



NATIONAL FOOTBALL LEAGUE

THE MARKET

In contemporary American society, the amount of entertainment options is expansive and diverse. Despite such competition, the National Football League continues to thrive in this ultracompetitive environment.

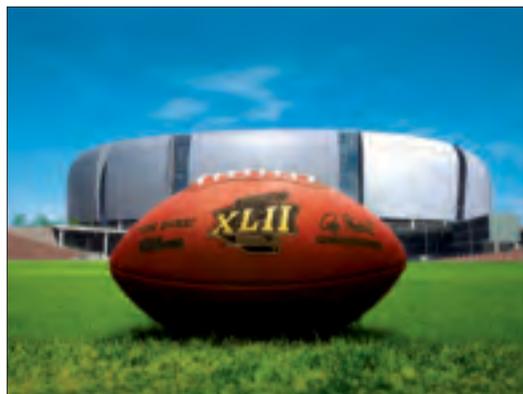
In February 2009, more Americans than ever before gathered around televisions across the country to witness Super Bowl XLIII played between the Pittsburgh Steelers and the Arizona Cardinals. In its 43rd incarnation, the Super Bowl remained a captivating event.

Quite simply, no other American sports league bridges generations and has fans with such an ardent connection as the National Football League. NFL fans trumpet their team loyalties with apparel and merchandise and cheer with every turn of the unfolding drama, in stadiums and in front of televisions across the country. The NFL is America's passion.

ACHIEVEMENTS

By any estimate, the NFL has evolved into something that transcends the boundaries of sport. The Super Bowl, in particular, delivers not only unsurpassed numbers of viewers — the ten most-watched television shows in history are all Super Bowls — but also delivers coveted demographics not seen anywhere else. The Super Bowl serves as an unparalleled forum for companies to launch new products and entire marketing campaigns, as few people turn away from their sets during the game.

For more than four decades, Harris Interactive has ranked the NFL as the most popular



sport in America. In 2008, professional football was the favorite sport of as many people (30 percent) as the combined total of the next three professional sports: baseball (15 percent), auto racing (10 percent), and hockey (5 percent). In addition, pro football has gained in popularity more than any other sport over the past 20 years, with a 6 percent increase over those two decades (from 24 percent to 30 percent).

An ESPN Sports Poll shows that the percentage of fans who own NFL sports apparel (39 percent) surpasses the total percent of fans who own sports apparel from Major League Baseball, the National Basketball Association, and the National Hockey League combined.

Fans of all backgrounds have embraced the NFL like no other sport. NFL games trump those of the NBA and MLB among Hispanic and African American audiences, according to Nielsen and ESPN Sports Polls. Furthermore, NFL games are broadcast in 231 countries and territories and in 32 languages. More than 45 million women watch

NFL games each weekend, and more women watched Super Bowl XLII (69.7 million) than total viewers watched the 80th Annual Academy Awards in 2008 (64.2 million).

The NFL is the number-one American sport in cyberspace, too. Through November 2008, the NFL Internet Group has averaged more than 11 million unique views per month, 18 percent higher than the next highest sports league (MLB at 9.6 million), according to ComScore.

HISTORY

The NFL boasts a proud and storied past, but it started rather modestly. Founded in Canton, Ohio, by a group of seven individuals representing four clubs, the early days featured teams in 14 cities playing before diminutive crowds with little fanfare or public notice. Towns such as Akron, Ohio, and Rock Island, Illinois, were among the early communities that boasted NFL franchises.

Strategically, the NFL game was virtually indistinguishable from the college football game. For several years, there was no attempt to break away from college rulebooks or playbooks. The NFL even followed the NCAA Rules Committee's recommendations in the early days of the fledgling league.

Players considered the NFL a part-time job and held other jobs during the day. Thus, while college coaches enjoyed the luxury of drilling their players for hours on end, professional coaches had to make due with evening practices often only three times per week.

The popularity of the professional game slowly began to equal its college rival after the NFL instituted its inaugural player draft in 1936. College players began to be more and more intrigued by the prospect of continuing to play the game they loved and get paid for it. Consequently, the marquee college players, who would have previously leveraged their college notoriety in the conventional workforce,



began signing professional contracts in droves, spiking interest and attendance. However, World War II undid a lot of those gains, draining many of the early professional franchises of players and money.

In 1946, the All-America Football Conference (AAFC) was established as a rival to the

GREEN FOCUS

As a socially responsible organization, the NFL has been endeavoring to adopt green policies wherever possible. At Super Bowl XLIII in Tampa Bay in 2009, the NFL used renewable energy to power the stadium and the NFL Experience (a football festival that appears in the host city for the week leading up to Super Bowl Sunday). Alternative fuels for Super Bowl transportation were also used. Any and all materials collected in waste receptacles are rounded up, sorted, and recycled whenever possible.

NFL. The most powerful team in this budding league was the Cleveland Browns, coached by innovator Paul Brown. The AAFC's Browns and the NFL's Los Angeles Rams made great social strides in 1946 by signing two African American players each in the year before Jackie Robinson broke the color barrier in Major League Baseball.

In 1950, the Cleveland Browns, San Francisco 49ers, and Baltimore Colts joined the NFL in a merger. The move ushered in a period of gradual gains in both popularity and prosperity, but it was with the advent of television that the NFL really enjoyed an explosion of growth. In 1956, the Columbia Broadcasting System (CBS) began to broadcast select games. In what many observers still call the greatest game ever played, the 1958 NFL Championship (a Baltimore Colts win over the New York Giants) represented a seminal moment in NFL history. This pairing of television and football reaped immediate rewards, boosting national interest and overall appreciation for the league and the sport. Seeing that a profit could be made from professional football, Texas businessmen Lamar Hunt and Bud Adams formed the American Football League (AFL) in 1960 as a rival to the NFL. The two leagues fought bitterly for player rights, media attention, and profits before ultimately joining forces in a decisive merger in 1966.

The first AFL-NFL World Championship Game, later renamed Super Bowl I, was played in Los Angeles in January 1967. By 1970, the league formed into two 13-team conferences under the NFL name. Today, the NFL has grown to 32 member clubs and has become America's most popular sports league.

The 2008 season represented the NFL's 89th, and the health of the game remains strong. In 2008, people were watching: attendance at games remained steady, and NFL games were the top

three as well as 13 of the 15 most-watched shows of the TV season. Furthermore, the NFL took on three new partners during the 2008 season, inking sponsorship deals with Kellogg's, Monster, and KFC, in addition to renewing many existing partnerships.

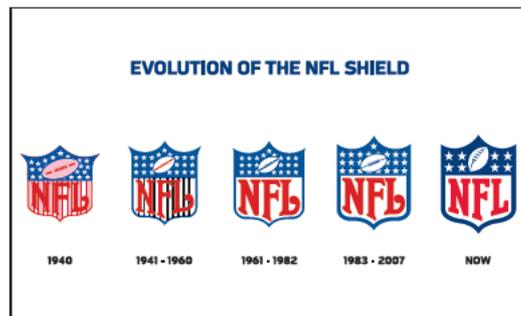
THE PRODUCT

The appeal of the NFL is easily perceived: a distinctive level of parity ensures close games and a relative unpredictability of who will win each game. Blend that with astonishing athletic skill, and you have a visual and visceral feast. Plus, NFL teams have made it a priority to turn games into events, resplendent with interactive theme parks and family-focused activities. The NFL has made it a point to build attractive and fan-friendly destinations, with 26 stadiums constructed or significantly refurbished since 1992.

In November 2003, the NFL launched NFL Network: the first 24-hour television network devoted solely to football.

NFL Network's unique access transports fans inside the game, taking advantage of NFL Films' mesmerizing 100 million feet of footage. It also broadcasts a late-season eight-game package.

As part of an ongoing commitment to reaching young fans, the NFL launched NFLRUSH.com, its official website for kids, in 2006. Then in 2008, the NFL became the first sports league to offer an online role-playing game with the introduction of the NFL RushZone.



RECENT DEVELOPMENTS

In an ever-changing media landscape, the NFL also recently launched a makeover of its shield trademark. The leaner, cleaner version of the logo debuted at the 2008 NFL Draft. The new version retained the character of this iconic logo that had only been redesigned three times since its inception in 1940, and had not been altered at all since the early 1980s.

In 2007, at a sold-out Wembley Stadium in England, the NFL played its first regular-season game outside of North America, a groundbreaking first in global sports. Broadcast in more than 200 countries throughout the world, the game made a bold statement to the NFL's intent on expanding beyond domestic U.S. borders, sharing the passion of its brand with the world.



PROMOTION

The unwavering fan commitment to the NFL is perhaps exceeded only by the NFL's commitment to civic engagement. For 35 years, the NFL has forged a remarkable partnership with the United Way, providing airtime to the charitable organization in what is the longest-running public service campaign in television history. In recent years, the NFL has committed itself to reversing the childhood obesity epidemic plaguing America's youth. The league's new NFL PLAY 60 campaign utilizes NFL players and the equity of the sport to encourage young people to get out and play for 60 minutes a day.

BRAND VALUES

At its fundamental core, the essence of the NFL brand is intense, unifying, and meaningful. The NFL brand represents so much more than just a game. The NFL is about heroes and superhuman feats; tradition and ritual; and honor, courage, teamwork, and integrity. The love America derives from the NFL owes a considerable debt to the brand attributes that the NFL brand projects and the keenly evident parallels between that which epitomizes the NFL and the inherent values Americans hold most dear.



THINGS YOU DIDN'T KNOW ABOUT THE NATIONAL FOOTBALL LEAGUE

- The official game ball, made by Wilson, contains the name "The Duke" in honor of the late New York Giants owner Wellington Mara.
- In partnership with America's Second Harvest Food Bank, all the prepared food left over from Super Bowl events is collected and donated in a timely fashion to local soup kitchens, shelters, and churches.