



Behind The Shield

Scott LaBounty – Club Business Development



Leadership Summit

THE **POWER** OF

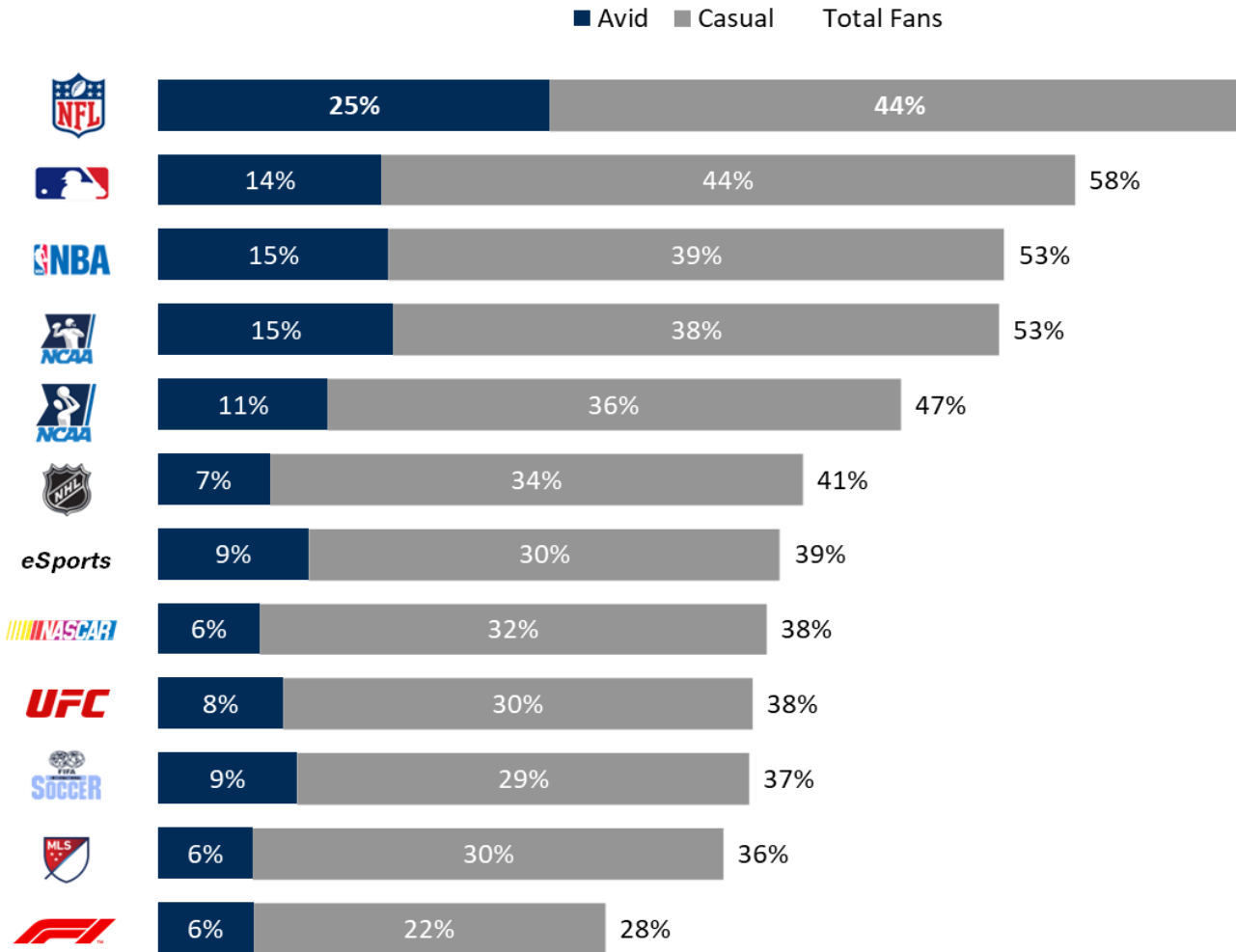
- **Impact of the NFL**
- **The Power of the Raiders**
- **Super Bowl LVIII**
- **Community Impact**
- **Q&A**



93 OF THE TOP 100 BROADCASTS LAST YEAR



% of US population 8+ who are fans



**LARGEST &
MOST AVID
FAN BASE
IN SPORTS**

Source: SSRS Sports Poll/KidSay Kids Poll Base: US Pop 8+. Total Sports Fan = A Little Bit, Somewhat, or Very Interested in the Sport. Avid Sports Fan = Very Interested in the Sport.



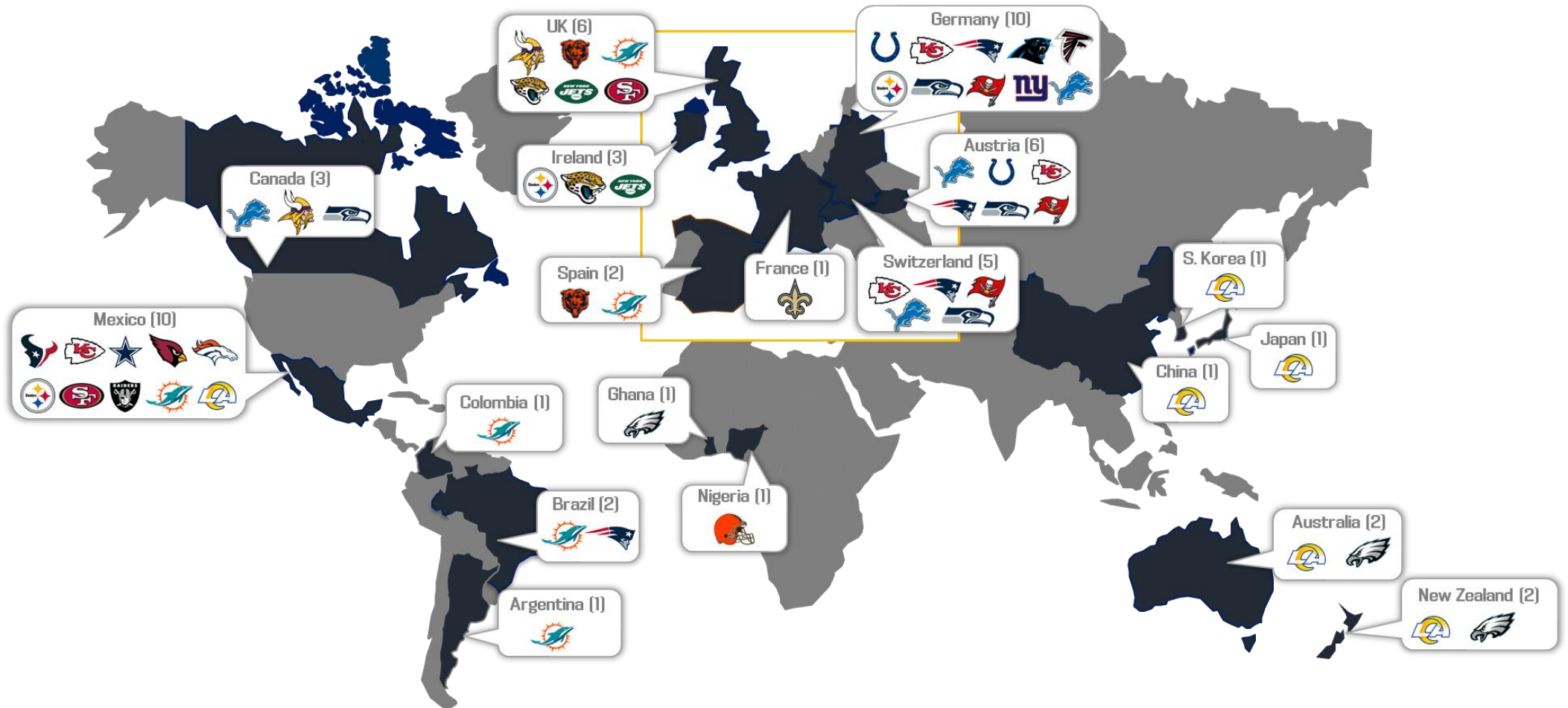


Children (ages 8-11)	70%	61%	56%	65%	56%	48%
Gen Z (ages 12-24)	66%	54%	53%	61%	53%	43%
Parents of children under 18	72%	58%	56%	59%	50%	42%
Women/Girls	62%	52%	45%	48%	40%	34%
People of Color (Latino/Hispanic, Black Non-L/H, Other/Mixed Non-L/H ethnicity)	68%	56%	50%	66%	50%	36%
LGBTQ+	55%	47%	39%	46%	42%	36%

THE NFL
IS THE
#1 SPORT
ACROSS
KEY
DEMOS



CONTINUING TO GROW THE GAME **ACROSS THE GLOBE**



THE POWER OF THE



The NFL Provides Brands with the Strongest Platform to Increase Brand Favorability, Relevance, and Purchase Consideration in the Las Vegas DMA

If a brand became a sponsor of the following sports leagues, which league would have the most positive impact on you with respect to.... (Based on Sports Fans in the Las Vegas DMA)



NFL/Raiders Fans in Las Vegas are Receptive to Sponsorship

Sponsorship Impact Among NFL Fans in Las Vegas DMA

49%

Feel better about companies that sponsor the NFL

+7% Pts vs. Total NFL Fans

NFL DMA Rank: 8th

41%

More likely to buy products or services from companies that sponsor the NFL

+1% Pt vs. Total NFL Fans

NFL DMA Rank: 11th

48%

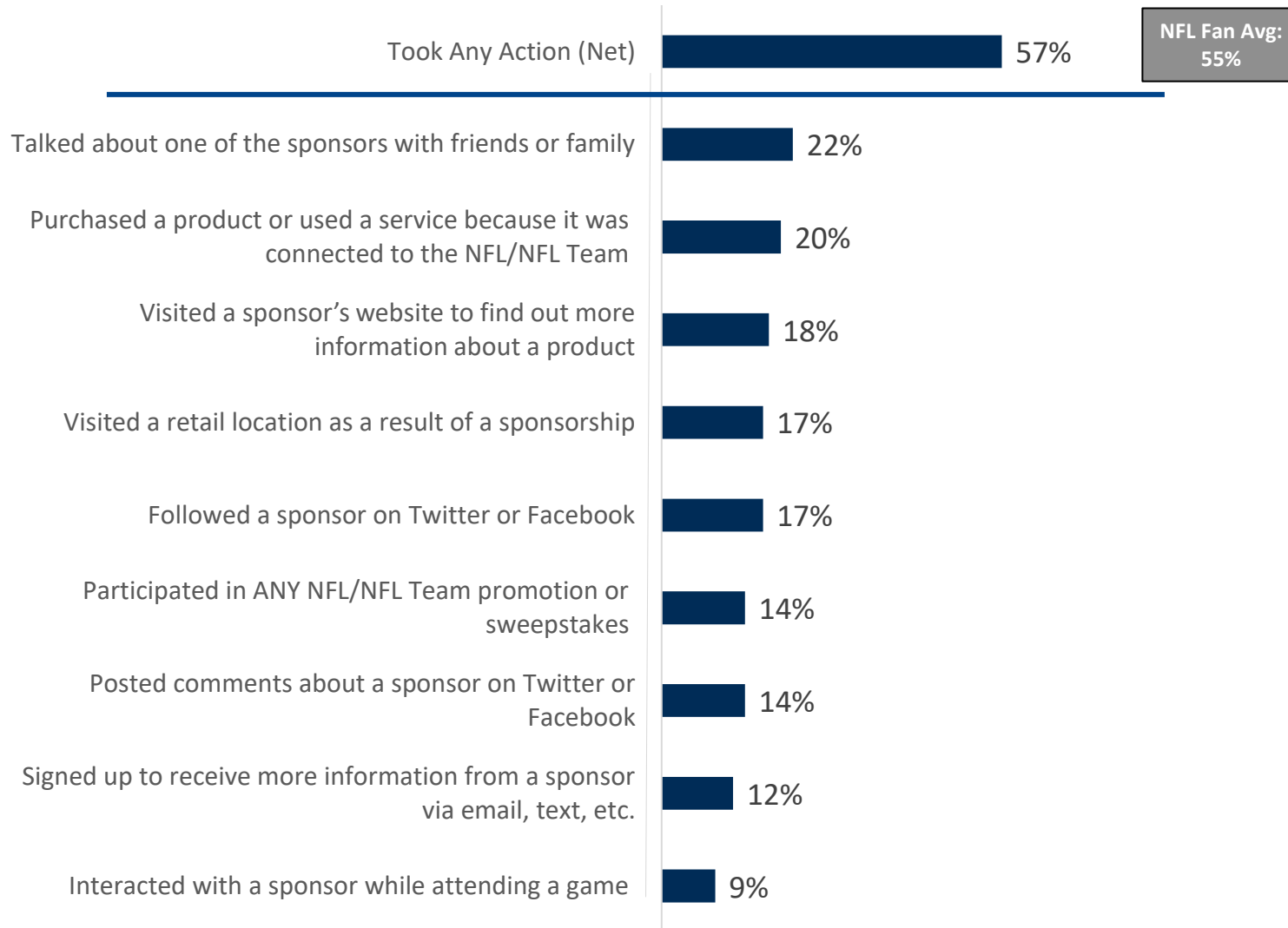
Notice and appreciate what sponsors of the NFL provide to the fan experience

-2% Pts vs. Total NFL Fans

NFL DMA Rank: 12th



Actions Taken as a Result of an NFL Sponsorship

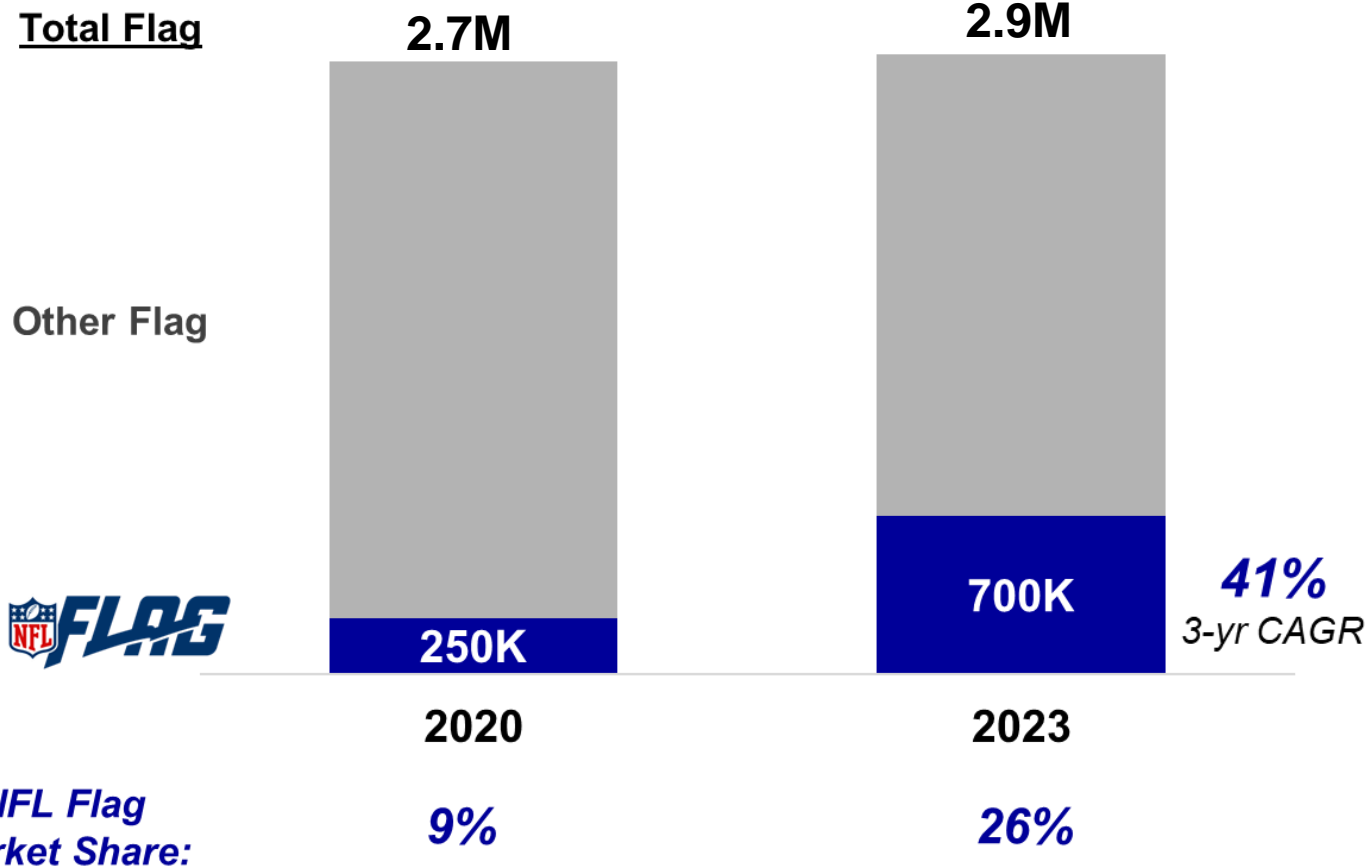


**More Than Half
Of Raiders Fans
Engaged With a
Sponsor Last
Season**



BUILDING THE FANBASE OF THE FUTURE

US Youth Participation in Flag Football (age 6-17)



Broader Participation Impact

- Seeing a stabilization in tackle participation - in part benefiting from accessibility of flag
- 2023 saw first increase in high school tackle participation since 2013
- Continue to build foundation for transition from flag to tackle



PURSUING GLOBAL GROWTH

2023 in Review

6

International
Offices



5

International
Games



x3



x2



Flag approved as
Olympic Sport

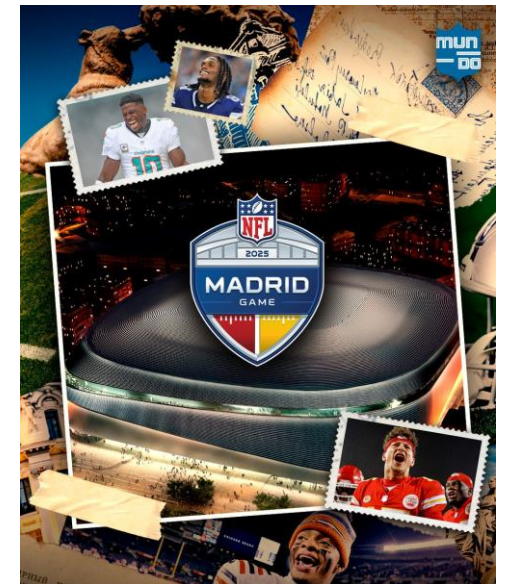
\$450M

International
Revenue

Up to 8
Games

International Game
Inventory (JC-7)

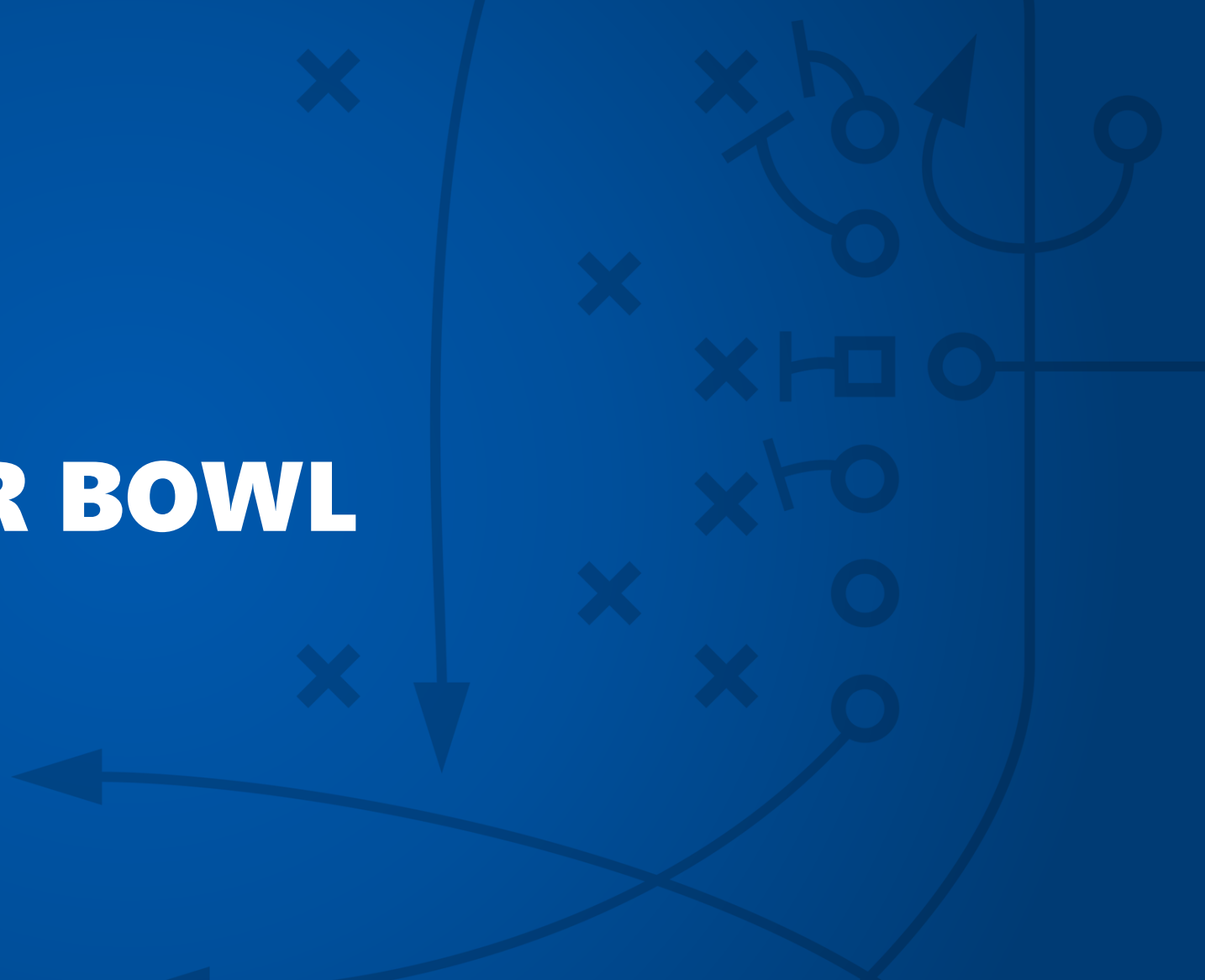
2024 & Beyond



- Strategy Refresh latest findings
- Evolving media approach
- Two new IG locations confirmed, diligence on new potential future markets
- Momentum on Football, updated structure
- Continued growth in Global Markets Program



LAS VEGAS SUPER BOWL



SUPER BOWL RESULTS

Game



210M in total viewers⁽¹⁾

143M average minute audience, up from 136M last year based on research study with Nielsen

Fans



Over 1.3B social media video views, highest ever

Multiple all-time highs set across platforms, including incredible growth on TikTok

Engagement



Super Bowl vs. F1: 'Like night and day' for some small businesses near Strip

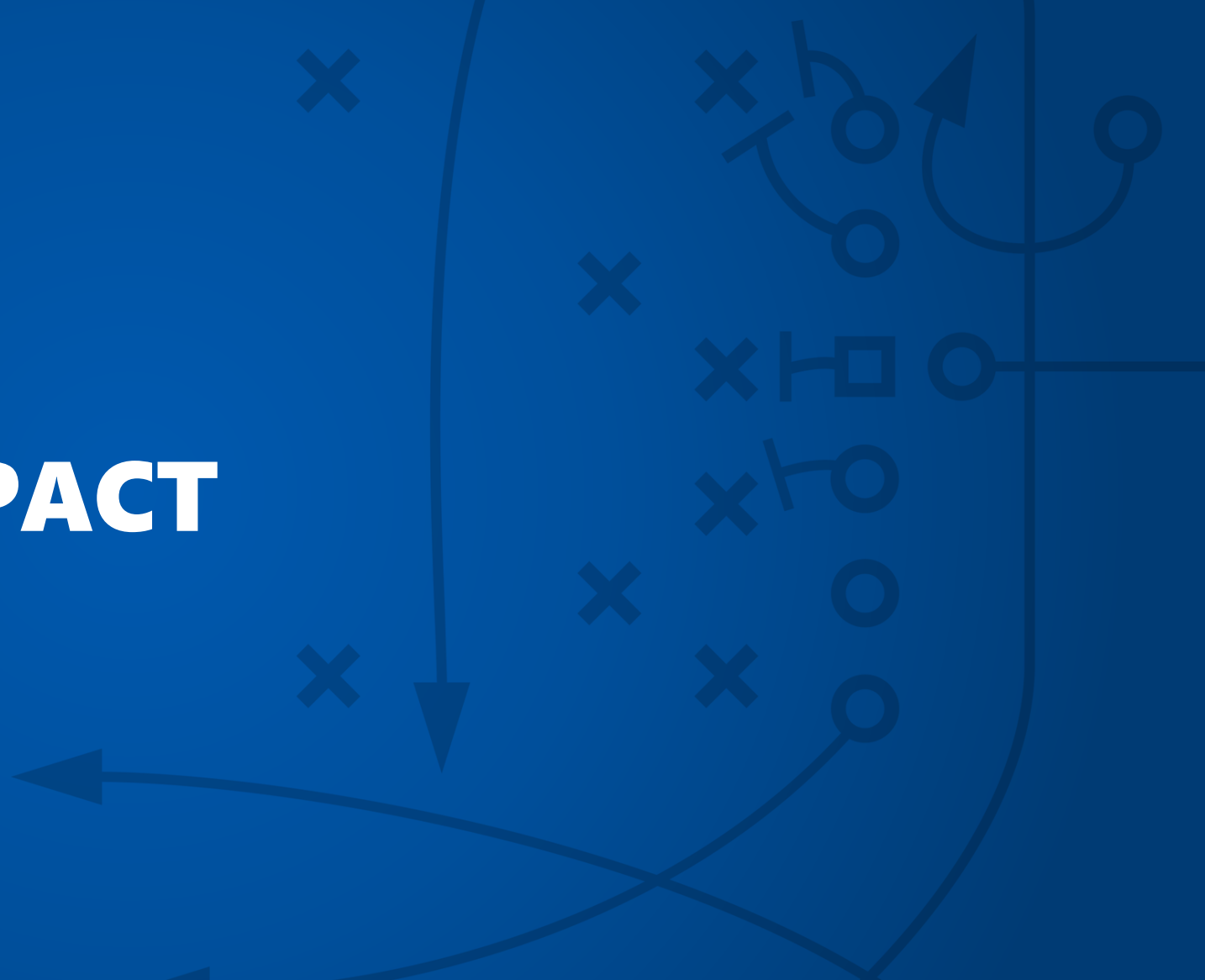
200K+ Fans Engaged on-site in Las Vegas

Accessible fan events, strong attendance and Net Promoter Scores across the week



Nearly \$200M in direct operating income, most in SB history ... lasting impact across NV region

COMMUNITY IMPACT



SUPER BOWL LVIII COMMUNITY IMPACT

LEGACY GRANT PROGRAM



SUSTAINABILITY



NFL SOCIAL RESPONSIBILITY SB PRIORITIES



CHARACTER
PLAYBOOK™

XX

POWERED BY
EVERFI



CRUCIAL
CATCH



TIMELINE COMMUNITY IMPACT

TUESDAY
2/6

NFL Character Playbook

Salute to Service Nellis Air Force Base
Visit

Crucial Catch "LIVE"
Presented by Sleep Number



WEDNESDAY
2/7

NFL PLAY 60 Kids Day

Salute to Service Military
Appreciation Day at SBX

Salute to Veterans,
Hosted by the NFL and Little
Caesars

Inspire Change with Barbershop
Books,
Supported by Microsoft

Pride Flag Football Clinic

THURSDAY
2/8

Unsung Heroes Celebration

NFL Foundation Super Bowl Legacy
Grant Press Conference



FRIDAY
2/9

Walter Payton NFL Man of the Year
Community Day

NFL PLAY 60
Fueled by Gatorade





THANK YOU!

