

CERC Super Bowl 48 Study

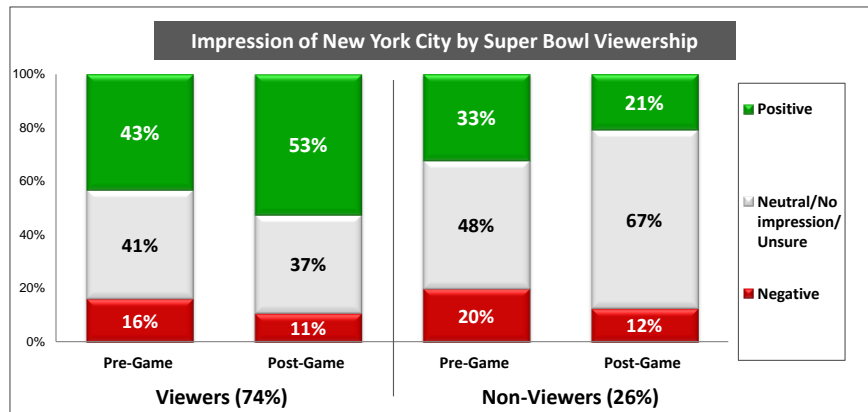
Thursday, February 9, 2014

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New York City Scores Big In Super Bowl Sweepstakes

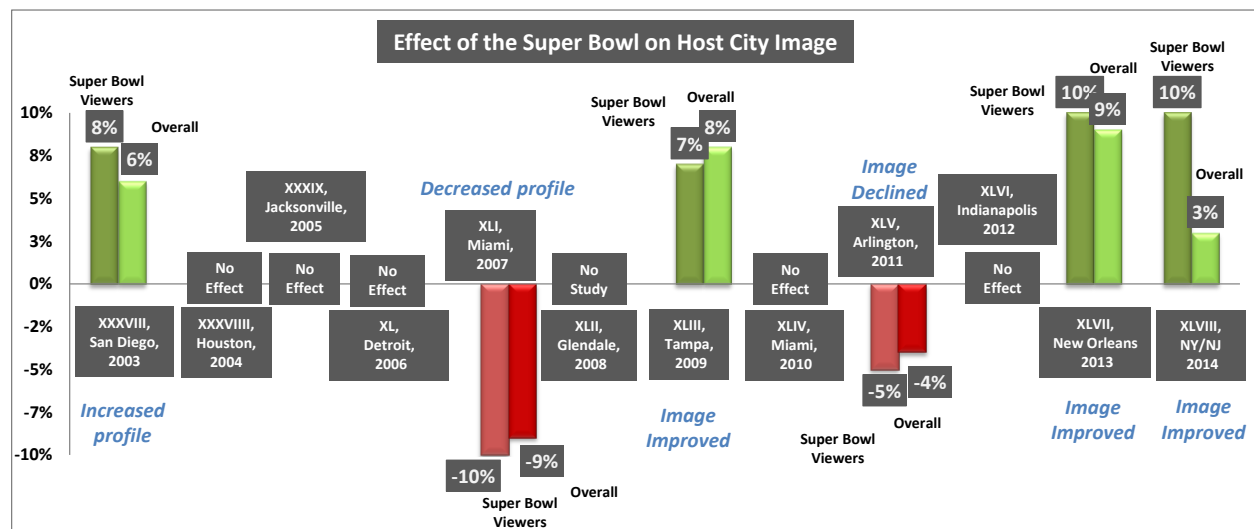
America Open to More Cold Weather Super Bowls

New York City won a victory despite neither of its namesake football teams being in Super Bowl 48. The City was fairly popular before the game, but after a well-hosted and problem-free game, favorable impressions improved to 44% and negative impressions sank to only 11%. It's clear that the game itself produced the more positive vibes: it was the attitudes of those who actually watched the Super Bowl that improved.



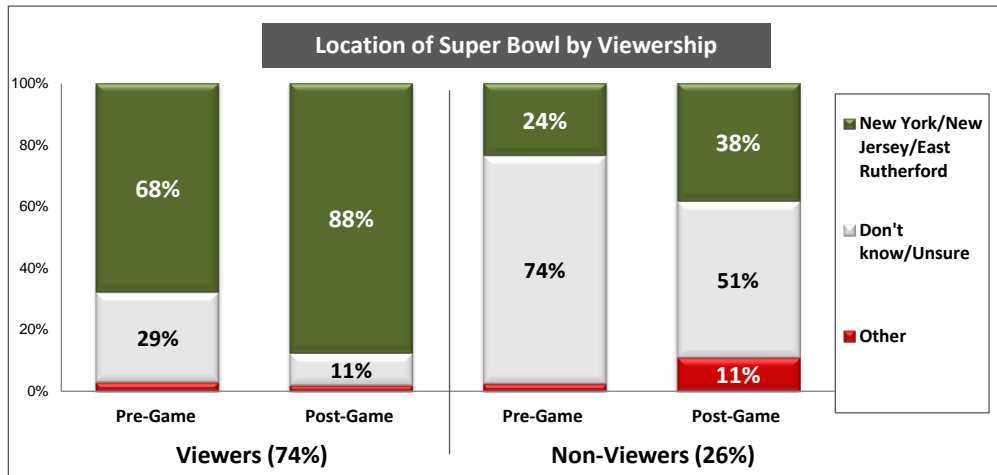
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Competitive Edge has found that the Super Bowl has significantly increased the popularity of its host cities before. San Diego, Tampa and New Orleans have all benefitted from hosting the big game. On the other hand, Miami and Arlington sank in the eyes of Americans after hosting weather-marred Super Bowls. About half the Super Bowls do not affect the host, as was the case this year for East Rutherford, New Jersey, home of MetLife Stadium. East Rutherford was -- and is still -- barely a blip on America's radar. Almost 9 out of 10 Americans have no impression of the city that was the actual site of Super Bowl 48.



New York mainly generated its new fans from male viewers living in cold weather states, as well as Americans who consider themselves to be big football fans. This suggests viewers paying closer attention produced more of a pay-off for New York than those who were less invested in the game.

Prior to the game most Americans (58%) had at least a pretty good idea of where the Super Bowl would be played. Twenty-eight percent said it would be played in New Jersey, 21% gave the



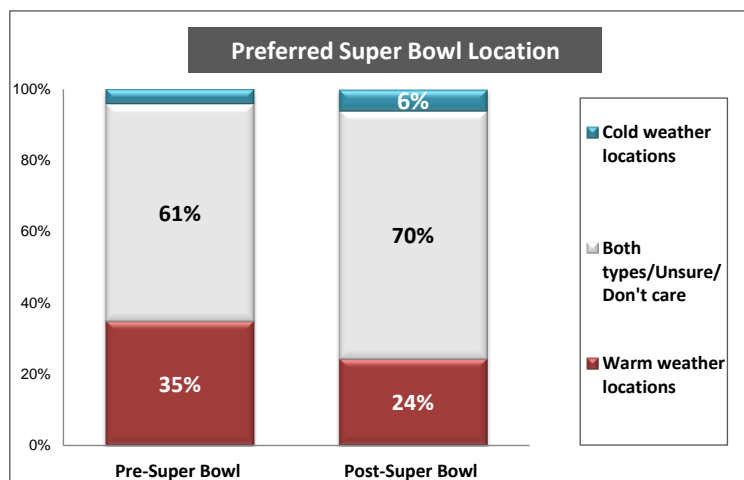
answer as New York, and another 8% actually mentioned East Rutherford as the location. This put the NY/NJ area far ahead of last year's host, New Orleans, in terms of recognition. In 2013, only 40% knew the game was to be played in Louisiana's Crescent City. For the host region, this was a very well-branded Super Bowl.

Importantly, those watching the game were treated to 16 images and mentions of the area hosting the game. Viewers were exposed to "New York/New Jersey" through in-stadium displays four times, multiple bumper shots showed the Manhattan skyline and Statue of Liberty, and Joe Buck talked about "local artist Bruce Springsteen from Freehold, New Jersey." Even NFL Commissioner Roger Goodell got into the act early in the post-game ceremony saying "let me give a shout out to New York and New Jersey."

This in-game activity led to even greater awareness of where the game was played and contributed to New York's popularity spike.

More Cold Weather Super Bowls?

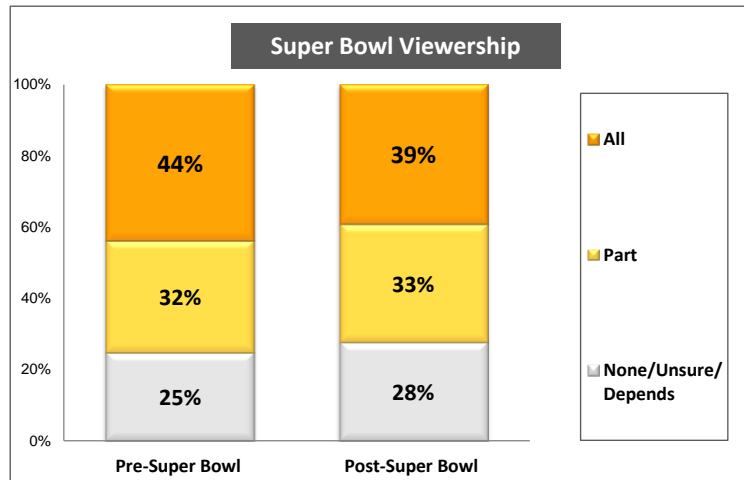
Americans value fairness and it's no different when it comes to where the Super Bowl is played. Before this year's game, 54% believed Super Bowls should be played in both warm and cold weather locations about as often. But those who watched the game -- especially those in rural areas -- were impressed by a pleasantly brisk evening and the lack of snow on the ground, so this Super Bowl increased support for



future cold weather Super Bowls. Casual NFL fans were also more likely to change their minds after the big game. Overall, the percentage of Americans who want the League to stick only with warm locations dropped from 35% to 24%. The lone group which expressed a backlash to the idea: residents of California and Nevada.

Viewership

Three-quarters of adult Americans said they planned to watch Super Bowl 48 this year, so the stage was set for it to break previous viewership records. Last year only 65% said they would watch the big game before it was played in New Orleans between the Ravens and the 49ers. While the Seattle Seahawks took a commanding lead and basically put the game away before halftime, that did not significantly dampen viewership.

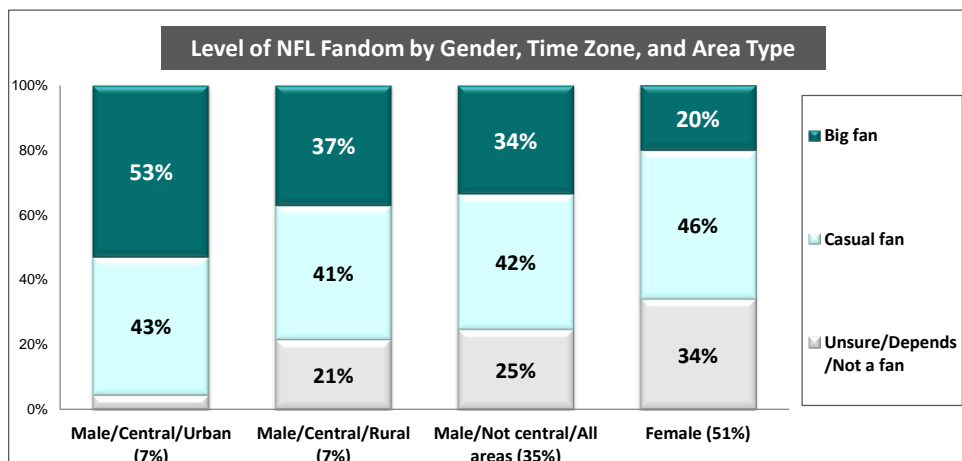


Viewership was highest among residents of the mid-Atlantic states, which includes co-hosts New York and New Jersey. In that entire region, 86% tuned into the game.

What does Fandom Look Like?

Twenty-eight percent of American adults categorize themselves as “big fans” of NFL football and another 44% regard themselves as casual fans. The NFL itself had a good year, as the percentage of fans grew significantly by 7% over the last year.

The League continues to draw in more men than women. While there are a lot of female fans, particularly between the ages of 37 to 48, more men generally follow the sport. The most rabid fan can be found among men in the urban centers of the central time zone. Within this segment of the population, 53% are big NFL fans and only 4% categorize themselves as non-fans.



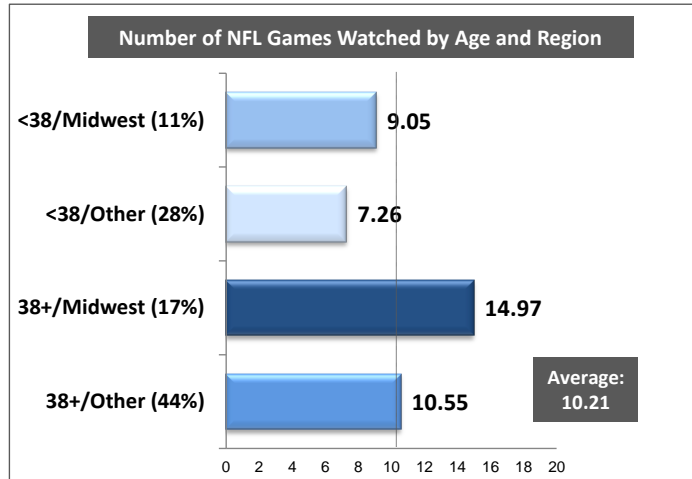
Fan Engagement

When it comes to watching football, American tastes run the gamut. Twenty-six percent shut the game out entirely and have watched no games this past season. On the other hand, 14% watched more than 20 games. That leaves most Americans watching between 1 to 20 games during last season, with the average being 10.2.

Some of the highest rates of fan engagement occur among mid-westerners who are 38 or older. This segment of the population watched, on average, 15 games during the just concluded season.

Interestingly, game attendance and viewing has little to do with income or with the number of teams one has in their state. For instance, three NFL teams call California home, but the average Golden State resident attended or watched only 7.9

games last season. Residents of mid-western states like Illinois, Minnesota, Indiana and Wisconsin, each of which have only one team, averaged 10.4, 15.0, 16.4 and 19.8 games, respectively.



Founded in 1987, Competitive Edge Research & Communication (CERC) is a national public opinion research firm specializing in civic, political and public affairs polling. Its annual Super Bowl study is conducted as part of CERC's on-going civic research. Competitive Edge conducts pre-game and post-game surveys using random digit dial sampling among landline and cell phone-only households with a total sample size of approximately 1,000 English-speaking adults in the United States. Survey results following the Super Bowl are compared to those from prior to the game in order to measure how the game influences the nation's impression of the host city.