

THE NATIONAL FOOTBALL LEAGUE

A REPORT ON TV VIEWERSHIP

1



Bailey Pennington Allison
PRL 609 Culminating Project

TABLE OF CONTENTS

PAGE 3

Background & market problem

PAGE 4

Research objectives, questions & methodology

PAGES 5-19

Research findings & qualitative research

PAGE 20

Insights, rationale & qualtrics survey

PAGE 21

Recommendations

PAGE 22

References





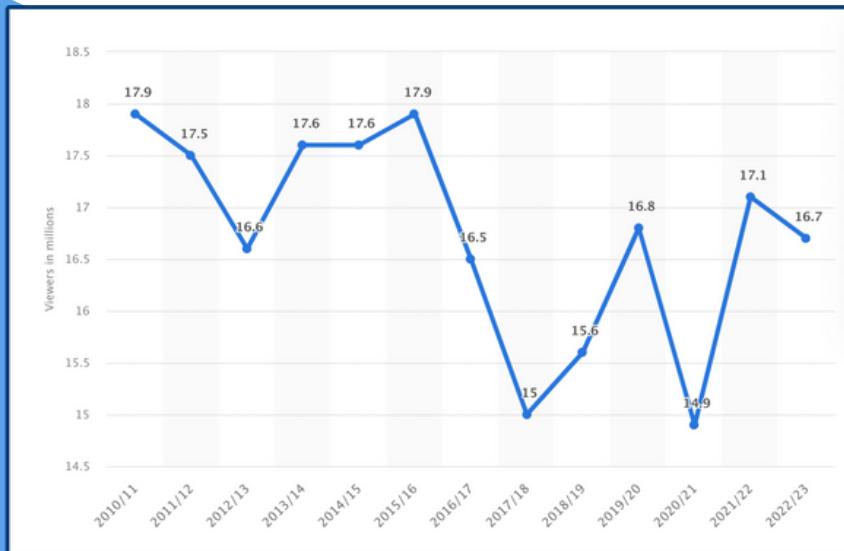
BACKGROUND

The National Football League (NFL) has existed for more than a century, beginning in 1920 with 14 charter teams in 13 cities (2019). The sport was an early adopter of television — beginning in 1939, nearly a decade before TVs were widely available — and has televised games for nearly 85 years (“Impact of Television,” n.d.). In the decades since, the NFL has grown to 32 teams across the U.S. with approximately 14-16 televised games each week. Games are typically aired on Mondays, Thursdays and Sundays as well as the occasional Saturday during the holidays and playoffs. The NFL is viewable across all major TV networks — ABC/ESPN, CBS, Fox, NBC — and newly streaming on Amazon Prime.

MARKET PROBLEM

The National Football League has long been considered the most dominant sport on television (Adgate, 2023). However, in recent years, political controversies, severe injuries and general disinterest has led to a decline in TV viewership (Gitlin; Gough, 2023; Norman 2023). This decline in TV ratings has further implications for the league and individual teams in terms of advertising costs, ticket sales and merchandise revenue.

Figure 1: Average TV viewership NFL regular season (2010- 2023)



*Is the NFL
dominant? Or
in decline?*

RESEARCH OBJECTIVE

To learn the factors, both demographic and psychographic, that influence NFL TV viewership.

RESEARCH QUESTIONS

1. Who is the target audience for NFL TV viewership?
2. What motivates people to watch the NFL on TV or prevents them from doing so?
3. How does the NFL compare with the popularity in TV viewership of other professional sports?

METHODOLOGY

For this report, I conducted intensive research using the “3S” approach, which includes secondary research, syndicated research and social listening, followed by primary qualitative research.

Secondary: I sourced a variety of news and scholarly articles, including Forbes, Pew Research and Gallup among others, to gain background knowledge and industry information about professional sports and TV viewership habits.

Syndicated: I used a variety of databases to find available TV viewership, demographic and psychographic data, including MRI Simmons, Statista and Sports Market Analytics through Syracuse University Libraries.

Social Listening: I employed several social listening tools to gain knowledge of the #NFL and its competitors through Google Trends, Answer the Public and Brand24.

Qualitative Research: I conducted five, one-on-one interviews with participants using projective techniques — specifically using fill-in-the-blank and open-ended questions as well as drawing a picture — to confirm my research findings.

RESEARCH QUESTION 1

Who is the target audience for NFL TV viewership?

FINDINGS

In order to discover the NFL's **target** audience, I had to first understand who is considered their **current** audience. Using MRI Simmons quick reports and brand catalysts, I uncovered answers to both of these questions, using a "fan" perspective and TV viewership perspective.

Of those who watch one-or-more hours of TV weekly, the NFL's current routine audience is primarily **black or white men over the age of 45** (Figures 2-4).

Figure 2: Age demographics of those who regularly watch NFL games (regular season only) out of all TV viewers 1+ hours weekly

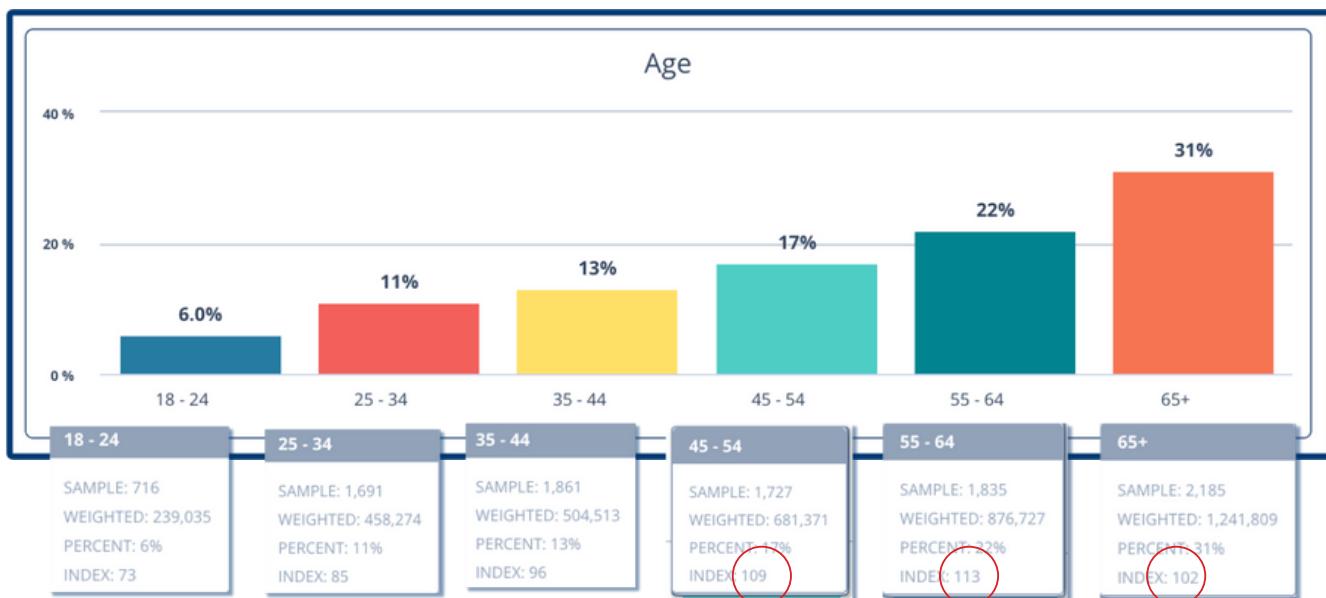


Figure 3: Gender demographics of those who regularly watch NFL games (regular season only) out of all TV viewers 1+ hours weekly

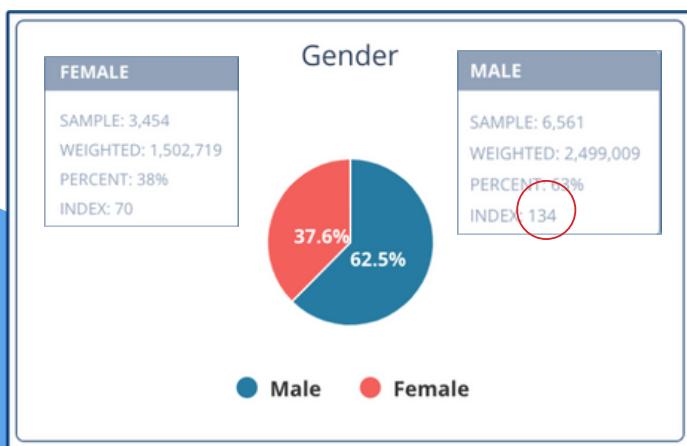
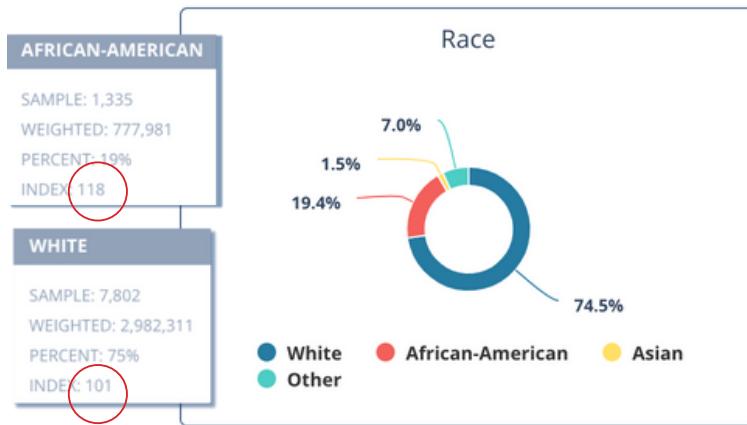


Figure 4: Race demographics of those who regularly watch NFL games (regular season only) out of all TV viewers 1+ hours weekly



Based on this data, men comprise nearly two-thirds of routine NFL TV viewers, and are 34% ($I = 134$) more likely to tune into regular season games (Figure 3). White viewers make up almost three-quarters of routine NFL TV viewers, though African-Americans are 18% ($I = 118$) more likely to watch (Figure 4). Lastly, the NFL's routine viewership base is an aging one, with 70% of regular viewers being 45-years-old or older, with the highest likelihood viewers typically being 55-64 years-old ($I = 113$) (Figure 2).

Running a similar Simmons quick report of those who consider themselves average or super fans of the NFL from the same base sample (those who view one-or-more hours of TV each week) showed similar results — indicating a consistent or **reliable finding** of the current NFL TV audience.

Separately, ratings data from Sports Market Analytics (2021) portray the **consistency** of these demographics in NFL TV viewership over a seven year period (Figures 5 & 6), with older men remaining the primary viewers.

Figure 5

Football-NFL TV Viewing: % by Age Group

| Item | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|-------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| Base (No. viewing - add ,000) | 136,279 | 128,481 | 121,741 | 112,791 | 114,405 | 124,413 | 114,931 | 117,912 |
| % BY AGE | | | | | | | | |
| 13-17 | 5.1 | 4.7 | 4.8 | 3.8 | 3.2 | 4.4 | 3.2 | 4.7 |
| 18-34 | 25.1 | 21.8 | 19.3 | 17.9 | 20.1 | 25.3 | 22.3 | 20.8 |
| 35-49 | 25.2 | 24.1 | 25.2 | 26.4 | 24.3 | 23.8 | 22.7 | 23.9 |
| 50-64 | 26.6 | 27.8 | 28.4 | 29.0 | 28.6 | 26.3 | 27.2 | 27.3 |
| 65+ | 18.0 | 21.6 | 22.4 | 22.9 | 23.8 | 20.1 | 24.6 | 23.2 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Median Age | 46.0 | 49.0 | 50.0 | 51.0 | 51.0 | 47.0 | 51.0 | 50.0 |

Source: SBRnet, Inc., 2021. All Rights Reserved.

Figure 6

Football-NFL TV Viewing: % by Gender

| Item | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|-------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| Base (No. viewing - add ,000) | 136,279 | 128,481 | 121,741 | 112,791 | 114,405 | 124,413 | 114,931 | 117,912 |
| % BY GENDER | | | | | | | | |
| Male | 54.9 | 52.9 | 53.0 | 55.0 | 54.6 | 56.8 | 56.0 | 58.0 |
| Female | 45.1 | 47.1 | 47.0 | 45.0 | 45.4 | 43.2 | 44.0 | 42.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Source: SBRnet, Inc., 2021. All Rights Reserved.

In fact, male viewership has seen a slight increase over the last seven years, while female viewership has slightly decreased (Figure 6).

Over the same time frame, the median viewership age has hovered around 50 years old (Figure 5).

BRAND PERSONAS

Diving deeper, Simmons Brand Catalyst further **confirmed** these findings through a brand persona of the regular NFL TV viewer, “Football Freddie” (Figures 7 & 8), and the NFL super-fan, “Super-Fan Sam” (Figures 9 & 10).

Figure 7: MRI Simmons Brand Catalyst of regular NFL TV viewer using Xtensio template

Football Freddie



"Enjoy life — there's plenty of time to be dead!"

Attitudes

- I rely on my cell phone to keep up with news or sports (I = 136)
- I watch more TV now overall than I did a year ago (I = 124)
- My spouse has a significant impact on the brands I choose (I = 129)
- I take an active role in planning for my retirement (I = 116)

Bio

Freddie works as a business analyst for a Midwest automotive manufacturer. Born and raised in Milwaukee, Wisconsin, he's somewhat conservative politically and tries to stay up-to-date on current affairs. Freddie's recently married with no kids and looks to his wife for his fashion sense. When he's not tinkering under the hood of a car or cracking jokes, he can be found glued to the TV for all things football. Go Pack, go!

Age: 55
Work: Business Analyst
Family: Married, no kids
Location: Milwaukee, WI

Interests: Funny, Couch potato, Car enthusiast, Witty

Preferred Media

| |
|-----------------------------------------------|
| Fox NFL Thursday Night Kick-Off (I = 361) |
| Football Night in America (I = 359) |
| ESPN Monday Night Countdown (I = 358) |
| ESPN Pre-Season Football (I = 349) |
| NFL Network Thursday Night Pre-Game (I = 348) |

Preferred Brands






Figure 8: MRI Simmons Brand Catalyst of regular NFL TV viewer

| | | | |
|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  AGE 55-64 |  CENSUS REGION Midwest |  CHILDREN IN HOUSEHOLD No Child 0-17 Years |  EDUCATION Post-Graduate Degree |
| INDEX: 112 REACH: 18.7% | INDEX: 120 REACH: 25% | INDEX: 104 REACH: 67.4% | INDEX: 109 REACH: 15.4% |
|  GENDER Men |  HOUSEHOLD INCOME \$150,000 - \$199,999 |  MARITAL STATUS Now Married |  OCCUPATION Management, Business and Financial Operations |
| INDEX: 134 REACH: 64.8% | INDEX: 118 REACH: 12.3% | INDEX: 110 REACH: 58.1% | INDEX: 122 REACH: 13.1% |

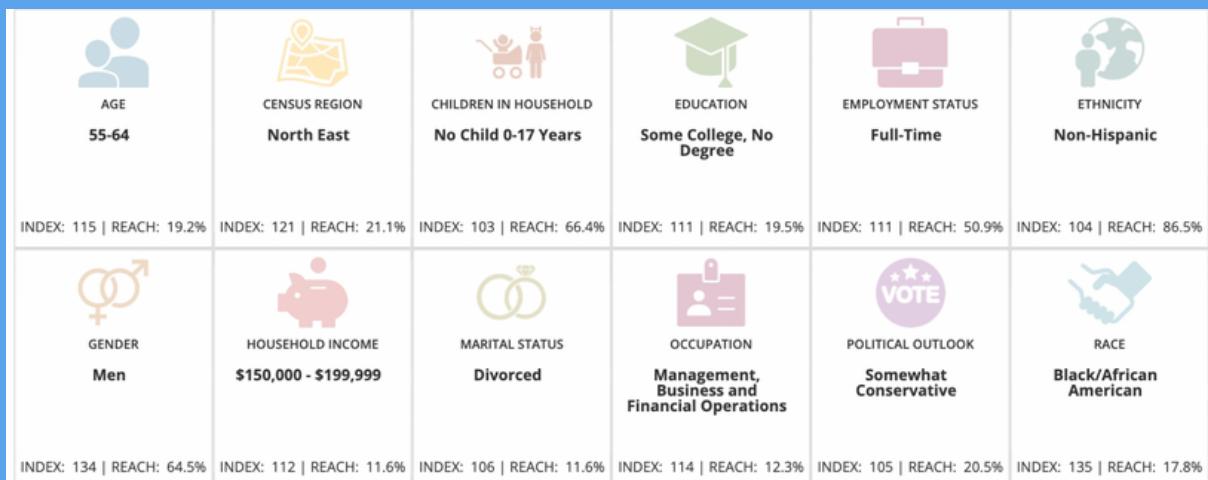
Football Freddie represents the average NFL TV viewer who usually watches games across all available air days: male (I = 134), age 55-64 (I = 112), located in the Midwest (I = 120) (Figure 8). Football Freddie's life mantra is "life should be as much fun as possible," which coincides with his love of the sport. Given his football interest, his preferred media is football-related across all channels (I = 348-361) and his preferred brands tend to be sports-related as well, such as Under Armour and Dick's Sporting Goods (Figure 7).

On the other hand, Super-Fan Sam represents those NFL viewers who take their football loyalty a step further by being an enthusiast (Figures 9 & 10).

Figure 9: MRI Simmons Brand Catalyst of NFL Super-Fan using Xtensio template



Figure 10: MRI Simmons Brand Catalyst of the NFL Super-Fan



Similar to Football Freddie, Super-Fan Sam is a male (I = 134) age 55-64 (I = 115) (Figure 10). He is African-American (I = 135) and resides in the North East region of the U.S. (I = 121) (Figure 10). Super-Fan Sam seeks to be the center of attention, and his outgoing personality pairs perfectly with being an outspoken and loyal fan. Like Freddie, his preferred media is football-related across all channels (I = 339-346) and his preferred brands are also sports-related, including as NFL Shop.com, Nike and Buffalo Wild Wings (Figure 9).

Both of these brand personas fit the mold of the **current NFL TV audience** as sourced through Simmons quick reports (Figures 2-4). Meanwhile, a Brand Catalyst profile of NFL non-fans reflect how non-viewers are younger and/or female (Figure 11).

Figure 11: MRI Simmons Brand Catalyst of the NFL Non-Fan

| | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
|  AGE 18-24 INDEX: 114 REACH: 13.2% |  CENSUS REGION South INDEX: 110 REACH: 42.2% |  CHILDREN IN HOUSEHOLD Any Child 0-17 Years INDEX: 103 REACH: 36.5% |  EDUCATION 12th Grade or Less INDEX: 113 REACH: 11.5% |  EMPLOYMENT STATUS Part-Time INDEX: 109 REACH: 13.8% |  ETHNICITY Hispanic INDEX: 106 REACH: 17.6% |
|  GENDER Women INDEX: 119 REACH: 61.7% |  HOUSEHOLD INCOME \$75,000 - \$99,999 INDEX: 95 REACH: 12.9% |  MARITAL STATUS Never Married INDEX: 105 REACH: 30.6% |  OCCUPATION Sales and Office Occupations INDEX: 103 REACH: 12% |  POLITICAL OUTLOOK Very Conservative INDEX: 111 REACH: 17.2% |  RACE White INDEX: 102 REACH: 76.2% |

Non-fans — who are likely not watching televised NFL games and are thus part of the **target audience** the brand is seeking to engage — are 14% more likely to be 18-24 years-old (I = 114) and 19% more likely to be female (I = 119) (Figure 11). Given the slight likelihood that non-fans are typically never married (I = 105) with no children (I = 103) and less than a high school degree (I = 113), there's a higher likelihood that this target group skews even younger (Figure 11).

In summary, the current NFL TV viewer is aging and the younger generations are not watching. **As fewer youth are tuning in to replace the older, male viewers after they pass, there's a strong chance that TV ratings for the NFL will continue to decline over time.**



RESEARCH QUESTION 2

What motivates people to watch the NFL on TV or prevents them from doing so?

FINDINGS

To learn **why** people choose to watch, or not to watch, the NFL I needed to better understand their motivations. Using psychographic data from MRI Simmons combined with secondary research, I discovered that prospective viewers largely fell into three categories: the **sports enthusiasts**, those with **“FOMO”** (better known as the fear of missing out) and the **disinterested**.

Enthusiasm, FOMO or just no?

Sports enthusiasts actively seek out the game. They are highly motivated to find and watch a sporting event and “will readily tell you about their favorite teams and players” (Raney, 2014). Per MRI Simmons data, the NFL’s primary, current viewing audience falls into this category (I = 197) (Figure 15).

Those with **FOMO**, commonly known as the fear of missing out, often tune into an NFL game to be “in the know” of the latest social news or as a source of entertainment. They are casual viewers when it serves them to do so and may watch simply because a friend or family member is actively watching.

People who fall into the **disinterested** category have a myriad of reasons not to watch the NFL or televised sports in general. This group may include younger and/or female audiences who don’t fit into the typical viewer profile. This group may find the sport boring, violent or even political, which contributes to their decision not to watch.

“Viewing sports on television is more often than not an intentional action by an active audience member. However, at times, the activity can be spontaneous and/or passive.”

— Arthur A. Raney, “Why We Watch and Enjoy Mediated Sports”

A 2023 nationwide survey by Pew Research highlighted the reasons why Americans do or do not follow sports closely (Hatfield et al.).

Figure 12

Majorities of Americans who closely follow sports do so to cheer for specific teams or to be entertained

Among those who say they *follow sports at least somewhat closely*, % who say each of the following is a ___ why

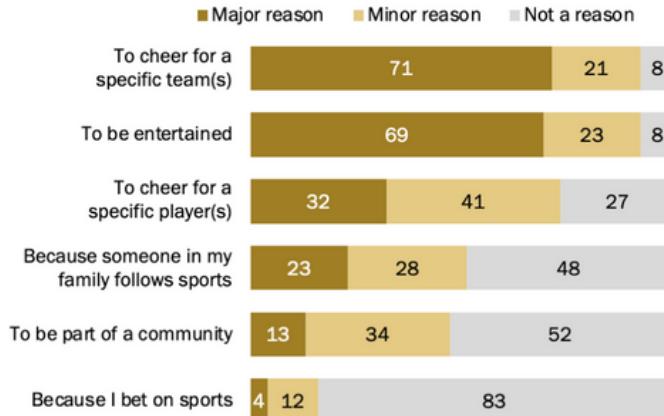
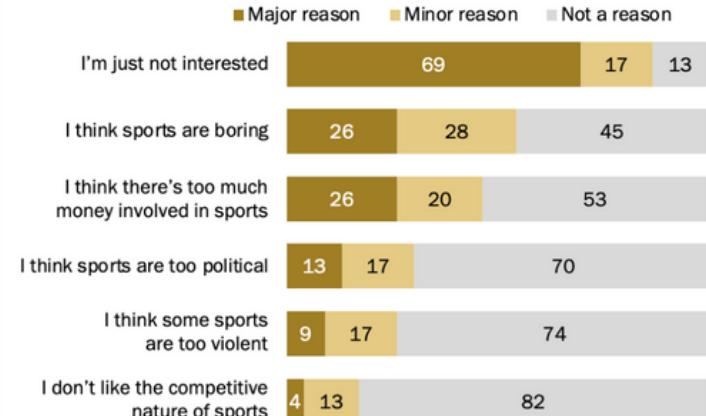


Figure 13

Lack of interest is the top reason why Americans say they don't follow sports closely

Among those who say they *follow sports not too or not at all closely*, % who say each of the following is a ___ why



Although “about six-in-ten Americans (62%) say they follow professional or college sports not too closely or not at all,” those that do are overwhelmingly seeking out a **specific team** or general **entertainment** (Figure 12) (Hatfield et al., 2023). Meanwhile, the majority of Americans are simply “**just not interested**” (Figure 13) and may point to boredom, money, politics or violence as the reason.

Psychographic data from MRI Simmons **validate** these survey results. Unsurprisingly, NFL super-fans were overwhelmingly likely to be sports enthusiasts ($I = 197$) (Figure 15) and, like their brand personas, were 15% more likely to be status seekers ($I = 115$) (Figure 14) who “relish the excitement of risk-taking,” as football athletes risk their bodies for the game.

Figure 14: MRI Simmons Psychographics of the NFL Super-Fan

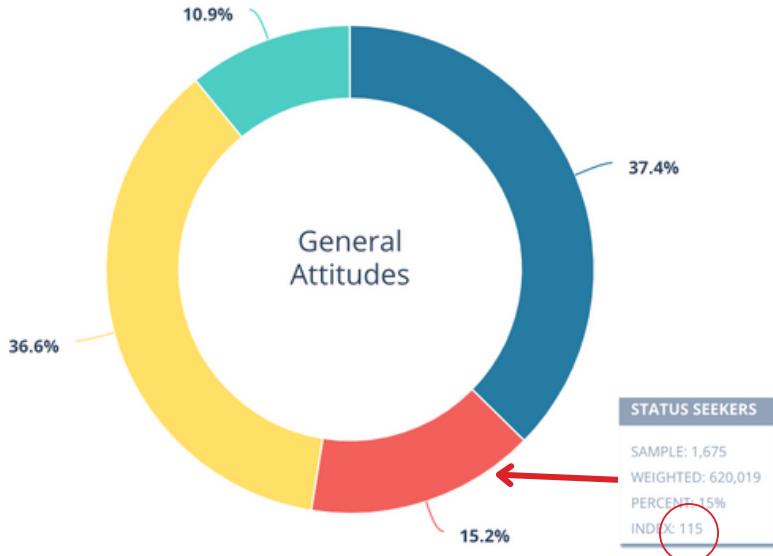
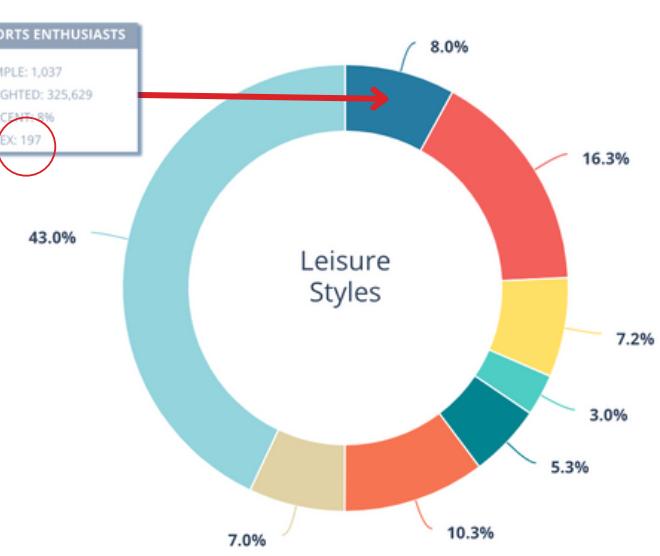


Figure 15: MRI Simmons Psychographics of the NFL Super-Fan



MRI Simmons psychographic data for NFL non-fans also confirmed the Pew results. More than half of non-fans are considered to be culturally connected ($I = 108$) or focused on faith and family ($I = 106$) (Figure 16). These groups are more interested in fine arts and foreign cultures, or spending their time at religious services or with family, compared to something as trivial as sports. Likewise, the leisure style of the non-fan is overwhelmingly passive, accounting for over 53% of this group with a 13% likelihood ($I = 113$) (Figure 17). Non-fans would rather occupy their time collecting or making models over pro sports.

Figure 16: MRI Simmons Psychographics of the NFL Non-Fan

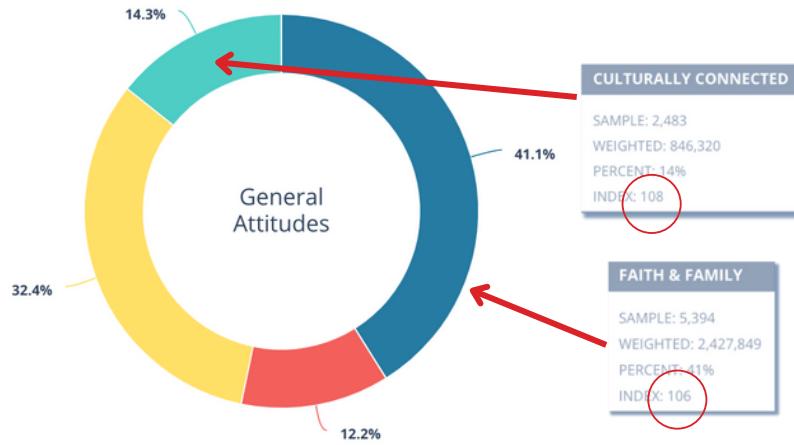


Figure 17: MRI Simmons Psychographics of the NFL Non-Fan

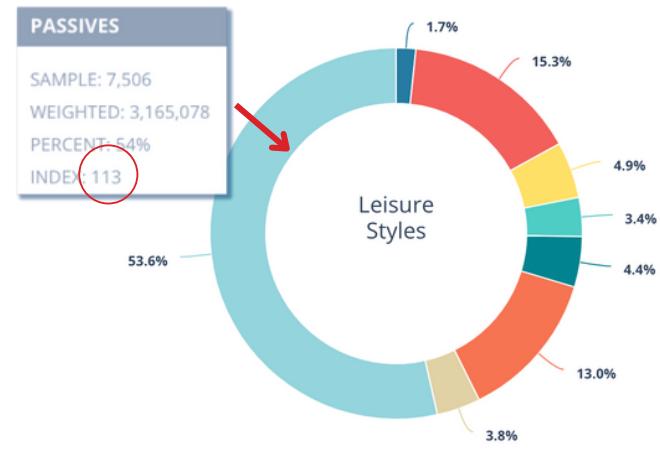
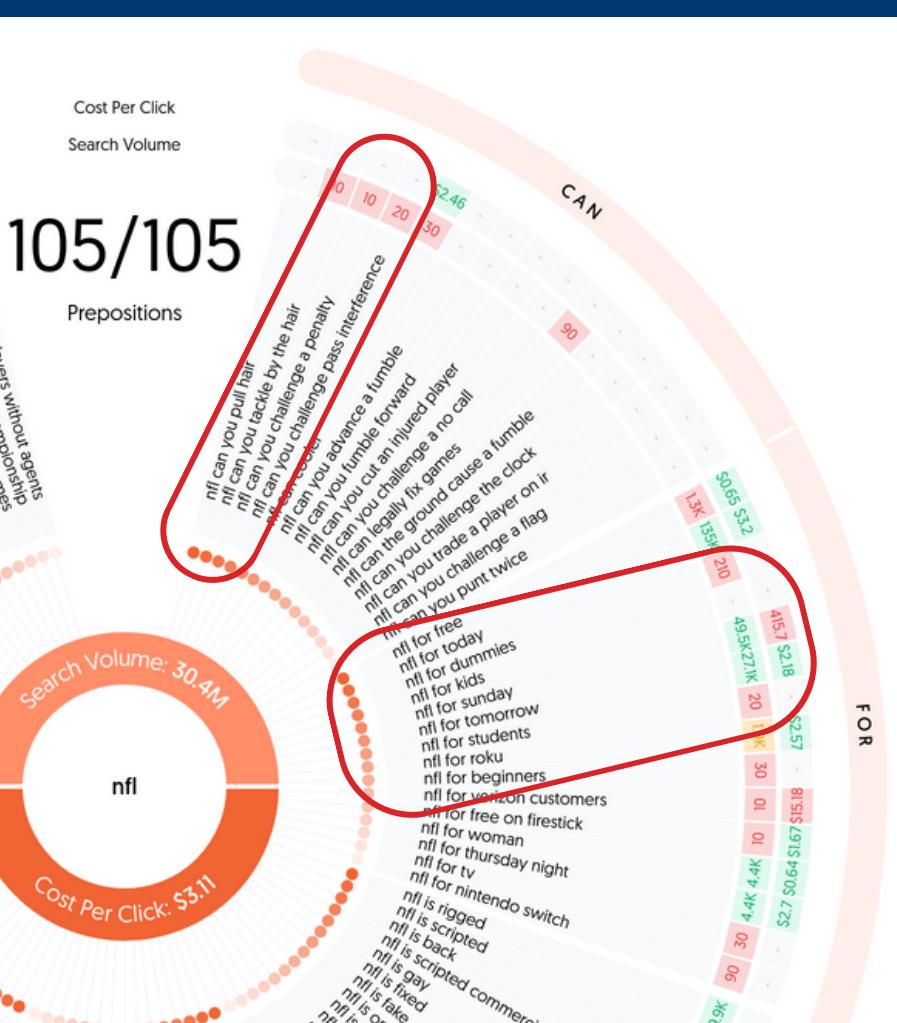


Figure 18: Answer the Public for NFL search



Additional data from Answer the Public demonstrates the discrepancies between viewer categories (Figure 18). A closer look at the “can” category shows the most-searched terms focus on gameplay such as “can you tackle by the hair” or “can you challenge pass interference,” which likely come from **sports enthusiasts**. Meanwhile, the “for” category search terms likely originate from **those with FOMO**, seeking when and where to find the game (“for free” or “for today, tomorrow, Sunday”) or to better understand what’s taking place (“for dummies” and “for beginners”).

RESEARCH QUESTION 3

How does the NFL compare with the popularity in TV viewership of other professional sports?

FINDINGS

There's nothing quite like football

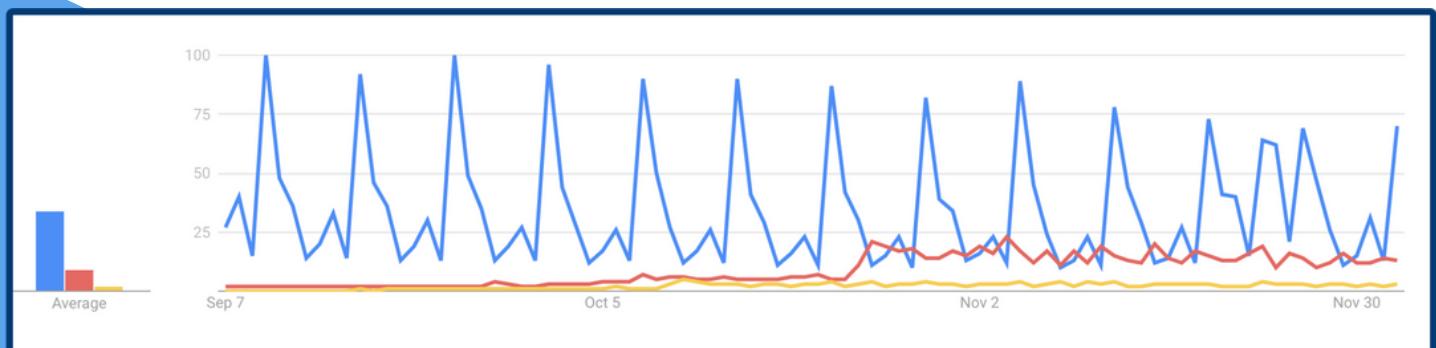
While the NFL, and professional football in general, “has lost some of its popularity” in recent years, it remains “the champion of U.S. spectator sports” (Norman, 2023). Data from Nielson ratings, Statista, Gallup and MRI Simmons all show the NFL’s continued dominance over other professional sports.

In fact, 82 of the 100 most-watched telecasts last year were from the NFL (Adgate, 2023). A closer look shows the most-watched NFL telecast, the 2022 Super Bowl, had more than three times the number of viewers of the most-watched NBA, MLB and NHL telecasts combined (Lewis, 2023).



Social listening also corroborates these findings. A Google trends comparison of the NFL, NBA and NHL — whose three seasons have the most overlap — shows a stark difference in the number of search queries, indicating a **larger overall interest in the NFL** compared to its in-season competitors.

Figure 19: Google Trends of NFL vs NBA vs NHL



In short, **football remains America's favorite sport** (Norman, 2018). However, as Gallup surveys show, this **favoritism is decreasing** in recent years (Jones, 2017; Norman, 2018).

Figure 20: Norman, 2018

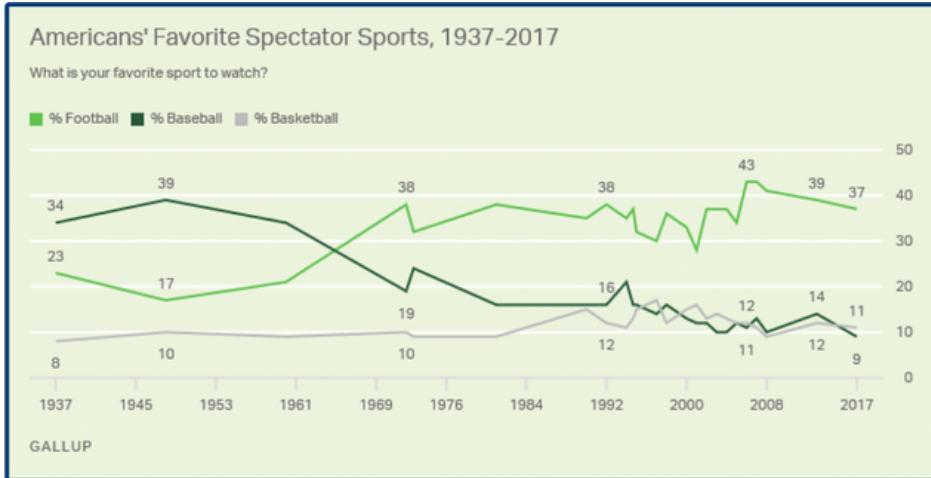
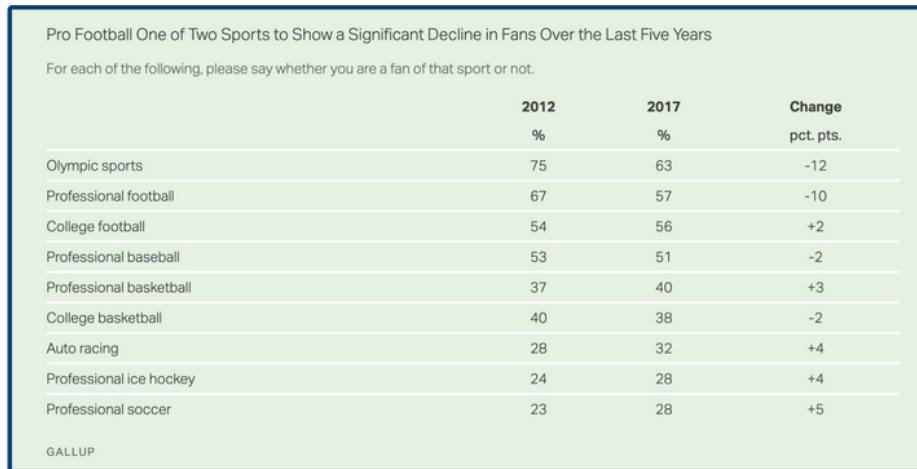


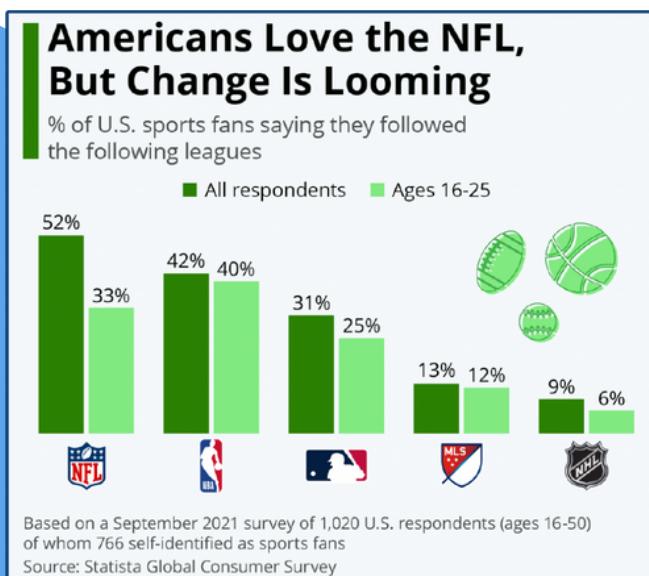
Figure 21: Jones, 2017



Both 2017 and 2018 Gallup surveys show declines in the NFL's fans and favorability, with a 10 percentage point drop in fandom between 2012 and 2017 specifically (Jones, 2017). More recent Statista data posits a reason for this

change: a **difference in age** (Richter, 2022). According to a 2021 Statista survey, the NFL's popularity among the 16-25 age group is seven percentage points lower than the NBA, with only one-third of young respondents following the football league compared to more than half of overall respondents doing so (Figure 22) (Richter, 2022). In short, younger viewers are choosing to watch the NBA over the NFL, **indicating a shift** in decades of viewing habits.

Figure 22: Richter, 2022



Crosstab data from MRI Simmons also show this shift in viewership trends between older and young audiences (Figure 23).

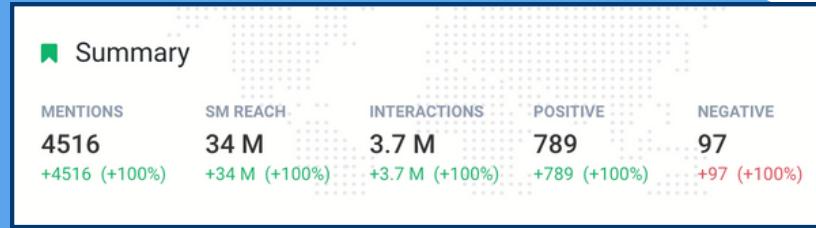
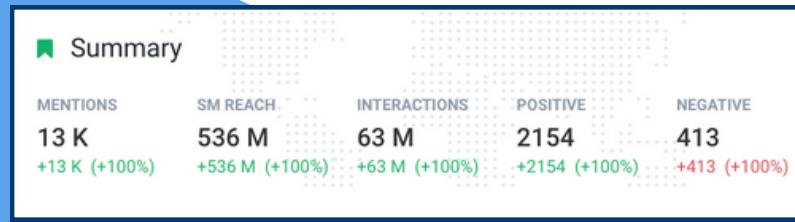
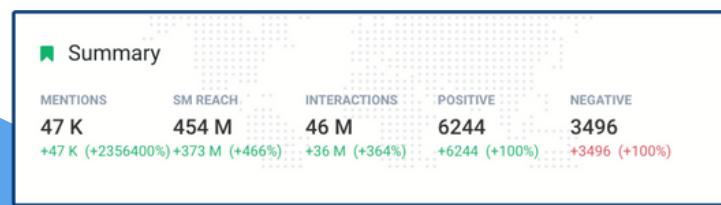
Figure 23: MRI Simmons Crosstab of NBA, NFL and NHL regular season TV viewers among those who watch TV 1+ hours weekly

| | NBA REGULAR SEASON | | | | | NFL REGULAR SEASON | | | | | NHL REGULAR SEASON | | | | |
|-----------|--------------------|---------------|------------|--------------|-------|--------------------|---------------|------------|--------------|-------|--------------------|---------------|------------|--------------|-------|
| | Sample | Weighted(000) | Vertical % | Horizontal % | Index | Sample | Weighted(000) | Vertical % | Horizontal % | Index | Sample | Weighted(000) | Vertical % | Horizontal % | Index |
| Total | 3,442 | 1,332,531 | 100% | 8.5% | 100 | 10,015 | 4,001,728 | 100% | 25.6% | 100 | 1,953 | 646,017 | 100% | 4.1% | 100 |
| AGE 18-24 | 396 | 162,905 | 12.2% | 12.8% | 150 | 716 | 239,035 | 6% | 18.8% | 73 | 148 | 51,514 | 8% | 4% | 98 |
| AGE 25-34 | 704 | 201,283 | 15.1% | 9.5% | 112 | 1,691 | 458,274 | 11.5% | 21.7% | 85 | 405 | 111,611 | 17.3% | 5.3% | 128 |
| AGE 35-44 | 673 | 167,844 | 12.6% | 8.2% | 96 | 1,861 | 504,513 | 12.6% | 24.6% | 96 | 337 | 84,671 | 13.1% | 4.1% | 100 |
| AGE 45-54 | 612 | 236,376 | 17.7% | 9.7% | 114 | 1,727 | 681,371 | 17% | 28% | 109 | 327 | 103,432 | 16% | 4.3% | 103 |
| AGE 55-64 | 499 | 246,391 | 18.5% | 8.1% | 96 | 1,835 | 876,727 | 21.9% | 29% | 113 | 387 | 158,777 | 24.6% | 5.2% | 127 |
| AGE 65+ | 558 | 317,732 | 23.8% | 6.7% | 79 | 2,185 | 1,241,809 | 31% | 26.2% | 102 | 349 | 136,012 | 21.1% | 2.9% | 69 |

Among those who watch one-or-more hours of TV each week, nearly 70% of routine NFL viewers are 45 years-old or older (V sum = 69.9). As noted earlier with MRI Simmons quick reports (page 5), NFL TV viewers are 13% (I = 113) more likely to be ages 55-64. On the other hand, both NBA and NHL viewers are more likely to be from younger age groups, with routine NHL TV viewers being 28% (I = 128) more likely to be between 25-34 years old and NBA viewers 50% (I = 150) more likely to be between 18-24 years old. Both of these age groups are 15% (I = 85) and 27% (I = 73) less likely respectively to watch the NFL routinely. While the NFL still has more overall viewers compared to the NBA and NHL (weighted), both NBA and NHL have a higher portion of their viewers coming from younger age groups, particularly under the age of 35 (NBA V sum = 27.9; NFL V sum = 17.5; NHL v sum = 25.3).

While this data points to a shift in younger audiences' professional sport TV preferences, social listening data shows promise for the NFL. Coinciding with the

Figure 24: Brand24 social listening summary of #NFL (top), #NBA (middle) and #NHL (bottom)



NFL's TV ratings dominance over its competitors, #NFL has significantly more overall mentions than #NBA or #NHL (Figure 24). In fact, #NFL has over 3.5 times more mentions than #NBA and more than 10 times the number of #NHL mentions. While #NBA does have a higher reach and number of interactions than #NFL, the sheer volume of #NFL mentions demonstrates that more users are talking about the league. **This is a positive sign for the NFL given social media users tend to skew younger.**

QUALITATIVE RESEARCH

Projective techniques confirm findings

To confirm my findings for my three research questions, I employed projective techniques through multiple one-on-one interviews. The five participants spanned ages 8-years-old to 63-years-old and included males and females. Individually, I asked each participant several open-ended and fill-in-the-blank questions as well as to draw a picture. Altogether, the responses received **confirmed my previous findings** about the NFL's target audience and TV viewership motivations. The older or male respondents often focused on gameplay and strategy, while the younger or female respondents spoke of the entertainment aspects of the NFL.

INTERVIEW QUESTIONS

Individually, I asked each participant to verbally respond to four fill-in-the-blank questions as well as two open-ended questions. Below are a collection of their responses to these inquiries, in no particular order:

I would describe the NFL as...

- “A powerful sport”
- “Fun to watch”
- “Money-making industry”
- “A sport”
- “A bunch of sweaty men running around on Sunday”

I watch the NFL on TV because...

- “I love the competitiveness, camaraderie and the strategy of each play”
- “I like to see the way the plays take shape”
- “I like to watch my favorite team”
- “I like to see the challenge and guess who wins and who doesn’t”
- “It’s fun to watch the competition”

I don't watch the NFL on TV because...

- "It won't be a close game"
- "Unfortunately, my team is hot garbage"
- "I need to do other things"
- "It makes me unhappy when my team loses"
- "Sometimes the players brag too much"

When I watch an NFL game I feel...

- "Excited"
- "Excitement. I feel a part of something greater than myself because I know millions of people feel the same thing at once"
- "Satisfied"
- "Excited"
- "Anxious"

What do you like most about the NFL?

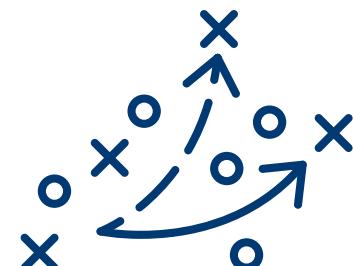
- "Team celebrations, dance creativity when they make a touchdown"
- "The competitiveness, the sportsmanship and at the same time the strategy. It's the perfect mixture of brains and brawn."
- "The quarterback"
- "Hard hitting"
- "All the things they do for charity and the general public"

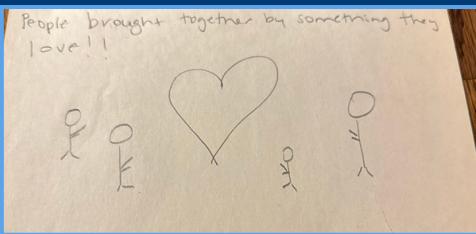
What do you like least about the NFL?

- "The excessive money that is spent toward the program"
- "The way they're changing the game, all the new rules"
- "When the quarterback brags and yells"
- "I like to watch my sports for sports and my politics for politics, and I like to keep them separate."
- "How they've tried to drag politics into it"

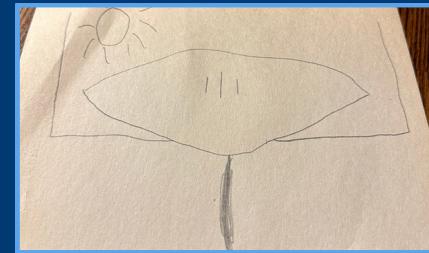
DRAW A PICTURE

In addition to the six fill-in-the-blank or open-ended questions, I also asked each participant to draw a picture of "what comes to mind when you think of the NFL" and then explain their drawing once completed.

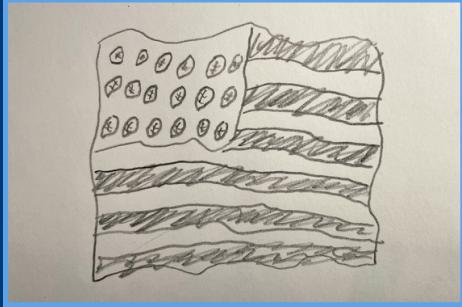




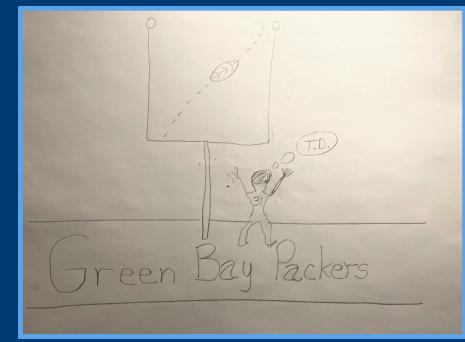
"It's people brought together by something they all love."



"It's a game-winning field goal at the last second."

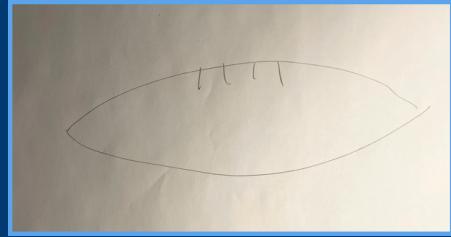


"One country united together by one sport. The stars are footballs."



"It's football — what more can I say?"

"Touchdown celebrations!"



Collectively, several words stood out from these responses.

Positive answers featured concepts like competition, team, fun, camaraderie and celebration among others. On the other hand, negative responses included words such as politics, money-making, anxious, bragging and change.

These words and phrases **confirmed my previous research findings** for NFL TV viewership motivations. Viewers choose to tune in to enjoy the competitive nature of the game. They choose to watch for the entertainment aspects such as touchdown celebrations and star quarterbacks. NFL fans, in particular, watch for the challenge and the strategy. However, all participants agreed that the politics of the league as well as the excessive amount of money consumed and spent on the league dissuades them from tuning in.



Figure 25: Qualitative responses created via WordClouds.com

CONCEPTUAL MAP

An illustration of findings & themes

To better illustrate the summation of my research findings, I used a concept map to categorize results into one of four main themes: **competition**, **entertainment**, **unity** and **controversy** (Figure 26). In terms of competition, the NFL's televised games combine brain and brawn into must-watch competition, attracting sports enthusiasts. Additionally, the NFL has transformed individual game contests into spectacles meant to be enjoyed, garnering attention from those seeking to be entertained. In terms of unity, NFL televised games simultaneously unite millions of fans and viewers across the country in collective celebration, defeat or discussion. Lastly, the NFL is not immune to controversial debates of society as debates surrounding politics, money and the violence of the game seep into the telecasts and onto the field and can hinder TV viewership. Altogether, the overarching insight of these findings and themes is **NFL football brings people together in competition and celebration despite dissensions**.

Figure 26: A conceptual map illustration of research findings and overall themes



INSIGHTS

- **Age is more than a number:** Aging viewers are committed to their routines, like TV viewing habits, while younger viewers aren't interested in "tradition for tradition's sake," like watching their parents' favorite teams – emphasizing a growing generational gap in NFL viewership.
- **Seek to be info-taining:** NFL broadcasts should be as entertaining to viewers as they are informational about the game. Current viewers want to hear strategy of gameplay, but prospective viewers want entertainment worth talking about.
- **Popularity is earned, not given:** Having a comfortable lead over the competition can breed complacency — innovation is crucial to address viewership trends that can and will change over time.

RATIONALE

Collectively, a thorough examination of secondary research, syndicated data and social listening answered my research questions about the demographic and psychographic factors that impact NFL TV viewership. Similarly, primary qualitative research confirmed those findings. A combination of news articles, surveys, Nielsen ratings, sports market analytics, Simmons data and more uncovered the current audience of NFL TV viewers as aging men, while the brand's target audience are younger generations. Additionally, current, prospective and non-viewers could be divided into one of three categories based on their motivations – or lack thereof – to tune into a televised game. Lastly, while the NFL still has a comfortable edge of its pro sports competitors, viewership trends are changing, indicating the need to evolve. Qualitative research confirmed these results as respondents' answers aligned with the sourced data. In summary, the **NFL's TV audience is aging. Current and future viewers want to be informed and entertained, while innovative ideas are needed to attract and retain younger viewers from competing brands.**



QUALTRICS SURVEY

https://syracuseuniversity.qualtrics.com/jfe/form/SV_9SmKyLDRydlzo7Y

RECOMMENDATIONS

- **Think younger:**

- Target outreach and advertising toward younger audiences to **attract interest**. Also consider focusing advertising toward parents of children/youth to **drive consideration** for the sport.
- Continue game broadcasts geared toward younger generations, such as the Toy Story and Nickelodeon simulcasts, which **entertain while teaching** the game.

- **Strike a balance:**

- Use TV broadcasts as an opportunity to explain **game strategy** while celebrating what makes the sport **fun**. After all, football is a child's game.
- Game telecasts are often three-or-more hours in length, which provides ample time to include balance football facts and entertaining tidbits.

- **Tackle controversies head-on:**

- While die-hard fans will continue to watch regardless, others who express disinterest often do so because of money, violence and politics — directly address these in an **honest and factual** manner through community forums and public information campaigns.

- **Embrace both tradition and innovation:**

- Leverage the NFL's 100+ years of tradition to **bridge the generational divide** through mentorship programs between former and current players/coaches, and prospective fans/athletes (i.e. "learn from a pro" events or "ask me anything" social campaigns)
- Conduct additional, **in-depth survey research** to learn the future innovations viewers would like to see. As times change, so do trends and interests among current and potential viewers/.



REFERENCES

Adgate, B. (2023, September 12). *The audience disparity of NFL games and everything else widens*. Forbes. <https://www.forbes.com/sites/bradadgate/2023/01/12/the-audience-disparity-of-nfl-games-and-everything-else-widens/>

Answer the Public. (n.d.) [NFL] Retrieved December 3, 2023, from <https://answerthepublic.com/>

Brand 24 (n.d.) [#NFL]. Retrieved December 5, 2023 from <https://app.brand24.com/panel/summary/?sid=1189726553#d1=2023-09-13&d2=2023-12-13&dr=5&va=1&cdt=days>

Gitlin, J. (n.d.). *Why are the NFL's TV ratings declining? Here's what our survey data tells us*. SurveyMonkey. <https://www.surveymonkey.com/curiosity/why-nfls-tv-ratings-declining/>

Google Trends. (n.d.). [Google Trends of NFL vs NBA vs NHL]. Retrieved December 3, 2023, from <https://trends.google.com/trends/explore?date=today%203m&geo=US&q=%2Fm%2F059yj,%2Fm%2F05jvx,%2Fm%2F05gwr&hl=en>

Gough, C. (2023, June 23). *NFL average TV viewership per game 2023*. Statista. <https://www.statista.com/statistics/289979/nfl-number-of-tv-viewers-usa/>

Hatfield, J. (2023, October 17). *Most Americans don't closely follow professional or college sports*. Pew Research Center. <https://www.pewresearch.org/short-reads/2023/10/17/most-americans-dont-closely-follow-professional-or-college-sports/>

Jones, J. M. (2017, October 17). *Pro Football losing fans; other sports holding steady*. Gallup. <https://news.gallup.com/poll/220562/pro-football-losing-fans-sports-holding-steady.aspx>

Lewis, J. (2023, January 7). *2022 ratings wrap: Another dominant year for NFL*. Sports Media Watch. <https://www.sportsmediawatch.com/2023/01/most-watched-games-2022-nfl-world-cup-olympics-college-football-viewership/>

MRI-Simmons (2023). *2021 Summer MRI-Simmons USA*. [Football-NFL Monday, Thursday or Sunday Night Games: Regularly, Interest in Sports – Summary: NFL Super-Fan]. Retrieved from MRI-Simmons Catalysts, <https://insights.mrisimmons.com/catalyst/brandcatalyst>.

MRI-Simmons (2023). *2021 Summer MRI-Simmons USA*. [Football-NFL Monday, Thursday or Sunday Night Games: Regularly]. Retrieved from MRI-Simmons Catalysts, <https://insights.mrisimmons.com/essentials/quickreports>.

MRI-Simmons (2023). *2021 Summer MRI-Simmons USA*. [Sports/league regularly watched – regular season by TV viewer demographics – age and gender]. Retrieved from MRI-Simmons Catalysts, <https://insights.mrisimmons.com/essentials/crosstab>.

NFL. (2019). *NFL 100 | Original Towns*. NFL.com. <https://www.nfl.com/100/original-towns/>

NFL Football Operations. (n.d.). *Impact of Television | How television has changed the NFL*. NFL Football Operations. <https://operations.nfl.com/gameday/technology/impact-of-television/>

Norman, J. (2023, September 7). *Football still Americans' favorite sport to watch*. Gallup.com. <https://news.gallup.com/poll/224864/football-americans-favorite-sport-watch.aspx>

Raney, A. A., & Bryant, J. (2014). Chapter 19 - Why We Watch and Enjoy Mediated Sports. In *Handbook of Sports and media* (pp. 339–356). essay, Routledge, Taylor & Francis Group. https://doi.org/10.4324/9780203873670_chapter_19

Richter, F. (2022, September 6). *Infographic: Americans love the NFL, but change is looming*. Statista. <https://www.statista.com/chart/15869/favrotie-sports-league/>

Sports Business Research Network. (2021). [NFL TV Viewing Profile]. Retrieved December 3, 2023, from <https://sportsmarketanalytics-com.libezproxy2.syr.edu/research.aspx?csid=535>