



Thriving in the NFL's Smallest Market

February 16, 2016

Vision

To become and remain the standard of excellence against which all other organizations in professional sports are measured.

Mission

To win championships and deliver excellent guest experiences while being guided by our core values.

Values

Teamwork - We work together to achieve our goals through a strong work ethic, mutual trust and appropriate communication.

Respect - We make the commitment that all our actions and communications will be considerate toward coworkers, partners and guests.

Stewardship - We foster and advance our community-founded organization and its rich tradition for future generations.

Integrity - We work ethically in every aspect of our operations while remaining loyal to our coworkers and the values of the organization.

Excellence - We continually focus our efforts on pursuing the highest levels of performance throughout the organization.

Mission: Win Championships

- **13x Champions – 1st!**
- **Since 1992, we have**
 - **Second-best regular season record (244-139-1)**
 - **Playoffs in 18 seasons**
 - **.500 or better in all but 2 seasons**



Mission: Excellent Guest Experience

Consistently ranked #1 or 2 in NFL's Annual Customer Satisfaction Survey

Lambeau or Bust: NFL Experience Incomplete Without a Trip to Green Bay

Updated: February 3, 2010, 3:14 PM ET
By Doug Ward | Special to ESPN SportsTravel



THE 8TH WONDER
OF THE WORLD
LAMBEAU FIELD

GREEN BAY PACKERS

2014 NFL Voice of the Fan Results

Ranked in Top 5 of All 32 NFL Teams

Overall Gameday Satisfaction –
1st in NFL

Arrival – 1st in NFL

Departure – 2nd in NFL

Safety & Security – 1st in NFL

Gameday Staff – 1st in NFL

Merchandise – 1th in NFL

Technology – 4th in NFL

The Packers Off the Field



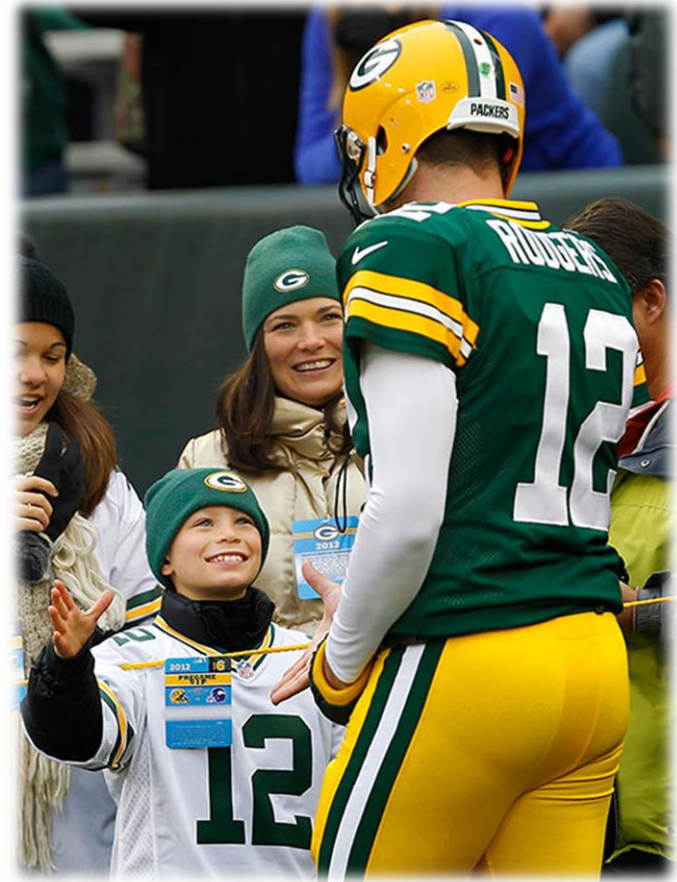
GREEN BAY PACKERS

Uses of Revenue

- 1. Win Championships**
- 2. Deliver Excellent Guest Experiences**
- 3. Give Back to the Community**
- 4. Save for a Rainy Day**

Community Outreach

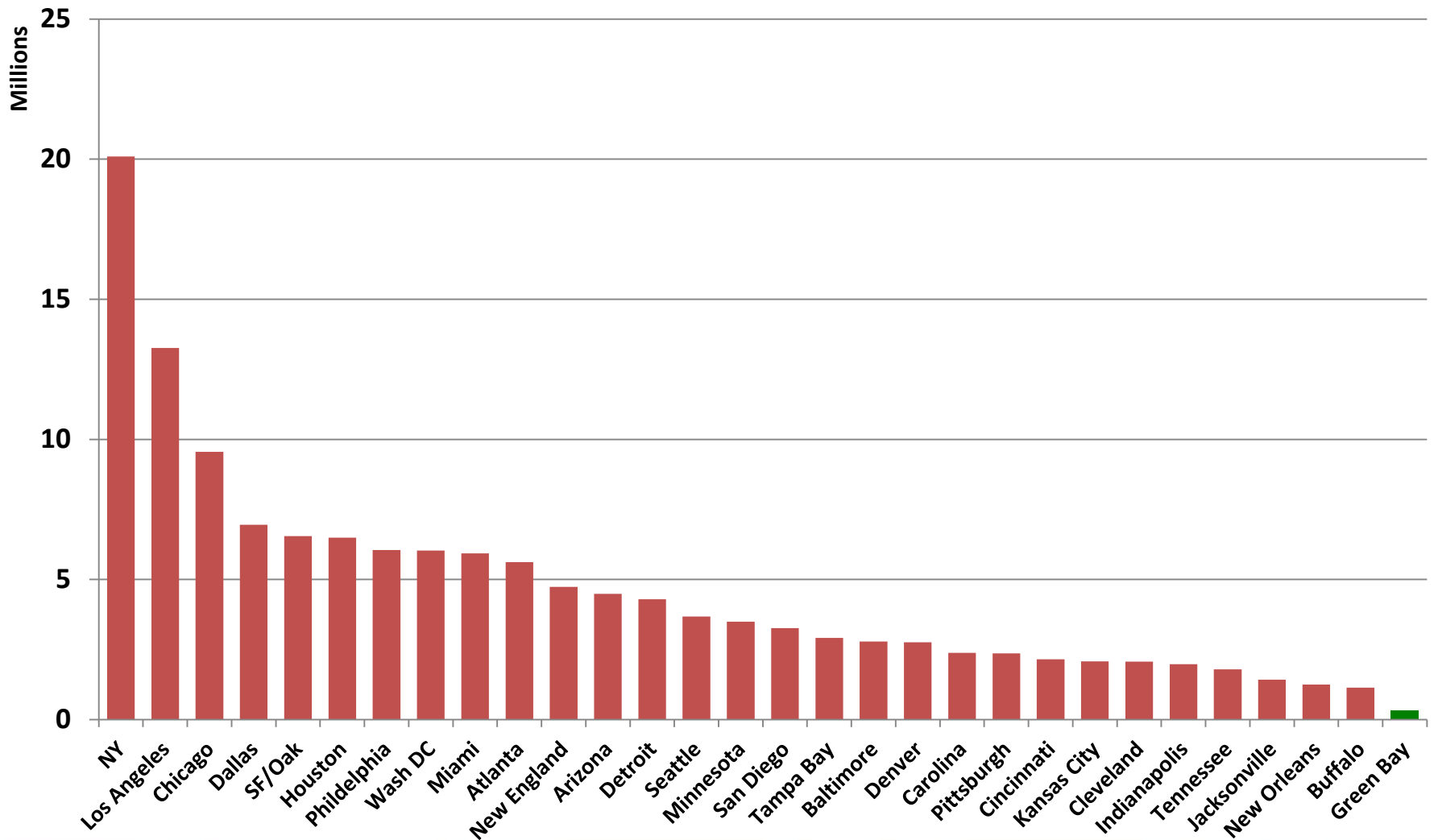
- Packers Give Back
- Cash & In-Kind Donations
- Alumni/Player Appearances
- Youth Football, Play 60
- Community QB
- Wish Granting
- Mentor-Protégé



Values: Stewardship

Winning **football**
performance on the field
requires winning **financial**
performance off the field

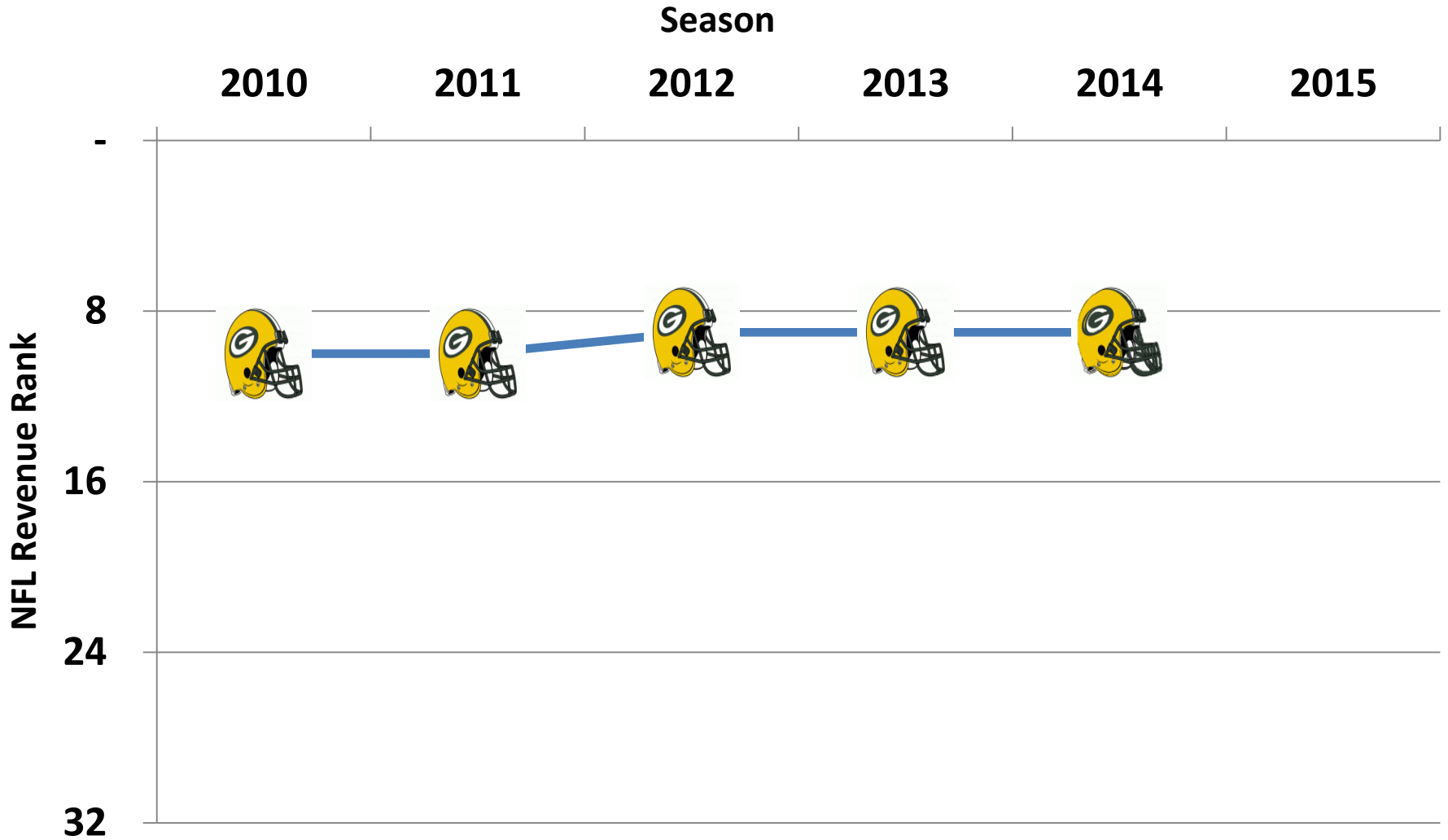
Green Bay is NFL's Smallest Market



Defunct NFL Franchises

- **Akron Pros** (1920–26)
- Baltimore Colts (1950)
- Boston Yanks (1944–48) / New York Bulldogs (1949) / New York Yanks (1950–51) / Dallas Texans (1952)
- Brooklyn Dodgers/Tigers (1930–44)
- Brooklyn Lions (1926)
- Buffalo All-Stars (1920–27, 1929)
- **Canton Bulldogs** (1920–23, 1925–26)
- Chicago Tigers (1920)
- Cincinnati Celts (1921)
- Cincinnati Reds (1933–34)
- Cleveland Indians (1931)
- Cleveland Indians/**Bulldogs** (1923–25, 1927)
- Cleveland Tigers/Indians (1920-21)
- Columbus Panhandles/Tigers (1920–26)
- Dayton Triangles (1920–29) (now the Colts?)
- Detroit Heralds (1920)
- Detroit Panthers (1925–26)
- Detroit Tigers (1921)
- Detroit Wolverines (1928)
- Duluth Kelleys/Eskimos (1923–27)
- Evansville Crimson Giants (1921–22)
- **Frankford Yellow Jackets** (1924–31)
- Hammond Pros (1920–26)
- Hartford Blues (1926)
- Kansas City Blues/Cowboys (1924–26)
- Kenosha Maroons (1924)
- Los Angeles Buccaneers (1926)
- Louisville Breckenridges (a.k.a. "Brecks") (1921–23)
- Louisville Colonels (1926)
- Massillon Tigers (1920) (never played a game)
- Milwaukee Badgers (1922–26)
- Minneapolis Marines (1921–24)
- Minneapolis Red Jackets (1929–30)
- Muncie Flyers (1920–21)
- New York Brickley Giants (1921)
- New York Yankees (1926 1st AFL)(1927–28 NFL)
- Newark Tornadoes (1930)
- Oorang Indians (1922–23)
- Orange Tornadoes (1929)
- Pottsville Maroons/Boston Bulldogs (1925–29)
- **Providence Steam Roller** (1925–31)
- Racine Legion (1922–24)
- Racine Tornadoes (1926)
- Rochester Jeffersons (1920–25)
- Rock Island Independents (1920–25)
- St. Louis All Stars (1923)
- St. Louis Gunners (1934)
- Staten Island Stapletons (1929–32)
- Toledo Maroons (1922–23)
- Tonawanda Kardex (1921)
- Washington Senators (1921)

NFL Revenue Ranking

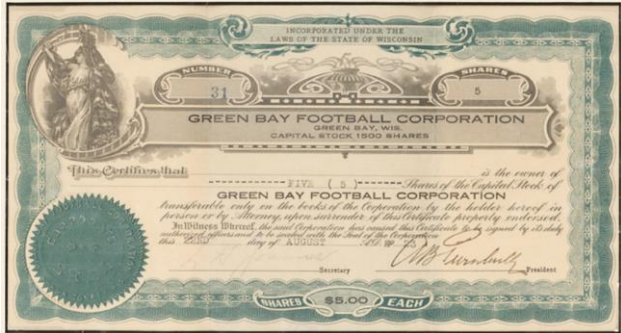


Key Financial Factors

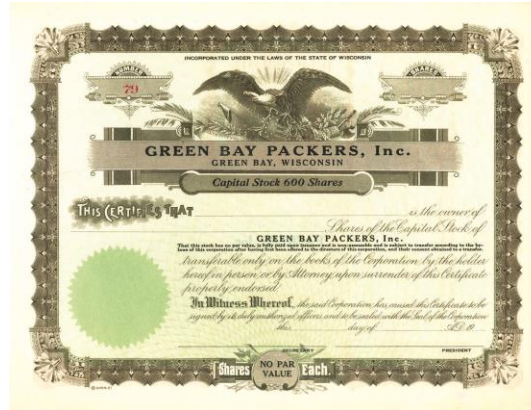
- **Fan Support**
- **NFL Economics**
- **Brand**



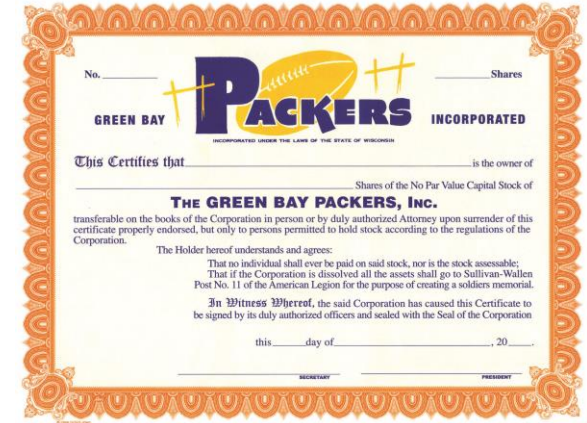
Fan Support: Stock Sales



1923



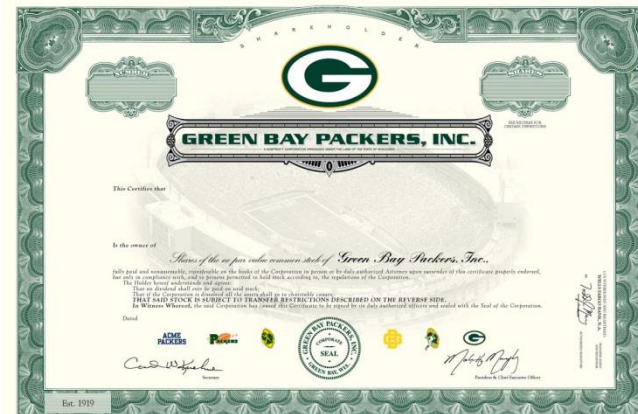
1935



1950



1997



2011

GREEN BAY PACKERS

Passionate Fan Support Year-Round



Game Day

- Admissions, concessions, parking
- Broadcasting, signage & sponsorship



Non-Game Day

- Packers Pro Shop
- 1919 Kitchen & Tap
- Hall of Fame
- Tours
- Special Events

NFL Economics: the Best in Sports

- **Highest Percentage of National Revenue**
- **Hard Salary Cap**
- **Revenue Sharing System**

Growth of Broadcast Revenues

“Then”



+



Now



+

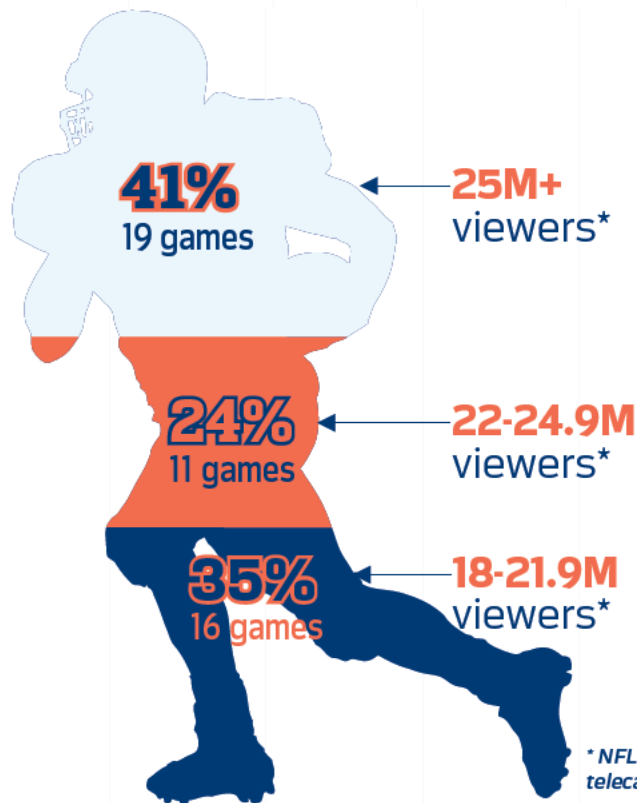


GREEN BAY PACKERS

NFL Season Dominates Broadcast Calendar



NFL games account for the **TOP 25** & **46 of the TOP 50** most-watched shows on TV since Kickoff on Sept. 10



* NFL games in the top 50 most-watched telecasts since Kickoff on Sept. 10

NFL Viewership

Non-NFL telecasts that ranked in top 50

#26 GOP Debate

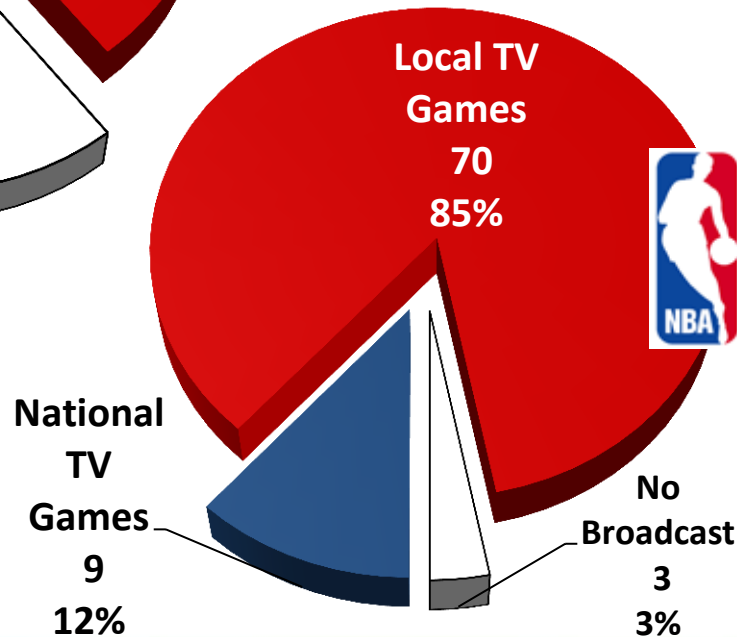
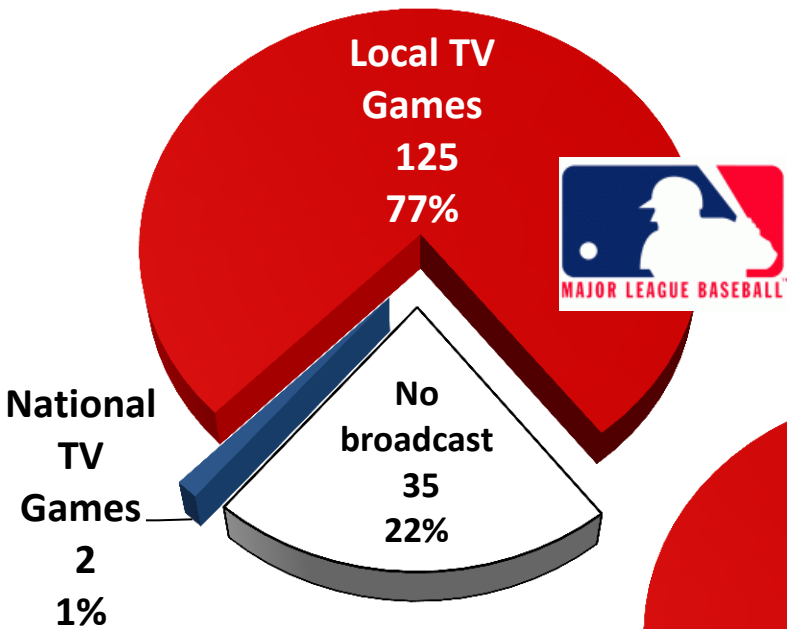
#30 Macy's Thanksgiving Parade

#33 New Year's Rockin' Eve Part 1

#49 CFP Semifinal: Michigan State-Alabama

Source: NFL & Nielsen Media Research. Live + Same Day Data Stream, Minimum Telecast Length of 25 minutes.

100% National NFL Broadcast Revenue



NFL: Highest National Revenue

National Revenue



Local Revenue

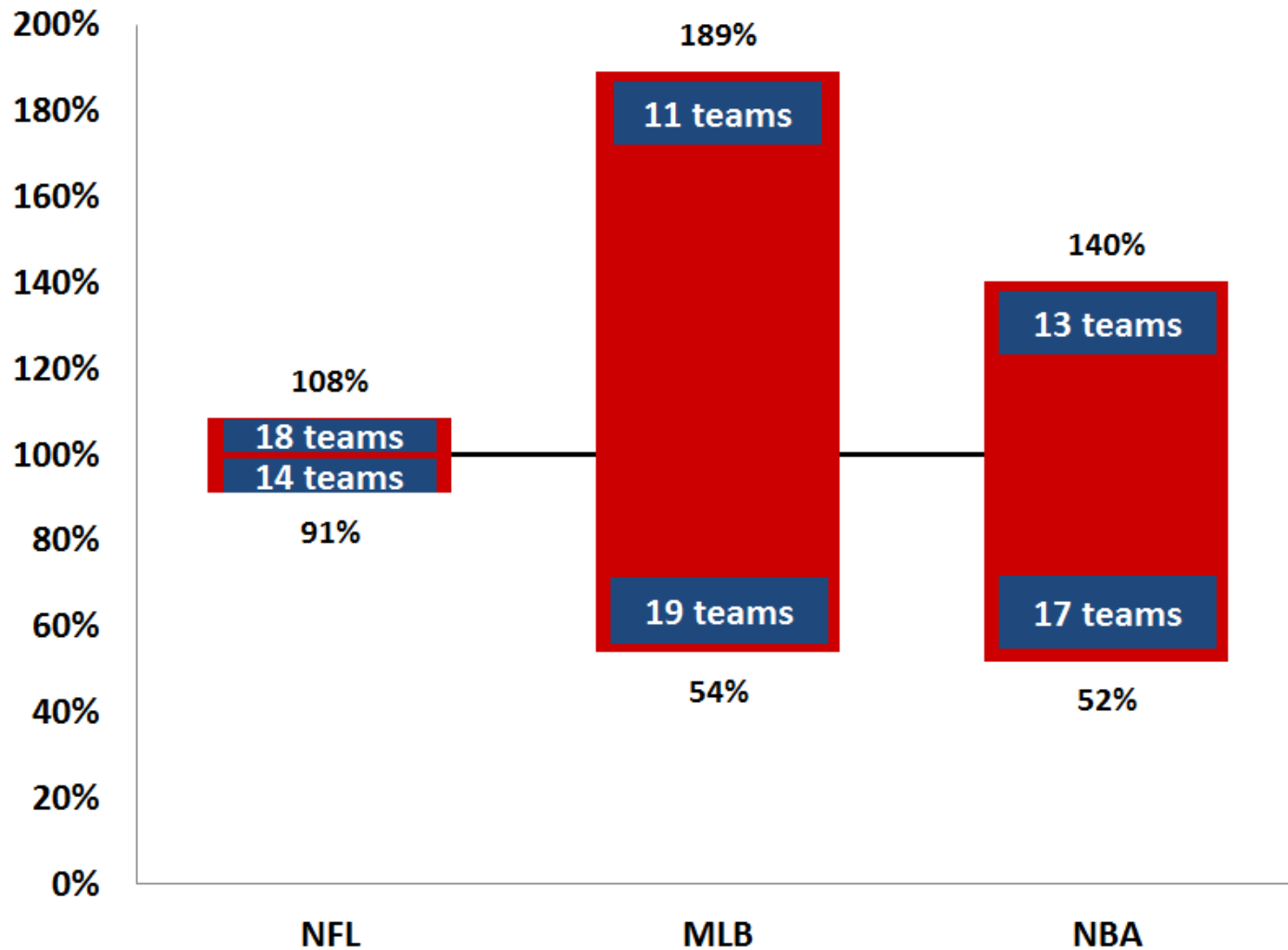


GREEN BAY PACKERS

NFL Clubs' Shared Revenues

| <u>Revenue Source</u> | <u>% Shared</u> | <u>Average Team Revenue</u> |
|------------------------|-----------------|-----------------------------|
| National Revenue | 100% | 60% |
| Ticket revenue (Local) | 34% | <u>22%</u> |
| | | 82% |

NFL Hard Salary Cap



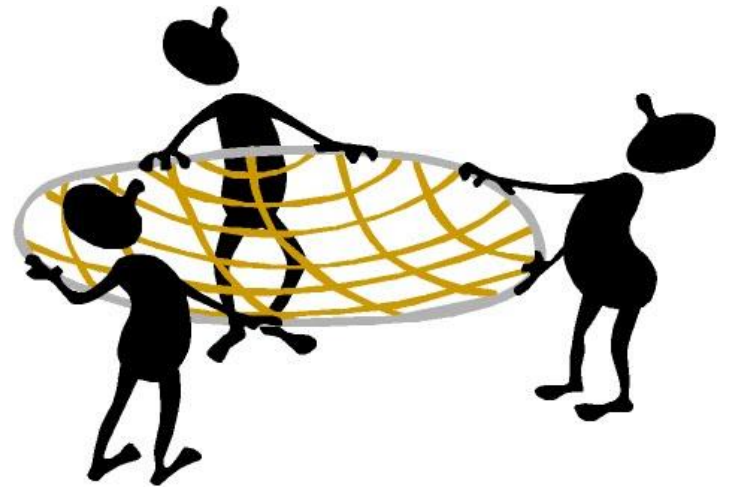
...Improves Competitive Balance

13 Different Teams have
won the Super Bowl since
1995



Revenue Sharing

- Gate Revenue
- Supplemental Pool



NFL's Economic Success



Packers Brand

- **Fan-centered**
- **Legendary Excellence**
- **Tradition, Honorable**
- **Iconic Stadium**



Perfection is not attainable, but if we chase perfection we can catch excellence.

- Vince Lombardi



The Lambeau Field Experience

- **2nd Oldest NFL Venue (1957)**
- **Hosted 5 Championship Games**
- **15-5 in Playoff Games at Lambeau Field**
- **7 Championship Teams since 1957**
- **123,000+ on waiting list!**



Reinvestment



The 2011 CBA

- **10-Year Term**
- **Health & Safety**
- **Economics & Stadium Reinvestment**

Lambeau Field - 2010



GREEN BAY PACKERS

Lambeau Field's 9th Renovation

Improving the Stadium Experience

- **Sound System (2011) & Scoreboard (2012)**
- **South End Zone Seating (2013)**
- **3 New Gates: Bellin (2012), Shopko (2013) & American Family (2014)**

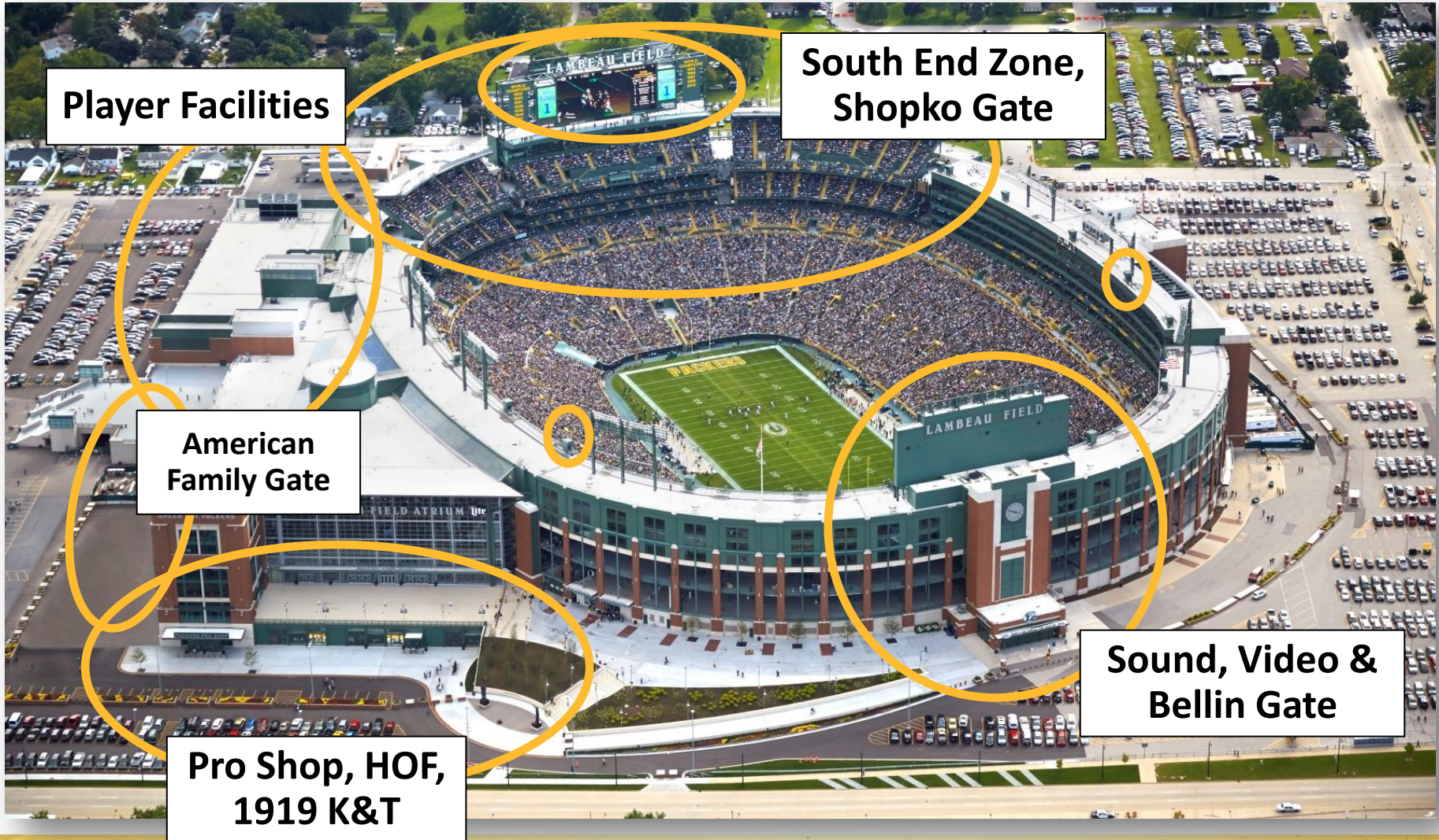
Improving the Year-Round Experience

- **Expanded Packers Pro Shop & Harlan Plaza (2014)**
- **Hall of Fame and 1919 Kitchen & Tap (2015)**

Investing in Player Facilities

- **Practice, conditioning, medical & recovery, dining**

Lambeau Field - 2015



Player Facilities

**South End Zone,
Shopko Gate**

**American
Family Gate**

**Pro Shop, HOF,
1919 K&T**

**Sound, Video &
Bellin Gate**

Construction Impact

Construction Dollars Spent in:

| | |
|----------------------------|--------------|
| Brown County | 46.6% |
| Northeast Wisconsin | 82.2% |
| Wisconsin | 96.3% |

One More Project

- **Premium & Event areas**
 - **170 suites, 240,000 SF**
- **\$55 million investment**
- **2016 & 2017 project**

Premium Customer Survey Responses

Suite:

Operable windows
Hot surfaces
Décor updates
Full size refrigerator
Smart TV
Hallway updates

Club:

High Top Tables/Chairs
Concession options
More TVs/video walls
Mobile device chargers
Décor updates

Operable Windows



Interior View – Existing Standard Suite



Interior View – Proposed Standard Suite



Interior View – Existing Standard Suite



Interior View – Proposed Standard Suite

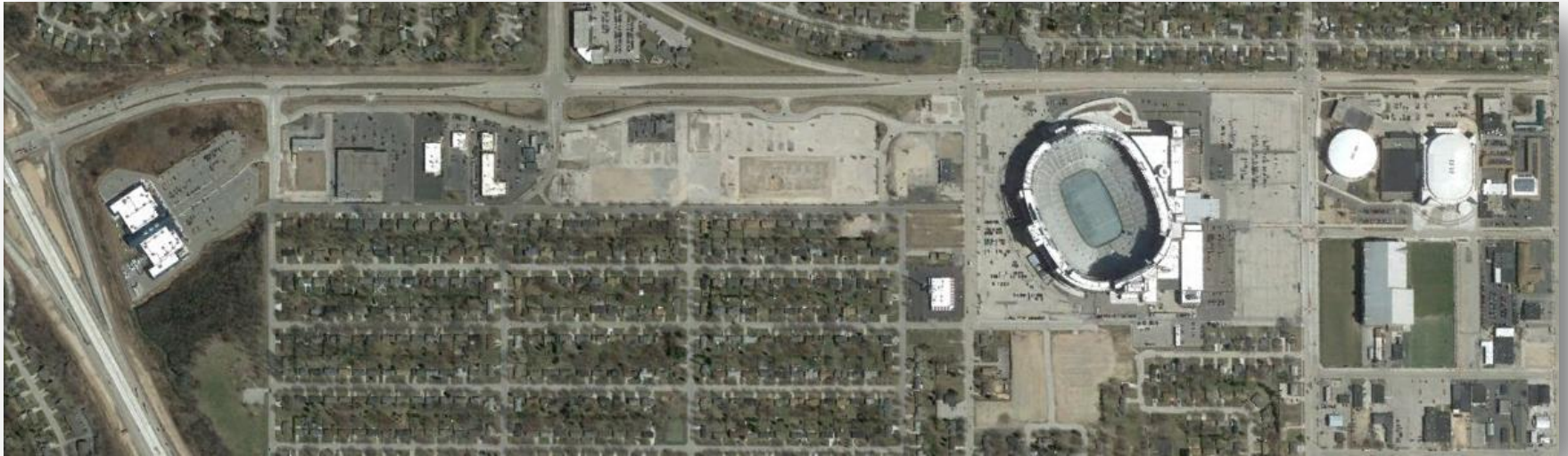


Titletown

An Investment in our Community



Future Development – Titletown District



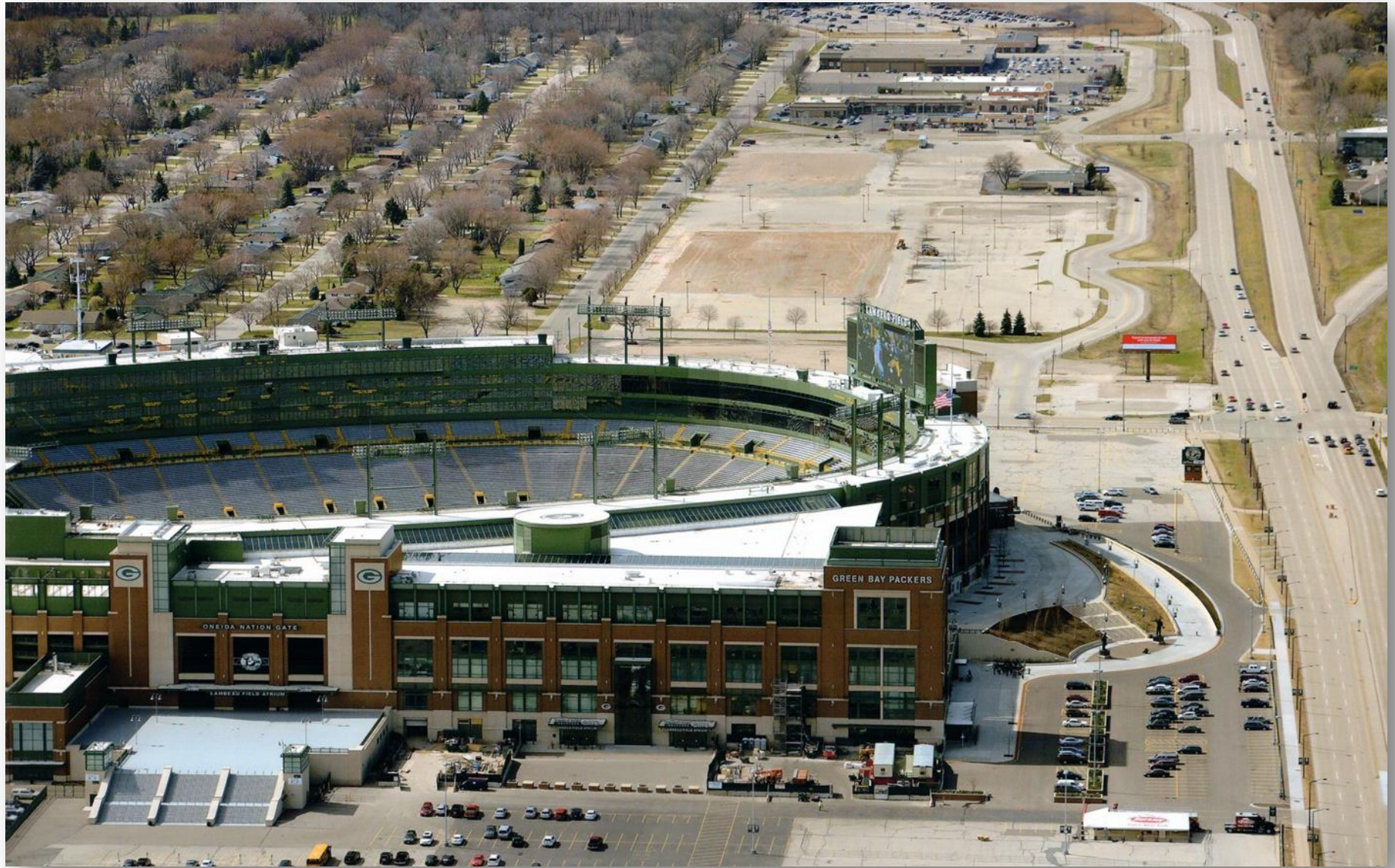
Titletown District - Objectives

- **Enhance the Green Bay Community by**
- **Transforming a 34 acre parcel into a retail, residential and recreational destination**
- **Ensure Packers remain in a financially sound position**

Titletown's 'Book End'

- **Cabela's (2013)**
 - **Economic Impact**





GREEN BAY PACKERS



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Titletown District

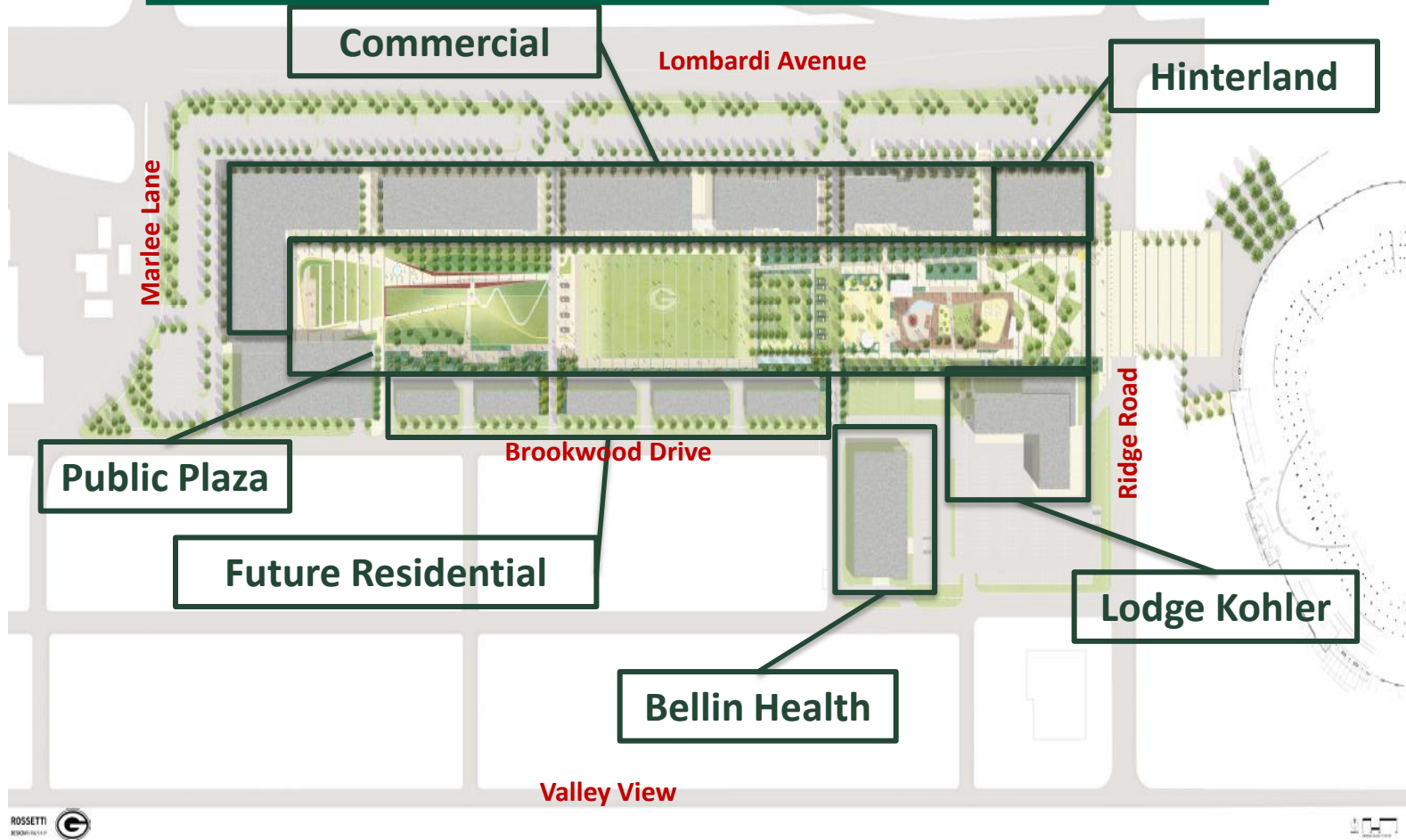
Develop a social and commercial amenity that:

- **Is unique in Green Bay**
- **Will help attract and retain talented young people and their families to move to and stay in the region**
- **Will attract visitors to the Titletown District**

Titletown District – Next Tenants

- **Lodge Kohler**
 - Luxury Four-Diamond hotel
 - Approximately 150 rooms
 - Indoor/outdoor garden pool, spa and fitness facility
- **Hinterland Restaurant and Brewery**
 - 20,000 sq. ft. fine dining restaurant and brewery
- **Bellin Health Sports Medicine Clinic**
 - Injury prevention
 - Performance Improvement
 - Treatment and therapy for injuries

Titletown District Site Plan



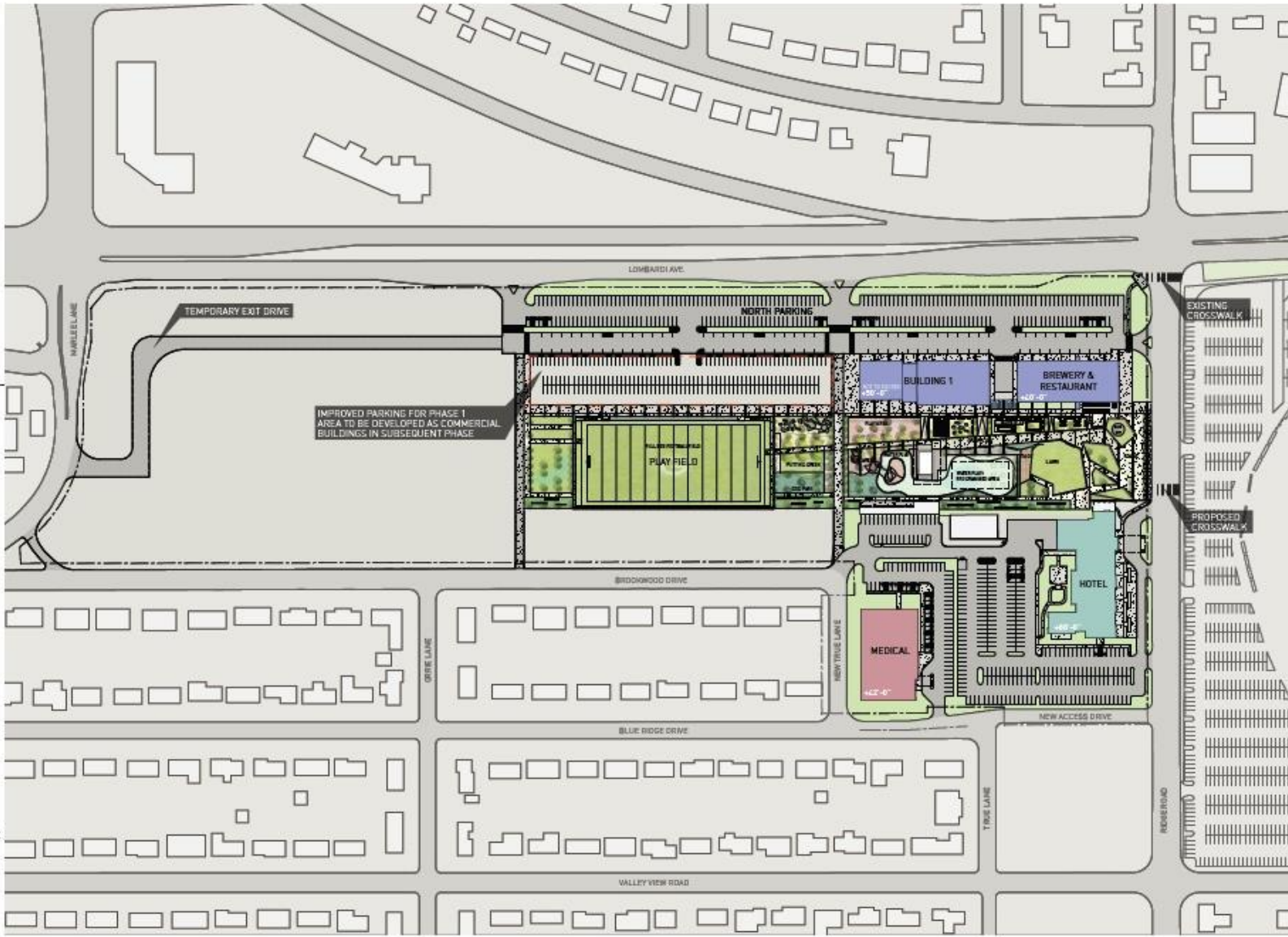
Plaza Program, Amenity & Event Ideas

- Interactive art
- Playfields
- Yoga – year round
- Library satellite
- Interactive water feature
- Food trucks
- Ethnic festivals
- Packer Alumni days
- Agricultural festivals
- Fire pits and bonfires
- Sledding hill
- Pond hockey
- Pickle ball
- Polka dancing/music
- Kubb
- German Biergarten
- BBQ competition
- Local, artisan vendors
- Performance stage/amphitheater
- Dog friendly
- Walking tours
- Language classes
- Lawn games
- Field goal kick
- Rock climbing
- Incorporate local history
- Speaker series
- Playground
- Village band concerts
- Sheepshead
- Ballroom dancing
- Badminton
- Winter festival
- Model train display
- Botanical gardens teaser
- Food trucks
- Bike infrastructure
- Soap box derby
- Cheese festival
- Family restrooms
- Curling
- Marathon post-run party
- Minor league baseball
- Remote control boats
- Nutrition programs
- Cribbage
- Artisan coffee kiosk
- Easter egg hunt
- TED talks
- Rugby
- Holiday lighting
- Outdoor dedicated screen
- Strong Wifi and outlets
- Urban vegetable garden
- Lumber jack days
- Oktoberfest
- Gallery nights
- Film festival
- Broomball
- Horseshoes
- Gaga
- Roller-skates
- Pinochle
- Bocce
- Croquet
- Chess
- Shuffleboard
- Lawn Yahtzee
- Trivia nights
- Giant puzzles
- Native American programming
- Sports simulcasts
- Beach volleyball
- Vinyl record station
- Programs for teens
- Summer concert series
- Scavenger hunts
- Spinning rides for kids

DEVELOPMENT ACREAGE PHASE 1

- Hotel Development**
3.88 Acres
- Medical Development**
1.54 Acres
- Brewery & Restaurant Development**
0.39 Acres
- Building 1 Development**
0.95 Acres
- Titletown Plaza**
6.03 Acres
- Phase 1 Parking & Drives**
8.18 Acres

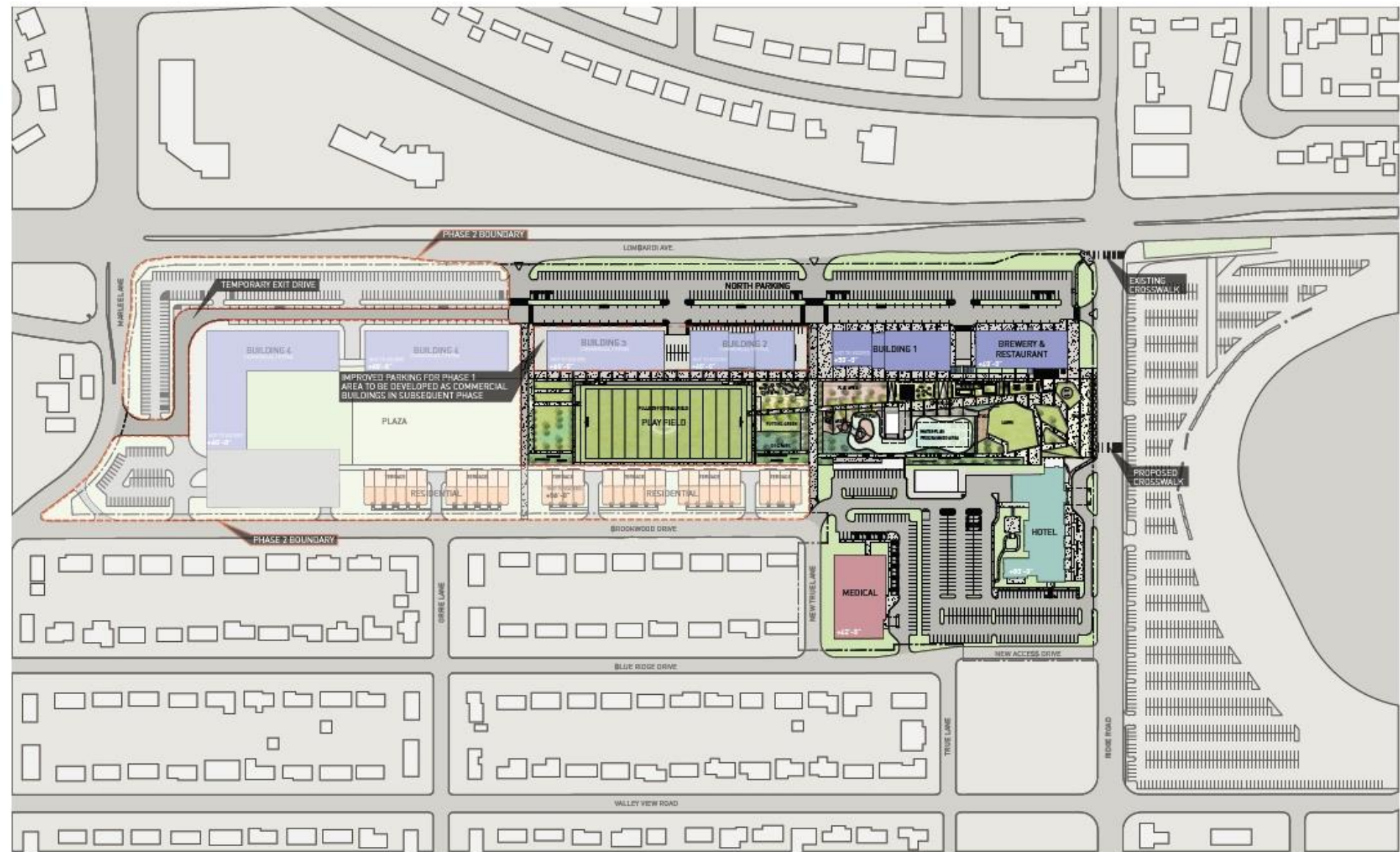
- Total Phase 1 Development**
20.97 Acres
- Undeveloped Area**
13.73 Acres



DEVELOPMENT PARKING ON SITE

- Hotel**
229 Spaces
- Medical Clinic**
91 Spaces
- North Lot**
331 Spaces
- Phase 1 Improved Lot**
191 Spaces
- Total Parking onsite for development**
842 Spaces





Titletown District Site Plan - Summer

SUMMER CONCEPT



Titletown District Site Plan - Winter

WINTER CONCEPT



GREEN BAY PACKERS



ROSSETTI
DESIGN GROUP



GREEN BAY PACKERS



ROSSETTI
DESIGN/ARCHITECT



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Thank You!