



January 2006

## **NFL: America's Choice**

"The National Football League is America's most popular sports league, comprised of 32 franchises that compete each year to win the Super Bowl, the world's biggest annual sporting event. Founded in 1920, the NFL developed the model for the successful modern sports league, including extensive revenue sharing, competitive excellence, strong franchises across the board, and national distribution. The NFL is the industry leader on a wide range of fronts. "Business Week" magazine calls the NFL "one of America's best-run businesses."

### **OVERVIEW**

- I. Television**
- II. Popularity/Surveys**
- III. Attendance/Blackout Lifts**
- IV. Sponsorship/Consumer Products**
- V. Online/Fantasy Football/Video Games**
- VI. Female Fans (And Children Too)**
- VII. Super Bowl Popularity/Event Entertainment**
- VIII. Youth Football**
- IX. Quotable (What They Are Saying About the NFL)**

# I. TELEVISION

## Television Viewership

- NFL games on broadcast TV (ABC, CBS and FOX) averaged 15.6 million viewers. NFL games on cable TV (ESPN) averaged 8.7 million viewers.
- Super Bowl XXXIX is the fifth most-watched program ever (133.7 million total viewers). The 12 most-watched programs in TV history are all Super Bowls.
- Super Bowl XXXIX was watched in record 222 countries
- Eleven NFL games during the 2004 season had as many or more viewers than prime time's five most-watched May 2005 season/series finales.

## STRONG VIEWERSHIP ON ALL NFL TELEVISION PARTNERS IN 2004

<u>Network</u>	<u>Average Viewers</u>
ABC	16.3 million
CBS	15.1 million
FOX	15.7 million
ESPN	8.7 million

Source: NFL, Nielsen Media Research

## NFL ALSO TOPPED LOCAL RATINGS

NFL games were the top-ranked program locally 69.3 percent of the time – up from 68 percent in 2004. Out of 489 local rating weeks this season, the No. 1 spot for the week for all programs in those individual markets went to an NFL game 339 times. That means that nearly seven of 10 times the NFL game drew higher local ratings than Desperate Housewives, CSI or any other popular TV show. Pittsburgh Steelers games earned the highest local ratings in any NFL market this season and were followed by the Green Bay Packers, Kansas City Chiefs, Indianapolis Colts and Buffalo Bills.

## COMPARATIVE RATINGS NOTE...NFL vs. PRIME TIME BROADCAST TV

NFL games on ABC, CBS and FOX averaged 15.6 million viewers – **61 percent higher than the average primetime viewership among the four major over-the-air networks** (9.7 million average on ABC, CBS, FOX, NBC).

## COMPARATIVE RATINGS NOTE...NFL vs. OTHER SPORTS ON BROADCAST TV

2005 ABC Monday Night Football season averaged a 10.8 rating which compares to a 5.5 average for the 2005 NBA Playoffs & Finals on ABC. 2005 NFL on FOX season averaged a 10.1 rating which compares to a 7.9 average for the 2005 MLB Playoffs & World Series on FOX.

## *By Widest Margin Ever....*

## NFL HAS EDGE ON BROADCAST PRIMETIME

	<u>NFL on Broadcast</u>	<u>Broadcast Primetime</u>	<u>NFL % Advantage</u>
1998 HH Rating	11.3	8.3	<b>36%</b>
1999 HH Rating	11.4	8.2	<b>39%</b>

2000 HH Rating	10.7	7.8	<b>37%</b>
2001 HH Rating	10.1	7.3	<b>38%</b>
2002 HH Rating	10.4	6.9	<b>51%</b>
2003 HH Rating	10.3	6.5	<b>58%</b>
2004 HH Rating	10.1	6.4	<b>58%</b>
2005 HH Rating	10.1	6.3	<b>60%</b>

*Source: NFL & Nielsen Media Research. NFL regular season on Broadcast television (ABC, CBS & FOX). Broadcast primetime on BIG 4 networks (ABC, CBS, NBC & FOX) all programs, NFL regular season dates used.*

## **NFL VS. ENTERTAINMENT PROPERTIES**

*Super Bowl ratings dominate against all entertainment properties.*

- **Average Rating for Each Event's Most Recent Airing**

<u>Program</u>	<u>Rating</u>
<b>Super Bowl XXXIX (Feb. 2005)</b>	<b>41.1</b>
2005 Academy Awards	25.4
2006 Golden Globes	12.5
2005 Emmy Awards	12.4
2005 Grammy Awards	11.6
2005 Country Music Awards	11.1

Source: NFL & Nielsen Media Research, most recent event airing

## **SUPER BOWL VS. OLYMPICS**

- **Based On Each Event's Most Recent Airing**

<u>Program</u>	<u>Rating</u>	<u>Average Viewers</u>	<u>Average Viewers Age 18-49</u>
Super Bowl XXXIX (Feb. 6, 2005)	41.1	86.1 million	43.1 million
Total 2004 Summer Olympics (in primetime)	15.0	24.6 million	11.2 million
<b>Super Bowl Advantage</b>	<b>174%</b>	<b>250%</b>	<b>286%</b>
Highest-Rated Individual Night Of 2004 Summer Olympics (August 19, 2004)	19.3	31.7 million	15.1 million
<b>Super Bowl Advantage</b>	<b>113%</b>	<b>172%</b>	<b>185%</b>

Source: NFL & Nielsen Media Research

## **NFL 2005 TV RECAP**

***NEARLY 200 MILLION AMERICANS WATCHED NFL GAMES***

***NFL RATES 61 PERCENT HIGHER THAN OTHER  
PRIMETIME PROGRAMMING***

***NFL GAMES ARE 4 OF TOP 10 NETWORK PROGRAMS;  
TOP 5 AMONG MEN 18-49; 9 OF TOP 10 CABLECASTS***

***BRONCOS, COLTS & COWBOYS EACH IN THREE  
OF LEAGUE'S 10 MOST-WATCHED GAMES***

Football fans across America continued to tune their televisions to NFL games in large numbers in 2005. Nearly 200 million Americans (195.8 million according to Nielsen Media Research) – or approximately seven of every 10 people in the U.S. – watched NFL games in 2005.

Consider these end-of-season facts:

- NFL viewership on broadcast television finished ahead of network primetime viewership by its widest margin ever. NFL games on ABC, CBS and FOX averaged 15.6 million viewers – **61 percent higher than the average primetime viewership among the four major over-the-air networks** (9.7 million average on ABC, CBS, FOX, NBC).
- NFL games account for four of the top 10 programs on network television this season (see chart below). In addition, NFL games account for the five of the top seven shows among men 18-34 and six of the top seven (including the top five) programs among men 18-49 (see charts below).
- ESPN NFL games accounted for 9 of the 10 most-watched basic cable programs in 2005 (see chart below).
- NFL games were the top-ranked program locally 69.3 percent of the time – up from 68 percent in 2004. Out of 489 local rating weeks this season, the No. 1 spot for the week for all programs in those individual markets went to an NFL game 339 times. That means that nearly seven of 10 times the NFL game drew higher local ratings than Desperate Housewives, CSI or any other popular TV show.

Following are the top network television programs nationally in average total viewers each week:

<b><u>Network</u></b>	<b><u>Viewers</u></b>
<b><u>Program</u></b>	
1. CSI	24.4 million
2. Desperate Housewives	22.3 million
<b>3. FOX National Game</b>	<b>20.4 million</b>
<b>4. CBS National Game</b>	<b>19.2 million</b>
5. Without A Trace	18.35 million
6. Survivor: Guatemala	18.30 million
7. Grey's Anatomy	17.7 million
8. CSI: Miami	17.5 million
<b>9. ABC Monday Night Football</b>	<b>16.3 million</b>
<b>10. FOX Single Game</b>	<b>15.7 million</b>

Following are this season's top 15 programs on network television in key demographics (avg. rating):

<b><u>Men 18-34</u></b>		<b><u>Men 18-49</u></b>	
<b><u>Program</u></b>	<b><u>Rating</u></b>	<b><u>Program</u></b>	<b><u>Rating</u></b>
<b>1. FOX National Game</b>	<b>9.1</b>	<b>1. FOX National Game</b>	<b>10.5</b>
<b>2. CBS National Game</b>	<b>8.4</b>	<b>2. CBS National Game</b>	<b>9.9</b>
<b>3. ABC Monday Night Football</b>	<b>7.6</b>	<b>3. ABC Monday Night Football</b>	<b>8.7</b>
4. The Simpsons	7.1	<b>4. FOX Single Game</b>	<b>8.1</b>
5. Family Guy	6.9	<b>5. CBS Single Game</b>	<b>6.9</b>
<b>6. FOX Single Game</b>	<b>6.8</b>	6. CSI	6.6
<b>7. CBS Single Game</b>	<b>5.9</b>	<b>7. CBS Regional Game</b>	<b>6.5</b>
7. American Dad	5.9	8. Desperate Housewives	6.4
<b>9. CBS Regional Game</b>	<b>5.7</b>	9. The Simpsons	6.1
10. The OT (Fox NFL Postgame)	5.6	10. The OT (Fox NFL Postgame)	6.0
11. War at Home	5.5	<b>11. FOX Regional Game</b>	<b>5.9</b>
12. Desperate Housewives	5.4	11. ABC NFL Monday Showcase	5.9
<b>13. FOX Regional Game</b>	<b>5.2</b>	13. Lost	5.5
14. ABC NFL Monday Showcase	4.9	14. Survivor: Guatemala	5.3
15. Grey's Anatomy	4.8	15. Family Guy	5.2
15. CSI	4.8		

Broadcast Notes:

**Regional** -- First window of a doubleheader

**National** -- Second window of a doubleheader

**Single** -- Only window on network not airing doubleheader that week.

Source: NFL, Nielsen Media Research, 9/8/05-1/1/06

Following are the 10 most-watched regular-season games in 2005:

<u>Date</u>	<u>Program (Game)</u>	<u>Viewers</u>
Nov. 24	CBS Thanksgiving (Broncos-Cowboys)	26.4 million
Nov. 27	FOX Sunday National (mostly Giants-Seahawks)	24.2 million
Jan. 1	FOX Sunday National (mostly Redskins-Eagles)	23.1 million
Nov. 28	ABC Monday Night (Steelers-Colts)	22.6 million
Nov. 7	ABC Monday Night (Colts-Patriots)	21.9 million
Dec. 4	CBS Sunday National (mostly Broncos-Chiefs)	21.4 million
Dec. 18	CBS Single Game (mostly Chargers-Colts)	21.3 million
Sept. 11	FOX Sunday National (mostly Cowboys-Chargers)	21.3 million
Dec. 11	CBS Sunday National (mostly Chiefs-Cowboys)	21.2 million
Oct. 30	FOX Sunday National (mostly Eagles-Broncos)	21.0 million

Source: NFL, Nielsen Media Research, 9/8/05-1/1/06

Following are the most watched programs on basic cable in 2005:

<u>Program, Date</u>	<u>Viewers</u>
<b>1. ESPN NFL Football (Colts-Ravens), 9/11</b>	<b>11.25 million</b>
<b>2. ESPN NFL Football (Eagles-Redskins), 11/6</b>	<b>11.21 million</b>
<b>3. ESPN NFL Football (Falcons-Bears), 12/18</b>	<b>10.45 million</b>
<b>4. ESPN NFL Football (Chiefs-Raiders), 9/18</b>	<b>10.34 million</b>
<b>5. ESPN NFL Football (Browns-Steelers), 11/13</b>	<b>9.82 million</b>
<b>6. ESPN NFL Football (Giants-Chargers), 9/25</b>	<b>9.75 million</b>
<b>7. ESPN NFL Football (Bills-Patriots), 10/30</b>	<b>9.70 million</b>
8. TNT NBA Playoff Game, 6/6	9.15 million
<b>9. ESPN NFL Football (Lions-Packers), 12/11</b>	<b>8.90 million</b>
<b>10. ESPN NFL Football (Vikings-Ravens), 12/25</b>	<b>8.76 million</b>

Source: NFL, Nielsen Media Research, 1/1/05-12/31/05

## **...AND THE STRONG RATINGS CONTINUED INTO THE PLAYOFFS**

### **NFL PLAYOFF RATINGS TOP OTHER SPORTS' CHAMPIONSHIP SERIES**

Most Recent Postseason Rating Averages, By Sport

<u>Sport</u>	<u>Average Rating</u>	<u>Average Share</u>
<b>2005 NFL Playoffs*</b>	<b>18.0</b>	<b>33</b>
2005 World Series	11.1	19
2005 NBA Finals	8.2	15

*\*does not include Super Bowl*

## ***NFL Wild Card games ranked as 4 of the 10 most-watched programs that week***

NFL playoff games accounted for 4 of the 10 most-watched programs on television that week. Pre & post-game ABC programming on Saturday took 2 additional spots.

### **Most-Watched Shows on Television, Week of Jan. 2-8, 2006**

<b><u>Program</u></b>	<b><u>Average Viewers</u></b>
1. Rose Bowl (USC-Texas)	35.6 million
<b>2. CBS AFC Wild Card Playoff (Steelers-Bengals)</b>	<b>30.4 million</b>
3. CSI	27.2 million
4. ABC Wild Card Mid Postgame	24.7 million
5. Rose Bowl pregame	24.5 million
6. Desperate Housewives	23.7 million
<b>7. FOX NFC Wild Card Playoff (Panthers-Giants)</b>	<b>22.8 million</b>
<b>8. ABC AFC Wild Card Playoff (Jaguars-Patriots)</b>	<b>22.6 million</b>
9. ABC Wild Card Showcase Pregame	22.0 million
<b>10. ABC NFC Wild Card Playoff (Redskins-Bucs)</b>	<b>21.8 million</b>

Source: NFL & Nielsen Media Research

## ***NFL Divisional Playoffs ranked as the 4 most-watched programs last week***

NFL playoff games accounted for the 4 most-watched programs on television last week.

### **Most-Watched Shows on Television, Week of Jan. 9-15, 2006**

<b><u>Program</u></b>	<b><u>Average Viewers</u></b>
<b>1. CBS AFC Divisional Playoff (Steelers-Colts)</b>	<b>33.8 million</b>
<b>2. FOX NFC Divisional Playoff (Panthers-Bears)</b>	<b>32.7 million</b>
<b>3. CBS AFC Divisional Playoff (Patriots-Broncos)</b>	<b>26.2 million</b>
<b>4. FOX NFC Divisional Playoff (Redskins-Seahawks)</b>	<b>24.3 million</b>
5. Desperate Housewives	22.5 million

Source: NFL & Nielsen Media Research

## ***NFL Conference Championship games ranked as 2 of the 3 most-watched programs that week***

### **Most-Watched Shows on Television, Week of Jan. 16-22, 2006**

<b>1. AFC Championship Game (Pittsburgh-Denver)</b>	<b>39.0 million viewers</b>	<b>CBS</b>
2. American Idol-Tuesday (season premiere)	35.5 million viewers	FOX
<b>3. NFC Championship Game (Carolina-Seattle)</b>	<b>35.2 million viewers</b>	<b>FOX</b>
4. American Idol-Wednesday	31.6 million viewers	FOX
5. CSI	27.1 million viewers	CBS

***NFL Network. Where Football Season Never Ends***

Turning two years old in November 2005, NFL Network joined TNT as the only channels ever to reach 35 million subscribers inside of two years. Armed with distribution deals with the nation's largest cable company, Comcast, the two largest satellite providers, DirecTV and Dish Network, and five of the seven largest providers overall, NFL Network is now available throughout North America to more than 70 million homes and has quickly established itself as *the* network for fans to turn to for news, interviews and information on the National Football League.



## II. Popularity/Surveys

### **SURVEY SAYS:**

#### **NFL's POPULARITY CONTINUES TO GROW: HARRIS POLL**

The lead is getting bigger! For the third consecutive year, more than twice as many people name professional football (33 percent) as their favorite sport over baseball (14 percent). Pro football's 19 percent edge over the second-most popular sport is its largest ever. In addition, pro football has gained in popularity more than any other sport over the past 20 years...with a nine percent increase in popularity over those two decades (from 24 percent to 33 percent). Those are among the findings of the latest annual Harris Poll on American attitudes toward sports. Pro football moved ahead of baseball as the fans' favorite for the first time in 1965. Rounding out the top five most favorite sports were college football (13 percent), auto racing (11 percent) and men's college basketball and hockey (5 percent each).

<u>Year</u>	<u>Most Popular Sport (Percent)</u>	<u>Second Most Popular (Percent)</u>	<u>Difference</u>
2005	Pro Football (33%)	Baseball (14%)	<b>19%</b>
2004	Pro Football (30%)	Baseball (15%)	<b>15%</b>
1998	Pro Football (26%)	Baseball (18%)	<b>8%</b>
1993	Pro Football (24%)	Baseball (18%)	<b>6%</b>
1985	Pro Football (24%)	Baseball (23%)	<b>1%</b>

Source: Harris Poll, December 2005

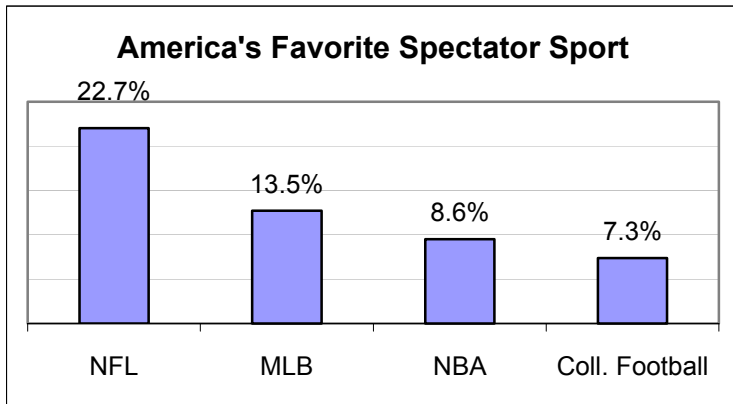
#### **MOST POPULAR MERCHANDISE**

##### ***Percent of Sports Fans (Age 12+) Owning League Licensed Apparel***

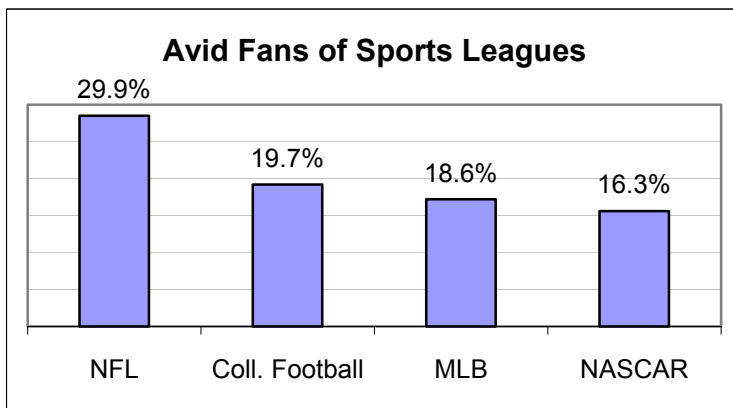
NFL	32%
MLB	16%
NBA	10%
NHL	4%

Source: ESPN Sports Poll, 2005

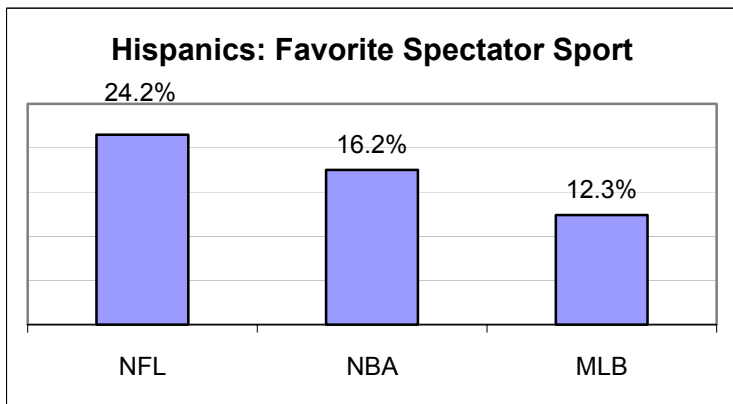
Following is a graphical look at the NFL's popularity:



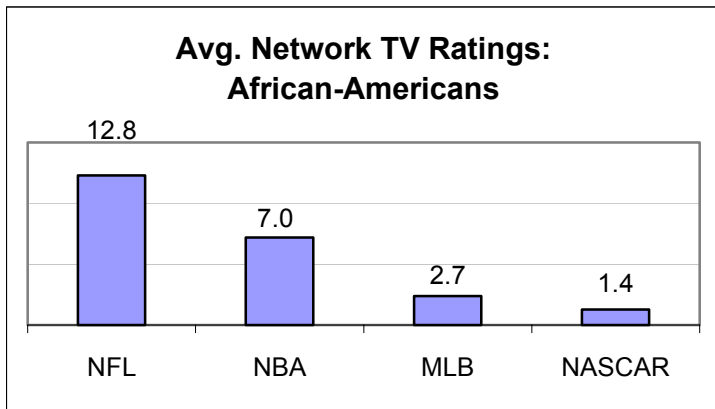
Source: 2004 ESPN Sports Poll



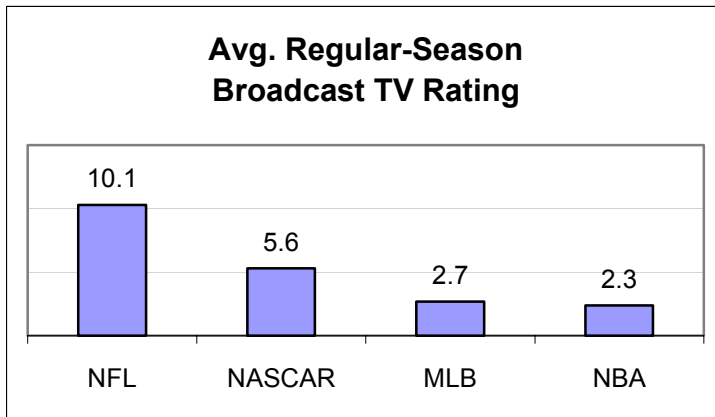
Source: 2004 ESPN Sports Poll



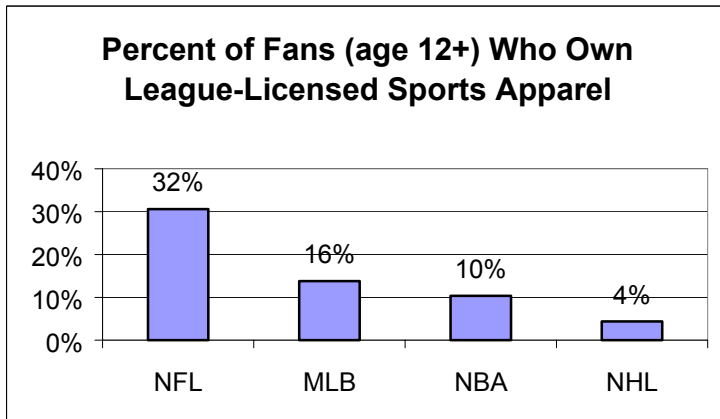
Source: 2004 ESPN Sports Poll



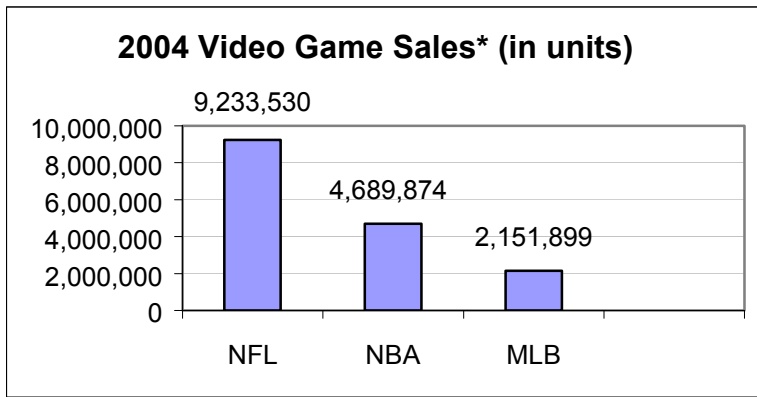
Source: NFL and Nielsen Media Research 2004-05



Source: NFL and Nielsen Media Research 2004-05

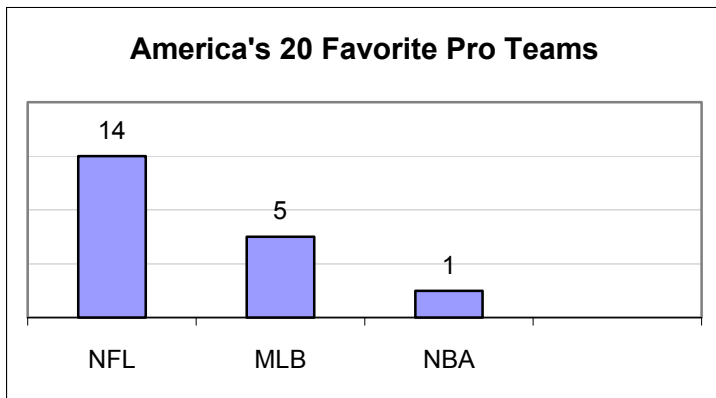


Source: 2005 ESPN Sports Poll



Source: TRST Data/ NPD Group

\*Represents 2004 releases sold in 2004 calendar year



Source: 2004 ESPN Sports Poll

### III. Attendance/Blackout Lifts

#### ATTENDANCE

#### NFL Attendance Sets Record in 2005

Total Paid Attendance (Regular Season + Postseason)

<b>2005</b>	<b>17,011,986</b>	<b>** NFL Regular-Season Record</b>
<b>2004</b>	<b>17,789,776</b>	<b>**NFL Record (Regular Season + Postseason)</b>
2003	17,719,130	
2002	17,615,254	
2001	16,933,163	
2000	17,196,421	
1999	17,000,399	
1998	16,187,758	
1997	15,769,193	

\*\*The 17,011,986 tickets sold to the NFL's 256 regular-season games in 2005 represented paid attendance at more than 90 percent of capacity.

#### **Record For Average Attendance Also Set in 2005...**

Paid attendance for NFL regular-season games set a record for the third consecutive year, increasing in 2005 to an all-time mark of 66,453 per game. The previous record was set in 2004 when an average of 66,409 tickets per game was sold for NFL regular-season games.

#### BLACKOUT LIFTS

<u>SEASON</u>	<u>%</u>	<u>NUMBER LIFTED, NUMBER OF GAMES</u>
2005	95%	244-256 (includes lifts for all Saints games)
2004	88%	226-256
<b>2003</b>	<b>90%</b>	<b>230-256 **TIES RECORD**</b>
<b>2002</b>	<b>90%</b>	<b>230-256 **RECORD**</b>
2001	84%	209-248
2000	86%	213-248
1999	84%	209-248
1998	75%	181-240
1997	66%	158-240
1996	68%	162-240
1995	67%	161-240
1994	65%	145-224
1993	67%	140-210
1992	68%	152-224
1991	67%	150-224
1990	61%	136-224
1989	62%	138-224
1988	60%	135-224
1987		STRIKE YEAR
1986	58%	131-224
1985	56%	126-224

1984	53%	118-224
1983	54%	121-224
1982	STRIKE YEAR	
1981	71%	160-224
1980	65%	146-224
1979	60%	135-224
1978	50%	110-224
1977	44%	86-196
1976	44%	86-196
1975	41%	75-182
1974	47%	86-182
1973	60%	109-182

## IV. Sponsorship/Consumer Products

### SPONSORSHIP

Following are the most recent NFL sponsorship agreements with blue chip companies:

December 2000 – NFL signs 10-year deal with **Reebok** to manufacture and sell NFL licensed merchandise, including uniforms, sideline apparel, footwear and the NFL Equipment apparel line.

July 2001-NFL signs a 5-year deal internet deal with **AOL Time Warner, Viacom (CBS) and CBS Sportsline.**

November 2002: NFL signs a 5-year extension with **Motorola**

March 2002: NFL signs a 5-year deal with **Coors**

March 2002: NFL signs a 5-year deal with **Pepsi**

October 2002: NFL signs a multi-year deal with **Masterfoods** (Snickers)

December 2002: NFL signs a 5-year extension with **DIRECTV** for satellite exclusivity for distribution of NFL Sunday Ticket

July 2003: NFL signs a multi-year deal with **Bayer** and **GlaxoSmithKline**

July 2003: NFL signs a multi-year deal with **IBM**

September 2003: NFL signs a 6-year extension with **MBNA** for credit card rewards program

December 2003: NFL signs 5-year extension with **Footlocker.com** to produce NFL Shop site/catalog

December 2003: NFL signs 7-year deal with **Sirius** (satellite radio package)

January 2004: NFL signs 6-year extension with **Visa**

February 2004: NFL signs 8-year extension with **Gatorade**

April 2004: NFL signs 7-year extension with **Pepsi**

April 2004: NFL signs 3-year extension with **Campbell's**

August 2004: NFL signs 3-year extension with **Canon**

August 2004: NFL signs 3-year extension with **Southwest Airlines**

October 2004: NFL signs with **Ameriquest Mortgage Company**

May 2005: NFL signs multi year deal with **Burger King**

July 2005: NFL signs multi-year deal Proctor & Gamble's **Prilosec**

August 2005: NFL signs 5-year wireless content & sponsorship deal with **Sprint**

September 2005: NFL signs multi-year extension with **Coors**

October 2005: NFL signs 2-year deal with **Samsung** (official HDTV)

### CONSUMER PRODUCTS

- *NFL is world's largest sports brand*

#### 2004 Licensing Retail Sales

NFL	\$3.4 billion
MLB	\$3.2 billion
NASCAR	\$2.1 billion
NBA	\$1.0 billion
NHL	\$1.0 billion

Source: *USA Today*, May 27, 2005

## NFL Video Games Top Competition

### Top console and handheld games of 2005:

1. **Madden NFL 06 (PS2), Electronic Arts, more than 2.9 million sold**
2. Pokemon Emerald (GBA), Nintendo of America, more than 1.7 million sold
3. Gran Turismo 4 (PS2), SCEA, more than 1.5 million sold
4. **Madden NFL 06 (Xbox), Electronic Arts, more than 1.2 million sold**
5. NCAA Football 06 (PS2), Electronic Arts, more than 1.1 million sold
6. Star Wars: Battlefront II (PS2), LucasArts, more than 1 million sold
7. MVP Baseball 2005 (PS2), Electronic Arts, more than 970,000 sold
8. Star Wars Episode III: Revenge of the Sith (PS2), LucasArts, more than 930,000 sold
9. NBA Live 06 (PS2), Electronic Arts, more than 820,000 sold
10. LEGO Star Wars (PS2), Eidos, more than 800,000 sold

Source: Gamespot magazine

## V. Online/Fantasy Football/Video Games

### INTERNET TRAFFIC

- NFL Internet Network, featuring NFL.com & team websites, has helped grow brand & fan popularity.
- NFL topped internet traffic among all sports leagues, according to Comscore MediaMetrix.

### ***NFL Internet Network vs. Other Sports Leagues***

For the year, the NFL Internet Network was the most visited among all sports league sites. Following is the average monthly traffic among sports leagues during the NFL season and for the year:

<u>Website</u>	<u>Avg. Unique Users, Sept.-Dec. 2005</u>	<u>Avg. Monthly Unique Users, 2005</u>
<b><i>NFL Internet Network</i></b>	<b><i>14.8 million</i></b>	<b><i>10.5 million</i></b>
MLB.com	7.4 million	8.3 million
NASCAR	3.6 million	4.0 million
NBA Internet Network	4.1 million	4.4 million
NHL Network	2.6 million	1.5 million

Source: comScore Media Metrix, January-December 2005

## **NFL TOPS AMONG FANTASY SPORTS**

*According to ESPN Sports Poll, more fantasy players played NFL fantasy games than any other sport.*

### **In Which Type of Fantasy or Rotisserie League Games Have You Participated in The Past 12 Months?**

<b><i>NFL</i></b>	<b><i>53.4%</i></b>
NBA	23.3%
MLB	20.9%
NHL	4.9%
Other	22.8%

Source: ESPN Sports Poll, Jan.-Sept. 2004



## **Fantasy Football Participants**

According to the *Wall Street Journal*, **NFL fantasy games had 7.8 million unique users** in its peak month last year – **more than the next five sports combined** (chart below).

<u>Fantasy Sport</u>	<u>Peak Month</u>	<u>Unique Users</u>
<b>NFL</b>	<b>Sept. 2004</b>	<b>7.8 million</b>
MLB	April 2004	3.4 million
NBA	Dec. 2004	2.1 million
Nascar	Feb. 2005	0.8 million
NHL	Jan. 2004	0.5 million
PGA	Jan. 2005	0.4 million

Source: comScore Media Metrix, Jan. 2004 through Feb. 2005, in *Wall St. Journal* (8/29/05)

## **Fantasy Football Boom**

- More than 12 million adults expected to played fantasy football last (3.5 million women – see note in section on female fans below).
- In the past year, 7.2 percent of all adult Americans played fantasy sports, with 78% of those participants playing fantasy football.
- The average fantasy football player plays in 2.4 fantasy football leagues per year and spends an average of \$154 on fantasy football, ranging from entry fees, commissioner services, fantasy news sites and draft publications.
- The average fantasy football participant has been playing for six years and spends almost three hours a week managing his teams.

(Source: Fantasy Sports Trade Association, August 2003)

## **“MADDEN NFL 2004” VIDEO GAME**

### ***More Popular Than Prime-time Television In Key Demo***

- 18-to-34 year old men play Madden NFL 2004 an average of 7.7 hours per week, according to EA Sports. That’s more than they watch prime-time TV.

Source: *Wall Street Journal* (11/21/03)

## VI. Female Fans (And Children Too)

### WOMEN ARE HUGE NFL FANS

#### **SURVEY SAYS:**

#### **NFL Is Favorite Spectator Sport Among Women**

The Harris Poll asked women to name their favorite spectator sport. NFL football was tops among women and exceeded the combined total of the next three professional sports leagues (MLB, NASCAR and the NBA). Following are the most popular spectator sports among women (*Harris Poll*, September 2004).

<b>"WHICH SPORT IS YOUR FAVORITE?"</b>		
<b>RK</b>	<b>SPORT</b>	<b>U.S. WOMEN</b>
1)	NFL	30%
2)	MLB	14%
3)	College Football	10%
4)	NASCAR	8%
5)	NBA	7%

- 375,000 women attend NFL games each weekend
- More than 45 million women watch NFL games each weekend
- More than 1 million girls annually participate in NFL Pepsi Punt, Pass & Kick
- More than 10,000 women annually attend NFL 101 Workshops for Women (which covers life in the NFL, the history of football, strategy, equipment and officiating).

### FOOTBALL TOPS FIGURE SKATING AMONG FEMALE FANS

#### Which Sport Are You "Most Interested" In?

NFL	37%
Figure Skating	30%
Gymnastics	26.5%
MLB	25.5%
NBA	14%
NHL	14%

Source: Sept. 29, 2003 *Brandweek*; citing Octagon survey of women 18-54

### FANTASY FOOTBALL

In the past year, among all fantasy sports players, 77 percent played fantasy football as compared to 38 percent for baseball, and 35 percent for basketball.

#### **3.5 MILLION WOMEN PLAY FANTASY FOOTBALL**

"More than 25 percent of the estimated 15 million fantasy players are [women], according to a study done by the marketing research company Ipsos. That's 3.75 million."

Source: December 12, 2003 *Philadelphia Daily News* citing Ipsos research

## **MORE WOMEN WATCH THE SUPER BOWL THAN THE ACADEMY AWARDS**

Among Total Females Ages 2+  
Super Bowl XXXIX: 37,519,000  
2005 Academy Awards: 27,476,000  
**SB Advantage: +42%**

Among Women 18-34  
Super Bowl XXXIX: 8,394,000  
2005 Academy Awards: 5,306,000  
**SB Advantage: +58%**

Among Women 18-49  
Super Bowl XXXIX: 19,325,000  
2005 Academy Awards: 12,144,000  
**SB Advantage: +59%**

Among Women 25-54  
Super Bowl XXXIX: 19,167,000  
2005 Academy Awards: 12,788,000  
**SB Advantage: +50%**

## **KIDS ARE MORE LIKELY TO WATCH NFL ON TELEVISION & OWN NFL MERCHANDISE**

### **CHILDREN (AGE 7-11) ARE MORE LIKELY TO WEAR NFL MERCHANDISE**

Percentage of children age 7-11 who own clothing related to a league or sport:

<b>NFL</b>	<b>39.4%</b>
MLB	24.7%
NBA	23.8%
College Football	14.6%
Extreme Sports	12.7%
NASCAR	12.5%
College Basketball	10.3%
NHL	10.3%
MLS	9.8%

Source: ESPN Sports Poll, Jan.-June 2005

### **CHILDREN (AGE 7-11) ARE MORE LIKELY TO WATCH THE NFL ON TV**

Percent of children age 7-11 who watch particular sports on TV:

<b>NFL</b>	<b>73.6%</b>
NBA	68.2%
MLB	62.4%
Nascar	57.1%
Extreme Sports	56.9%
College Football	56.5%
College Basketball	53.6%
Pro Wrestling	44.6%
MLS	43.6%
AFL	39.7%
WNBA	38.3%
Pro Golf	35.9%
NHL	34.9%

Source: ESPN Sports Poll, Jan.-June 2005

## VII. Super Bowl Popularity/Event Entertainment

### SUPER BOWL FACTOIDS

- More people watched Super Bowl XXXIX (**133.7 million viewers**) than voted in the 2004 Presidential election or went out to celebrate New Year's Eve.
- There are **7.5 million parties** on Super Bowl Sunday, with **43.9 million party-goers** (National Retail Federation)
- **1.5 million TV sets** will be sold the week leading up to Super Bowl (National Retail Federation)
- Sales of **big screen TVs show fivefold increase** during Super Bowl week (National Electronic Dealers Association)
- Super Bowl is **top at-home party** event of year, ahead of New Year's Eve (Hallmark Cards, Inc.)
- Average Number of Attendees for a Super Bowl party is **17** (Hallmark)
- Super Bowl Sunday is the **second-largest day of food consumption** behind Thanksgiving (American Institute of Food Distribution)
- On Super Bowl Sunday, Americans consume **8 million pounds of guacamole** (California Avocado Commission)
- **Antacid sales increase 20 percent** the day after Super Bowl (7-11 stores)
- Super Bowl weekend is the **slowest weekend for weddings** (multiple sources)
- Estimated **14,500 tons of chips** and **4,000 tons of popcorn** eaten on Super Bowl Sunday (multiple)

### ENTERTAINERS REAP BENEFITS OF PERFORMING AT NFL EVENTS

Following **Paul McCartney's** Super Bowl XXXIX halftime show, "products bearing his name were flying off the shelves at Amazon.com." Sales ranks for his CDs' "All the Best" and "Wingspan" jumped from 3,115 to 331 and 1,060 to 144, respectively (*PHILADELPHIA INQUIRER*, 2/9/05).

(Source: Billboard Magazine)

-- Josh Groban's first ever television appearance was the anthem at the Thanksgiving game in Detroit in 2001. His album went on to sell 27,000 copies over Thanksgiving weekend.

-- Good Charlotte went from 71 to 17 on the Billboard chart after performing at the 2003 Kickoff event.

-- U2's 2 year old album went from 108 on Billboard top 100 to 8 after performing at the Super Bowl. The album sold 108,000 copies the week after the Super Bowl.

-- Mary J. Blige was #1 on the chart after the Kickoff event

-- Bon Jovi sold 286,000 copies of Bounce (his highest ever opening album) after doing the Kickoff event.

## **VIII. Youth Football**

### ***YOUTH FOOTBALL IS TOPS ON THE AGENDA...***

#### **NFL YOUTH OUTREACH PROGRAMS**

##### **NFL Youth Football Fund:**

- The NFL Youth Football Fund is a \$150 million nonprofit foundation run by the NFL and the NFL Players Association to support youth development and ensure the future health of the game.

##### **Play It Smart:**

- The Play It Smart academic program is an initiative of the NFL Youth Football Fund partnered with the National Football Foundation.
- A \$1.5 million grant has been bestowed for high school football teams.
- 88 schools nation-wide participate in the program.
- The primary goals of the Play It Smart program are to: redirect school football programs that are on the decline and increase participation; strengthen classroom skills of student athletes; and use the game to build leadership qualities in young men and positively affect their personal development.
- The program has been a complete success – achieving all goals. Play It Smart participants graduate high school at a rate of 95 percent, with 87 percent going on to college (compared to the national average of 40 percent).

##### **NFL/NFF Coaching Academy:**

- Collaborative effort by the NFL, the NFL Youth Football Fund and the National Football Foundation.
- Mission: To elevate the quality of coaching at the youth and high school levels with focus not on just the game, but also on life-skills development, program management, safety, health and nutrition.
- Coaches in 40 cities take part in two-day Coaching Academy seminars including both classroom and on-field elements (31 programs took place in NFL team facilities).
- Coaches receive a CD-ROM, teaching points, playbooks and additional resources.

##### **NFL Grassroots Program:**

- Goals of the program are to provide nonprofit, neighborhood-based organizations with financial and technical assistance to improve the quality, safety, and accessibility of local football fields.
- Partnership with the Local Initiatives Support Corporation.
- Grants up to \$100,000 are available for capital improvement projects (\$200,000 available for artificial surfaces).
- NFL also works with its member clubs to support local field construction and renovation projects initiated by teams in their home cities.
- Program has donated more than \$7.9 million to rebuild more than 88 athletic fields in more than 50 cities.

##### **NFL Flag Football:**

- More than 100,000 boys and girls in all 32 NFL cities and throughout the country play in NFL Flag football leagues.
- Leagues are in the fall and spring and are organized through local youth groups.
- Requires minimal equipment and offers young players non-contact involvement with football.
- There are eight regional NFL Flag tournaments held around the country during October.
- Top teams from each regional/divisional tournament advance to the Tournament of Champions in November at DISNEY'S WIDE WORLD OF SPORTS ® complex in Orlando, Florida, which is televised on ESPN and ESPN2.

- It is also an international program, with leagues in Canada, Mexico, Japan, Europe and Asia, as well as an international championship tournament held in August.

#### **NFL Player Development Programs:**

- The NFL Player Development programs are offered to two different youth levels.
- The NFL Junior Player Development program is geared toward boys aged 12-14.
- Participants receive instruction at each football position as well as counseling through a life-skills/character-development curriculum.
- The NFLHS Player Development program provides inner-city, public high school sophomores through seniors with on-field training, as well as an equal emphasis on what it takes to become a successful student-athlete at the collegiate level.

#### **NFL Pepsi Punt, Pass & Kick:**

- The NFL Pepsi Punt, Pass & Kick (PP&K) program offers boys and girls ages 8-15 the opportunity to compete against each other in football skills events.
- More than 4 million boys and girls participate each season from July through January.
- Thousands of schools have added PP&K to their physical education curriculums.
- One of the world's largest youth sports participation programs and is also the oldest, dating back to 1961.

## **IX. Quotable (What They Are Saying About the NFL)**

### **QUOTABLE**

"When it comes to corporate entertaining, the Super Bowl is in a league of its own" – Craig Erlich, president of Star Trax Corporate, a Southfield, Mich. event planning and entertainment company (Detroit News, 1/15/06)

"The event defies all trends of audience fragmentation." – Washington Post, 1/14/06

"The Super Bowl is a huge, rocket shot of creativity for a day with a tremendous amount of viewership." – Bill Cella, CEO of Magna Global, which buys advertising time (USA Today, 1/6/06)

"The Super Bowl in the end has an engagement value that is second to none." – Ed Erhardt, ad sales president for ESPN and ABC Sports (USA Today, 1/6/06)

"You have to have a product or a service that scales to the constituents. The Super Bowl is one of those properties that do a very important thing in capturing the population and the imagination all in one. It scales, it has lean-forward interest, it's a sought-after event. And the advertising is as heralded as the game itself. It's an experiential marketing event." – OMD East Managing Director Mark Stewart (Ad Age, 12/9/05)

"Move over summer, the NFL is back, primed for another season at the forefront of American pop culture." – Rocky Mountain News writer Clay Latimer (Rocky Mountain News, 9/8/05)

"It is the richest and most highly rated professional league in the United States and has become a major force in popular culture, with its imprint stamped on video games, music and fashion." – Washington Post writers Mark Maske and Leonard Shapiro (Washington Post, 9/8/05)

"I think the game in some ways sums up the American experience. I think a lot of people see their daily lives and the history of the country in the NFL because the game is also linked to the personality and attitude of the country. There's a high degree of teamwork, an emphasis on toughness," said Neal Pilson, former president of CBS Sports and now a sports TV consultant. (Washington Post, 9/8/05)

"The Super Bowl is the only event that can take over any city and stop everything that is going on. It's going to be nonstop action. It's going to be like no other event," said Robert Tuchman, President of TSE Sports & Entertainment, a New York-based event planner. (Detroit Free Press, 9/8/05)

"The NFL cuts across all demographics for an advertiser. More and more companies are realizing they can reach their core consumers by being involved with the NFL," said Reed Bergman, CEO of Playbook, Inc., a sports marketing firm. (Arizona Republic, 9/4/05)

"The NFL has a mass appeal that's just unprecedented. No one gets the masses of human beings to pay attention like they do," said Whitney Wagoner, industry analyst and instructor at Warsaw Sports Marketing Center at University of Oregon. (Arizona Republic, 9/4/05)

"As the old television universe disintegrates into hundreds of channels, and viewers shift time slots and skip commercials at will, the Super Bowl is one event that still puts the mass in mass marketing." (Wall Street Journal, 1/24/05)

"There is no more mainstream advertising vehicle in the United States than the Super Bowl." -- Matt Ferguson, Careerbuilder.com chief executive (Wall Street Journal, 1/17/05)

"[The NFL is] perfect for television, the bible of life in America. It's almost as if TV were invented for football" – San Francisco Chronicle columnist Ron Kroichick (San Francisco Chronicle, 9/12/04)

"The Super Bowl is bigger than television," said Ray Warren, managing director of Omnicom Group's OMD, typically the largest buyer of ad time which bought 20% of the game. "The game is a national holiday. It's the only place to put 100 million people in front of a commercial." (Advertising Age, 1/12/04)

"Anything with the NFL logo works. Any NFL programming succeeds." Chicago Sun-Times columnist Jay Mariotti on NFL Network, (ESPN's Around the Horn, 11/4/03)

"The NFL is the undisputed champion of American professional sports." (Orange County Register, 11/2/03)

"They understand that they're in the event and entertainment business," said David Carter, principal of the Los Angeles-based Sports Business Group. "It just so happens that what they're producing is a football game. They make every game a happening. They have managed to brilliantly weave in pop culture. Brands at that level that don't constantly refine their approach to business have someone catch up with them." (Orange County Register, 11/2/03)

Tom McGovern, director for sports marketing at OMD in New York, a unit of the Omnicom Group: "The beauty of the Super Bowl is that it hasn't been impacted by the erosion of viewership and ratings that has affected the rest of television. The ability to reach half the population at one time is still there." (New York Times, 11/3/03)

News Corp. President of Sales John Nesvig: "No product sells itself, but time on NFL games comes close." (Bloomberg News, 7/31)

"The NFL is the most recession-proof of major sports," said John Mansell, a senior analyst at market researcher Kagan World Media. "The American public has an insatiable appetite for football." (Bloomberg News, 7/31)

"The good thing about the NFL is that it covers all demographic groups," said Jon Boscia, Lincoln (Financial) National Corp. Chair & CEO (Philadelphia Inquirer, 8/3).

"The Super Bowl is uniquely American. For us, it is the biggest show in America," said Mark LaNeve, Cadillac general manager

Super Bowl exposure sparks a buzz that can generate positive word-of-mouth response among consumers for weeks. (San Diego Union Tribune)

"The Super Bowl is for the big and those just hitting it big," said Michael Sievert, AT&T Wireless CMO.

Football is our sport, and the Super Bowl is our national holiday.  
San Diego Union Tribune

For the one day that is Super Bowl Sunday, your color and ethnicity and religious beliefs and everything else that separates different factions of society is all forgotten. For those few hours, it's just the entire world watching our game. How cool is that?  
San Diego Union Tribune

The Super Bowl has become the closest thing sports has given us to a national holiday, the Great American Spectacle, the one Sunday every year when the country comes to a near halt and revolves around the NFL's championship game.  
San Diego Union Tribune

The NFL once again finds itself in a post-Super Bowl glow, knowing it's the king of American sports and the greatest made-for-television programming since the sitcom.  
Chicago Sun Times

The four biggest holiday celebrations in the United States are Thanksgiving, Christmas, New Year's Day and the Super Bowl.  
Washington Post



"The Super Bowl is by far the biggest sporting event in the country. It always has and always will be for the rest of my lifetime. The NCAA basketball tournament is a distant second." -- Michael Wilbon on ESPN's Pardon the Interruption

It's the sports championship game with the Roman numerals, which separates it from all other title games and conjures up images of gladiators ready to battle. It's the biggest single-day sporting event – the Super Bowl. And everybody wants a piece of the action.  
New York Newsday

Super Bowl XXXVII matches Oakland and Tampa Bay on Sunday at Qualcomm Stadium, where you will again witness America's devotion to a league and its game, one whose season peaks at winter's inception.  
San Diego Union Tribune

Super Bowl Sunday is not just about the game. Much of the fun is in the commercials, the halftime show, the parties and the chance to get together with friends to yell at the TV.  
Vibe

"Football is definitely America's favorite sport. The Super Bowl is a spectacle, a big event that we cherish."  
Bob Costas

"We have very few events that transcend most of the fragmenting parts of the world. The Super Bowl is one of them."  
Dr. Jay Coakley, professor of sociology at the University of Colorado at Colorado Springs

"It's interesting how important football, and specifically the Super Bowl, has become to our society."  
Dr. Jay Coakley

"People all over the world are attracted to events that endorse a sense of 'we-ness.' We love big events like the Super Bowl. We are constantly looking for a connection with each other based on the notion of nationhood. It is an opportunity for us to gather as one."  
Dr. Jay Coakley