



POWER OF THE NFL

May 11, 2023



SCOTT LABOUNTY
ACCOUNT DIRECTOR: CLUB BUSINESS DEVELOPMENT



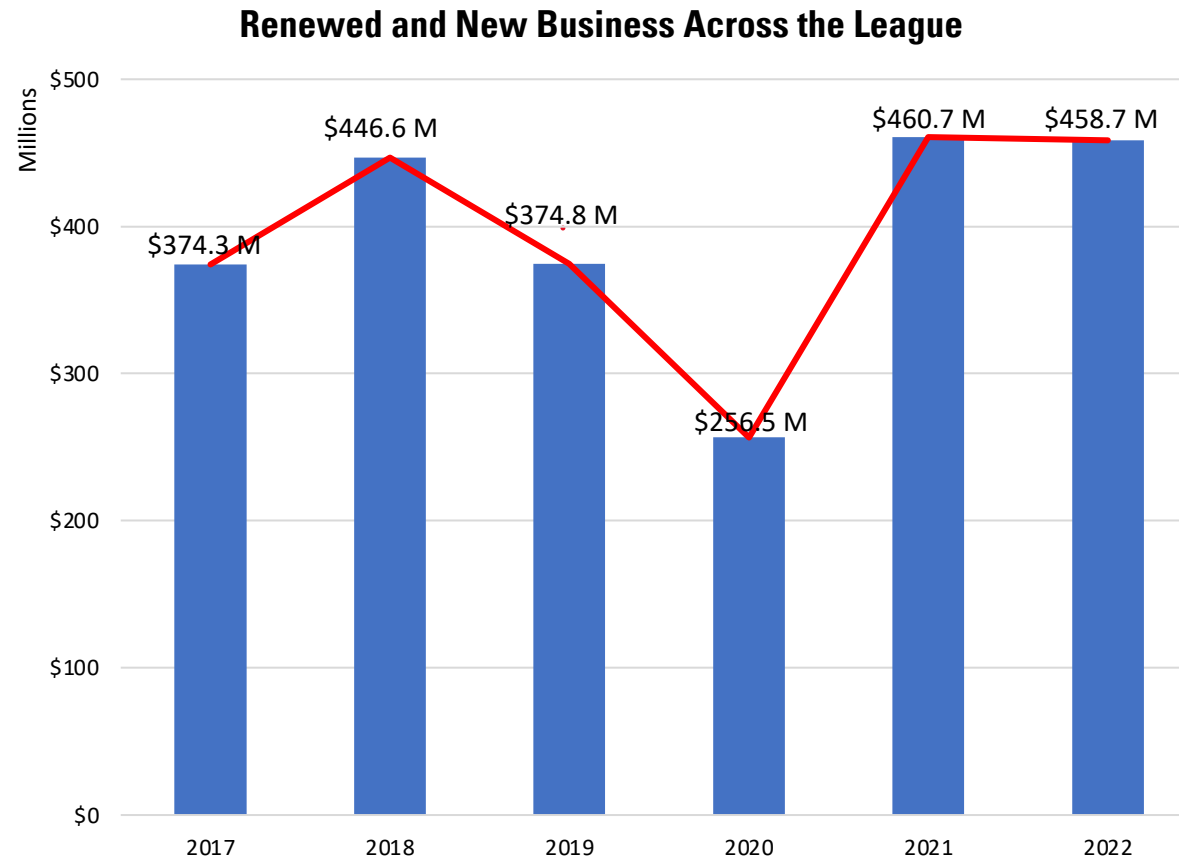
TARYN HUTT
VICE PRESIDENT: CLUB MARKETING

QUALITY V QUANTITY



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- Since 2017, Renewed and New Business across the league has grown by 4.1%
- Within the NFL Club ecosystem there are 3,733 partners across all 32 Clubs, which averages to ~116 partners per Club
- A smaller portion of that are 7-figure deals (508) which have increased at a rate of 8.1% YoY



DOMINANCE OF DIGITAL

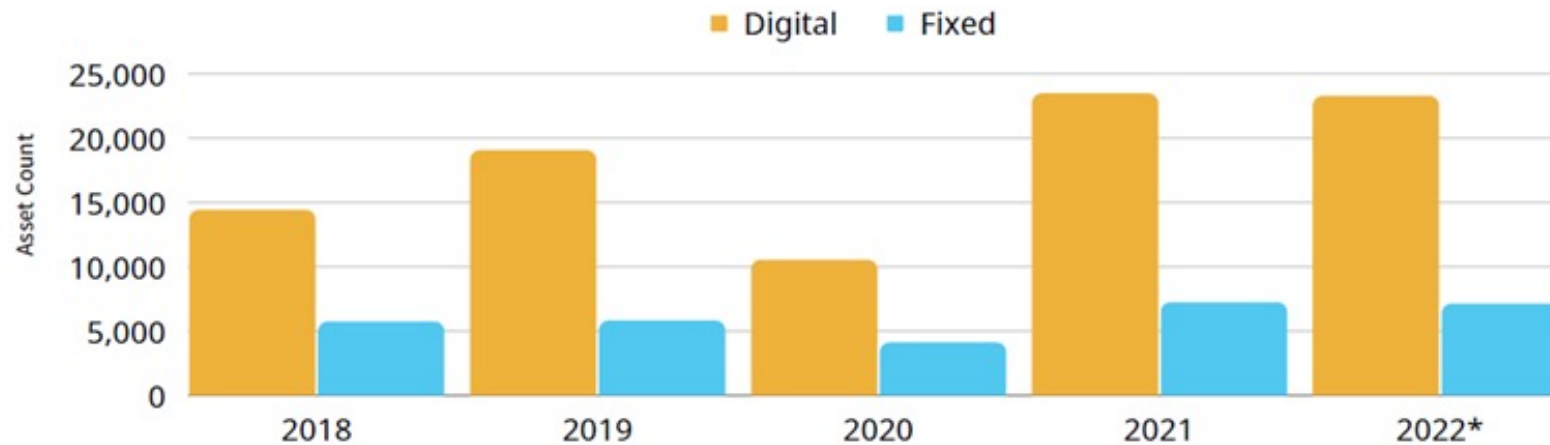


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- The ongoing evolution of digital media has opened up new opportunities for brands to boost visibility and enhance their sponsorship messaging
- With the growth of live sports streaming, leagues and teams can now sell significantly more assets/inventory
 - In their first year, Apple (MLB) and Amazon (NFL) attracted a combined 130 brand advertisers
- In 2022, MLB teams sold digital assets to more than 5x the number of brands vs. fixed or physical assets.
 - Digital in-venue assets secured by brand sponsors have increased almost 120% since 2020, while fixed assets increased just 73%

INCREASED SEPARATION FROM FIXED TO DIGITAL

IN-VENUE MLB, NBA, NFL, MLS, NFL, WNBA, NWSL, PGA/LPGA & WTA/ATP



*NFL, NBA, NHL are still being tracked/in-season

THE VALUE OF CLUB INTELLECTUAL PROPERTY



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- Inclusion of NFL Club IP has a significant and measurable impact on increasing effectiveness of a Sponsor's marketing mix**

- In aggregate, creative including NFL Club IP is 22% more effective than the same assets without

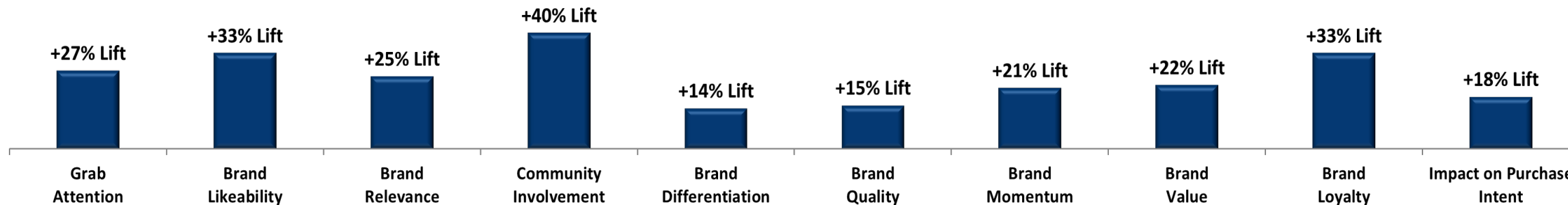
ATTENTION:	Control No Club IP	Test Club IP	% Lift
Grab Attention	45%	57% ↑	+27% Lift
Enjoyable	43%	51% ↑	+19% Lift
Engaging	57%	67% ↑	+18% Lift
CONNECTION:			
Likeability	42%	56% ↑	+33% Lift
Brand Popularity	43%	50% ↑	+16% Lift
Brand Relevance	40%	50% ↑	+25% Lift
Community Involvement	30%	42% ↑	+40% Lift
SUPERIORITY:			
Differentiation	35%	40% ↑	+14% Lift
Brand Trust	42%	50% ↑	+19% Lift
Modern	48%	57% ↑	+19% Lift
Brand Quality	46%	53% ↑	+15% Lift
Is Cool	40%	48% ↑	+20% Lift
Brand Momentum	39%	47% ↑	+21% Lift
CONVICTION:			
Brand Advocacy	35%	43% ↑	+23% Lift
Brand Loyalty	30%	40% ↑	+33% Lift
Brand Value	32%	39% ↑	+22% Lift
Impact on Consideration	40%	47% ↑	+18% Lift

WHAT DO THESE RESULTS MEAN?



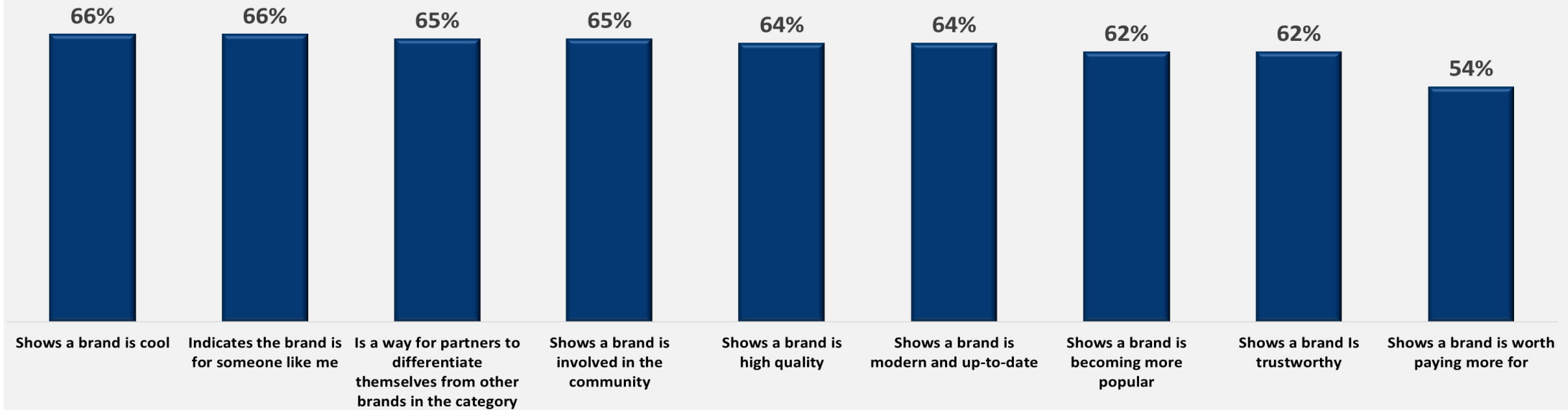
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- Inclusion of NFL Club IP increases the likelihood your product will stand out and capture a consumer's attention.
- Partners that include NFL Club IP in their communications are more likeable.
- Brands featuring NFL Club IP are more relevant to consumers.
- NFL Club IP further amplifies your CSR initiatives.
- NFL Club IP provides you with a point of differentiation over your competitors.
- Partners using NFL Club IP are perceived to be of higher quality.
- Inclusion of NFL Club IP increases perceptions that our partners have positive brand momentum.
- Consumers will pay more for brands that include NFL Club IP in their communications.
- Inclusion of Club IP in brand communications has an impact on brand loyalty and a consumer's likelihood to purchase our partners' products and services.



NFL Club IP Enhances Perceptions of Relevance, Brand Differentiation, Quality, Popularity, and Overall Trust

Perceptions When NFL Club IP Is Included In Advertising/Packaging
Top 3 Box Summary

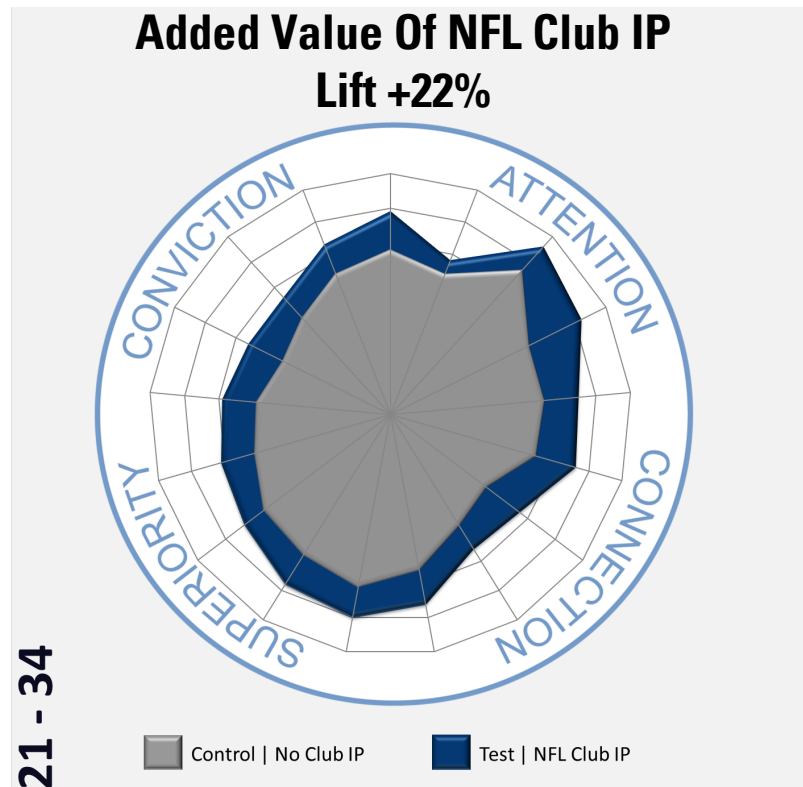


KEY MARKETING DEMOGRAPHICS



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- Creative including NFL Club IP are **22% more effective** among 21–34 year-olds than the same assets without
- Creative including NFL Club IP are **28% more effective** with females



ATTENTION:	Control No Club IP	Test Club IP	% Lift
Grab Attention	48%	59%	+23% Lift
Enjoyable	44%	48%	+9% Lift
Engaging	57%	66%	+16% Lift
CONNECTION:			
Likeability	45%	62%	+38% Lift
Brand Popularity	45%	55%	+22% Lift
Brand Relevance	44%	56%	+27% Lift
Community Involvement	35%	47%	+34% Lift
SUPERIORITY:			
Differentiation	38%	46%	+21% Lift
Brand Trust	46%	56%	+22% Lift
Modern	51%	60%	+18% Lift
Brand Quality	48%	58%	+21% Lift
Is Cool	46%	53%	+15% Lift
Brand Momentum	41%	51%	+24% Lift
CONVICTION:			
Brand Advocacy	39%	49%	+26% Lift
Brand Loyalty	35%	46%	+31% Lift
Brand Value	38%	46%	+21% Lift
Impact on Consideration	44%	53%	+20% Lift

POWER OF THE NFL: UNPARALLELED REACH



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#1 FAN BASE ACROSS TOTAL U.S. POPULATION and important audience groups



#1 in U.S. across
all age groups
including Gen Z & Kids



47% of U.S. NFL
fans are women
(highest of any League)

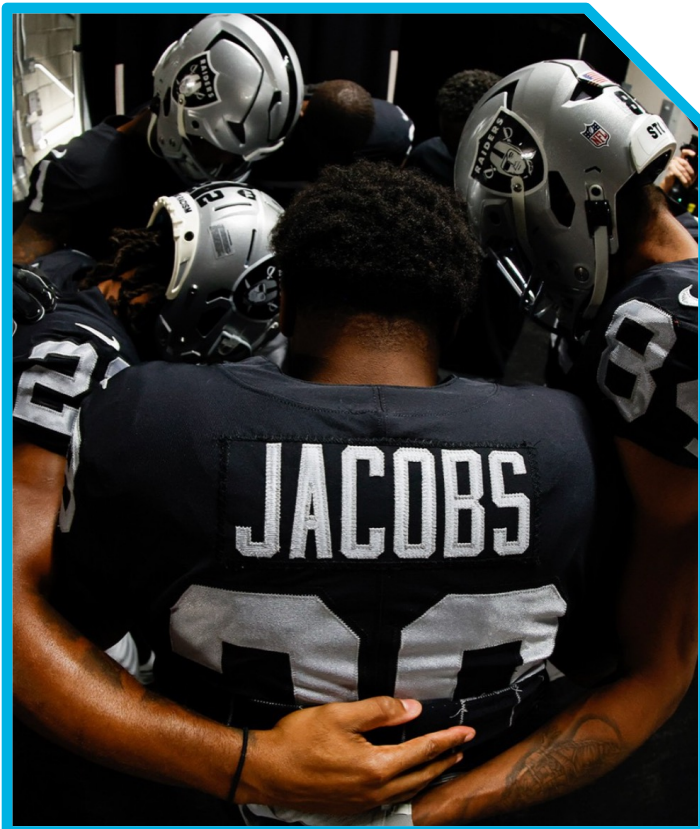


#1 In U.S. among
people of color

NFL FAN ENGAGEMENT IS STRONGER THAN EVER

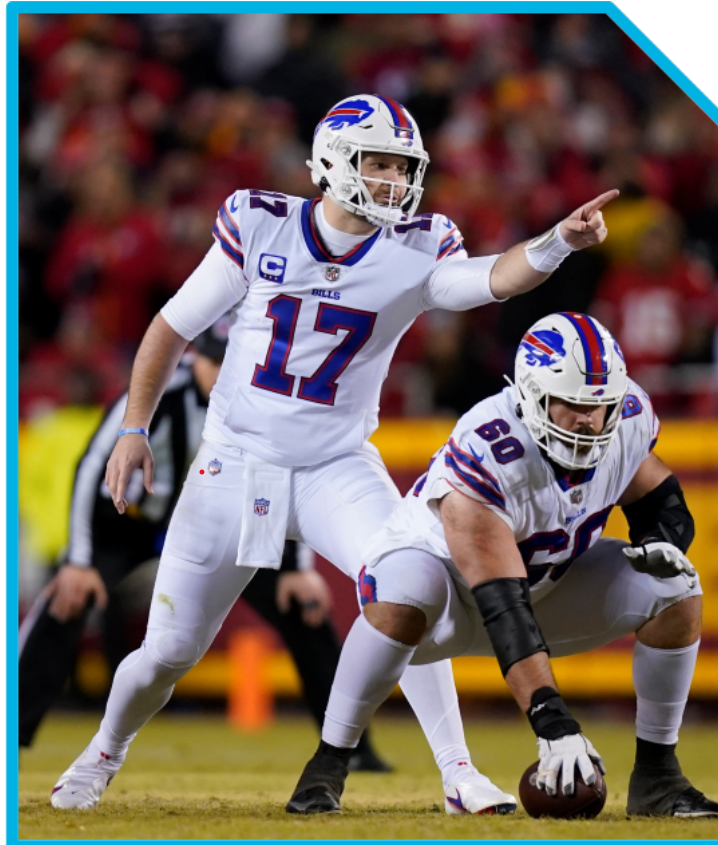


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88

**OF TOP 100
TELECASTS ON TV**



16.7M

**AVERAGE REGULAR SEASON
VIEWERS**



260M+

**US & INTL SUPER BOWL
VIEWERSHIP**

ENGAGEMENT WITH THE NFL OUTPACES THE COMPETITION



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14B HOURS

TOTAL ENGAGEMENT (TV,
SOCIAL, ATTENDANCE, ETC.)
WITH NFL

6X

NFL DROVE OVER 6X THE
CONTENT CONSUMPTION AS
NEXT HIGHEST LEAGUE

75%

TOTAL CONSUMPTION ACROSS
SPORTS LEAGUES, DESPITE
HAVING 11% OF GAMES

NFL DELIVERS UNMATCHED SCALE & ATTENTION



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NO OFFSEASON

LEADING US FAN INTEREST ACROSS 12 MONTHS

50%

NFL'S Average Share of Attention Across Full Year Among Major Sports

2.7B

Word-of-Mouth Conversations During the '22 Season

1B+

Social Followers Across the NFL Ecosystem



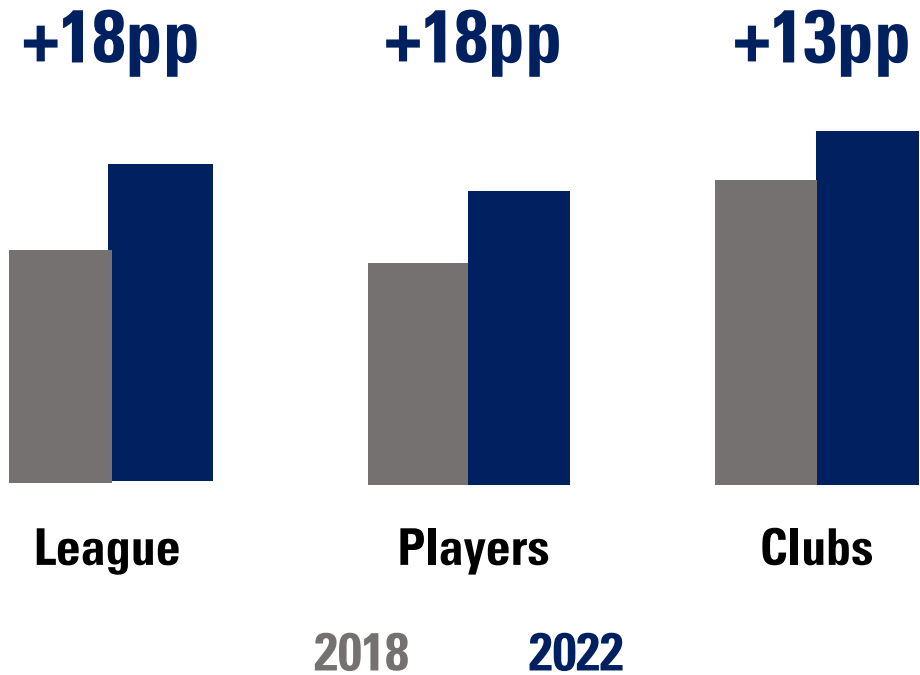
Source: NFL as a Platform 2022 Season, Crowdtangle & Native Platform Insights, 2022.

FAN PERCEPTION OF NFL BRAND IS AT AN ALL-TIME HIGH



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Net Perception Among NFL Fans



Driven by NFL Growth in Key Brand Attributes



All-time high League perception across total fanbase and key demos, including 12-24, Latinos, Women.

A NEW FACE TO THE NFL COMPREHENSIVE "HELMETS OFF" STRATEGY



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HUMAN



**YOUTHFUL &
MODERN**



INCLUSIVE

TWO-PRONGED BRAND MESSAGE APPROACH



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JOY OF THE GAME



TRANSCEND THE GAME



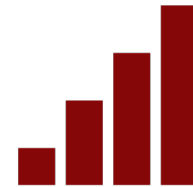
POWER OF THE RAIDERS

The Raiders Fan Base by the Numbers



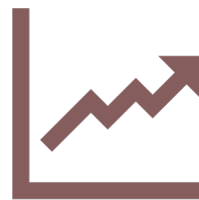
5.1M

total Raiders Fans
Nationally



+1.8M

Fan base growth
versus 2021



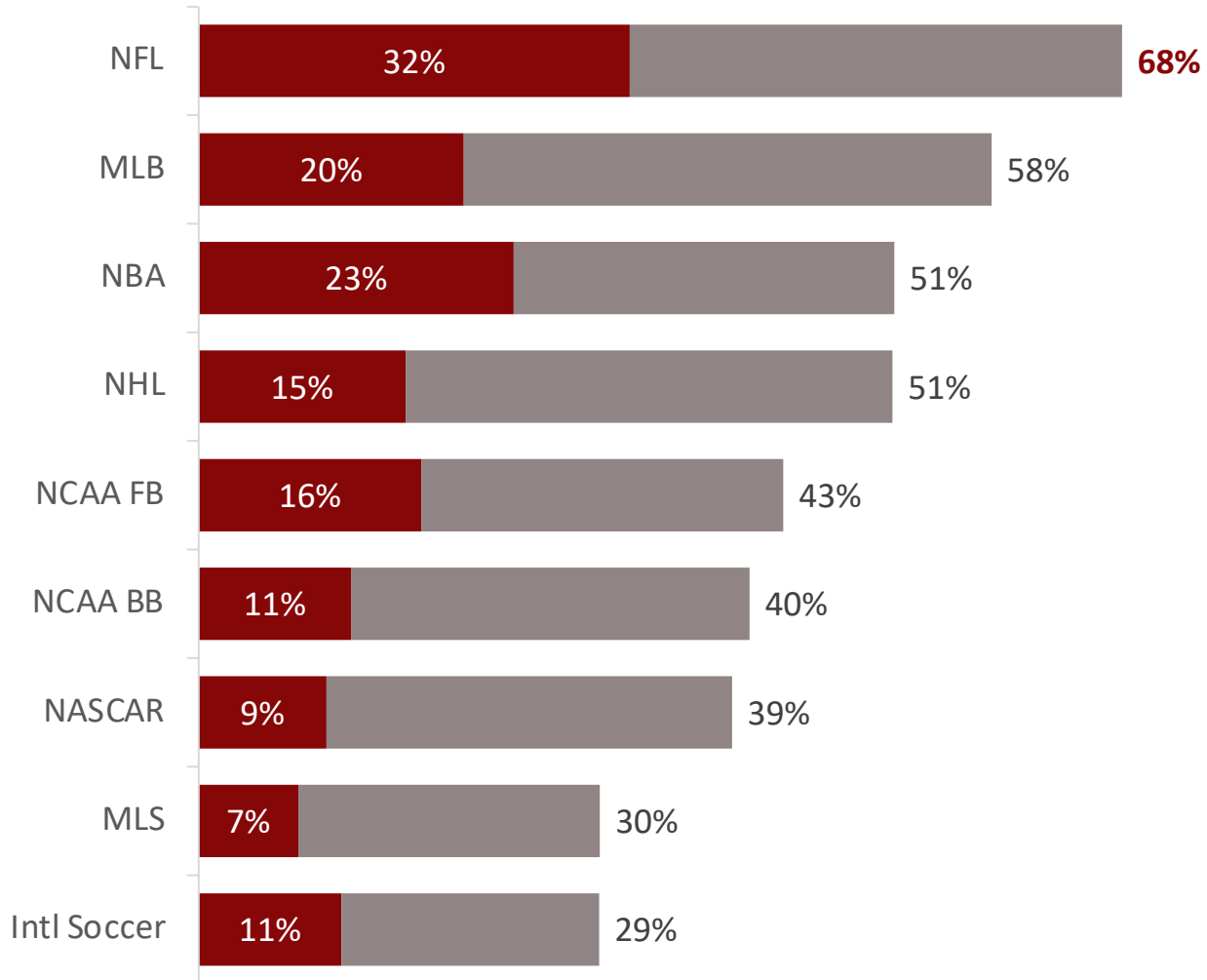
+6.2M

more fans
with secondary favorite
team (11.3M total)



% Fandom by Sport in Las Vegas DMA

■ Avid Fans ■ Casual Fans Total Fans

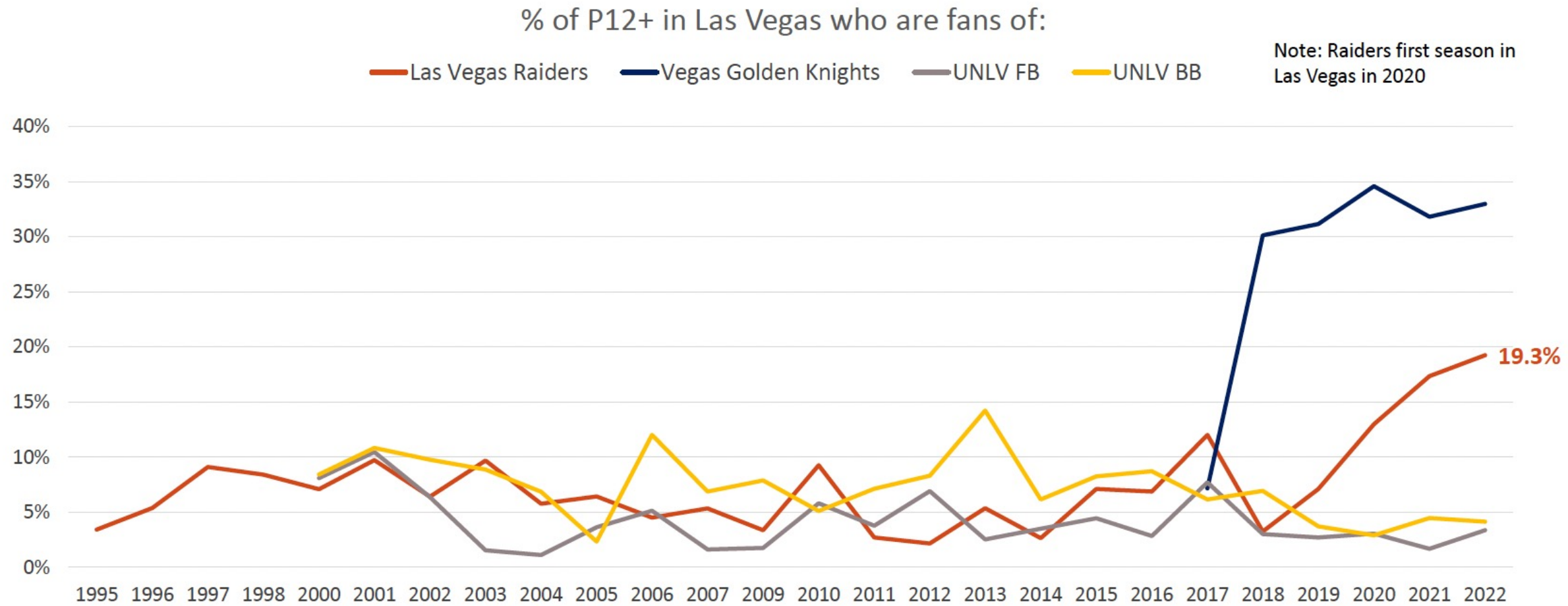


68% of P12+ in Las Vegas are Fans of the NFL – Making the NFL the #1 Fan Base in Las Vegas



Source: SSRS/Luker on Trends Sports Poll 2022

The Raiders Local Fan Base is the Second Largest in Las Vegas and Continues to Trend Up in 2022



- **Tap into the Scale & Diversity of the NFL Fan Base**

- NFL is the favorite sport in Las Vegas
- Raiders fans over-index as younger, more diverse, and more likely to be male

- **Grow Together**

- Invest in activating against key demos in LV DMA
- Drive behaviors that build mutual brand love & engagement
- Strive for relevance and avoid over-commercialization
- Lead with authentic purpose & inclusivity to continue to win with Youth & Latinos



THANK YOU