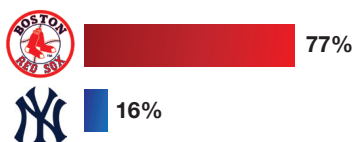


The Politics of Sports Fans

When Massachusetts Senate candidate Martha Coakley suggested in a radio interview that Curt Schilling had played for the Yankees instead of the Red Sox, her gaffe was doubly costly because: (1) the Democratic stronghold of Boston is the number one baseball market in the country with 77% of high turnout voters following the Sox on TV and radio; and (2) baseball fans are more likely to vote, with 60% of fans saying they always vote in statewide elections compared to just 50% of all adults. In a closer election, the Coakley-Schilling affair could have been an even bigger deal.

Boston media market:
Percent of high turnout voters following
teams on television or radio



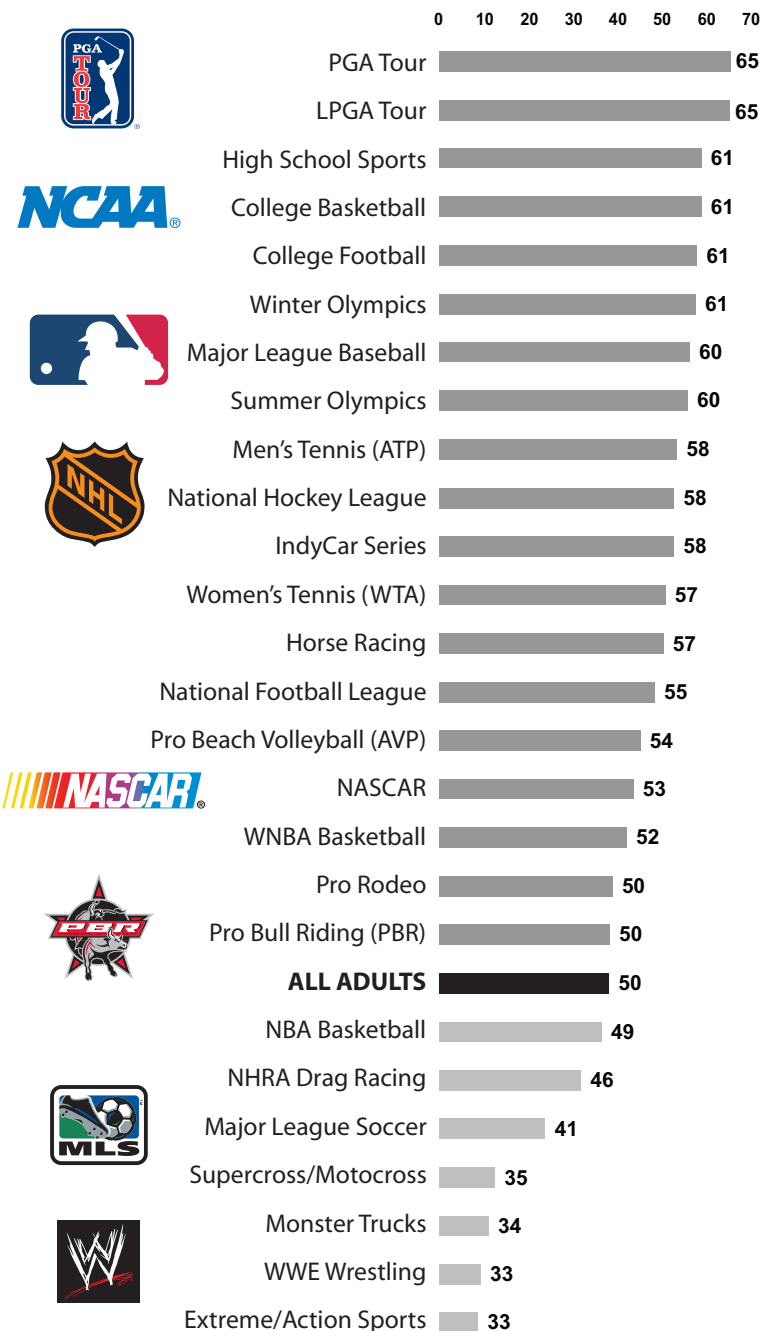
Sports Fans are High Turnout Voters

Some call politics a sport, and sports fans seem to agree. Sports fans are more likely to be interested in politics and more likely to vote than non-fans, according to our research. The graph at the right shows the percent of fans for twenty-six sports who say they “always” vote in statewide elections. Fans of nineteen sports vote at rates above the 50% national average, while only seven sports score below.

Most likely to be voters are those who are “very interested” in the PGA or the LPGA tours – 65% of these golf fans say they always vote in statewide elections. College sports are another favorite of higher turnout voters, with basketball in the spring and football in the fall campaign season. (See the “The Year In Sports” inside.) The fan bases of golf and college sports are older, have higher incomes and are better educated, which means they are also more likely to vote.

Percent of Sport Fans Who Vote

Among adults who are “very interested” in the PGA, 65% report that they always vote in statewide elections. Among all adults, 50% report always voting.



SOURCE: NMRPP analysis of Scarborough Research, Multi-Market Study, Release 2 2009. Survey period Aug. 2008 – Sept. 2009; N = 214,751 U.S. adults.

At the other end of the turnout spectrum are “performance sports” favored by younger adults who are less likely to vote. These include: “extreme” sports, professional wrestling, monster trucks, and motorcycle sports. Professional soccer is another low turnout sport because of its large fan base of Hispanics, who are less likely to vote than non-Hispanic Americans.

Hard-to-Find Republicans Are Reached with Sports

Our media research reveals that Democratic voters watch more television overall than Republicans and swing voters. We call this the “GRP Gap.” The audiences of most television program formats skew Democratic, as illustrated in the top bubble graph in the insert (Bubble A.) Of twenty-two television program formats, nineteen of them have audiences that are more Democratic than the adult population as a whole. Daytime talk shows (bubble on far left) have the most Democratic audiences.

The “GRP Gap” means that Democratic advertisers have more program choices and less expensive dayparts available to reach their base target voters. Republican campaigns have to work harder to reach their voters and, for our firm’s Republican clients, sports can be a very good place to find them.

Partisanship, Voting and Sports

The sports audience overall skews Republican and high turnout. Of the twenty-six sports profiled in bubble B (insert), fourteen of them have fan bases that are more Republican and more likely to vote than the average adult. The relative sizes of the individual bubbles are proportionate to the number of American adults who say they are “very interested” in the sport – larger bubbles mean more fans.

Presidents and politicians of both parties have been known to enjoy a round or two, but golf fans nationally are more likely to be Republicans than Democrats. The fan base that became a political cliché – NASCAR – also skews Republican, but stock car fans are less likely to vote.

College football fans are more Republican and more likely to vote than NFL fans. The same is true for college basketball versus the NBA, with pro fans significantly more Democratic and less likely to vote than college basketball fans.

Sports Reaches Opinion Leaders

Sports programming is also an effective way to reach opinion leaders. Our research based Influence Index model identifies the 10% of Americans who are opinion elites based on behavioral characteristics such

as political and charitable giving, volunteerism, news consumption, and other behaviors.

Elites are only 10% of the adult population, but elites account for nearly 20% of the audiences for golf, tennis, and college sports. Elite fans of golf and college sports are more likely to be Republicans, while elites fans of tennis are more likely to be Democrats.

More Live Viewers, Less DVR Ad Skipping

Sports fans are more attentive and engaged than viewers of most other program formats, and most fans prefer watching sports events live rather than time-shifted on a DVR. This means that political or issue advertising in a sports event is less susceptible to ad-skipping during DVR playback.

The table above shows DVR, time-shifted viewing for several program genres in 2009 as estimated by Nielsen. Reality and talent competitions (e.g. “American Idol”) have the highest percentages of time-shifted viewing, averaging nearly 19% of total viewing. By comparison, time-shifted viewing accounts for only 5% of sports event viewing and 2.5% of sports news viewing.

Nationally, around 40% of likely voters now have a DVR in the household, and the percentage will continue to grow.

	Time-Shifted Viewing as Pct. of Total Viewing
Talent/Reality	18.6%
Drama	12.9%
Comedy/Variety	11.4%
Soap Operas	10.5%
Sporting Events	4.6%
Sporting News	2.5%

Like Politics, Sports is Local

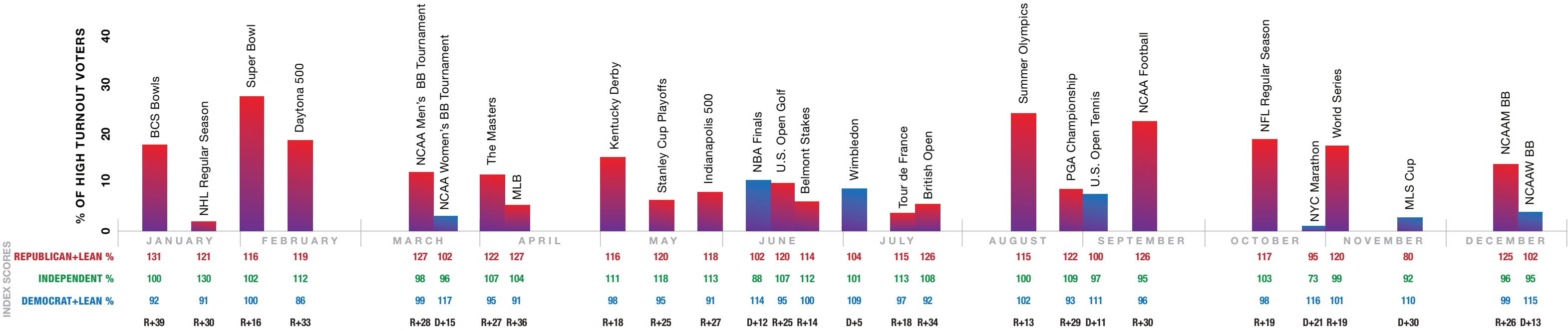
The findings described in this paper are based on national data, but there are significant regional and local variations in voters’ sports preferences to be considered when planning sports as part of a media campaign.

For example, fourteen percent of high turnout voters nationally say they are “very interested” in college basketball. But interest is much higher in Kentucky where fans follow the University of Kentucky and the University of Louisville. Louisville is the top college hoops market with 51% of likely voters saying they are very interested, followed by Lexington with 43% very interested. Markets in North Carolina and Kansas round out the college basketball top five.

Top five market rankings for twenty-one major and minor sports are listed in the insert included with this report.

The Year in Sports: Political Profiles of Sports Fans

This timeline shows a selection of sports during the year, the percent of likely voters who are very interested (height of bar), and the relative partisanship of the fans (red = more Republican fans; blue = more Democratic fans).



Political Bracketology: GOP Leaning Fans Win Three of Four Elite Eight Contests

If the Elite Eight was a leading indicator of national election outcomes, then the 2010 midterms would be very good for the Republicans. In three of the four games, the team with the more Republican fan base beat the team with the more Democratic fan base. Only Tennessee, with a heavily Republican fan base, lost to Michigan State which has fans who are more evenly balanced between the two parties.

We also looked at fan intensity. Perennially winning teams build strong fan bases, but in three of the four 2010 Elite Eight games, the losing team had the stronger home fan base. Only in the Duke-Baylor game did the winner have the more passionate fans back home.

Our political fan profiles are based on a total of 31,846 interviews conducted by Scarborough Research prior to the start of the 2009-2010 season. (See details below.) From the 81 markets available to us, we selected one or more DMA's to represent the home market for each of the eight teams. (Unfortunately for Baylor, data is not available for Waco and we were forced instead to use Dallas and Austin, resulting in lower fan interest scores for Baylor.)

Our political index scores are based on the group of adults who say they watch the team on broadcast television or on cable television, or listen to them on the radio. For Michigan State, this fan base is 30% of adults in the combined Detroit, Flint, and Grand Rapids media markets.

To get the party index scores, we compare the partisanship of Michigan State fans to the partisanship of all adults in those media markets. The Republican index score of 111 means that Spartan's fans are 11% more likely to be a Republican or Republican leaner when compared to the overall local adult population. The Democratic index score is 109, so the Spartan's fan base is a party-toss up. Meanwhile, down in Knoxville, the Vols fans are indexing at 118 for Republicans and only 88 for Democrats, a 30 point Republican advantage.

The 2010 NCAA Final Four and Elite Eight: Political profiles of home market fans.

"VERY INTERESTED" IN MEN'S COLLEGE BASKETBALL				FOLLOW TEAM ON TV/RADIO				Party Margin	Notes
% of all Adults		% of Likely Voters		Party Index Scores		Republican/Lean Rep	Democrat/Lean Dem		
MIDWEST	MI	Michigan State	12 <div><div></div></div> 13 <div><div></div></div>	30 <div><div></div></div>	111	109	R+2	Historically, there is less fan interest in BB at Mich. State which competes in a tough two major university marketplace with the University of Michigan. Red Wings are the big winter-spring sport in Mich.	
	TN	Tennessee	23 <div><div></div></div> 30 <div><div></div></div>	49 <div><div></div></div>	118	88	R+30	Fan interest here is second only to Kentucky, but still second fiddle to UT football which is followed by 61% on TV and radio. Lady Vol's BB is followed by 45%.	
WEST	IN	Butler	20 <div><div></div></div> 25 <div><div></div></div>	14 <div><div></div></div>	115	82	R+33	Butler has a strong following in a competitive sports market ruled by the Colts, followed by 69%. The University of Indiana Hoosiers are followed by 32%.	
	KS	Kansas State	27 <div><div></div></div> 33 <div><div></div></div>	31 <div><div></div></div>	111	106	R+5	As in Michigan, the state of Kansas has two major universities competing for fans. University of Kansas BB is followed by 25%.	
EAST	WV	West Virginia	19 <div><div></div></div> 24 <div><div></div></div>	28 <div><div></div></div>	126	99	R+27	Mountaineers sports have a very solid fan base. WVU BB is second only to WVU football--34% thanks to a lack of local pro sports in the state. 27% follow the Steelers, 25% UK BB and 22% follow the Bengals.	
	KY	Kentucky	38 <div><div></div></div> 47 <div><div></div></div>	57 <div><div></div></div>	107	100	R+7	Interest in the Wildcats and the Univ of Louisville (followed by 43%) combine to give Kentucky the country's highest concentration of college BB fans. Only the Derby is more popular, followed by 64%.	
SOUTH	NC	Duke	26 <div><div></div></div> 33 <div><div></div></div>	30 <div><div></div></div>	109	111	D+2	In their home market Raleigh-Durham, Duke is followed by 30% and UNC by 39%. Unlike TN, college BB is king in Carolina, as the three research-triangle schools have larger BB fan bases than football.	
	TX	Baylor	7 <div><div></div></div> 10 <div><div></div></div>	5 <div><div></div></div>	107	128	D+21	Survey data is not available for Baylor's home market of Waco, which is sandwiched between the Dallas and Austin DMA's where Cowboys football (63%) rules. Baylor fan interest would be higher in Waco.	
Average Winners		19 <div><div></div></div> 24 <div><div></div></div>	26 <div><div></div></div>	115	100	R+15			
Average Losers		24 <div><div></div></div> 30 <div><div></div></div>	36 <div><div></div></div>	111	106	R+5			

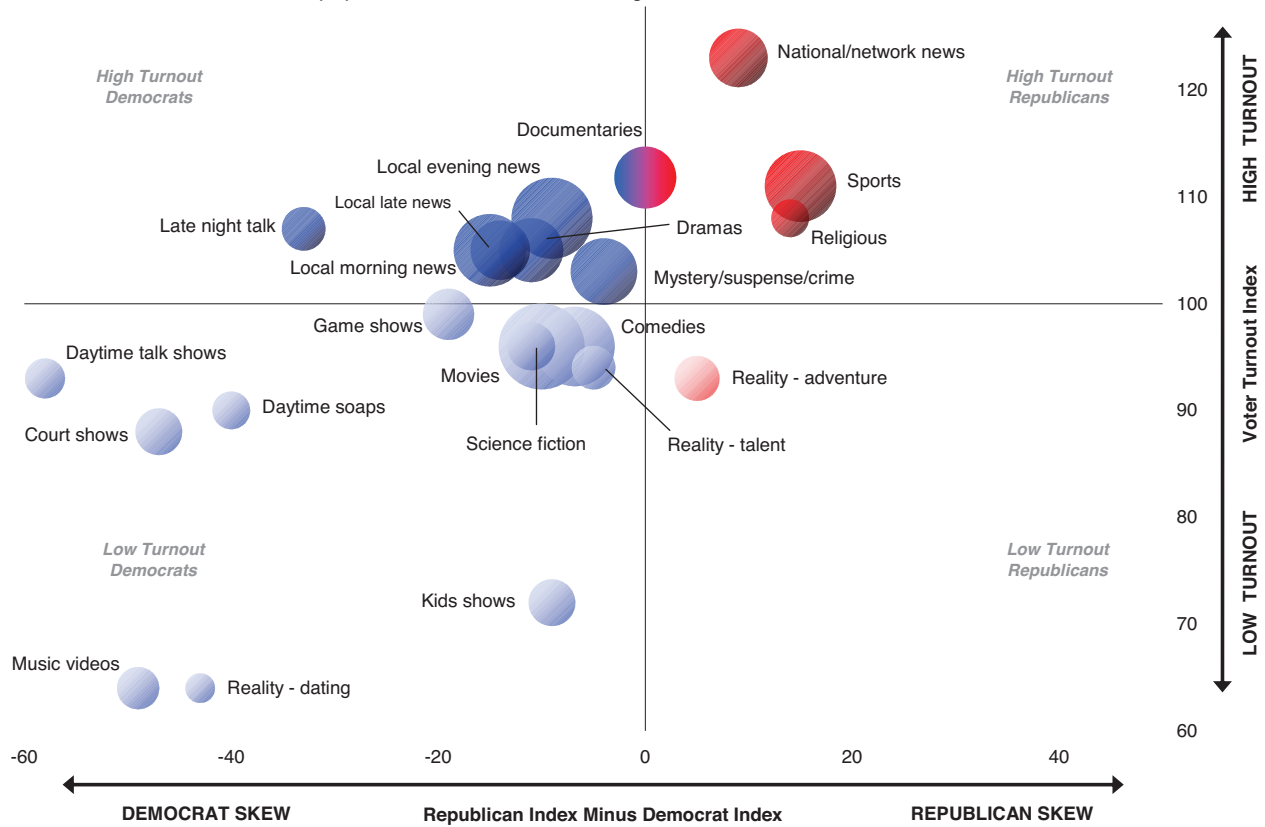
Where teams stood going into the 2009-2010 season using local market surveys conducted by Scarborough Research from August 2008-September 2009. Adult 18+ sample sizes by market groups: Detroit, Flint and Grand Rapids DMAs N=7,130; Knoxville DMA N=1,991; Kansas City (KS counties only) and Wichita DMA N=2,849; Charleston-Huntington DMA N=2,009; Lexington and Louisville DMAs N=3,999; Charlotte, Greensboro and Raleigh DMAs N=6,828; and Austin and Dallas DMAs N=5,054.

By Will Feltus, Tracey Robinson and Ben Angle; Jeannie Mitchell, Art Director
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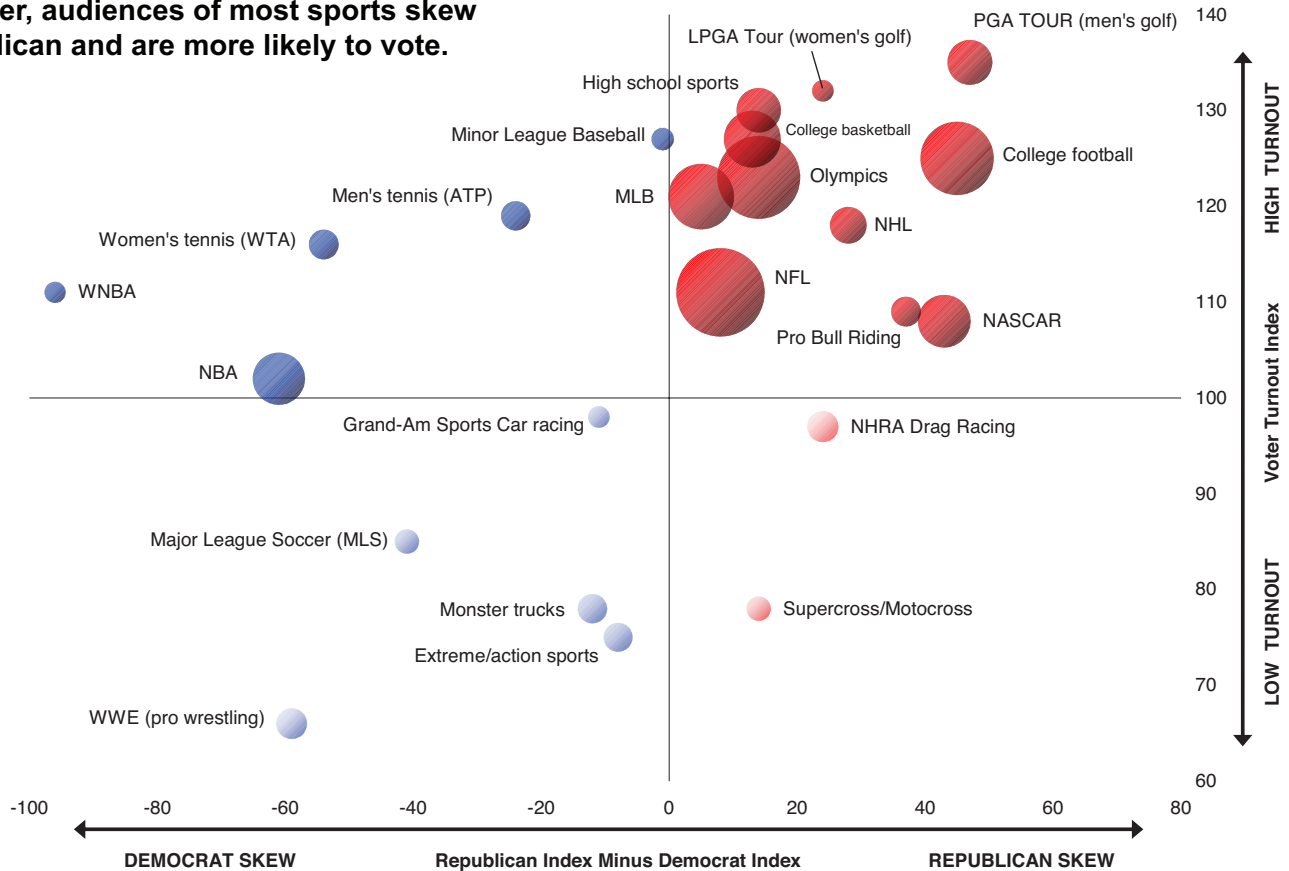
ONLINE: This report plus other public affairs and political media research is available at www.NMRPP.com/research. To receive our e-mail reports, or to add or delete names from our mail list, please send email to research@natmedia.com.

Audiences of most TV program formats skew Democrat.

Program format audiences in upper right (e.g. National/network news) have a higher than average percentage of viewers who are Republican and likely to vote. Audiences in upper left (e.g. Late night talk) have a higher percentage of viewers who are Democratic and likely to vote. The bubble size is proportionate to the percentage of adults who report typically watching the television format. Axis values are index scores that compare format viewers to the total adult population which has an average index value of 100.



However, audiences of most sports skew Republican and are more likely to vote.



Voters' Top-Five Media Market Rankings for Major and Minor Sports

Ranked by percent of high turnout voters in media market who are "very interested". Kentucky markets Louisville (51%) and Lexington (43%) top the list for college basketball. Nationally, 14% of all high turnout voters are very interested in college basketball.

NFL (29%)

- 54 Pittsburgh, Pa.
- 52 Green Bay, Wis.
- 44 Milwaukee, Wis.
- 42 Providence, R.I.
- 41 New Orleans, La.

MLB (17%)

- 41 Boston, Mass.
- 37 Providence, R.I.
- 33 St. Louis, Mo.
- 30 Philadelphia, Pa.
- 29 Hartford, Conn.

NBA (9%)

- 33 San Antonio, Texas
- 19 Cleveland, Ohio
- 18 Salt Lake City, Utah
- 18 Phoenix, Ariz.
- 17 Boston, Mass.

NHL (5%)

- 29 Pittsburgh, Pa.
- 27 Detroit, Mich.
- 24 Buffalo, N.Y.
- 17 Flint, Mich.
- 14 Grand Rapids, Mich.

Pro Bull Riding (3%)

- 11 Oklahoma City, Okla.
- 10 Albuquerque, N.M.
- 10 Tulsa, Ariz.
- 8 Little Rock, Ark.
- 7 Wichita, Kan.

Horse racing (3%)

- 10 Louisville, Ky.
- 9 Lexington, Ky.
- 7 Albuquerque, N.M.
- 6 Charleston, W.Va.
- 6 Oklahoma City, Okla.

LPGA Tour (2%)

- 8 Honolulu, Hawaii
- 6 Fort Myers, Fla.
- 5 Orlando, Fla.
- 5 West Palm Beach, Fla.
- 4 Boston, Mass.

Olympics (28%)

- 41 Salt Lake City, Utah
- 39 San Diego, Calif.
- 35 Bakersfield, Calif.
- 34 Des Moines, Iowa
- 33 Denver, Colo.

College basketball (14%)

- 51 Louisville, Ky.
- 43 Lexington, Ky.
- 36 Greensboro, N.C.
- 33 Wichita, Kan.
- 32 Raleigh, N.C.

PGA TOUR (9%)

- 17 Fort Myers, Fla.
- 16 Orlando, Fla.
- 14 West Palm Beach, Fla.
- 14 Tampa, Fla.
- 14 Jacksonville, Fla.

Men's tennis (4%)

- 8 Fort Myers, Fla.
- 8 West Palm Beach, Fla.
- 7 Miami, Fla.
- 7 San Diego, Calif.
- 6 New York, N.Y.

NHRA Drag Racing (3%)

- 8 Albuquerque, N.M.
- 7 St. Louis, Mo.
- 6 Fresno, Calif.
- 6 Knoxville, Tenn.
- 6 Jacksonville, Fla.

Minor League Baseball (2%)

- 5 Toledo, Ohio
- 5 Flint, Mich.
- 5 St. Louis, Mo.
- 4 Wilkes-Barre, Pa.
- 4 Roanoke, Va.

MLS (2%)

- 6 San Diego, Calif.
- 5 El Paso, Texas
- 4 Seattle, Wash.
- 4 Houston, Texas
- 3 Los Angeles, Calif.

College football (23%)

- 55 Birmingham, Ala.
- 49 Knoxville, Tenn.
- 47 Oklahoma City, Okla.
- 43 Columbus, Ohio
- 40 Jacksonville, Fla.

NASCAR (10%)

- 23 Greensboro, N.C.
- 22 Greenville, S.C.
- 20 Roanoke, Va.
- 18 Jacksonville, Fla.
- 18 Chattanooga, Tenn.

High school sports (9%)

- 20 Wilkes-Barre, Pa.
- 18 El Paso, Texas
- 17 Wichita, Kan.
- 17 Birmingham, Ala.
- 17 Des Moines, Iowa

Women's tennis (3%)

- 8 Miami, Fla.
- 7 Fort Myers, Fla.
- 7 West Palm Beach, Fla.
- 7 San Diego, Calif.
- 6 Las Vegas, Nev.

IndyCar Series (3%)

- 10 Indianapolis, Ind.
- 8 Albuquerque, N.M.
- 7 Phoenix, Ariz.
- 6 Cleveland, Ohio
- 5 Oklahoma City, Okla.

WWE (2%)

- 8 Harlingen, Texas
- 6 Charleston, W.Va.
- 6 Birmingham, Ala.
- 6 Little Rock, Ark.
- 5 Phoenix, Ariz.

WNBA (2%)

- 9 Hartford, Conn.
- 6 Chattanooga, Tenn.
- 5 Knoxville, Tenn.
- 3 Little Rock, Ark.
- 3 Nashville, Tenn.