

BLINKFIRE ANALYTICS 2020 INSIGHTS REPORT



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INTRODUCTION

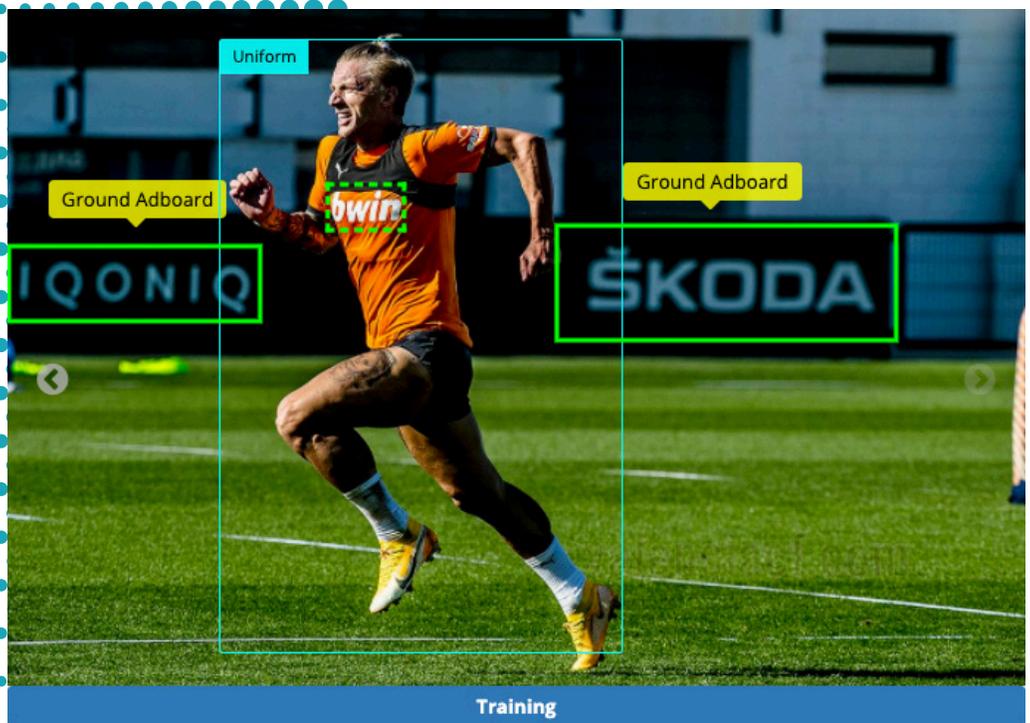
Welcome to the Blinkfire Analytics 2020 Insights Report, a recap for digital media in sports, media, and entertainment. We have a unique dataset that provides a comprehensive picture of how content is related between entities in our platform -- starting from teams, leagues, players, and their sponsors, and extending to media companies, blogs, influencers, venues, ownership organizations, esports organizations, and federations.

Although we **primarily license this data directly** to rights holders and their sponsors across owned and non-owned entities on a **software as a service (SaaS)** basis, we also have an amazing dataset from which to infer both macro and micro trends in publishing content.

But first, some fun facts about our dataset. One thing is for sure: when you read these industry reports, they are through the lens of the available data that the data platform has, or the research

company -- which we are not. This report is no different. Some of the data points will be skewed toward our available dataset.

Nevertheless, **we think we have the most comprehensive dataset on digital and social media in sports and entertainment**, as we believe we were the first to model the taxonomy of the landscape and track it in its entirety, whether the data was licensed or not.



**Based on data from January 1, 2019 - December 31, 2020*

FIRST THINGS FIRST.



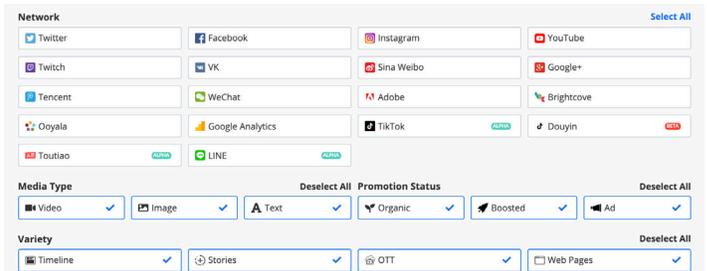
Our dataset is composed of **more than 267 million items** at the time of this writing this report.

We call our dataset “items” instead of “posts” because although the bulk are social media “posts”, the landscape has evolved within social media where there are “items” like “stories” plus Facebook and Twitter live broadcasts (separate from their video on demand - VOD versions). “Items” outside

of social media could be Advanced TV or linear broadcasts and web pages, as well as mobile app pages. We also cover a number of Asian social media channels that tend to publish “messages” which are published to subscribers.

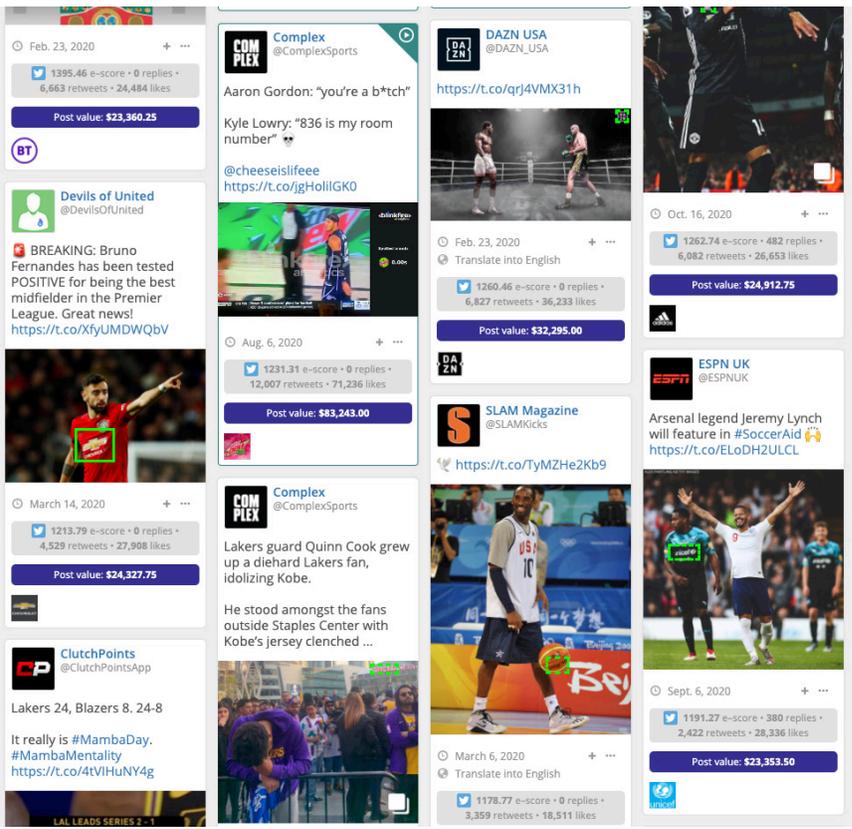
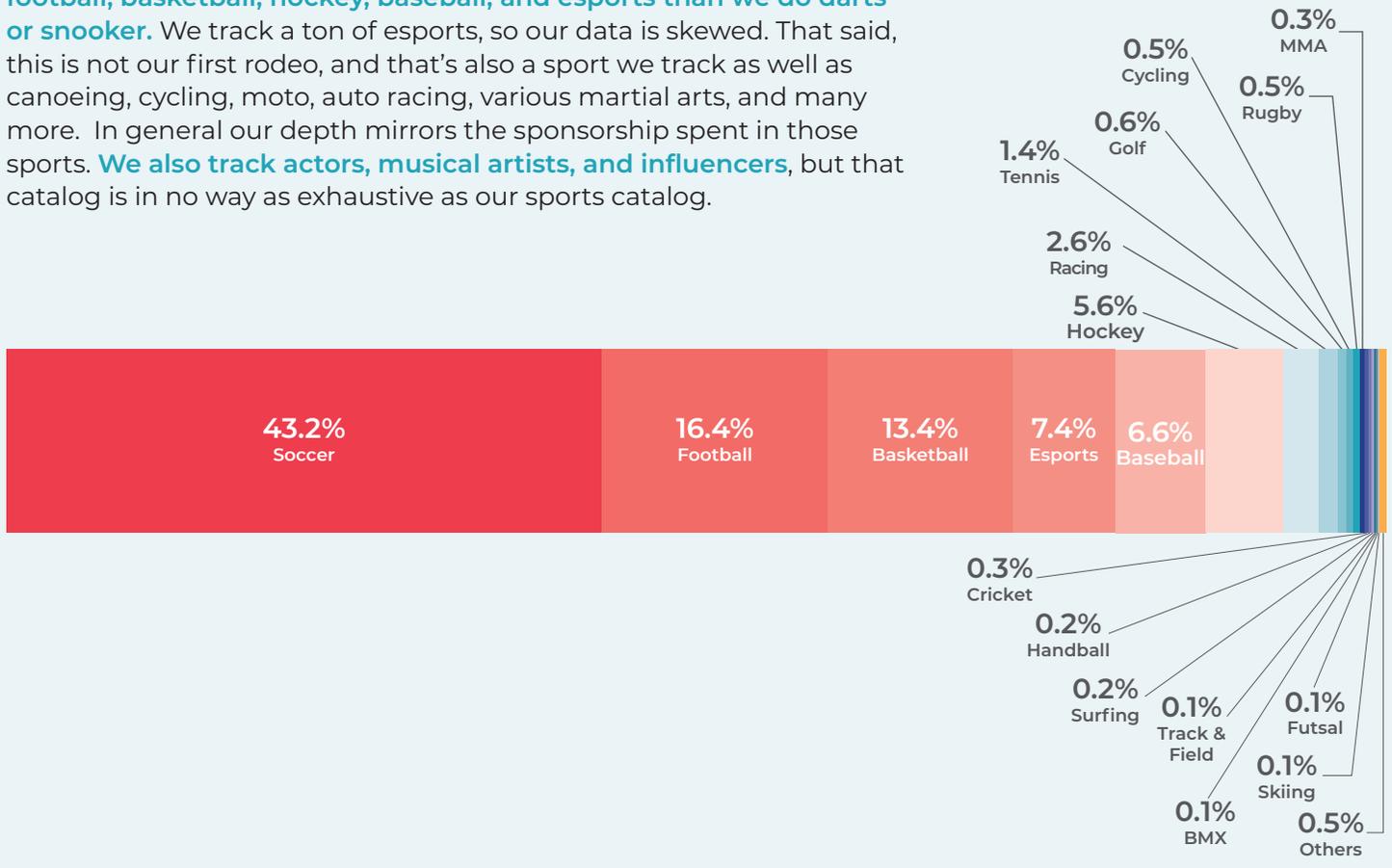


All channels and mediums are not represented throughout the entire dataset. Social networks come and go. For instance, we tracked Google+ and Tencent Weibo while they existed, and more recently have added Asian networks like Sina Weibo, Toutiao, and Line, which have existed much longer than the scope of items in our dataset. We also have been tracking ads (aka “dark posts”) as of this year. We generally only track OTT programming and broadcasts for paying customers. We also do not have posts from places where our crawlers are legally prohibited to access.



*Based on data from January 1, 2019 - December 31, 2020

Some sports are bigger than others. We track more soccer, American football, basketball, hockey, baseball, and esports than we do darts or snooker. We track a ton of esports, so our data is skewed. That said, this is not our first rodeo, and that's also a sport we track as well as canoeing, cycling, moto, auto racing, various martial arts, and many more. In general our depth mirrors the sponsorship spent in those sports. **We also track actors, musical artists, and influencers**, but that catalog is in no way as exhaustive as our sports catalog.



Our media coverage has grown over the years and is not constant throughout the dataset. In the early years, we mainly tracked rights holder and sponsor content but have now built out a comprehensive model of the industry. **Currently, more than 40% of the content we track comes from media companies, blogs, and other “non-owned” media.**

Finally, and thank you, Captain Obvious, although we are doing a year-to-year comparison in this report, **2020 has not been a typical year.** In every almanac, record book, or online wiki-whatchama-pedia entry, any stats in 2020 are going to have a big, bold asterisk by them. So, although publishing by rights holders has accelerated in the pandemic, our collection of posts from fans in and around stadiums are practically non-existent in 2020.

*Based on data from January 1, 2019 - December 31, 2020

CONTENT TRENDS

Let's take a bird's eye view of some 2020 content trends.

VIDEO vs IMAGE 2019 & 2020



5.6%
increase in
2020



27%
increase in
2020

INCREASE OF INSTAGRAM STORIES

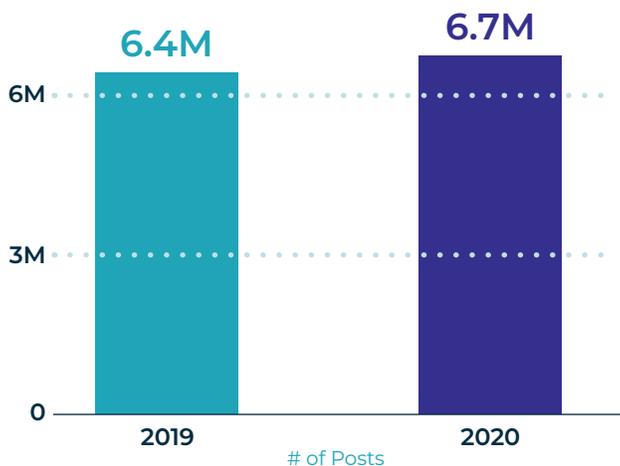
With the increase of short form content, Instagram Stories received a boost in 2020. More teams, leagues, athletes, and influencers used Stories to give fans behind the scene access into pre/post games, training, and daily life.



8%
increase in
2020

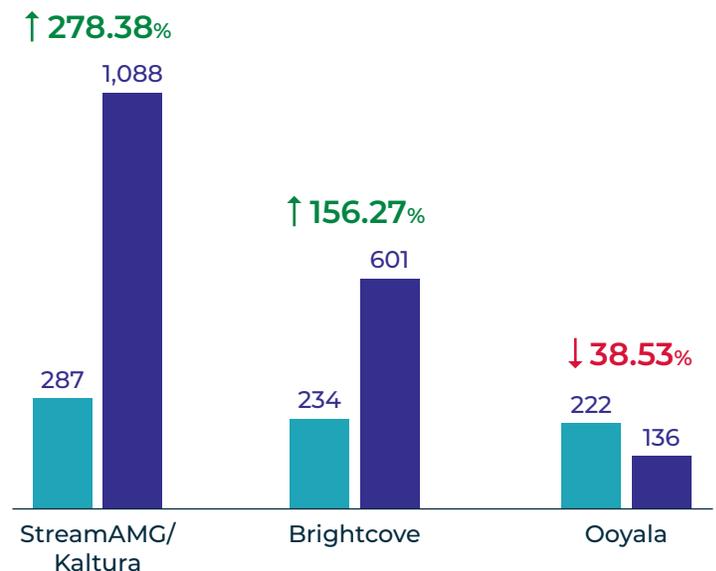
THE RISE OF VIDEO

From 2019 to 2020 **posts with at least one video increased by 4.5%**. We're seeing rights holders and media companies post more video, whether it's a single video, or a multi-media post that includes both image and video (Instagram is the platform winner for that).



VIDEO RETENTION

Blinkfire tracks Advanced TV platforms like StreamAMG/Kaltura, Brightcove, and Ooyala (acquired by Brightcove).



*Based on data from January 1, 2019 - December 31, 2020

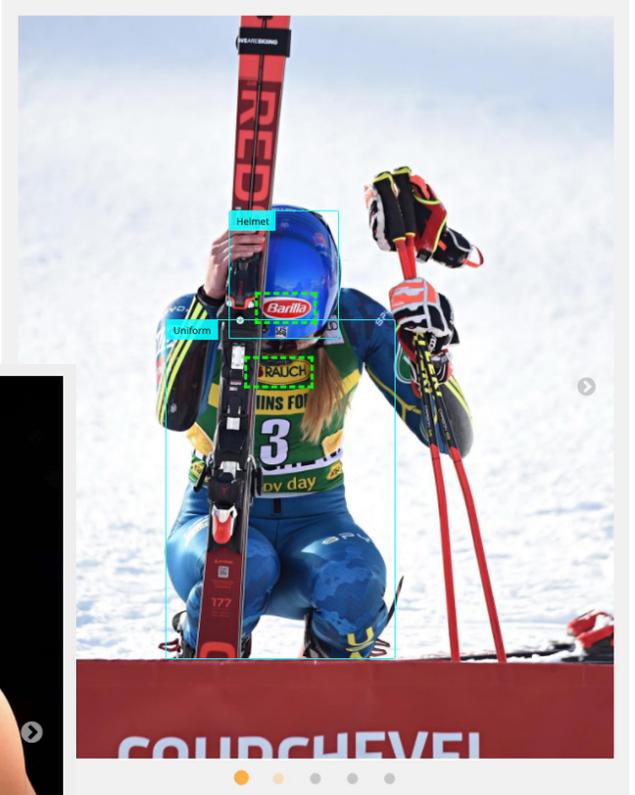
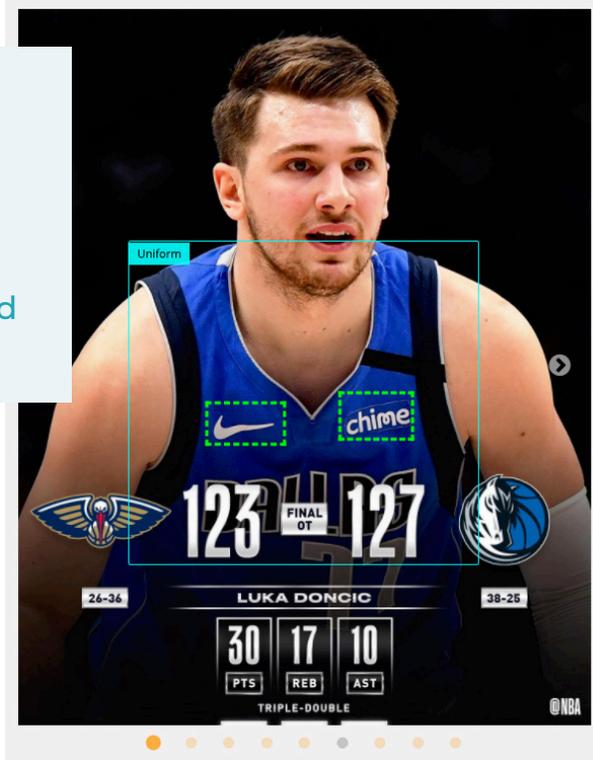
CAROUSEL POSTS

Carousel posts, which are more than one item in a single post, **is a content theme rights holders have adopted in 2020**. Instagram is not the only platform where carousels are posted, but also Twitter, Facebook, and WeChat.

Carousel posts increased by

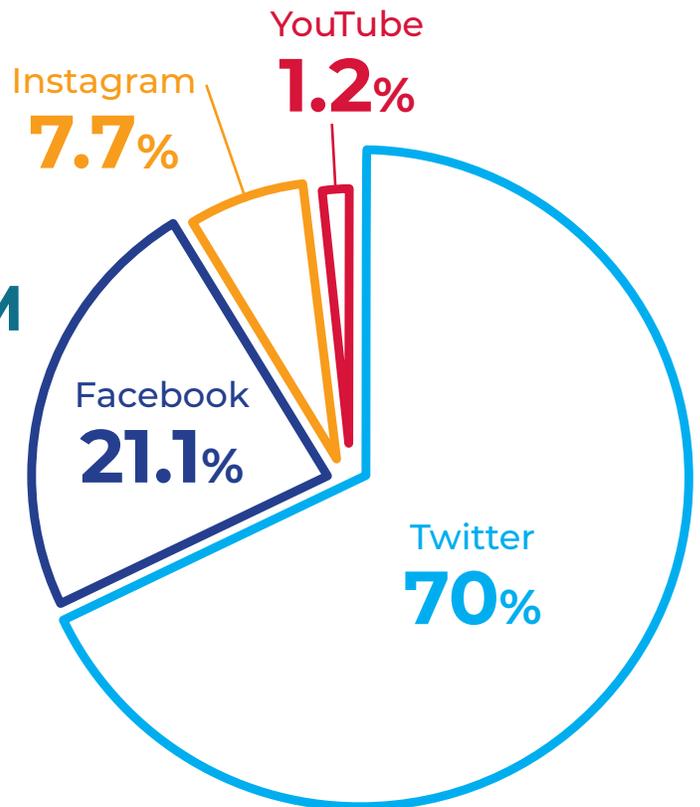
76%

in 2020 compared to 2019



POSTS PER PLATFORM

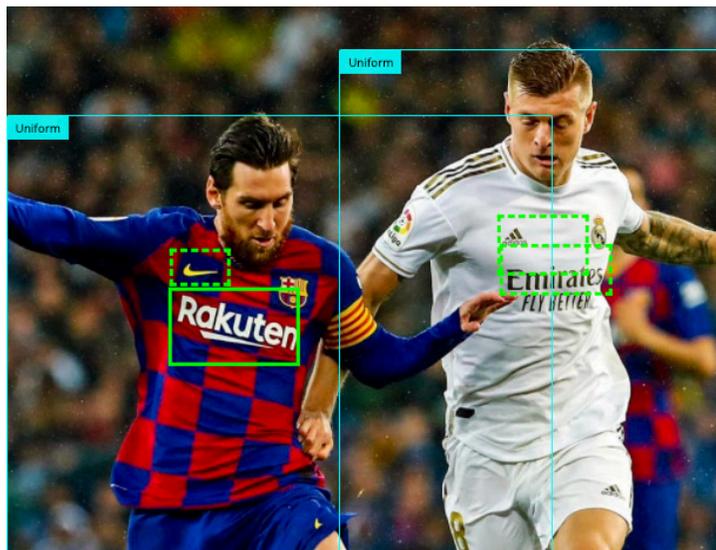
Twitter makes up more than 70% of posts in **Blinkfire**. Considering how the platform performs and that the lifespan of a tweet is 15 to 20 minutes, rights holders and media companies use Twitter for such things as score updates, memes, discussions, and poll votes. It's a place where content turnover is rapid. **Instagram on the other hand makes up 7.7% of Blinkfire**, but drives more engagement and value.



*Based on data from January 1, 2019 - December 31, 2020

SPONSORSHIP EXPOSURE TRENDS

2020 was a wild year in sports and sponsorship. **With sports' three-month timeout due to the COVID-19 pandemic**, we were thrown into a jam-packed summer and fall, squeezing in a year's worth of competition into six months.



1 Until other apparel & sporting goods makers bring the competition, the likes of Nike, Puma, and adidas will continue to earn the most engagement (pandemic or not).

2 League-wide partnerships are impactful.

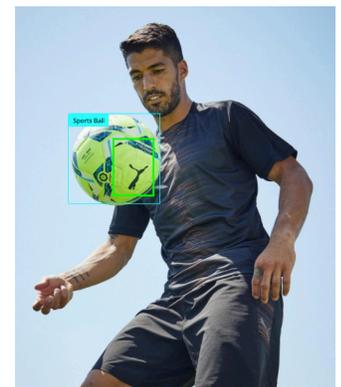


*Based on data from January 1, 2019 - December 31, 2020

We created top 10 brand lists (overall and by sport) based on engagement earned for 2019 and 2020. **Engagements are based on public engagements such as a like, comment, share, or retweet across the platforms we track.**



3 Being good and winning matters (usually). And, it's a plus if you have marketable, famous players on your team.

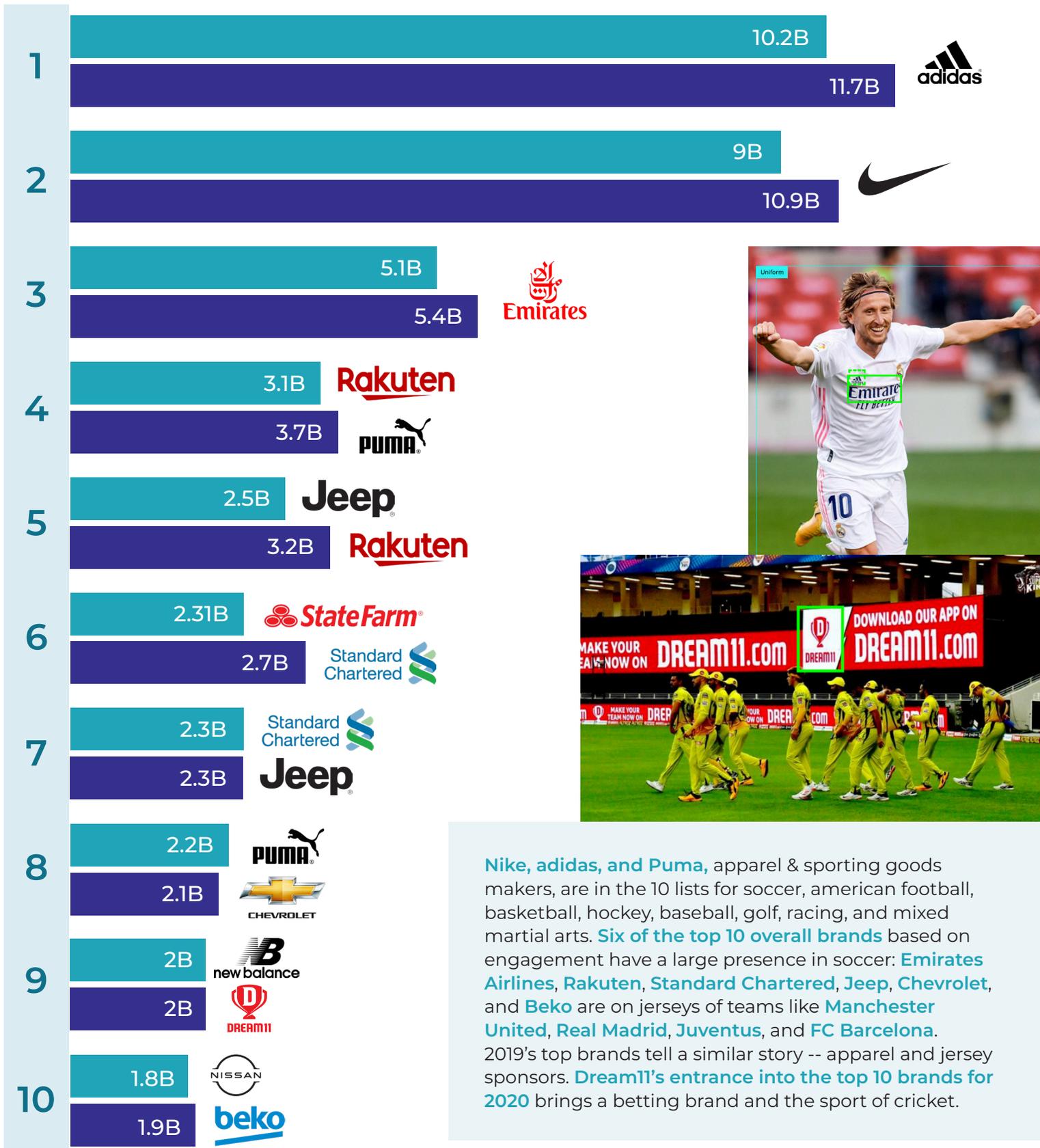


4 Soccer's global reach is still supreme.

5 Esports saw astonishing growth.



TOP 10 BRANDS TOTAL ENGAGEMENT 2019 vs 2020



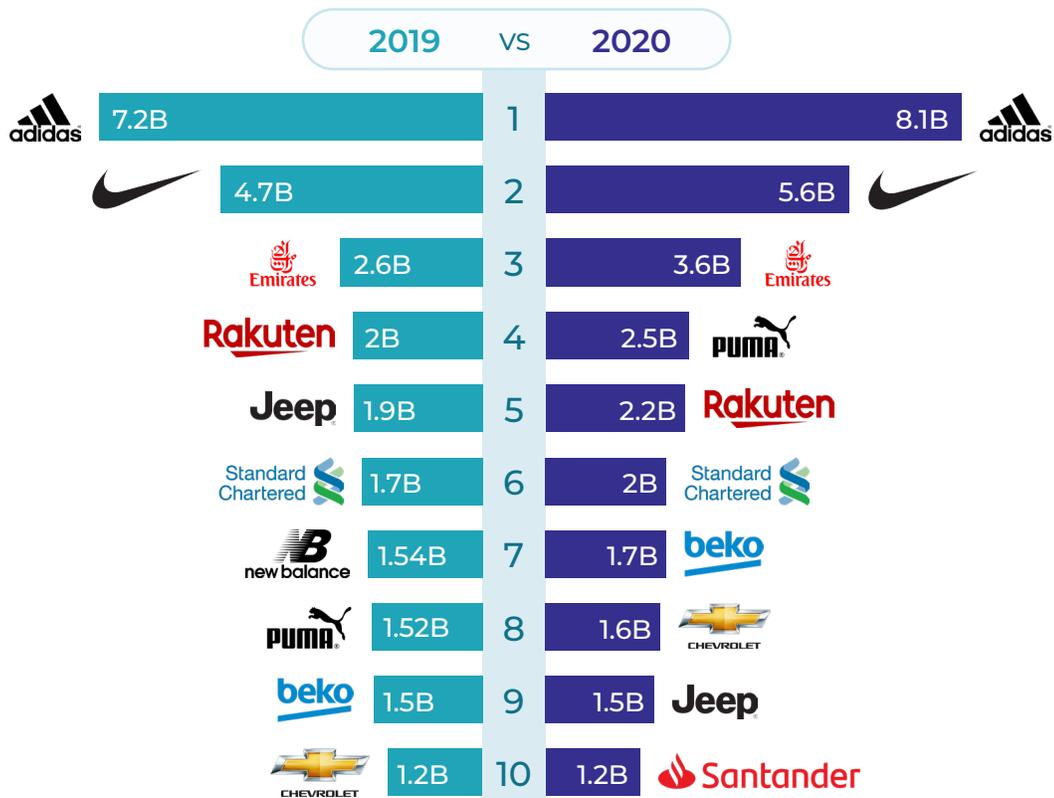
Nike, adidas, and Puma, apparel & sporting goods makers, are in the 10 lists for soccer, american football, basketball, hockey, baseball, golf, racing, and mixed martial arts. Six of the top 10 overall brands based on engagement have a large presence in soccer: Emirates Airlines, Rakuten, Standard Chartered, Jeep, Chevrolet, and Beko are on jerseys of teams like Manchester United, Real Madrid, Juventus, and FC Barcelona. 2019's top brands tell a similar story -- apparel and jersey sponsors. Dream11's entrance into the top 10 brands for 2020 brings a betting brand and the sport of cricket.

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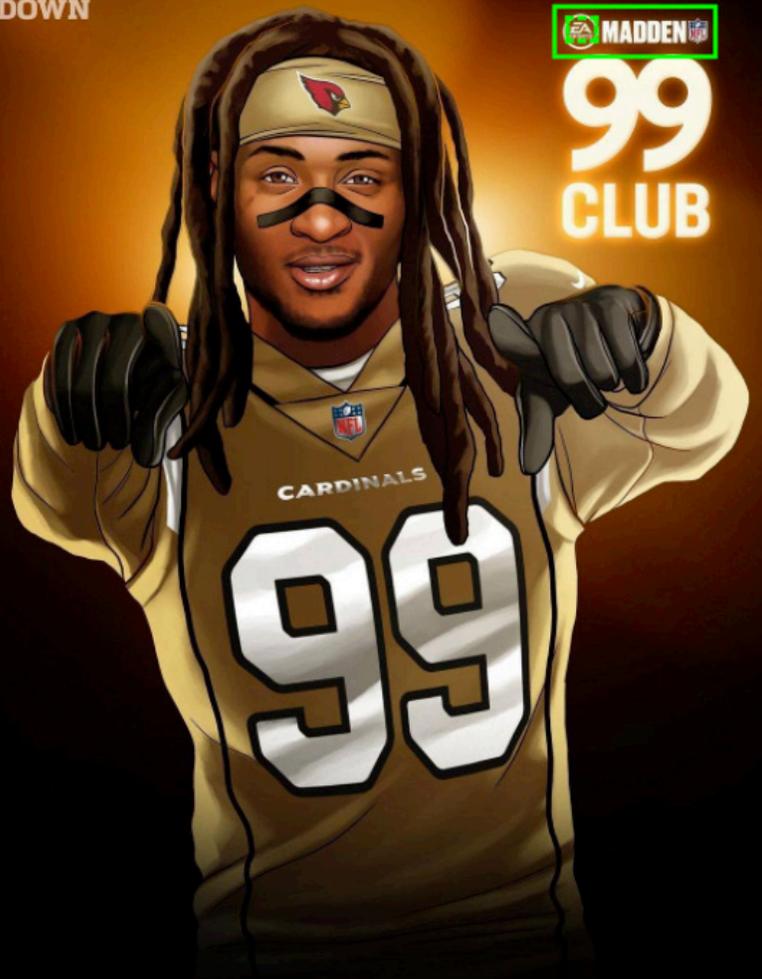
TOP 10 BRANDS ENGAGEMENT BY SPORT 2019 vs 2020

SOCCER

Compared to other sports where total brand engagement is tied to official league sponsors, **soccer's top brands are apparel & sporting goods makers (Nike, adidas, and Puma) and jersey sponsors of some of the top teams in the world.** One brand we wanted to call out - New Balance. The apparel maker and Liverpool deal ended in May of 2020, and the team now uses Nike, which is why New Balance was bumped from the top 10 list for 2020.



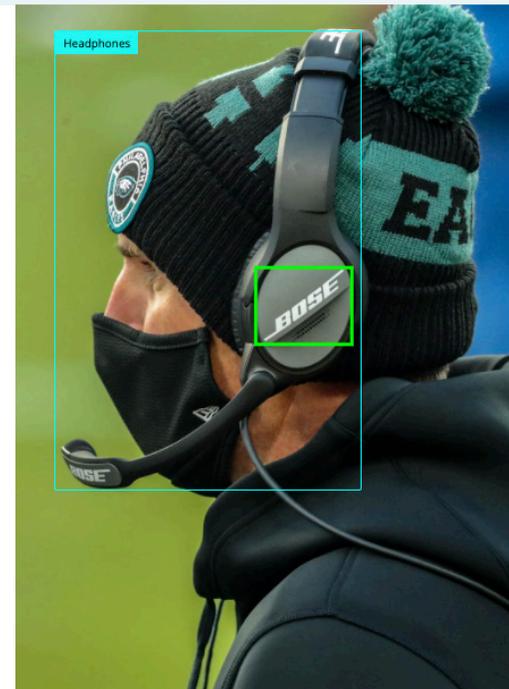
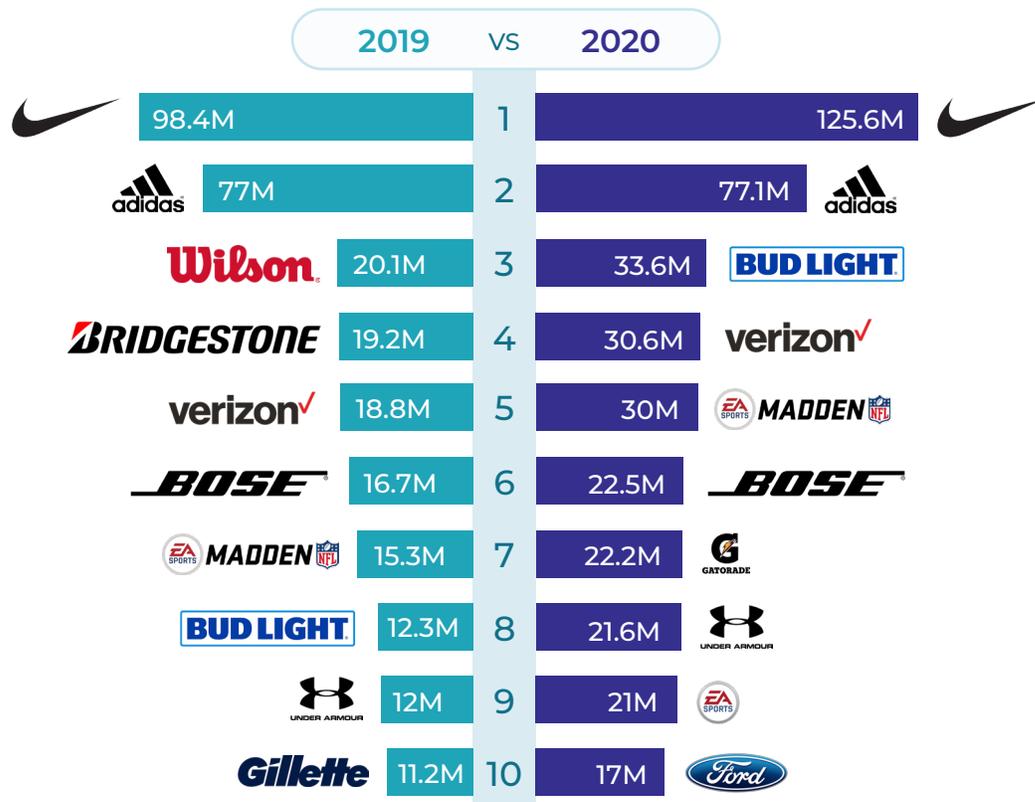
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MADDEN NFL
99 CLUB

AMERICAN FOOTBALL

Eight of the top 10 brands are NFL official sponsors: Nike, Bud Light, Verizon, Madden, Bose, Gatorade, EA Sports, and Ford. Madden and EA Sports' big moves into the top compared to 2019 are a direct result of the Madden NFL 99 Club campaign. Of the NFL's 10 most engaging branded posts in 2020, two of the 10 included EA Sports and Madden 99 Club introducing the newest members (and fan favorites) Deandre Hopkins and Patrick Mahomes. Bose receives valuable exposure -- game days posts of coaches wearing Bose headsets is a social media staple.



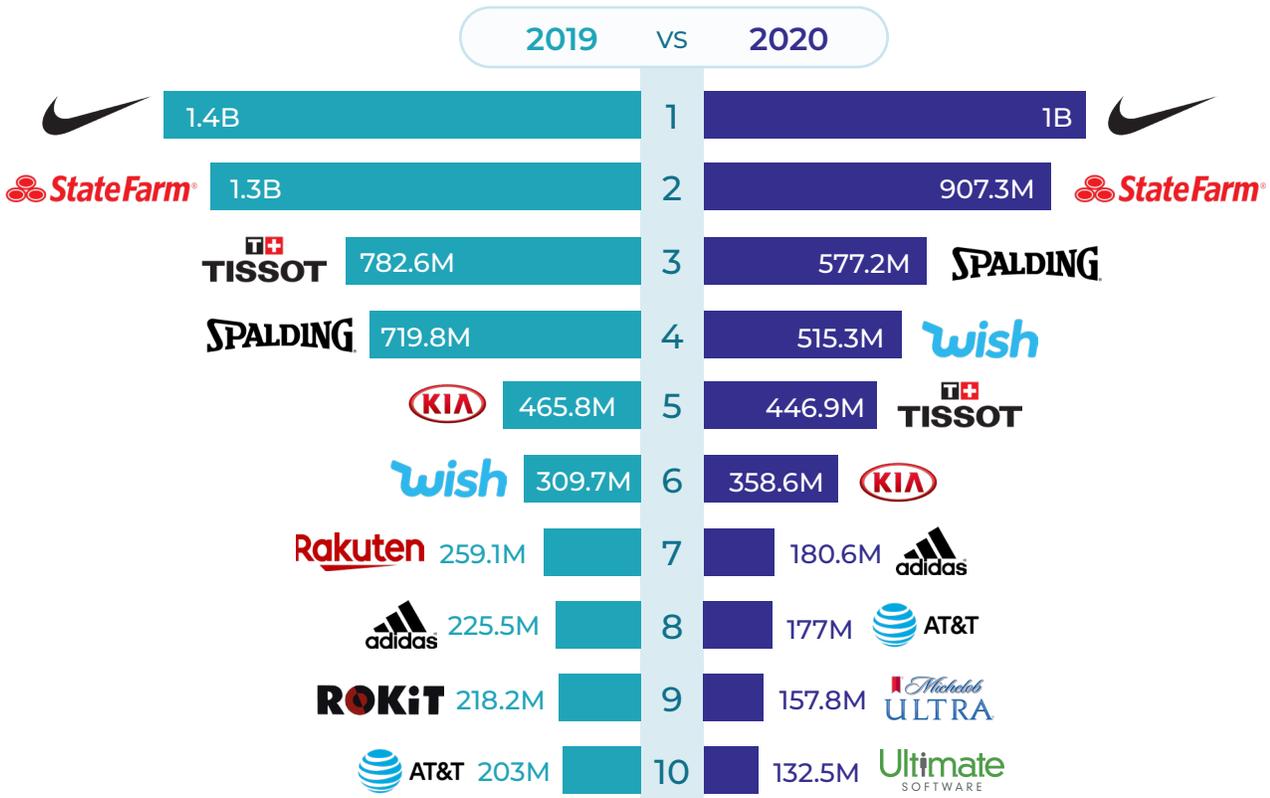
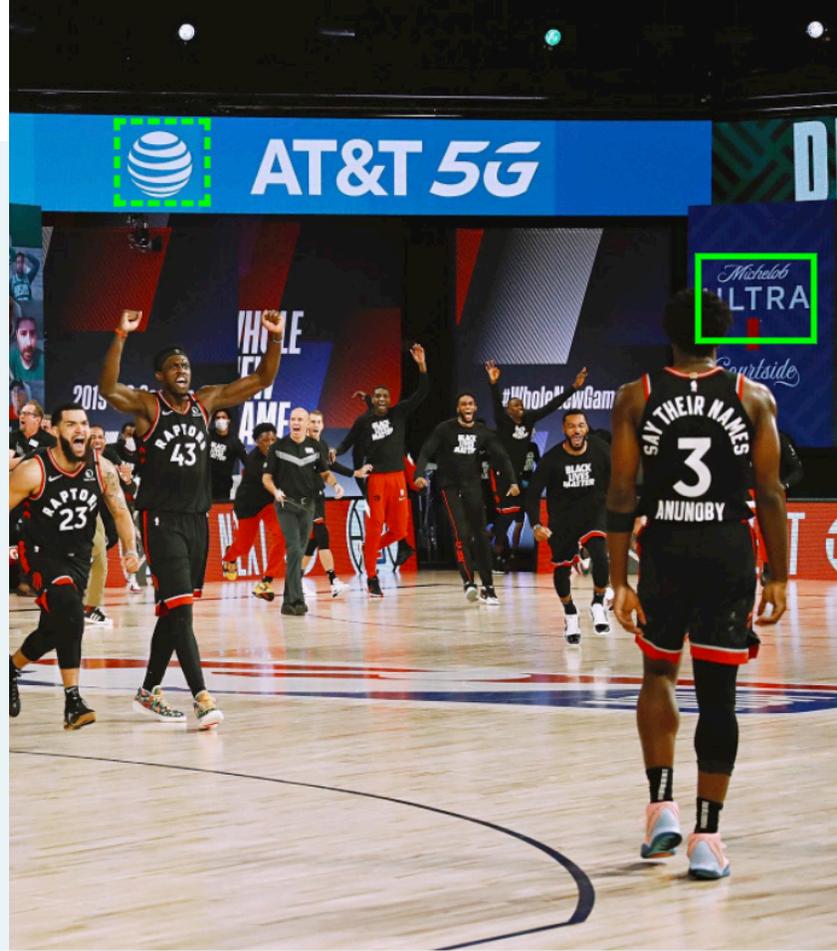
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BASKETBALL

Seven of the top 10 brands in 2020 are official NBA sponsors: **AT&T, Nike, State Farm, Spalding, Tissot, Kia,** and **Michelob Ultra**. Wish's climb to #5 from #7 (year-over-year engagement increase of more than 28%) is **highlighted by the Lakers' 2020 NBA Championship** plus the passing of Kobe Bryant saw many in memoriam jersey posts.

The Miami Heat's jersey patch partner **Ultimate Software** made the #10 spot in 2020, as the tech company earned engagement throughout the team's run to the NBA Finals. Michelob Ultra signed a multi-year deal with the NBA in July.

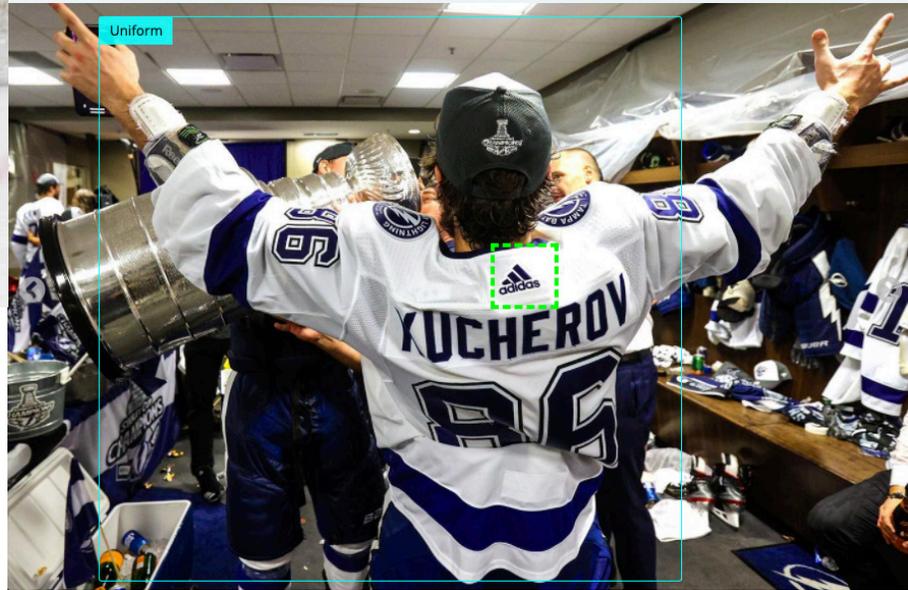
One brand that will most likely not appear in 2021's top 10 list - **Spalding**. The NBA and Spalding parted ways after the 2020 season, and the league will now use **Wilson** as the maker of its official game balls.



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HOCKEY

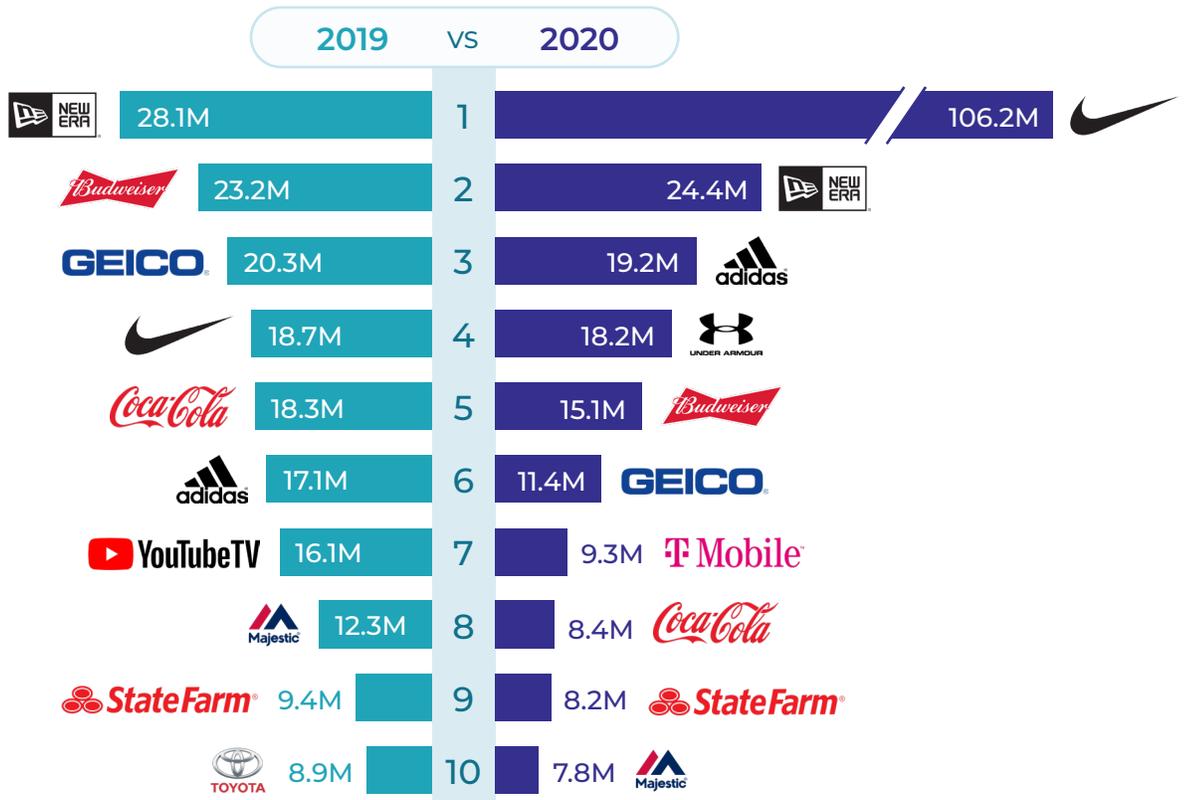
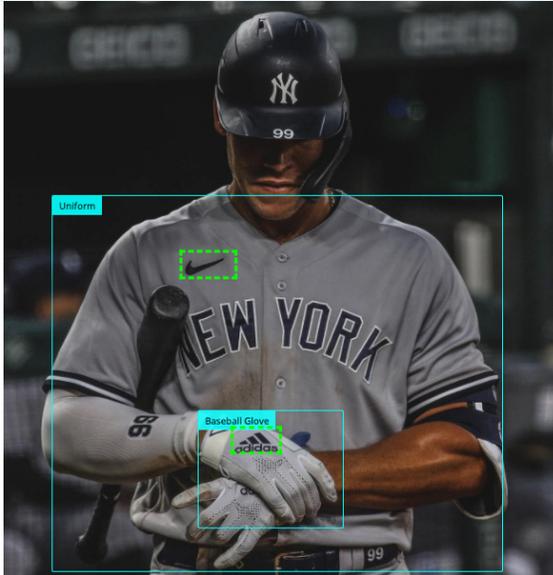
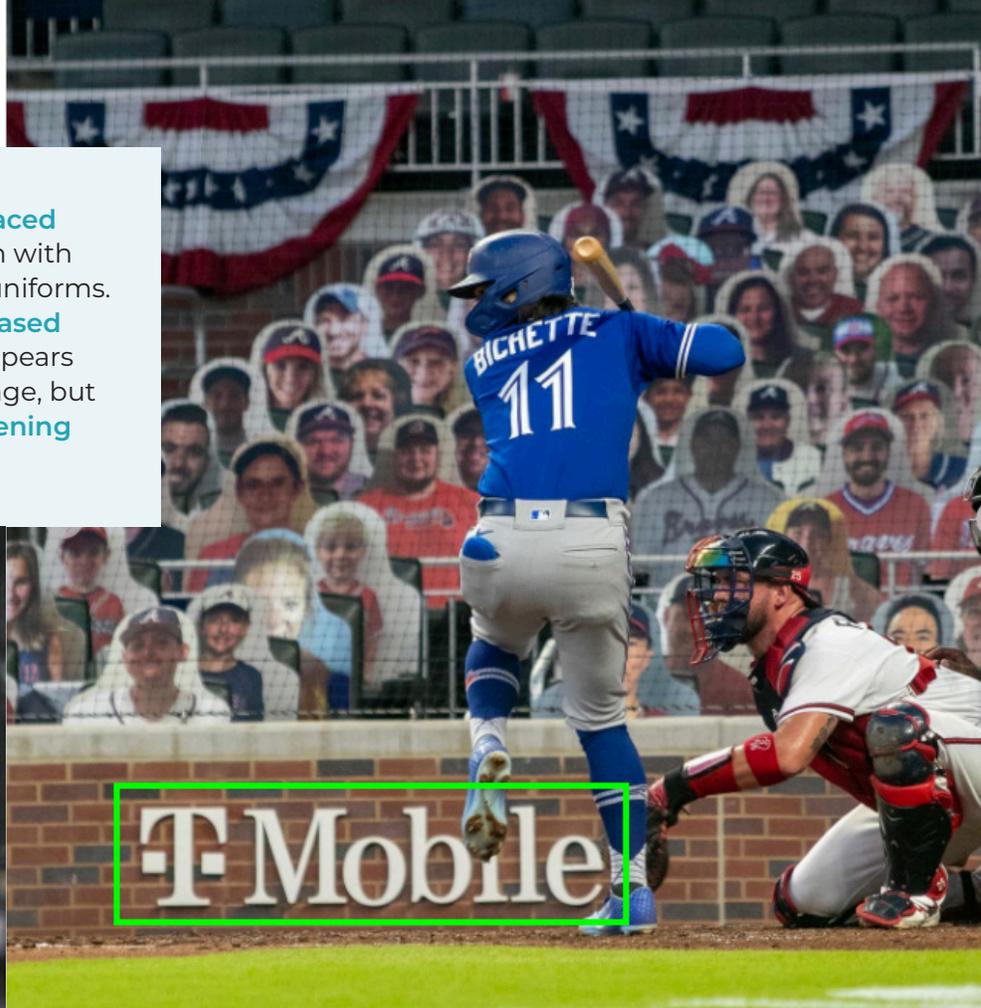
Nine of the top 10 brands (for both 2019 and 2020) are official sponsors of the NHL. Tim Hortons is in the top 10, as it's a partner of several NHL teams, including the Detroit Red Wings, New York Islanders, and Vancouver Canucks as well as Hockey Canada. **Bauer**, a sporting goods and apparel company, sees much of its exposure on hockey equipment like helmets, sticks, and pads, while **adidas** is the official apparel sponsor of the NHL.



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BASEBALL

At the start of the 2020 season, Nike replaced Majestic (and included their collaboration with New Era) as the official supplier for MLB uniforms. Nike's year-over-year engagement increased by more than 467%. T-Mobile not only appears on outfield and behind-home-plate signage, but also on MLB's social media assets like Opening Day, MLB Draft, and Home Run Derby.

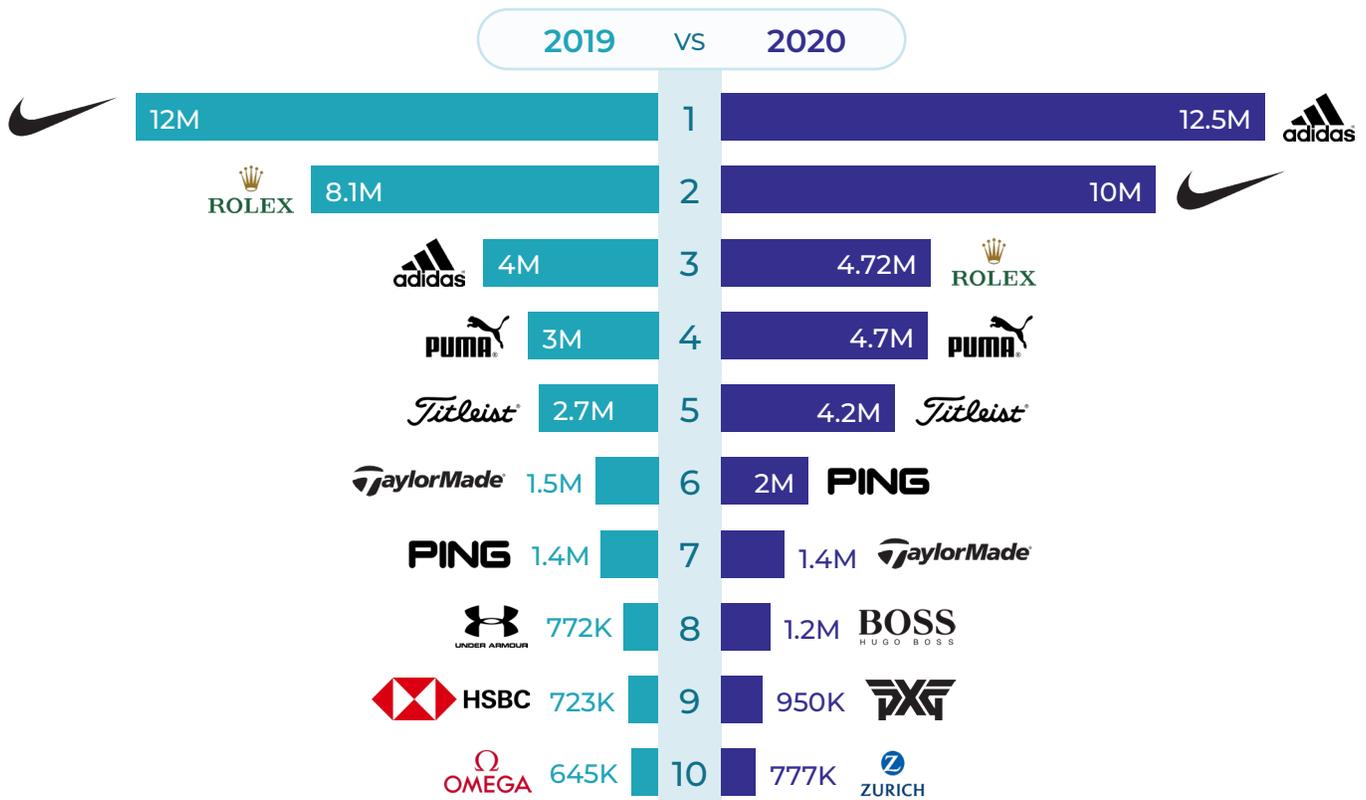


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GOLF

Reviewing the top 10 brands for 2019 and 2020, **three brand categories stand out: apparel & accessories, financial services, and insurance.** Golfers have sponsors across their hats, clothing, and golf bags, while brands like Titleist, Ping, and Taylormade are endemic to golf.



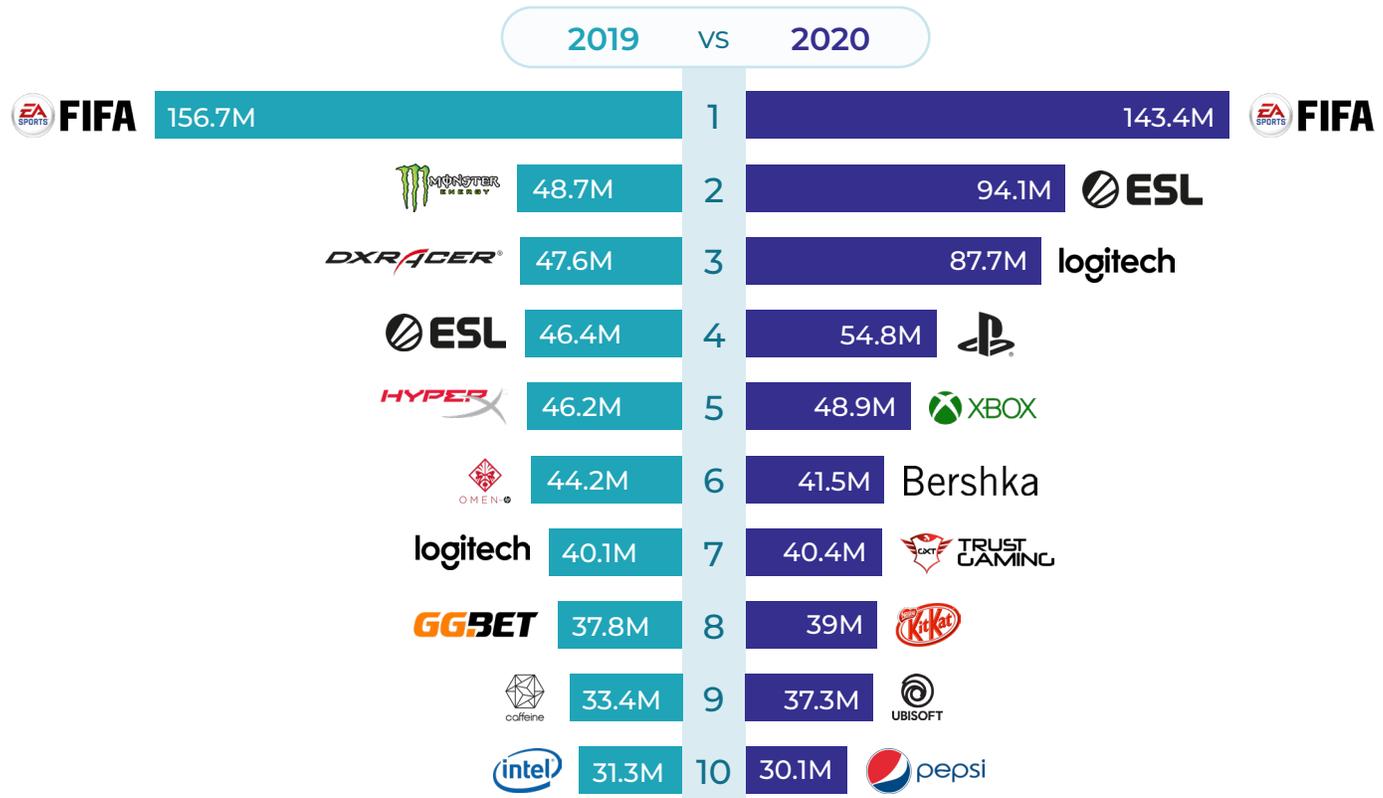
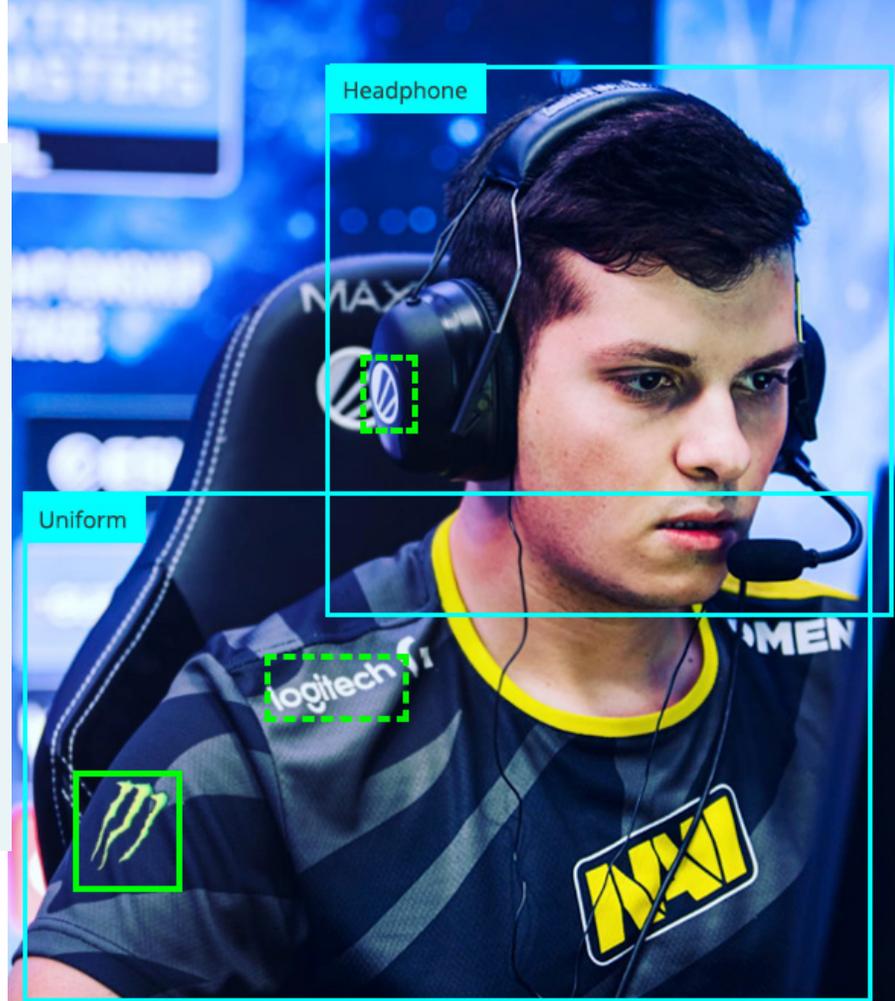
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ESPORTS

Consumer electronic brands lead the way in terms of esports exposure for both 2019 and 2020.

Logitech increased year-over-year engagement by more than 76%.

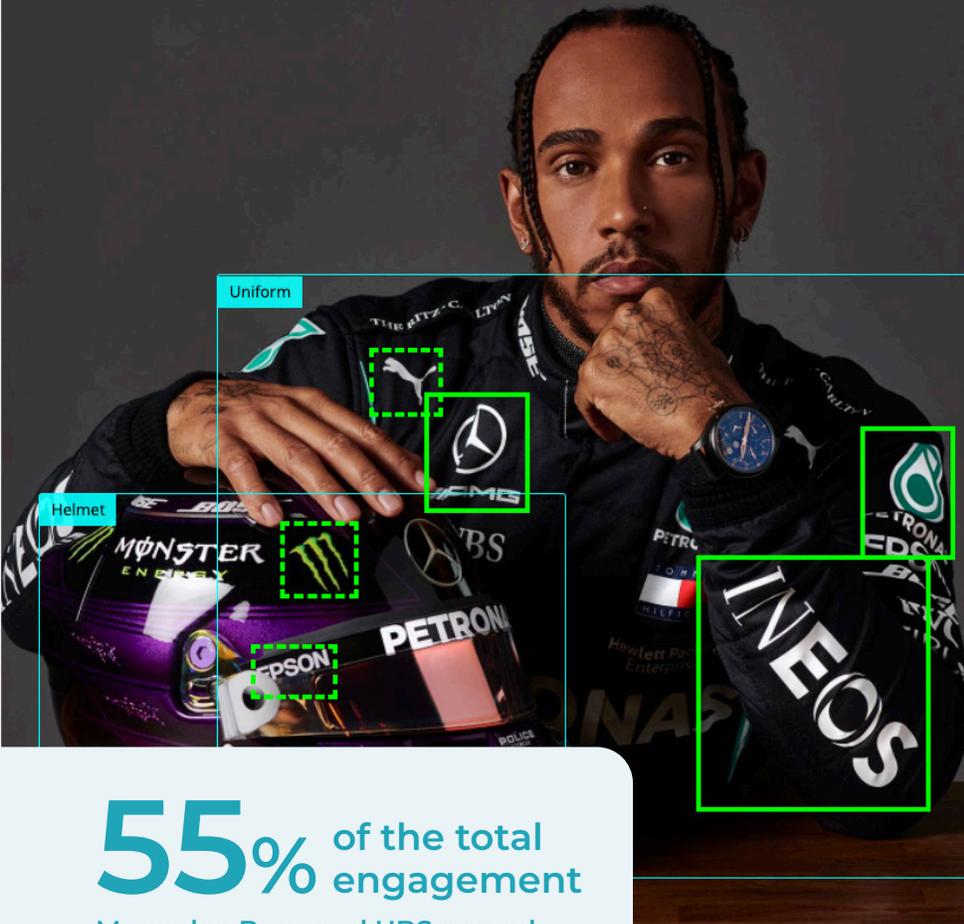
PlayStation entered 2020's top 10 -- the brand saw increased popularity with its release of PS5. With esports' rise in 2020, highlighted by a 56% increase in year-over-year engagement from the top 10 brands, it will be fascinating to see how its popularity continues and if more non-endemic brands partner with esports teams, leagues, and players.



*Based on data from January 1, 2019 - December 31, 2020

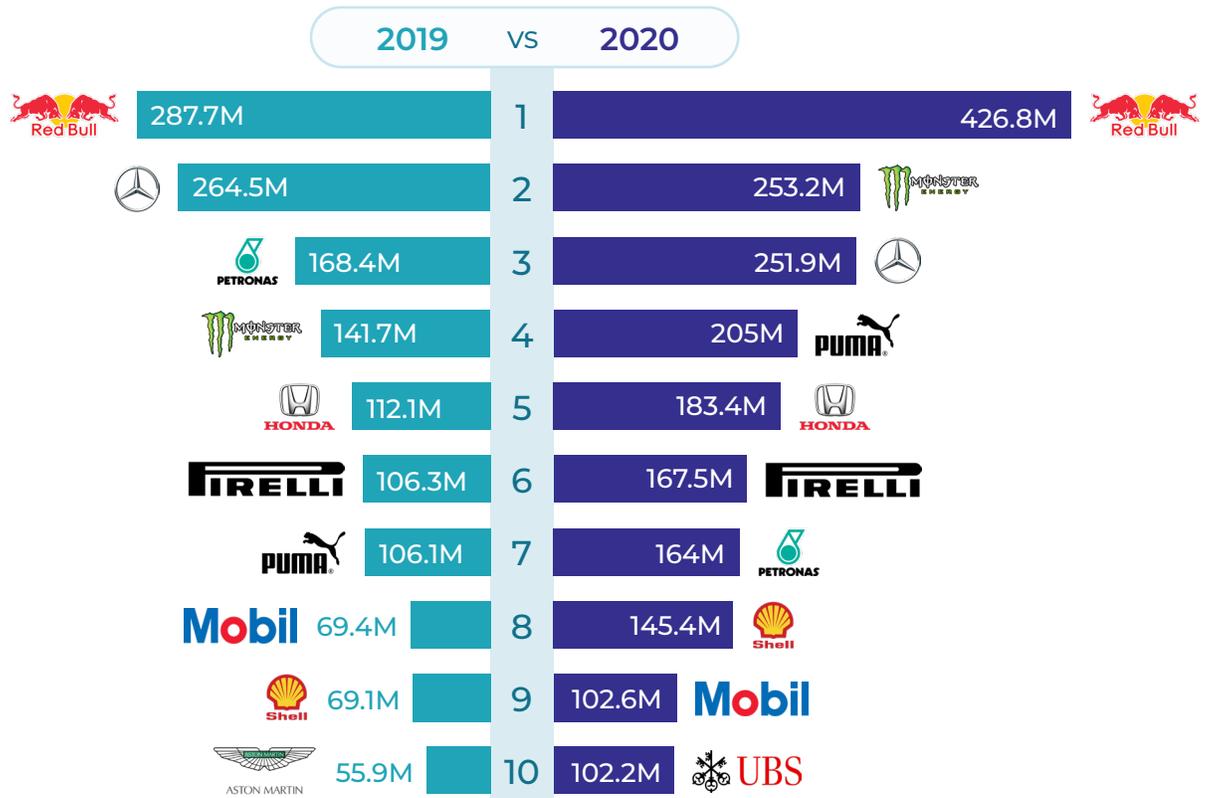
RACING

Forty-two percent of engagement from the top 10 racing brands in 2020 was driven by automotive (ex. Mercedes-Benz) and automotive aftermarket (ex. Pirelli) brands. **With more than 32.7 million followers on social media**, F1 has the largest racing audience and one of the most popular teams, Mercedes-AMG Petronas (plus racing legend Lewis Hamilton). **Six of the 10 brands, including Mercedes-Benz, Monster Energy Puma, Pirelli, Petronas, and UBS** are sponsors of the team and found on drivers' racing suits, cars, and helmets.

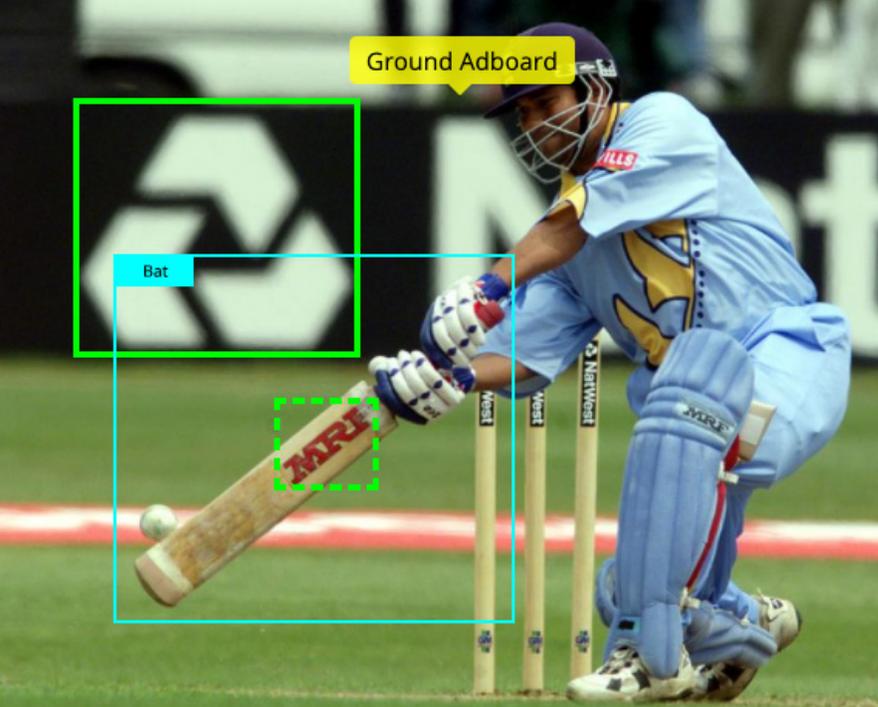


55% of the total engagement

Mercedes-Benz and UBS earned in 2020 was driven from the social channels of F1, Mercedes-AMG Petronas, and drivers.

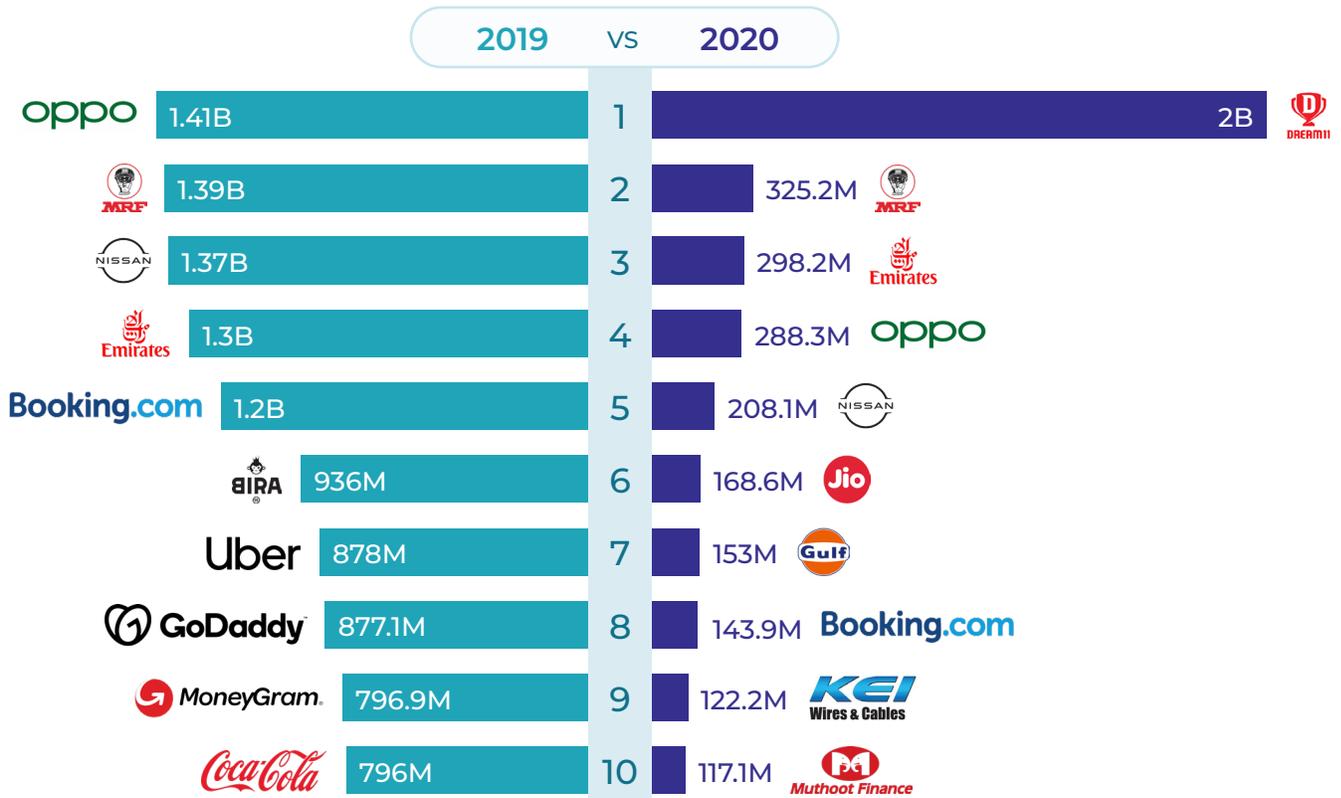


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CRICKET

Dream11 entered 2020's top 10 list. Not only did the Indian fantasy sports platform earn the most engagements, but it also saw **year-over-year valuation increase by more than 236%**. Dream11 became the Indian Premier League's Twenty20 title sponsor for the 2020 season (replacing Vivo). MRF Tyres held onto its #2 spot -- the automotive aftermarket brand is the bat sponsor for many cricket teams.

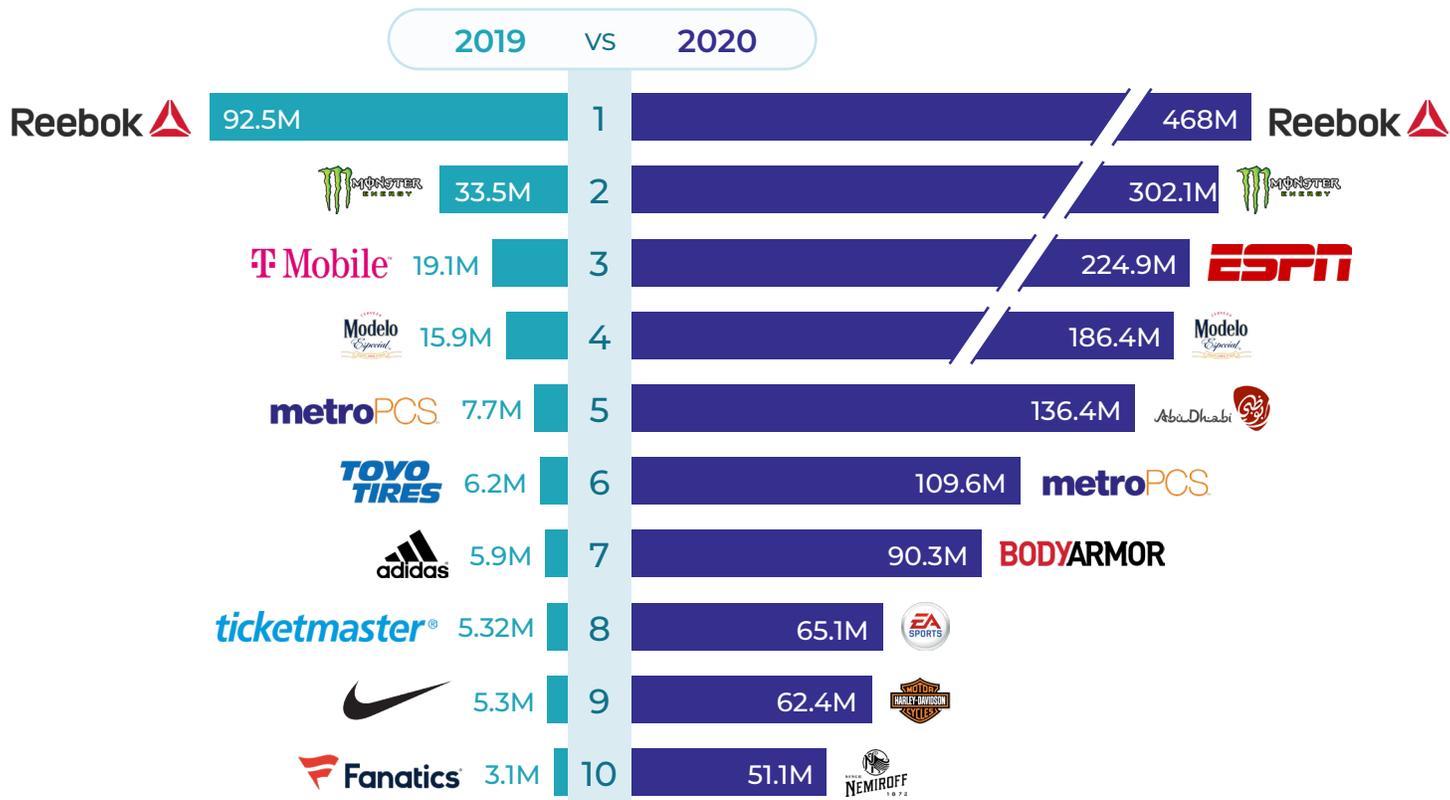


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MIXED MARTIAL ARTS

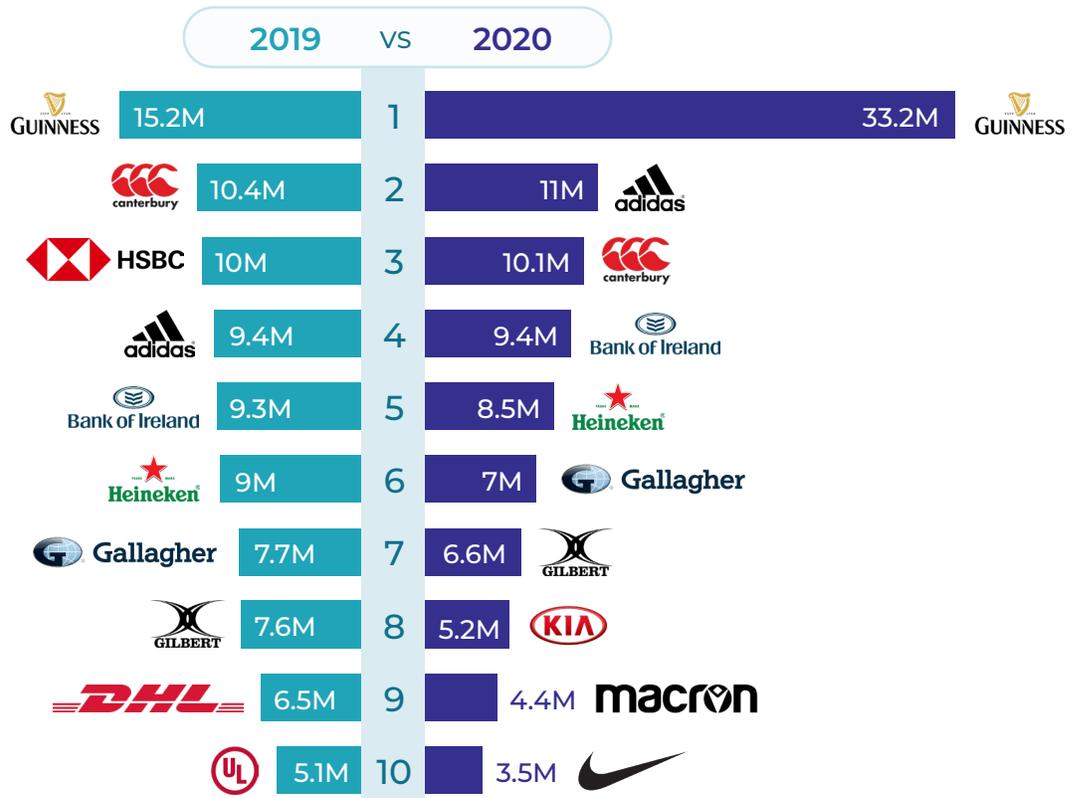
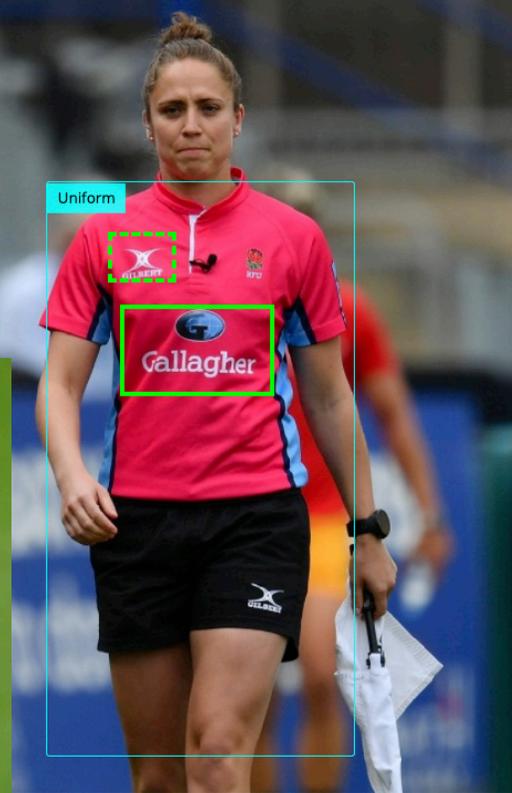
While there are numerous mixed martial arts (MMA) leagues and athletes, **the UFC stands as the most popular and engaging.** The league has **more than 75 million social media followers** across Facebook, Instagram, Twitter, TikTok, and YouTube plus global athletes. **The top 10 brands in 2020 are official sponsors of UFC.** These brands can be seen on athletes' clothing (Reebok), in the octagon (Monster Energy), and on step and repeats (Body Armor).



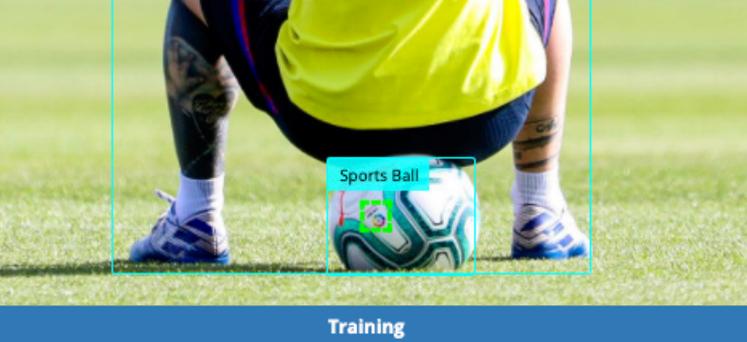
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RUGBY

Five of the top 10 rugby brands in 2020 are apparel makers and are found on uniforms for leagues like Guinness Pro14 and Premiership Rugby. The HSBC World Rugby Sevens Series was postponed in March because of the pandemic and then cancelled in June, which is why brands like DHL, UL and HSBC appear on 2019's list but not the 2020 list.



*Based on data from January 1, 2019 - December 31, 2020



Training

Blinkfire's BrandSpotter™ technology was created to not only track brands, but also scenes and assets.

What's a scene? **Scenes are images -- specific pieces of social media content like a birthday post, line up graphic, or game preview.** Most rights holders create scenes that they use throughout a season, and those scenes drive value and engagement for brand partners whether by active or passive exposure. **Assets are tracked in video and images. Examples include: uniform, adboard, shoe, headphones, sports ball, and press table.**

Branded content means brands are recognized visually (by BrandSpotter™), @mention, official hashtag, and/or tagged content.

SCENES & ASSETS

TOP BRANDED SCENES 2019 vs 2020

BY ENGAGEMENT EARNED

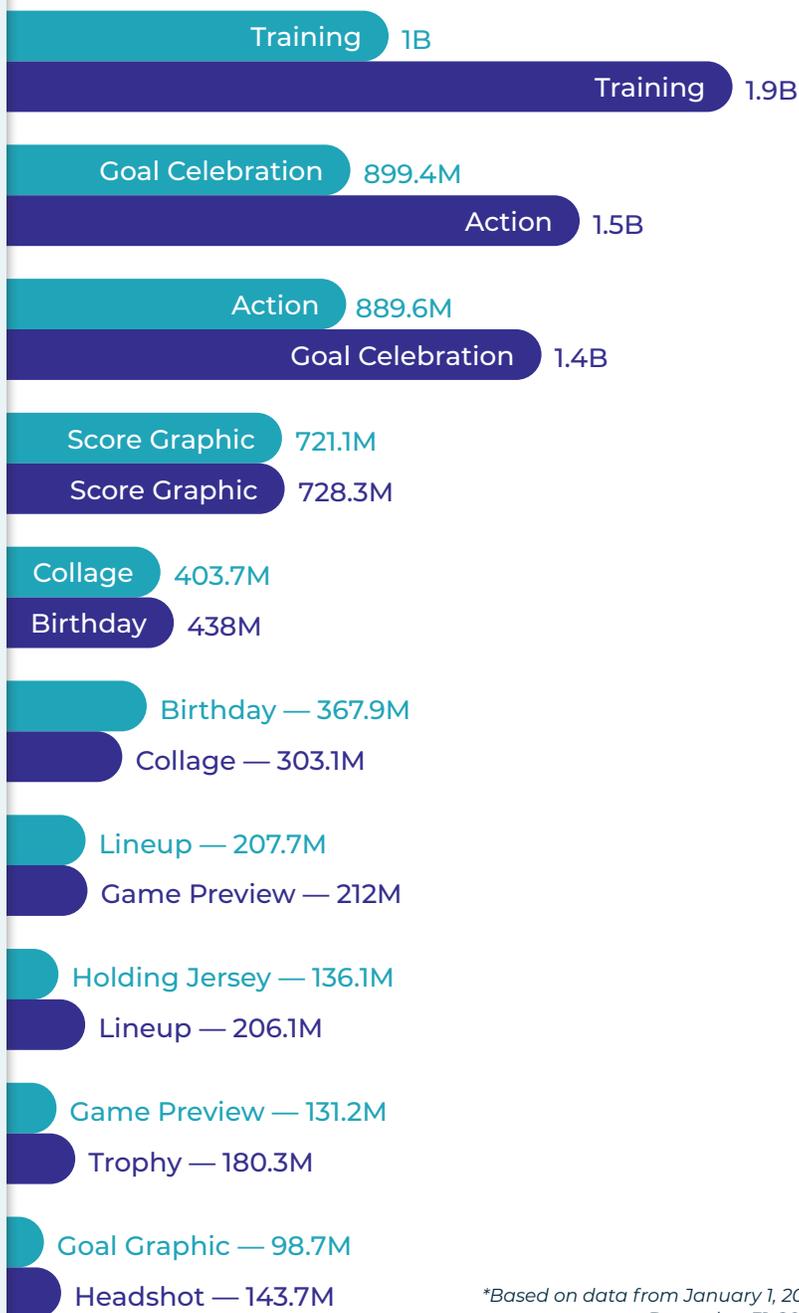
Blinkfire has more than 40 scene types in our platform ranging from action and training to travel and man of the match. The list below includes the top scenes where a brand was present based on total engagement earned.

A few branded scenes we wanted to highlight:

Training scene engagement **increased more than 87%** in 2020 compared to 2019.



Birthday scene engagement **increased 19%** in 2020 compared to 2019. Birthday scenes, one of the most engaging pieces of content for teams, **averaged 13.2K engagements per post.** Rights holders are partnering with beer, candy, or donut brands to sponsor birthday posts.



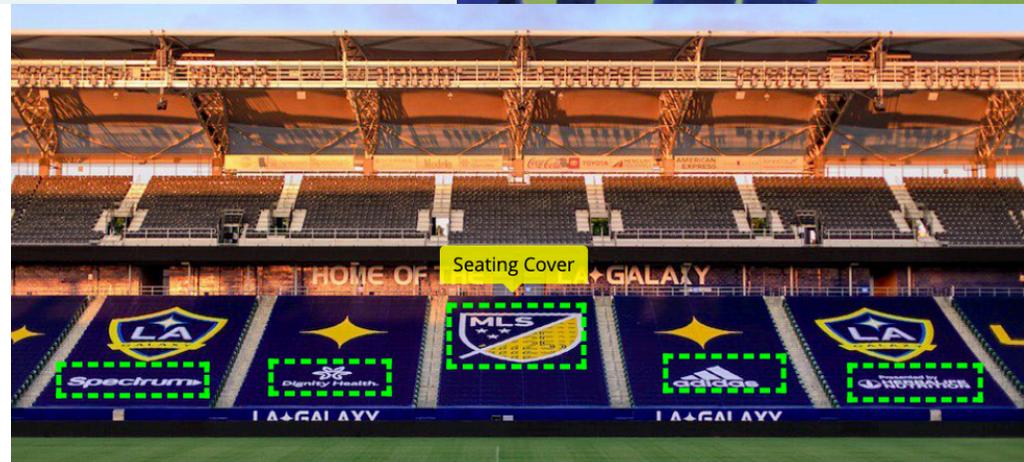
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2020 TOP BRANDED ASSETS

Blinkfire tracks more than 60 assets across 40 plus sports in videos and images. Some assets are specific to certain sports, including press table (basketball) and dasher board (hockey). The chart below shows the top 10 branded assets based on the number of posts in which they appear. **Uniform is the top branded asset**, as most jerseys, whether game or training, include a brand. **Seat covers were a new asset in 2020 because of COVID-19**, with sports like soccer, baseball, football, and basketball using them for sponsorship exposure.

- 1 **UNIFORM**
1.3M POSTS
- 2 **GROUND ADBOARD**
143K POSTS
- 3 **STEP & REPEAT**
105K POSTS
- 4 **MEZZANINE ADBOARD**
12.7K POSTS
- 5 **DASHER BOARD**
12.1K POSTS
- 6 **SEAT COVER**
9.9K POSTS
- 7 **SPORTS BALL**
7.2K POSTS
- 8 **BROADCAST LOGO BUG**
6K POSTS
- 9 **HELMET**
4.2K POSTS
- 10 **F1 CAR**
3.7K POSTS

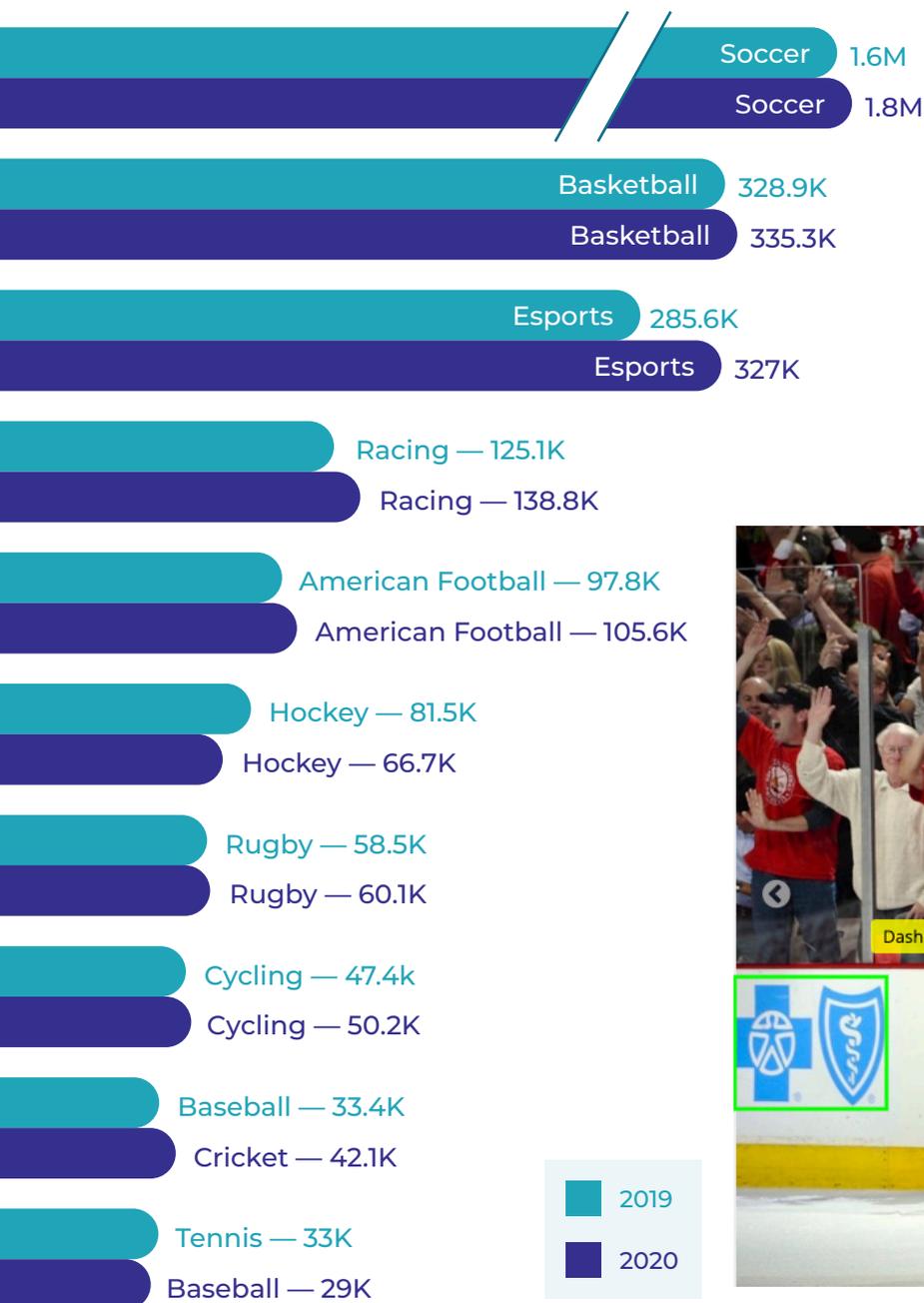


*Based on data from January 1 - December 31, 2020

BRANDED POSTS BY SPORT 2019 vs 2020

As we talked about at the beginning of the report, we track more soccer, basketball, esports, and american football compared to other sports. Racing and cycling are a smaller percentage of posts in our platform, but brand exposure is abundant. Drivers and cyclists have multiple brands on uniforms, suits, cars, and bikes.

Soccer makes up 43% of the posts in our platform, and the sport takes the top spot with 1.8 million branded posts in 2020. The number of esports branded posts increased by 14.5% in 2020. Tennis saw a shorter season in 2020 due to the pandemic and the cancellation of tournaments (including Wimbledon).



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BRANDS – POST, SPORT, & PLATFORM

AVERAGE NUMBER OF BRANDS PRESENT IN A POST

As we've seen over the last few years, fans and audiences relate and engage with authentic content. Throughout 2020's dataset, we found a compelling insight: the average number of brands in a post was 1.6, while the average number of brands receiving exposure by an @mention, hashtag, or tag was well under one, at .11. Visual brand exposure, whether passive or active, is the content strategy rights holders are embracing to drive brand value.

1.6
Average # of brands per post
(in 2020)



BY SPORT

Looking at 2020's average number of brands per post by sport, the majority of the sports in the top 10 consistently have brands in their social media posts. Cycling includes brands on bikes, uniforms, and step and repeats, while mixed martial arts has brands on the athletes' clothing and in the octagon. Basketball receives a boost because of the Euroleague where multiple brands appear on the players' uniforms and court sponsors are on more assets compared to the NBA.



Triathlon		2.5
Cycling		2.03
MMA		2.02
Hockey		2.01
Soccer		1.95
Karate		1.92
Cricket		1.85
Handball		1.8
Basketball		1.76
Lacrosse		1.7

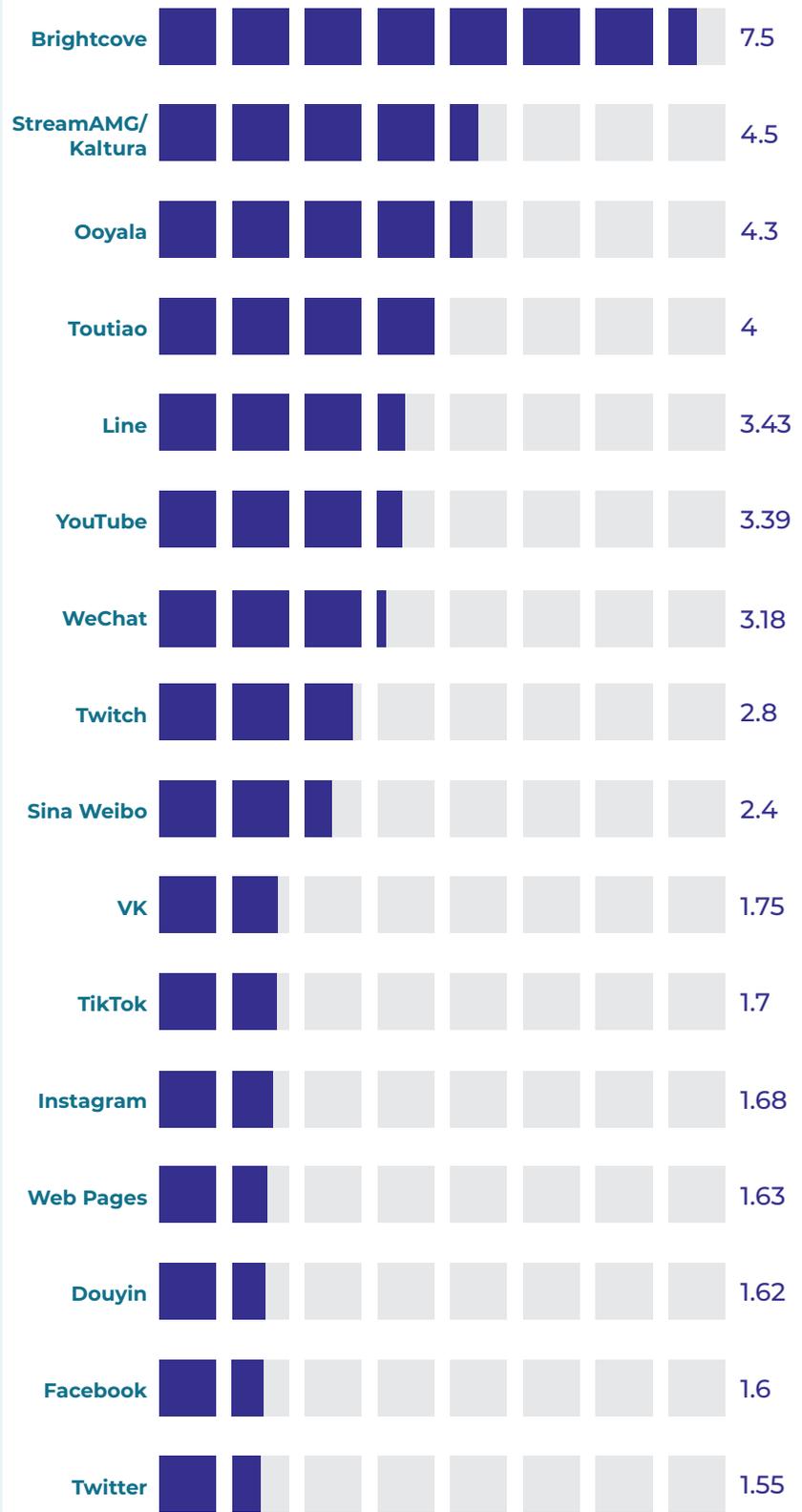
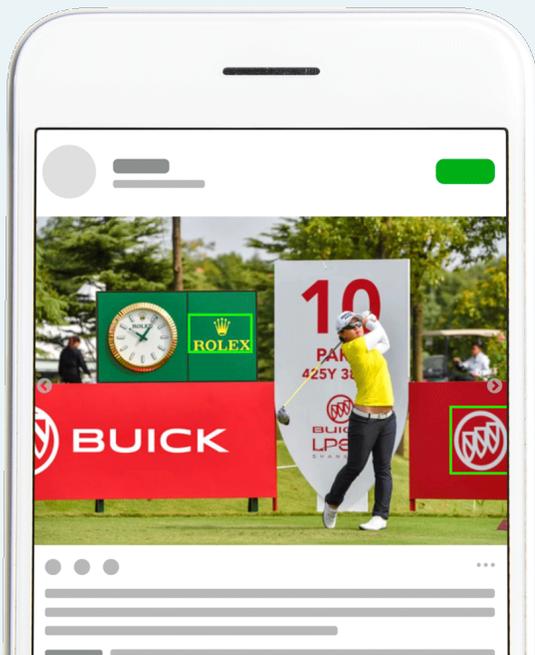
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BRANDS BY PLATFORM

Average Brand Exposure Per Post

Blinkfire stays up-to-date with social media, digital, and OTT platforms. **This year we added Toutiao, Line, TikTok, and Douyin.** With more channels than ever before for rights holders to publish content, we wanted to understand how average brand exposure per post compares across platforms.

- 1 As a rights holder, if you're not tracking (or using) Advanced TV and digital, **you're missing out on brand exposure.**
- 2 Asian networks like Toutiao, Line, and WeChat offer rights holders a way to engage with a large audience. If you're a team and haven't started using these platforms, **you're leaving out valuable brand engagement.**
- 3 **Twitter and Facebook make up more than 90% of the posts in Blinkfire** and continue to be a highly used social media platform, **but brand exposure puts these two at the very bottom.** PSA: Twitter and Facebook serve a purpose for specific social content but using other platforms and creating new ways to engage with fans is key.



*Based on data from January 1 - December 31, 2020