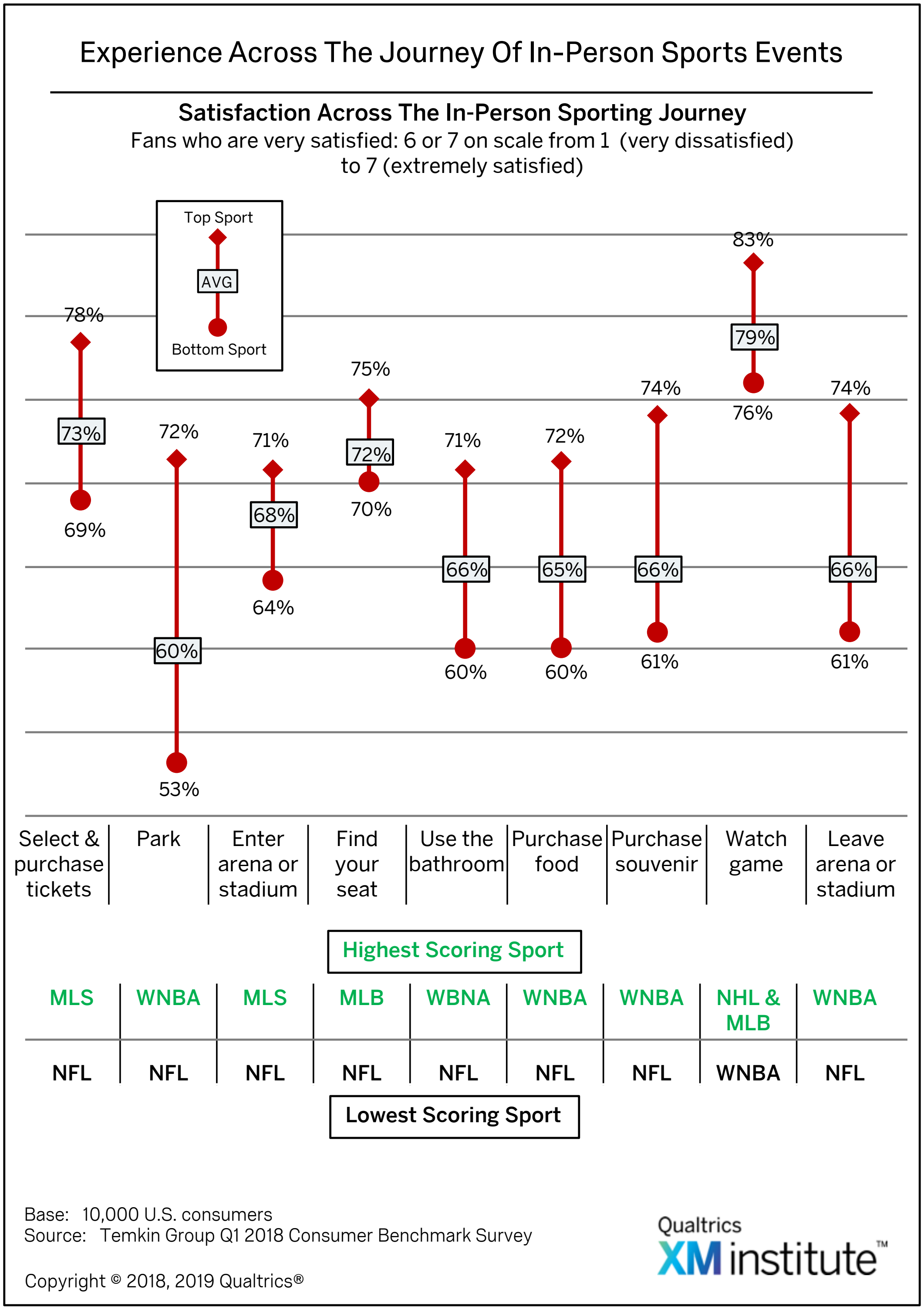
Experience Across The Journey Of In-Person Sports Events
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (extremely satisfied)
Top Sport
AVG
Bottom Sport
78%
73%
69%
72%
60%
53%
71%
68%
64%
75%
72%
70%
71%
66%
60%
72%
65%
60%
74%
66%
61%
83%
79%
76%
74%
66%
61%
Select & purchase tickets
Park
Enter arena or stadium
Find your seat
Use the bathroom
Purchase food
Purchase souvenir
Watch game
Leave arena or stadium
Highest Scoring Sport
MLS
WNBA
MLS
MLB
WBNA
WNBA
WNBA
NHL & MLB
WNBA
NFL
NFL
NFL
NFL
NFL
NFL
NFL
WNBA
NFL
Lowest Scoring Sport
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 8

Satisfaction Levels Across The Fan Journey

Consumers Who Are Very Satisfied With Their In-Person Sports Experience

Step in Journey	NHL	MLB	MLS	WNBA	NBA	NASCAR	NFL
Selecting & purchasing your tickets	73%	72%	**78%**	72%	72%	74%	69%
Parking	60%	53%	65%	**72%**	60%	57%	53%
Entering into the arena or stadium	70%	69%	**71%**	69%	68%	65%	64%
Finding your seat	74%	**75%**	74%	71%	72%	71%	70%
Using the bathroom	66%	64%	67%	**71%**	65%	65%	60%
Purchasing food	65%	61%	67%	**72%**	63%	67%	60%
Purchasing a souvenir	64%	62%	68%	**74%**	67%	68%	61%
Watching the game	**83%**	**83%**	79%	76%	78%	77%	79%
Leaving the arena or stadium	66%	65%	67%	**74%**	67%	62%	61%

Sport with highest satisfaction (highlighted in bold)

Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey

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Figure 9

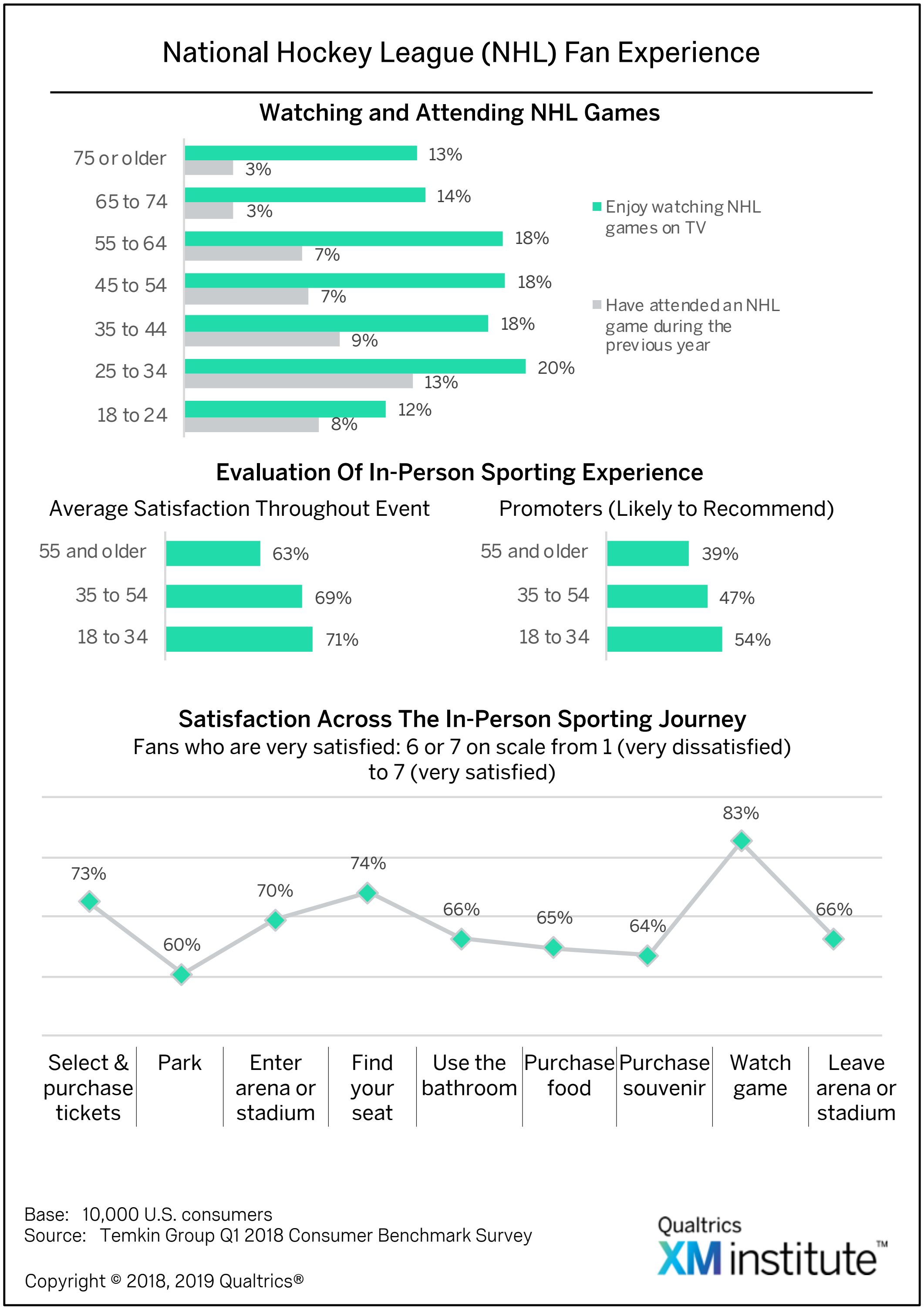
National Hockey League (NHL) Fan Experience
Watching and Attending NHL Games
75 or older 13% 3%
65 to 74 14% 3%
55 to 64 18% 7%
45 to 54 18% 7%
35 to 44 18% 9%
25 to 34 20% 13%
18 to 24 12% 8%
Enjoy watching NHL games on TV
Have attended an NHL game during the previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older 63%
35 to 54 69%
18 to 34 71%
Promoters (Likely to Recommend)
55 and older 39%
35 to 54 47%
18 to 34 54%
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
Select & purchase tickets 73%
Park 60%
Enter arena or stadium 70%
Find your seat 74%
Use the bathroom 66%
Purchase food 65%
Purchase souvenir 64%
Watch game 83%
Leave arena or stadium 66%
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 10

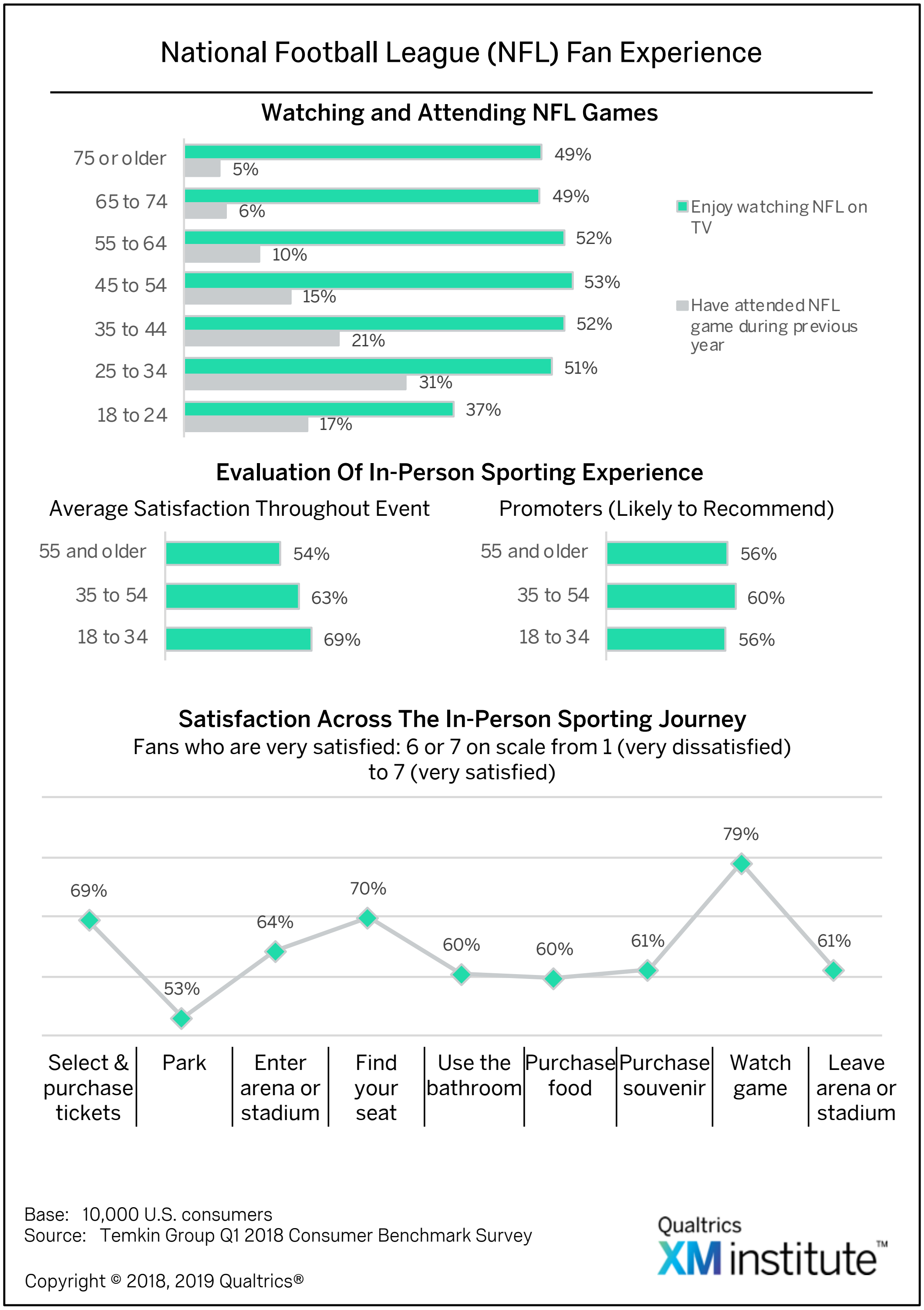
National Football League (NFL) Fan Experience
Watching and Attending NFL Games
75 or older 49% 5%
65 to 74 49% 6%
55 to 64 52% 10%
45 to 54 53% 15%
35 to 44 52% 21%
25 to 34 51% 31%
18 to 24 37% 17%
Enjoy watching NFL on TV
Have attended NFL game during previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older 54%
35 to 54 63%
18 to 34 69%
Promoters (Likely to Recommend)
55 and older 56%
35 to 54 60%
18 to 34 56%
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
Select & purchase tickets 69%
Park 53%
Enter arena or stadium 64%
Find your seat 70%
Use the bathroom 60%
Purchase food 60%
Purchase souvenir 61%
Watch game 79%
Leave arena or stadium 61%
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 11

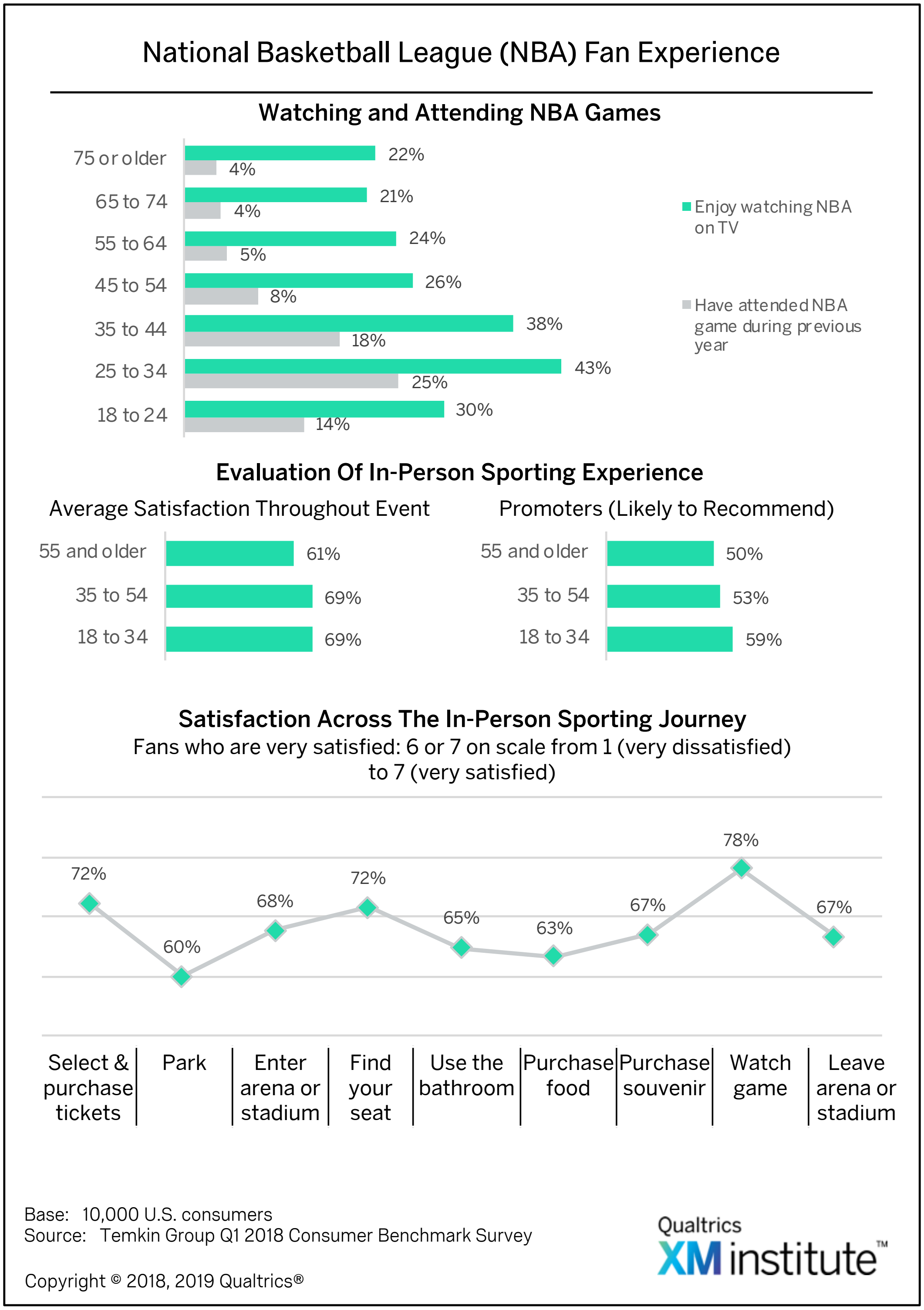
National Basketball League (NBA) Fan Experience
Watching and Attending NBA Games
75 or older
22%
4%
65 to 74
21%
4%
55 to 64
24%
5%
45 to 54
26%
8%
35 to 44
38%
18%
25 to 34
43%
25%
18 to 24
30%
14%
Enjoy watching NBA on TV
Have attended NBA game during previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older
61%
35 to 54
69%
18 to 34
69%
Promoters (Likely to Recommend)
55 and older
50%
35 to 54
53%
18 to 34
59%
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
72%
60%
68%
72%
65%
63%
67%
78%
67%
Select & purchase tickets
Park
Enter arena or stadium
Find your seat
Use the bathroom
Purchase food
Purchase souvenir
Watch game
Leave arena or stadium
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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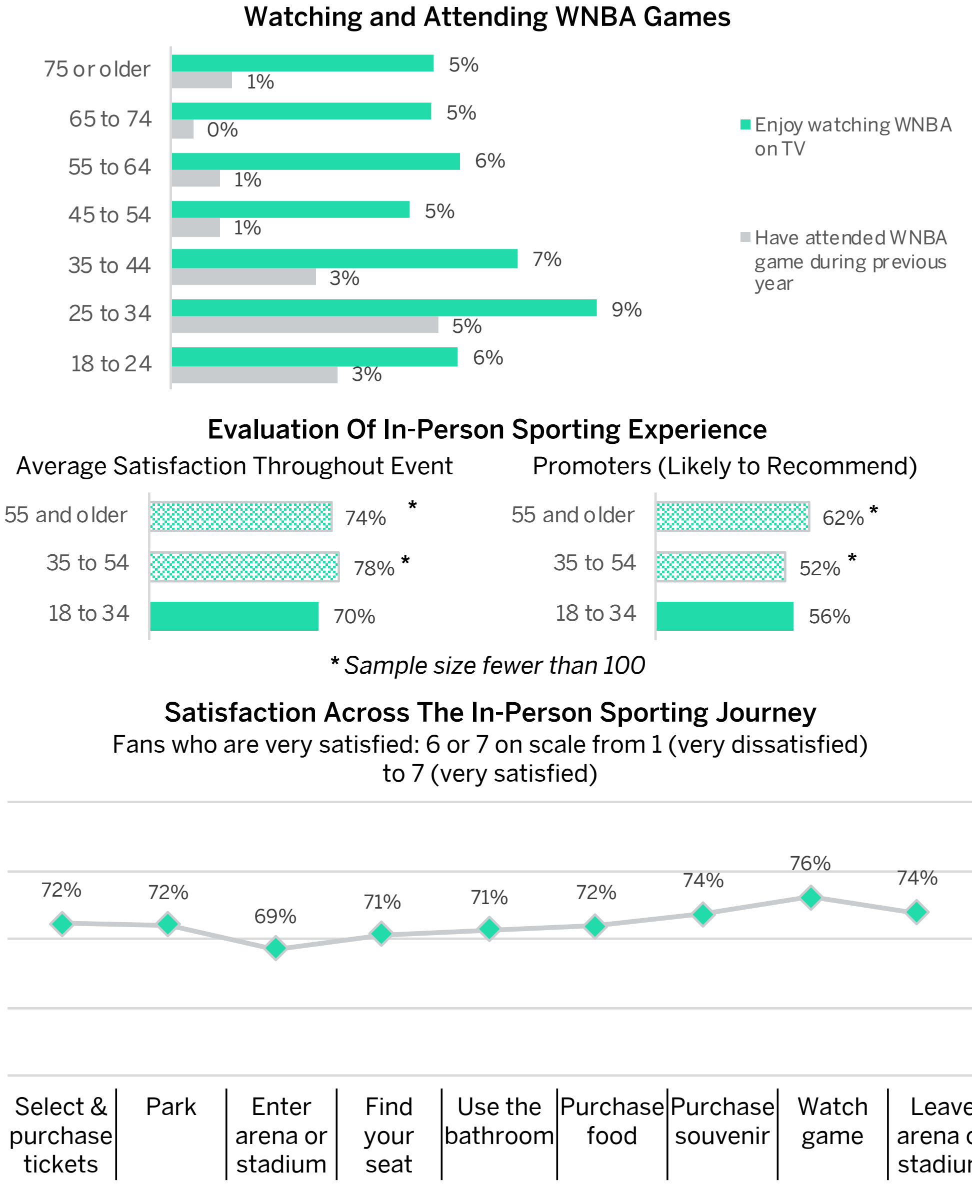
Figure 12

Women's National Basketball League (WNBA) Fan Experience



Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey

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Figure 13

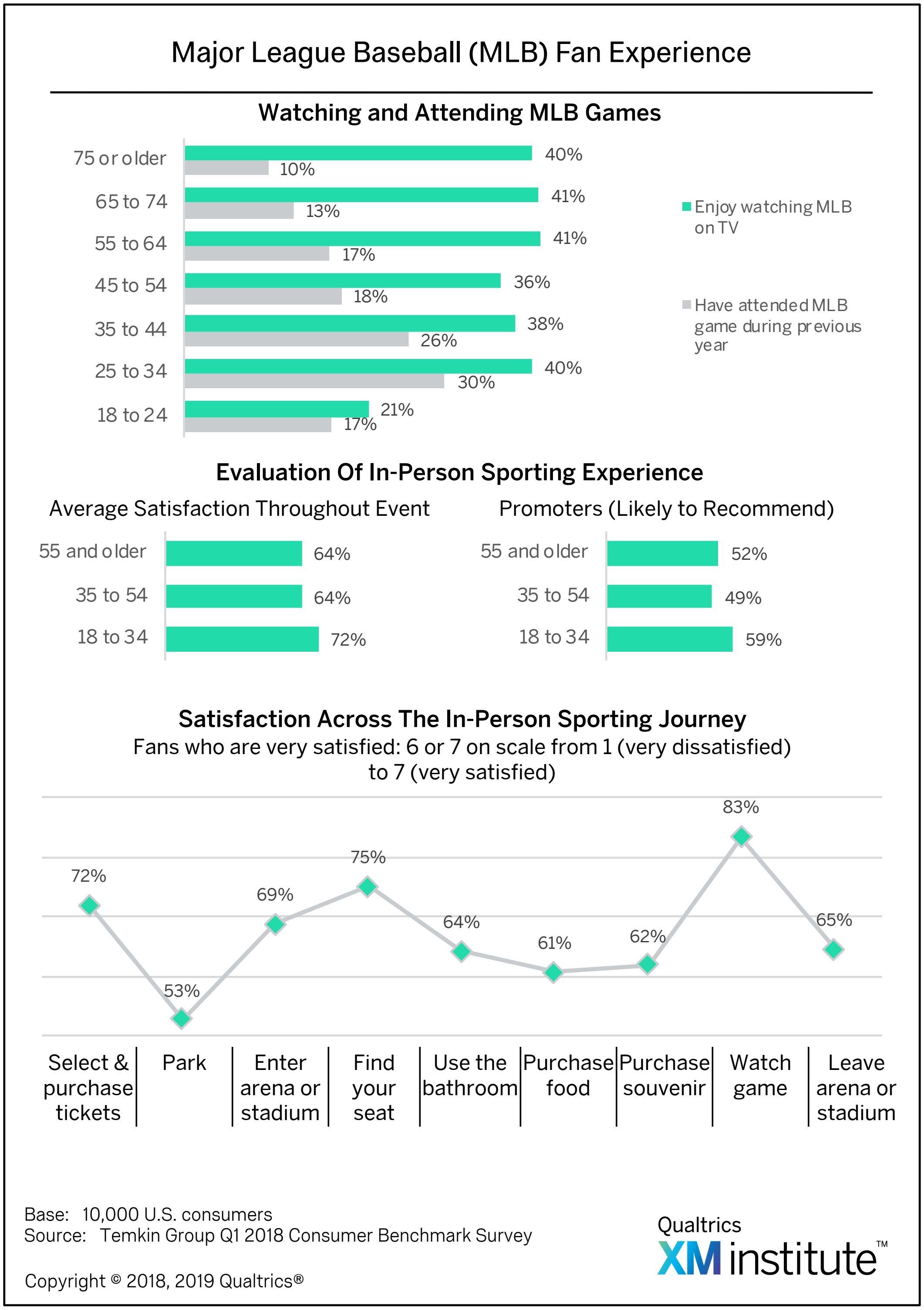
Major League Baseball (MLB) Fan Experience
Watching and Attending MLB Games
75 or older
40%
10%
65 to 74
41%
13%
55 to 64
41%
17%
45 to 54
36%
18%
35 to 44
38%
26%
25 to 34
40%
30%
18 to 24
21%
17%
Enjoy watching MLB on TV
Have attended MLB game during previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older 64%
35 to 54 64%
18 to 34 72%
Promoters (Likely to Recommend)
55 and older 52%
35 to 54 49%
18 to 34 59%
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
72%
53%
69%
75%
64%
61%
62%
83%
65%
Select & purchase tickets
Park
Enter arena or stadium
Find your seat
Use the bathroom
Purchase food
Purchase souvenir
Watch game
Leave arena or stadium
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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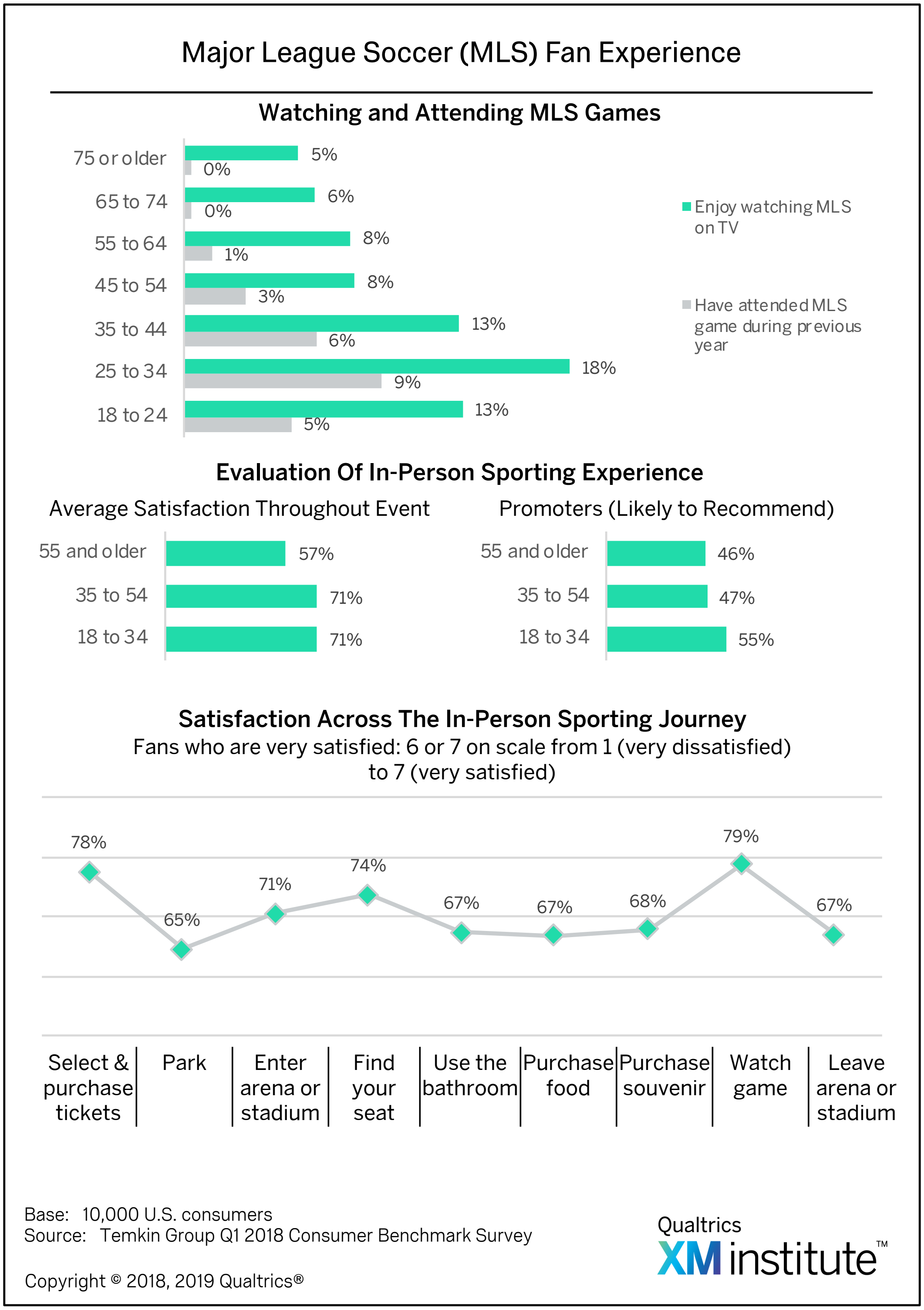
Figure 14



Major League Soccer (MLS) Fan Experience
Watching and Attending MLS Games
75 or older
65 to 74
55 to 64
45 to 54
35 to 44
25 to 34
18 to 24
5%
0%
6%
0%
8%
1%
8%
3%
13%
6%
18%
9%
13%
5%
Enjoy watching MLS on TV
Have attended MLS game during previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older 57%
35 to 54 71%
18 to 34 71%
Promoters (Likely to Recommend)
55 and older 46%
35 to 54 47%
18 to 34 55%
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
78%
65%
71%
74%
67%
67%
68%
79%
67%
Select & purchase tickets
Park
Enter arena or stadium
Find your seat
Use the bathroom
Purchase food
Purchase souvenir
Watch game
Leave arena or stadium
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 15

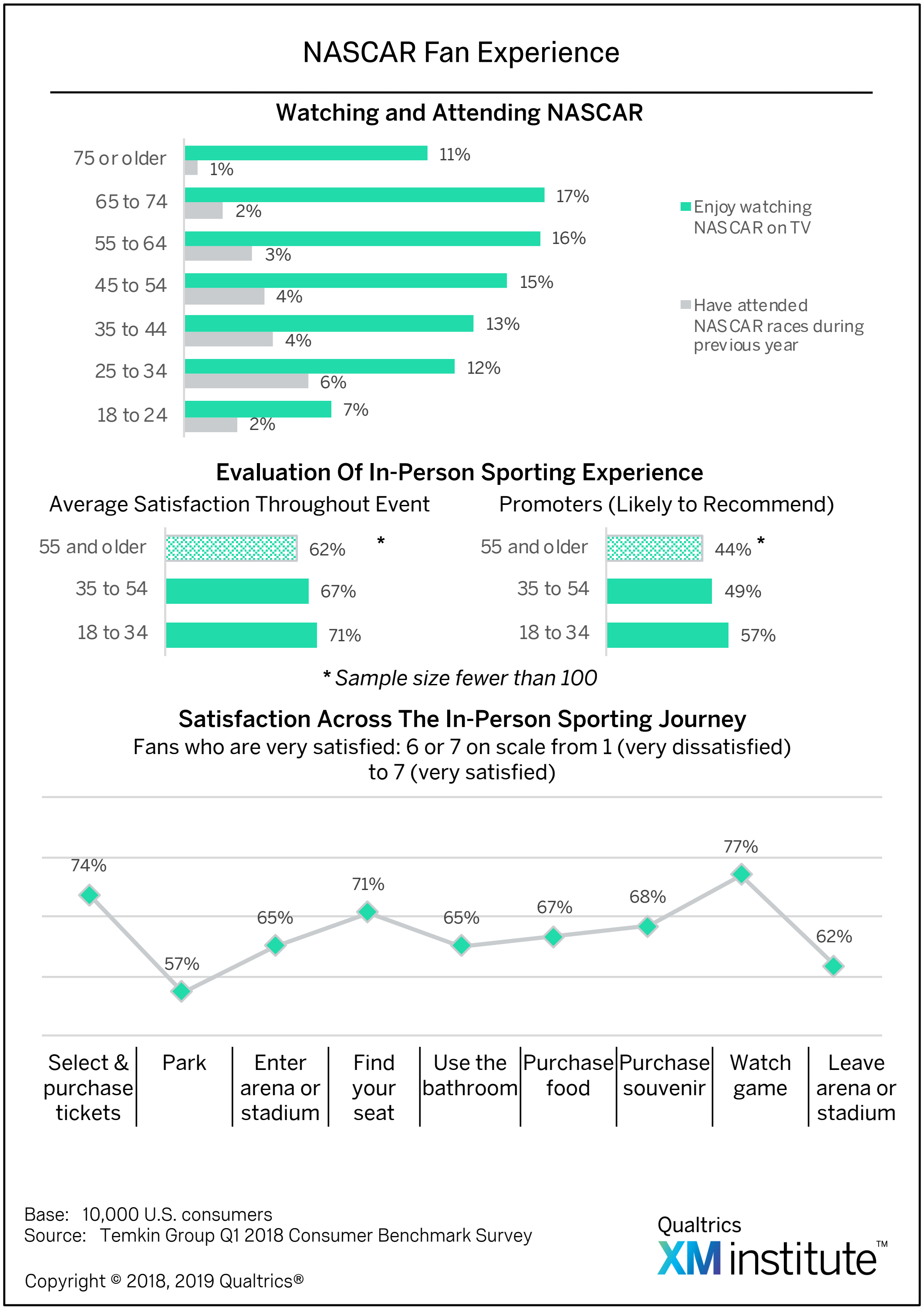
NASCAR Fan Experience
Watching and Attending NASCAR
75 or older
65 to 74
55 to 64
45 to 54
35 to 44
25 to 34
18 to 24
11%
1%
17%
2%
16%
3%
15%
4%
13%
4%
12%
6%
7%
2%
Enjoy watching NASCAR on TV
Have attended NASCAR races during previous year
Evaluation Of In-Person Sporting Experience
Average Satisfaction Throughout Event
55 and older 62% *
35 to 54 67%
18 to 34 71%
Promoters (Likely to Recommend)
55 and older 44% *
35 to 54 49%
18 to 34 57%
* Sample size fewer than 100
Satisfaction Across The In-Person Sporting Journey
Fans who are very satisfied: 6 or 7 on scale from 1 (very dissatisfied) to 7 (very satisfied)
74%
57%
65%
71%
65%
67%
68%
77%
62%
Select & purchase tickets
Park
Enter arena or stadium
Find your seat
Use the bathroom
Purchase food
Purchase souvenir
Watch game
Leave arena or stadium
Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2018 Consumer Benchmark Survey
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Figure 16

Customer Experience Competencies and Maturity

Four Customer Experience Core Competencies

CX Core Competencies

Purposeful Leadership
Do your leaders operate consistently with a clear, well-articulated set of values?

Compelling Brand Values
Are your brand attributes driving decisions about how you treat customers?

Employee Engagement
Are employees fully committed to the goals of your organization?

Customer Connectedness
Is customer feedback and insight integrated throughout your organization?

Six Stages of CX Maturity

1. Ignore	Organization does not focus on customer experience management and does not view customer experience as a core part of its value proposition.
2. Explore	Executive(s) recognizes that customer experience is important and selects a temporary group to examine how to make improvements.
3. Mobilize	Organization appoints a full-time executive to lead its CX efforts and that person builds a CX team, develops a CX roadmap, and makes small changes to customer interactions.
4. Operationalize	Clear CX governance structure in place and organization starts redesigning cross-functional operational processes. Internal communications becomes a critical activity.
5. Align	CX metrics are integrated into executive scorecards and business operational reviews, while CX behaviors are reinforced across the organization within core HR processes.
6. Embed	CX is an integral part of company culture and not managed as a separate activity or focus area.

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Figure 17