



PLAYFLY

FANSCORE

POWERED BY  VISION INSIGHTS

NBA
EDITION

2024

MEET PLAYFLY INSIGHTS

Playfly Insights is a leading provider of thought leadership, fan data, and insights in the sports, technology and media industries. We utilize a consultative data-driven approach to reach, engage, monetize, and measure fandom to give our partners a competitive advantage. We compile and produce full-scope analytics and studies, as brands and partners alike seek to share their stories. Both inside and outside the sports industry, clients look to Playfly to understand what makes fans tick. From consumer buying habits to value and motivators, **we know fandom.**

Decision-makers in lockerrooms, boardrooms, and newsrooms leverage our data insights to uncover fan trends, preferences, and behaviors. Our data and analysis help them better understand the sports fandom landscape and deliver on business objectives. Increase brand awareness, maximize ROAS, activate new audiences, and more with custom research and studies from Playfly Insights.

Reach out to Playfly Insights today at playflyinsights@playfly.com to get your own custom study.

FANDOM AS A SERVICE



WE BELIEVE

...THAT FANS ARE AT THE CENTER OF EVERYTHING WE DO

AND THAT THE ONLY WAY TO UNDERSTAND THE CONSTANT EVOLUTION IS THROUGH DATA EXPERTISE

MOST COMMONLY REQUESTED STUDIES

Want to learn more about your fans with actionable data? Reach out to Playfly Insights today!

CUSTOM RESEARCH STUDIES

- Fan Satisfaction Study
- Pricing Analysis (e.g., Yield Management, Venue Rescaling, New Inventory)
- Donor, Premium, and Season Ticket Analysis
- TV Visible Signage Assessment
- Recruiting & Retention Study
- Custom Forever Fan Study

FAN SEGMENTATION STUDY

Playfly Insights will help you identify your specific and custom fan segments based on fan behavior and preferences, allowing you to target and activate these segments differently (e.g., ticketing, donations, marketing).

ALWAYS-ON™ FAN INSIGHTS

Take a deeper dive into fan profiles with your own annual license to Vision Insights' Decoder media valuation product, plus get actionable data analysis and reporting from Playfly Insights.



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01. THE NBA STANDS APART

The National Basketball Association (NBA) is a powerhouse of entertainment in the realm of professional sports. A fusion of premier athletes, dramatic storylines, and a rich history, the Association stands apart for its cultural impact and global reach. Its dynamic product evolved through the decades, marked by iconic legends who shaped the game with their personalities as much as their play style; from Bill Russell and his dominant defense to Michael Jordan's smooth flow to Steph Curry's perfect shooting form.

Over the last decade, the NBA underwent a metamorphosis fueled by three-point barrages, an infusion of international talent, and a positionless style that favors high-octane, playmaking stars. Today's outspoken and charismatic players resonate with an increasingly diverse and younger fanbase, wielding influence that extends far beyond the hardwood and into the very fabric of our culture.

- The Association has the highest percentage of fans under 44 years old.**
- Fans are diverse, 40% of NBA fans are non-white.**
- ✕ The hottest stars hail from Serbia, Greece, France, Cameroon, and beyond, further solidifying the NBA's global presence.**
- ↳ Of the 573 million users who follow the top 10 American athletes on social, 81% are following NBA stars.**

With its global appeal, diversity, and social prowess, the NBA has clearly separated itself as the most progressive and forward-thinking sports league in America and solidified its status as a truly global phenomenon.

In this NBA Edition of our Playfly Sports FanScore report, we embark on a journey to explore the current state of the league, delve into fans' outlook on the future of the sport, examine the unique qualities that set the NBA apart, and unlock the secrets to cultivating the most valuable NBA fan of all: the Forever Fan.

THE NBA IS A STAR-POWERED LEAGUE

For the NBA, we group the decades by the superstars who defined their generation:

Bill Russell and Wilt Chamberlain

Kareem Abdul-Jabbar

Magic Johnson and Larry Bird

Michael Jordan

Kobe Bryant

Lebron James and Steph Curry

This star power drives the NBA's fandom. According to research

conducted by Playfly Insights, the NBA has the highest percentage of fans who claim, "I like to follow my favorite athletes in a given sport, no matter what team they play for."

The NBA actively promotes the outsized personalities and compelling storylines from its biggest stars, reinforcing the star power that drives fans to follow the sport. What's more, today's stars transcend the hardwood with greater cultural influence than their predecessors through social media and off-court brand building.

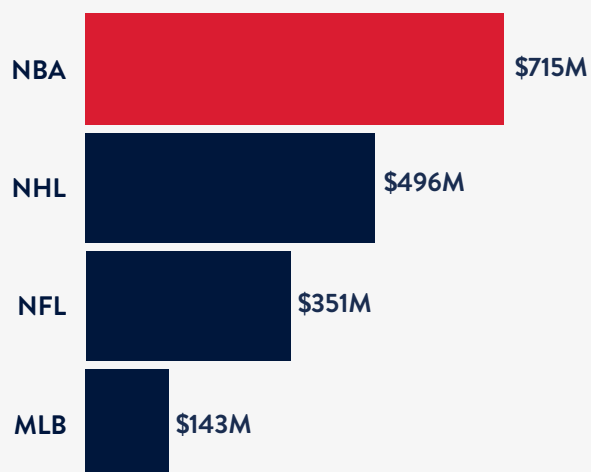


NBA'S GLOBAL DOMINANCE

Basketball is an international sport second only to soccer, far ahead of MLB and the NFL, globally. Michael Jordan made the NBA hugely popular worldwide in the 1990s, exposing the league to new global audiences. Yao Ming then tapped into the enormous Chinese market in the 2000s, attracting hundreds of millions of new Chinese fans. Thanks to these superstars' unique talents and global appeal, the NBA established basketball's worldwide popularity and profitability decades ago.

Since then, the NBA's popularity abroad blossomed. The Association's international media rights value is top amongst the big four American sports, surpassing the second-place NHL by more than \$200M.

VALUE OF MEN'S MAJOR LEAGUES TV RIGHTS OUTSIDE THE USA



SOURCE: Ampere Analysis

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This global appeal translates to an upswell of foreign-born talent. A record 125 international players from 40 countries were on opening night rosters this season, including superstars Nikola Jokić of Serbia and Giannis Antetokounmpo of Greece, as well as the number one draft pick, the San Antonio Spurs' Victor Wembanyama of France.

WHO'S NEXT

The NBA is entering a transitional "who's next?" moment. The league has always been defined by its marquee players, from Bill Russell to Michael Jordan. Now, as the current crop of superstars like LeBron James and Steph Curry edge closer to retirement, the NBA will look to a new generation of talent to carry the mantle. Considering the league's global presence and the sports international popularity, the next face of the NBA will likely be foreign-born.





02. STATE OF THE LEAGUE

NBA'S POSITIVE OUTLOOK DRIVEN BY YOUTH

Our team at Playfly Insights, in partnership with Vision Insights, wanted to gauge fan sentiment at this pivotal point in NBA history. Before the 2023-2024 season tipoff, we polled NBA fans to understand where the league is headed. We found all fans across generations, particularly those among 35-44 years old, feel the NBA is headed in the right direction.

IN WHAT DIRECTION DO YOU THINK THE NBA HAS SHIFTED OVER THE PAST FEW YEARS?

	Negative	Positive	Positivity Index
13-24	12%	37%	299
25-34	13%	40%	314
35-44	9%	41%	454
45-54	13%	32%	243
55-64	18%	28%	157
65+	17%	25%	145

SOURCE: Playfly Insights and Vision Insights Custom Study, SEP. 2023.



Several key factors are driving this positivity:

1

A new generation of superstar talents like Giannis Antetokounmpo, Luka Doncic, and Jalen Brunson, who are injecting more athleticism, offense, and general excitement into games. This offensive creativity translates to more energized, high-entertainment value contests tailored to younger audiences.

2

Scoring is up. Teams averaged 115 points per 100 possessions last season, a steady increase over the previous two seasons. This is simply a small piece of a larger scoring trend powered by freedom of movement rule changes, three-point barrages, and individual scoring explosions.

**NBA-WIDE OFFENSIVE
STATS 2019-2023**

	2019-2020	2021-2022	2022-2023
Points Per 100 Possessions	110.6	112.0	114.8
eFG%	52.9%	53.8%	54.5%
3PT%	35.8%	35.4%	36.1%

SOURCE: Basketball Reference, NBA League Averages - Per 100 Possessions

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3

Basketball is the most popular sport to play recreationally in America today.

53%

of **NBA** fans played basketball as a child.

44%

of **MLB** fans played baseball as a child.

32%

of **NFL** fans played football as a child.

4

Attendance is at an all-time high. Average attendance across the country broke 18,000 for the first time in league history.



5

NBA teams are elevating live game experiences from simply viewing events into immersive and interactive events for fans of all ages. More than great sightlines and easy access to concessions, arenas are incorporating new and different ways for fans to enjoy the game from premium lounges to frictionless checkout at concession stands.

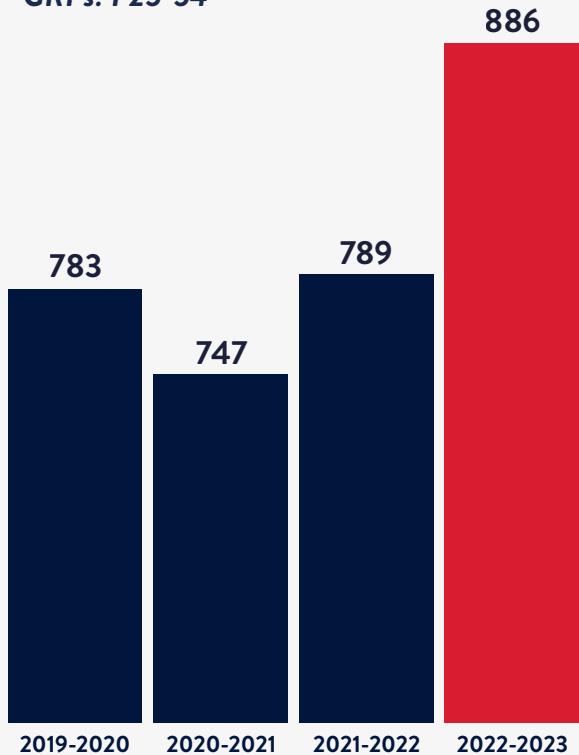


6

NBA TV Ratings are growing. Last season, NBA gross rating points (GRPs) for adults 25-54 across regular season national and local telecasts totaled 886, a 10% increase over the previous season.

TOTAL NBA REGULAR SEASON

GRPs: P25-54



Source: Nielsen, Live + SD, Persons 25-54 Gross Rating Points, 2019/20 - 2022/23 NBA Season.



LOCAL REGULAR SEASON BROADCASTS DRIVE VIEWERSHIP

While today's NBA viewership doesn't compare to the heyday of the Jordan era, it's still outperforming its competition, especially at the local level on regional broadcasts. Fueled by local enthusiasm, large and small market teams alike are the top primetime draw week in and week out.

DMA AVERAGE HOUSEHOLD IMPRESSIONS

 SAN FRANCISCO DESIGNATED MARKET AREA		 BOSTON DESIGNATED MARKET AREA		 PHOENIX DESIGNATED MARKET AREA	
WARRIORS - NSBA	116,450	CELTICS - NSBO	106,797	SUNS - KTVK/KPHE	83,910
KGO - ABC	47,680	WBZ - CBS	79,210	KTVK - IND	36,602
KTVU - FOX	35,672	WCVB - ABC	60,421	KNXV - ABC	35,496
KNTV - NBC	35,392	WBTS - NBC	38,597	KPNX - NBC	31,798
KPIX - CBS	34,541	NSBO	30,988	KPHO - CBS	31,786
NSBA	24,110	WHDH - IND	30,719	KSAZ - FOX	31,232
MSNBC	17,768	WFXT - FOX	29,988	KTVW - UNI	19,711
ESPN	16,408	FXNC	25,815	FXNC	19,480
KDTV - UNI	15,117	NESN	21,617	ESPN	18,093
TNT	12,747	WBPX - ION	20,403	KTAZ - TEL	14,844
 CLEVELAND DESIGNATED MARKET AREA		 SALT LAKE CITY DESIGNATED MARKET AREA		 MILWAUKEE DESIGNATED MARKET AREA	
CAVALIERS - FOHA	52,266	JAZZ - KJZZ	44,172	BUCKS - FWIA	42,702
WOIO - CBS	51,086	KSL - NBC	23,746	WISN - ABC	34,509
WKYC - NBC	40,319	KUTV - CBS	22,571	WTMJ - NBC	31,203
WEWS - ABC	37,156	KTVK - ABC	16,721	WITI - FOX	25,170
WJW - FOX	31,395	KTSU - FOX	15,358	WDJT - CBS	23,509
FXNC	22,163	KJZZ - IND	12,937	FWIA	11,091
FOHA	15,937	ESPN	10,265	WBME - MET	8,269
WVPX - ION	15,094	FXNC	9,935	ESPN	7,832
MSNBC	14,762	HGTV	5,173	FXNC	7,514
ESPN	14,487	HALL	4,204	HALL	5,229

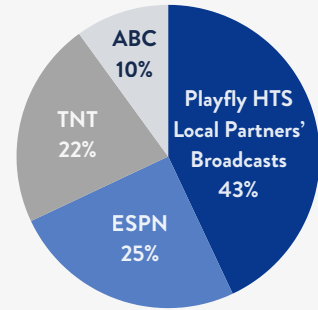
SOURCE: Nielsen NSI, Live+SD, TV Household Impressions. Tables Contain Home Team Sports Regular Season 2023-24 Games that Aired in Primetime (M-Sun 7-11p) vs Time Period Average for Competition.



What's more, local broadcasts are home to nearly half of all NBA regular season viewing. We aggregated gross rating points (GRPs) across networks and found local broadcasts held a 43% share of GRPs through the 2023-2024 All-Star Break.

2023-24 REGULAR SEASON % SHARE OF GRPs THROUGH ALL-STAR BREAK

Source: Nielsen (Npower Ratings Analysis), NBA, 10/24/2023 - 02/18/2024 Nielsen NSI LSD Projected to HTS Estimated Coverage Universe, P25-54.



LOCAL STARPOWER

Starpower is magnified at the local level where superstars and rising stars alike carry hero status with fanbases. Whether it's a number one draft pick saving the franchise or a superstar returning to his hometown to bring a championship home, local stars have the ability to create cultural and economic impact, and increased ratings, in cities across the country, regardless of the wins column.





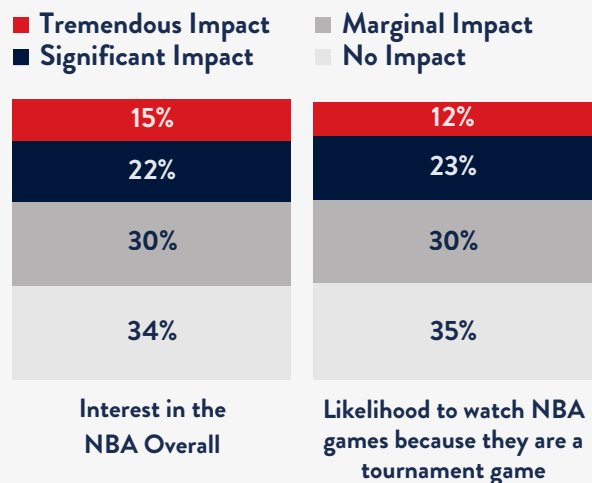
IN-SEASON TOURNAMENT

This season, the league took a calculated risk with a new concept; unleashing the inaugural in-season tournament. Banking on the positive equity built with fans over the years, league officials devised a multi-stage tournament to engage viewers and increase the excitement for the regular season.

Our team at Playfly Insights polled NBA fans before the tournament tipped off to gauge their sentiment. Was this something fans even wanted to watch? Would the tournament have an impact on fan behavior, or would it be viewed as a PR stunt to generate revenue?

The NBA did a great job marketing and hyping the tournament.

TO WHAT EXTENT DO YOU THINK THE NBA'S NEW IN-SEASON TOURNAMENT WILL HAVE AN IMPACT ON YOUR...?



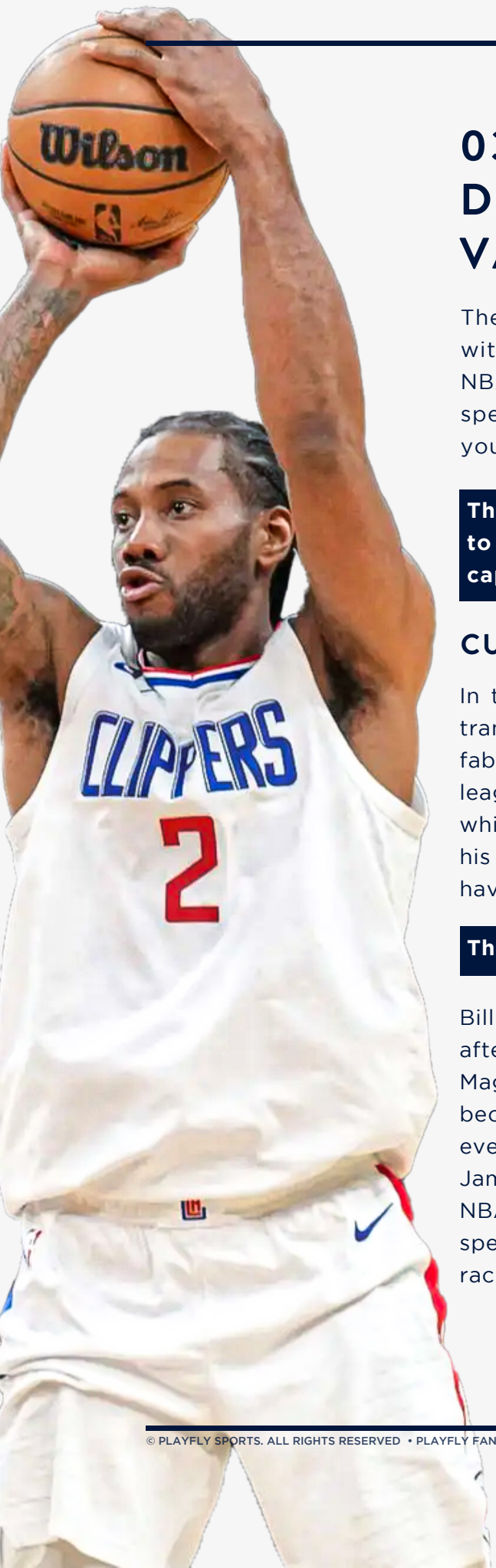
SOURCE: Playfly Insights and Vision Insights Custom Study, NOV 2023.

Fans were overwhelmingly positive about the impact of the event, with 65% responding they were likely to watch games because of the tourney and 67% responding it would have an impact on their interest in the NBA.

Building on early positive sentiment, the tournament play itself was a resounding success.

ESPN reported that the title game between the Lakers and the Pacers was the most-watched regular-season non-Christmas Day game on any network in over five years. What's more, ratings for the preceding NBA Cup games across local and national broadcasts outperformed regular season games in the same time frame last season.

The tourney is certainly here to stay, though Commissioner Adam Silver stated there will be changes and adjustments with the next iteration. The NBA deserves credit for developing new marketable assets that increase regular-season engagement, competition, and excitement!



03. WHAT MAKES THE NBA DIFFERENT AND VALUABLE?

The NBA has carved out a unique place in our culture, with superstars becoming leading social influencers. NBA players have also been icons of social change, speaking out on political issues that resonate with younger and more diverse fans.

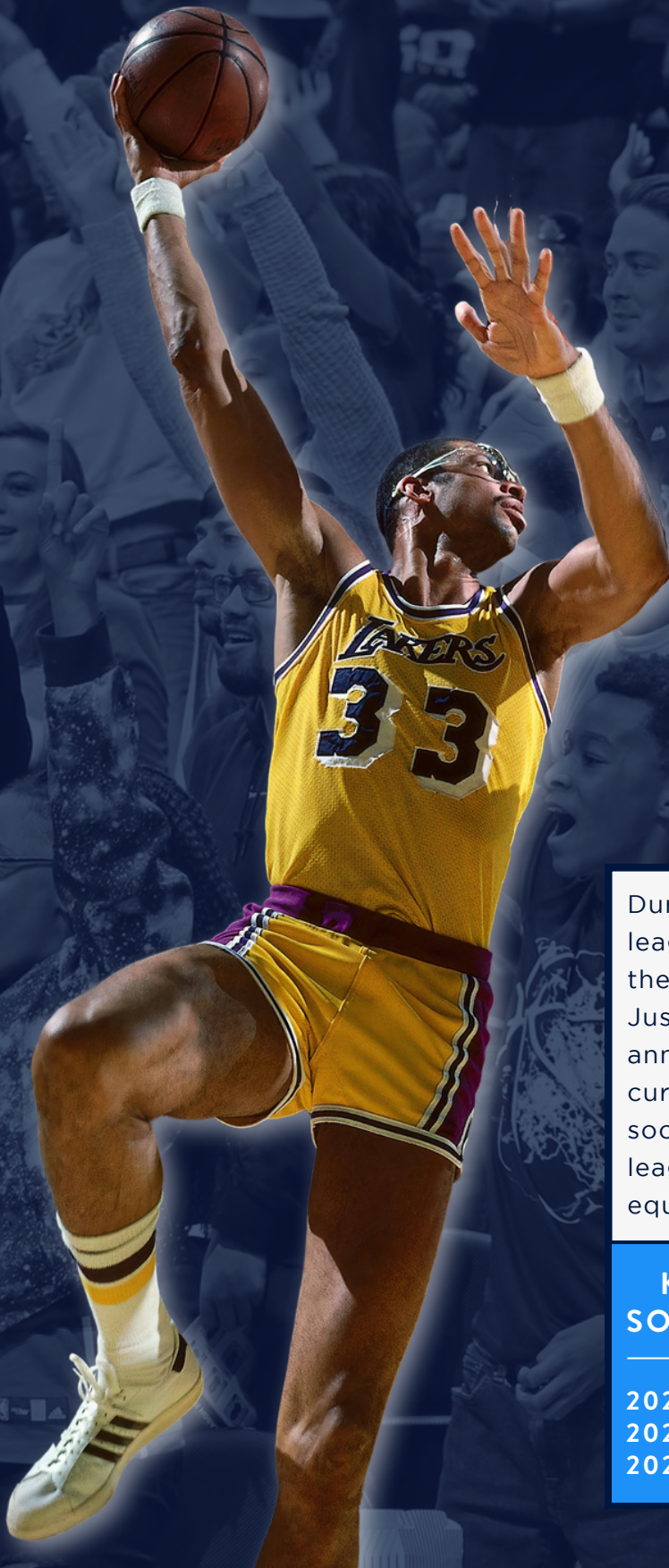
This gives the NBA a progressive aura that appeals to key demographics that other leagues struggle to capture.

CULTURAL AND SOCIAL IMPACT

In the '90s, Michael Jordan became the first athlete to transcend a sport and weave their brand into the social fabric of the time. Jordan didn't only dominate the league, he helped launch the global appeal of basketball while inspiring an entire fashion aesthetic centered on his Air Jordan brand from Nike. But dozens of NBA stars have impacted society in other ways.

The NBA has a legacy of standing up for social issues.

Bill Russell and Kareem Abdul-Jabbar openly protested after the assassination of Martin Luther King Jr. In 1991, Magic Johnson announced his positive test for HIV, becoming an instant spokesperson for the epidemic. But ever since the 2016 ESPY's speech delivered by LeBron James, Carmelo Anthony, Chris Paul, and Dwyane Wade, NBA stars have used their voices and their platforms to speak out against gun violence, police brutality, and racial injustice.



During the 2020-21 Season, the league announced the creation of the Kareem Abdul-Jabbar Social Justice Champion award, a new annual honor that recognizes a current NBA player for pursuing social justice and upholding the league's decades-long values of equality, respect and inclusion.

**KAREEM ABDUL-JABBAR
SOCIAL JUSTICE CHAMPION**

PREVIOUS WINNERS

2022-2023: STEPHEN CURRY
2021-2022: REGGIE BULLOCK
2020-2021: CARMELO ANTHONY

Today's NBA influencers are more vocal and influential than ever before.

From social issues to pregame fashion trends, today's stars wield tremendous influence through massive social media followings, media companies, and cultural influence. Stars like Victor Oladipo and Shai Gilgeous-Alexander intertwine music and fashion with the sport, blurring the lines between sport and lifestyle.

This influence also reaches beyond NBA spheres, with many athletes branching out to new ventures independent of basketball. Russell Westbrook, long known for his pregame avant-garde style, launched his brand Honor the Gift in 2017 and acts as the company's creative director. Damian Lillard of the Milwaukee Bucks, aka. Dame D.O.L.L.A., released four albums as a hip-hop artist and rapper and has his own record label, Front Page Music.

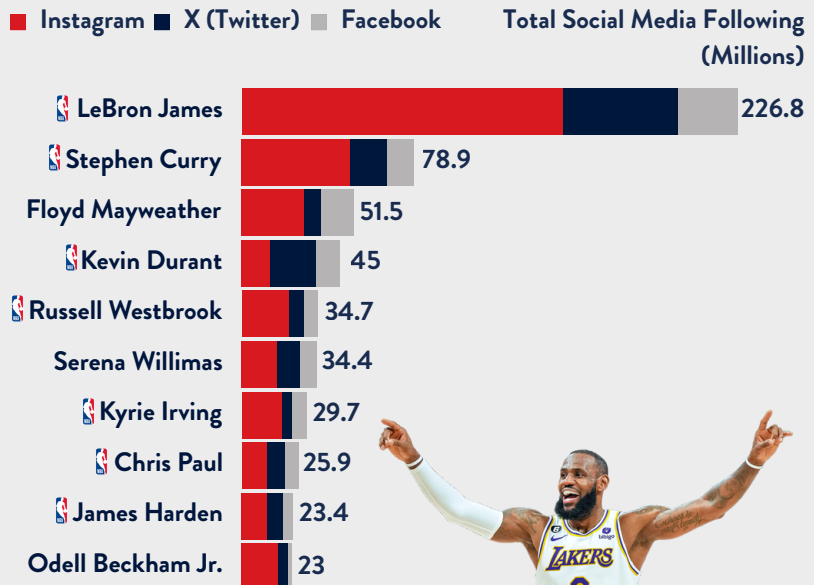
NBA stars have the ear of and resonate with young and passionate fans who follow them on social media, idolize them on the court, and adopt their style. Consider this, despite the NFL's oversized popularity in the United States, seven of the top ten most followed American athletes on social media are NBA players.



SOURCE: @ruswest44 on Instagram



TOP 10 AMERICAN ATHLETES ON SOCIAL MEDIA



SOURCE: Sidelines.io: Who Are The Most Famous Athletes In The World?

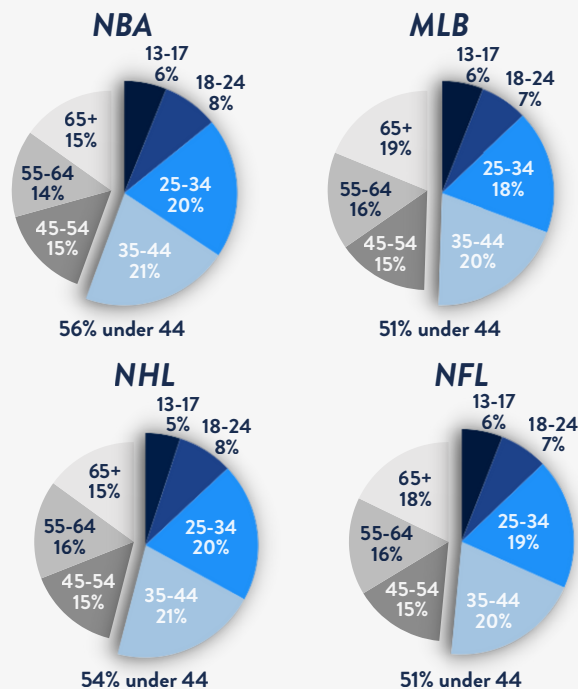


YOUNGER AND MORE DIVERSE FANS

The Association's social influence directly impacts the profile of its fanbase. NBA fans are younger, more diverse, and psychographically different than fans of other professional sports leagues.

The NBA continues to be the sports league of choice for young fans, with 56% of NBA fans under 44 years old, and 28% in the 18-34 demographic.

VIEWER AGE OF NBA, MLB, NHL, AND NFL FANS



SOURCE: Playfly Insights and Vision Insights Decoder, OCT 2022 - SEP 2023.

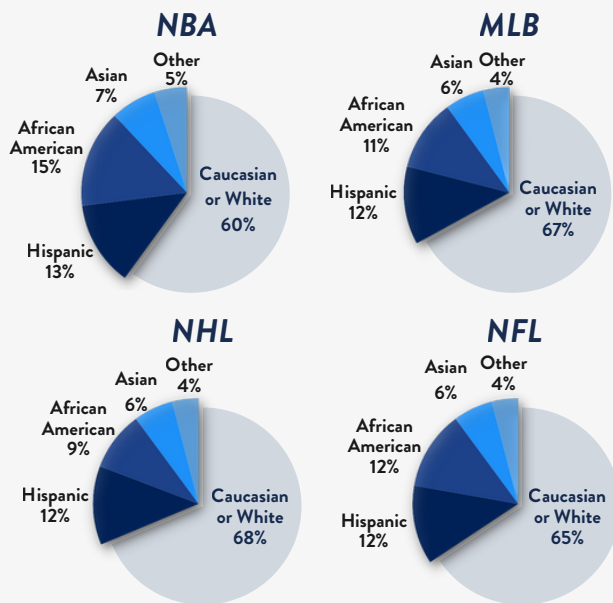


The NBA also has the most ethnically diverse fanbase among the big four US sports leagues. Fifteen percent of NBA

fans are African-American, 13% are Hispanic, and 7% are Asian, totaling 40% non-white.

With strong support across numerous ethnic groups, the NBA audience represents an unparalleled multicultural makeup compared to other leagues.

VIEWER RACIAL BACKGROUND OF NBA, MLB, NHL, AND NFL FANS



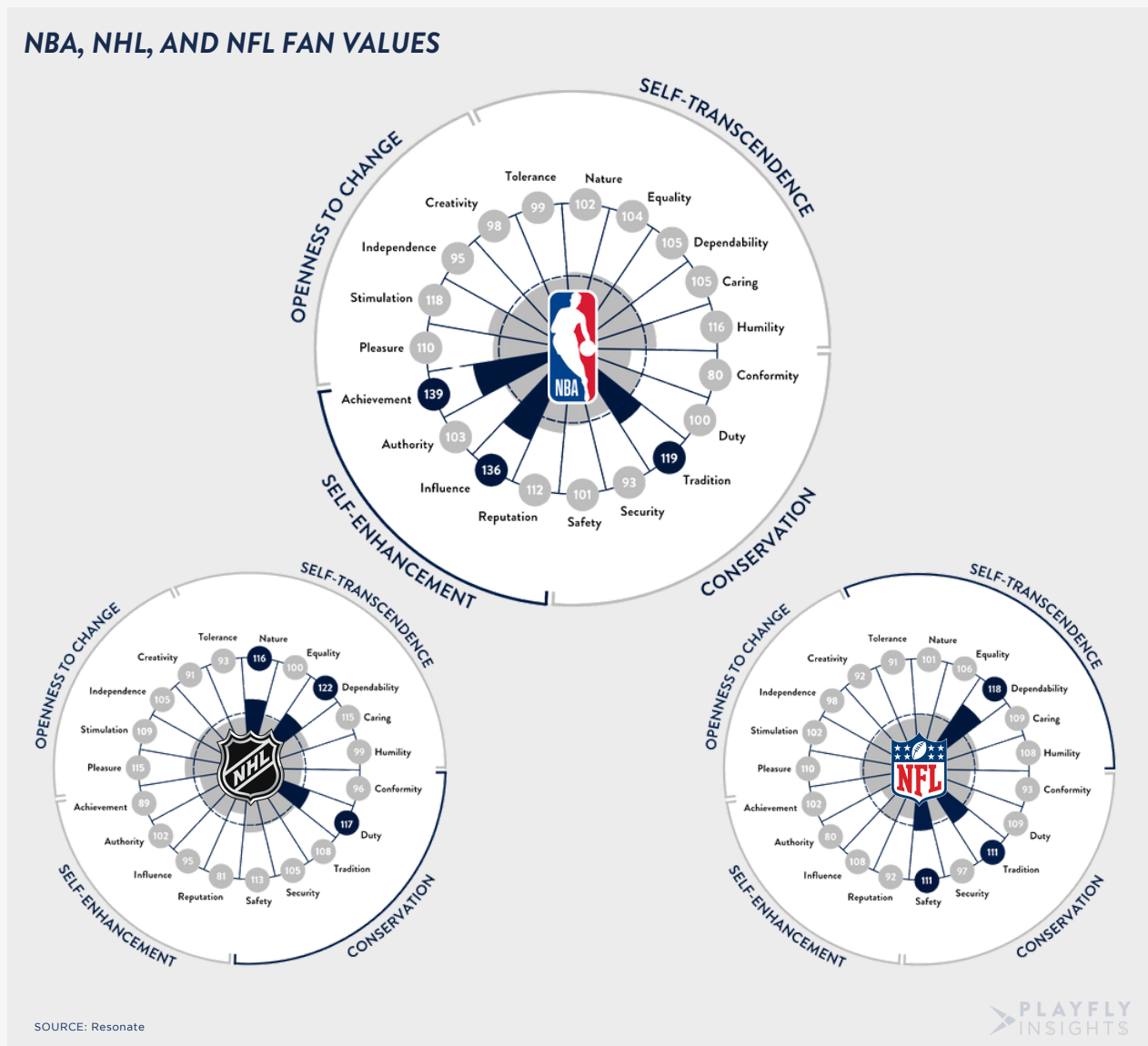
SOURCE: Playfly Insights and Vision Insights Decoder, OCT 2022 - SEP 2023.



NBA FANS HAVE A UNIQUE MINDSET

With such a young and diverse cross-section of America, it makes sense that NBA fans have a unique mindset that stands apart from the other leagues.

NBA fans tend to care more about influence, tradition, and achievement, in contrast to the NHL and NFL. Perhaps influenced by the cultural impact Jordan had on '90s fashion, the NBA ranks first among leagues with fans who “like to stay up to date with the latest fashion trends” and “consider being fashionable important to them.”



Marketers should take note of the nuance in creative messaging to ensure the ads targeting NBA fans are tailored to viewer’s values.



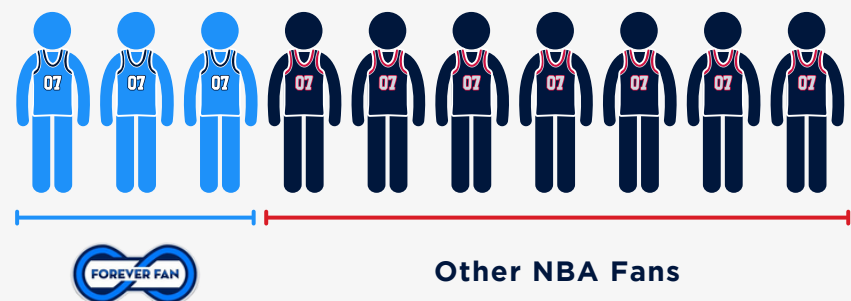
04. FOREVER FANS: THE NBA'S MOST VALUABLE FANS

At Playfly Insights in partnership with Vision Insights, we developed an exclusive proprietary fan profile that uncovers a new way of looking at the most valuable fans in sports, the “Forever Fan”.



Forever Fans make the teams they root for part of their core identity. They bleed team colors, pass their fandom to the next generation, and are vocal advocates for the sport to friends and strangers alike. Their lifelong passion for their team starts early in life, between the day they're born and their 18th birthday.

30% of all NBA fans meet our criteria to be labeled “Forever Fans.”



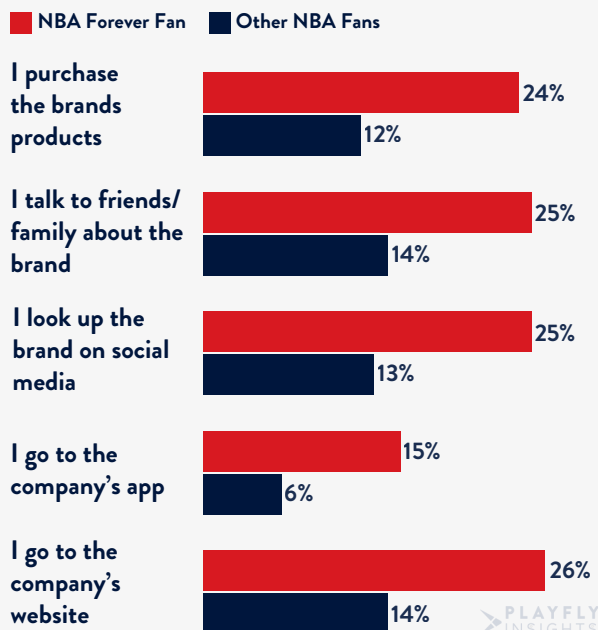
SOURCE: Playfly Insights and Vision Insights Decoder, OCT 2022 - SEP 2023.



THE VALUE OF FOREVER FANS

Forever Fans represent a significant opportunity for brands and marketers to maximize their ad and sponsorship investment. They are twice as likely as other NBA fans to purchase products after seeing a brand's sponsorship and serve as brand ambassadors to friends and family.

AFTER SEEING A BRAND'S SPONSORSHIP WITH A LEAGUE, TEAM, OR INDIVIDUAL, WHAT ACTIONS DO YOU TYPICALLY TAKE?

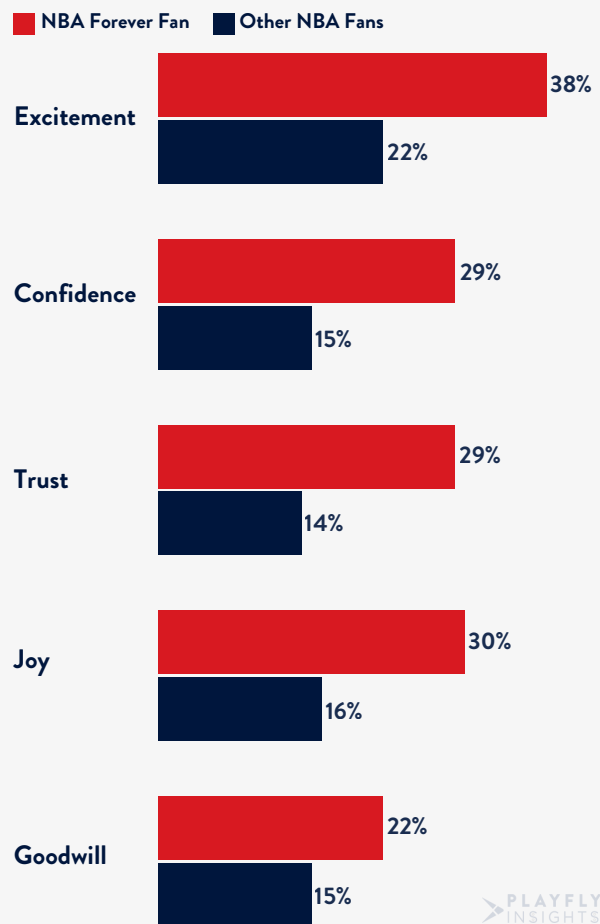


Source: Playfly Insights and Vision Insights Decoder, OCT 2022 - SEP 2023

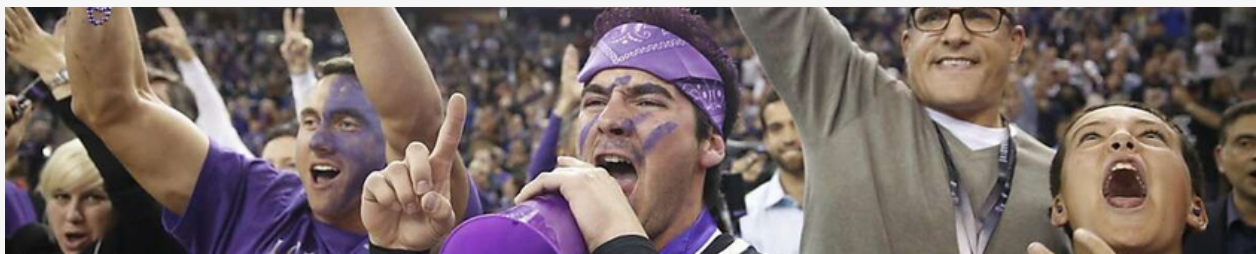


Additionally, more Forever Fans feel positive emotions toward sponsors than other fans. Excitement and joy lead the way for this loyal fanbase that is likely to adopt sponsors into the 'we' mentality if they resonate with the offering and messaging.

POSITIVE SPONSORSHIP EMOTIONS



Source: Playfly Insights and Vision Insights Decoder, OCT 2022 - SEP 2023



WHERE TO FIND FOREVER FANS

The concentration of Forever Fans across teams doesn't reflect the usual big names you see every week on national broadcasts.

For example, the Pelicans and Wizards sit in the top five of Forever Fan concentration, and the Lakers and Warriors near the bottom of the league. What causes this inverted paradigm?

Highly successful teams with lots of national exposure attract casual fans or "bandwagon fans". The fan bases of the Pelicans, Grizzlies, etc. are just different - comprised of life long fans that have supported the team

despite their inherent small market challenges. There is a bit of "us against the world" mentality for these Forever Fans.

NBA FOREVER FAN RANKING BY CONCENTRATION

TEAM	RANKING	# OF NATIONAL GAMES
 New Orleans Pelicans	1	6
 Memphis Grizzlies	2	13
 Brooklyn Nets	3	5
 Washington Wizards	4	1
 Oklahoma City Thunder	5	8
 Los Angeles Lakers	26	28
 Golden State Warriors	27	29
 Houston Rockets	28	1
 Chicago Bulls	29	4
 Minnesota Timberwolves	30	5

HOW DID YOU BECOME A FAN OF YOUR FAVORITE TEAMS?

	NBA FOREVER FAN	OTHER NBA FANS
My parents were a fan of the team and influenced me to also root for that team	33%	24%
It is my local team now	27%	24%
It was my local team growing up	41%	32%

SOURCE: Playfly Insights and Vision Insights Decoder OCT 2022 - SEP 2023.



AGE BECAME A FAN OF NBA TEAM

	NBA FOREVER FAN	OTHER NBA FANS
0-7 years old	28%	10%
8-12 years old	43%	19%
13-17 years old	29%	15%
18-24 years old	0%	18%
25 years old or older	0%	21%
N/A - I don't have a favorite team	0%	17%
N/A - Not a fan of this league	0%	0%

SOURCE: Playfly Insights and Vision Insights Decoder OCT 2022 - SEP 2023.





ACTIVATING THE MOST VALUABLE NBA FANS

To ensure significant reach with NBA Forever Fans, marketers need to associate their brand as close to the team that people love as possible. They can do that by literally being on the uniform or being in their building, or through the team's local media outlet.

Key Forever Fan Touchpoints:

Team Sponsorship

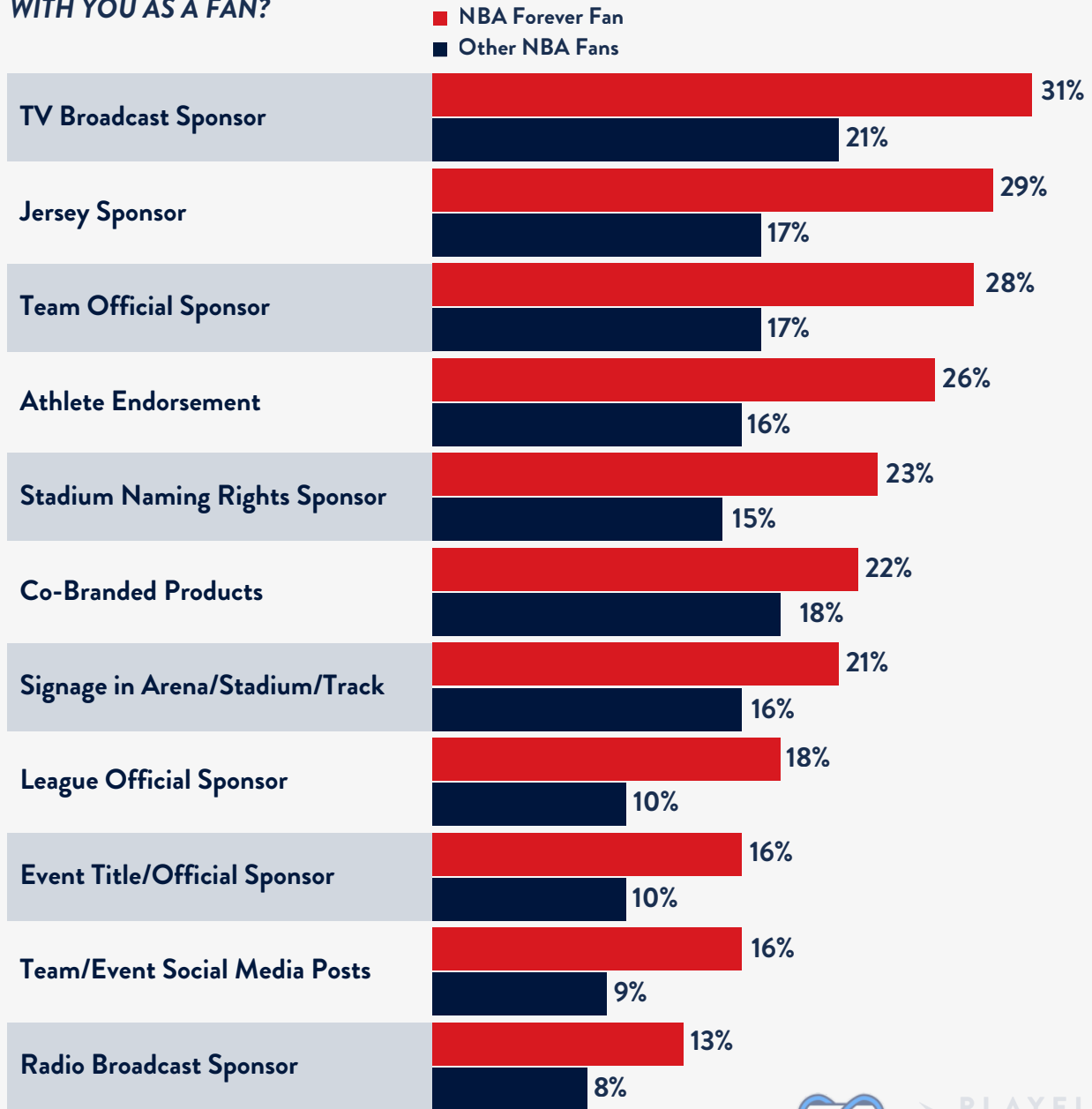
Through jersey patches and assets in and on the arena, brands embed themselves directly into the fan experience.

Team Media

By advertising through local broadcasts, brands reinforce their team sponsorship and associate themselves with the collective fan identity of "we" rather than "they".

According to data from Playfly Insights and Vision Insights, team media and team sponsorship are the most memorable types of sponsorships for Forever Fans. Associations via broadcast sponsorship, jersey sponsorship, naming rights, and other sponsorship types connect brands with this dedicated and substantial portion of NBA fandom.

WHAT TYPES OF SPONSORSHIPS ARE THE MOST MEMORABLE AND TEND TO RESONATE WITH YOU AS A FAN?



SOURCE: Playfly Insights and Vision Insights Decoder OCT 2022 – SEP 2023.



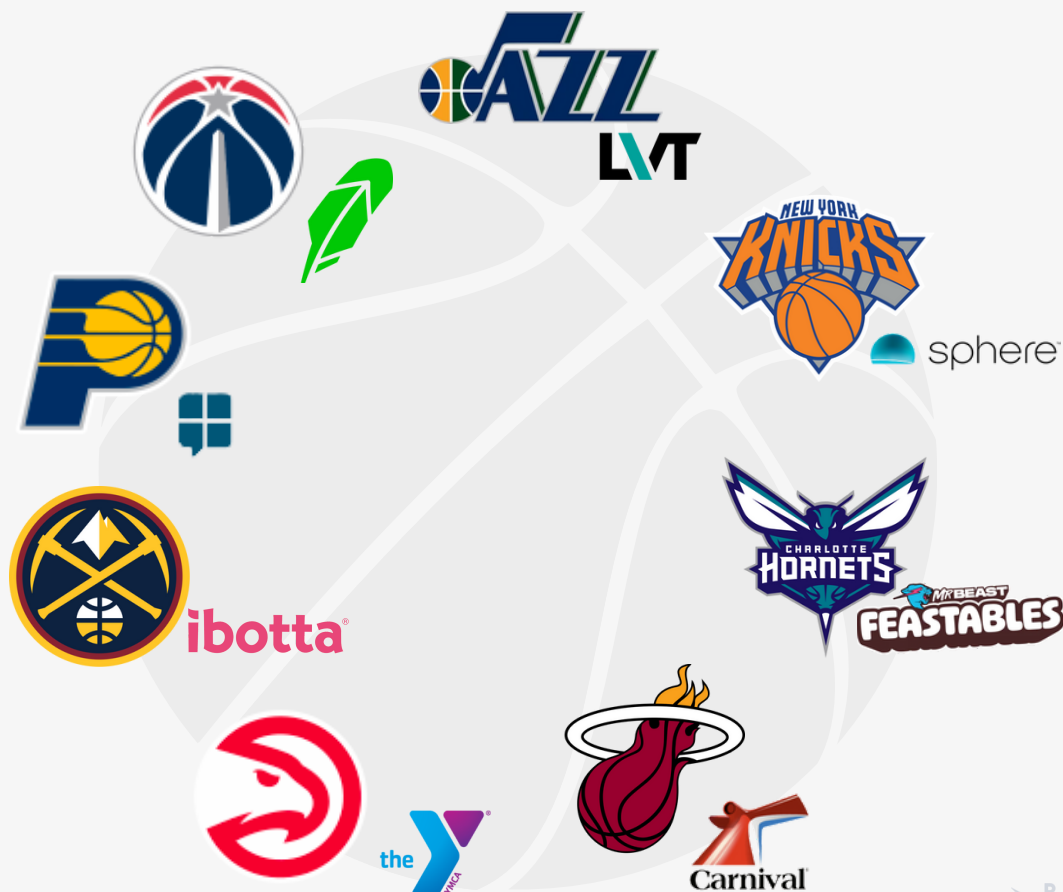
TEAM SPONSORSHIP: THE NBA JERSEY PATCH

Only 2.5 by 2.5 inches in size, these patches represent a great opportunity for sponsors to get their brand in front of Forever Fans.

Following a model long used in soccer, the NBA became the first of the big four American sports leagues to allow sponsorship patches on team jerseys. The patches offer partners prime visibility during game broadcasts with nearly constant exposure while players compete, not to mention visibility on merchandise and in highlights. While met with some initial fan resistance over commercializing uniforms, the patches are now simply part of the NBA aesthetic, with 28 of the 30 teams featuring a jersey patch this season.

A sign of continued momentum, 8 new patch deals were signed in 2023 with major brands partnering with teams.

NEW JERSEY PATCH DEALS IN 2023



Source: Playfly Insights, NBA 2023-24 Season.

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These patches generated an average value of \$8.7 million per agreement league-wide, nearing a quarter of a billion dollars in revenue.

This season, thirteen categories are represented on jersey patches. Financial services and retail/eCommerce saw twice as many deals this season than last, while manufacturing, non-profits, and consumer electronics entered the patch arena.

As a proven asset with prime exposure, the patch continues unlocking new ways for innovative brands across industries to access Forever Fans.

2023-2024 JERSEY PATCH DEALS BY CATEGORY

CATEGORY	# DEALS IN 2023-24
Financial Services	8
Retail/eCommerce	4
Technology – Business	3
Entertainment and Travel	3
Telecom	2
Food	2
Consumer Electronics	1
Non-Profits	1
Manufacturing	1
Retail/Convenience Store	1
Bank	1
Insurance	1
Office Equipment	1

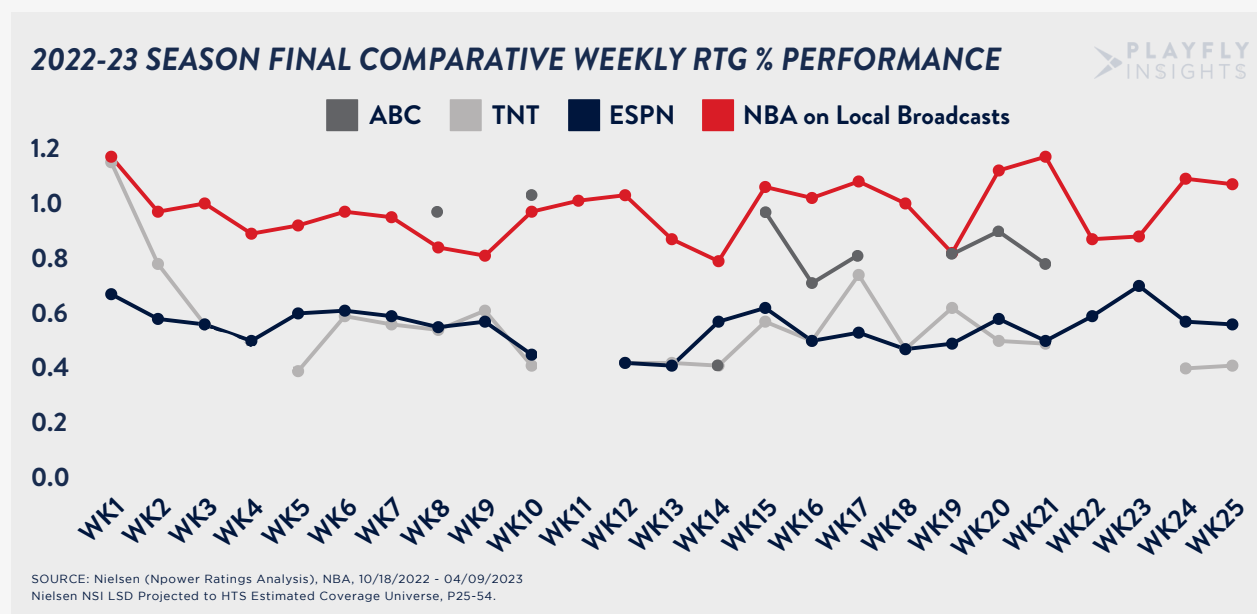
Source: Playfly Insights, NBA 2023-24 Season.



TEAM MEDIA: UNLOCK THE VALUE OF THE REGULAR SEASON

In tandem with team sponsorships, brands and marketers can get in front of Forever Fans with their team's local media partner, traditionally Regional Sports Networks or RSNs. On these networks, brands join Forever Fans on the season long ride of compelling storylines and emotional wins and losses that drives fan passion. For these fans it's this exhilarating journey, not the destination, that has them coming back season after season.

Consequently, aggregate viewing of NBA local broadcasts consistently delivers a larger TV viewing audience than games on ABC, ESPN and TNT.



Ironically, local NBA broadcasts represent all NBA forever fans better than nationally televised games.

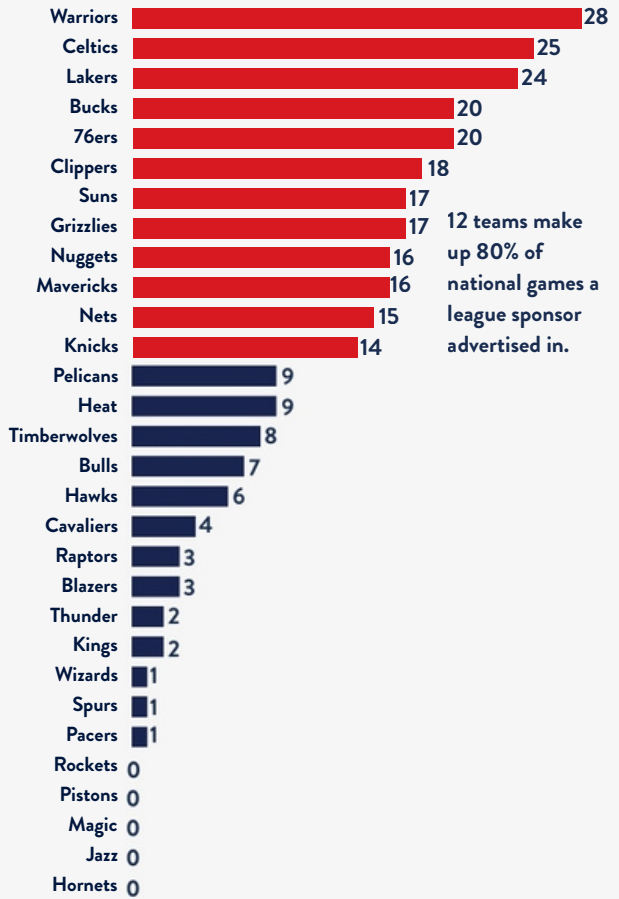
Why is this?

The national games are heavily reliant on a handful of “marquee” teams with star-powered rosters to make up its schedule - a strategy that maximizes monetizable viewership numbers by attracting casual fans to the tv set.

An analysis of an Official League Sponsor’s NBA TV buy from the 2022-23 season shines a light on this reality. The advertiser had commercials in 28 Golden State Warriors games and only 7 ads in Chicago Bulls games. In fact, of the 663 ads run all season, ZERO ran in games featuring teams from Houston, Orlando, Salt Lake, Charlotte and Detroit.

FACT: The best pathway to the valuable NBA Forever Fan is with the Team’s local media partner.

LEAGUE SPONSOR’S ADS IN NATIONAL NBA GAMES BY TEAM 2022-2023



Source: Playfly Insights and Nationally Released Broadcast Schedules, NBA League Sponsor, 10/18/2022 - 04/09/2023.



PLAYFLY INSIGHTS AND VISION INSIGHTS' CASE STUDY: HOME VS. AWAY BROADCAST ANALYSIS

OBJECTIVE

Playfly Insights and Vision Insights conducted a study measuring both the home and away feeds to accurately measure the exposure time of specific assets during NBA broadcasts.

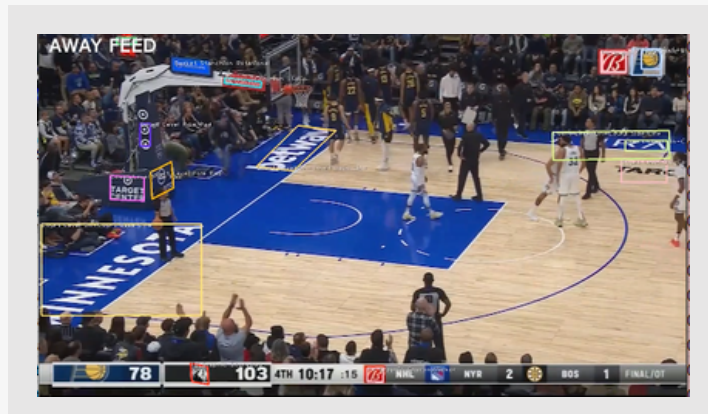
APPROACH

Decoder Media's innovative approach in Linear TV Broadcast analysis surpasses other data providers by accurately differentiating between home and away broadcast feeds.

KEY FINDING

Our study revealed substantial variations, particularly during NBA game timeouts, leading to different viewing experiences between the home and away feeds.

Independent analysis of both feeds reveals substantial differences in sponsorship duration for different NBA assets, challenging the common practice of doubling impressions from the home feed. Even when the RSNs are showing the same angle of the game, sponsorship differs by feed and can lead to different brand exposure, or no coverage at all.



INSIGHT

In terms of apparel assets, on average there's a 211 second [91%] difference in sponsorship duration between both feeds.

For on-court assets, the average difference is 230 seconds [8%] between both feeds.

Therefore, relying on the home feed alone, simply multiplying by two (2) and applying impressions from each market does not accurately represent brand value.



6. PLAYFLY FAN SCORE

Marketers and brands that are looking to tap into the passion of NBA fandom must activate the audiences that bring the most value.

INTRODUCING THE PLAYFLY FAN SCORE

The Playfly Fan Score (PFS) is the first actionable and insightful sports ranking index geared to marketers and sports business leaders. PFS is a fresh perspective to understanding fan value based on our proprietary factors:

- **Fan Passion**
- **Fan Receptivity**
- **Fan Marketplace**

Rankings shouldn't be up for debate when it comes to business analytics. That's why we partnered with [Vision Insights](#), leaders in sports sponsorship measurement, to develop a custom algorithm to quantify fandom and sponsor performance.

Dig into our Playfly Fan Score: NBA Edition and see who comes out on top.

HOW WE TALLY THE SCORE

The Playfly Fan Score is a composite of three proprietary metrics measuring passion, receptivity, and demand. The index includes public

data, and Vision Insights sponsor data. Contact us for more information about our methodology.

FAN PASSION

Our Fan Passion Score measures fan base size, attendance and viewership, team performance, fan engagement and participation, and fan commitment. How do we measure intangibles like fan commitment? We use Vision Insights data to measure loyalty based on fan resiliency.

FAN RECEPTIVITY


Fan Receptivity Score is the measure of a fan's responsiveness to advertising. We measure sponsor recall against actions taken as a result of team sponsorship, positive impressions, consideration, and Forever Fan concentration. Fan Receptivity is powered by our teammates at Vision Insights.

FAN MARKETPLACE

Fan Marketplace Score is a mix of advertiser demand data from Playfly's Home Team Sports (official sales agents for ALL Regional Sports Networks) and franchise value. It provides an industry first look at how teams are "valued" by marketers and investors.



PLAYFLY FAN SCORE: NBA TOP 10

RANKING		TEAM	INDEX	SCORE
# 1		GOLDEN STATE WARRIORS	143	4.08
# 2		LOS ANGELES LAKERS	131	3.74
# 3		NEW YORK KNICKS	128	3.63
# 4		BOSTON CELTICS	125	3.55
# 5		MIAMI HEAT	116	3.30
# 6		BROOKLYN NETS	114	3.25
# 7		CHICAGO BULLS	113	3.23
# 8		DALLAS MAVERICKS	113	3.21
# 9		PHILADELPHIA 76ERS	108	3.08
# 10		MILWAUKEE BUCKS	106	3.02

RANKINGS DIFFER BY METRIC

We ranked the top five fan bases in each category and were surprised by the results.

FAN PASSION	FAN RECEPTIVITY	FAN MARKETPLACE
 GOLDEN STATE WARRIORS	 MEMPHIS GRIZZLIES	 GOLDEN STATE WARRIORS
 BOSTON CELTICS	 BROOKLYN NETS	 LOS ANGELES LAKERS
 CLEVELAND CAVALIERS	 CHARLOTTE HORNETS	 NEW YORK KNICKS
 MILWAUKEE BUCKS	 ORLANDO MAGIC	 BOSTON CELTICS
 TORONTO RAPTORS	 OKLAHOMA CITY THUNDER	 CHICAGO BULLS



WANT TO DIG DEEPER?

Our Playfly Fan Score only scratches the surface. Reach out to Playfly Insights today at playflyinsights@playfly.com to learn more about your fans and discover actionable data.

CUSTOM RESEARCH STUDIES

- Fan Satisfaction Study
- Pricing Analysis (e.g., Yield Management, Venue Rescaling, New Inventory)
- Donor, Premium, and Season Ticket Analysis
- TV Visible Signage Assessment
- Recruiting & Retention Study
- Custom Forever Fan Study

FAN SEGMENTATION STUDY

Playfly Insights will help you identify your specific and custom fan segments based on fan behavior and preferences, allowing you to target and activate these segments differently (e.g., ticketing, donations, marketing).

"ALWAYS ON" FAN INSIGHTS

Take a deeper dive into fan profiles with your own annual license to Vision Insights' Decoder media valuation product, plus get actionable data analysis and reporting from Playfly Insights.



FAN FOCUSED, DATA DRIVEN

Playfly Sports is a sports media, marketing and technology business centered around the team, league, brand, and network. Believing in 'Fandom as a Service' and focusing on a consultative, data driven approach to REACH, ENGAGE, MONETIZE AND MEASURE FANDOM gives the company's partners and brands a competitive advantage. Playfly connects more than 2,000 brand partners with approximately 83% of all U.S. sports fans. Through the proprietary platform the business delivers scalable, data-oriented marketing, technology, and media solutions with capabilities including exclusive MMR management, sponsorship sales and activation, streaming, consulting, ticket/premium sales, all along with new revenue-driving platforms and technologies.

Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states dedicated to maximizing the impact of highly passionate local sports fans.

Follow Playfly Sports on social media @PlayflySports or visit www.playfly.com



BRINGING FAN INSIGHTS INTO FOCUS

Vision Insights is a congregation of some of the most experienced sponsorship measurement professionals in the world. Their vision is to provide every marketer, rights holder and agency with the most complete resource for fan insights, consumer intelligence and sponsorship performance.