

Data-Driven

Sponsorship

from **Sports Innovation Lab**

Next-Gen Sponsorship Leadership Board

September 2020



My Dream For The Sponsorship Ecosystem

When I was 9 years old, I dreamed of playing in the Olympics. I dreamed this at a time when there was no Olympics for my sport. To do great things in life, you have to dream larger than life and create a vision for something that might not seem possible. This report does just that for sports sponsorship.

Since my earliest days as a player, I understood the role of sponsorship in sport. Brands, and their enormous marketing budgets, fueled media production, stadium development, and athlete training. Not much has changed since I was an Olympic athlete. Brands still pay for media rights, buy signage, and activate in live venues to reach sports fans.

For brands, the sponsorship model makes sense. If your goal is to build brand awareness and brand affinity, it's hard to find a better channel than sports. Few other forms of entertainment command the same attention as sports. Few other forms of entertainment draw the same audience size as sports. And, few other forms of entertainment elicit the same loyalty and devotion from the consumers brands wish to target: the fan.

But, in the New Age of Sports, where Fluid Fans are expecting more, and their relationship to brands and sports properties are changing, simple brand association with a team or player may not be enough to support sponsor spend anymore. Fans are no longer blindly accepting superficial associations between brands and their favorite teams or players—they expect value, authenticity, and personalization. Being the "official widget" of a sports team, or throwing your logo on a placard or uniform may get brand visibility, but there is growing anxiety from the buyers that the visibility is simply not enough. Complicating the equation further is the fact that measurement is hard for rights holders and the true value is unknown. Furthermore, consumers are now savvier about how and what they buy. With so much available information, rudimentary brand association is flimsy. Don't expect a fan to buy your widgets, just because you have an



official partnership: **fans need to care about your brand and believe that what your product offers is authentic and aligns with their values.**

For these reasons and more, brands are increasingly looking to more focused efforts that boast better returns on their marketing investment. Brands want to be able to target their market, not spam millions of distracted eyeballs on a broadcast. They want to be positively integrated with experiences that consumers crave, not blindly activate. Importantly, brands want to close the gap between messaging and action, and bridge the distance between marketing and transactions. This is something that digital marketing does for these brands on social media and through ecommerce: brands now want sponsorship to offer similar guarantees.



Fans are no longer blindly accepting superficial associations between brands and their favorite teams or players—they expect value, authenticity, and personalization.

The technology that unlocks this kind of consumer reach, engagement, and behavior is here. It's available to those who buy, sell, and build sport sponsorships. The gap between what's possible and what gets done is only bridged by our collective ambition to improve the way we do things as an industry. We need to stop selling static sponsorship inventory because "that's what we've always done" and start forming new partnerships that connect deeper with fans through new products and services. We need to build platforms. We call this technologically data-driven approach to sponsorship: **"Next-Gen Sponsorship."**

In this report we outline a new way of thinking about how sports properties' partner relationships are defined. We outline three modes of sponsorship that will help organizations from across the ecosystem to buy and sell better, all fueled by data and technology. At the heart of this framework are Fluid Fan Behaviors, the motivational expectations that Fluid Fans demand from sports. The result of embracing this approach to sponsorship means you're up front and clear on what value partners get and how to share data and assets in the pursuit of longer-term partnerships.

Change is not easy. Innovation is harder. Only the boldest leaders and organizations are able to take the leap to disrupt the current sponsorship model. With a data-driven sponsorship approach, evolve and leave the industry better than how you found it.



Angela Ruggiero

CEO & Co-Founder

Sports Innovation Lab

All the Glitz

None of the Data

Experts in the sports sponsorship space know it's true. Agencies and marketers who deliver some of the most innovative brand activations in sport know it's true. The sports industry puts on a hell of a show—thrilling live entertainment with expensive and mind blowing sponsorship activations, but the industry is still flying blind. Despite the fact that brands pour billions each year into sports sponsorship, the industry still lacks an efficient way to capture data about who Fluid Fans are and what they want.

While sports organizations struggle to build CRM systems, Facebook, Twitter, YouTube, TikTok, and other digital platforms know exactly who sports fans are and can predict what fans want to watch, who they want to talk trash with, and when they are primed to buy a jersey. They know everything about consumers because their media platforms are designed to capture data about what behaviors consumers do and when they do them.

It's time sponsorship investments work harder and smarter to put properties and brands in a stronger position to personalize the sports experience and deliver breakthrough fan experiences. As sponsors are one of the best channel partners of every sports property, and through their sponsorship activation spend (equivalent to roughly 2-3X the cost of acquiring those rights), brands provide the best possible platform to reach Fluid Fans on behalf of the brand and rights holder. Data is the key to this opportunity, and



“Our goal is to work with our sports partners to leave a positive legacy and impact on their events. We’re going to have to manage smaller and more targeted activations—and that’s not bad thing. In the end, we’ll all benefit from operating smarter.”

Mike Reed

VP of Olympic & Sports Solutions, The DOW Chemical Co.

sponsorship activations can help acquire this data. With digital and mobile elements added to traditional sponsorship activations, sports organizations and their partners can acquire and accumulate more meaningful fan data than simple email, mailing address, and purchase history. The number one question we get at Sports Innovation Lab is, "How do we find out *who* our fans are?"

This is a big shift for the industry. To get there, new endemics¹—the kind of technology partners that specialize in building cloud and mobile solutions, will take more active roles in sports sponsorship. These technology specialists will sign longer term deals and co-develop solutions optimized to capture and analyze the preferences and behaviors of sports fans.

The industry doesn't need to start making sports sponsorship more digital to "keep up". Digital is simply a survival strategy and the minimum requirement in today's environment. In the New Age of Sport, attention and future attention of fans depends on knowing what fans want and creating a hyper-personalized experience for them. Sponsorship can help unlock this knowledge. It's time to get to work.




"We want to give people a reason to think about and feel like we understand why they're fans and to make them feel like we're trying to enhance the fan experience. And then obviously that they're getting something by using their Mastercard that they might otherwise not. So at all those payment touchpoints they're thinking of it."

Michael Goldstein

VP - Head of Sponsorships North America, Mastercard

During the Sports Innovation Lab "Ask Me Anything"

July 30, 2020: <https://www.sportsilab.com/ama-series>



Ready For A Change

It's easy to find examples of sports properties and brands doing things the old fashioned way—selling signage, naming rights, and entitlements. It's harder to see examples of what the future of sponsorship could look like. To see into the future, Sports Innovation Lab brought together experts from across the industry to paint the picture of how things are done today and what needs to happen to put the industry on more solid footing. The experts on our Next Generation Sponsorship Leadership Board identified three trends that are pushing on traditional sponsorship models: [Off-The Field Causes](#), [Digital Agility](#), and [Disposable Inventory](#).

→ Off-The-Field Causes Matter More

Before and after sports events, fans want to hear from the brands they trust and who support the athletes they love. These controversial sponsorship positions define authenticity because Fluid Fans follow their values and are more likely to align with rights holders and brands that reflect who they are. They force brands to take a stand and fans reward brands for doing this well.



"We are really excited about our Athlete Causes Platform where we have helped line up every player with a cause they care about. As a startup league, to be able to build and incorporate charitable giving and cause related marketing right off the bat was critical."

Jon Patricof

CEO & Co-Founder, Athletes Unlimited



"One thing that's come out very strongly throughout every wave of the analysis that we've done since the pandemic began is the role of the sports property holder and rights holder and the way they conduct themselves around COVID and social issues. The importance of cause related marketing initiatives and the importance of safety first and people first."

Jon Stainer

Managing Director of Americas, Nielsen Sports

*During the Sports Innovation Lab "Ask Me Anything"
August 13, 2020: <https://www.sportsilab.com/ama-series>*



Cause marketing and social responsibility platforms have gone from seventh or eighth on a list of brand activation and engagement to first or second. They will no longer be an add on, they will be a must have and there will be an ROI attached. It won't be 'just add this to our deal' at the end of a negotiation. It will be one of the first questions asked before discussions even begin, and that is a good thing."

Joe Favorito

**Lecturer and Sports Strategy Consultant,
Columbia University**

→ Digital Agility Favors Longer Term Deals

To move quickly and keep up with new apps and mobile devices, properties need technical support from their partners that goes beyond sponsorship dollars. This means longer term deals are preferred because technology vendors are more likely to provide real skills and tech support to the partnership instead of checking boxes on value-in-kind trade. There's lots of room now with emerging technologies like cloud, machine learning, and 5G to tell stories together. The smart sponsorship deals carve out these new endemic categories while establishing the platforms and skills to quickly evolve digital offerings.

Stepping Through a Co-Development

Process with

ROVER

1. A fan behavior/experience is identified with an initial Minimum Viable Product defined
2. Initial data is captured/gathered and the use case/behavior goes through a continuous iteration cycle where the data feeds new ideas and the behavior's evolution
3. The fan behavior becomes less of a one-time 'gimmick' and more of an experience that team & brand co-evolve together, amortizing fan engagement & sponsor value over months/years and avoiding the initial spike and crash of engagement numbers



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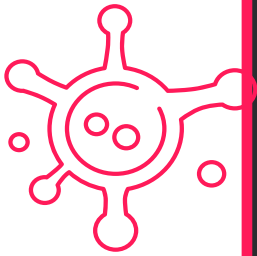
John Coombs

Co-Founder & CEO, Rover

*During the Sports Innovation Lab "Ask Me Anything"
June 11, 2020: <https://www.sportsilab.com/ama-series>*

→ **COVID-19 Exposed Disposable Inventory**

When the health crisis hit, static inventory and media buys got slashed. Make-good negotiations got tense, and "partnerships" unraveled. Those properties with longer term partnerships had more constructive conversations and survived the pause and postponement of live sports. Many of the short-term impression-based entitlement deals blew up—especially those that were simply purchased to support a 2020 brand initiative.



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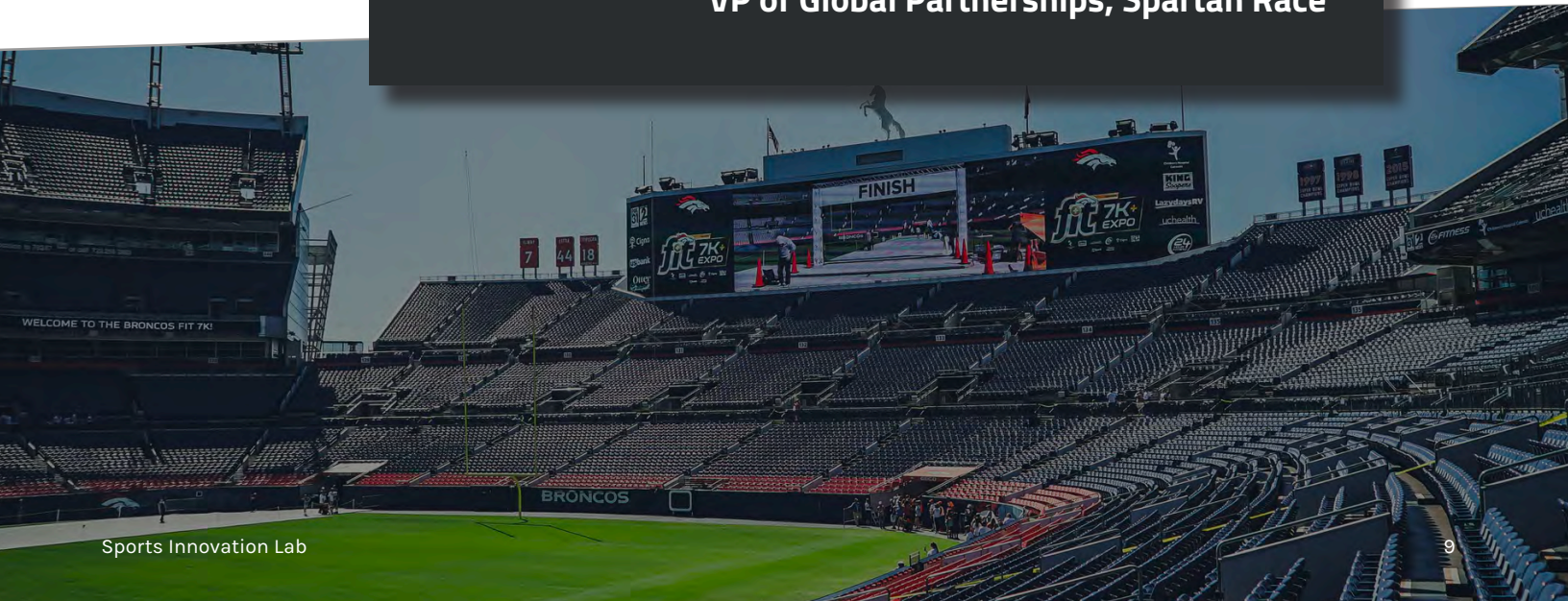
The amount of global sports sponsorship revenue estimated to have been lost to the COVID-19 pandemic²



“Our long term deal with Rakuten is a perfect example of the way things need to be done. They support our live events and help run our company with fulfillment services. When business took a hit, we worked together to put things back on track with content we could both monetize.”

Ian Lawson

VP of Global Partnerships, Spartan Race



Who Will Be the Change Agents in Sports Sponsorship?

Given the mounting pressures facing the world of sports sponsorship, there is a need for leadership to help the industry prepare, and to change the approach to selling and buying sponsorship. Yet few organizations have the technology or design skills to start immediately designing digital sponsorship programs that feed customer databases in meaningful ways. That takes a lot of planning, hiring, and experience.

Perhaps more disturbing than the lack of skills is the lack of motivation. Experts agree it is hard to imagine this data-driven approach gaining traction because the traditional power structure has too many parties with vested interest in keeping the status quo. One Leadership Board member told us, "As long as there is another check waiting to snatch up or bid up a category, asking your partner to work with you harder to acquire data or do things differently just isn't in the cards."

Groups	Current Approach	Disruptive Forces
Sports Properties	Media ratings and viewership are sufficient to sell sponsorship	Viewership is fragmented and ratings are slipping
Athletes	Endorsements and appearances work well for the stars	Platforms like Instagram and Cameo give athletes new power
New Endemics	Category exclusivity can be bought not earned	Case studies and true proof of technology requires integration
Agencies	Street teams activate to drive brand awareness and consideration	Pressure to deliver ROI metrics that rival digital marketing visibility
Traditional Brands	Hospitality driven sales - luxury boxes and sideline access	Want breakthrough experiences that deliver scale



"At the NHL we have focused a great deal on innovating our puck and player tracking technology and those innovations are going to allow us to create a wide partnership ecosystem with a large number of diverse partners. All these partnerships are really going to allow us to bring the data to life in new ways for our fans."

Heidi Browning

EVP, Chief Marketing Officer, National Hockey League

For the Brave, Data is the Path Forward

No one group will change the traditional sponsorship model, but the intrepid leaders who advance their approach to sponsorship will capture more value. These leaders will start by acknowledging that Fluid Fans are not traditional die hard fans. Fluid Fans shift their attention continuously during live sports and have the power to choose any number of entertainment options. If another form of entertainment captures their attention or fulfills their needs better, they're off.

Sponsorship design needs to embrace the concept of Fluid Fans and architect sponsorship activations around "what is it a fan wants to do," and "why do they want to do it?"

Motivations are the why fans do things. People are complicated, and so are their motivations, and so while we can categorize the reasons a fan does something, we must know that motivations often overlap and intersect.

For us innovating on sponsorship means focusing on Fluid Fan Behaviors and motivations. These behaviors are the essential building blocks for developing a smarter, more forward-looking sports sponsorship strategy.



We've seen this trend toward new endemics building for years. There are new kinds of brands involved in sport now. They want more from their partners and expect deeper integration with the properties they work with.

Jeff Meesson

Senior Vice President, Octagon



Data-Driven Sponsorship

The Next Generation of Sponsorship will not just be about associating or activating differently, or just about new names for the same old sales inventory.

For the sports industry to compete with how the markets have evolved in attention-based industries, it will need to focus on fan data that takes us deeper than just knowing who a fan is, and dives into how and why fans act.

Toward a Richer Customer Relations Management Database

With so much skepticism about changing sponsorship, the approach to change needs to be gradual and achieve measurable and meaningful short term goals. For example, look at the customer database. Chances are the most complete records of fans will include name, address, email, and purchase history. There will be little in the database to tell brands or properties what behaviors fans do. So, start there. Figure out what behavior matters to the business and economic success of the partnership. "We care about fans who bet."

The next sponsorship campaign is about testing for that behavior but not just activating the brand partnership. Testing in a way that starts to capture and flag the fans who bet or show interest in the opportunity to bet. When skeptics say, "We do this today." It's rarely true. A massive daily fantasy campaign does capture data for FanDuel, Yahoo, MGM, or DraftKings, but one party collects that data when fans sign up. The other property is usually blind to what happens next with that fan. It's a huge miss.

Sports sponsorships that tap into the behaviors well, will learn how Fluid Fans bet on games, create their own video highlights, share food pictures, or compete with one another—the brands associated with delivering those experiences to fans will be the beneficiaries of stronger brand association than in the past. No longer will a brand be just an "official partner" in name alone, they will be enriching the experiences of fans, delivering value to them authentically.

More importantly, Next-Generation of Sponsorship will set up partners to tap into the power of behavioral data that will radically change the way sports sponsorship is bought and sold.



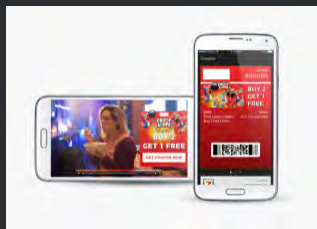
"Right now so many sponsors are trying to limit content creation from fans at the venue due to the media rights deals. We need to encourage that great content creation so the 80,000 people in the stands, the athletes, the teams, the leagues, the sponsors and the broadcasters in the ecosystem can all win."

Ricardo Fort

Head of Global Sponsorships, Coca-Cola

Closing the Gap Between “Call to Action” and “Transaction”

Another distinct advantage to designing partnerships around behaviors, is it can move marketing from being about messaging to being about action, and in so doing, it unlocks access to important behavioral data. Instead of simply building brand awareness or delivering a "call to action," when a sponsorship uses technology to address Fluid Fan motivations and behaviors, it is encouraging the fan to take action.



For interactive media company **Promethean.TV**, the goal is to close the gap in marketing between the messaging and the consumer action. Their interactive video overlays are designed to drive

transactions. It's the necessary evolution from the now archaic web banner ad that launches the viewer into another browser tab to a more streamlined, non-interruptive way of driving a viewer to taking an action. Whether signing up for a test drive, or purchasing a jersey of a player who just scored, it's about contextualizing interactions with OTT, and providing the multitasking that viewers would be doing anyway without distracting them from the action.



So much of sport is impulse driven. If we can tap into a fan's passion, it is a reflex for them to reach out and buy directly from content they love. It's one way they can show their support. Our case studies show that people are, both literally and metaphorically, voting with their clicks for the chance to be connected in a real way to the teams they adore.

Ian Sharpe
CEO, Promethean.TV

Getting Started: Using Sponsorship to Capture Data

When sponsorship is designed to support a specific behavior, brands and properties can accurately measure if fans actually DID the intended behavior. The opportunity to capture and capitalize on data gathered during sponsorship is the key to raising the visibility and status of sports sponsorship amongst competing marketing initiatives. Fan data will lock in partners and help deliver predictable results.

Three Modes of Sponsorship: Association, Activation, Platform

To help sports properties and brands start working on Next-Gen Sponsorship opportunities, we have developed a way to capture data across three modes of sponsorship: Association, Activation, and Platform.

These modes vary in their design requirements, on their reliance on technology, and in their value to sponsors, but each kind of sponsorship can add to knowledge about fans and build a foundation for future campaigns and product development.



"70% of our fans do not follow or engage with a big five sports league (NFL, NBA, MLB, NHL and MLS) and they're over four times more likely than the general audience to be passionate about gaming. And as a tech company, we can integrate partners into any aspect of our sport -- whether it's through our new DRL video game on Xbox or high-speed drone racing events on NBC and Twitter -- to help them engage with our audience of innovative, next-generation sports fans."

Nicholas Horbaczewski
CEO & Founder - Drone Racing League

Association Sponsorships

Capturing Data Through Calls to Action

Behavioral Design:	Low
Reliance on Technology:	Low
Value to Sponsors:	Profile Enrichment

It's easy to see that Association Sponsorships don't provide lots of opportunities to collect data. That should change with simple prompts and design features that collect feedback from fans. Polls, chat fields, registrations, giveaways, and other sponsored elements can be added to build into these sponsorship elements the opportunity to learn more about fans. LiveLike, Promethean, and Maestro other broadcast enhancement technologies enable these features. There is evidence that fans are predisposed to share their data with the brands they trust and love, and for most consumers, sports brands top the list of brands they trust and love.

What to Do:

The first important challenge is designing sponsorship agreements that make it clear where to put the data once it is collected. The hardest part of this agreement is deciding who owns the data and what the different parties are authorized to do with it.



Activation

Sponsorships

Capturing Data Through Digital Experience

Behavioral Design:	Low
Reliance on Technology:	Medium
Value to Sponsors:	Behavior Data

Activations are now commonplace marketing relationships in the sports industry. Often, the brand will partner with the sports property or athlete to create a memorable experience for fans that they will then positively associate with the brand. Activation Sponsorship is very popular in sport because it can align timing of product launches or market campaigns and reinforce key brand positioning in competitive geographic markets. The marketing spend required to breakthrough the clutter of other forms of advertising means sponsors are "heavying up" during the live sports event. That focus should include clearer paths to data capture because these experiences can truly test demand for specific products and services. For example, a full-featured mobile and augmented reality display in the venue should include a way for fans to receive something after the game they can share with friends and family. The continuation of the media experience at home improves opportunities to learn more about housemates or family members who didn't attend the game.

What to Do:

Design mass market activations to test specific behaviors. Each behavior should have a beginning and an end. The journey should help brands and properties see if an audience is predisposed to bet, play, share, create, or learn more. The sponsorship reports should measure what they did or did not do, not just count eyeballs and impressions.

Platform Sponsorships

Capturing Data Through Membership

Behavioral Design:	High
Reliance on Technology:	High
Value to Sponsors:	Behavior Platform Data

The most sophisticated sponsorships will evolve into partnerships where digital platforms are at the core of the relationship. These partnerships are not constrained by any one activation, and the goals are more far-reaching than just a simple brand association. There are early examples of these partnerships at play today. They provide a window into what co-development and long term deals will look like when a sponsor develops a platform with a sports property. Collectively, the two parties identify core motivations and behaviors of Fluid Fans and deliver them an authentic and valuable experience that enriches their relationship to sports. This may take the form of a betting, or a fan photo-sharing platform that fans can continuously use and return to. Because of the nature of sponsorship, the relationship with the fan is one similar to that of a digital membership or subscription. The reliance on new technology is high and retention is a desired outcome so data and fan insights improve over time.

What to Do:

Define the fan behaviors that are core to your organization. For properties, that means having a firm grasp on what your fans DO that fans of other properties don't do as often. Align these behaviors with brands who have strategic interest in those behaviors because they connect deeply to revenue and growth opportunities. Through this process, you'll identify your platform partner targets. For brands, lean on properties to think and sell this way. If you're aligned on these behaviors, reject the standard entitlement packages. Ensure your partnership includes opportunities to develop long term fan value through digital products and services and the agreement clearly articulates data acquisition and use. Finally, run lots of smaller budget activations to test your thinking. Then start developing longer term data assets (shared CRM systems and customer profiles) that allow for better targeting and personalization of the fan experience.

Innovating on Measurement

As sponsorship evolves to focus on the importance of fan data, the industry will need to continue improving on measuring and analyzing that data. An essential first step is presenting fans with more opportunities to interact and engage with sports, but it is no simple feat to simply "collect" that data and analyze it to be actionable.

Fortunately, this is an already active space in sports tech, with companies focusing on the many different parts of the measurement and valuation ecosystem. From **Experience Analytics**, to **Sentiment Analysis**, **Social Listening** to **Image Recognition Software**, companies like BlinkFire Analytics, Block Six Analytics, Nielsen Sports, Gum Gum, Meshh, and Zoomph are pushing this segment of the industry forward.

The logo for Gum Gum, featuring the word "gumgum" in a lowercase, sans-serif font. The "g" is yellow, "u" is grey, "m" is grey, and "gum" is grey. A small grey square is positioned above the second "m".The logo for Nielsen Sports, consisting of a blue square with a white "n" inside, followed by the words "NIELSEN SPORTS" in a blue, uppercase, sans-serif font.The logo for Zoomph, featuring the word "zoomph" in a blue, lowercase, sans-serif font.The logo for Block Six Analytics, featuring the letters "BA" in a bold, purple, sans-serif font. A purple line forms a circle around the "A".The logo for BlinkFire Analytics, featuring the word "blinkfire" in a blue, lowercase, sans-serif font with a blue flame icon above the "i". Below it, the word "analytics" is written in a smaller, blue, lowercase, sans-serif font.The logo for Meshh, featuring the word "meshh." in a dark blue, lowercase, sans-serif font.A large, stylized, red-outlined icon of the letter "G" repeated twice, positioned to the left of the quote box.

"We sit at the table with properties and brands, helping them understand sponsorship goals and measure value across social media, digital, and OTT. Now more than ever, there's an opportunity to "think outside of the box" on these partnerships, and address the ever-evolving fan experience. Data-driven sponsorship can provide insights to help tell a story and create content that's engaging and powerful. We're excited to play a role in the future of this industry."

Alexis Prousis

VP of Marketing, BlinkFire Analytics



Pioneers of crowd-controlled camera technology, **Brizi**, have developed a novel approach to interactivity that taps into the need for behavior data. Their technology asset is now found in venues spanning 12 countries, and focuses on core Fluid Fan behaviours of Capture and Share. BriziCam provides fans personalized photo/video

memorabilia that grows in value with time, and insights on demographics and behaviors such as affinity, section activity, and fan emotions.

For example, The Australian Open commercialized BriziCam as a platform sponsorship to premier sponsor Emirates Airlines. BriziCam fulfilled strong “in-bowl digital fan engagement.” This ongoing sponsorship has seen over 69,000 groups of users capture over 106,000 group photos to-date. In fact, 81% of fans answered they would be “very disappointed” if the activation were to go away.

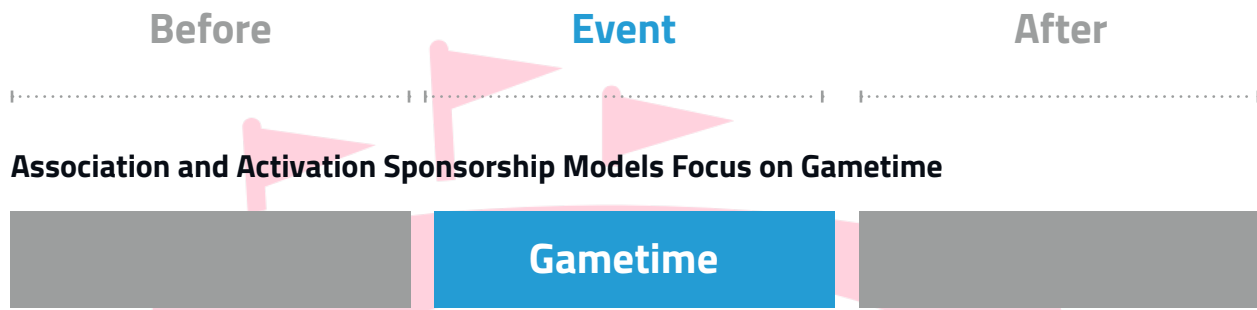


How venues 20 years ago thought about upgrading static billboards to a versatile Jumbotron --- is how our clients think about upgrading in-game contests/campaigns to BriziCam. The best properties know they need to adapt their sponsor asset inventory to customizable and data-driven digital platforms that can also deliver powerful fan insights.

Anna Hu
CEO & Co-Founder, Brizi

Sponsorships Before, During, After, and Between "Gametime"

So much of current Association and Activation sponsorship models are designed to maximize the visibility of the sports event, or "gametime." Branding, signage, exclusive game moments like sponsored power plays in hockey, or pitching changes in baseball—all these examples fundamentally hinge on the action of gametime.



Association and Activation Sponsorship Models Focus on Gametime

Today, "gametime" activations largely focus on moments and action that occurs during the live sporting event.

Platform Models Expand the Time Envelope



With "platform" activations, the window for engaging fans widens to include the moments before, after, and even between games, to bridge the gap between events.



"Our new stadium has given us an opportunity to engage a different kind of sponsorship partner. Our recent deal with Google is a great example of how we're building longer term relationships and creating assets that will help us deliver breakthrough fan experiences. We know the Fluid Fan is here, and our venue lets us build year round entertainment options for our customers. Our partners understand this, and we're eager to get to work."

Jason Griffiths

Vice President - Partnerships, LA Rams



"We've always viewed sponsorship value as extending before and after the puck drops. We've built into our fan behavior that they come an hour before the game for Knight time, and that's a perfect example of the experience we deliver. That's a different kind of value for our brand partners."

Brian Killingsworth

Chief Marketing Officer - Vegas Golden Knights

Expanding the Gametime Window with "Knight Time" and The Vegas Golden Knights

"Being in the entertainment capital of the world the Vegas Golden Knights knew they had to do things a little different when they launched their franchise three years ago.

One of the main areas of focus was to put on a "show" at each game, beyond the product on the ice. The goal was to become the "hottest show on the strip". The way the Vegas Golden Knights accomplished that was to advertise and promote the show before the show, more affectionately known as, Knight Time. Knight Time starts thirty minutes before puck drop and that is when the gameday entertainment starts. From a parade march to the Fortress to pregame performances by Cirque du Soleil and Blue Man Group to warm up skates with dueling DJ's.



All of that entertainment precedes a legendary pregame performance each game that incorporates a live "sword and the stone" showdown on the ice on top of an ice projection mapping interactive display. VGK fans now know they better be in their seat each game before Knight Time begins to see the show before the show. The team only promotes Knight Time in advertising for each game and not the puck drop time. This has truly become must-see viewing for home and visiting fans that come to Las Vegas for each game and is a good example of activating beyond the confines of the actual game."

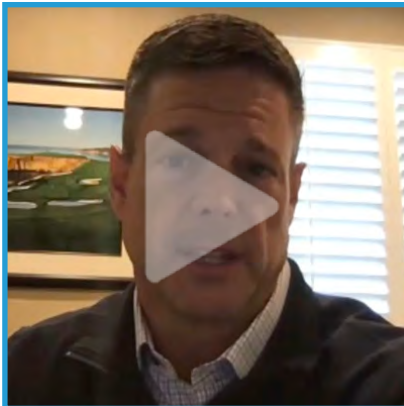


“Sponsorship programs can be designed with so much more thought and alignment, but as long as there’s another buyer waiting with a check, the industry is conditioned to find the path of least resistance.

Visa will continue to seek long term partnerships that build value beyond impressions. We believe strongly that we add strategic value to properties and can fundamentally improve the fan experience.”

Kristina DeYoung

Global Brand & Innovation Marketing - Visa



“When we are working with properties, not only do we want to ensure that they are getting the most value, we want to be the network that powers their other partnerships as well. Our goal is to offer a completely connected network for the venue operator and a seamless mobile experience for the fan.”

Ken Martin

**Executive Director, Global Digital Transformation
Sports and Entertainment Consumer Industries**

*During the Sports Innovation Lab “Ask Me Anything”
May 7, 2020: <https://www.sportsilab.com/ama-series>*

Before The Game

Instead of Just Buying This...

- Pre-Game Logos
- Draft Event Logos
- Press Backdrops
- Ads during Pre-Game show
- Practice Jersey Patch

And Only Measuring This...
Impressions

Design and Activate This...

Gametime - The opportunity to weave together ticket platforms, mobile wallets, transportation, content, and access control to make getting from the driveway to the gate a breakthrough fan experience.

To Enrich Your Fan Profile
Sponsors will gain insight into when fans arrive, how long they stay, and spending patterns.

During The Game

Instead of Just Buying This...

- Venue signage
- In-Game Moments
- Luxury Box signage

And Only Measuring This...
Impressions

Design and Activate This...

Moneyball - The opportunity to provide statistical overlays, graphics, and broadcast enhancements that fans log into access and share.

To Enrich Your Fan Profile
Sponsors will gain insight into which athletes, game moments, and media formats are in high demand and have the potential to go viral.

After The Game

Instead of Just Buying This...

- Post Game Logo
- Post Game Ads
- Luncheons

And Only Measuring This...

Impressions - Hospitality

Design and Activate This...

Mic'd Up - The opportunity to provide fans direct access to the locker room, press conference, and athletes through digital media platforms.

To Enrich Your Fan Profile

Sponsors will identify creators and super fans who are willing to spend more for exclusive opportunities - scaling the traditional back-stage access that happens in venue.

Between Games

Instead of Just Buying This...

- App Entitlement
- Website Entitlement

And Only Measuring This...

Impressions

Design and Activate This...

Level Up - The opportunity to create fantasy sports lineups, digital competitions, casual games, and other forms of competitive entertainment.

To Enrich Your Fan Profile

Sponsors and properties will learn more about the social networks of fans. Who are their co-workers, their college friends, and their family -- and build rituals around events that can operate in the "off season."

Examples of Innovative Tech Integrations Today

Microsoft X NBA

Microsoft and the NBA have inked a multi-year 'Fan Alliance' deal which kicked off with the virtual fan video experience that brings fans to the sideline through Microsoft Teams. For 320 fans each game, the league is leveraging the Teams platform to make it look like fans are sitting on the sidelines, and allowing them to interact with each other, demonstrating the power of the Teams platform as it tries to recreate the feeling of actually being together.



Image Courtesy of NBA.com

AWS X Bundesliga

Bundesliga and AWS are working together to help fans gain insight into what's happening on the field during games. The product, called Match Facts, is introducing two new statistics for fans to digest: Average Position and xGoals. Average Position will help fans understand where a player is on the field in comparison to the team's intended style of play, so fans will know if a player is in a good or bad position at any given time. xGoals will relay the likelihood of a player scoring a goal based on where he shoots the ball. The model was built on 40,000 historical shots, and takes into account speed, defenders, the goaltender's position, and more.



Image Courtesy of bundesliga.com

Google X MLB

MLB and Google are working together to make the historical and current content archives searchable, sharable, and clippable. Enter MLB Film Room. The new product from the tech giant and the league makes some 3.5 million highlight videos available through 30 different filters, where fans can see similarities (and differences) between players of different generations, they can see the way a certain play or pitch has evolved over time, and can create customized and ready to share clips based on individual interests.



Image Courtesy of MLB.com

It's Time To Lead

When the health crisis hit, and there was no "gametime" brands and properties battled over where to find the exposure required to fill the gap. Properties dug into their media archives, some media companies spun up virtual sporting events, and worse, many turned to email blasts.

Platforms provide greater stability because sponsorship investments help acquire, grow, and enrich the profile of fans. The database becomes an asset - not for email marketing, not for ticket sales, but for sponsorship. Before a game or after a game, sponsorship will deliver value and grab the attention of fans in a way that is welcomed and familiar.

The Next Generation Sponsorship Leadership Board has been clear. They don't think the industry is ready for this change. So much is up in the air at the moment, it truly feels like this is a now or never moment to push harder on this opportunity. Big changes are coming. This is another disruption brewing for the sports, media, and entertainment industry. Teams will own and operate their own OTT channels. Athletes will continue to reach out directly to their fans on social media and build their own businesses. Stadiums will continue to host different forms of entertainment and retail. What will sports own in the end if digital brands and media platforms own the Fluid Fan's attention?

It's time to lead. Own the Fluid Fan. Now is the opportunity to use next generation sponsorship data to truly deliver a breakthrough fan experience for your Fluid Fans.

About this Report

To develop this research, Sports Innovation Lab and its Next Generation Sponsorship Leadership Board spent 2019-2020 reviewing market behavior, evaluating vendors, and conducting interviews with market experts.

The Board met every three months to review market analysis created by Sports Innovation Lab's proprietary data, to discuss and identify trends, and to share best practices.

In addition to the work of the Leadership Board, Sports Innovation Lab also conducted interviews with experts from across the sports industry.

This report represents the knowledge collected and shared by the board members, and the responses from additional interviews in conjunction with extant research into the field of Next Generation Sponsorship conducted by the Sports Innovation Lab.

2019-2020 Next-Generation Sponsorship Leadership Board Members:

Columbia University - Joe Favorito, Lecturer and Sports Strategy Consultant (Co-Chair)

FIFA - Nick Brown, Director of Commercial Revenues

National Hockey League - Heidi Browning, EVP, Chief Marketing Officer

Rover - John Coombs, EVP, Co-Founder & CEO

Visa - Kristina DeYoung, Global Brand & Innovation Marketing

Coca-Cola - Ricardo Fort, Head of Global Sponsorships

Mastercard - Michael Goldstein, Vice President - Head of Sponsorships, North America

Los Angeles Rams - Jason Griffiths, Vice President, Partnerships

Drone Racing League - Nicholas Horbaczewski, CEO & Founder

Brizi - Anna Hu, CEO & Co-Founder

Vegas Golden Knights - Brian Killingsworth, Chief Marketing Officer

Spartan Race - Ian Lawson, VP Global Partnerships

Cisco - Ken Martin, Executive Director, Global Digital Transformation Sports and Entertainment Consumer Industries

Octagon - Jeff Meesson, Senior Vice President

Athletes Unlimited - Jon Patricof, CEO & Co-Founder

Blinkfire Analytics - Alexis Prousis, VP of Marketing

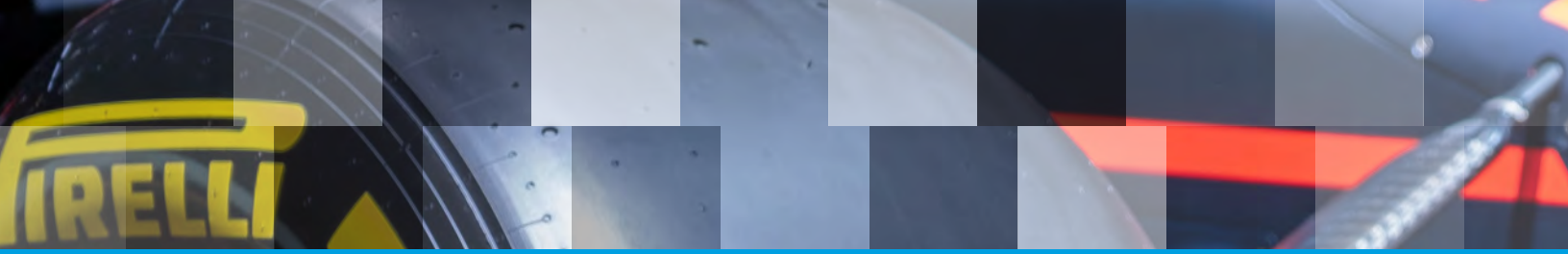
The DOW Chemical Company - Mike Reed, VP of Olympic and Sports Solutions

Promethean TV - Ian Sharpe, CEO

Nielsen Sports - Jon Stainer, Managing Director Americas

1. The term "new endemics" we borrow from Lou Kovacs, President of Marketing and Events, North America and his team at Octagon

2. Sports Innovation Lab, 2020



Sports Innovation Lab empowers sports brands to create breakthrough fan experiences through technology.

Sports Innovation Lab is leading a sports research revolution. We exist to educate our clients on the technological possibilities for their brand and how to ultimately drive value to the end consumer: the Fluid Fan™. We inspire brands to create bold fan experiences through data-driven technology insights and industry-leading research.

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