



January 2007

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

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- 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

IN 2006...

- NFL games on broadcast TV (CBS, FOX and NBC) averaged 16.3 million viewers (up four percent from 2005). On cable, NFL games on ESPN averaged 12.3 million viewers (up 41 percent) and 4.1 million viewers on NFL Network.

LAST SEASON...

- Super Bowl XL is the second most-watched program ever (141.4 million total viewers). The 13 most-watched programs in TV history are all Super Bowls.
- Super Bowl XL was watched in record 234 countries and territories in a record 32 languages.
- Thirteen NFL games during the 2005 season had as many or more viewers than prime time's five most-watched May 2006 season/series finales.

INCREASED VIEWERSHIP ON ALL NFL TELEVISION PARTNERS

<u>Network</u>	<u>Average Viewers</u>	<u>Increase From 2005</u>
CBS	15.2 million	+1%
FOX	16.6 million	+5%
NBC	17.5 million	+7%*
ESPN	12.3 million	+41%**
NFL Network	4.1 million	--

Source: NFL, Nielsen Media Research

*compared to ABC MNF in 2005

**compared to ESPN SNF in 2005

RECORD LOCAL RATINGS IN 2006

NFL games were the top-ranked program locally a record 80 percent of the time – up from 69.3 percent in 2005 and surpassing the previous record of 73 percent set in 2003. That means that eight of 10 times the NFL game drew higher local ratings than Dancing with the Stars, CSI or any other popular TV show.

COMPARATIVE RATINGS NOTES...

NFL REGULAR SEASON vs. PRIME TIME BROADCAST TV

NFL games on CBS, FOX and NBC averaged 16.3 million viewers – **a record 66 percent higher than the average primetime viewership among the four major over-the-air networks** (9.8 million average on ABC, CBS, FOX, NBC).

By Widest Margin Ever....In Ratings & Viewership

NFL HAS EDGE ON BROADCAST PRIMETIME

AVERAGE RATINGS

	<u>NFL on Broadcast</u>	<u>Broadcast Primetime</u>	<u>NFL % Advantage</u>
1998 HH Rating	11.3	8.3	36%
1999 HH Rating	11.4	8.2	39%
2000 HH Rating	10.7	7.8	37%
2001 HH Rating	10.1	7.3	38%
2002 HH Rating	10.4	6.9	51%
2003 HH Rating	10.3	6.5	58%
2004 HH Rating	10.1	6.4	58%
2005 HH Rating	10.1	6.3	60%
2006 HH Rating	10.4	6.3	65%

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 VIEWERS

	<u>NFL on Broadcast</u>	<u>Broadcast Primetime</u>	<u>NFL % Advantage</u>
2002 Avg. Viewers	15.8 million	10.3 million	52%
2003 Avg. Viewers	15.5 million	9.9 million	56%
2004 Avg. Viewers	15.4 million	9.8 million	57%
2005 Avg. Viewers	15.6 million	9.7 million	61%
2006 Avg. Viewers	16.3 million	9.8 million	66%

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>
Super Bowl XL (Feb. 2006)	41.6	90.7 million
AFC Championship Game (Jan. 2007)	26.4	46.7 million
NFC Championship Game (Jan. 2007)	25.1	43.2 million
2006 Academy Awards	23.1	38.9 million
2007 Golden Globes	13.2	20.0 million
2006 Grammy Awards	10.9	17.0 million
2006 Emmy Awards	10.6	16.2 million

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

NFL 2006 TV RECAP

VIEWERSHIP INCREASES FOR ALL TV PARTNERS

MORE THAN 220 MILLION AMERICANS WATCHED NFL GAMES

NFL RATES RECORD 66 PERCENT HIGHER THAN OTHER PRIMETIME PROGRAMMING

NFL GAMES ARE 3 OF TOP 7 NETWORK PROGRAMS; TOP 7 AMONG MEN 18-49; TOP 16 CABLECASTS

Football fans across America continued to tune their televisions to NFL games in large and growing numbers in 2006. According to Nielsen Media Research, 222 million Americans (up from 195.8 million in 2005) – or approximately three-quarters of the U.S. population – watched NFL games in 2006; and all NFL TV partners experienced increases in viewership for their NFL games.

In 2006 – the first year of new television contracts featuring “flexible scheduling” and earlier start times for primetime games – viewership increased on all NFL TV partners for the first time since 2002.

Consider these additional end-of-season facts:

- 2006 NFL national games on NBC, CBS (Sunday national & Thanksgiving) and FOX (Sunday national & Thanksgiving) averaged a 12.1 rating which exceeds playoff broadcast averages for other sports: 2006 NBA Playoffs (3.8 rating) & NBA Finals (8.5 rating) on ABC; 2006 MLB Playoffs (6.0 rating) & 2006 World Series (10.1 rating) on FOX.
- NFL games account for 3 of the top 7 programs on network television this season (chart below). In addition, NFL games account for the top seven (and 9 of the top 10) programs among men 18-49 (chart below).
- ESPN NFL games accounted for the 16 most-watched basic cable programs in 2006 (chart below).
- NFL Network concluded its inaugural *Thursday and Saturday Night Football* package with each of its eight games ranking as the top-rated show of the day among all programs on cable networks. The games averaged a 5.4 cable rating and (including fans who watched locally over the air) 4.1 million viewers.

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

<u>Network</u>	
<u>Program</u>	<u>Viewers</u>
1. FOX Sunday National Game	21.8 million
2. Desperate Housewives	20.7 million
3. Dancing With The Stars	20.5 million
4. CBS Sunday National Game	19.5 million
5. Dancing With The Stars Results	19.0 million
6. CSI	18.8 million
7. NBC Sunday Night Football	17.0 million*
8. Grey's Anatomy	16.9 million
9. CSI: Miami	16.1 million
10. Deal Or No Deal	16.0 million

*does not include Kickoff or Christmas games

Following are this season's top 10 programs on network television in a key demographic (avg. rating):

<u>Men 18-49</u>	
<u>Program</u>	<u>Rating</u>
1. FOX Sunday National Game	11.3
2. CBS Sunday National Game	9.7
3. NBC Sunday Night Football	9.1
4. FOX Sunday Single Game	7.9
5. CBS Sunday Single Game	7.2
6. The OT (FOX NFL Postgame)	6.8
7. FOX Sunday Regional Game	6.4
8. Heroes	6.1
9. NBC Sunday Night Pre-Kick	5.9
10. CBS Sunday Regional Game	5.8

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, 9/7/06-12/31/06

Following are the 10 most-watched regular-season games in 2006:

<u>Date</u>	<u>Program (Game)</u>	<u>Viewers</u>
Dec. 3	FOX Sunday National (mostly Cowboys-Giants)	27.6 million
Nov. 26	FOX Sunday National (mostly Bears-Patriots)	24.2 million
Nov. 23	FOX Thanksgiving Day (Bucs-Cowboys)	23.8 million
Nov. 19	CBS Sunday National (mostly Colts-Cowboys)	23.4 million
Dec. 25	NBC Christmas Day (Eagles-Cowboys)	23.2 million
Sept. 10	FOX Sunday National (mostly Cowboys-Jaguars)	22.7 million
Sept. 10	NBC Sunday Night (Colts-Giants)	22.6 million
Oct. 8	FOX Sunday National (Cowboys-Eagles)	22.1 million
Oct. 29	CBS Sunday National (mostly Colts-Broncos)	21.97 million
Nov. 5	NBC Sunday Night (Colts-Patriots)	21.95 million

Source: NFL, Nielsen Media Research, 9/7/06-12/31/06

Following are the 10 most-watched programs on basic cable in 2006:

<u>Program, Date</u>	<u>Viewers</u>
1. ESPN Monday Night Football (Giants-Cowboys), 10/23	16.0 million
2. ESPN Monday Night Football (Falcons-Saints), 9/25	15.0 million
3. ESPN Monday Night Football (Bears-Cardinals), 10/16	14.23 million
4. ESPN Monday Night Football (Bengals-Colts), 12/18	14.22 million
5. ESPN Monday Night Football (Steelers-Jaguars), 9/18	13.3 million
6. ESPN Monday Night Football (Packers-Eagles), 10/2	12.9 million
7. ESPN Monday Night Football (Packers-Seahawks), 11/27	12.7 million
8. ESPN Monday Night Football (Vikings-Redskins), 9/11	12.6 million
9. ESPN Monday Night Football (Ravens-Broncos), 10/9	12.5 million
10. ESPN Monday Night Football (Patriots-Vikings), 10/30	11.9 million

Source: NFL, Nielsen Media Research, 9/7/06-12/31/06

...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>
2006 NFL Playoffs*	19.0
2006 World Series	10.1
2006 NBA Finals	8.5

**does not include Super Bowl XLI*

NFL Wild Card games ranked as 4 of the 6 most-watched programs that week

NFL playoff games accounted for 4 of the 6 most-watched programs on television that week. NBC programming between games on Saturday took an additional spot.

Most-Watched Shows on Television, Week of Jan. 1-7, 2007

<u>Program</u>	<u>Average Viewers</u>
1. FOX NFC Wild Card Playoff (Giants-Eagles)	29.7 million
2. NBC NFC Wild Card Playoff (Cowboys-Seahawks)	26.8 million
3. CSI	26.1 million
4. CBS AFC Wild Card Playoff (Jets-Patriots)	24.7 million
5. Rose Bowl (Michigan-USC)	24.0 million
6. NBC AFC Wild Card Playoff (Chiefs-Colts)	19.7 million
7. Desperate Housewives	18.7 million
8. NBC Wild Card Playoff Show – Between Games	17.5 million
9. Law & Order: SVU	15.2 million
10. Sugar Bowl (Notre Dame-LSU)	14.4 million

Source: NFL & Nielsen Media Research

NFL Divisional Playoffs ranked as 4 of the 5 most-watched programs last week

NFL playoff games accounted for 4 of the 5 most-watched programs on television last week.

Most-Watched Shows on Television, Week of Jan. 8-14, 2007

<u>Program</u>	<u>Average Viewers</u>
1. CBS AFC Divisional Playoff (Patriots-Chargers)	34.2 million
2. FOX NFC Divisional Playoff (Seahawks-Bears)	31.6 million
3. BCS Championship Game (Ohio State vs. Florida)	28.8 million
4. FOX NFC Divisional Playoff (Eagles-Saints)	27.4 million
5. CBS AFC Divisional Playoff (Colts-Ravens)	26.5 million
6. Grey's Anatomy	23.0 million
7. House	17.8 million
8. 60 Minutes	17.5 million
9. Desperate Housewives	16.8 million
10. CSI: Miami	16.0 million

Source: NFL & Nielsen Media Research

AFC & NFC CHAMPIONSHIP GAMES

- The AFC & NFC Championship Games are the two-most watched programs of the 2006-07 TV season (top 20 chart below through Jan. 21, 2007).
- The AFC Championship Game (Patriots-Colts) on CBS was watched by 46.7 million viewers (up 20% from 39.0 million for same game last year), making it the most watched non-Super Bowl programming since May 6, 2004 when 52.5 million people watched the series finale of *Friends*.
- The AFC Championship Game is the most-viewed AFC Championship game since January 12, 1986 when New England played Miami (on NBC). That game averaged 47.5 million viewers.
- The NFC Championship Game (Saints-Bears) on FOX averaged 43.2 million viewers (up 23% from 35.2 million for same game last year) and is the most-viewed NFC Championship since the January 1997 NFC Championship Game (Carolina - Green Bay). That game averaged 46.3 million viewers.

20 MOST- WATCHED PROGRAMS OF 2006-07 TV SEASON, 9/7/06-1/21/07

<u>Program</u>	<u>Average Viewers</u>
1. CBS AFC Championship Game (Patriots-Colts), 1/21/07	46.7 million
2. FOX NFC Championship Game (Saints-Bears), 1/21/07	43.2 million
3. American Idol-Tuesday (season premiere), 1/16/07	37.4 million
4. American Idol-Wednesday, 1/17/07	36.9 million
5. CBS AFC Divisional Playoff (Patriots-Chargers), 1/14/07	34.2 million
6. FOX NFC Divisional Playoff (Seahawks-Bears), 1/14/07	31.6 million
7. FOX NFC Wild Card Playoff (Giants-Eagles), 1/7/07	29.7 million
8. CBS AFC Championship Postgame Show, 1/21/07	29.2 million
9. BCS Championship Game (Ohio State vs. Florida), 1/8/07	28.8 million
10. FOX Sunday National (mostly Cowboys-Giants), 12/3/06	27.6 million
11. Dancing With The Stars -- Final Results, 11/15/06	27.5 million
12. FOX NFC Divisional Playoff (Eagles-Saints), 1/13/07	27.4 million
13. Dancing With The Stars -- Final Competition, 11/14/06	26.82 million
14. NBC NFC Wild Card Playoff (Cowboys-Seahawks) 1/6/07	26.77 million
15. CBS AFC Divisional Playoff (Colts-Ravens), 1/13/07	26.5 million
16. CSI, 1/4/07	26.2 million
17. Grey's Anatomy, 9/21/06 (Season Premiere)	25.4 million
18. CBS AFC Wild Card Playoff (Jets-Patriots) 1/7/07	24.7 million
19. FOX Sunday National (mostly Bears-Patriots) 11/26/06	24.2 million
20. CSI, 11/16/06	24.1 million

Source: NFL & Nielsen Media Research

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	NYG/Den
XXII	1987	Jan 31 1988	ABC	41.9	62	37,120	114.6	WASH/Denver
XXIII	1988	Jan 22 1989	NBC	43.5	68	39,320	110.8	SF/Cin
XXIV	1989	Jan 28 1990	CBS	39.0	63	35,920	109.0	SF/Den
XXV	1990	Jan 27 1991	ABC	41.9	63	39,010	112.1	NYG/Buff
XXVI	1991	Jan 26 1992	CBS	40.3	61	37,120	119.7	WASH/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	DALLAS/Buff
XXIX	1994	Jan 29 1995	ABC	41.3	62	39,400	125.2	SF/San Diego
XXX	1995	Jan 28 1996	NBC	46.0	68	44,110	138.5	DALL/Pitt
XXXI	1996	Jan 26 1997	FOX	43.3	65	42,000	128.9	GB/New England
XXXII	1997	Jan 25 1998	NBC	44.5	67	43,630	133.4	DEN/Green Bay
XXXIII	1998	Jan 31 1999	FOX	40.2	61	39,992	129.2	DEN/Atl
XXXIV	1999	Jan 30 2000	ABC	43.3	63	43,618	132.0	STL/Tenn
XXXV	2000	Jan 28 2001	CBS	40.4	61	41,270	132.8	BALT/NYG

XXXVI	2001	Feb 3 2002	FOX	40.4	61	42,664	133.0	NE/St. Louis
XXXVII	2002	Jan 26 2003	ABC	40.7	61	43,433	138.9	TB/Oak
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

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 42-YEAR RUN AS MOST POPULAR SPORT

Equals 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 nearly as many people (29 percent) as the combined total of the next three professional sports – baseball (14 percent), auto racing (nine percent) and men's pro basketball (seven percent).

In addition, pro football has gained in popularity more than any other sport over the past 20 years...with a five percent increase in popularity over those two decades (from 24 percent to 29 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	29%
Baseball	14%
College Football	13%
Auto Racing	9%
Men's Pro Basketball	7%

Source: The Harris Poll, January 2007

Favorite Sport to Watch

<i>Football</i>	34%
Baseball	12%
Basketball	12%
Auto Racing	5%
Ice Hockey	4%

Source: Gallup Poll, December 2005

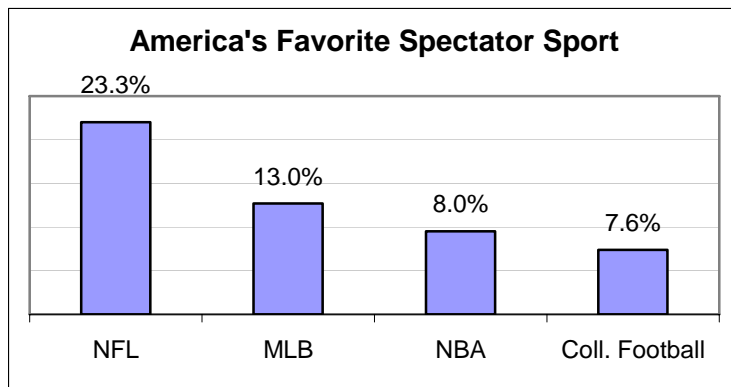
MOST POPULAR MERCHANDISE

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

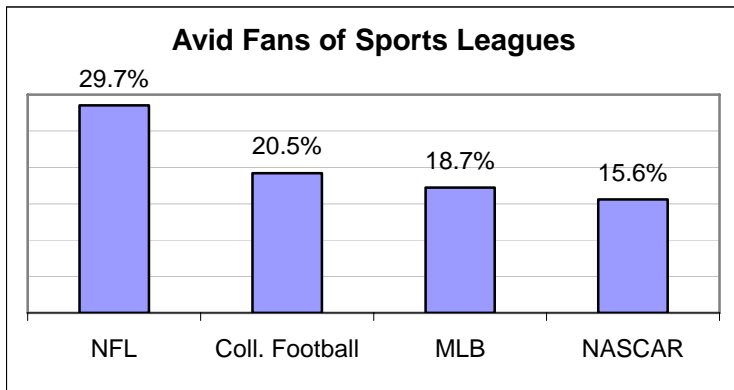
NFL	32%
MLB	16%
NBA	10%
NHL	4%

Source: ESPN Sports Poll, 2005

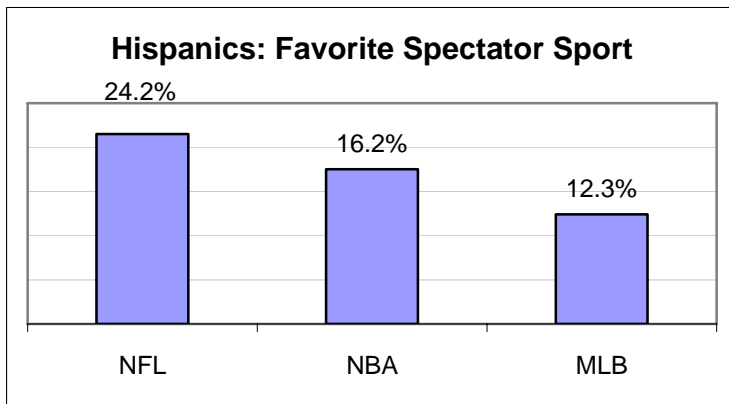
Following is a graphical look at the NFL's popularity:



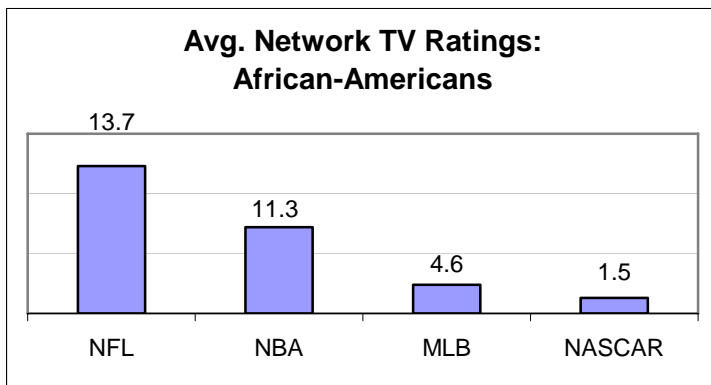
Source: 2005 ESPN Sports Poll



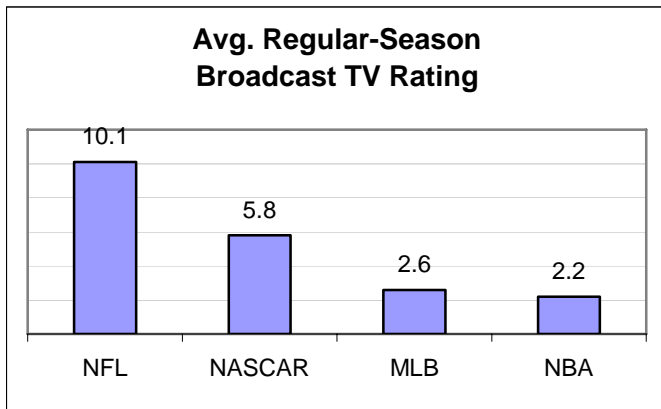
Source: 2005 ESPN Sports Poll



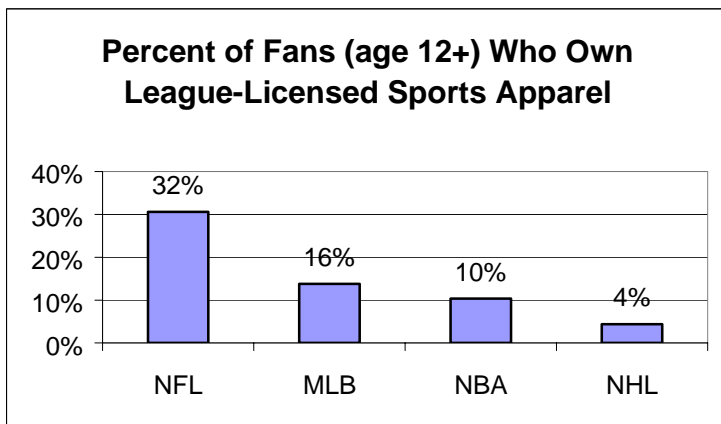
Source: 2005 ESPN Sports Poll



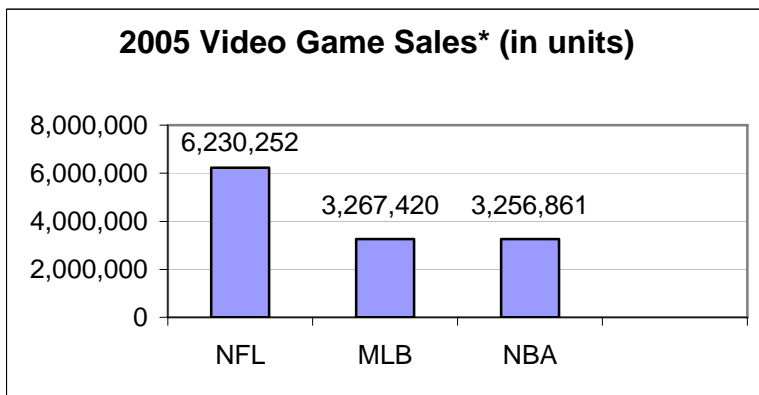
Source: NFL and Nielsen Media Research 2005-06



Source: NFL and Nielsen Media Research 2005-06

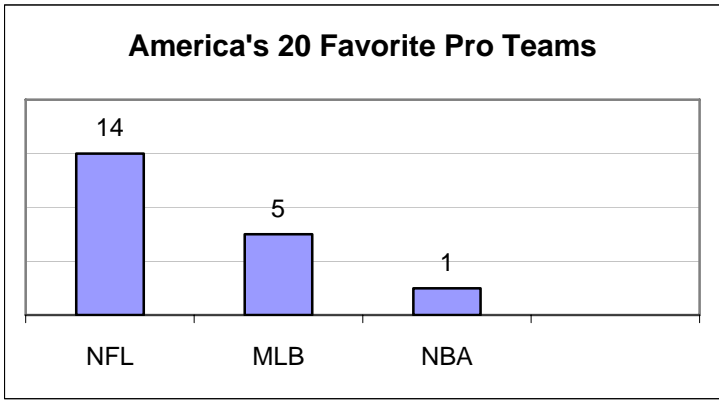


Source: 2005 ESPN Sports Poll



Source: TRST Data/ NPD Group

*Represents 2005 releases sold in 2005 calendar year



Source: 2005 ESPN Sports Poll

III. Attendance/Blackout Lifts

ATTENDANCE

NFL Attendance Sets Record in 2006

Total Paid Attendance (Regular Season + Postseason)

2006 17,340,879 **NFL Record (Regular Season)

2005 17,814,708 (Regular Season + Postseason)

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

**The 17,340,879 tickets sold to the NFL's 256 regular-season games in 2006 represented paid attendance at more than 90 percent of capacity.

Record For Average Attendance Also Set in 2006...

Paid attendance for NFL regular-season games set a record for the fourth consecutive year, increasing in 2006 to an all-time mark of 67,738 per game. The previous record was set in 2005 when an average of 66,455 tickets per game was sold for NFL regular-season games.

BLACKOUT LIFTS

SEASON % NUMBER LIFTED, NUMBER OF GAMES

2006 97% 249-256 **RECORD (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 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)

September 2006: NFL signs 5-year extension with **Motorola**

October 2006: NFL signs 2-year sponsorship deal with **State Farm**

January 2007: NFL signs multi-year sponsorship deal with **The Home Depot**

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 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>10.6 Percent</i>
New York Yankees	8.0
<i>Green Bay Packers</i>	<i>7.7</i>
<i>Pittsburgh Steelers</i>	<i>7.3</i>
<i>Oakland Raiders</i>	<i>5.9</i>
Los Angeles Lakers	5.8
Boston Red Sox	5.4
<i>Philadelphia Eagles</i>	<i>5.2</i>
<i>New England Patriots</i>	<i>5.1</i>
<i>San Francisco 49ers</i>	<i>4.2</i>

Source: ESPN Sports Poll, 2005

NFL Video Games: Top Competition

Top console and handheld games of 2006:

- 1. Madden NFL 07 (PS2), Electronic Arts, 2.8 million sold**
- New Super Mario Brothers (NDS), Nintendo, 2.0 million sold
- Gears of War (360), Microsoft, 1.8 million sold
- Kingdom Hearts II (PS2), Square Enix, 1.7 million sold
- Guitar Hero 2 (PS2), Activision, 1.3 million sold
- Final Fantasy XII (PS2), Square Enix, 1.3 million sold
- Brain Age: Train Your Brain (NDS), Nintendo, 1.1 million sold
- 7. Madden NFL 07 (360), Electronic Arts, 1.1 million sold**
- Tom Clancy's Graw (360), Ubisoft, 1.0 million sold
- NCAA Football 07 (PS2), Electronic Arts, 1.0 million sold

Source: NPD, 1/2007

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. 2006</u>	<u>Avg. Monthly Unique Users, 2006</u>
<i>NFL Internet Network</i>	<i>15.7 million</i>	<i>11.4 million</i>
MLB.com	7.3 million	8.8 million
NBA Internet Network	4.1 million	4.5 million
NASCAR	3.3 million	3.7 million
NHL Network	2.3 million	2.0 million

Source: comScore Media Metrix, January-December 2006

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?

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

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

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. on August 16, 2006, 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, 2006

Fantasy Football Consumer – Demographic

The typical fantasy consumer has played for nine years and competes in an average of six contests or leagues for various sports throughout the year. These educated professionals live in suburban areas and spend an average of almost \$500 annually on their magazines, online information, contests and leagues, according to the Fantasy Sports Trade Association.

Source: *USA Today*, Sept. 5, 2006

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>
NFL	Sept. 2004	7.8 million
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)

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).

"WHICH SPORT IS YOUR FAVORITE?"		
RK	SPORT	U.S. WOMEN
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 XL this year (40.0 million) than **total viewers** watched the 2006 Academy Awards (38.9 million).

Following is a demographic breakdown of female viewers:

Among Total Females Ages 2+

Super Bowl XL: 40,009,000
2006 Academy Awards: 23,910,000
SB Advantage: +67%

Among Women 18-34

Super Bowl XL: 8,843,000
2006 Academy Awards: 4,638,000
SB Advantage: +91%

Among Women 18-49

Super Bowl XL: 19,889,000
2006 Academy Awards: 10,608,000
SB Advantage: +87%

Among Women 25-54

Super Bowl XL: 20,212,000
2006 Academy Awards: 11,432,000
SB Advantage: +77%

Source: NFL & Nielsen Media Research, 3/2006

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:

NFL	37%
MLB	27%
NBA	23%
College Football	19%
NASCAR	13%
College Basketball	12%
NHL	10%
Extreme Sports	10%
Pro Wrestling	7%
MLS	6%

Source: ESPN Sports Poll, Jan.-June 2006

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:

NFL	73.6%
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 XL (**141.4 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).

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

"Today's world will not shrink the Super Bowl, but it has shrunk the stature of conceivable competitors – and the will of advertisers to match event-TV with event-ads as they do in the first week of February." – (Business Week, 1/15/07)

"No competitive endeavor, not even women's figure skating once every four Februarys, can overtake the NFL Playoffs." – (Washington Post, 1/9/07)

"In an age of limitless distractions and short attention spans, the seemingly endless desire for anything pertaining to professional football has reached obsessive heights...used to be people went to the movies to escape reality, to be entertained for a few hours. Now they watch football." – (Seattle Post-Intelligencer, 9/19/06)

"According to *USA Today*, ticket sales for movies in the U.S. declined sharply on NFL Kickoff Weekend, falling 45% from the previous weekend and 30% from the same weekend last year. "The opening weekend of the National Football League season typically is a tough one for studios," the newspaper wrote." (USA Today, 9/11/06)

"We are Bored Sports Nation. Other than football, nothing can keep our attention" – (Philadelphia Daily News, 2/17/06)

"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