

SOUTH FLORIDA  
02.07.10

February 2010

## **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. **Consumer Products**
- V. **Online/Fantasy Football/Video Games**
- VI. **Female Fans (And Children Too)**
- VII. **Super Bowl Popularity/Event Entertainment**
- VIII. **Youth Football**
- IX. **NFL Charities**

# I. TELEVISION

## Television Viewership

### IN 2009...

- NFL games averaged 16.6 million viewers – up 2 million viewers per game from last year and the NFL’s highest viewership average since 1990 (16.7 million). The viewership increase – 14 percent vs. 2008 – is the largest one-year jump ever.
- FOX, NBC, ESPN, and NFL Network each had their most watched NFL regular seasons ever while CBS had its best season since 1993.
- NFL regular-season games accounted for the 11 most-watched sporting events since Super Bowl XLIII.
- NFL games on broadcast TV (CBS, FOX and NBC) averaged 18.4 million viewers. On cable, NFL games on ESPN averaged 14.4 million viewers and 5.5 million viewers on NFL Network.
- Super Bowl XLIII is the most-watched program ever (151.6 million total viewers). The 18 most-watched programs in TV history are all Super Bowls.
- Super Bowl XLIII was watched in 230 countries and territories in 34 languages.

## **RECORD LOCAL RATINGS IN 2009**

NFL games topped the weekly local ratings a record 89 percent of the time in 2009 – topping the mark set last year (88 percent).

## ***COMPARATIVE RATINGS NOTES...***

### **NFL REGULAR SEASON vs. PRIME TIME BROADCAST TV**

NFL games on CBS, FOX and NBC averaged 18.4 million viewers – **116 percent higher than the average primetime viewership among the four major over-the-air networks** (8.5 million average on ABC, CBS, FOX, NBC).

## *...In Ratings & Viewership*

### **NFL HAS EDGE ON BROADCAST PRIMETIME**

#### *AVERAGE VIEWERS*

	<b><u>NFL on Broadcast</u></b>	<b><u>Broadcast Primetime</u></b>	<b><u>NFL % Advantage</u></b>
2002 Avg. Viewers	15.8 million	10.3 million	<b>52%</b>
2003 Avg. Viewers	15.5 million	9.9 million	<b>56%</b>
2004 Avg. Viewers	15.4 million	9.8 million	<b>57%</b>
2005 Avg. Viewers	15.6 million	9.7 million	<b>61%</b>
2006 Avg. Viewers	16.3 million	9.8 million	<b>66%</b>
2007 Avg. Viewers	16.6 million	8.7 million	<b>91%</b>
2008 Avg. Viewers	16.6 million	8.8 million	<b>89%</b>
2009 Avg. Viewers	18.4 million	8.5 million	<b>116%</b>

**Source: NFL & Nielsen Media Research. NFL regular season on Broadcast television (CBS, FOX & NBC...ABC prior to 2006). Broadcast primetime on BIG 4 networks (ABC, CBS, NBC & FOX) all programs, NFL regular season dates used.**

#### *AVERAGE RATINGS*

	<b><u>NFL on Broadcast</u></b>	<b><u>Broadcast Primetime</u></b>	<b><u>NFL % Advantage</u></b>
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>
2006 HH Rating	10.4	6.3	<b>65%</b>
2007 HH Rating	10.4	6.0	<b>86%</b>
2008 HH Rating	10.2	5.5	<b>85%</b>
2009 HH Rating	11.1	5.2	<b>113%</b>

**Source: NFL & Nielsen Media Research. NFL regular season on Broadcast television (CBS, FOX & NBC...ABC prior to 2006). Broadcast primetime on BIG 4 networks (ABC, CBS, NBC & FOX) all programs, NFL regular season dates used.**

## **NFL VS. ENTERTAINMENT PROPERTIES**

*Super Bowl and Conference Championships compared to entertainment properties.*

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

<u>Program</u>	<u>Rating</u>	<u>Avg. Viewers</u>
<b>Super Bowl XLIII (Feb. 2009)</b>	<b>42.0</b>	<b>98.7 million</b>
<b>NFC Championship Game (Jan. 2010)</b>	<b>30.6</b>	<b>57.9 million</b>
<b>AFC Championship Game (Jan. 2010)</b>	<b>26.3</b>	<b>46.9 million</b>
2009 Academy Awards, 2/22/09	20.6	36.3 million
2009 Grammy Awards, 2/8/09	11.2	19.1 million
2010 Golden Globes, 1/11/10	10.0	17.0 million
2009 Emmy Awards, 9/20/09	8.7	13.5 million

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

- **14 of the 15 Most-Watched Shows Last Fall Were NFL Games**

### **15 Most-Watched Shows of the Fall TV Season (9/7/09-1/3/10)**

<u>Program (Game)</u>	<u>Viewers</u>
<b>1. FOX Sunday National (mostly Vikings-Packers), 11/1</b>	<b>29.8 million</b>
<b>2. FOX Sunday National (mostly Falcons at Cowboys), 10/25</b>	<b>28.4 million</b>
<b>3. CBS Sunday National (Broncos-Eagles, Jets-Colts), 12/27</b>	<b>28.2 million</b>
<b>4. FOX Sunday National (mostly Cowboys-Giants), 12/6</b>	<b>27.8 million</b>
<b>5. FOX Sunday National (mostly Cowboys-Packers), 11/15</b>	<b>26.7 million</b>
<b>6. FOX Sunday National (mostly Eagles-Cowboys), 1/3/10</b>	<b>26.5 million</b>
<b>7. FOX Sunday National (Packers-Steelers, 49ers-Eagles), 12/20</b>	<b>25.8 million</b>
<b>8. CBS Thanksgiving Day (Raiders-Cowboys), 11/26</b>	<b>25.2 million</b>
<b>9. FOX Sunday National (mostly Redskins-Giants), 9/13</b>	<b>25.1 million</b>
<b>10. NBC Sunday Night Football (Giants-Cowboys), 9/20</b>	<b>24.8 million</b>
<b>11. CBS Sunday National (Chargers-Cowboys), 12/13</b>	<b>24.1 million</b>
12. 2010 Rose Bowl (Ohio State-Oregon), 1/1/10	24.0 million
<b>13. CBS Sunday National (mostly Titans-Patriots), 10/18</b>	<b>23.9 million</b>
<b>14. CBS Sunday National (mostly Steelers-Bears), 9/20</b>	<b>23.9 million</b>
<b>15. FOX Sunday National (mostly Bears-Vikings), 11/29</b>	<b>23.6 million</b>

Source: NFL, Nielsen Media Research, 9/7/09 – 1/3/10

## **NFL 2009 TV RECAP**

### ***MOST-WATCHED SEASON IN TWO DECADES***

### ***VIEWERSHIP GROWTH FOR ALL NFL TV PARTNERS***

### ***NFL GAMES: 14 of 15 MOST-WATCHED SHOWS THIS FALL & TOP 14 SHOWS ON CABLE***

### ***NFL VIEWERSHIP 116 PERCENT HIGHER THAN OTHER PRIMETIME PROGRAMMING***

Football fans across America tuned into NFL games in the largest numbers in two decades. According to Nielsen Media Research, the average 2009 regular-season game was watched by **16.6 million viewers** – up 2 million viewers per game from last year and the **NFL's highest viewership average since 1990** (16.7 million), before the explosion of viewer choice on television and online.

All NFL television partners shared in the viewership increase. FOX, NBC, ESPN, and NFL Network each had their most watched NFL regular seasons ever while CBS had its best season since 1993.

NFL regular-season games accounted for the **11 most-watched sporting events since Super Bowl XLIII** and ranked as **14 of the 15 most-watched TV shows among all programming last fall** (chart below).

NFL viewership on broadcast television continued to out-draw network primetime viewership. NFL games on CBS, FOX and NBC averaged 18.4 million viewers – **116 percent higher than the average primetime viewership among the four major over-the-air networks** (8.5 million average on ABC, CBS, FOX, NBC). That NFL advantage is up from an 89 percent edge last year and 57 percent edge five years ago.

**In local markets, NFL games were the highest-rated programs of the week a record 89 percent of the time – topping the mark set last season (88 percent)**. By comparison, NFL games topped local NFL market ratings 68 percent of the time five years ago (in 2004) and 55 percent of the time in 2001.

More 2009 NFL TV highlights (through the 2009 NFL regular season ending on 1/3/10):

- Nine NFL regular-season games were watched by 25 million viewers this season – up from 3 in 2008. NFL games were the only shows on TV to reach the 25 million mark in fall 2009.

- For the fall TV season, NFL games ranked at the top of weekly programs in average viewership with the top three, and five of the top 11 programs on network television (chart below). In addition, NFL games and NFL pregame and postgame shows accounted for the top 10 programs among men 18-49 (chart below).
- FOX's Sunday National Game (4:15 PM ET) was the most-watched weekly program with an average of 26.2 million viewers (chart below).
- CBS' Sunday National Game (4:15 PM ET) was the second-most-watched weekly program with an average of 22.2 million viewers (chart below).
- NBC Sunday Night Football was the most-watched weekly primetime program with an average of 19.3 million viewers (chart below).
- FOX's Nov. 1 Vikings-Packers game was the most-watched show of the fall broadcast season with 29.8 million viewers.
- NBC's Giants-Cowboys game on Sept. 20 was the most-watched Sunday Night Football game ever (24.8 million viewers).
- ESPN's Monday Night Football was the most-watched series on cable with an average of 14.4 million viewers. Monday Night Football accounted for the 14 most-watched cable programs this fall.
- ESPN's Packers-Vikings telecast on Oct. 5 is the most-watched show in cable history with 21.8 million viewers and ESPN's Patriots-Saints telecast on Nov. 30 is the second-most-watched show in cable history with 21.4 million viewers.
- NFL Network wrapped up its fourth season of *Thursday Night Football* with a record 5.5 million cable viewers tuning in on average – up 49 percent from last year.

Following are the top network television **weekly** programs nationally in average total viewers:

<b><i>Network</i></b>	
<u>Program</u>	<u>Viewers</u>
<b>1. FOX Sunday National Game</b>	<b>26.2 million</b>
<b>2. CBS Sunday National Game</b>	<b>22.2 million</b>
<b>3. NBC Sunday Night Football</b>	<b>19.3 million</b>
4. NCIS	19.1 million
5. Dancing with the Stars	17.5 million
<b>6. FOX Sunday Single</b>	<b>16.9 million</b>
7. Dancing with the Stars Results	15.5 million
8. NCIS: Los Angeles	15.5 million
9. The Mentalist	14.9 million
10. CSI	14.8 million
<b>11. CBS Sunday Single</b>	<b>14.7 million</b>

Following are last fall's top 10 weekly programs on television in a key demographic (avg. rating):

<b>Men 18-49</b>	
<u>Program</u>	<u>Rating</u>
1. FOX Sunday National Game	12.8
2. CBS Sunday National Game	10.4
3. NBC Sunday Night Football	10.1
4. FOX Sunday Single Game	8.4
5. ESPN Monday Night Football	8.3
6. CBS Sunday Single Game	7.3
7. NBC Sunday Night Pre-Kick	7.1
8. FOX Sunday Regional Game	7.0
9. CBS Sunday Regional Game	6.6
9. The OT (FOX NFL Postgame)	6.6

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, 9/7/09 – 1/3/10

Following are the 15 most-watched basic cable shows of the fall TV season:

<u>Program, Date</u>	<u>Viewers</u>
1. ESPN Monday Night Football (Packers-Vikings), 10/5	21.8 million
2. ESPN Monday Night Football (Patriots-Saints), 11/30	21.4 million
3. ESPN Monday Night Football (Steelers-Broncos), 11/9	16.0 million
4. ESPN Monday Night Football (Panthers-Cowboys), 9/28	15.7 million
5. ESPN Monday Night Football (Colts-Dolphins), 9/21	14.7 million
6. ESPN Monday Night Football (Bills-Patriots), 9/14	14.0 million
7. ESPN Monday Night Football (Ravens-Packers), 12/7	13.5 million
8. ESPN Monday Night Football (Broncos-Chargers), 10/19	13.5 million
9. ESPN Monday Night Football (Jets-Dolphins), 10/12	13.1 million
10. ESPN Monday Night Football (Cardinals-49ers), 12/14	13.1 million
11. ESPN Monday Night Football (Eagles-Redskins), 10/26	12.8 million
12. ESPN Monday Night Football (Falcons-Saints), 11/2	12.4 million
13. ESPN Monday Night Football (Titans-Texans), 11/23	12.1 million
14. ESPN Monday Night Football (Chargers-Raiders), 9/14	11.9 million
15. ESPN College Football (USC-Ohio State), 9/12	10.6 million

Source: NFL, Nielsen Media Research, 9/7/09 – 1/3/10

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

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

- The ten 2009 NFL Playoff games played this January (prior to Super Bowl XLIV on Feb. 7) averaged 36.0 million viewers -- **more than the combined** average viewership of the 2009 NBA Finals and 2009 World Series.

#### Most Recent Postseason Rating Averages, By Sport

<u>Sport</u>	<u>Average Rating</u>	<u>Avg. Viewers</u>
<b>2009 NFL Playoffs*</b>	<b>20.4</b>	<b>36.0 million</b>
2009 World Series	11.7	19.4 million
2009 Daytona 500	9.2	16.0 million
2009 NBA Finals	8.4	14.3 million

*\*does not include Super Bowl XLIV*

### **'09 WILD CARD PLAYOFFS MOST-WATCHED IN 15 YEARS**

Following a record-setting regular season, the NFL posted the most-watched Wild Card Weekend in 15 years. An average of 29.9 million fans watched NFL games last weekend, the most for an NFL Wild Card Weekend since the 1994 Wild Card games and a 16 percent increase from last season (25.8 million viewers).

Sunday's Green Bay Packers-Arizona Cardinals game on FOX drew 34.4 million viewers ranking as the most-watched Wild Card game in over a decade (Packers-49ers 1/3/99, 35.6 million viewers) and is the most-watched show of the current TV season.

Saturday night's Philadelphia Eagles-Dallas Cowboys game on NBC drew 32.1 million viewers to rank as the most-watched Saturday Wild Card game ever.

#### **2009 NFL Wild Card Playoffs**

<u>Date &amp; Time</u>	<u>Network (Game)</u>	<u>Viewers</u>
Sat. Jan. 9, 2010 -- 4:30 PM ET	NBC (Jets at Bengals)	25.0 million
Sat. Jan. 9, 2010 -- 8:00 PM ET	NBC (Eagles at Cowboys)	32.1 million
Sun. Jan. 10, 2010 -- 1:00 PM ET	CBS (Ravens at Patriots)	27.4 million
Sun. Jan. 10, 2010 -- 4:40 PM ET	FOX (Packers at Cardinals)	34.4 million
<b>WILD CARD WEEKEND</b>	<b>AVERAGE</b>	<b>29.9 million</b>

Source: NFL & Nielsen Media Research

## **'09 DIVISIONAL PLAYOFFS MOST WATCHED IN 16 YEARS**

Football fans across America continue to tune in to NFL games, resulting in the most watched Divisional Playoff weekend in 16 years. An average of 33.0 million fans watched NFL games last weekend, the most for an NFL Divisional Playoff weekend since January 1994 and a 15 percent increase from last season (28.8 million viewers).

### **2009 NFL Divisional Playoffs**

<u>Date &amp; Time</u>	<u>Network (Game)</u>	<u>Viewers</u>
Sat. Jan. 16, 2010 -- 4:30 PM ET	FOX (Cardinals at Saints)	27.9 million
Sat. Jan. 16, 2010 -- 8:00 PM ET	CBS (Ravens at Colts)	30.6 million
Sun. Jan. 17, 2010 -- 1:00 PM ET	FOX (Cowboys at Vikings)	37.7 million
Sun. Jan. 17, 2010 -- 4:40 PM ET	CBS (Jets at Chargers)	35.6 million
<b>DIVISIONAL WEEKEND</b>	<b>AVERAGE</b>	<b>33.0 million</b>

## ***MOST-WATCHED CONFERENCE CHAMPIONSHIP SUNDAY IN 28 YEARS***

The 2009 AFC & NFC Championship Games accounted for the most-watched Conference Championship Sunday in 28 years. An average of 52.9 million fans watched -- the most for an NFL Conference Championship Sunday since January 1982 and a 34 percent increase from last season (39.6 million viewers).

The Minnesota Vikings-New Orleans Saints NFC Championship Game on FOX drew 57.9 million viewers to rank as the most watched conference championship game since the 1981 NFC Championship Game featuring "The Catch" (Dallas-San Francisco on CBS on January 10, 1982, 68.7 million viewers) and the most watched non-Super Bowl program on television since the series finale of *Seinfeld* 12 years ago (76.3 million on May 14, 1998).

The New York Jets-Indianapolis Colts matchup on CBS drew 46.9 million viewers to rank as the most watched AFC Championship Game in 24 years (Patriots-Dolphins on NBC on January 12, 1986, 47.5 million).

## SUPER BOWL TV RATINGS HISTORY

<u>SUPER BOWL</u>	<u>Season</u>	<u>Date</u>	<u>NET</u>	<u>RATING</u>	<u>SH</u>	AVG HOMES (000)	TOTAL* VIEWERS P2+ (millions)	<u>TEAMS</u>
I	1966	Jan 15 1967	CBS	22.6	43	12,410	39.9	GB/Kansas City
I	1966	Jan 15 1967	NBC	18.5	36	10,160	35.6	GB/Kansas City
II	1967	Jan 14 1968	CBS	36.8	68	20,610	51.3	GB/Oakland
III	1968	Jan 12 1969	NBC	36.0	70	20,520	54.5	NY JETS/Balt
IV	1969	Jan 11 1970	CBS	39.4	69	23,050	59.2	KC/Minn
V	1970	Jan 17 1971	NBC	39.9	75	23,980	58.5	BALT/Dallas
VI	1971	Jan 16 1972	CBS	44.2	74	27,450	67.3	DALLAS/Miami
VII	1972	Jan 14 1973	NBC	42.7	72	27,670	67.7	MIAMI/Wash
VIII	1973	Jan 13 1974	CBS	41.6	73	27,540	63.2	MIAMI/Minn
IX	1974	Jan 12 1975	NBC	42.4	72	29,040	71.3	PITT/Minn
X	1975	Jan 18 1976	CBS	42.3	78	29,440	73.3	PITT/Dallas
XI	1976	Jan 09 1977	NBC	44.4	73	31,610	81.9	OAK/Minn
XII	1977	Jan 15 1978	CBS	47.2	67	34,410	102.0	DALLAS/Den
XIII	1978	Jan 21 1979	NBC	47.1	74	35,090	96.6	PITT/Dallas
XIV	1979	Jan 20 1980	CBS	46.3	67	35,330	97.8	PITT/LA Rams
XV	1980	Jan 25 1981	NBC	44.4	63	34,540	94.1	OAK/Phil
XVI	1981	Jan 24 1982	CBS	49.1	73	40,020	110.2	SF/Cin
XVII	1982	Jan 30 1983	NBC	48.6	69	40,480	109.0	WASH/Miami LA
XVIII	1983	Jan 22 1984	CBS	46.4	71	38,880	105.2	RAIDERS/Wash
XIX	1984	Jan 20 1985	ABC	46.4	63	39,390	115.9	SF/Miami CHI/New England
XX	1985	Jan 26 1986	NBC	48.3	70	41,490	127.1	NYG/Den
XXI	1986	Jan 25 1987	CBS	45.8	66	40,030	119.7	WASH/Denver
XXII	1987	Jan 31 1988	ABC	41.9	62	37,120	114.6	SF/Cin
XXIII	1988	Jan 22 1989	NBC	43.5	68	39,320	110.8	SF/Den
XXIV	1989	Jan 28 1990	CBS	39.0	63	35,920	109.0	NYG/Buff
XXV	1990	Jan 27 1991	ABC	41.9	63	39,010	112.1	WASH/Buff
XXVI	1991	Jan 26 1992	CBS	40.3	61	37,120	119.7	DALLAS/Buff
XXVII	1992	Jan 31 1993	NBC	45.1	66	41,990	133.4	DALLAS/Buff
XXVIII	1993	Jan 30 1994	NBC	45.5	66	42,860	134.8	SF/San Diego
XXIX	1994	Jan 29 1995	ABC	41.3	62	39,400	125.2	DALL/Pitt
XXX	1995	Jan 28 1996	NBC	46.0	68	44,110	138.5	GB/New England
XXXI	1996	Jan 26 1997	FOX	43.3	65	42,000	128.9	DEN/Green Bay
XXXII	1997	Jan 25 1998	NBC	44.5	67	43,630	133.4	DEN/Atl
XXXIII	1998	Jan 31 1999	FOX	40.2	61	39,992	129.2	STL/Tenn
XXXIV	1999	Jan 30 2000	ABC	43.3	63	43,618	132.0	BALT/NYG
XXXV	2000	Jan 28 2001	CBS	40.4	61	41,270	132.8	NE/St. Louis
XXXVI	2001	Feb 3 2002	FOX	40.4	61	42,664	133.0	TB/Oak
XXXVII	2002	Jan 26 2003	ABC	40.7	61	43,433	138.9	

XXXVIII	2003	Feb 1 2004	CBS	41.4	63	44,908	144.4	NE/Car
XXXIX	2004	Feb 6 2005	FOX	41.1	62	45,081	133.7	NE/Phil
XL	2005	Feb 5 2006	ABC	41.6	62	45,850	141.4	PITT/Seattle
XLI	2006	Feb 4 2007	CBS	42.6	64	47,480	139.8	INDY/Chi
XLII	2007	Feb 3 2008	FOX	43.1	65	48,655	148.3	NYG/NE
XLIII	2008	Feb 1 2009	NBC	42.0	64	48,139	151.6	AZ/Pitt

**RATING is a percentage of all TV Households watching the Super Bowl**

**SHARE is a percentage of all Households Using TV watching the Super Bowl**

**Super Bowl winner in ALL**

**CAPS**

**\* TA P2+ 1967-1992 calculated:HH TA x P2+ VPVH, 1993 to present pure**

**P2+TA**

**\*\* TA P2+ 1998-2006 calculated in NPower, and includes VCR adjustment in the calculation.**

## II. Popularity/Surveys

### **SURVEY SAYS:**

#### **THE HARRIS POLL: NFL CONTINUES 44-YEAR RUN AS MOST POPULAR SPORT**

##### ***Tops Next 3 Pro Sports Combined***

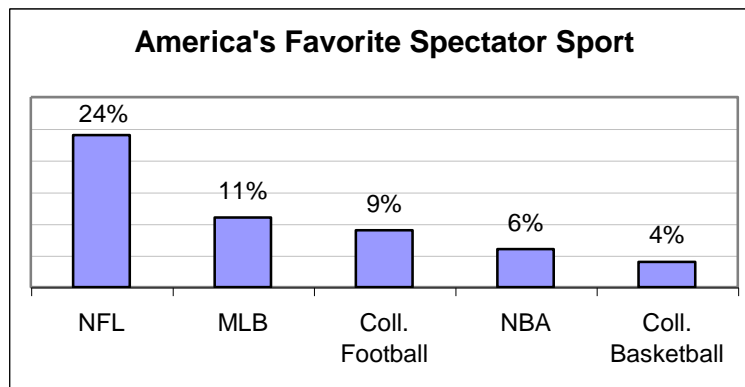
For more than four decades, according to The Harris Poll, the NFL has been the most popular sport in America. This year, professional football is the favorite sport of more people (31 percent) than the combined total of the next three professional sports – baseball (16 percent), auto racing (eight percent) and men's pro basketball (six percent).

In addition, pro football has gained in popularity more than any other sport since 1985...with a seven percent increase in popularity over those two decades (from 24 percent to 31 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. Following are the five most popular sports according The Harris Poll:

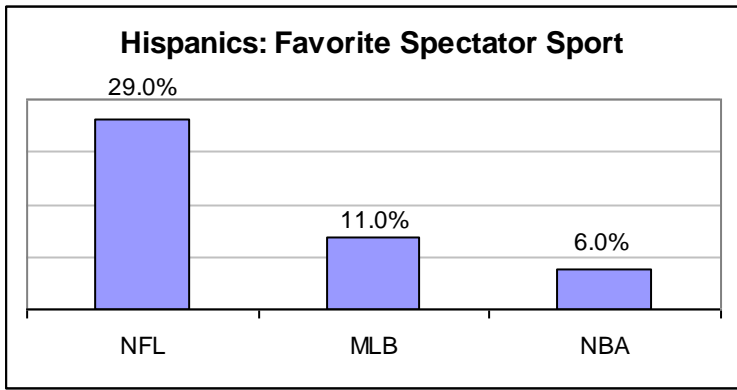
<u>Sport</u>	<u>Percent of Fans Citing as Favorite</u>
Pro Football	31%
Baseball	16%
College Football	12%
Auto Racing	8%
Men's Pro Basketball	6%

Source: The Harris Poll, January 2009

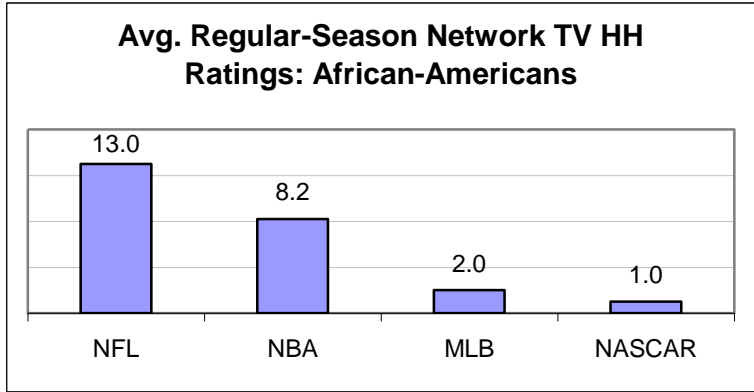
Following is a graphical look at the NFL's popularity:



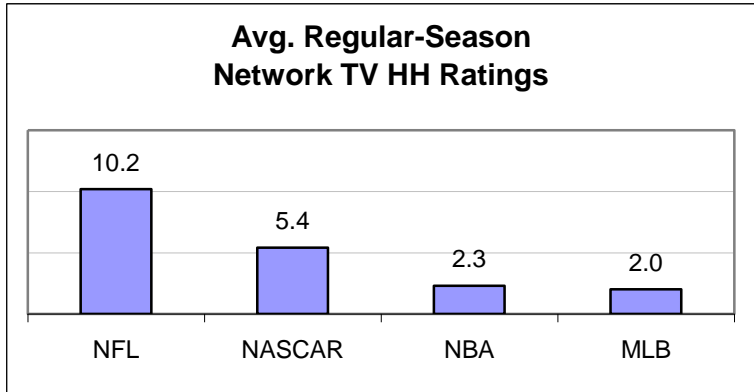
Source: 2008 ESPN Sports Poll



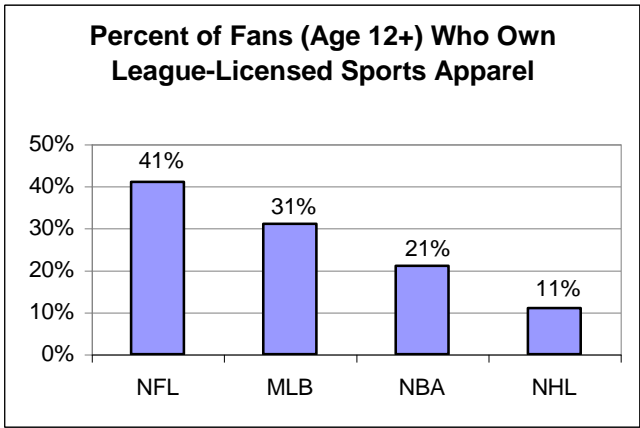
Source: 2008 ESPN Sports Poll



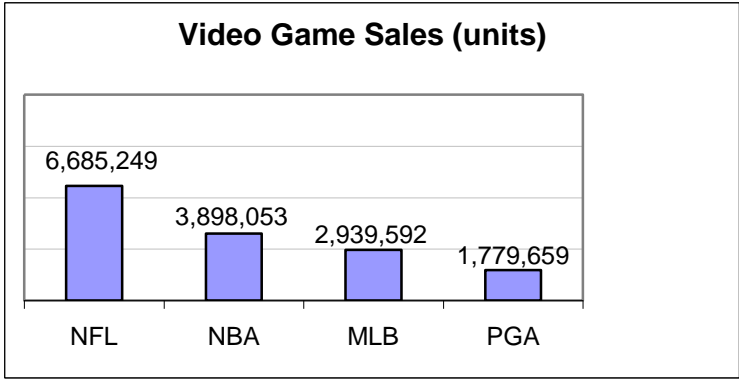
Source: NFL; Nielsen NPOWER 2008-09; Broadcast Only



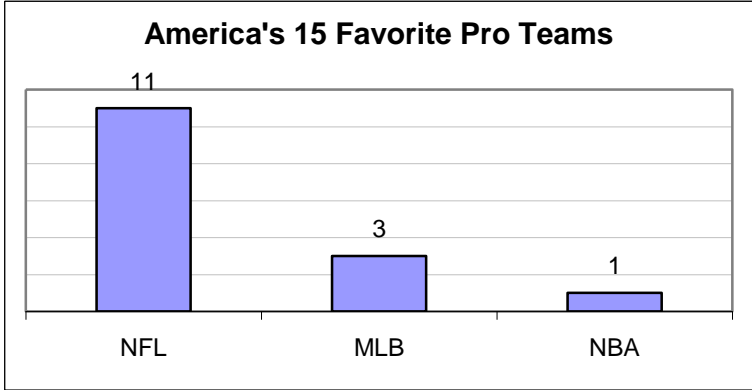
Source: NFL and Nielsen Media Research 2008-09; Broadcast



Source: 2008 ESPN Sports Poll



Source: The NPD Group (May 2008-April 2009)



Source: 2008 ESPN Sports Poll

### III. Attendance/Blackout Lifts

#### ATTENDANCE

#### NFL Records Third Highest Attendance in 2008

##### Total Paid Attendance (Regular Season + Postseason)

2009	16,651,126 (regular season only)
2008	17,862,814
2007	18,137,224 **NFL Record
2006	18,116,430
2005	17,814,708
2004	17,789,776
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

#### BLACKOUT LIFTS

##### SEASON % NUMBER LIFTED, NUMBER OF GAMES

2009	91%	234-256	
2008	96%	247-256	
2007	96%	246-256	
2006	97%	249-256	<b>**RECORD**</b> (entire week sold out 13 of 17 times)
2005	95%	244-256	(includes lifts for all Saints games)
2004	88%	226-256	
2003	90%	230-256	
2002	90%	230-256	
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	66%	147-224	
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. Consumer Products

### CONSUMER PRODUCTS

- *NFL has 7 of 10 most popular teams in terms of merchandise owned*

Among People Who Own Clothing with Pro Team Logos,  
They Own These Teams Most

<u>Team</u>	<u>Fans Owning Merchandise</u>
<i>Dallas Cowboys</i>	<i>9.8 Percent</i>
New York Yankees	8.1
Boston Red Sox	6.5
<i>Pittsburgh Steelers</i>	<i>6.4</i>
<i>Green Bay Packers</i>	<i>6.0</i>
<i>New England Patriots</i>	<i>4.9</i>
<i>Chicago Bears</i>	<i>4.5</i>
Chicago Cubs	4.1
<i>Denver Broncos</i>	<i>3.9</i>
<i>Oakland Raiders</i>	<i>3.6</i>

Source: ESPN Sports Poll, 2008 (Feb. 2009 poll)

## 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. 2009</u>	<u>Avg. Monthly Unique Users, 2009</u>
<b><i>NFL Internet Network</i></b>	<b><i>19.1 million</i></b>	<b><i>12.4 million</i></b>
MLB.com	7.6 million	8.9 million
NBA Internet Network	5.1 million	5.5 million
NASCAR	2.4 million	3.0 million
NHL Network	2.8 million	2.5 million

*Source: comScore Media Metrix, January-December 2009*

### **NFL TOPS AMONG FANTASY SPORTS**

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

- **NFL tops next seven sports combined.**

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

<b><i>NFL</i></b>	<b><i>60.4%</i></b>
MLB	19.5%
NBA	12.0%
Soccer	8.6%
NASCAR	5.7%
Coll. BB	4.6%
Golf	2.3%
NHL	1.3%

*Source: ESPN Sports Poll, Jan.-Oct. 2008*

### **TIME LOST AT WORK AS RESULT OF FANTASY FOOTBALL COULD COST EMPLOYERS AS MUCH AS \$1.1 BILLION PER WEEK**

According to a report by global outplacement consultancy Challenger, Gray & Christmas, Inc., as a result of time spent on fantasy football, the cost to employers for paying unproductive workers could be as high as **\$1.1 billion each week** of the National Football League's 17-week season.

*Source: Challenger, Gray & Christmas, Inc., August, 2007*

## VI. Female Fans (And Children Too)

### WOMEN ARE ENTHUSIASTIC NFL FANS

#### Super Bowl XLIII Had Most Female Viewers for Any Show in 15 Years

Super Bowl XLIII was watched by an average of 38.3 million women – the most since 38.6 million women watched the 1994 Winter Olympic figure skating competition featuring Nancy Kerrigan on Feb. 25, 1994.

The 38.3 million women watching Super Bowl XLIII also represents the third-largest female viewership since Nielsen Media Research began tracking the demographic in Sept. 1991. The top two shows among women: two nights of 1994 Winter Olympic figure skating featuring Nancy Kerrigan (40.9 million on Feb. 23, 1994; 38.6 million on Feb. 25, 1994).

#### **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).

#### **"WHICH SPORT IS YOUR FAVORITE?"**

<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).

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

- More **women** watched Super Bowl XLIII (71.0 million reach) than **total viewers** watched the 81st Annual Academy Awards in 2009 (67.6 million).

### **SUPER BOWL (2/1/09) versus ACADEMY AWARDS (2/22/09)**

**Total Oscars Audience: 67,608,477**

#### Among Total Females 2+

Super Bowl XLIII: 71,034,649

2009 Academy Awards: 40,326,226

**SB Advantage: +76%**

#### Among Total W18-34

Super Bowl XLIII: 16,330,956

2009 Academy Awards: 8,180,570

**SB Advantage: +100%**

#### Among Total W18-49

Super Bowl XLIII: 34,046,685

2009 Academy Awards: 18,074,048

**SB Advantage: +88%**

#### Among Total W25-54

Super Bowl XLIII: 33,011,838

2009 Academy Awards: 18,762,594

**SB Advantage: +76%**

Source: NFL & Nielsen Media Research, February 2009, Viewers based on Total Audience (TA%)

## **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%</b>
MLB	34%
College Football	26%
NBA	21%
College Basketball	14%
MLS	11%
NASCAR	10%
Extreme Sports	10%
Pro Wrestling	8%
NHL	8%

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

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

<b>NFL</b>	<b>26%</b>
MLB	18%
NBA	9%
MLS	8%
College Football	8%
College Basketball	5%
NHL	4%
Pro Golf	3%
NASCAR	3%

Source: ESPN Kids Poll, Jan.-Dec. 2008

## VII. Super Bowl Popularity/Event Entertainment

### SUPER BOWL FACTOIDS

- More people watched Super Bowl XLIII (**151.6 million viewers**) than voted in the 2008 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

The Boss scores! The new CD ("Working on a Dream") of Super Bowl XLIII halftime performers **BRUCE SPRINGSTEEN & THE E STREET BAND** debuted this week (2/1/09) at No. 1 on *Billboard's* Top 200 Albums list thanks to its exposure during the game. The CD has already sold 224,000 copies.

This week the group (**Tom Petty & the Heartbreakers**) finds itself at the summit of *Billboard's* Top Pop Catalog chart with its "Greatest Hits," which shot up 196 percent in the week following the Super Bowl with sales of 33,000, according to Nielsen SoundScan. The band's "Anthology: Through the Years" jumped 240 percent to 7,000, taking the No. 6 spot on the same chart.

But that's just the tip of the iceberg. Petty collects his biggest trophy this week for halftime show entry "Free Fallin'": The track shifted 63,000 digital copies, a gain of 305 percent, and bows at No. 10 on Hot Digital Songs. "I Won't Back Down," "American Girl" and "Runnin' Down a Dream," which made up the rest of Petty's halftime set, all registered similarly notable climbs in the digital realm (*REUTERS*, 2/16/08).

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).

## 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 \$175 million nonprofit foundation run by the NFL and the NFL Players Association to support youth development and ensure the future health of the game.

##### **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 \$200,000 are available for capital improvement projects
- 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 \$20 million to rebuild more than 150 athletic fields in more than 40 cities.

##### **NFL ATLAS and ATHENA High School Steroid Education Program:**

- To combat the use of steroids and human growth hormone at the high school level, the NFL Youth Football Fund supports Oregon Health and Science University's ATLAS and ATHENA educational training programs for implementation in high schools nationwide
- The NFL ATLAS and ATHENA program will reach 36,000 high school athletes and 1,200 coaches in 80 high schools during the 2008-2009 school year
- ATLAS and ATHENA are nationally-acclaimed, gender-specific programs designed to promote healthy living and reduce the use of steroids and other drugs among male and female high school athletes

##### **NFL FLAG Football:**

- More than 130,000 boys and girls ages 5-17 in all 32 NFL cities and throughout the country play in NFL FLAG football leagues.
- Leagues run year-round and are organized through local youth organizations and independent leagues.
- Requires minimal equipment and offers young players non-contact involvement with football. Registered leagues receive NFL team identified flag jerseys, flag belts and footballs.
- There are eight regional NFL FLAG tournaments held around the country during October and November.
- Winning teams from each regional tournament advance to the NFL FLAG National Tournament of Champions in January as part of the Pro Bowl celebration, which is televised from South Florida on ESPN and the NFL Network.
- It is also an international program, with leagues in Canada, Mexico, Japan, Europe and Asia.

### **NFL Girls Flag Football Program:**

- This initiative allows the NFL to assist female flag football players, ages 14-17, in developing flag football as a high school sport for females nationwide.
- The NFL identified the top ten US cities with the highest concentration of recreational girls flag football participation and selected one female player from each city to serve as a pioneer/ambassador for the program.
- Each "pioneer" will champion this initiative by working with their respective high school athletic directors to pilot a girls flag football program in each school.
- Participating cities included: Fort Wayne, IN; Peabody, MA; Las Vegas, NV; Atlanta, GA; Charlotte, NC; Levittown, PA; and Austin, TX.
- The NFL will help subsidize the program in the above-mentioned cities by providing flag football equipment (flag belts and footballs) as well as coaching and officiating manuals for every high school that agrees to pilot a girls' flag football program during the 2009-10 academic year.

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

- The NFL Pepsi Punt, Pass & Kick (PP&K) program is a national skills competition for boys and girls ages 8-15. Participants are given the opportunity to compete separately against their peers in punting, passing and place kicking.
- 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 country's largest youth sports participation programs and is also the oldest, dating back to 1961.

### **NFL High School Player Development Programs:**

- The NFL High School 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.

### **USA Football**

- USA Football serves as the national governing body for youth, high school and amateur football. The organization promotes youth participation in football as a means of promoting youth character development, citizenship and sportsmanship both on and off the field.
- USA Football also provides resources focused on youth league enhancement, coaching education, officiating development and health and safety awareness.

## **IX. NFL Charities**

### **NFL Charities' Mission:**

NFL Charities, founded in 1973, is a non-profit organization created by the member clubs of the National Football League to enable the teams to collectively make grants to charitable and worthwhile causes on the national level. Since its inception, NFL Charities has granted over \$110 million to more than 300 different organizations, and sustained a number of recognition awards on behalf of the NFL.

NFL Charities' primary funding categories include:

- Sports-related medical research studies
- Player foundation grants in support of the philanthropic work of current and former NFL players
- Youth health and fitness initiatives as well as educational programs with our national partners
- Supplementing the charitable activities of our 32 member clubs
- Financial assistance to former NFL players who are in need

### **Medical Research Grants**

NFL Charities allocates \$1.5 million annually in grants for medical research in areas including sports injury prevention, innovations in injury treatment, and other related issues that affect the health and performance of athletes.

### **Player Foundation Grants**

NFL Charities awards \$1 million in grants each year to further the charitable efforts of current and former NFL players who have established non-profit organizations of their own. In 2008, NFL Charities funded 89 player foundations. Each year, a select number of foundations who perform extraordinary charitable services are recognized with Player Impact Grant Awards and receive maximum funding.

### **Youth Health and Fitness**

A rise in obesity rates among today's youth as well as the decline of physical education programs in schools across the country has prompted the NFL to take a leadership role in the movement to get youngsters physically fit. In October 2007, the NFL launched Play 60, a national youth health and fitness campaign focused on increasing the health and wellness of young fans by encouraging them to be active for at least 60 minutes a day.

NFL Play 60 brings together the NFL's long-standing commitment to health and fitness with an impressive roster of partner organizations who all work to make the next generation active and healthy. In addition to its national reach through PSAs and online programs, Play 60 is also implemented at the grassroots level through NFL's in-school, after-school and team-based programs such as the Play 60 Challenge in partnership with the American Heart Association.

### **Youth Education Towns**

NFL Youth Education Towns (YETs) are education and recreation centers constructed in Super Bowl host cities that serve as a lasting legacy of each game. With each Super Bowl, the NFL donates \$1 million towards YET development in an underserved area of that city. Presently, there are 15 YETs operating in 12 cities, the most recent opening in the Pro Bowl host city of Honolulu in conjunction with the 2009 Pro Bowl.

NFL Charities allocates \$500,000 annually towards YET programming. Meeting the league-wide commitment to youth health and fitness, in 2008 these funds went to installing interactive video technology fitness systems in every YET.

## **Walter Payton NFL Man of the Year**

The prestigious Walter Payton NFL Man of the Year Award is unique among NFL honors. It is the only award that recognizes a player for outstanding community service activities as well as for excellence on the field. Renamed in 1999 after legendary running back Walter Payton, the award has been given annually since 1970. Past winners include many of the league's greatest players, 13 of whom are in the Pro Football Hall of Fame. The 2008 award was presented to Kurt Warner at Super Bowl XLIII.

## **Military Support/USO**

Over the past four decades, NFL stars like Johnny Unitas, Joe Namath, Franco Harris, Archie Manning, Jerome Bettis and Will Shields have visited troops on NFL-USO tours in Afghanistan, Bosnia, Iraq, Japan, Korea, Kuwait, and Somalia.

In March 2009, Minnesota Vikings defensive end Jared Allen, New York Giants linebacker Danny Clark, Arizona Cardinals wide receiver Larry Fitzgerald, and St. Louis Rams linebacker Will Witherspoon traveled to Iraq on a week-long goodwill tour.

In June-July 2009, five current and former head coaches launched a new tradition by spending the July 4th holiday with the troops overseas. Participating in the inaugural NFL-USO Coaches Tour were New York Giants coach Tom Coughlin, Tennessee Titans coach Jeff Fisher, Baltimore Ravens coach John Harbaugh, and former coaches Bill Cowher and Jon Gruden.

## **United Way**

The 2009 NFL season marks the 36th year of collaboration between the National Football League and the United Way. Together, the NFL and the United Way have changed the landscape of corporate/non-profit community partnerships.

During its long partnership, over 1,000 NFL-United Way television messages have aired during NFL games, making it the longest-running public service ad campaign in television history. These public service announcements reach more than 120 million viewers per week via airtime furnished by the NFL at no cost to the United Way. This year, in addition to working with United Way to promote active and healthy lifestyles for youth, the NFL will also partner with it on the new LIVE UNITED campaign.

## **Team Program Grants**

NFL Charities supports its member clubs' community initiatives by providing \$1.5 million in grants annually. The grant dollars go towards the national initiatives of the league that are implemented by the teams in their local markets. The team program grant money generally focuses on NFL Play 60 to help get youth active and healthy as well as other initiatives including breast cancer awareness and volunteerism.