

NBA 2020-21 MARKETING & PARTNERSHIPS ANNUAL REPORT

SPONSORUNITED



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2020-21 SEASON TAKEAWAYS



Select categories continue to drive business.

The top seven partnership categories account for over half of all NBA team partnership revenue.



Finance is popular, fragmented and complex to carve out.

The top 3 most searched categories by NBA teams were in Finance (Banking, Crypto and FinTech).



TV Signage and digital became very popular and crowded.

21.3% increase in brands getting TV-visible signage exposure alone.



Brands are driving innovation in content and experiences.

Verizon 5G introducing new Ultra Wideband connectivity to bring players & fans together.



Players are rapidly broadening exposure and opportunity for brands.

Average NBA Player social media engagement per post is 5.25X average NBA team social media engagement per post.





CATEGORIES





CATEGORY REVENUE - TEAMS

SPONSORUNITED PRICING REPORT (SUPR) ESTIMATED DATA*

	TOTAL	AVG. PER TEAM
1 Finance	\$121,380,000	\$4,046,000
2 Technology	\$81,600,000	\$2,720,000
3 Healthcare	\$67,320,000	\$2,244,000
4 Telecom	\$56,100,000	\$1,870,000
5 Auto Manufacturer	\$39,200,000	\$1,306,667
6 Gaming	\$37,740,000	\$1,258,000
7 Insurance - Auto/Property	\$34,935,000	\$1,164,500
8 Non-Alcoholic	\$29,870,000	\$986,000
9 Beer	\$29,580,000	\$995,667
10 Retail	\$25,350,000	\$845,000
11 Professional Services	\$22,440,000	\$748,000
12 Wine & Spirits	\$20,400,000	\$680,000
13 Grocery	\$20,085,000	\$669,500
14 Health/Wellness/Grooming	\$19,890,000	\$663,000
15 Aftermarket	\$19,380,000	\$646,000
16 Utilities/Energy	\$18,870,000	\$629,000
17 Consumer Packaged Goods	\$18,620,000	\$620,667
18 QSR	\$18,360,000	\$612,000
19 Airline	\$17,360,400	\$578,680
20 Apparel & Accessories	\$15,600,000	\$520,000

THE CATEGORIES

RANKED BY TOTAL DEALS WITHIN CATEGORY

Alcohol

242

Apparel

152

Auto

146

Financial

129

Insurance

115

Technology

109

Healthcare

104

Non-Alcoholic Beverage

102

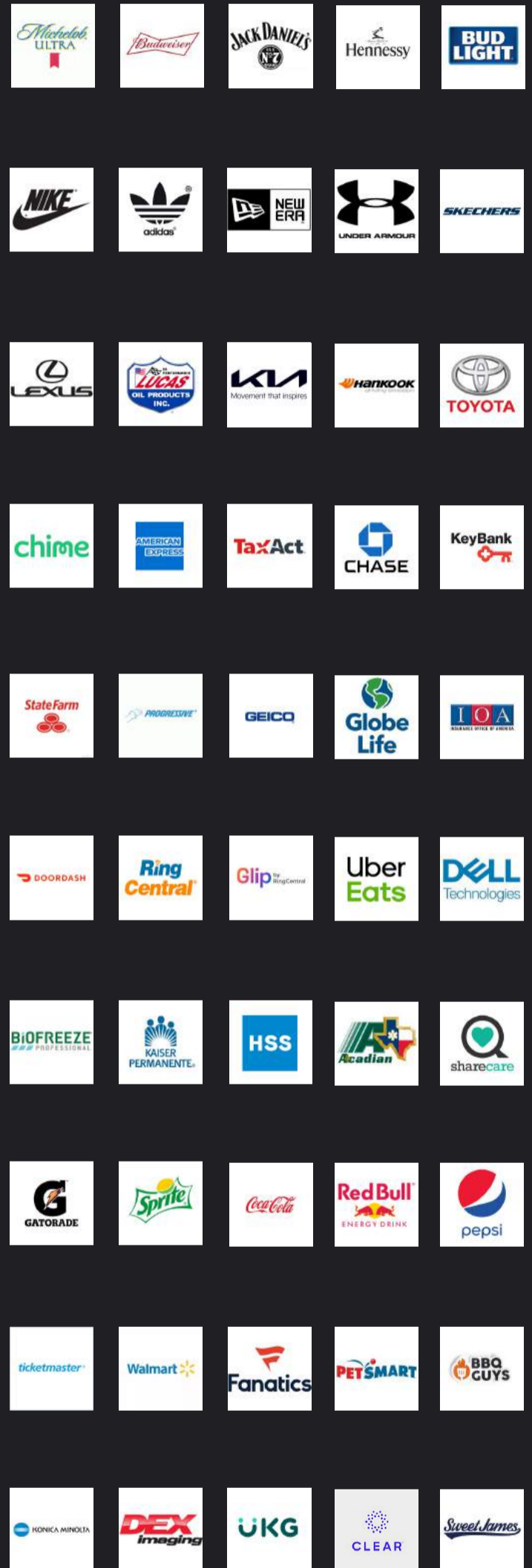
Retail

91

Commercial Services

89

MOST ACTIVE BRANDS



The #1 subcategory within Alcohol is **Beer (Import & Domestic)** with 105 total sponsorship deals in the NBA.

Michelob Ultra has a league deal in this while having 27 total NBA deals.

52 Average sub-categories sold per team

The #2 subcategory within Alcohol is **Spirits (Bourbon & Whiskey)** with 31 total sponsorship deals in the NBA.

#3 **Spirits (Multi-Line)**, #4 **Craft Beer**, #5 **Spirits (Vodka)**

\$557K Average revenue per team, per sub-category sold

EXPANDING CATEGORIES

LARGEST INCREASE IN DEALS YEAR OVER YEAR

#1 Betting Services

\$11.1M Estimated total revenue

2.2 Brands buying media or sponsorship per team

42% of teams have a partner in this category



PointsBet X Bulls



BetRivers.com X 76ers

#2 On-Demand Delivery

10 Active brands within the NBA

100% Increase in teams with sponsorship deal (16% to 32%) YoY

133% Increase in avg. unique assets bought YoY



DoorDash X Heat



Uber Eats X Raptors

#3 Banking

64 Brands buying against sponsorship & media

\$2.9M Avg. NBA Bank Deal

43% Of deals are exclusive or single deal



KeyBank X Pacers



Chime X Mavericks

#4 Auto Aftermarket

77% Of teams have a deal within this category

\$17M Estimated total revenue

3 Average brands per property



Duralast X Grizzlies



Lucas Oil X Spurs

#5 Household Supplies

16 Total brands across sponsorship and media

\$11M Estimated total revenue

85% Of partnerships are exclusive for the team's subcategory



Clorox X NBA



Libman X Timberwolves

BRANDS

5G^v Performance Center

THE VOYAGER

5G Performance Center

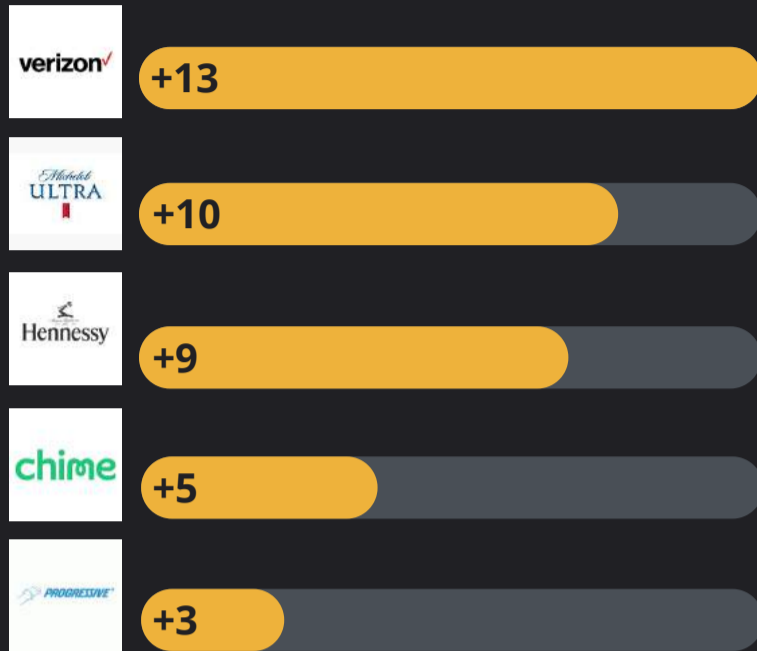
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EXPANDING BRANDS

INCREASE IN DEALS YEAR OVER YEAR

Sponsorship



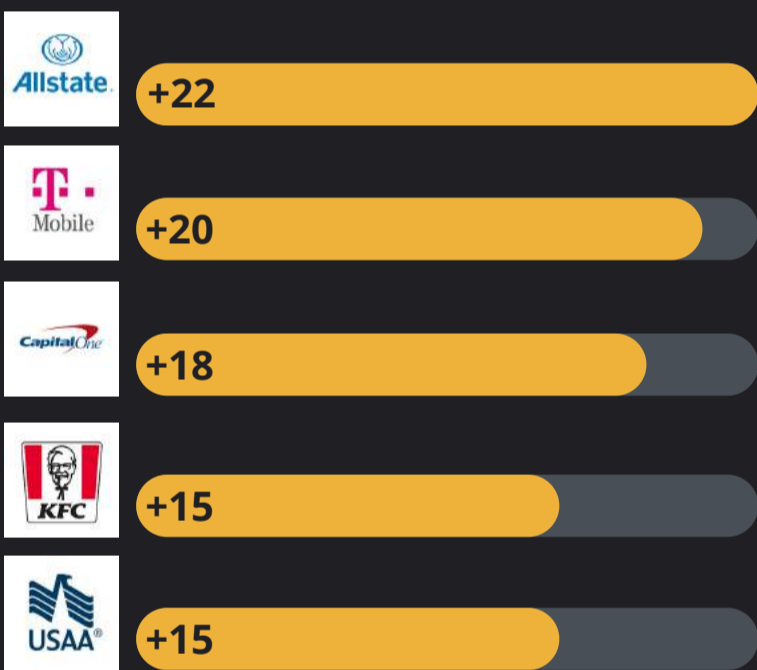
Verizon has deals with **15 NBA** teams to enhance games by delivering stats and real-time info directly to fans with 5G Ultra Wideband.

Already a league partner, **Michelob Ultra** added individual teams to create custom engagement for fans with virtual, in-stadium experiences.



Verizon X Suns

Television



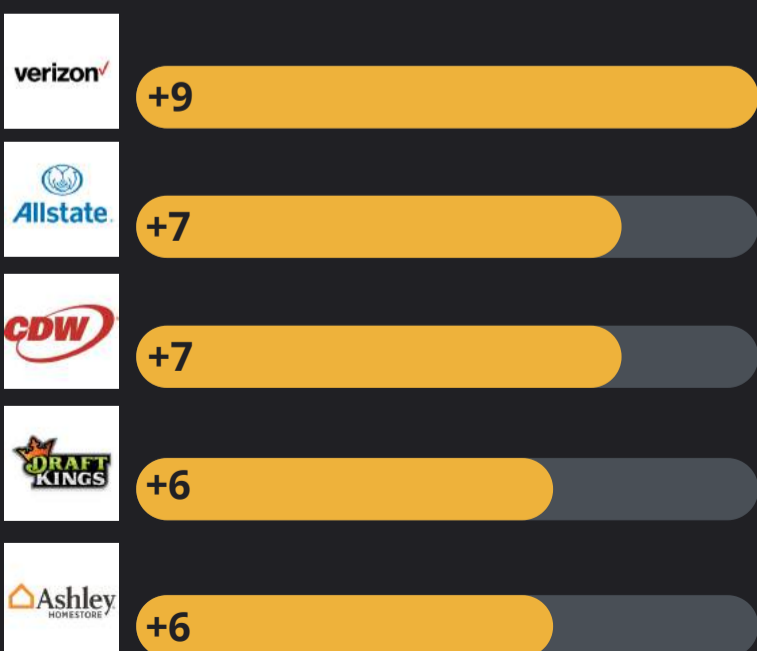
T-Mobile has a deal with **27 NBA** teams with a total of 79 TV assets, up from 11 in the 2019-2020 NBA season.

Allstate has a deal with **23 NBA** teams with a total of 39 TV assets, up from 1 in the 2019-2020 NBA season.



T-Mobile X Celtics

Radio



Verizon has a radio partnership with **16 NBA** teams, up from 7 teams in the 2019-2020 NBA season.

Allstate has a radio partnership with **9 NBA** teams, up from 2 teams in the 2019-2020 NBA season.

CDW expanded radio partnerships to **7 NBA** teams, up from 0 teams in the 2019-2020 NBA season.

DraftKings has a radio partnership with **7 NBA** teams, up from 1 team in the 2019-2020 NBA season.

PROMINENT LEAGUE PARTNERS

SNAPSHOT OF MAJOR BRANDS INVESTING IN THE NBA



52%

Of **Kia's** total sponsorship assets across all properties are with the NBA



17%

Of **State Farm's** total sponsorship assets across all properties are with the NBA



23%

Of **Mountain Dew's** total sponsor assets across all deals are with the NBA



All-Star MVP Sponsored Award



Basket Stanchion: Arm



3-Point Contest with Logo on Trophy



69%

Of **Hennessy's** total sponsorship deals across all properties are within the NBA



19%

Of **Fanduel's** total sponsorship deals across all properties are within the NBA



7

NBA teams AT&T has a sponsorship deal with including the NBA league.



Official Spirit of the NBA



Pregame Show Naming Rights



AT&T Baseline Apron



27

NBA teams Gatorade has a sponsorship deal with including the NBA league.



16%

Of **Michelob Ultra's** total sponsorship deals across all properties are within the NBA.

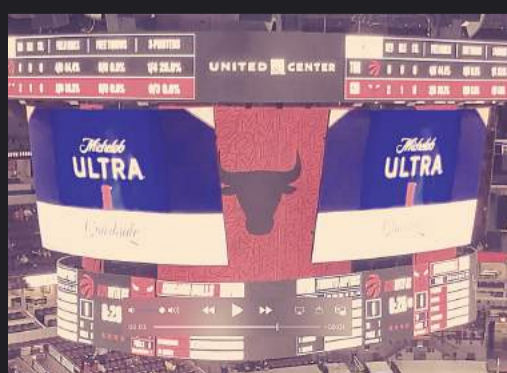


27

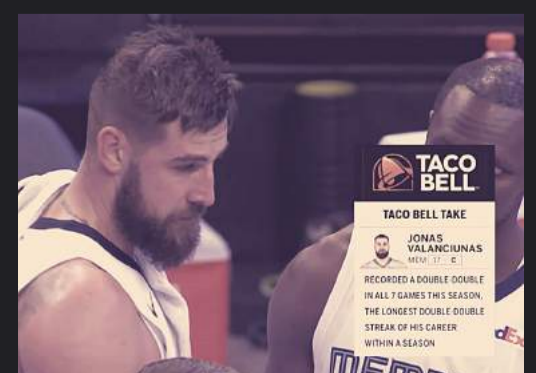
NBA teams Taco Bell has a TV partnership with.



Product Placement



Event Related Content



Featured Segment "Taco Bell Take"

NEWCOMER BRANDS

NEW OFFICIAL PARTNERS OF THE NBA

ACTIVATIONS



Previously, Carmax has had deals with West Coast NBA teams but made a national push to gain brand awareness.



First Online Travel Site Partner. Expedia Group has multiple brands to integrate with the NBA's fast growing global DNA/audience.



Community-driven partnership to grow the NBA's participation among young athletes and improve facilities nationwide.



The NBA and Oreo have introduced a "Taste of Greatness" sweepstakes with a chance for fans to win a trip to the NBA All-Star Game in 2022.



Culturally impactful approach as the NBA All-Star Game will exclusively provide product collaborations for players and fans.



After signing on with the NHL, Bally Sports built a relationship with the NBA to pursue larger market share.



Global reach initiative to commemorate the 75th season of the NBA. Previously a partner for the league's first 37 years.



The NBA has utilized Clear's Health Pass technology for COVID-19 health screening in arenas.



The NBA will exclusively use Microsoft's Surface products as well as Microsoft's Azure platform to broadcast live and on-demand games.



This partnership was facilitated by Infront Media focused on growing NBA's footprint in Italy and San Carlo's commitment to healthy living.



NBA's continued expansion into Brazil was strengthened with food brand Sadia's new programs, "Team Sadia" and "Romulo Sunday Nuggets."



NBA's first deal in the smart mobility products category, Italy's push for children to remain active. Another deal facilitated with Infront.



With the rise in popularity of in-play, prop and parlay bets, access to official, real-time NBA data feeds, league marks and logos positions IGT create highly compelling betting menus for sports fans across the country.



Intesa Sanpaolo is now the exclusive retail banking partner of the NBA in Italy, which follows their acquisition of UBI Banca, who held the partnership previously.



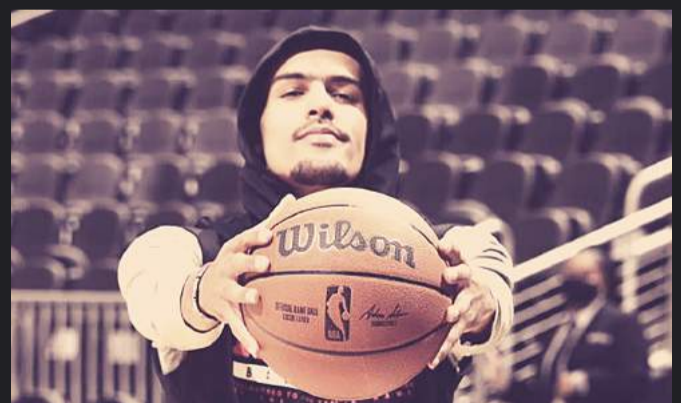
Baseline Apron - CarMax



Logo on Backboard Glass - Hotels.com



Cause Related "Buy a Bar, Build a Court" - The Hershey Company



Official Ball of the NBA - Wilson



Official Licensee - Canada Goose



TRENDS

PARTNERSHIP TRENDS

The Team Rankings

Most Partners



Most Exclusive

Assets w/ highest increase in usage

Logo on Sideline surface

55% YOY increase in total brands from 2019-20



Nets X FanDuel

Stanchion Pole Pad logo

46% YOY increase in total brands from 2019-20



Bucks X Coors Light

Baseline Apron Digital ads

34% YOY increase in total brands from 2019-20



Celtics X Vistaprint

Most Searched Categories by Teams

#1

FinTech

- 2 Bitcoin/Crypto
- 3 Banking
- 4 Grooming/Toiletry
- 5 Betting Services
- 6 eCommerce
- 7 On-Demand Delivery
- 8 Software
- 9 Financial Services
- 10 Audio/Visual/Wearables

Most Searched Brands by Teams

- 1 HYPERICE
- 2 goPuff
- 3 Therabody
- 4 DOORDASH
- 5 crypto.com
- 6 betway
- 7 coinbase
- 8 indeed
- 9 CRAFT KINGS
- 10 V/W

JERSEY PATCH

JERSEY PATCH BREAKDOWN

25%

of deals are with financial institutions (# 1 Category)

24.7

Average assets in each jersey patch deal

67%

of brands headquartered team's home market

53

Average age of company buying jersey patch

Other assets bundled into deal

Social Posts (FB TW IG, LI)

96%

Courtside Apron (Rotating Billboard)

93%

Website (banner/content Integration)

89%

Basket Stanchion (Signage)

81%

Baseline Apron (Rotating Billboard)

78%

Type of Brand

Challenger (#2-6 in market share rank)

35%

Leader (#1 in market share rank)

27%

Disruptor (<#7 rank in market share rank)

27%

Regional (no national/global brand reach)

12%

7 of 10

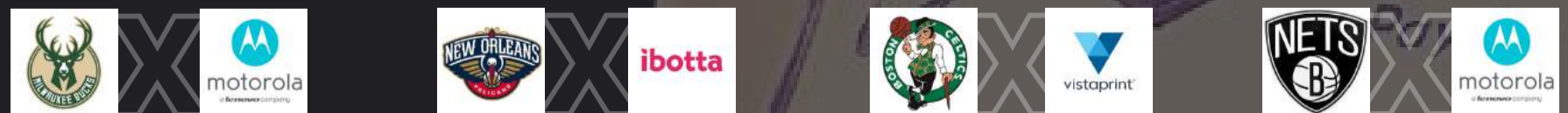
brands had a prior deal with team before jersey patch

42%

of partners share at least one common logo color

NEW DEALS

Primary Jersey Patch



Practice Jersey Patch





ENDORSEMENTS

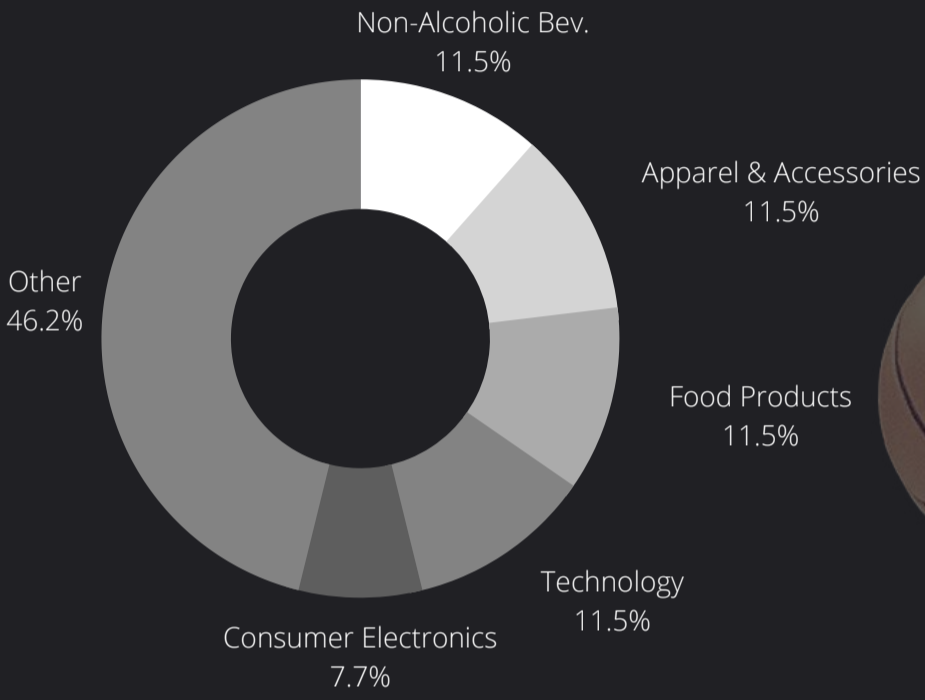
LEBRON JAMES

LOS ANGELES LAKERS

#1

Ranked athlete in the NBA
 in total deals with **26**

Category Breakdown



Note: "Other" accounts for 14 different categories each having one deal

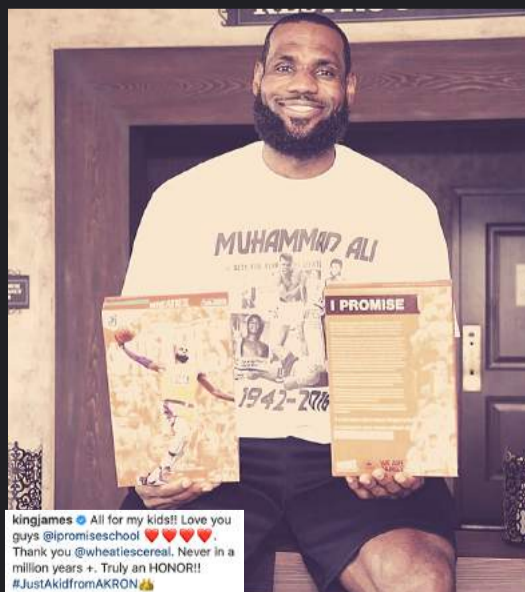
Notable Brands (Most Exposure)



Most engaged social posts



Mountain Dew
 Engagement: 2,617,752



Wheaties Cereal
 Engagement: 1,146,343

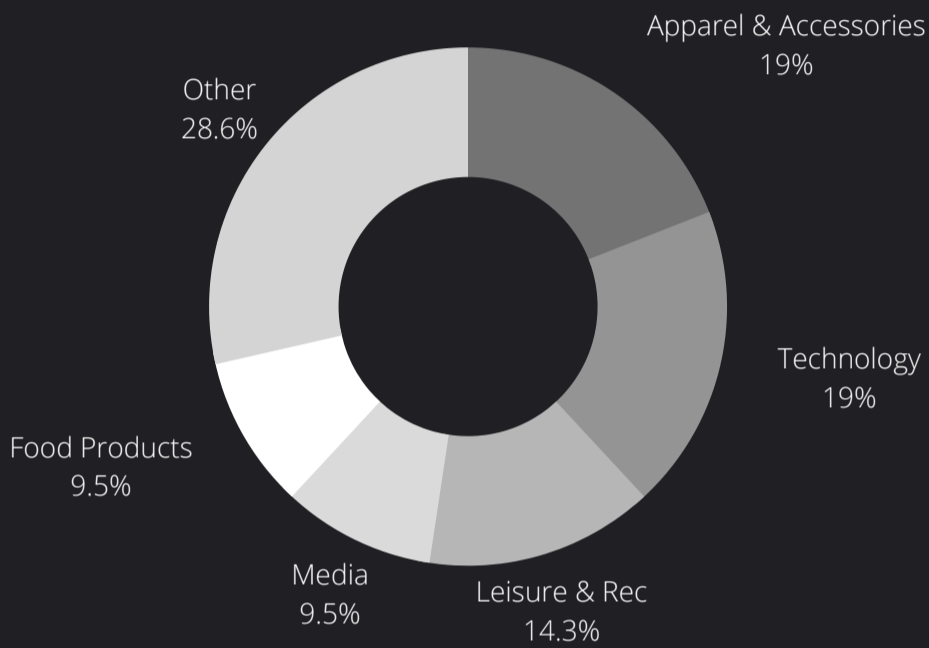
TRAE YOUNG

ATLANTA HAWKS

#2

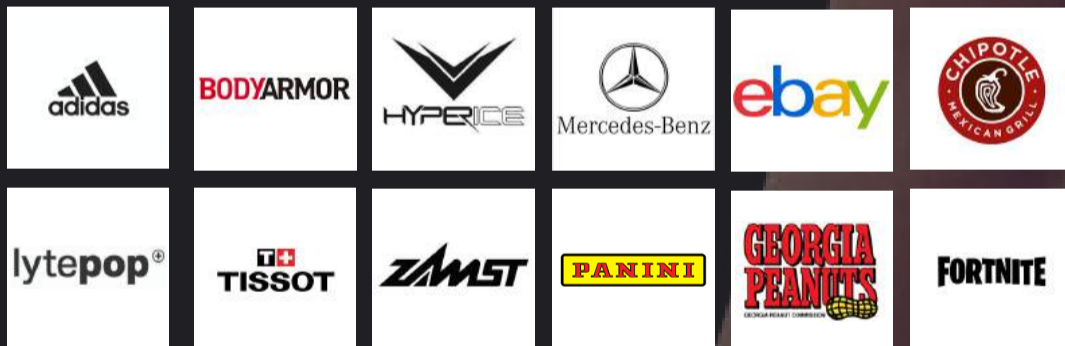
Ranked athlete in the NBA
 in total deals with **22**

Category Breakdown



Note: "Other" accounts for 6 different categories each having one deal

Notable Brands (Most Exposure)



Most engaged social posts



Zamst
 Engagement: 102,727



BodyArmor
 Engagement: 73,798

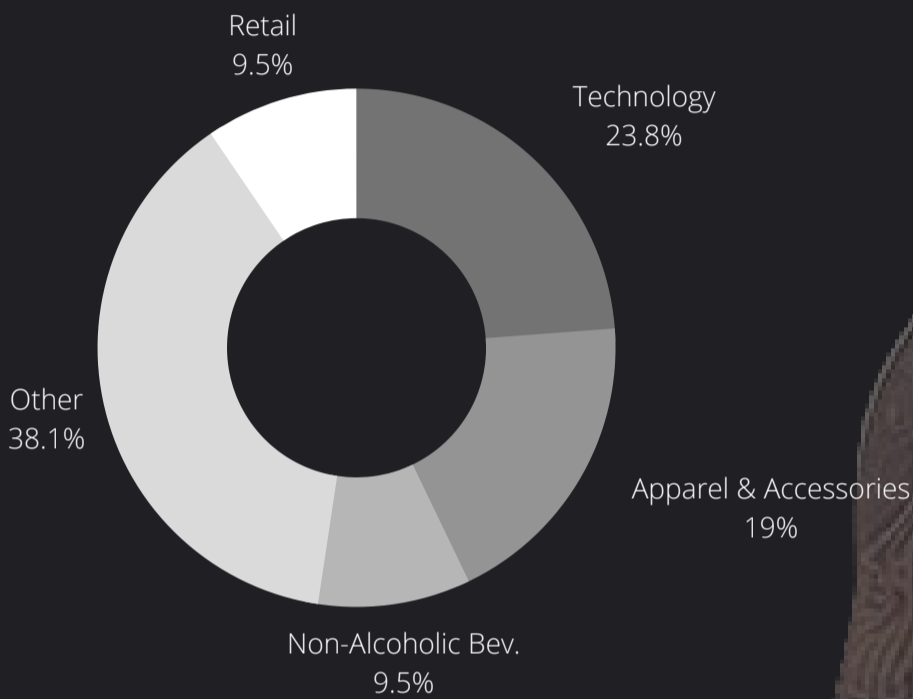
DAMIAN LILLARD

PORTLAND TRAILBLAZERS

#3

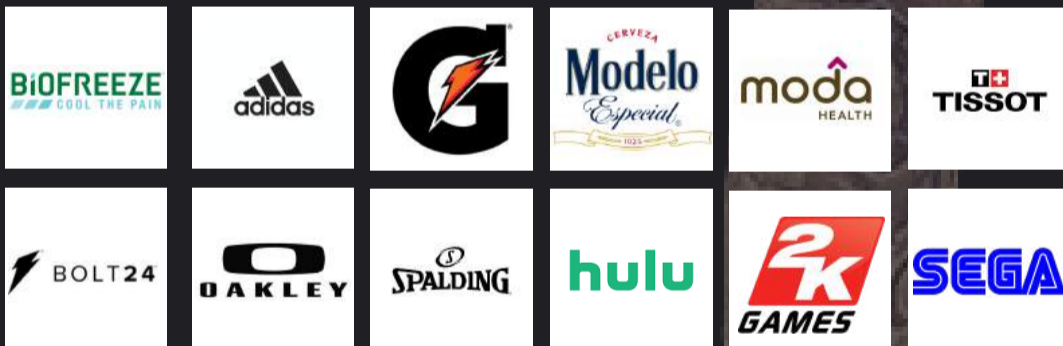
Ranked athlete in the NBA
 in total deals with **21**

Category Breakdown



Note: "Other" accounts for 8 different categories each having one deal

Notable Brands (Most Exposure)



Most engaged social posts



adidas
 Engagement: 402,799



adidas
 Engagement: 398,993

OTHER NOTABLE ATHLETES IN DEALS

RIISING STARS IN THE NBA

JA MORANT



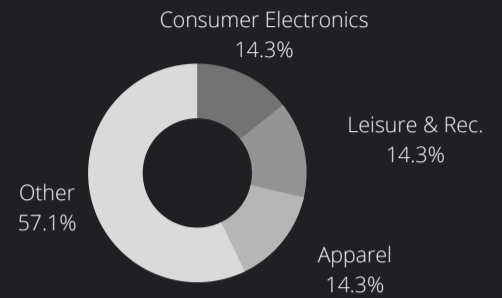
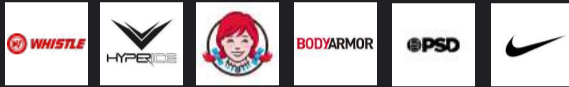
14

Total deals / brands worked with

11

Total categories partnered with

Notable Brands



Other includes: Technology, Retail, Transportation, Media, Consumer Products, Food Products, QSR, Non-Alcoholic Bev.

BEN SIMMONS



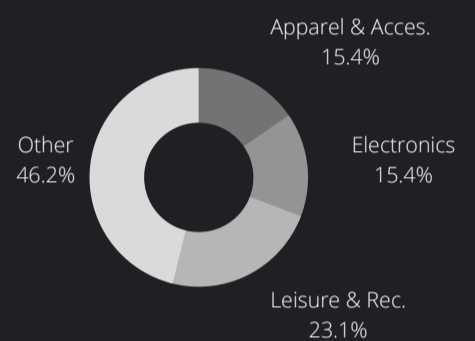
13

Total deals / brands worked with

9

Total categories partnered with

Notable Brands



Other includes: Technology, Media, Food Products, Hotel & Restaurant, Telecommunications, Non-Alcoholic Bev.

JAYSON TATUM



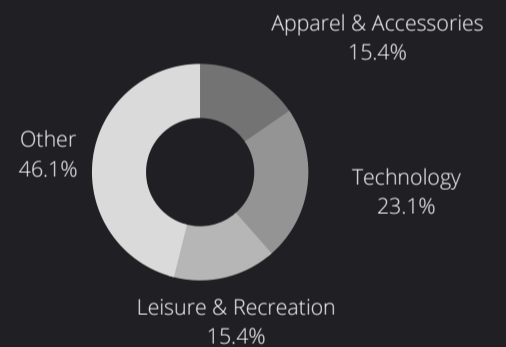
13

Total deals / brands worked with

9

Total categories partnered with

Notable Brands



Other includes: Beverage - Non-Alcoholic, Commercial & Professional Services, Financial, Food Products, Organizations & Groups, QSR

DONOVAN MITCHELL



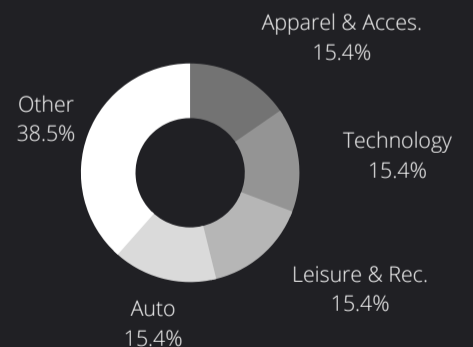
13

Total deals / brands worked with

9

Total categories partnered with

Notable Brands



Other includes: Media, Retail, Consumer Products, Telecommunications, Non-Alcoholic Bev.

ZION WILLIAMSON



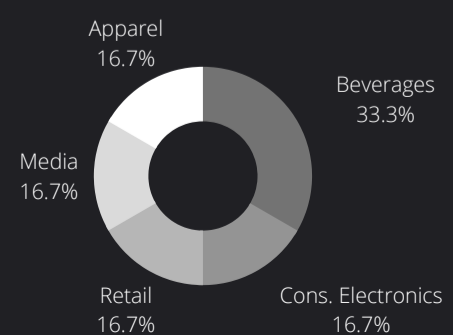
6

Total deals / brands worked with

5

Total categories partnered with

Notable Brands





SOCIAL

PROPERTY PERFORMANCE

COMPARATIVE ANALYSIS BETWEEN ATHLETES AND TEAMS

	PLAYERS	TEAMS
Total Branded Post Gross Engagement	48M	145M
Avg. Engagement Per Brand Post	21k	4k
Median Posts Per Brand Partner	1.5	33

BRAND PERFORMANCE

TEAM / PLAYER / LEAGUE

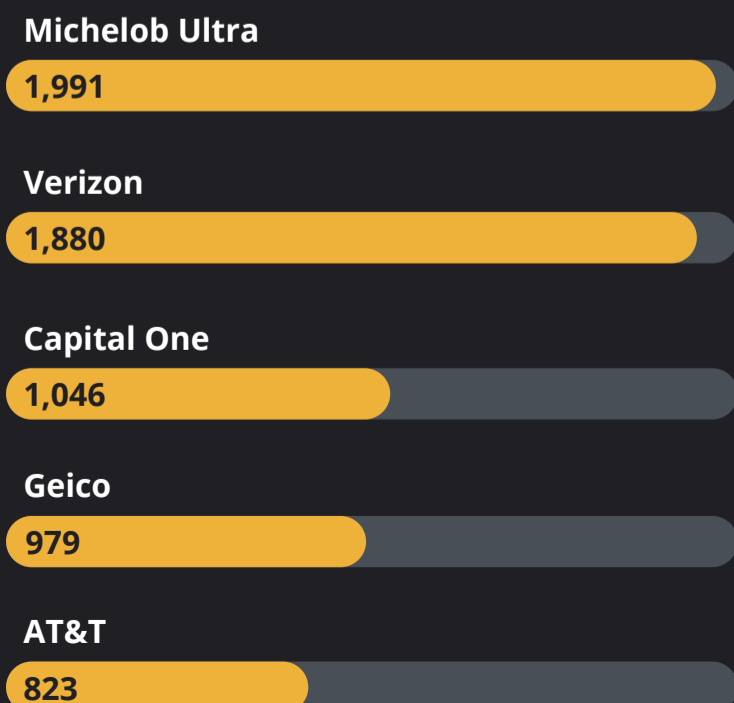
Highest average engagement per post

MINIMUM 20 UNIQUE POSTS

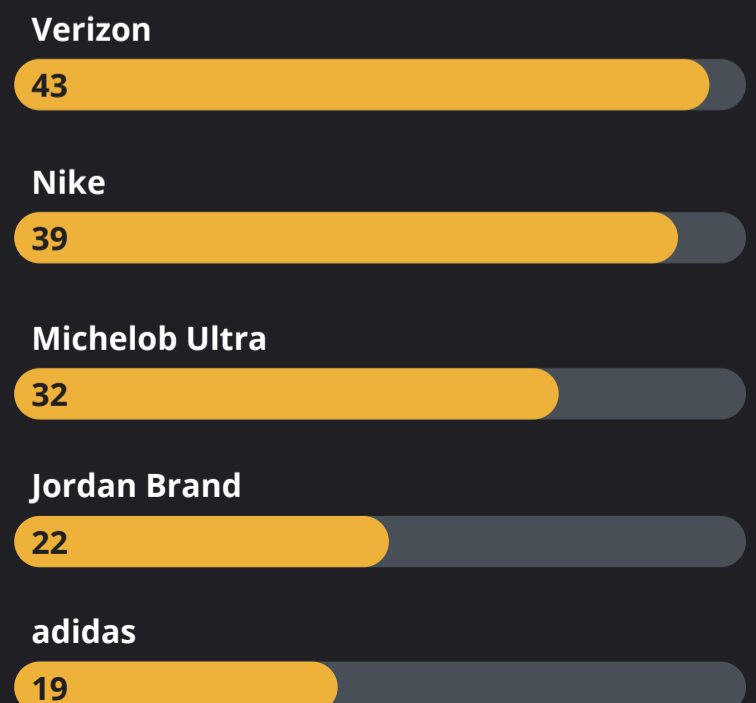


MOST ACTIVE BRANDS

Most Posts Per Brand



Most Team / Player Posts



SOCIAL FOLLOWER GROWTH

35.7M vs. **22.4M**

Total social growth of players vs. teams this season

8% vs. **1%**

Player+Team social growth on Instagram vs. Facebook this season

PLAYERS

Largest gain in gross followers

Largest % Increase in followers

1

Lebron James
+15.8M

2

Steph Curry
+4.1M

1

Immanuel Quickley
+116%

2


Jerami Grant
+52%

3

Kyrie Irving
+1.6M

4

Devin Booker
+1.2 M

3

Domantas Sabonis
+50%

4

Jaylen Brown
+50%

5

Russell Westbrook
+1.1M

6


Giannis Antetokounmpo
+1.0M

5

Khris Middleton
+41%

6

Jamal Murray
+41%


7

Trae Young
+970K

8

Jaylen Brown
+930K

7

Caris LeVert
+37%

8

Joe Harris
+37%

9

Markelle Fultz
+813K

10

Damian Lillard
+730K

9

Yuta Watanabe
+37%


10


Delon Wright
+36%


TEAMS


Largest gain in gross followers


Largest % Increase in followers



+2.4M



1.8M



1.5M



752K



585K



529K



+24%


13%


12%


11%


9%


8%

PLAYOFFS
JAZZ
28 UTAH JAZZ 23
ZIONS BANK

JAZZ ADVANCE

ROUND 1 1

PLAYOFFS

vivint arena

Utah

Jazz

Take Note

VENUE



PRE & POST COVID SHIFT

+21.3%

Growth in brands buying TV-Visible signage from 18-19 to 20-21 season (20.7 vs 25.1 brands per team)

771

Total Brands buying TV-Visible signage in 2020-21

+83.3%

Increase in alcohol category buying TV-Visible signage since 2018-19 (6% share to 11% share of signage)

MOST ACTIVE BRANDS

TV Visible Signage

Premium Area Entitlements

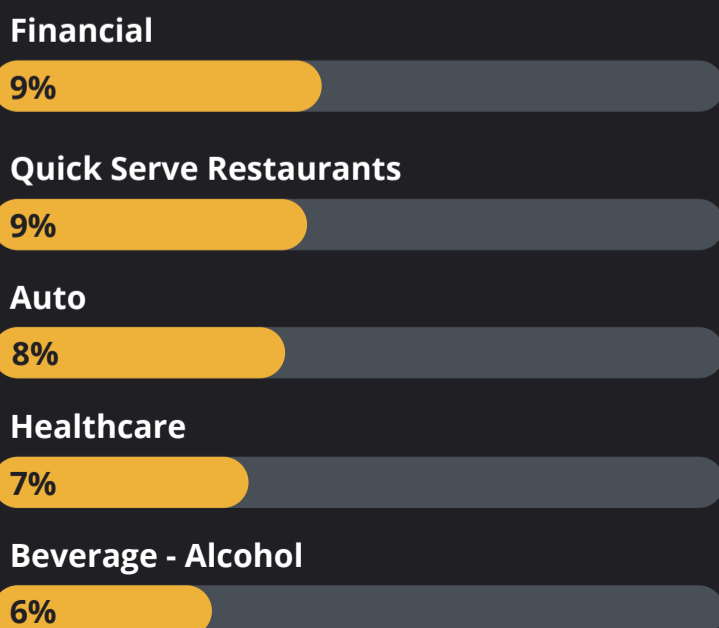
On-Site Content & Activation

Vendor Products & Services



MOST ACTIVE CATEGORIES

Video Board Sponsored Content



Virtual / Project Signage

