



ROSE BOWL OPERATING COMPANY

ROSE BOWL STADIUM RENOVATION STRATEGIC PLAN

VOLUME II of III

MARKET ANALYSIS
(MARKET SURVEY RESULTS)

PRELIMINARY DRAFT – SUBJECT TO REVISION

PRESENTED BY:



BARRETT SPORTS GROUP, LLC

March 2, 2010

Table of Contents

VOLUME I – MARKET ANALYSIS (EXECUTIVE SUMMARY)

- I. Introduction
- II. Executive Summary
- III. Preliminary Findings/Observations
 - Limiting Terms and Conditions

VOLUME II – MARKET ANALYSIS (MARKET SURVEY RESULTS)

- I. Market Survey Results

VOLUME III – MARKET ANALYSIS (ADDITIONAL DUE DILIGENCE)

- Appendix A – Historical Operating Characteristics
- Appendix B – NCAA Stadium Case Studies
- Appendix C – Regional Facility Overview

I. Market Survey Results

I. Market Survey Results

Overview

- Completed Nearly 3,000 Web-Based Surveys
 - ✓ UCLA Donors/Season Ticket Holders 2,357
 - ✓ Tournament of Roses Members 322
 - ✓ Corporate Community 236
 - ✓ Other 51
 - Total 2,966**
- Conducted Fan Intercept Surveys at Rose Bowl Game (January 1, 2010) 551
- Conducted Two Focus Groups with UCLA Donors/Season Ticket Holders
- Conducted Limited Number of One-on-One Telephone Interviews with Current UCLA Donors/Season Ticket Holders and Current Luxury Suite Holders

I. Market Survey Results

Key Assumptions – Premium Seating

- BSG Tested the Following Price Assumptions through Web-Based Surveys and Focus Groups

	Premium Seating - (1)				Lounge Memberships	
	Luxury Suites	Loge Boxes	Premium Club Level Seats	Veranda Club Level Seats	Field Level Lounge Memberships	Horizon Level Lounge Memberships
Annual Price						
High	\$85,000	\$25,000	\$4,500	\$3,000	\$2,000	\$2,000
Medium	\$70,000	\$20,000	\$4,000	\$2,500	\$1,500	\$1,500
Low	\$55,000	\$15,000	\$3,500	\$2,000	\$1,000	\$1,000

(1) Includes season ticket cost to UCLA football and right to purchase tickets to Rose Bowl Game, BCS National Championship Game, and other events.

I. Market Survey Results

Key Assumptions – PSLs

- BSG Tested the Following PSL Price Assumptions through Web-Based Surveys, Focus Groups, and Fan Intercept Surveys

	Personal Seat Licenses (PSLs)
Annual Price	
High	\$10,000
Medium - High	\$7,500
Medium - Low	\$5,000
Low	\$2,500

(1) Does not include Rose Bowl Game ticket.

I. Market Survey Results

- A. Completed Surveys
- B. Luxury Suites
- C. Loge Boxes
- D. Premium Level Club Seats
- E. Veranda Level Club Seats
- F. Impact on Existing Seats
- G. Impact on Current UCLA Donation
- H. Impact of New NFL Stadium
- I. Field Level Lounge
- J. Horizon Level Lounge
- K. Lounge Membership Preference
- L. Project Awareness
- M. Prior Participation
- N. General Comments
- O. Focus Group Sessions
- P. Personal Seat Licenses (Web-Based Surveys)
- Q. Personal Seat Licenses (Fan Intercept Surveys)



A. Completed Surveys

Completed Surveys

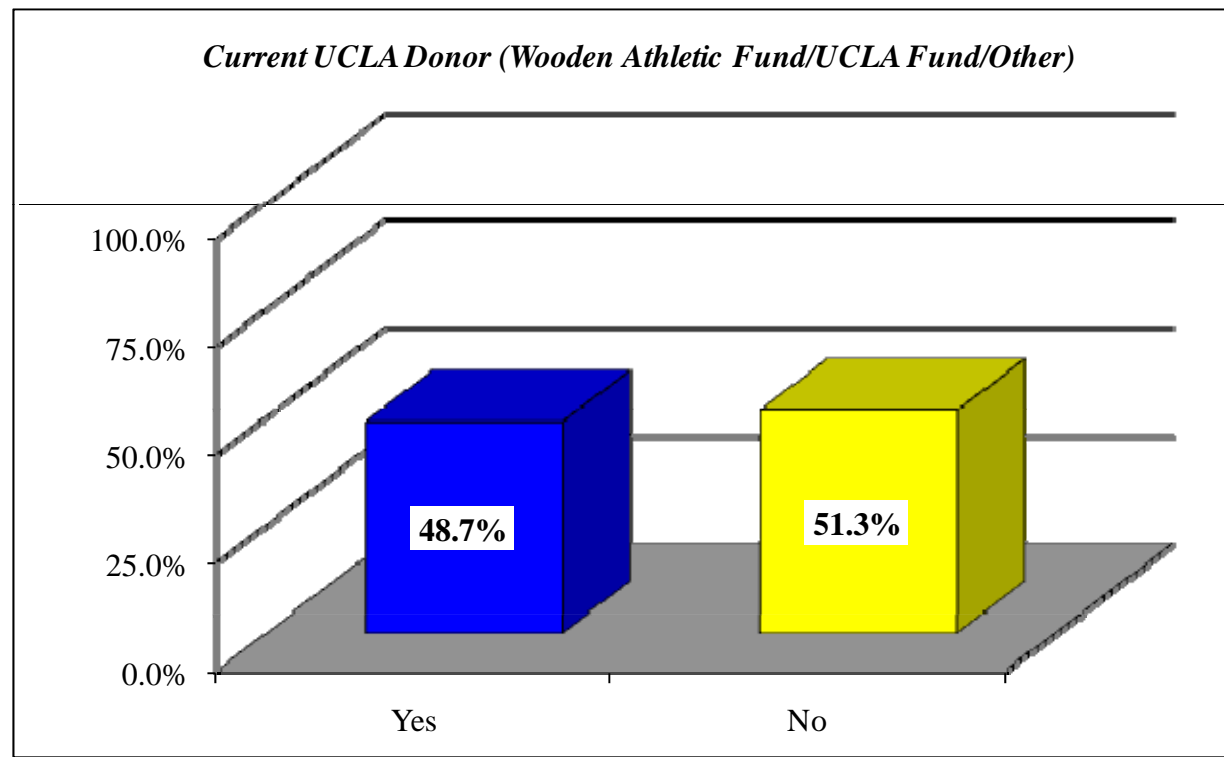
General Observations

- Approximately 49% (1,443) of Respondents are UCLA Donors (Wooden Athletic Fund/UCLA Fund/Other)
- Approximately 80% (2,379) of Respondents are UCLA Football Full Season Ticket Holders
- Approximately 62% (1,464) of Season Ticket Holders have had Season Tickets for 11 Years or More
- Approximately 68% (2,005) of Respondents Attend 5 or More UCLA Games Annually
- Approximately 99% (2,364) of Season Ticket Holders Primarily Utilize Tickets for Personal Use or for a Combination of Personal/Business Related Use (as Opposed to Primarily for Business Use)
- Respondents have an Average of 3.7 Season Tickets per Account

A. Completed Surveys

Completed Surveys

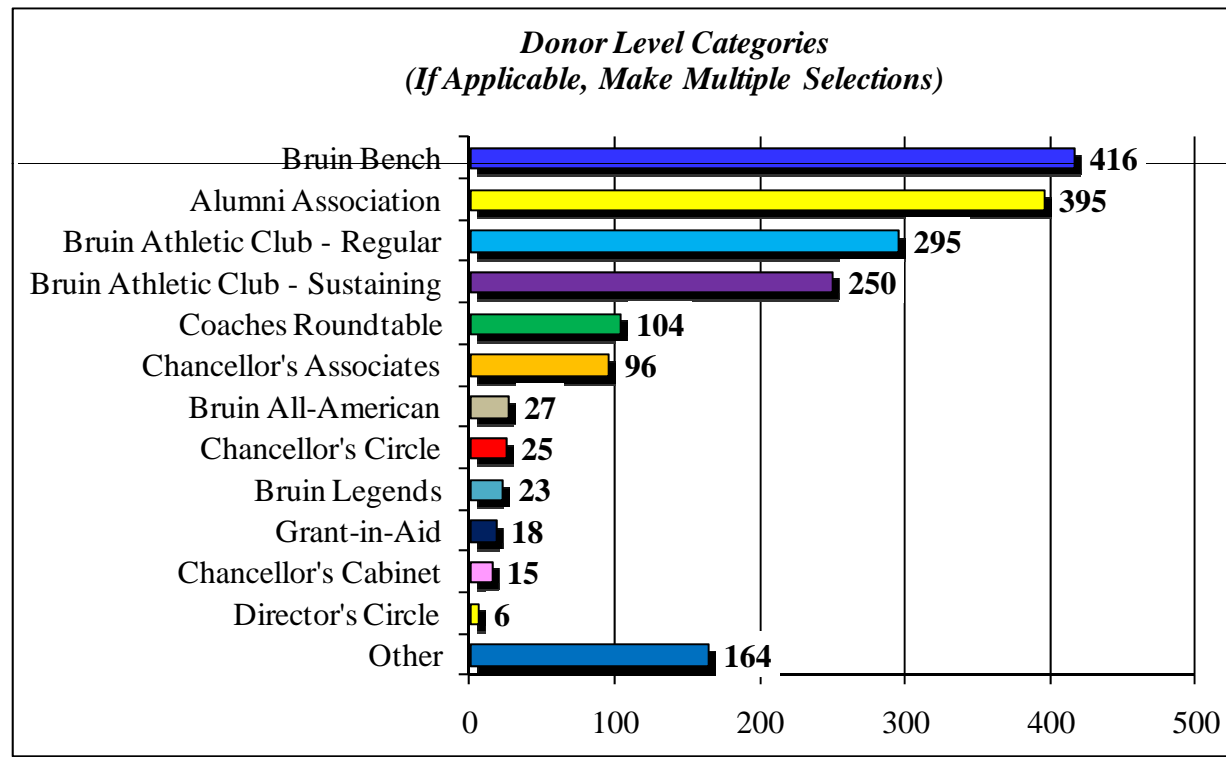
- Completed Surveys by UCLA Donor (Wooden Athletic Fund/UCLA Fund/Other)



A. Completed Surveys

Completed Surveys

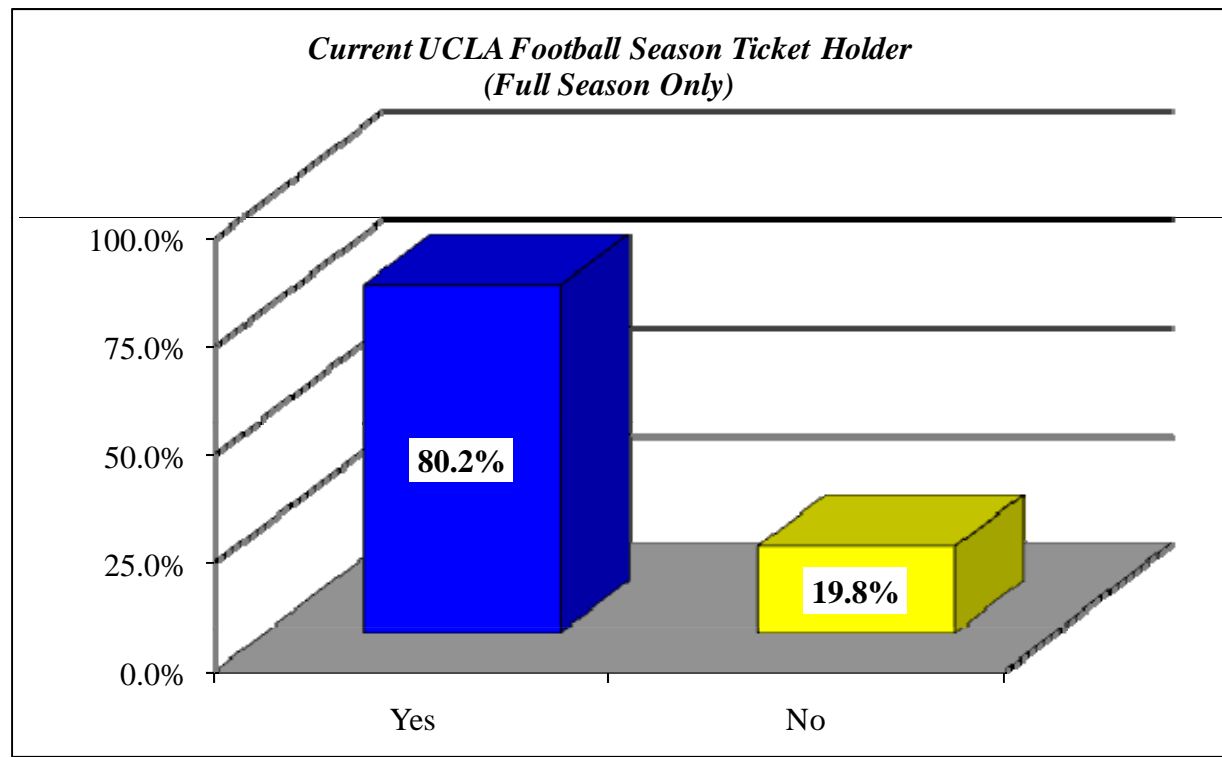
- Completed Surveys by UCLA Donor Membership Levels (Please Note Donors May Belong to More than One Level):



A. Completed Surveys

Completed Surveys

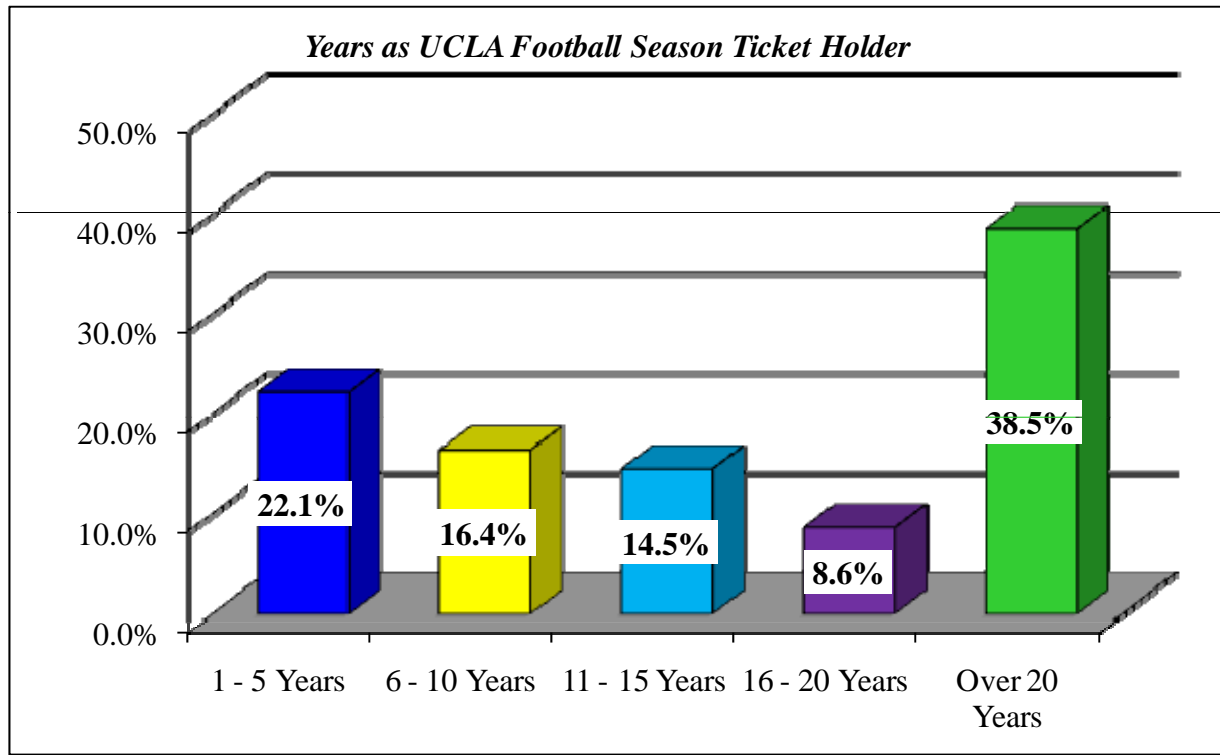
- Distribution of Current UCLA Football Season Ticket Holders



A. Completed Surveys

Completed Surveys

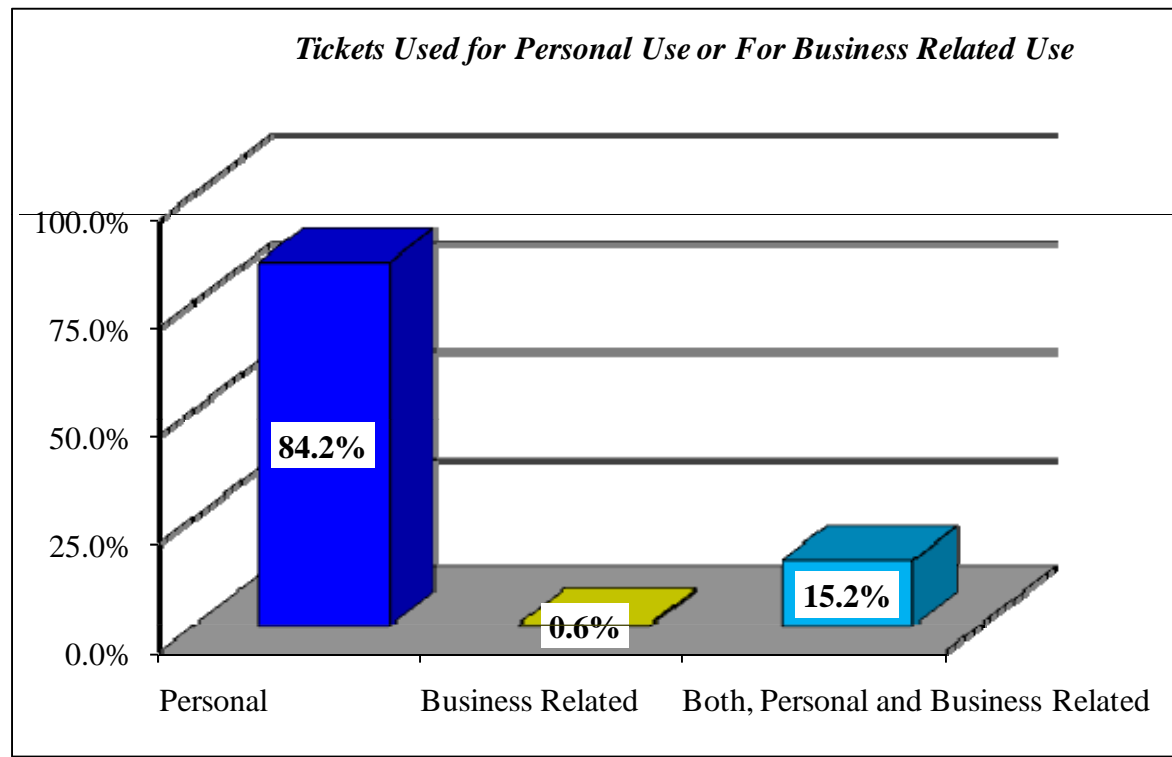
- Distribution of Current UCLA Football Season Ticket Holders by Number of Years



A. Completed Surveys

Completed Surveys

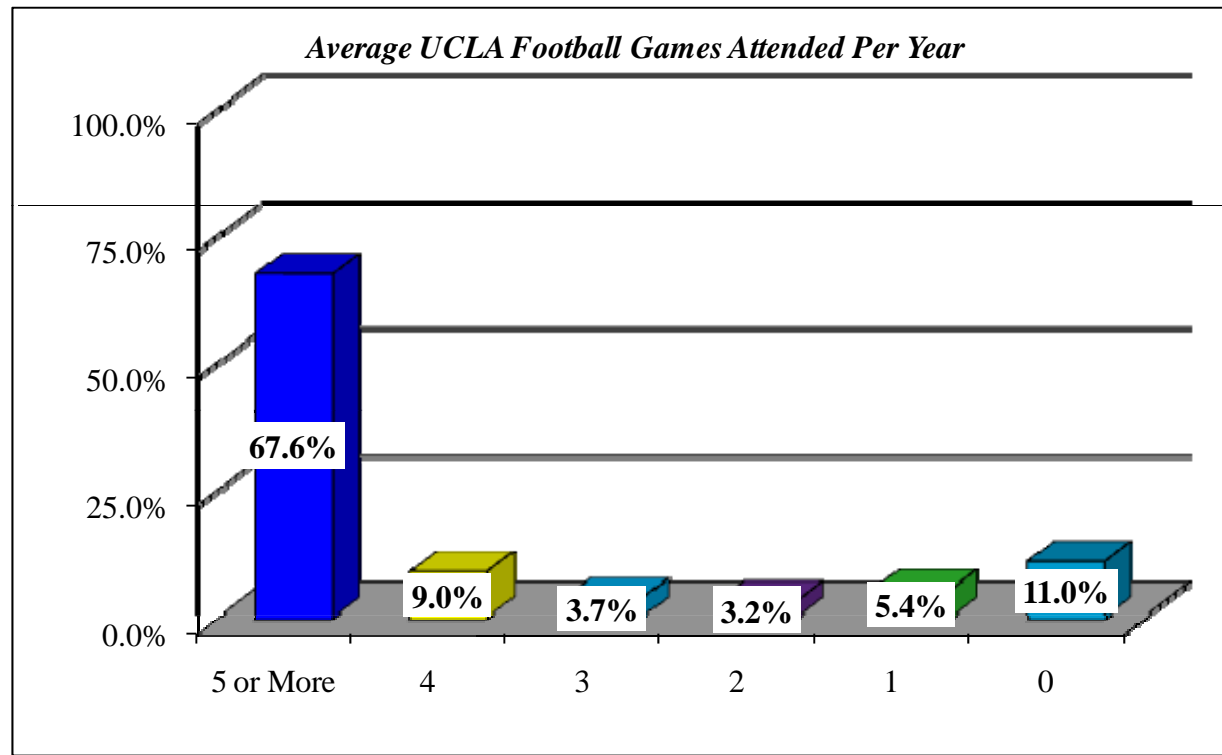
- Primary Reasons for Tickets Usage



A. Completed Surveys

Completed Surveys

- UCLA Football Games Attended Annually

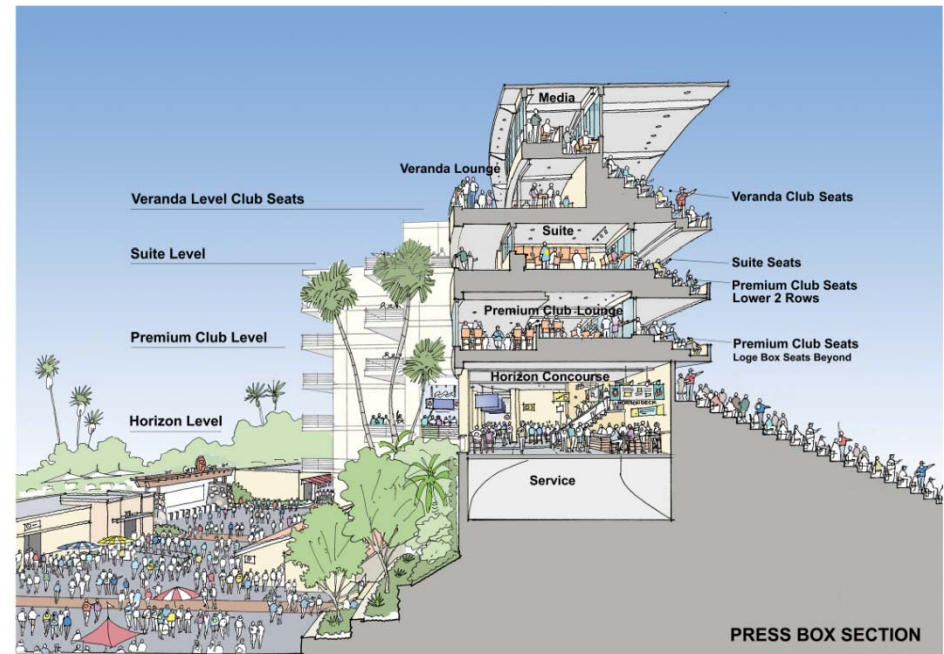


A. Completed Surveys

Seating Categories

- BSG Evaluated Potential Demand and Pricing for Several Seating Categories and Lounges:

- ✓ Premium Seating
 - Luxury Suites
 - Loge Boxes
 - Premium Club Level Seats
 - Veranda Club Level Seats
- ✓ Lounge Memberships
 - Field Level Lounge
 - Horizon Level Lounge



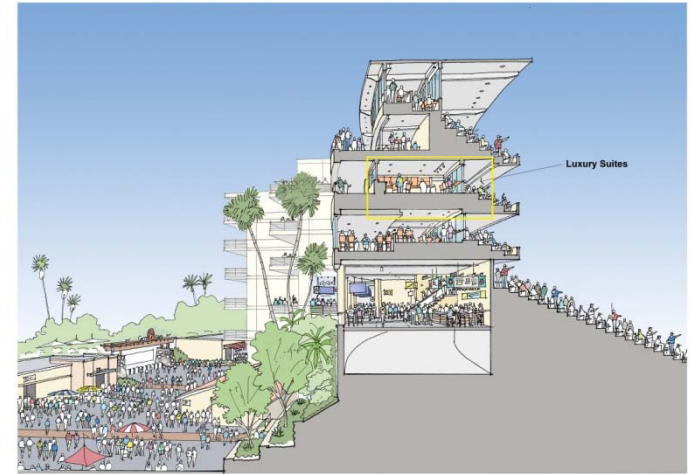
B. Luxury Suites

Luxury Suites

➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ 12 to 16 Total Seats
- ✓ Exclusive/Private Entrances
- ✓ Exclusive Lounge Areas
- ✓ Climate Control
- ✓ Upscale Furnishings
- ✓ Wider, Padded Comfortable Seats
- ✓ Excellent Sight Lines
- ✓ Television Monitors
- ✓ Upscale Food and Catering Services
- ✓ Ability to Purchase Alcohol
- ✓ Concierge Service
- ✓ Private Restrooms (Suite Level or In-Suite)
- ✓ Wet Bar
- ✓ Telephones
- ✓ Ice Makers

*Luxury Suite
Location*



*Luxury Suite Seating Area
Sample*



B. Luxury Suites

Luxury Suites – Summary of Findings

- Respondents were Asked if they Would Potentially be Interested in Leasing State-of-the-Art Luxury Suites at the Rose Bowl
- Respondents were Advised that Luxury Suite Included 14 Season Tickets to UCLA Football and Rights to Purchase Tickets to the Rose Bowl Game, BCS National Championship Game, and Other Events
- Interest in Purchasing Luxury Suites – Before Pricing
 - ✓ Approximately 30% (874) of Respondents Indicated Some Interest
- Desired Seats Per Luxury Suite
 - ✓ Approximately 65% (564) of Respondents Prefer 10 or 12 Seats
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$85,000 – 33% (285)
 - ✓ \$70,000 – 37% (321)
 - ✓ \$55,000 – 44% (386)

B. Luxury Suites

Luxury Suites – Summary of Findings

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$55,000 Level as Indicated by Definitely Yes/Probably Yes Respondents (6% to 18%)

- Interest in Suite Sharing or Co-Op Opportunities (Price Below Lowest Level)
 - ✓ Approximately 80% (389) of Respondents Interested in Suite Sharing

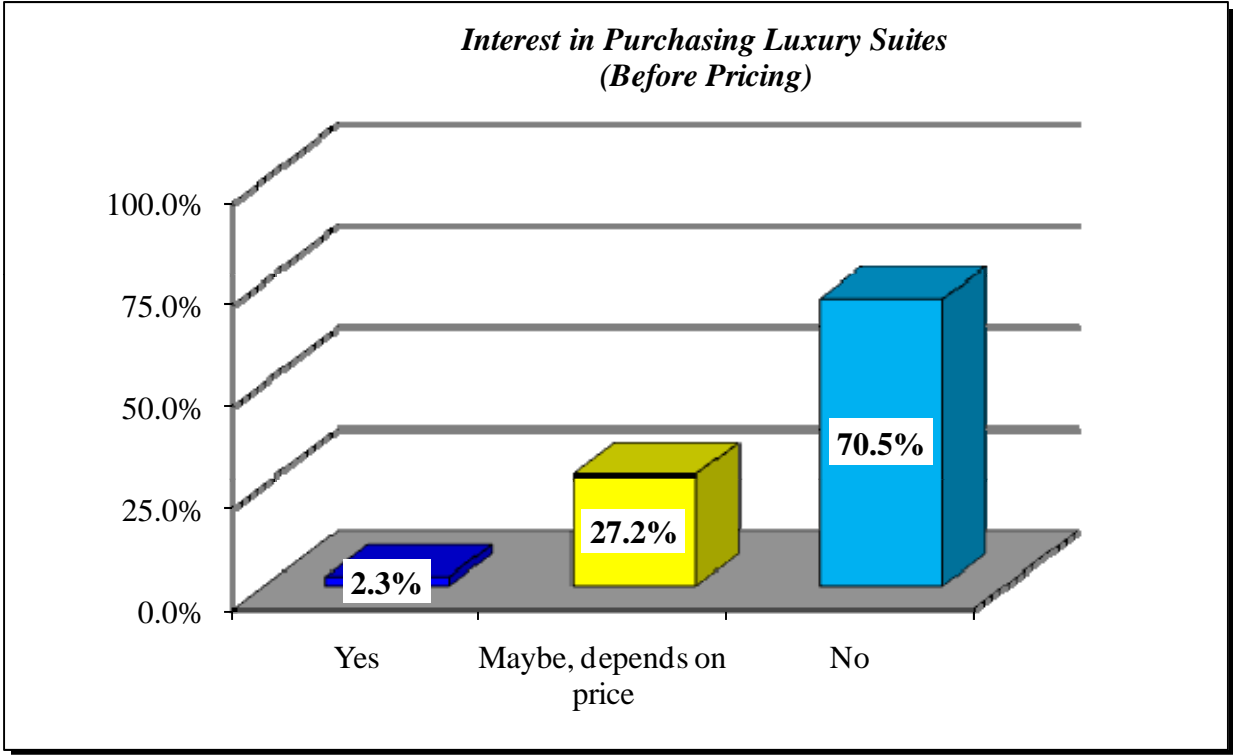
- Interest if Only UCLA Football were Included (Price Below Lowest Level)
 - ✓ Approximately 47% (231) of Respondents Interested in UCLA-Only Suite

- Commitment Term
 - ✓ Respondents Indicated a Preference for Shorter Commitment Terms (3 to 5 Years), but Some Demand Does Exist for Longer Commitment Terms (7 to 10 Years)

Please See Support Tables for Findings by Category

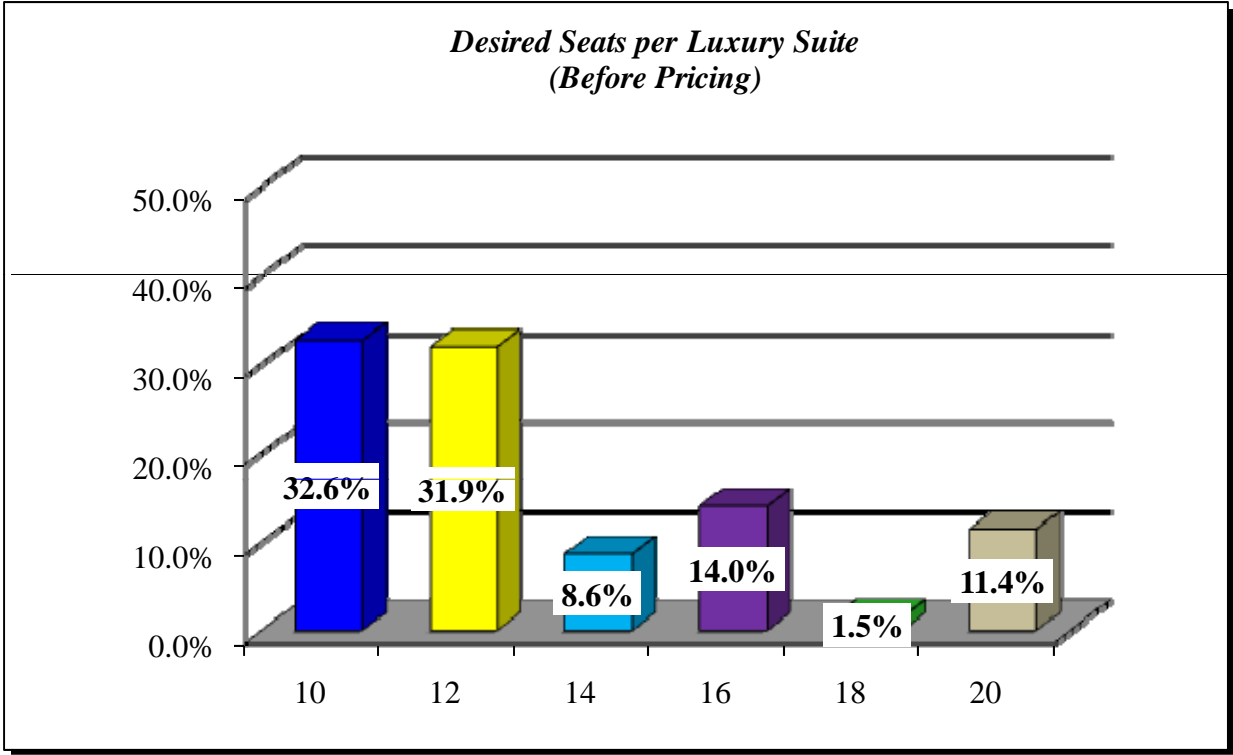
B. Luxury Suites

Luxury Suite Interest (Before Price) – Total (2,966)



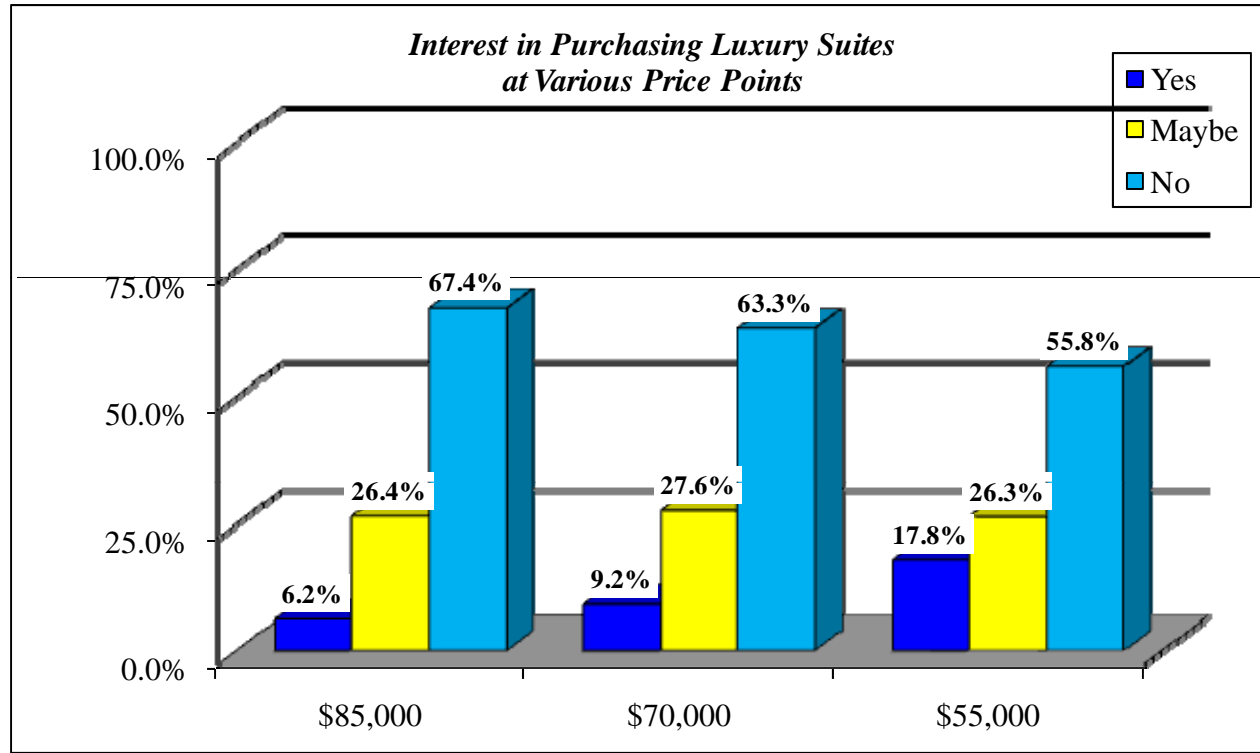
B. Luxury Suites

Desired Seats per Luxury Suite – Total (874)



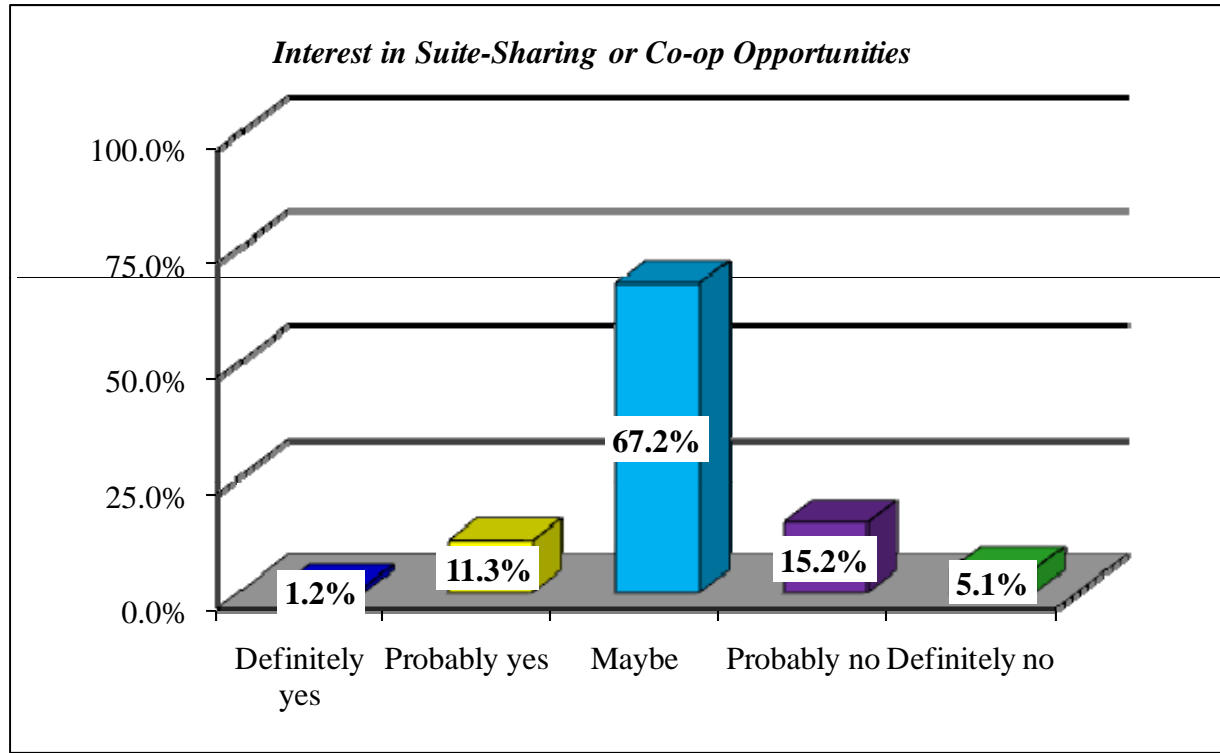
B. Luxury Suites

Interest Level at Various Price Points – Total (874)



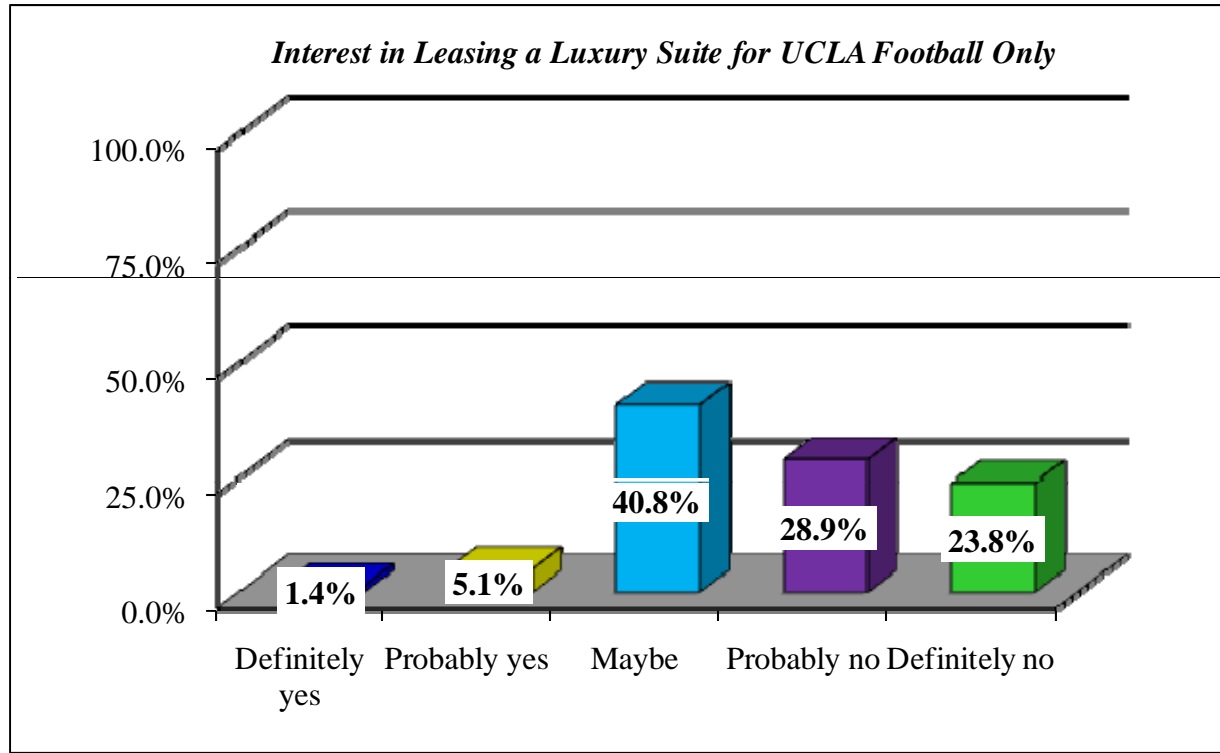
B. Luxury Suites

Interest in Suite Sharing or Co-op Opportunities – Total (488)



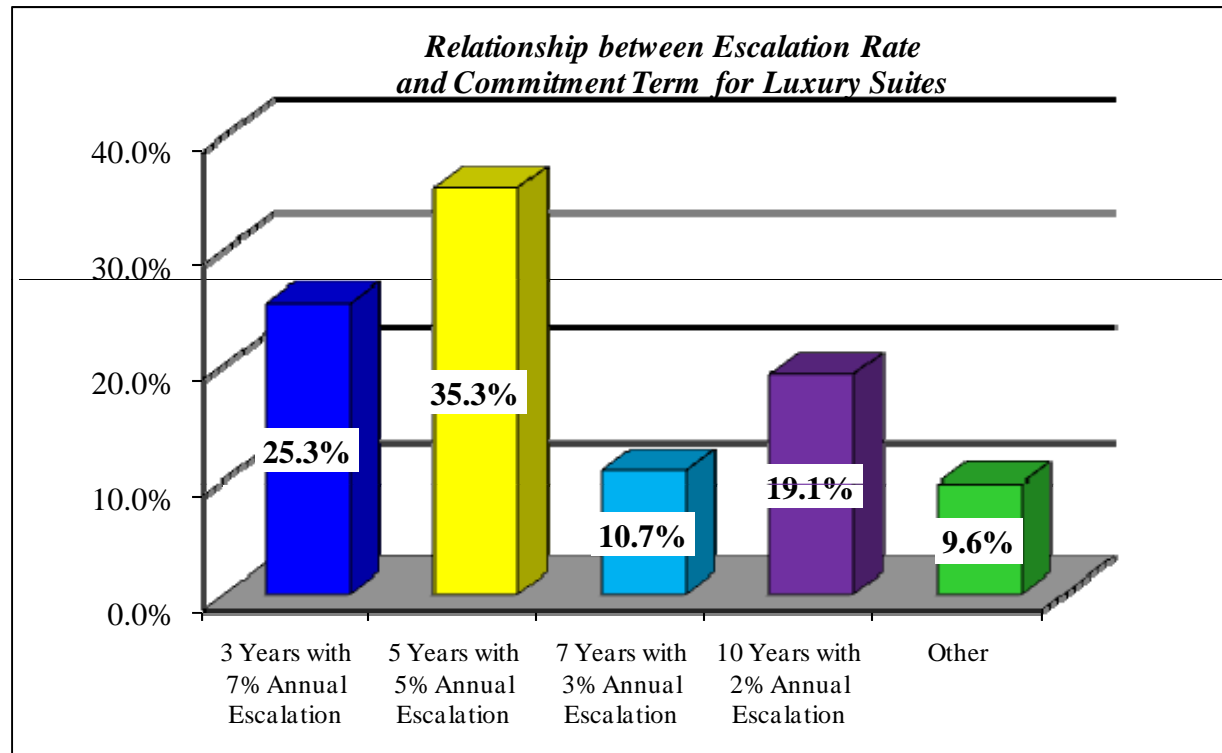
B. Luxury Suites

Interest in Luxury Suite for UCLA Football Only – Total (488)



B. Luxury Suites

Impact of Escalation Rates on Length of Commitment Term – Total



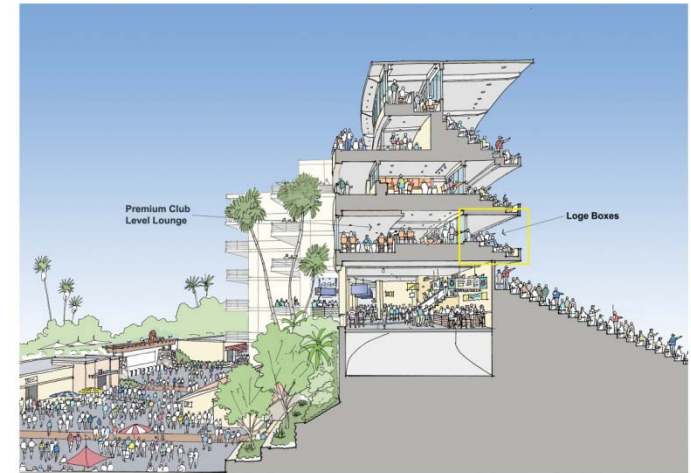
C. Loge Boxes

Loge Boxes

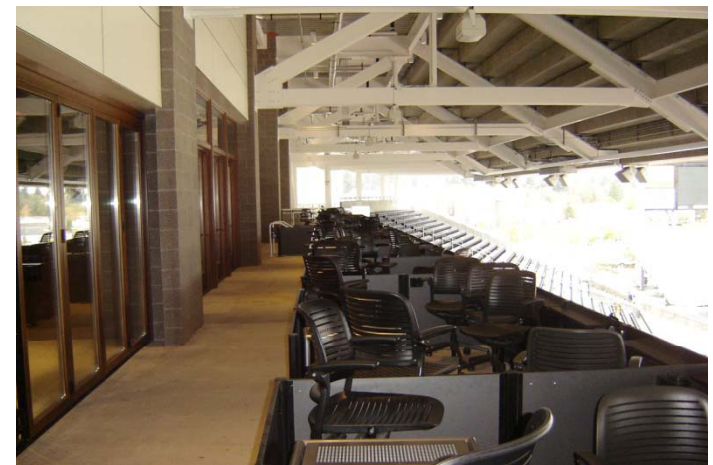
➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ 4 to 6 Seats
- ✓ Excellent sight lines
- ✓ Exclusive/private entrances
- ✓ Exclusive lounge areas
- ✓ Wider, padded comfortable seats on wheels
- ✓ Drink rails/counters
- ✓ Television monitors
- ✓ Waiter/waitress service
- ✓ Upscale food and catering services
- ✓ Ability to purchase alcohol in private lounge area
- ✓ Preferred parking
- ✓ Access to restricted area restrooms

*Loge Box
Location*



*Loge Box Seating Area
Sample*



C. Loge Boxes

Loge Boxes – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Purchasing Loge Boxes at the Rose Bowl
- Survey Respondents were Advised that Loge Boxes Would Include Season Tickets to UCLA Football and the Right to Purchase Tickets to Rose Bowl Game, BCS Championship Game, and Other Events
- Interest in Purchasing Loge Box – Before Pricing
 - ✓ Approximately 48% (1,425) of Respondents Indicated Some Interest
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$25,000 – 32% (455)
 - ✓ \$20,000 – 35% (503)
 - ✓ \$15,000 – 48% (677)

C. Loge Boxes

Loge Boxes – Summary of Findings

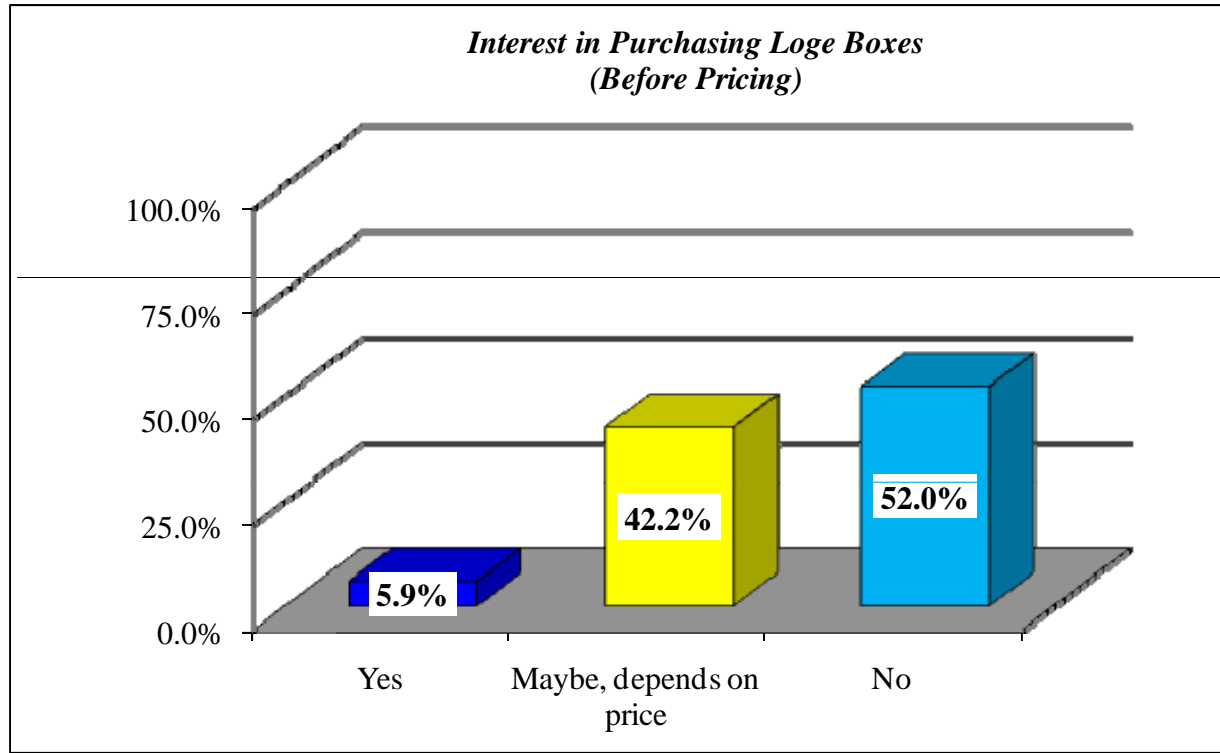
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$15,000 Level as Indicated by Definitely Yes/Probably Yes Respondents (8% to 19%)

- Commitment Term
 - ✓ Respondents Indicated a Preference for Shorter Commitment Terms (3 to 5 Years), but Some Demand Does Exist for Longer Commitment Terms (7 to 10 Years)

Please See Support Tables for Findings by Category

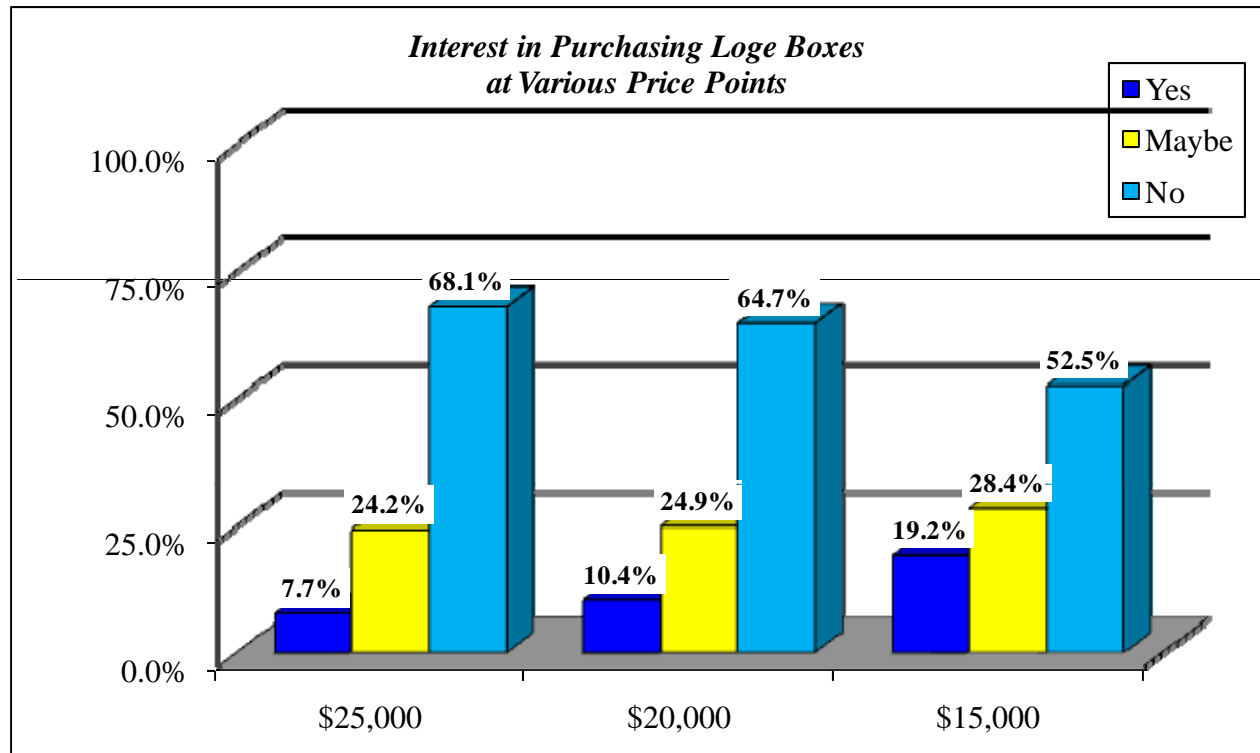
C. Loge Boxes

Loge Box Interest (Before Price) – Total (2,966)



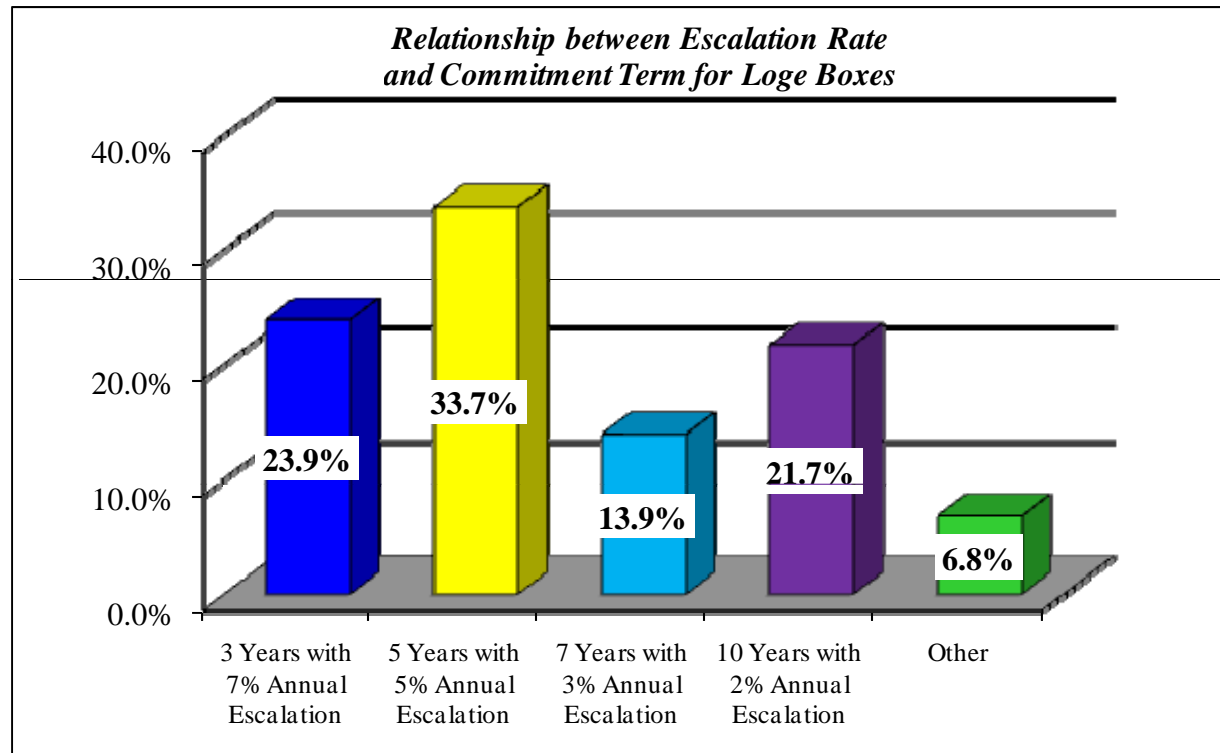
C. Loge Boxes

Interest Level at Various Price Points – Total (1,425)



C. Loge Boxes

Impact of Escalation Rates on Length of Commitment Term – Total



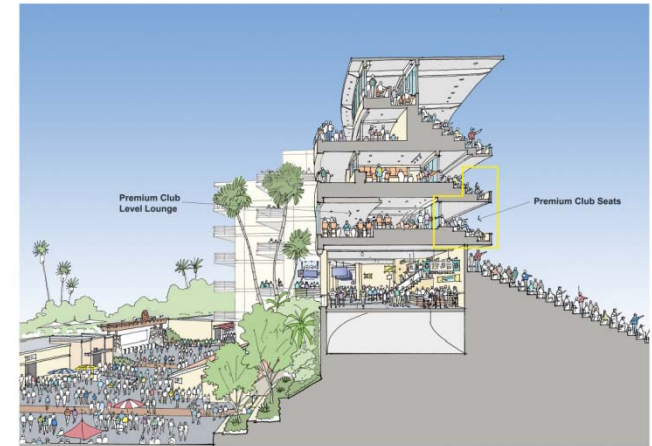
D. Premium Level Club Seats

Premium Level Club Seats

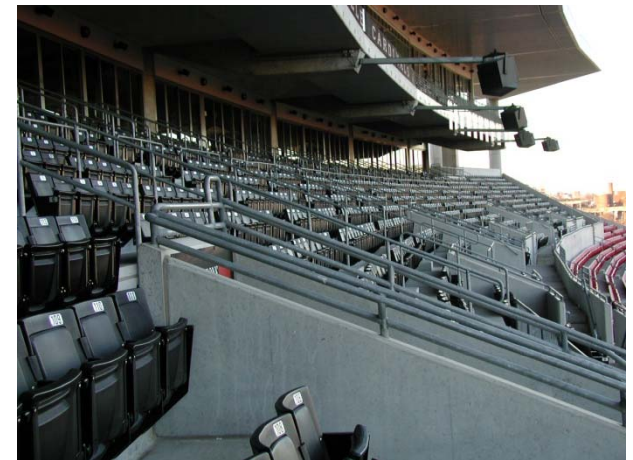
➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ Exclusive lounge areas
- ✓ Exclusive/private entrances
- ✓ Climate controlled area
- ✓ Wider, padded comfortable seats and cup holders
- ✓ Television monitors
- ✓ Upscale food services
- ✓ Private concessions areas
- ✓ Ability to purchase alcohol
- ✓ Preferred parking
- ✓ Access to restricted area restrooms

*Premium Level Club Seats
Location*



*Premium Level Club Seats
Sample*



D. Premium Level Club Seats

Premium Level Club Seats – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Premium Level Club Seats at the Rose Bowl Stadium

- Survey Respondents were Advised that Premium Level Club Seats Would Include Season Tickets to UCLA Football and the Right to Purchase Tickets to Rose Bowl Game, BCS Championship Game, and Other Events

- Interest in Premium Level Club seats (Before Pricing)
 - ✓ Approximately 57% (1,680) of Respondents Indicated Some Interest

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$4,500 – 36% (603)
 - ✓ \$4,000 – 39% (646)
 - ✓ \$3,500 – 48% (812)

D. Premium Level Club Seats

Premium Level Club Seats – Summary of Findings

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$3,500 Level as Indicated by Definitely Yes/Probably Yes Respondents (9% to 18%)

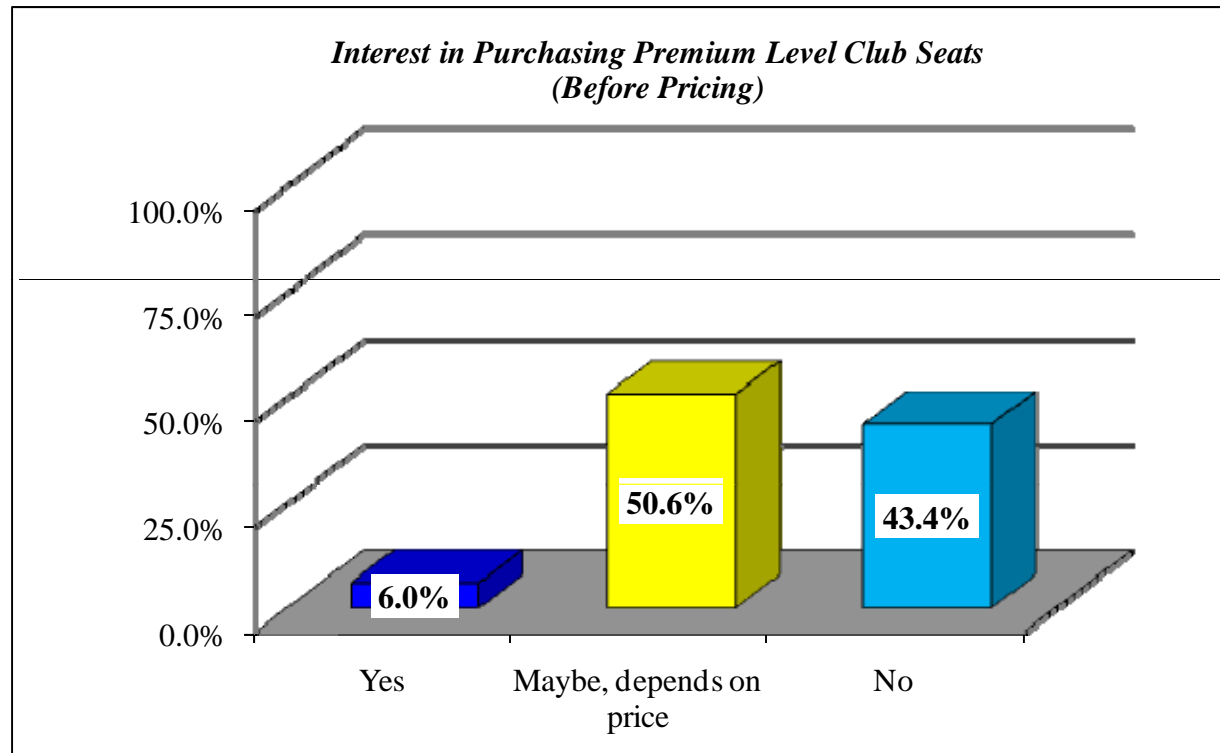
- Number of Seats Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 4.3 (\$4,500) to 3.6 (\$3,500) Premium Level Club Seats

- Commitment Term
 - ✓ Respondents Indicated a Preference for Shorter Commitment Terms (3 to 5 Years), but Some Demand Does Exist for Longer Commitment Terms (7 to 10 Years)

Please See Support Tables for Findings by Category

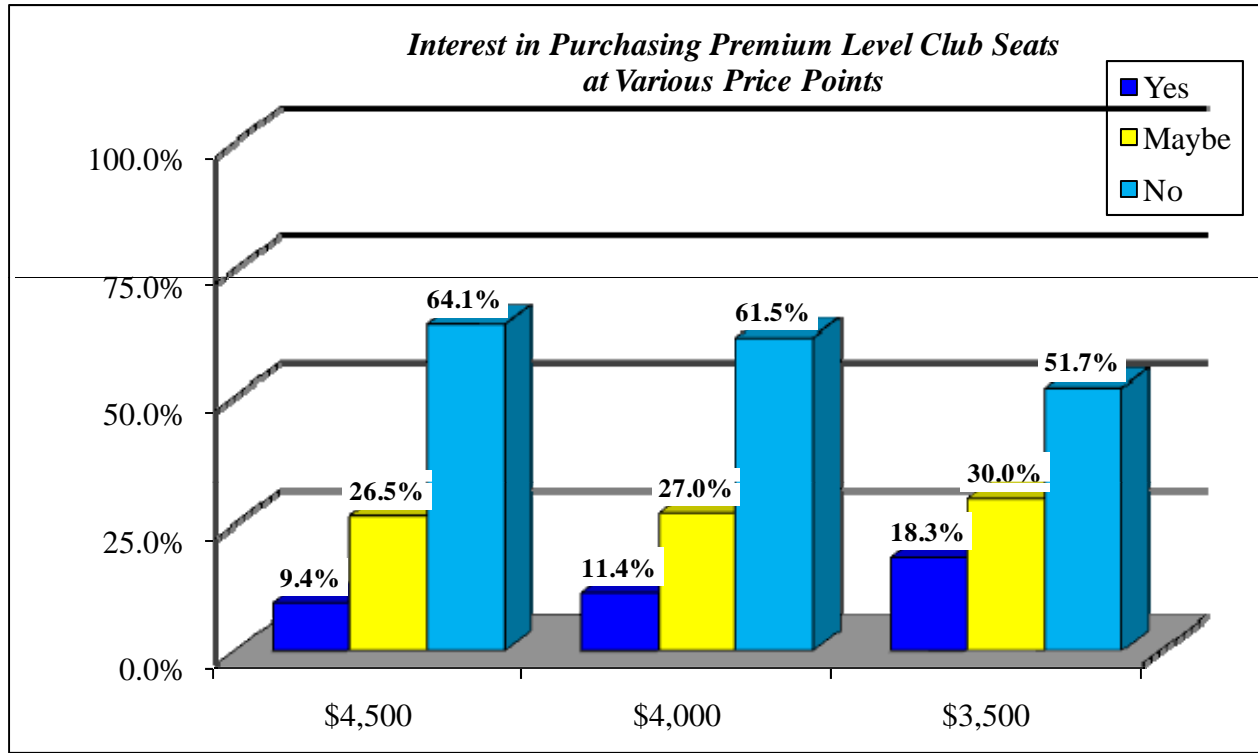
D. Premium Level Club Seats

Premium Level Club Seats (Before Price) – Total (2,966)



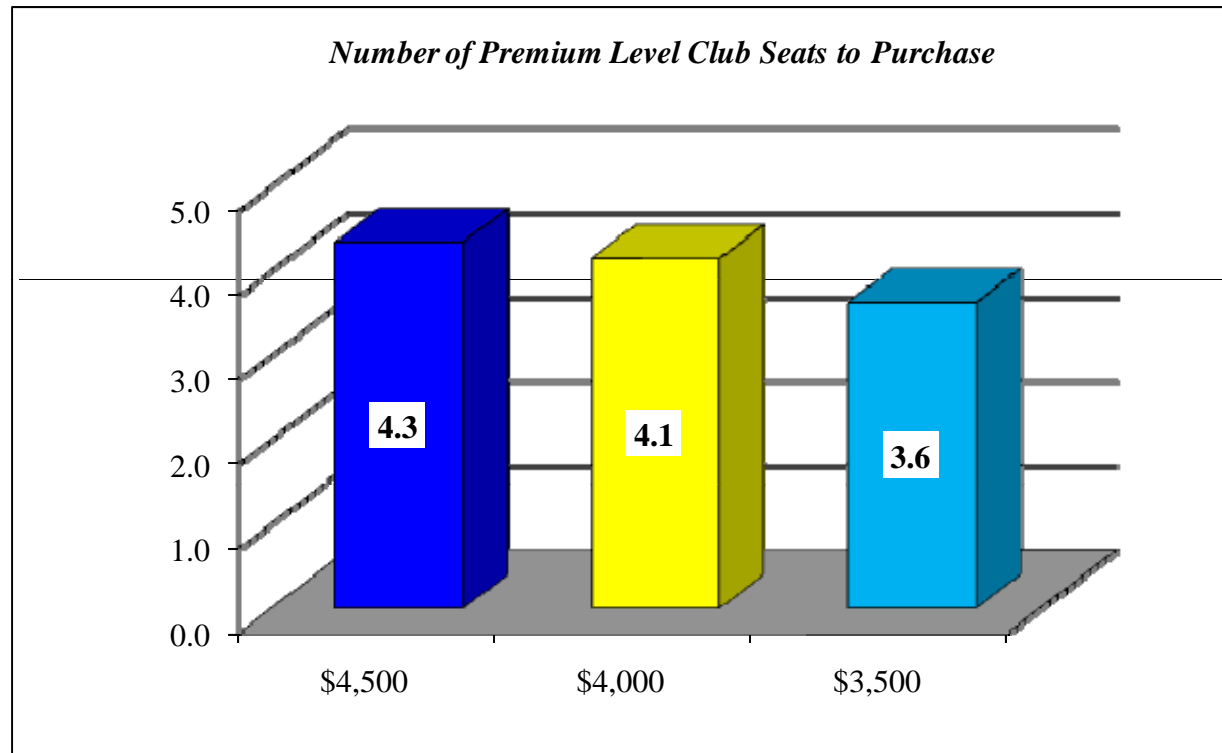
D. Premium Level Club Seats

Interest Level at Various Price Points – Total (1,680)



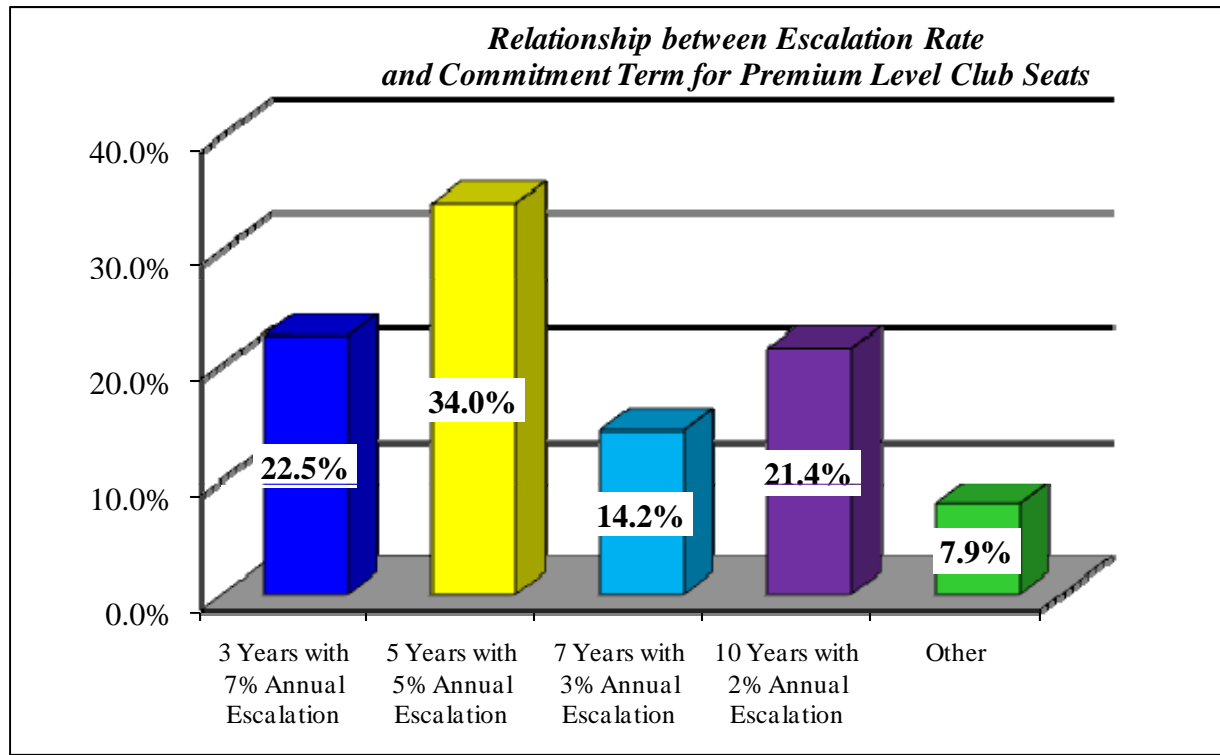
D. Premium Level Club Seats

Number of Premium Level Club Seats – Total



D. Premium Level Club Seats

Impact of Escalation Rates on Length of Commitment Term – Total



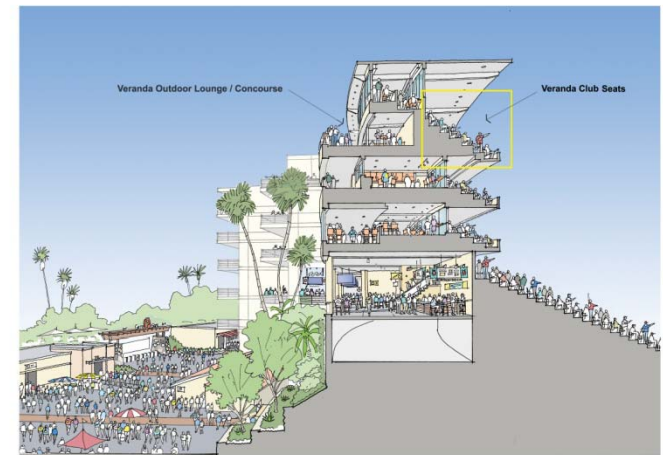
E. Veranda Level Club Seats

Veranda Level Club Seats

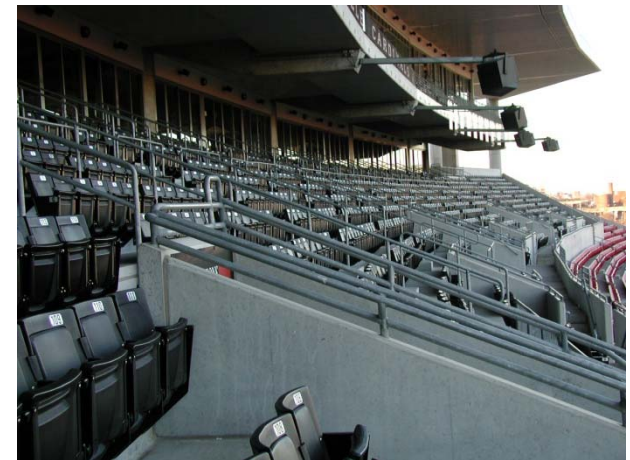
➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ Exclusive lounge areas
- ✓ Exclusive/private entrances
- ✓ Climate controlled area
- ✓ Wider, padded comfortable seats and cup holders
- ✓ Television monitors
- ✓ Upscale food services
- ✓ Private concessions areas
- ✓ Ability to purchase alcohol
- ✓ Preferred parking
- ✓ Access to restricted area restrooms

*Veranda Level Club Seats
Location*



*Veranda Level Club Seats
Sample*



E. Veranda Level Club Seats

Veranda Level Club Seats – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Veranda Level Club Seats at the Rose Bowl Stadium

- Survey Respondents were Advised that Veranda Level Club Seats Would Include Season Tickets to UCLA Football and the Right to Purchase Tickets to Rose Bowl Game, BCS Championship Game, and Other Events

- Interest in Veranda Level Club seats (Before Pricing)
 - ✓ Approximately 49% (1,465) of Respondents Indicated Some Interest

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$3,000 – 38% (552)
 - ✓ \$2,500 – 43% (627)
 - ✓ \$2,000 – 61% (891)

E. Veranda Level Club Seats

Veranda Level Club Seats – Summary of Findings

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$2,000 Level as Indicated by Definitely Yes/Probably Yes Respondents (9% to 21%)

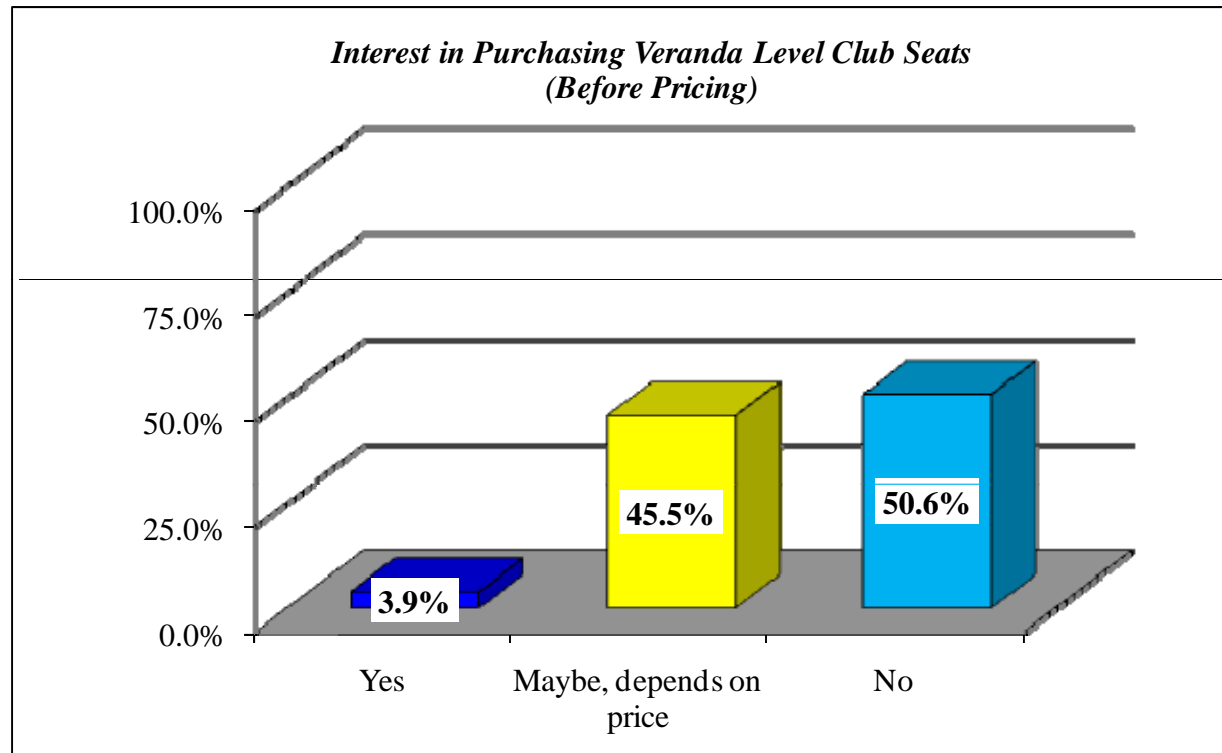
- Number of Seats Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 4.4 (\$3,000) to 3.5 (\$2,000) Veranda Level Club Seats

- Commitment Term
 - ✓ Respondents Indicated a Preference for Shorter Commitment Terms (3 to 5 Years), but Some Demand Does Exist for Longer Commitment Terms (7 to 10 Years)

Please See Support Tables for Findings by Category

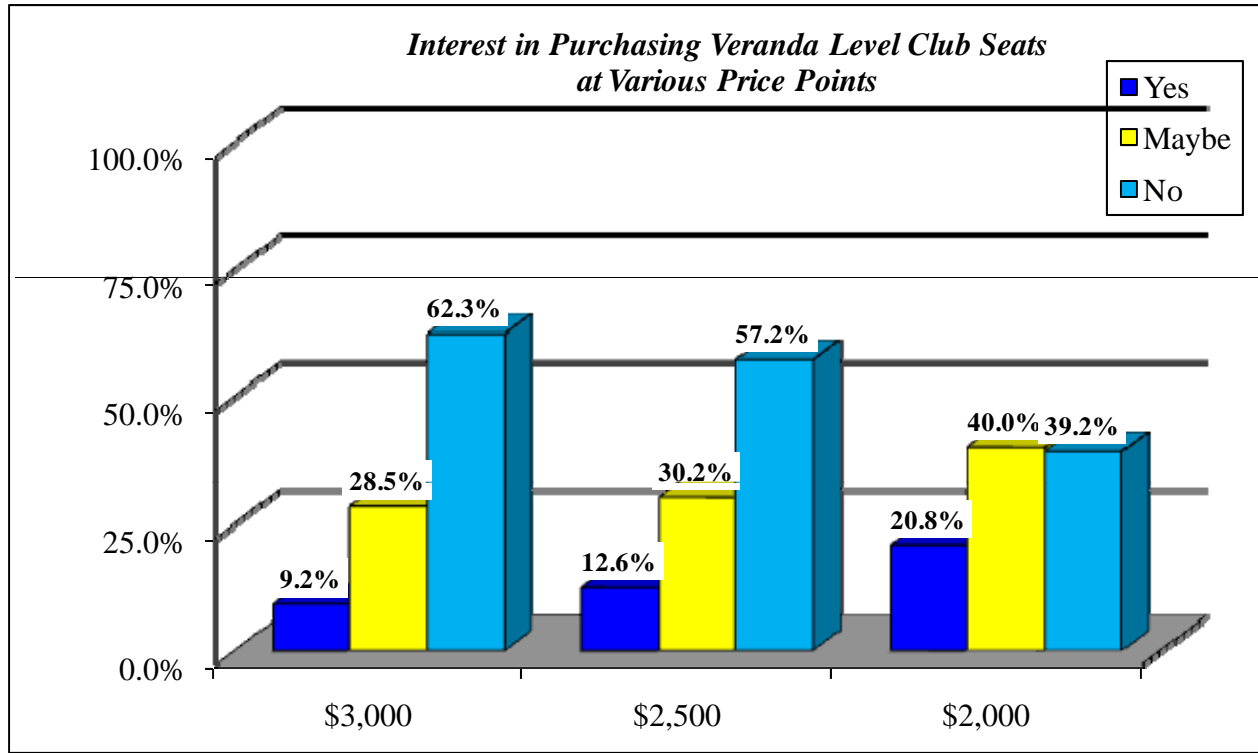
E. Veranda Level Club Seats

Veranda Level Club Seats (Before Price) – Total (2,966)



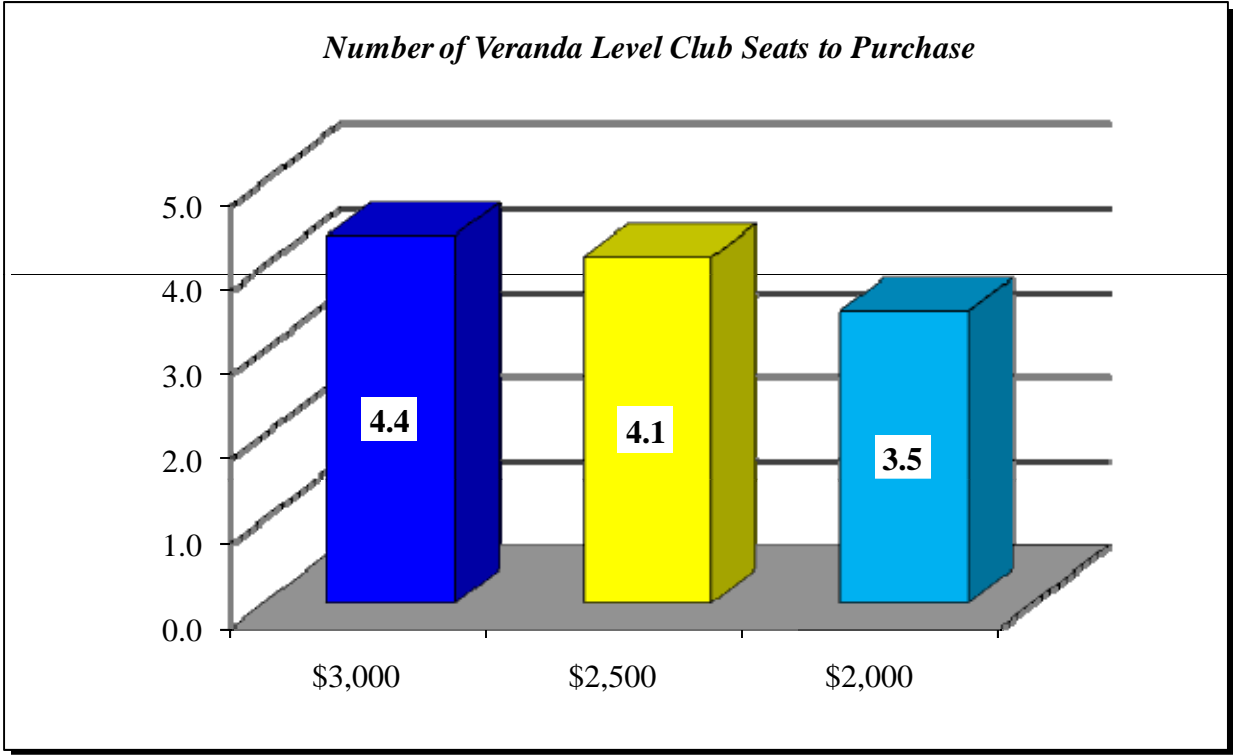
E. Veranda Level Club Seats

Interest Level at Various Price Points – Total (1,465)



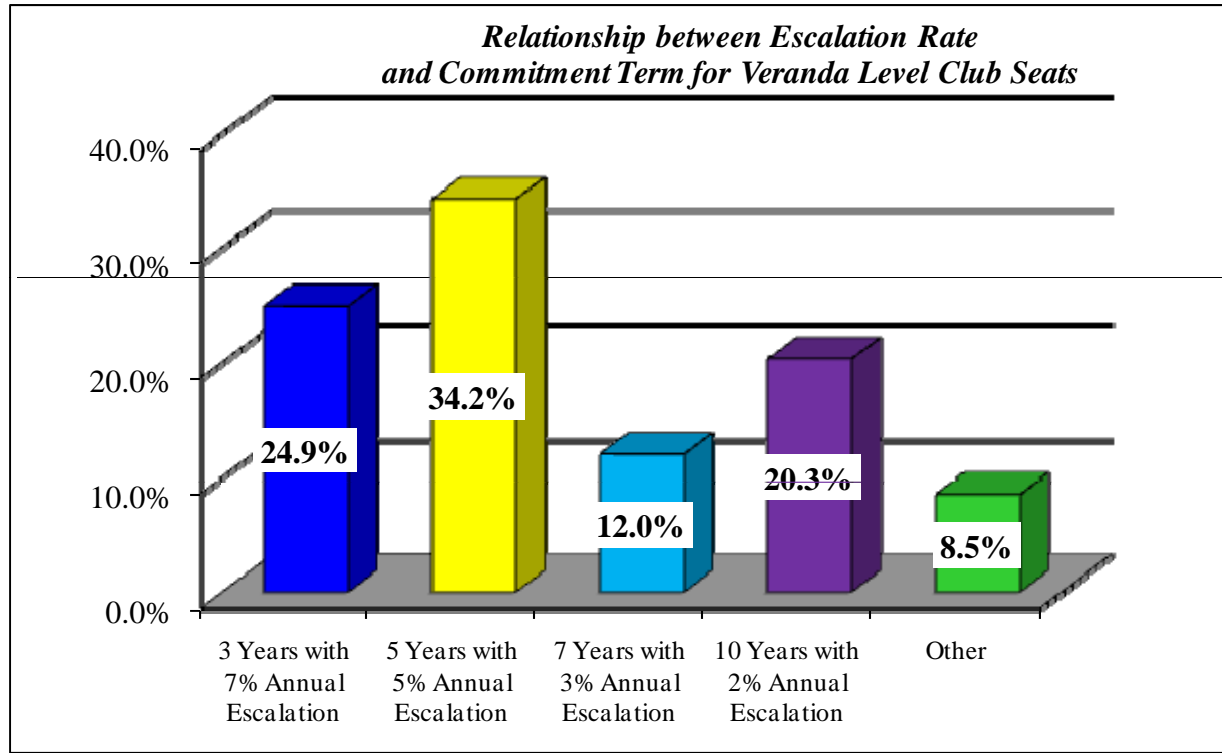
E. Veranda Level Club Seats

Number of Veranda Level Club Seats – Total



E. Veranda Level Club Seats

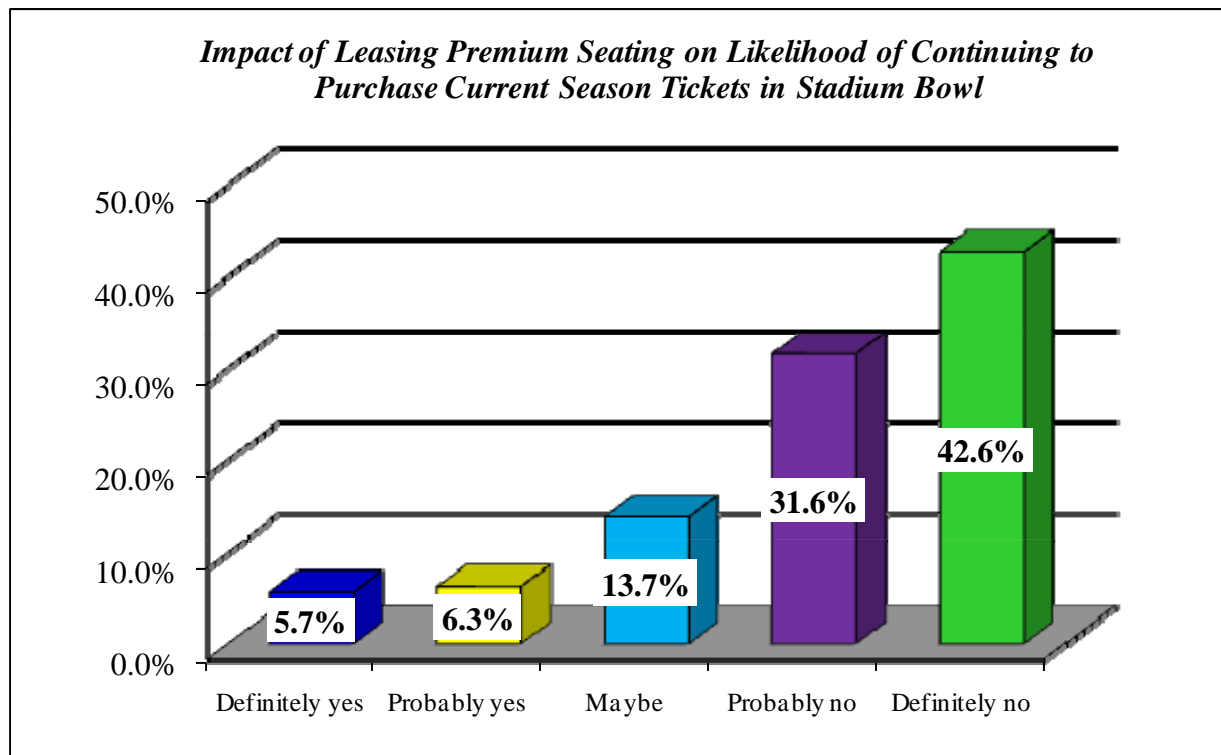
Impact of Escalation Rates on Length of Commitment Term – Total



F. Impact on Existing Seats

Impact on Existing Seats

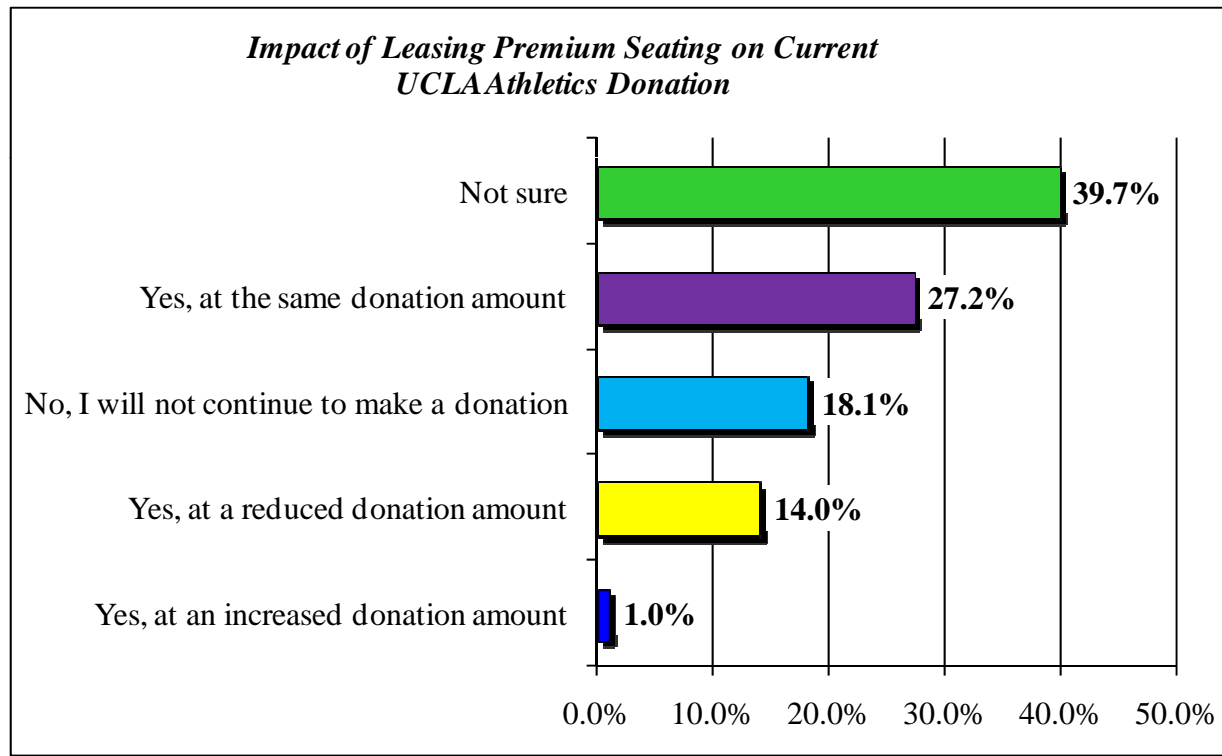
- Only 25% of Respondents Indicated that they Would Continue to Purchase their Current UCLA Football Season Tickets in the Stadium Bowl if they were to Lease New Premium Seating at the Rose Bowl



G. Impact on Current UCLA Donation

Impact on Current UCLA Donation

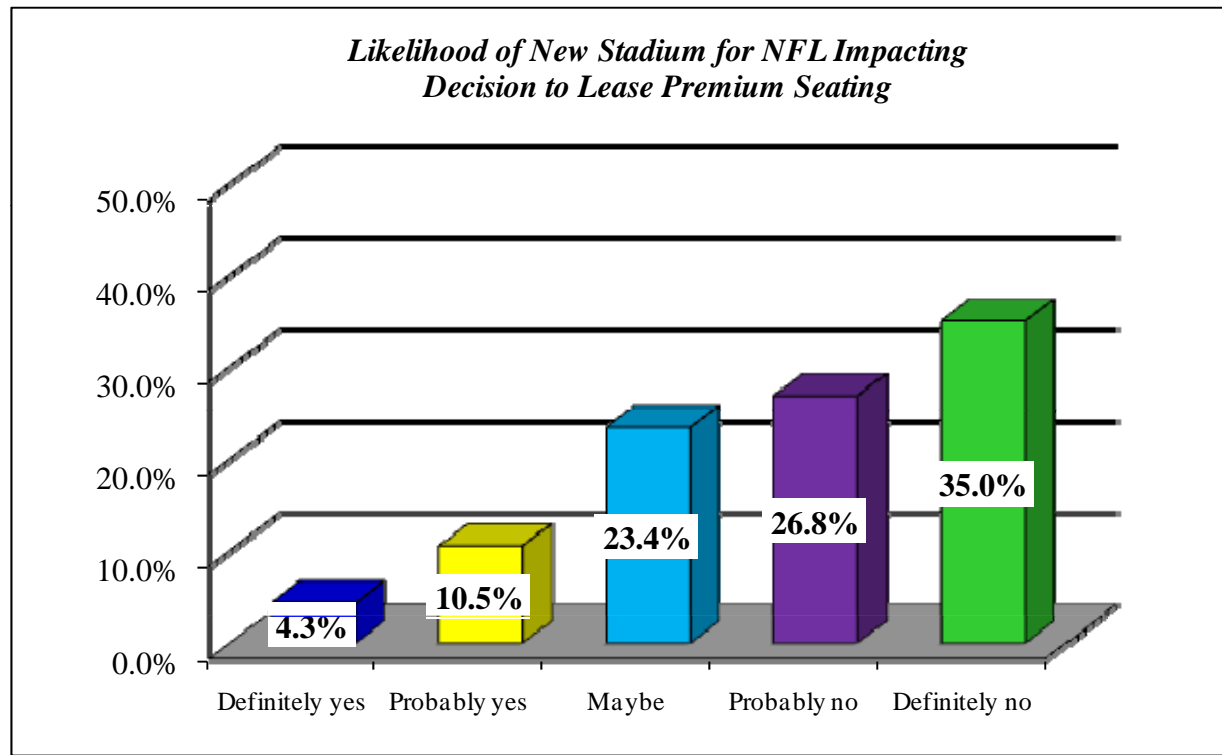
- A Significant Number of Respondents were Not Sure what Impact Leasing Premium Seating Would have on their Current UCLA Athletics Donation – Only 18% Indicated they Would Not Continue to Make a Donation



H. Impact of New NFL Stadium

Impact of New NFL Stadium

- Respondents Generally Indicated that their Interest in Premium Seating Would Not Change if a New Football Stadium were Built for an NFL Franchise



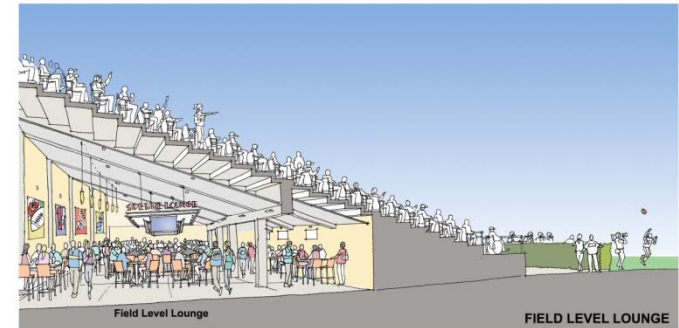
I. Field Level Lounge

Field Level Lounge

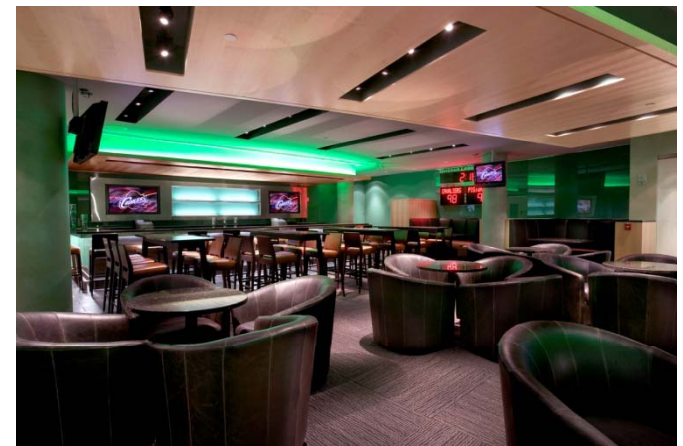
➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ Exclusive lounge areas
- ✓ Exclusive/private entrances
- ✓ Climate controlled area
- ✓ Television monitors
- ✓ Upscale food services
- ✓ Private concessions areas
- ✓ Ability to purchase alcohol
- ✓ Access to restricted area restrooms

*Field Level Lounge
Location*



*Field Level Lounge
Sample*



I. Field Level Lounge

Field Level Lounge – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Purchasing Field Level Lounge Memberships at the Rose Bowl Stadium
- Survey Respondents were Advised that Field Level Lounges Would be Located Under the Seating Bowl and Would Not have Views of the Playing Field
- Survey Respondents were Advised that the Cost of Field Level Lounge Memberships Would be Separate and In-Addition to Season Ticket Costs and Donation Requirements
- Interest in Field Level Lounge Memberships (Before Pricing)
 - ✓ Approximately 51% (1,521) of Respondents Indicated Some Interest
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$2,000 – 36% (541)
 - ✓ \$1,500 – 41% (618)
 - ✓ \$1,000 – 64% (966)

I. Field Level Lounge

Field Level Lounge – Summary of Findings

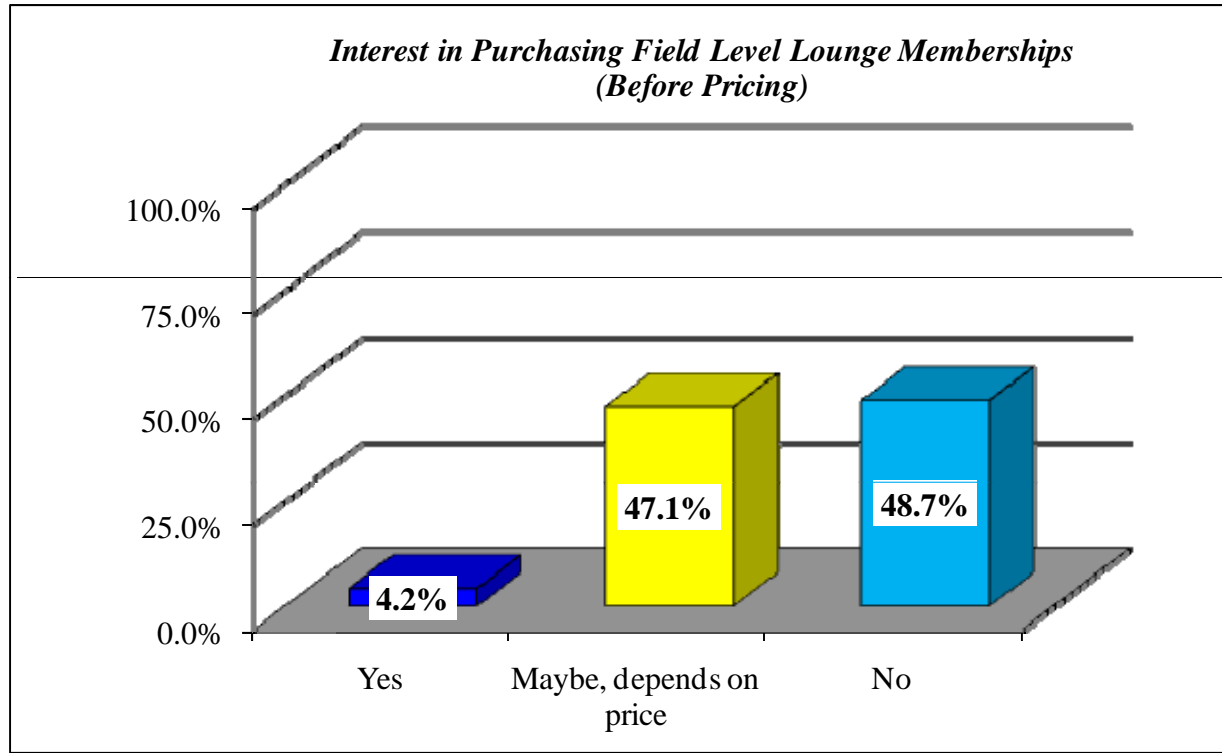
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$1,000 Level as Indicated by Definitely Yes/Probably Yes Respondents (8% to 23%)

- Number of Memberships Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 3.7 (\$2,000) to 2.8 (\$1,000) Field Level Lounge Memberships

Please See Support Tables for Findings by Category

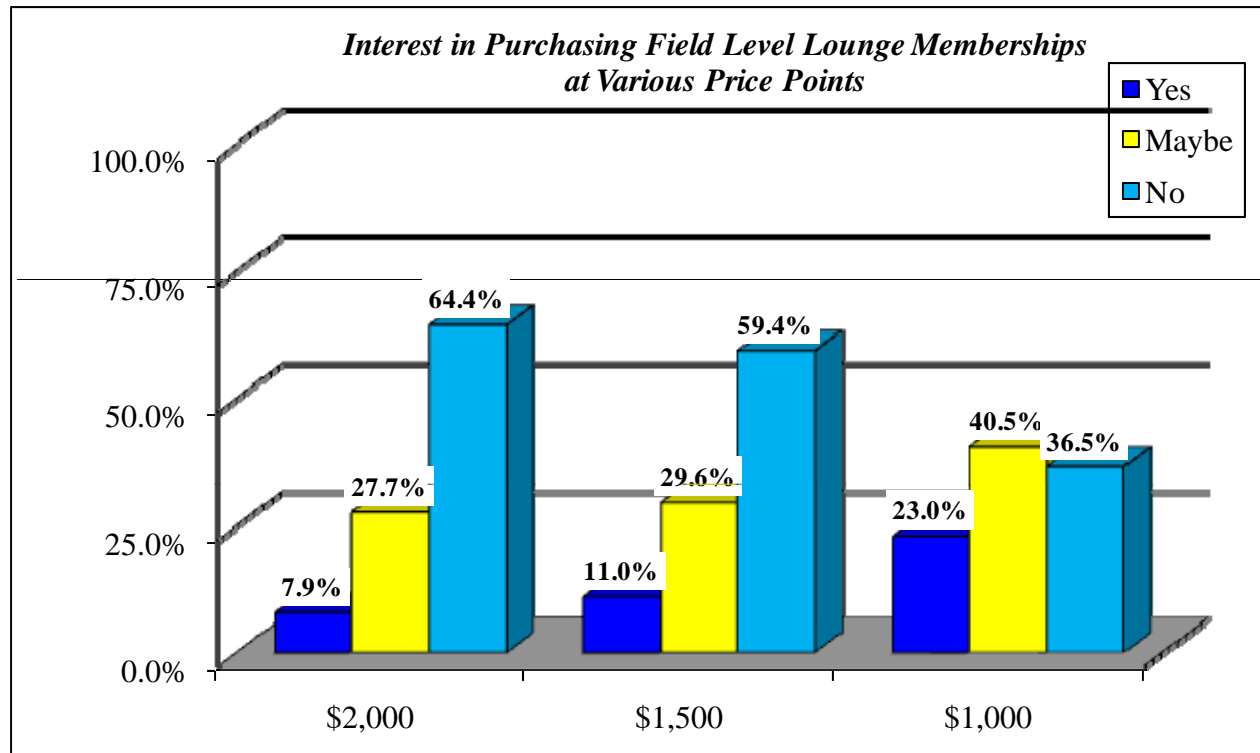
I. Field Level Lounge

Field Level Lounge Membership (Before Price) – Total (2,966)



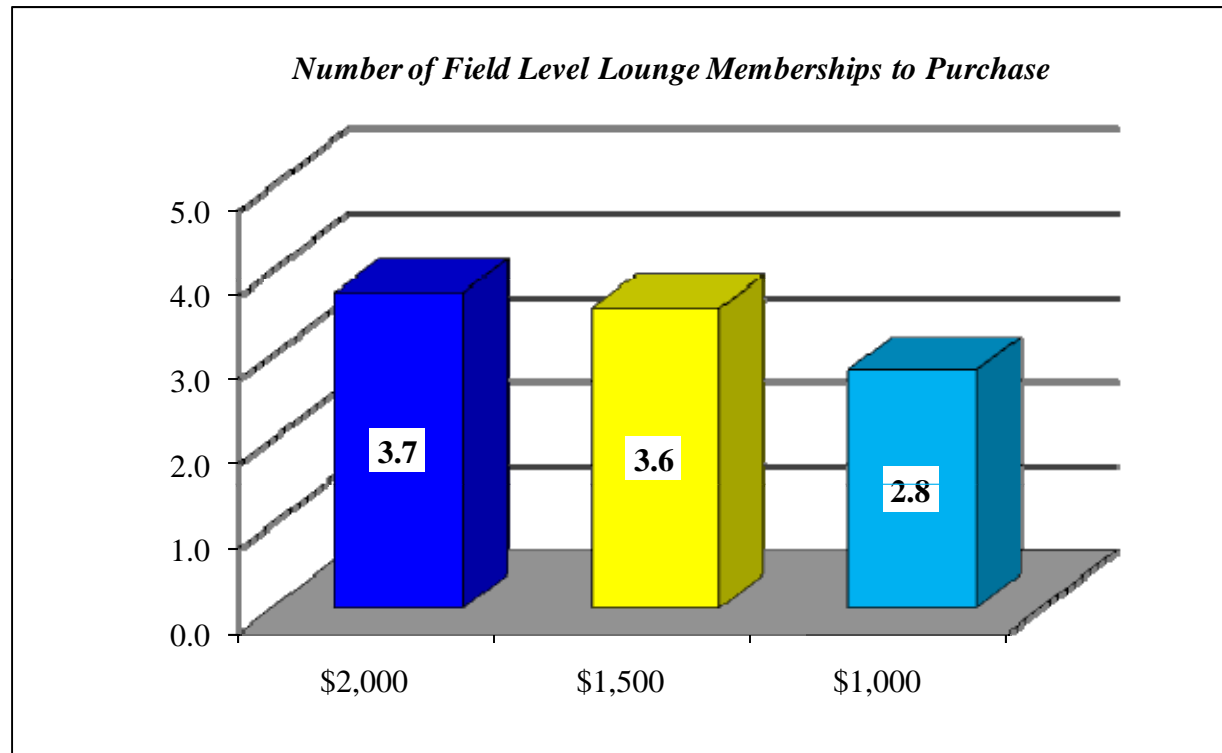
I. Field Level Lounge

Interest Level at Various Price Points – Total (1,521)



I. Field Level Lounge

Number of Field Level Lounge Memberships – Total



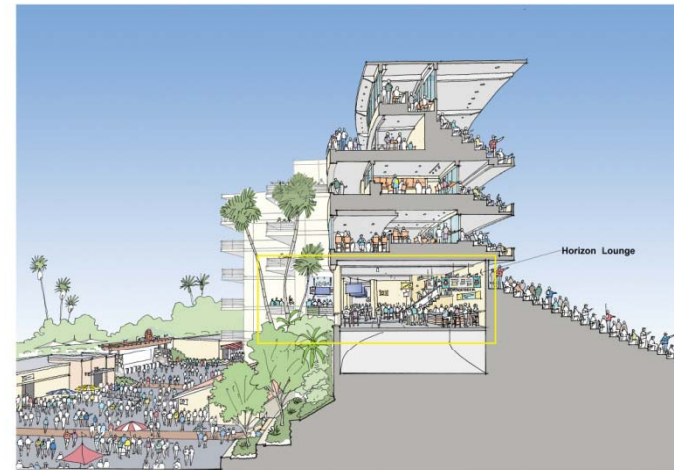
J. Horizon Level Lounge

Horizon Level Lounge

➤ Typical/Traditional Amenities (Per Survey Description)

- ✓ Exclusive lounge areas
- ✓ Exclusive/private entrances
- ✓ Climate controlled area
- ✓ Television monitors
- ✓ Upscale food services
- ✓ Private concessions areas
- ✓ Ability to purchase alcohol
- ✓ Access to restricted area restrooms

*Horizon Level Lounge
Location*



J. Horizon Level Lounge

Horizon Level Lounge – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Purchasing Horizon Level Lounge Memberships at the Rose Bowl Stadium
- Survey Respondents were Advised that Horizon Level Lounges Would be Located Directly Under the Press Box and Would Not have Views of the Playing Field
- Survey Respondents were Advised that the Cost of Horizon Level Lounge Memberships Would be Separate and In-Addition to Season Ticket Costs and Donation Requirements
- Interest in Horizon Level Lounge Memberships (Before Pricing)
 - ✓ Approximately 41% (1,206) of Respondents Indicated Some Interest
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$2,000 – 34% (414)
 - ✓ \$1,500 – 40% (483)
 - ✓ \$1,000 – 61% (740)

J. Horizon Level Lounge

Horizon Level Lounge – Summary of Findings

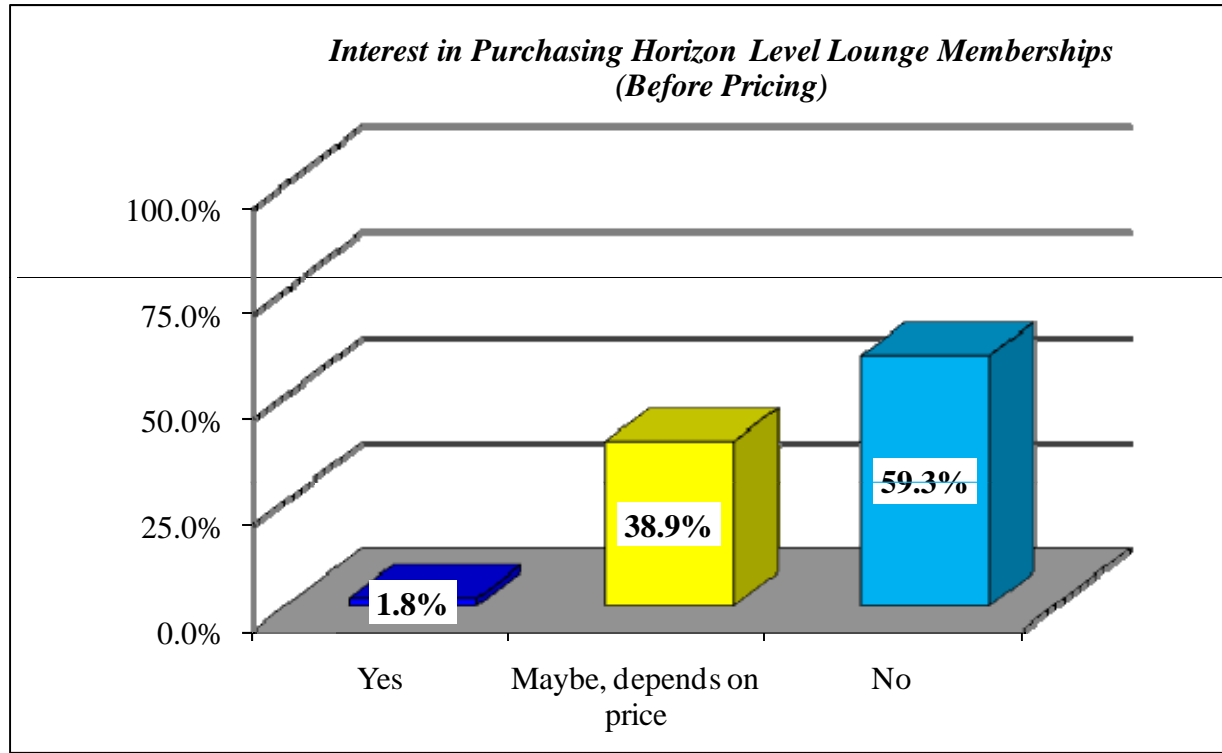
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$1,000 Level as Indicated by Definitely Yes/Probably Yes Respondents (6% to 19%)

- Number of Memberships Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 4.1 (\$2,000) to 2.9 (\$1,000) Horizon Level Lounge Memberships

Please See Support Tables for Findings by Category

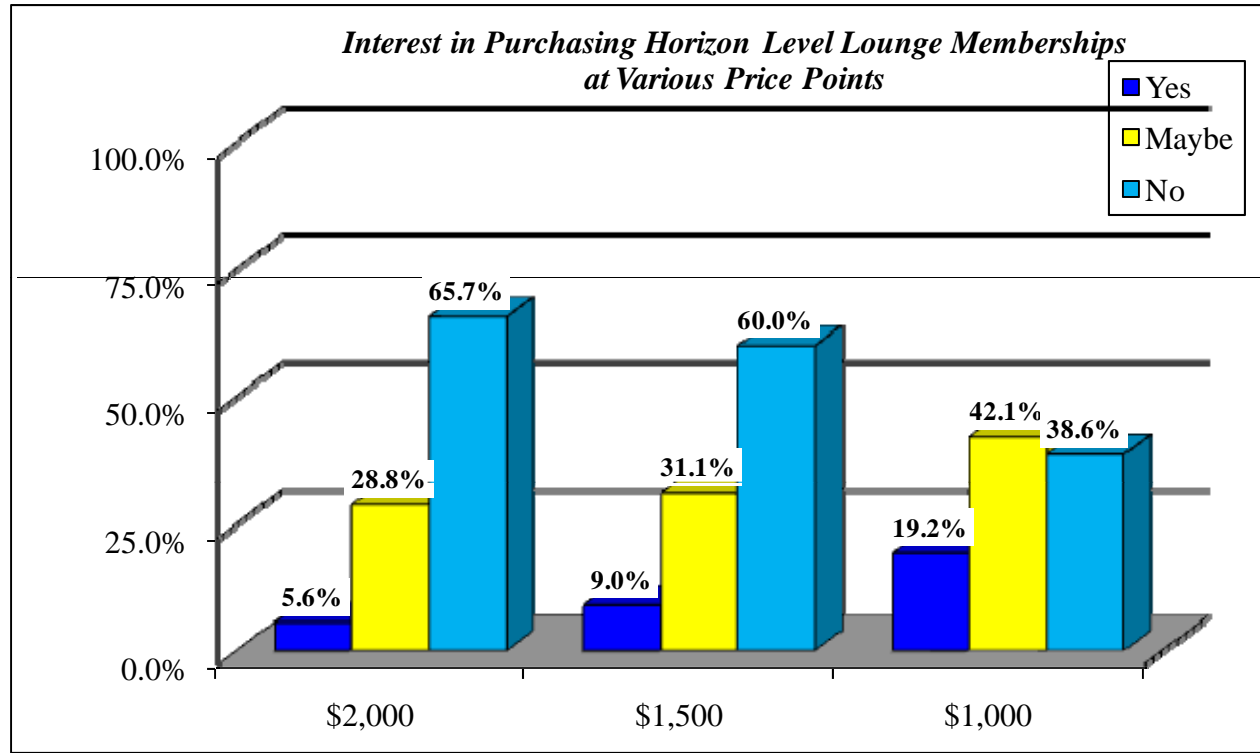
J. Horizon Level Lounge

Horizon Level Lounge Membership (Before Price) – Total (2,966)



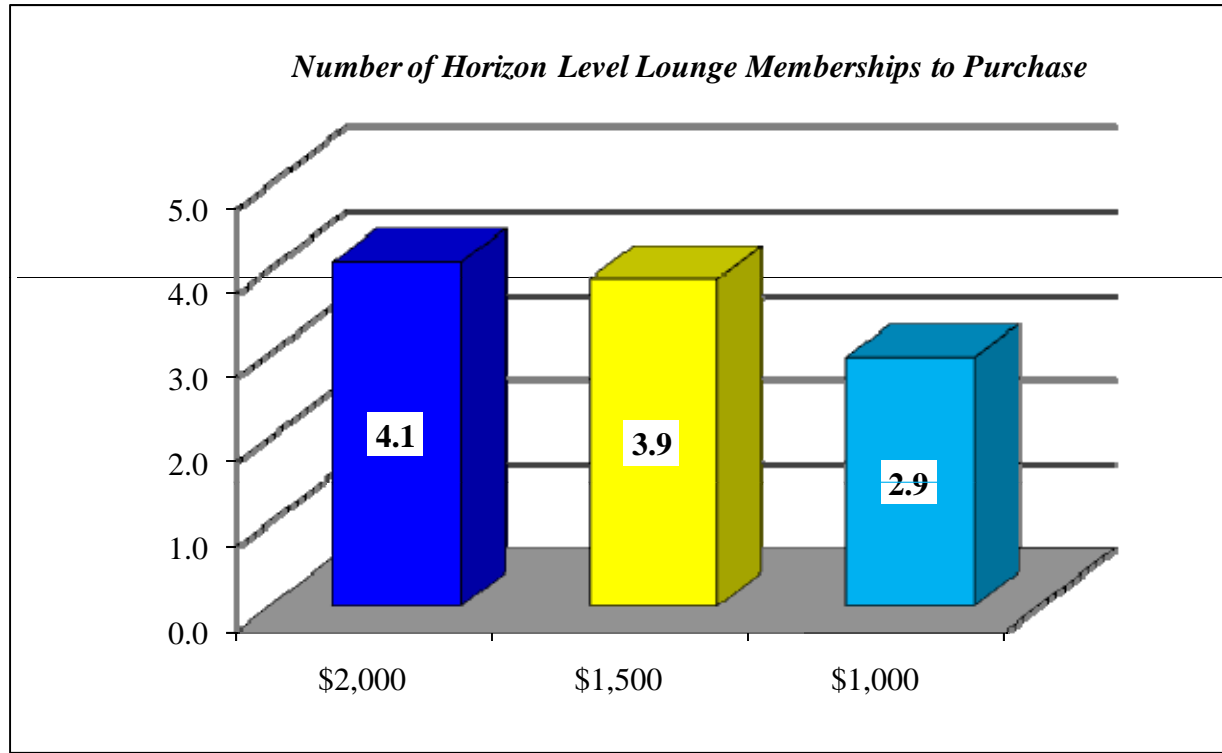
J. Horizon Level Lounge

Interest Level at Various Price Points – Total (1,206)



J. Horizon Level Lounge

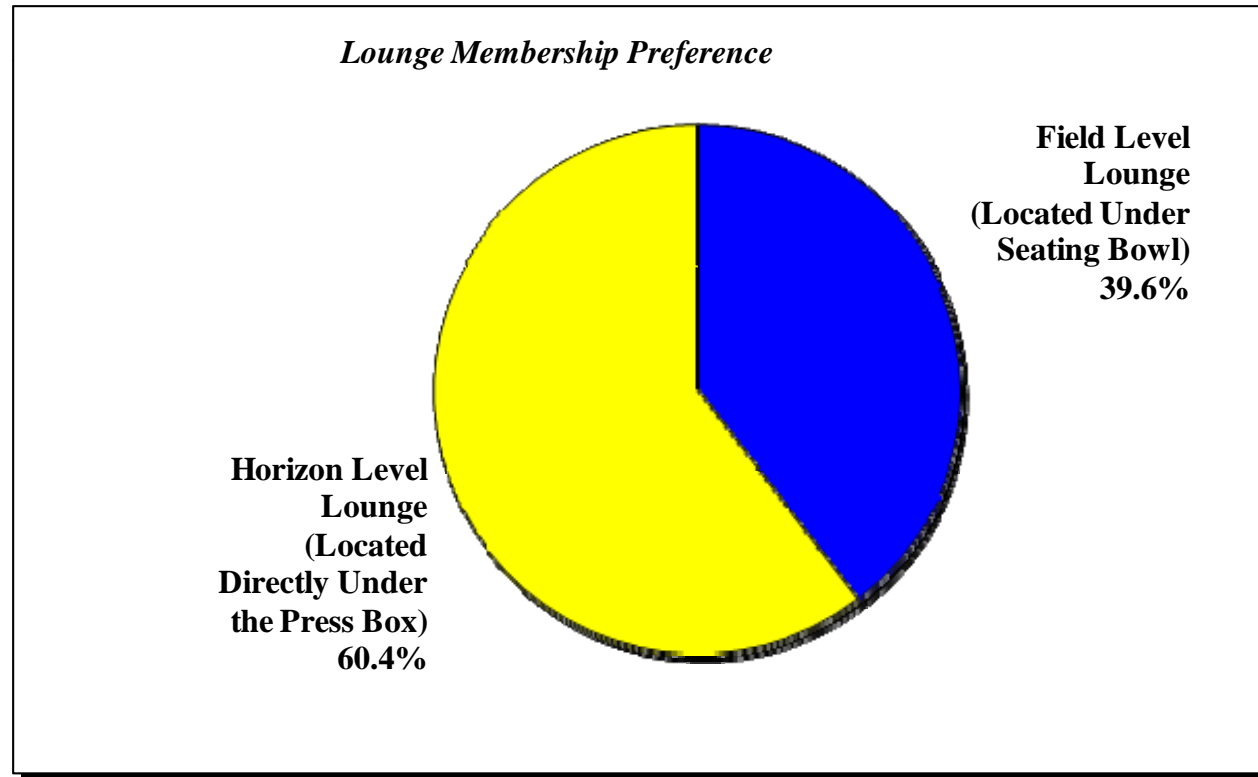
Number of Horizon Level Lounge Memberships – Total



K. Lounge Membership Preference

Lounge Membership Preference

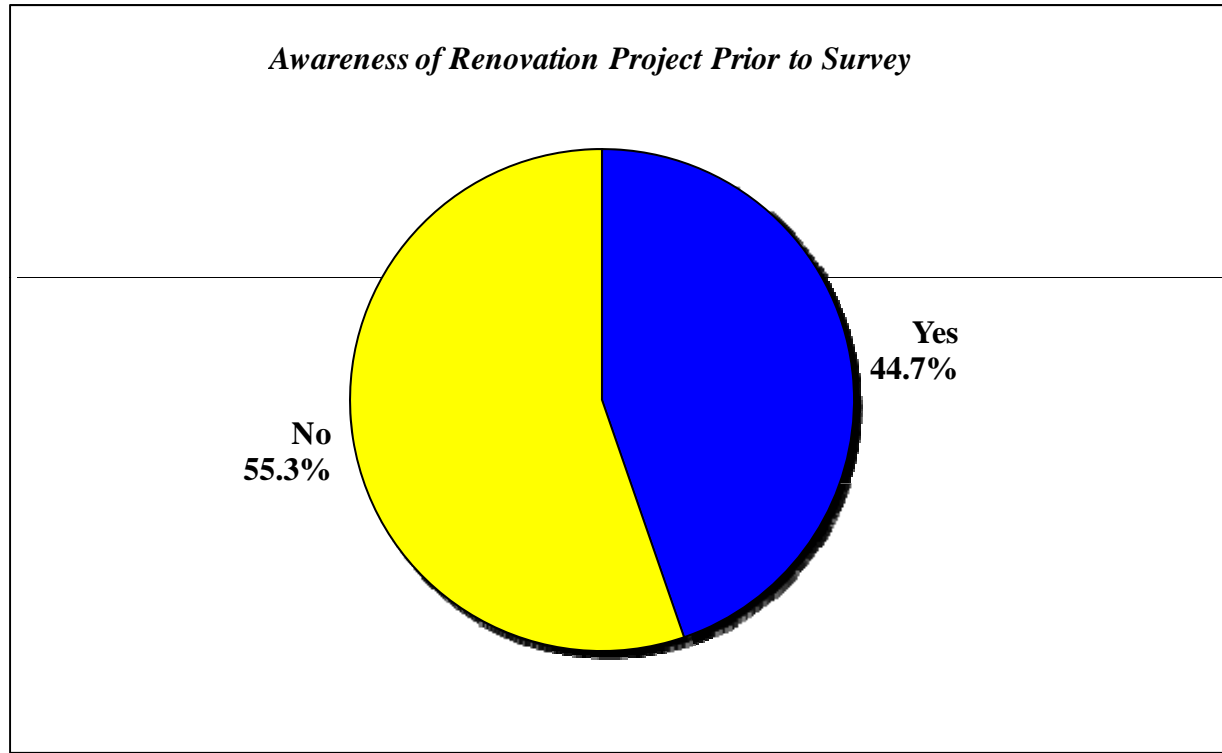
- Respondents Interested in Both Lounge Membership Concepts were Asked which Lounge Membership they Preferred, Assuming the Membership Price was Equal
- 60% of Interested Respondents Preferred the Horizon Level Lounge as Compared to the Field Level Lounge



L. Project Awareness

Project Awareness

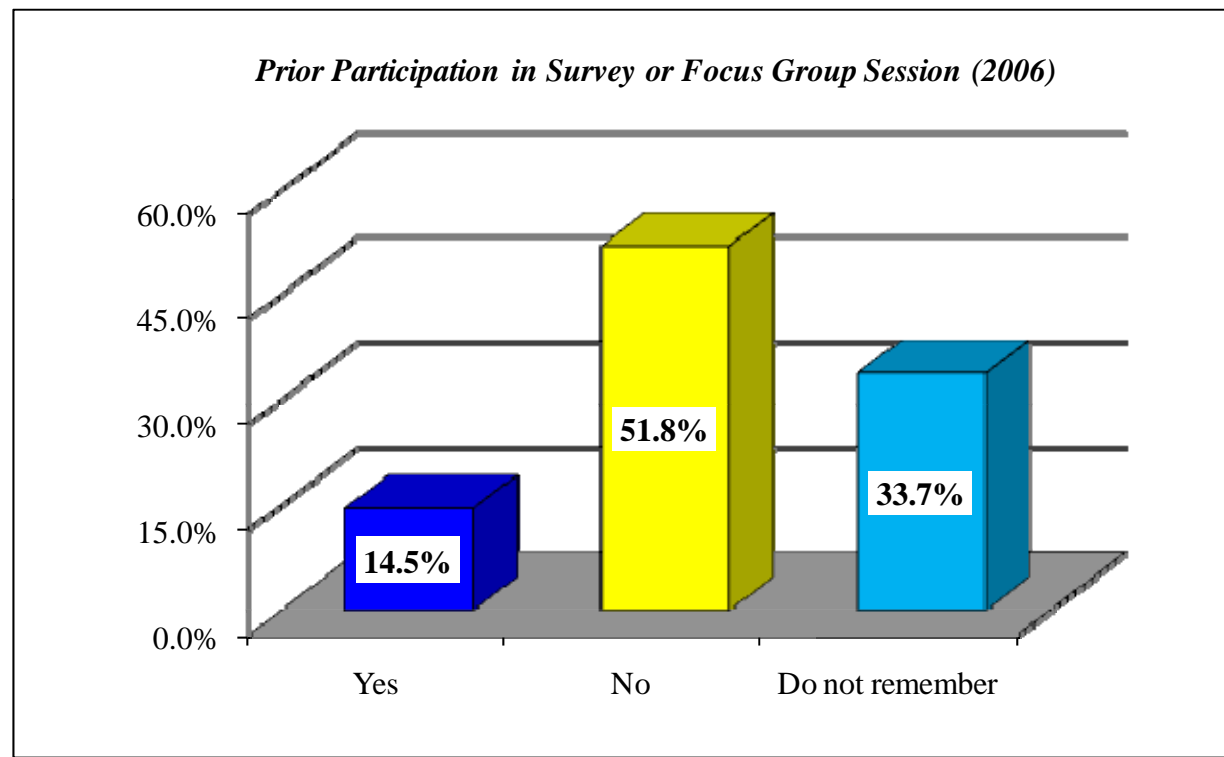
- 45% of Respondents were Aware a Renovation at the Rose Bowl was being Studied



M. Prior Participation

Prior Participation

- Respondents were Asked if they had Previously Participated in a Rose Bowl Stadium Renovation Survey or Focus Group Session



N. General Comments

General Survey Comments – Summary of Findings

- 482 Respondents Provided Additional Comments to the Survey

- Common Topics Included:
 - ✓ Current Seats are Not Comfortable/Leg Room Improvements Needed
 - ✓ Concern Regarding Pricing Some Fans Out of Current Seats or Stadium
 - ✓ Concern Regarding Seat Displacement
 - ✓ Concern about Current Economy
 - ✓ Questions Regarding Handicap Accessible Seating
 - ✓ Support “Collegiate” Atmosphere
 - ✓ Appreciation of Obtaining Fan/Community Input
 - ✓ General Support of the Rose Bowl and History
 - ✓ Acknowledge Need for Improvements/Renovation

O. Focus Groups

Focus Groups – Summary of Findings

- Two Focus Group Sessions Held with Current UCLA Donors/Football Season Ticket Holders

- General Comments
 - ✓ Recognize Need for Improvements and Desire Improvements (Concourse/Concessions/Restrooms/Scoreboard/Sound System/Etc.)
 - ✓ Acknowledged Rose Bowl Experience has Improved Over the Years

- Premium Seating
 - ✓ Limited Feedback/Support
 - ✓ Ability to Re-Lease Premium Seating is Important
 - ✓ Rose Bowl Game Ticket Inclusion is Important
 - ✓ Veranda Club Seats Perception Issue (Location)

- Lounge Areas
 - ✓ Limited Support
 - ✓ Field Views Preferred, but Not Required
 - ✓ Varying Membership Levels Preferred (Inclusive/Non-Inclusive/Cover Charge/Guest Passes/Donor Levels/Etc.)

O. Focus Groups

Focus Groups – Summary of Findings

- Impact on Donation
 - ✓ Mixed Reaction to Potential Impact on Donation Level; Generally Acknowledged Would Continue to Support UCLA
 - ✓ Acknowledged that Donors that also have Basketball Season Tickets Would Continue to Make Same Donation and Would Not be Affected

- Ticket Prices
 - ✓ Generally Acknowledged that Price of Tickets is Reasonable

- Ticket Surcharge
 - ✓ Generally Supportive/Understood Potential Need for Ticket Surcharge (5%-10%)
 - ✓ Acknowledge Surcharge Spreads Cost of Renovation to Non-Donors
 - ✓ Interested in Years/Term of Surcharge

- Personal Seat Licenses – Rose Bowl Game
 - ✓ Generally Not Interested Unless UCLA is Participating

P. Personal Seat Licenses (Web-Based Surveys)

Personal Seat Licenses – Summary of Findings

- Survey Respondents were Asked if they Would Potentially be Interested in Purchasing a Personal Seat License (PSL) for the Rose Bowl Game Only
- Survey Respondents were Advised that the PSL Would Provide Purchasers the Right to Purchase a Ticket to the Rose Bowl Game and Would Not Apply to UCLA Football Tickets, BCS National Championship Game, or Other Events
- Survey Respondents were Advised that the Cost of the Rose Bowl Game Ticket Would Not be Included in the PSL
- Survey Respondents were Advised that the Revenue Generated from PSLs Would be Used to Pay for a Portion of the Renovation Costs and Only be Offered on a Limited Basis
- Interest in PSLs (Initial Screening)
 - ✓ Approximately 26% (773) of Respondents Indicated Some Interest (After Initial Screening)
- Approximately 49% (375) of Interested Respondents Attend the Rose Bowl Game Every/Nearly Every Year or From Time to Time

P. Personal Seat Licenses (Web-Based Surveys)

Personal Seat Licenses – Summary of Findings

- Respondents Indicated that the Primary Reason for Not Attending the Rose Bowl Game More Often was Ticket Availability

- Interest in PSLs (Before Pricing)
 - ✓ Approximately 81% (625) of Screened Respondents Indicated Some Interest

- Respondents were Advised Seats Located Closer to the 50 Yard Line Would Require a Higher PSL Price
 - ✓ Respondents Preferred Seats Between the 40 and 50 Yard Line

- Respondents Generally Expected to have Rights to Seats for 10 or 20 Years – Some Respondents Indicated a Preference for Lifetime Rights

P. Personal Seat Licenses (Web-Based Surveys)

Personal Seat Licenses – Summary of Findings

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$10,000 – 27% (168)
 - ✓ \$7,500 – 31% (196)
 - ✓ \$5,000 – 56% (351)
 - ✓ \$2,500 – 76% (475)

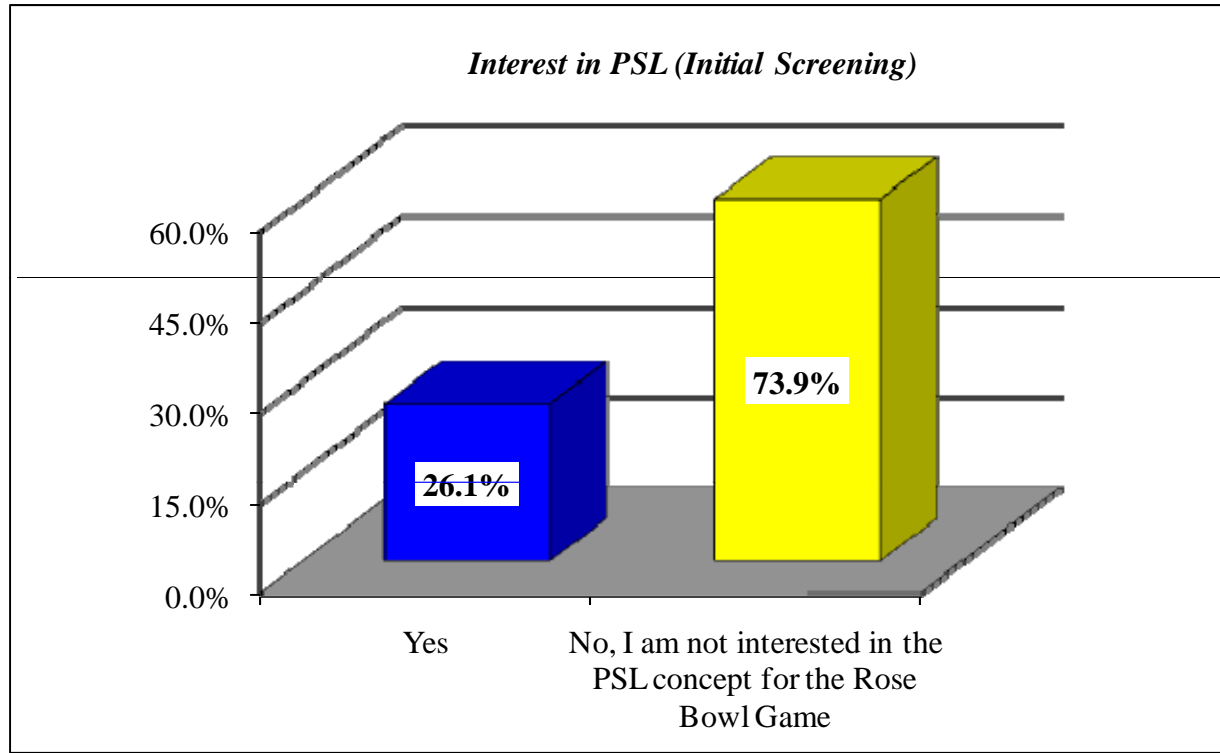
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$2,500 Level as Indicated by Definitely Yes/Probably Yes Respondents (5% to 40%)

- Number of Seats Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 4.2 (\$10,000) to 3.0 (\$2,500) PSLs

Please See Support Tables for Findings by Category

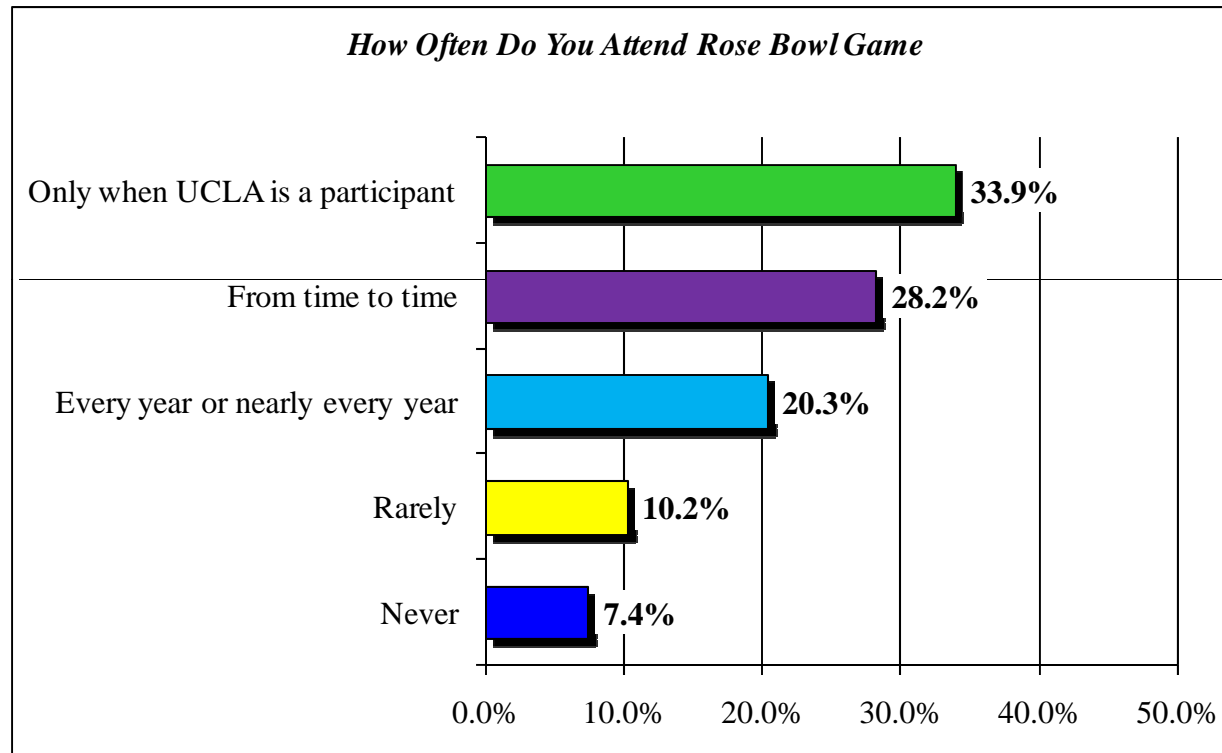
P. Personal Seat Licenses (Web-Based Surveys)

Rose Bowl Game PSLs (Initial Screening) – Total (2,966)



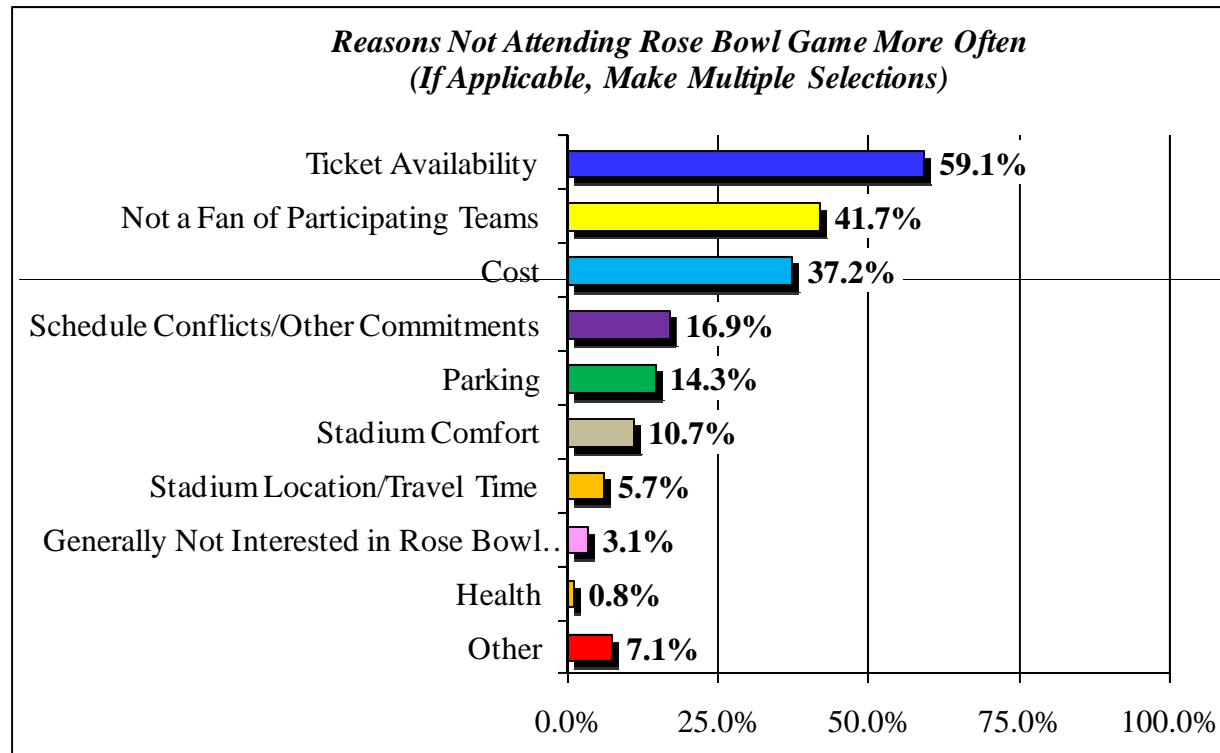
P. Personal Seat Licenses (Web-Based Surveys)

Rose Bowl Game Attendance – Total (773)



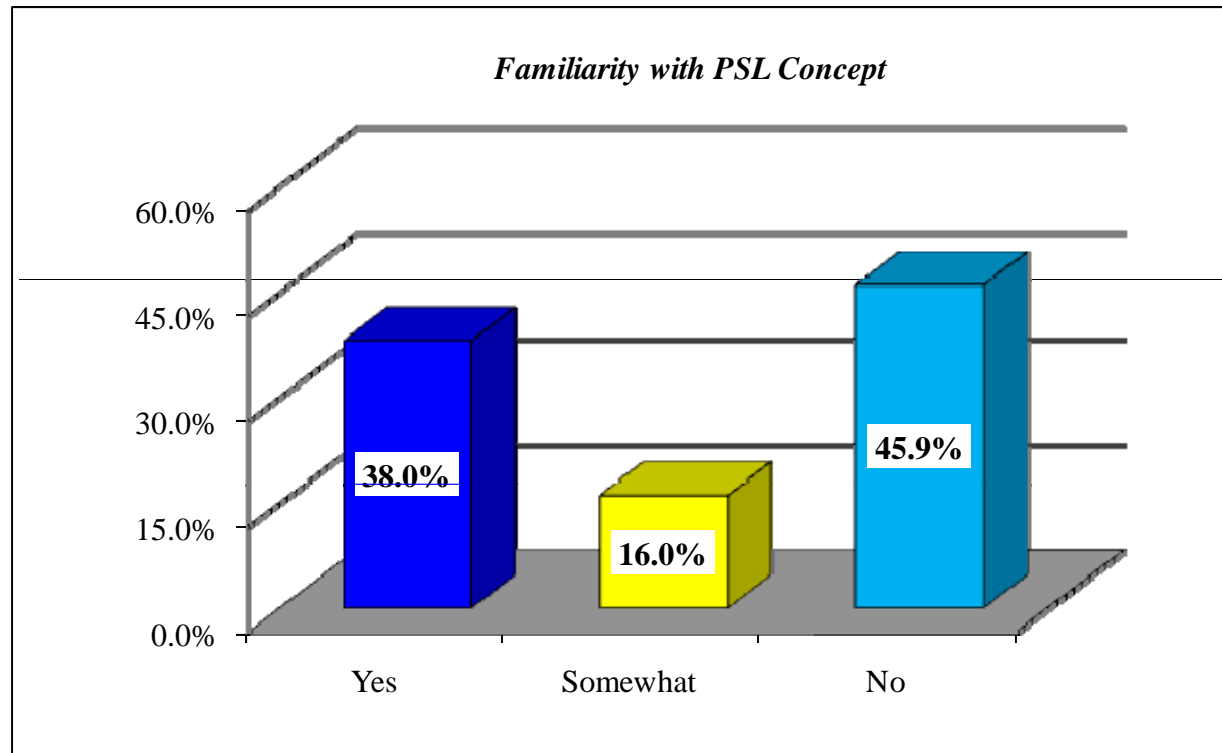
P. Personal Seat Licenses (Web-Based Surveys)

Reasons Not Attending Rose Bowl Game More Often – Total



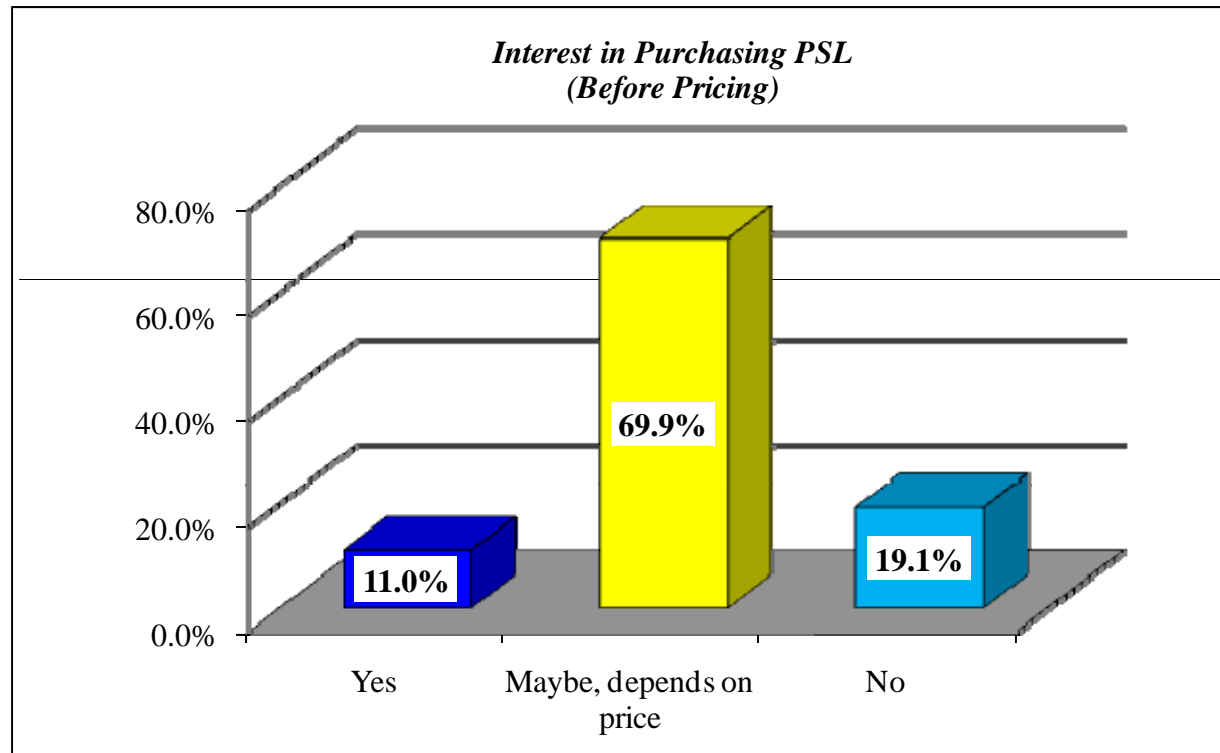
P. Personal Seat Licenses (Web-Based Surveys)

Familiarity with PSL Concept – Total (773)



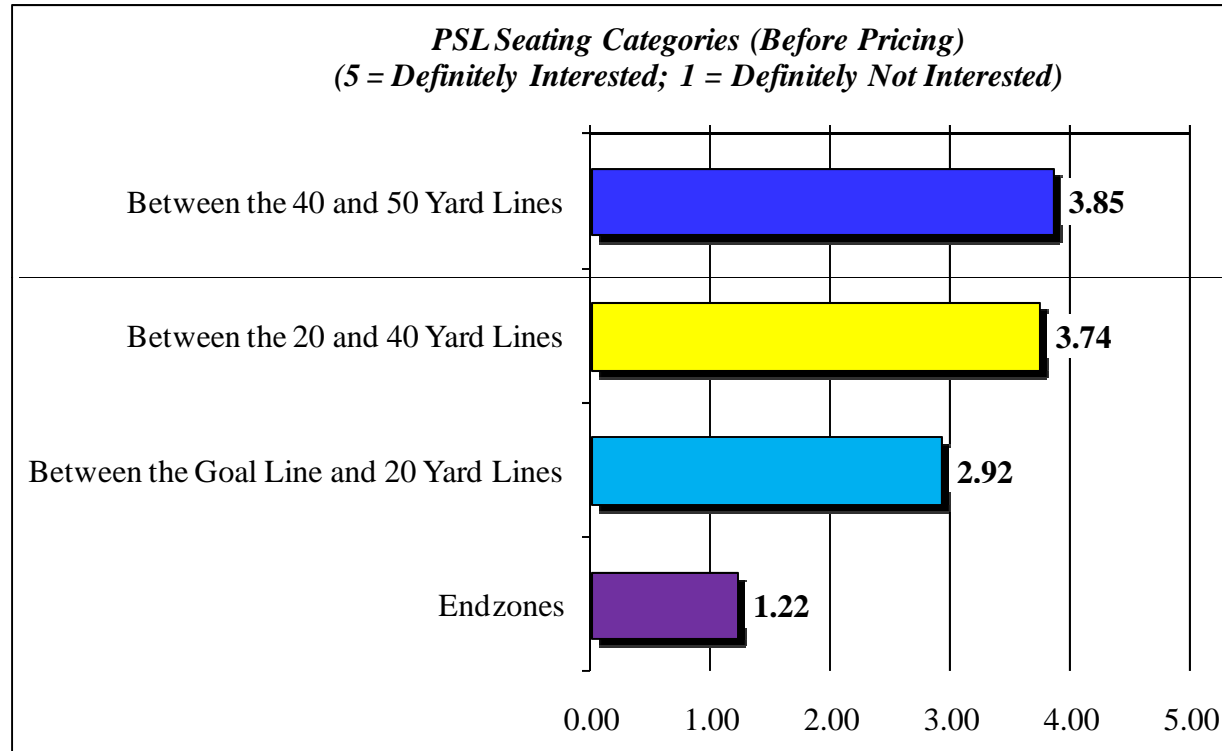
P. Personal Seat Licenses (Web-Based Surveys)

Rose Bowl Game PSLs (Before Pricing) – Total (773)



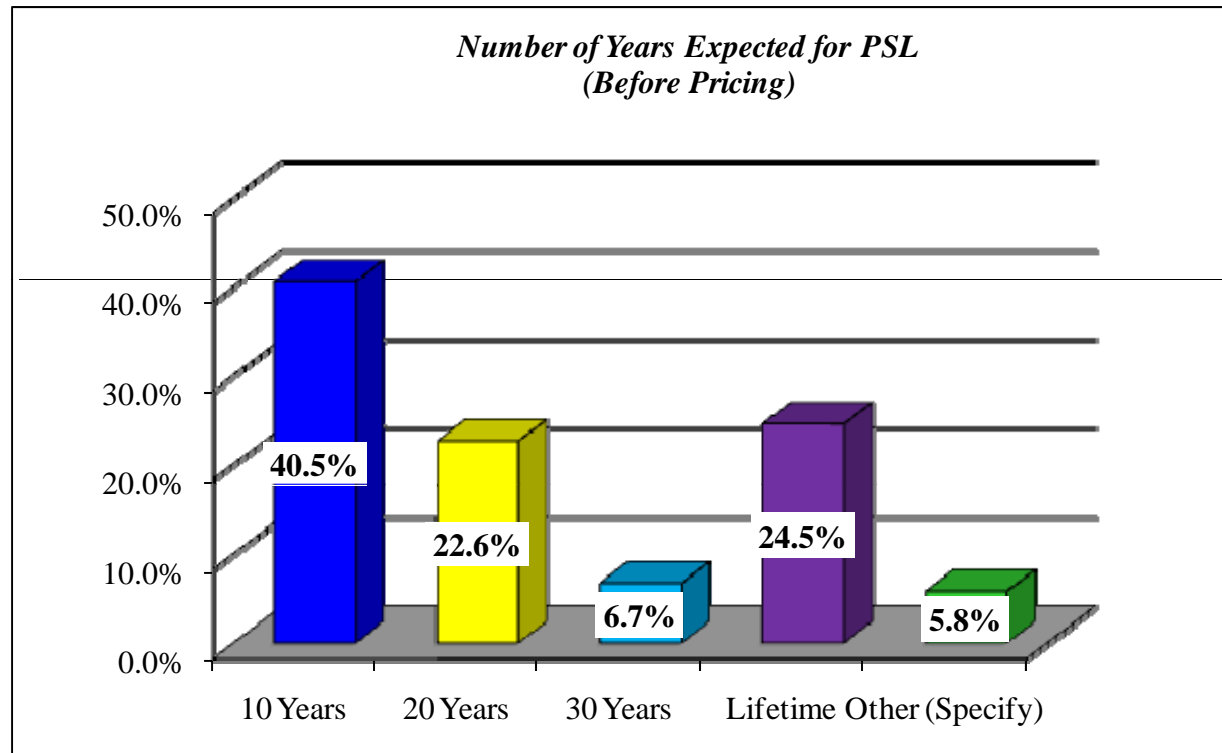
P. Personal Seat Licenses (Web-Based Surveys)

Preferred Seat Location – Total (624)



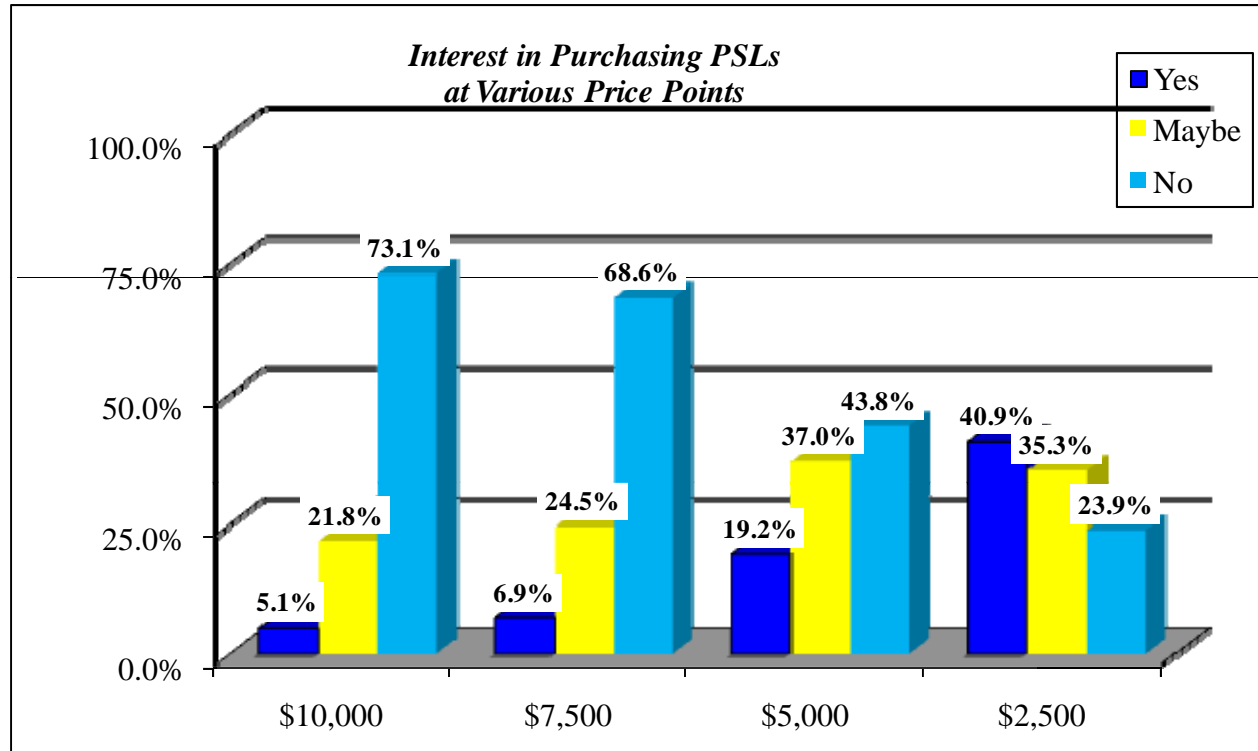
P. Personal Seat Licenses (Web-Based Surveys)

Expected PSL Term Length – Total (624)



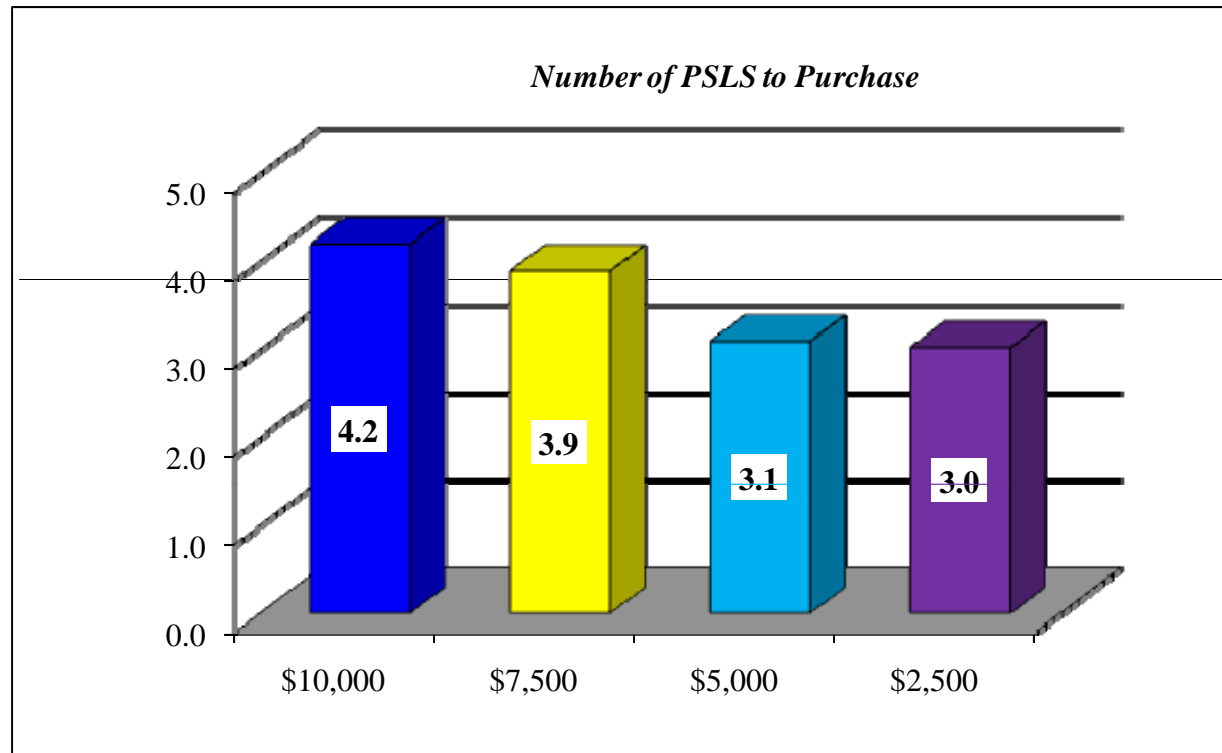
P. Personal Seat Licenses (Web-Based Surveys)

Interest Level at Various Price Points – Total (624)



P. Personal Seat Licenses (Web-Based Surveys)

Number of PSLs – Total



Q. Personal Seat Licenses (Fan Intercept Surveys)

Fan Intercept Surveys – Summary of Findings

- Fan Intercept Surveys were Completed at the 2010 Rose Bowl Game
- Survey Respondents were Asked if they Would Potentially be Interested in Purchasing a Personal Seat License (PSL) for the Rose Bowl Game Only
- Survey Respondents were Advised that the PSL Would Provide Purchasers the Right to Purchase a Ticket to the Rose Bowl Game and Would Not Apply to UCLA Football Tickets, BCS National Championship Game, or Other Events
- Survey Respondents were Advised that the Cost of the Rose Bowl Game Ticket Would Not be Included in the PSL
- Survey Respondents were Advised that the Revenue Generated from PSLs Would be Used to Pay for a Portion of the Renovation Costs and Only be Offered on a Limited Basis

Q. Personal Seat Licenses (Fan Intercept Surveys)

Fan Intercept Surveys – Summary of Findings

- Approximately 19% (102) of Respondents were Attending the Rose Bowl Game as a Fan of the Rose Bowl Game, Not Specifically as a Fan of Participating Teams

- Approximately 18% (96) of Respondents Attend the Rose Bowl Game Regardless of Which Teams are Participating
 - ✓ Note: Respondents Who Indicated they Attend Only as a Fan of The Ohio State Buckeyes or Oregon Ducks were Screened-Out from Survey

- Approximately 29% (94) of Respondents had Some Familiarity with the PSL Concept

- Interest in PSLs (Before Pricing)
 - ✓ Approximately 30% (95) of Respondents Indicated Some Interest

- Respondents were Advised Seats Located Closer to the 50 Yard Line Would Require a Higher PSL Price
 - ✓ Respondents Preferred Seats Between the 40 and 50 Yard Line

Q. Personal Seat Licenses (Fan Intercept Surveys)

Fan Intercept Surveys – Summary of Findings

- Respondents Generally Expected to have Rights to Seats for 10 to 20 Years – Some Respondents Indicated a Preference for Lifetime Rights

- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ \$10,000 – 41% (40)
 - ✓ \$7,500 – 41% (40)
 - ✓ \$5,000 – 66% (65)
 - ✓ \$2,500 – 72% (68)

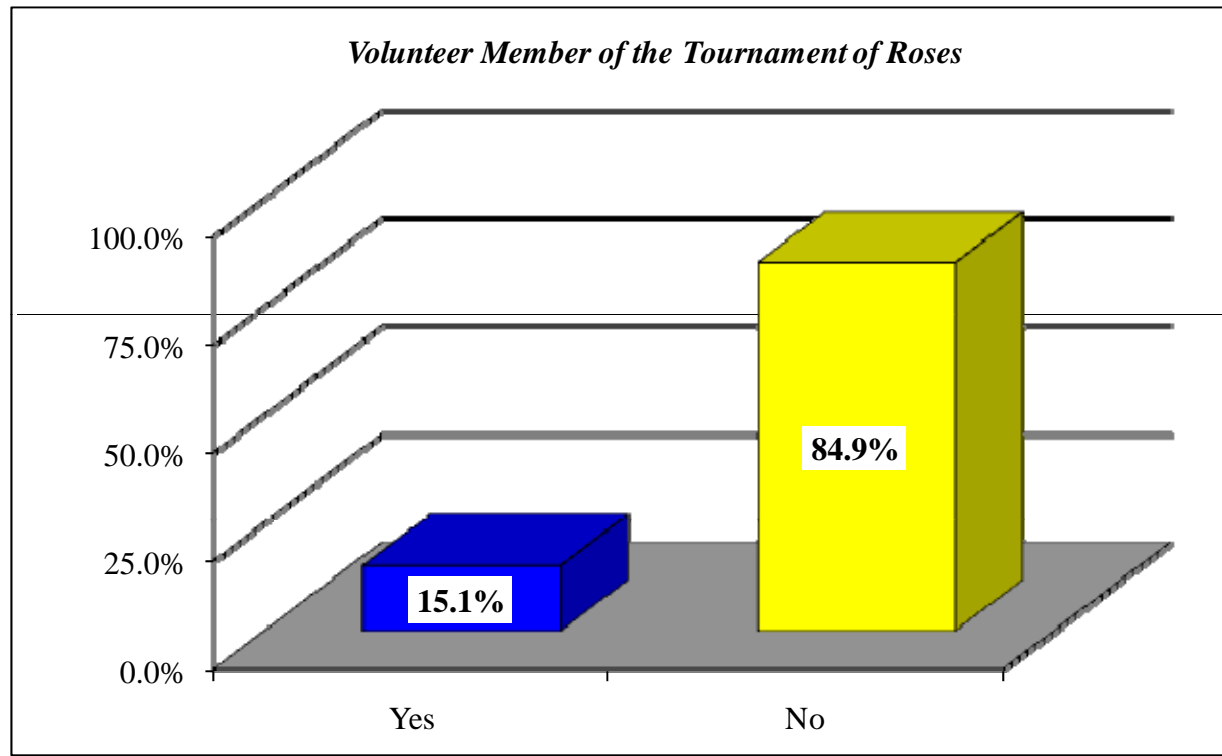
- Interest at Various Price Points (Interest = Definitely Yes/Probably Yes/Maybe)
 - ✓ Significant Increase in Demand at \$2,500 Level as Indicated by Definitely Yes/Probably Yes Respondents (13% to 51%)

- Number of Seats Likely Purchased
 - ✓ Respondents Indicated a Likely Purchase of 2.7 (\$10,000) to 2.3 (\$2,500) PSLs

Please See Support Tables for Findings by Category

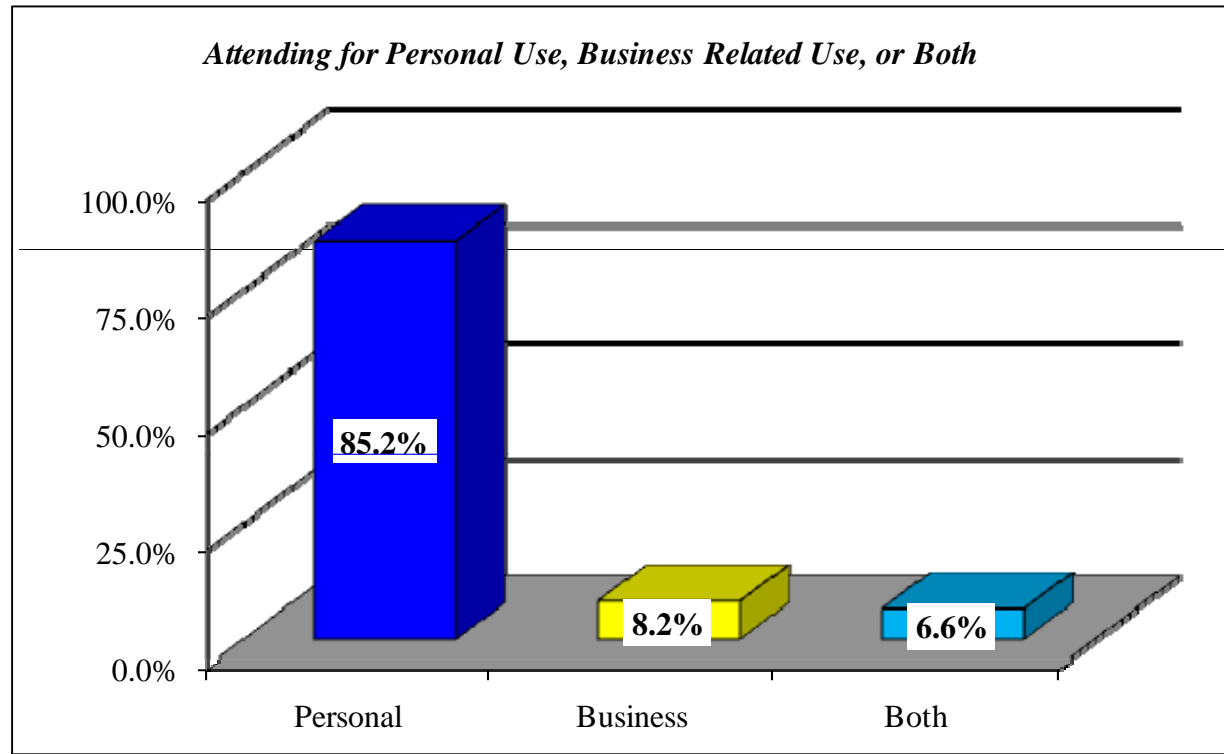
Q. Personal Seat Licenses (Fan Intercept Surveys)

Tournament of Roses Members (551)



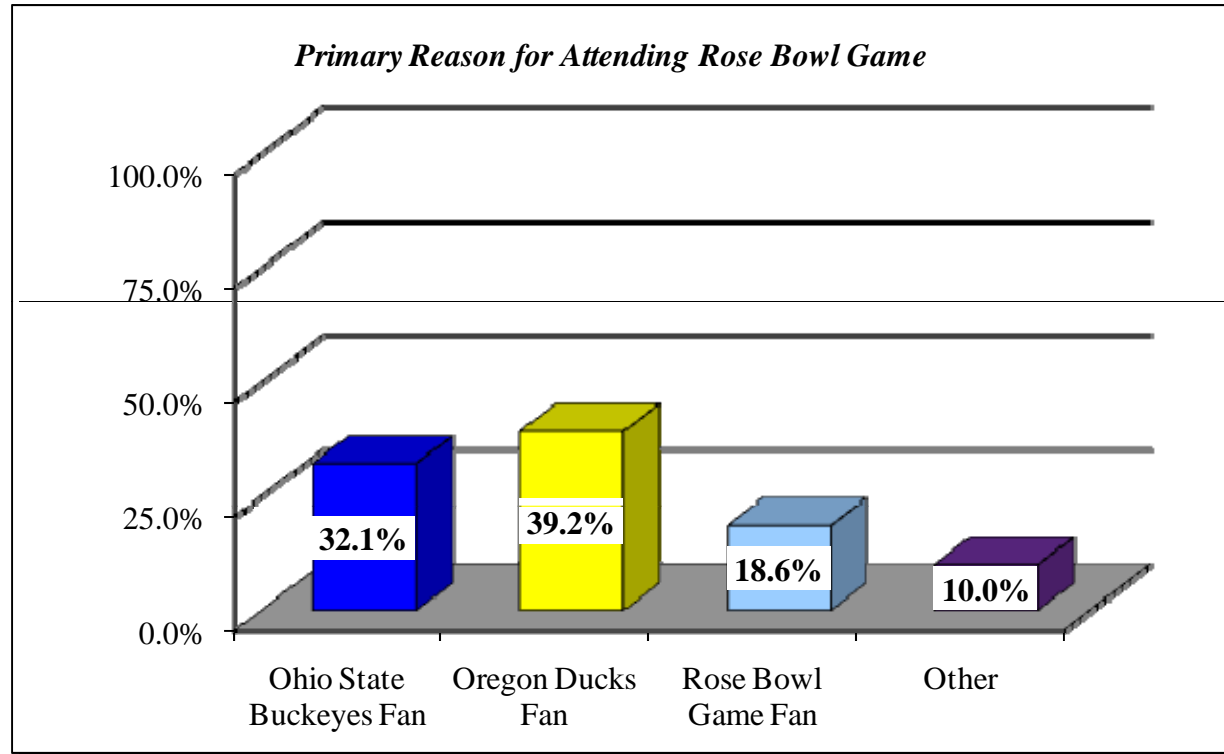
Q. Personal Seat Licenses (Fan Intercept Surveys)

Rose Bowl Game Attendance (551)



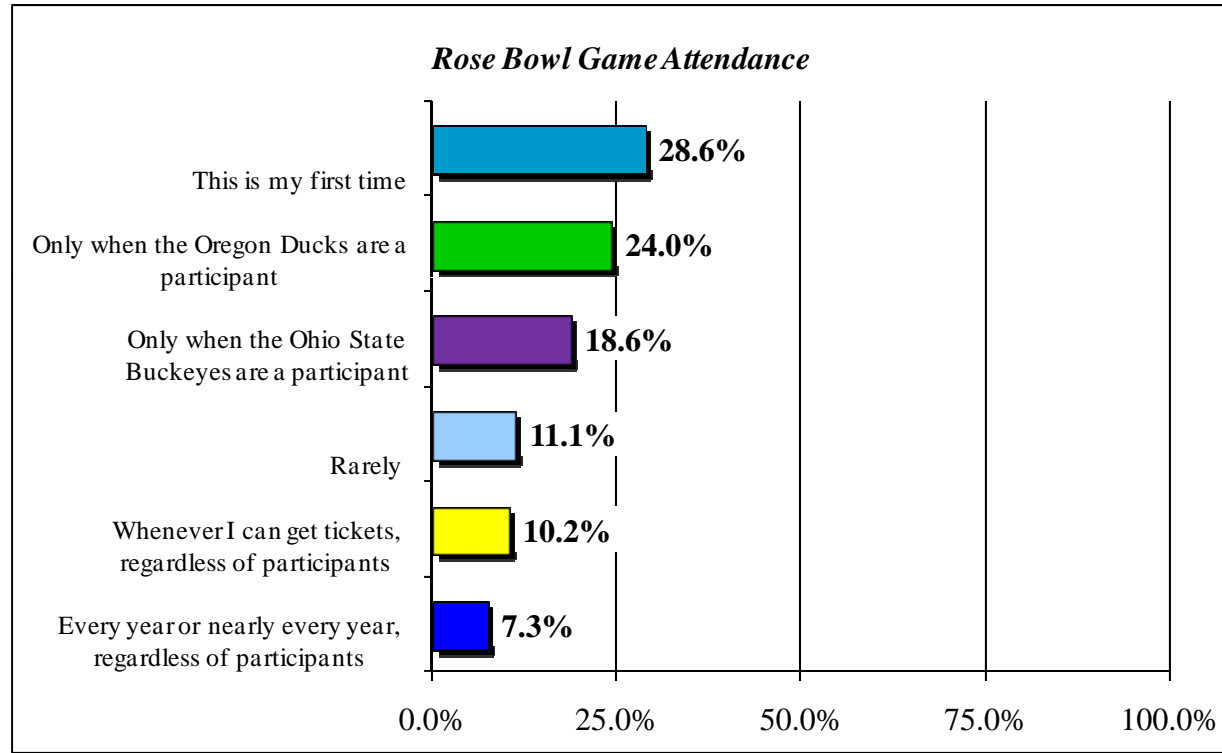
Q. Personal Seat Licenses (Fan Intercept Surveys)

Rose Bowl Game Attendance (551)



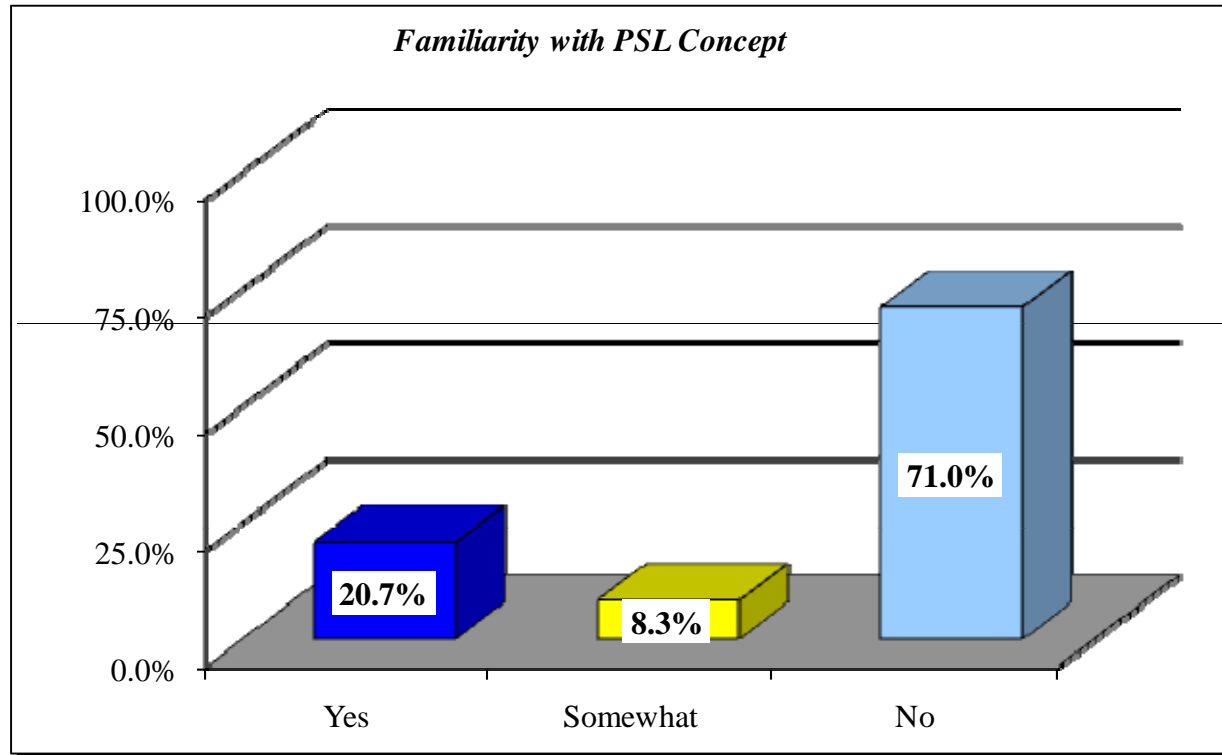
Q. Personal Seat Licenses (Fan Intercept Surveys)

Rose Bowl Game Attendance (551)



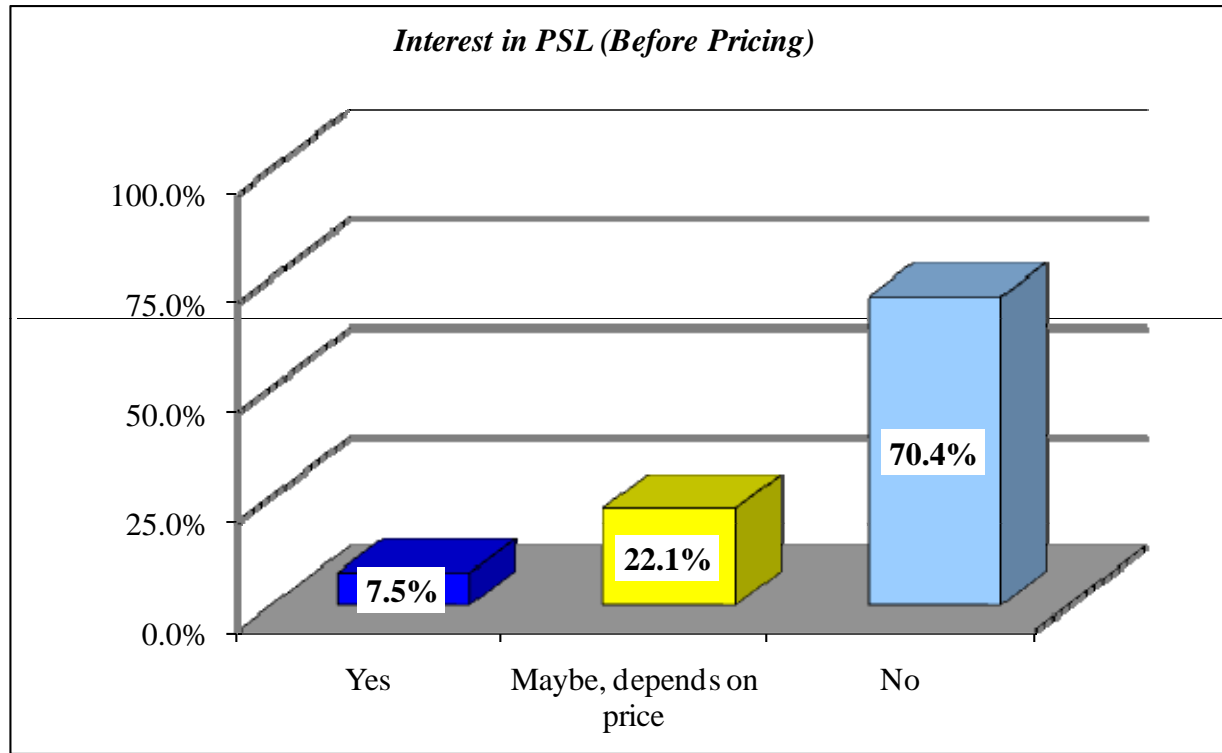
Q. Personal Seat Licenses (Fan Intercept Surveys)

Familiarity with PSL Concept (324)



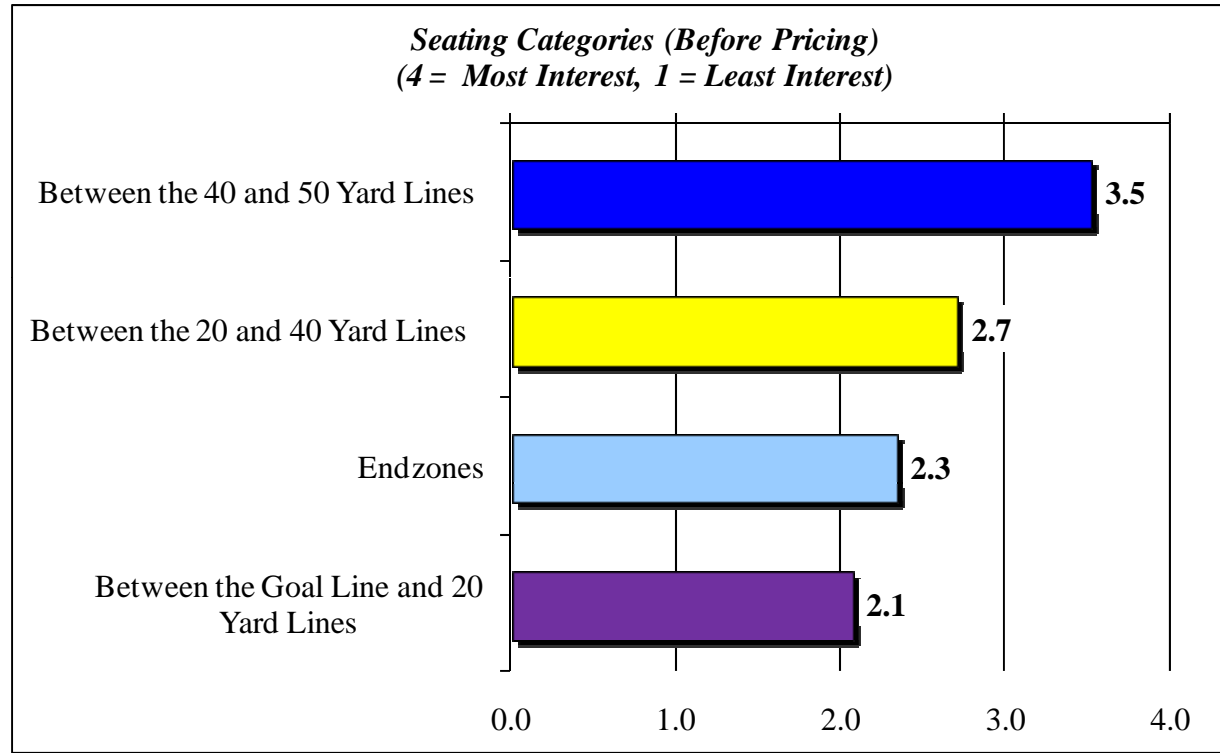
Q. Personal Seat Licenses (Fan Intercept Surveys)

Rose Bowl Game PSLs (Before Pricing) (321)



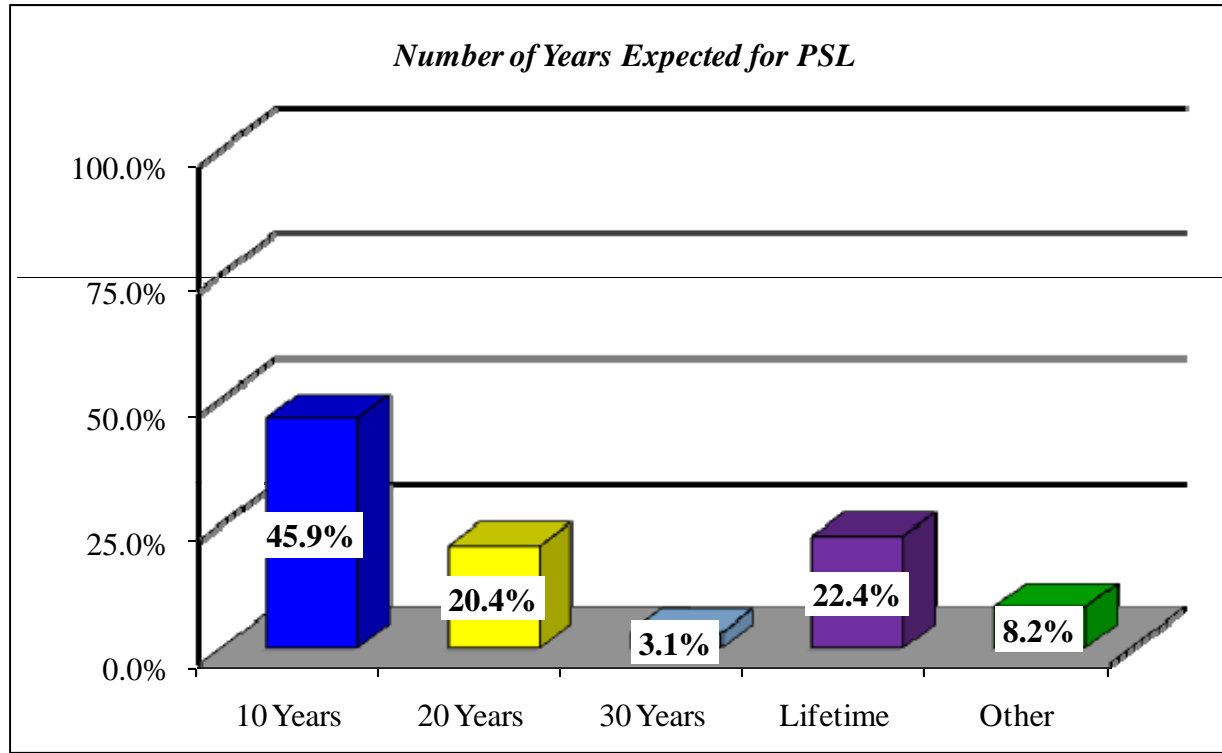
Q. Personal Seat Licenses (Fan Intercept Surveys)

Preferred Seat Location



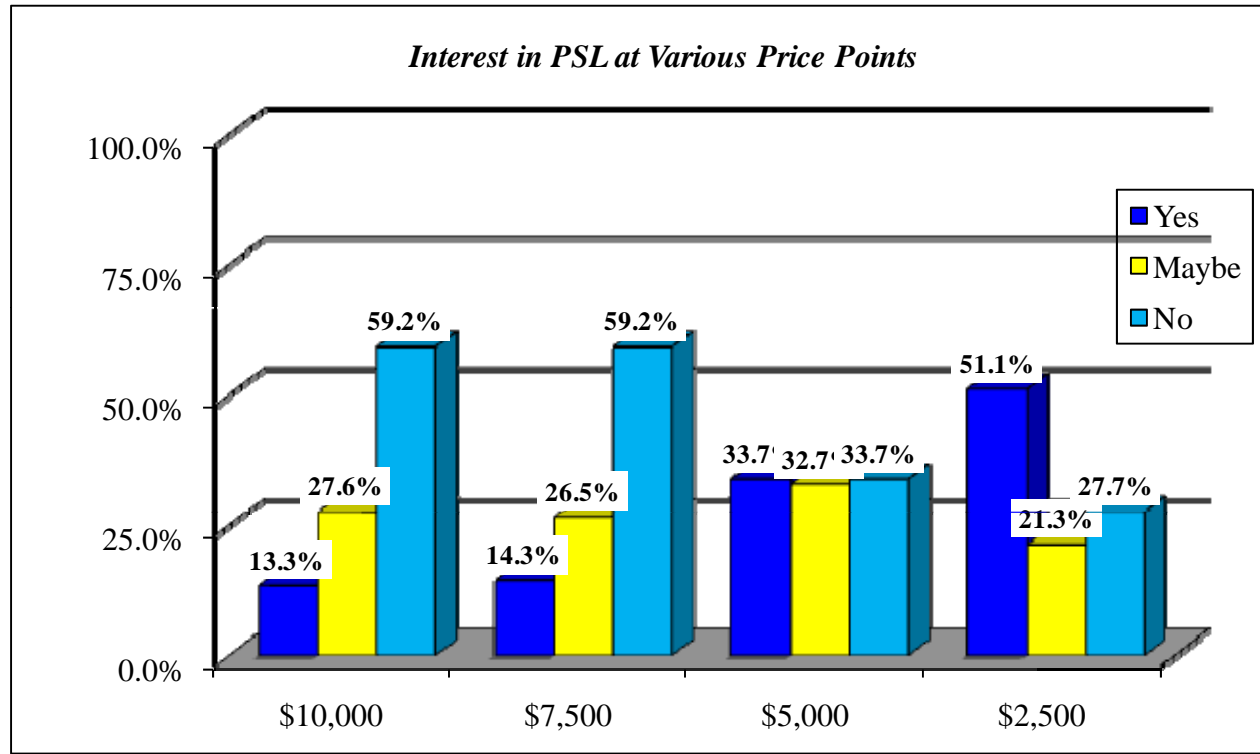
Q. Personal Seat Licenses (Fan Intercept Surveys)

Expected PSL Term Length (98)



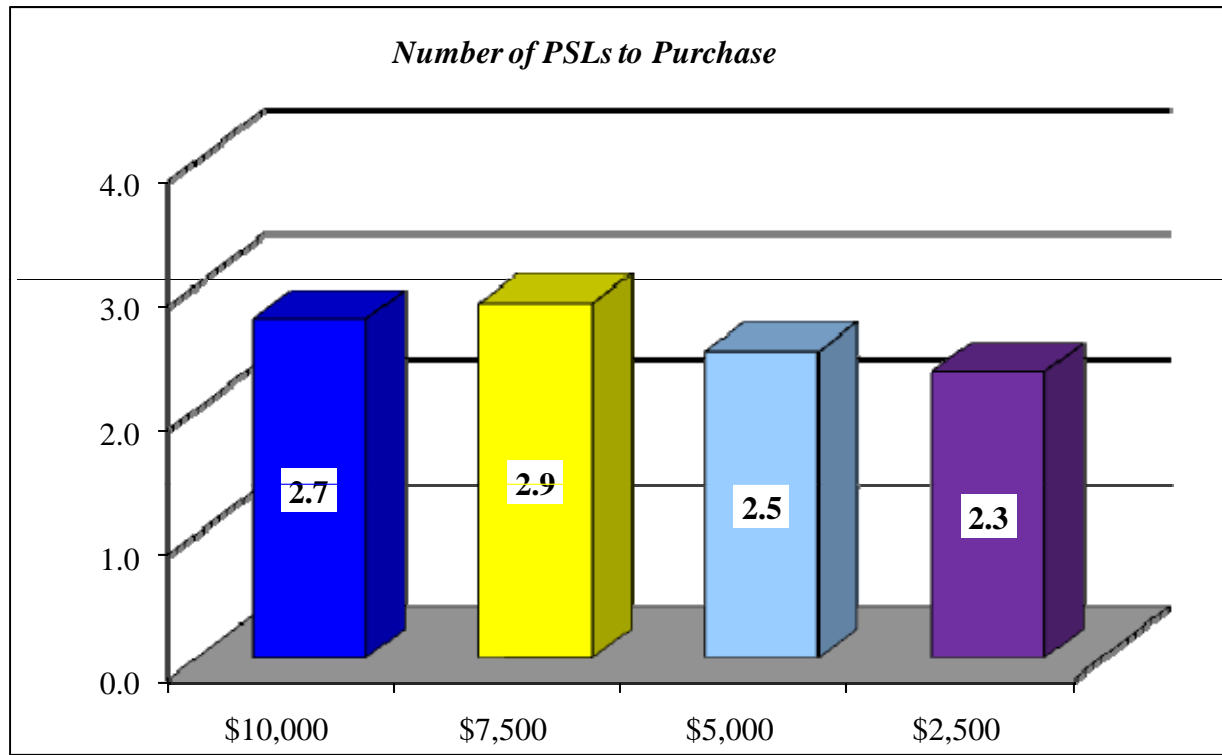
Q. Personal Seat Licenses (Fan Intercept Surveys)

Interest Level at Various Price Points (98)



Q. Personal Seat Licenses (Fan Intercept Surveys)

Number of PSLs



Q. Personal Seat Licenses (Fan Intercept Surveys)

Project Awareness

