

KORE MARKET INTEL REPORT

# NFL 2023

A data perspective of social media impact, and insights kicking off the **2023-2024 NFL** season.



# Why Measure Social?

1

## Major Audience Shift

Social is where people engage with their favorite sport.

- ✓ 262B Social Engagements vs 1.6B TV + Stadium Spectators 2022 World Cup
- ✓ 45% of people globally will no longer watch linear TV by end of 2023

2

## Deeper Data

More opportunity to analyze alignment & performance

- ✓ Verifiable engagement, viewership and audience demographics data
- ✓ Ability to benchmark against the entire sport & entertainment ecosystem

3

## Near Real-Time

Make decisions on the fly to drive optimization

- ✓ Results in < 24hr VS 4-8 Weeks to optimize – adjust content, boost trending posts
- ✓ 98% of marketers will activate sponsorships via social media\*



A single-source platform to help organizations **manage**, **measure**, and **optimize** their partnership portfolio at every stage of the life cycle

**200**

Experts,  
passionate about  
partnerships,  
data, and results

**500K**

Brand, team, league,  
event, venue, and  
athlete accounts  
tracked

**\$5B**

Global sponsorship  
transactions  
managed YOY

**\$10B**

Annual social  
sponsorship value  
measured

**Working with 900+** of the world's most valuable brands, properties and agencies.



# Quantifying Sponsorship Value

## Promotion Quality Factors



Position



Coverage



Clarity



Competition



Crowding



Viewership

- 500K Athletes, teams, leagues, events, venues, media
- 2B+ Fan connections
- 20M+ Social posts per month
- 10K Brands analyzed for text & visual exposure

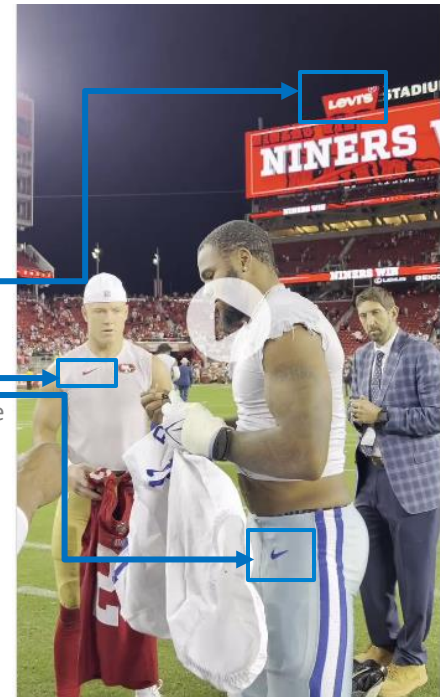
Step 1: Identify Brand Promotion

Step 2: Max Ad Value (MAV) =  
Total engagements x CPEs

Step 3: Adjusted Ad Value =  
MAV x Promo Quality

Levi's  
58%

Nike  
7%



\$912.2K	11.4%	\$104.4K
MAV	PROMO QUALITY	AAV

2.6M views, 6.7K likes, 247 comments, 573 shares, 0 retweets





## KORE Market Intel Reports

Our goal is to deliver insights and thought leadership around the state, impact & potential of sport and the leagues, teams, athletes and events within them. The purpose is to fuel strategic and tactical actions for brands and rights holders on where to invest and how to more effectively drive partnership value.

### We aim to answer...

Is this a good place to invest and who / what assets should we invest in?

How do we stack up & how can we optimize our investment?

What is working & who is performing / trending?

## What Was Analyzed

More than 345.6K posts from the league, teams, players and any content that referenced (via @, # or keyword) them in the 2023 season to date. Date range includes 1 Aug 2023 – 1 Nov 2023.

Social media data includes followers, posts, engagement, & valuation data.

Platforms include Facebook, Instagram\*, TikTok, Twitter, YouTube, Weibo and VK.

Spend data is aggregated & anonymized from NFL team & league deals.

\*Instagram data includes public Business & Creator accounts only. IG Stories data only from authenticated sources.



**+21%**

Total Social Engagement +Views

**12.6B**



**+5%**

Total Broadcast Viewership

**859.3M**



**+13%**

Average spend across assets in NFL Deals





# FOOTBALL IS SOCIAL



# NFL Impact On Social

Includes league, teams, and athletes.

**2.9B**

Followers  
(+3.5% YoY)

**226K**

Total Posts  
(-2% YoY)

**1.4B**

Engagements  
(+33% YoY)

**11.2B**

Video Views  
(+20% YoY)

LEAGUE



**400.2M**  
Engagements  
(+6% YoY)

TOP ATHLETE



**20.2M**  
Engagements  
(+883% YoY)

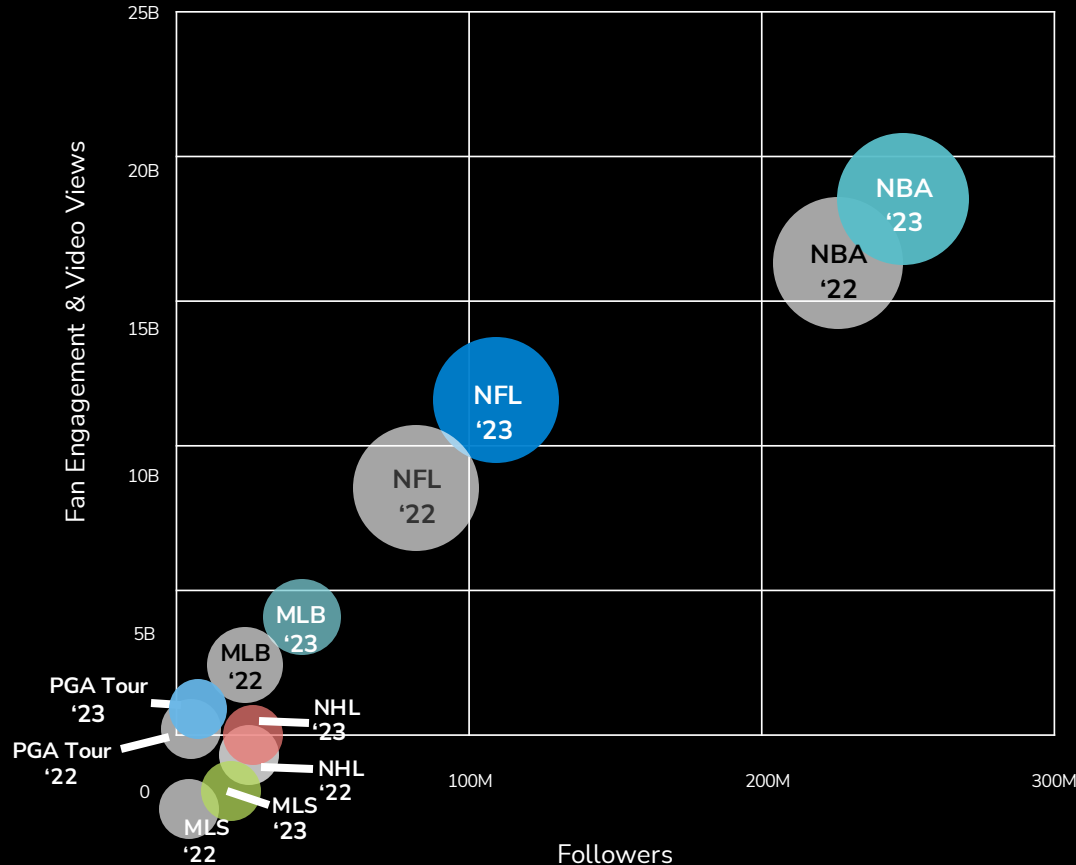
TOP TEAM



**465M**  
Engagements  
(+414% YoY)

# Big League Social Footprint - '22 '23

League Owned Accounts Only



## Market Intel

Comparing the NFL with all the North America big leagues over the last year...

The NFL's fan base grew by 11% (106.5M), for the second year in a row and engagement grew by 21% (13.1B), which outside of the PGA and MLS outlier growth, leads the big leagues.

	YoY Follower Growth	YoY Engagement & Video View Growth
NBA	9%	17%
<b>NFL</b>	<b>11%</b>	<b>21%</b>
MLB	12%	9%
PGA Tour	13%	46%
NHL	7%	12%
MLS	52%	287%

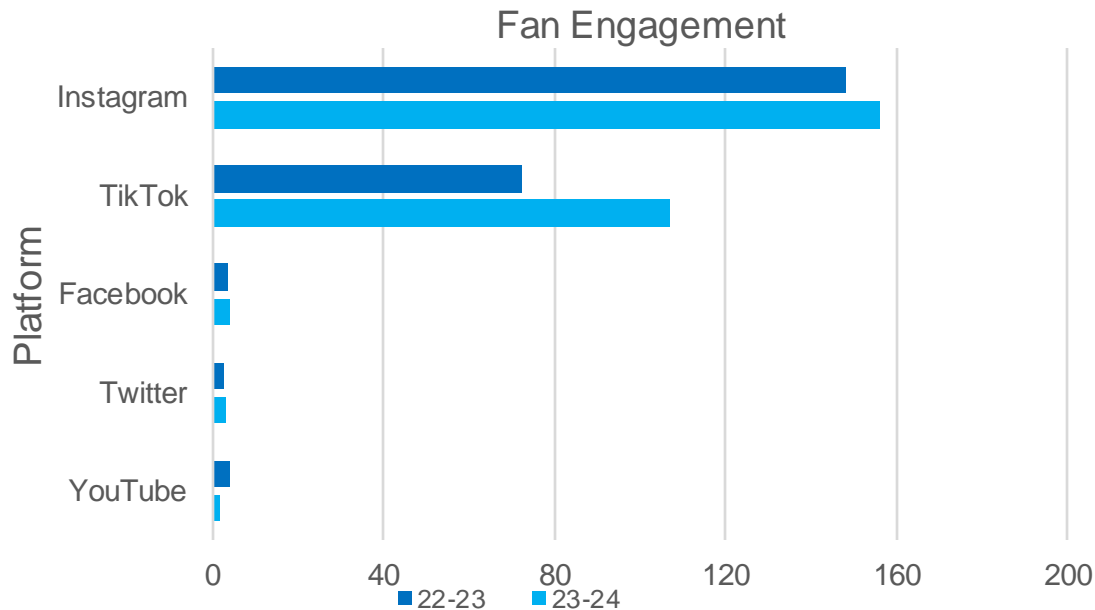
Data date range: 24 Oct, 2022 – 24 Oct 2023 vs. 24 Oct, 2021-24 Oct, 2022.





# Platform Impact On The NFL Channels

## Average Fan Engagement Per Post



### Market Intel

The average engagement per post across social media is up year-over-year.

**TikTok** had the highest growth of engagement per post at 48%, while **Instagram** drove 57% of the overall fan engagements per post.

**Platform X (formerly Twitter)** total posts are down 6% yet fan engagements are modestly up 5%. Twitter video views, however, (not shown) make up 24% of video views across all five platforms, and views are up 50%.

**Facebook** is becoming a much less utilized platform, earning 28% less engagements this season than last.

# The Swift Lift



KORE | NFL 2023



## IN THE NUMBERS YEAR-OVER-YEAR

### Swift lift on Travis Kelce

- Engagement up over 1,000%
- Value up over 1,000%
- Follower growth up 65%

### Swift lift on League, Teams & Network

- KC Chiefs engagement is up 154%
- TV audience for the Chief v. Jets game up 19%, gaining 3.98M total viewers
- NBC reached 1.9M more women than last year's Sunday Night Football window
- 9 out of 12 of the NFL's top posts since mid-July have been focused on either [#Kelce](#), [#Chiefs](#) [#TaylorSwift](#) 🗣️ or a combination, generating over 14M engagements, led by TikTok.



# It's the NFL's world; the rest of us just live in it.

- **82 of the 100 most watched programs** in 2022 are NFL games (up 10% from 2021)
- The NFL accounted for nearly **10% of all live T.V. deliveries** in 2022
- CBS' *FBI* was T.V.'s most-watched entertainment program in 2022 with **7.21M** live-same-day viewers (the NFL's afternoon window shared by Fox and CBS averaged **25.8M viewers**).
- The current NFL contract value: **\$125B**

## Top 100 Most-Watched U.S. TV Broadcasts of 2022



NFL	College Football	Political Programming	World Cup
Thanksgiving Parade	Winter Olympics	Academy Awards	Kentucky Derby
College Basketball			

Chart: Lev Akabas • Source: Nielsen live-plus-same-day data Jan. 1-Dec. 31, 2022  
 @ levakabas  
 @ datakabas





# Financials

The most valuable franchises,  
contracts & the highest paid players



# Team Values

## Top 10 Most Valuable NFL Franchises

		Team	Value	1-Year Value Change
1		Dallas Cowboys	\$9.2B	+20%
2	↑+2	New York Giants	\$7.04B	+23%
3	↓-1	Los Angeles Rams	\$6.94B	+17%
4	↓-1	New England Patriots	\$6.7B	+14%
5		San Francisco 49ers	\$6.15B	+19%
6	↑+1	New York Jets	\$6.11B	+27%
7	↑+1	Washington Commanders	\$6.05B	+27%
8	↓-2	Chicago Bears	\$6B	+20%
9		Philadelphia Eagles	\$5.95B	+27%
10	↑+5	Las Vegas Raiders	\$5.77B	+41%

Table: Lev Akabas • Source: Sportico

Sportico

## Recent NFL Franchise Sales

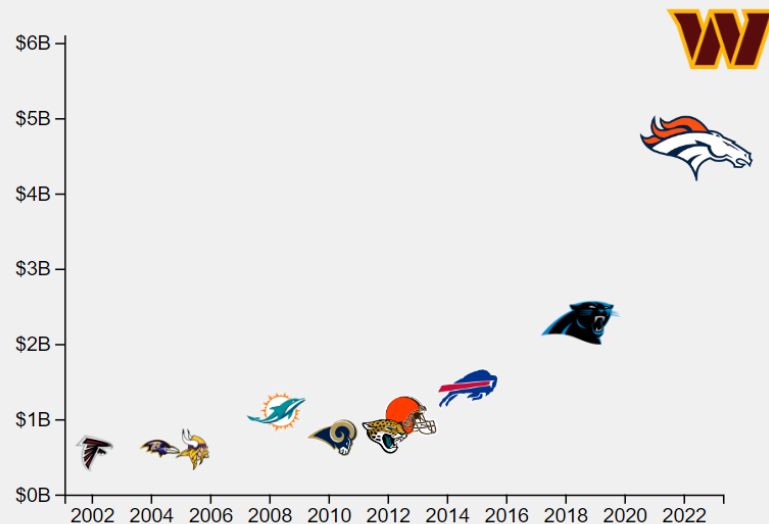


Chart: Lev Akabas  
 levakabas  
 datakabas

Sportico





# Top Player Value

## Top 10 Highest-Paid NFL Players in 2023

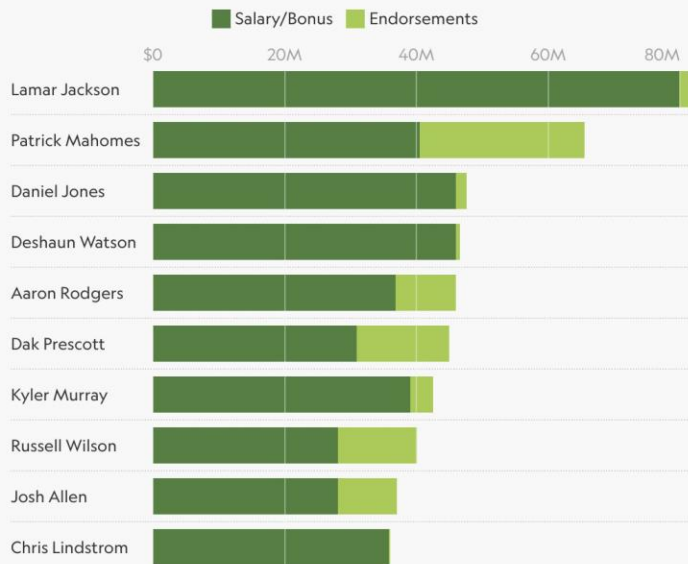


Chart: Lev Akabas • Source: Sportico

Sportico

## Top 50 NFL Contracts by Annual Value

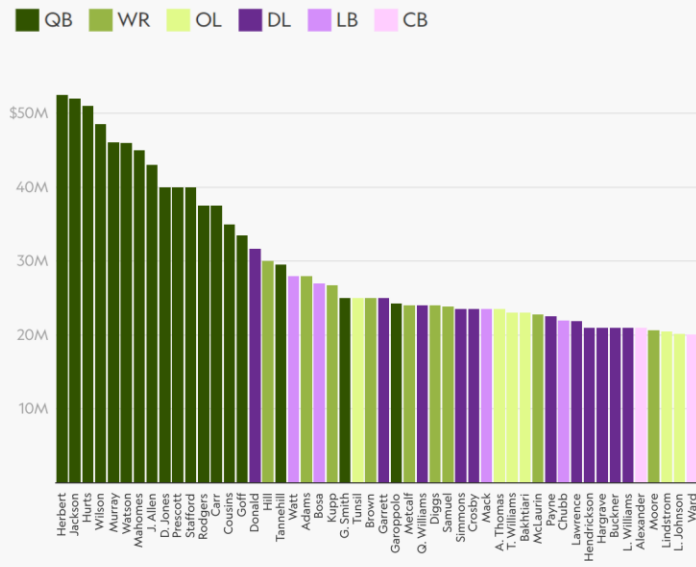
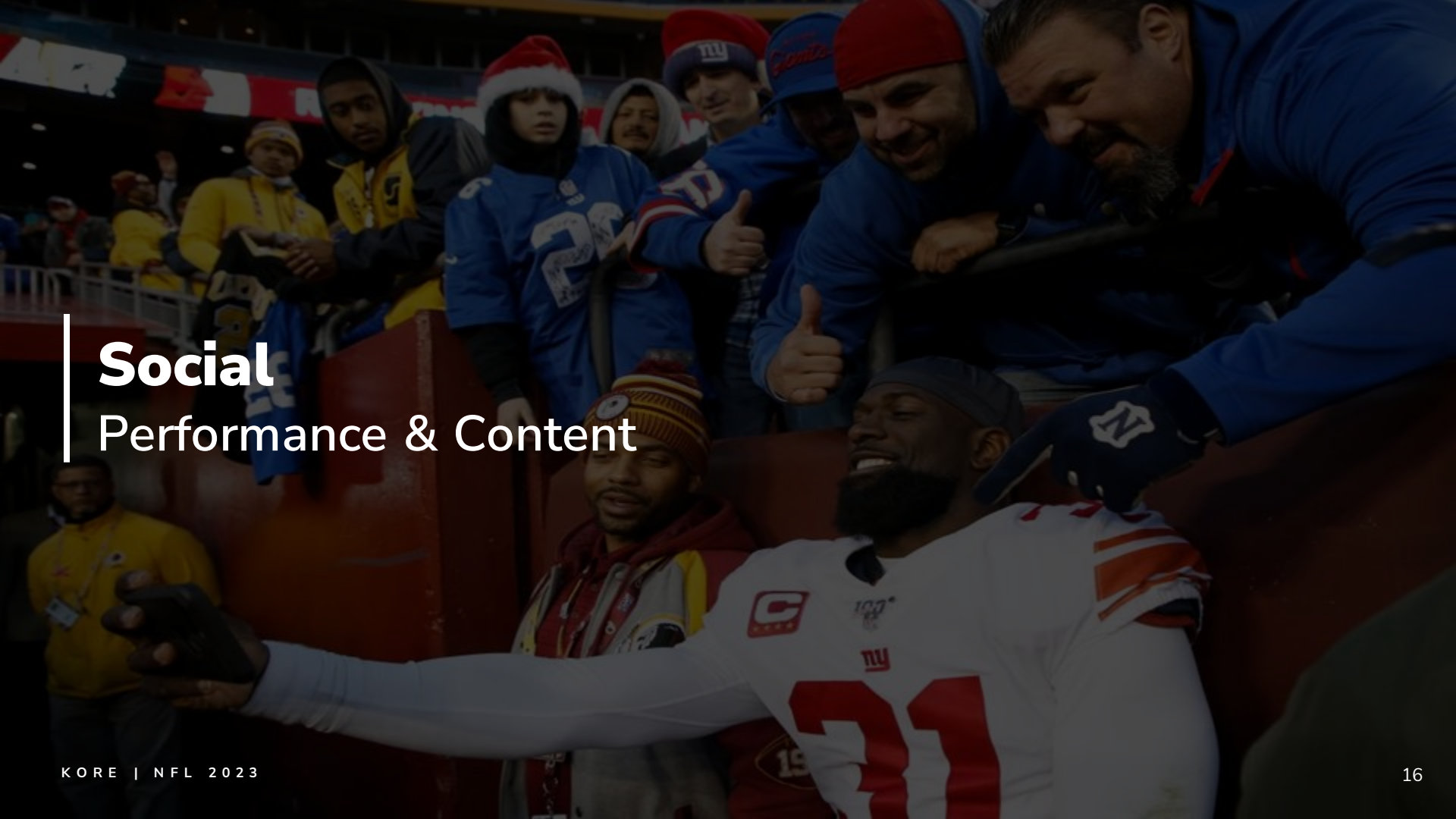


Chart: Lev Akabas • Source: Spotrac











Sportico



# Social

## Performance & Content

# Top Athletes by Video Views & Engagement Combined

Rank		Posts	Fan Engagement & Video Views	Engagements per post	AAV	Follower Growth
1 (+10)	 <b>Travis Kelce</b> 🐦 📷 📘 🎵	49	108.1M	2.2M	\$635.7K	65%
2 (+4)	 <b>DeAndre Hopkins</b> 🐦 📷 📘 🎵	52	43.4M	1.1M	\$8.2K	4%
3 (+2)	 <b>Tyreek Hill</b> 🐦 📷 📺 🎵	252	32.7M	139K	\$104.6K	.4%
4 (-2)	 <b>Odell Beckham Jr.</b> 🐦 📷 📘 📺 🎵	77	30.4M	394.8K	\$38K	11%
5 (+44)	 <b>Micah Parsons</b> 🐦 📷 🎵	124	28.9M	255.7K	\$38K	11%
6 (-2)	 <b>Patrick Mahomes</b> 🐦 📷 📘	69	24.8M	359.4K	\$277.8K	3%
7 (+8)	 <b>Cooper Kupp</b> 🐦 📷 🎵	19	22M	1.2M	\$20K	2%
8 (-5)	 <b>Russell Wilson</b> 🐦 📷 📘 📺 🎵	99	10.8M	156.2K	\$37.9	1%
9 (+100)	 <b>Joshua Dobbs</b> 🐦 📷 🎵	68	10M	156.2K	\$36.5K	15%
10 (+100)	 <b>Tee Higgins</b> 🐦 📷 🎵	23	7.4M	321.7K	\$28.8K	14%

## Market Intel

### New to the top 10

- Travis Kelce's social media accounts created nearly 2x the value of last year's top athlete, Tom Brady, and 10% more engagement.
- Micah Parsons engagement grew by 583% thanks to TikTok, despite posts dropping by 13%.
- Josh Dobbs' post of his Cardinals jersey not offered at a kiosk to customize went viral.

### Decline in NFL Athletes' Usage & Engagement on Platform X

- NFL athletes' posts on X marginally decreased, making up 37% of their total social media activity.
- The top 10 athletes posting activity declined by a combined 83% compared to last year's top 10.
- Engagement for the top 10 on X fell by 72% and video views dropped by 96%.

Amongst the top 10 athletes, **TikTok engagement is up 46%** and video views are up **102%**. For all players TikTok engagement overall is up 93%, but accounts for **less than 3% of posts**.

# Top Teams By Video Views & Engagement Combined

Rank Change		Team	Posts	Engagement	Video Views	AAV
(+14)	1	 Los Angeles Rams 	3.2K	40.7M	757.6M	\$1.3M
(-1)	2	 Philadelphia Eagles 	2.5K	54.1M	386.9M	\$6.3M
(+2)	3	 San Francisco 49ers 	2.5K	35.3M	267.1M	\$3.2M
(+10)	4	 Kansas City Chiefs 	2.8K	45.9M	227.6M	\$3.6M
(-2)	5	 Dallas Cowboys 	3.5K	29.2M	215.5M	\$3.6M
(+9)	6	 Los Angeles Chargers 	2.1K	20.6M	211M	\$2.4M
(-5)	7	 Buffalo Bills 	2.6K	22.9M	208.6M	\$2.5M
(-1)	8	 Seattle Seahawks 	2.7K	36.3M	208M	\$1.9M
(+2)	9	 New York Jets 	2.7K	22.7M	178.3M	\$1.7M
(-1)	10	 Baltimore Ravens 	4.1K	22.7M	172M	\$2.7M

## Market Intel

The Rams nearly doubled their number of posts and **increased TikTok** engagement by 75x over last year's first 8 weeks while the rest of the top 10 teams earned most of their engagement from Instagram.

Fan engagement (interactions + video views) is up 98% across the top 10 teams.

Amongst the top 10 teams **Instagram videos are up nearly 20%**, and TikTok videos are up **621%** (thanks to Ram's engagement success).

# 2023 Most Valuable Posts...So Far

**Bleacher Report** 3

He snagged Tom Brady's water bottle 🍷 #nfl #bluc via trent.h/TT

Subscribe: [www.youtube.com/user/BleacherReport?sub\\_confirmation=1](https://www.youtube.com/user/BleacherReport?sub_confirmation=1)  
Follow on IG: [www.instagram.com/f/bleacherreport](https://www.instagram.com/f/bleacherreport)  
Follow us on Twitter: [www.twitter.com/bleacherreport](https://www.twitter.com/bleacherreport)  
Like us on Facebook: [www.facebook.com/bleacherreport](https://www.facebook.com/bleacherreport)

08/06/23

\$6.5M MAV	18.2% PROMO QUALITY	\$1.2M AAV
15.6M	441.6K	3.6K

**\$1.2M**

8% of BR's AAV

[VIEW](#)

**15.6M Views**  
Kid snags Tom Brady's Juice.

- Funny
- Original
- Game day energy

**Los Angeles Chargers**

hyping up the crowd like a pro

this kid is hyping up the crowd like a pro.

#lachargers #chargers #shorts #funny #fans #fan #crowd #softstadium #kids #king #celebrate #celebration #excited #funnyshorts #hype #audience #bigscreen

10/08/23

\$2.6M MAV	23.6% PROMO QUALITY	\$606.0K AAV
9.7M	178.8K	836

**\$606K**

23% of Rams AAV

[VIEW](#)

**9.7M Views**  
Kid hypes the crowd.

- Hilarious & Heartwarming
- Kids/fan energy

**Atlanta Falcons** 1

Yo, Freddie Falcon is wild!

Freddie Falcon zip-lining over Mercedes-Benz Stadium on gameday | Atlanta Falcons

Subscribe to the Atlanta Falcons YouTube Channel: [bit.ly/2RIEKAW](https://bit.ly/2RIEKAW)

#AtlantaFalcons #RiseUp #NFL #Falcons

Download the Falcons app for breaking news, instant updates, and live streaming games: [atlantafalcons.com/app](https://atlantafalcons.com/app)

For more Falcons action: [www.atlantafalcons.com](https://www.atlantafalcons.com)  
Like us on Facebook: [www.facebook.com/atlantafalcons](https://www.facebook.com/atlantafalcons)  
Follow us on Twitter: [twitter.com/AtlantaFalcons](https://twitter.com/AtlantaFalcons)  
Follow us on Instagram: [www.instagram.com/atlantafalcons/](https://www.instagram.com/atlantafalcons/)

09/10/23

\$992.8K MAV	45.6% PROMO QUALITY	\$453.2K AAV
7.2M	180.7K	2.5K

**\$453K**

30% of Falcons AAV

[VIEW](#)

**7.2M Views**  
Freddie the Falcon Flies!

- Mascot fun
- Game day stunts

**ESPN** 2

Aaron Rodgers was injured and helped off the field on the first Jets drive vs. the Bills. [t.co/vtKHRW566V](https://t.co/vtKHRW566V)

09/11/23

\$2.5M MAV	9.6% PROMO QUALITY	\$237.6K AAV
5.5M	25.8K	2.9K

**\$227K**

9% of Ravens AAV

[VIEW](#)

**5.7M Views**  
Aaron Rodgers injury live.

- News in Real Time
- Player Injury

**Baltimore Ravens** 1

Name: @ZayFlowers

School: Boston College

Signing bonus...

@obj fell over 🤪🤪🤪🤪 [t.co/HrNbJnEjX](https://t.co/HrNbJnEjX)

08/30/23

\$1.4M MAV	16.3% PROMO QUALITY	\$227.3K AAV
5.4M	2.4K	56

**\$237K**

60X ESPN Avg

[VIEW](#)

**1.8M Views**  
Ravens go nuts over new recruit's signing bonus.

- Draft signing
- Explosive response
- Funny





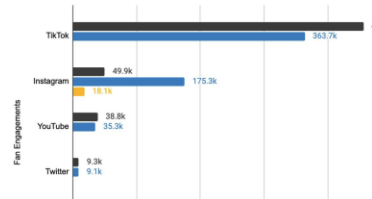


# What's Working

	Engagements Per Post						
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week 1	96.2k	100.9k	42.2k	54.3k	135.9k	71.6k	105.7k
Week 2	72.1k	105.7k	68.0k	49.5k	83.8k	50.0k	99.9k
Week 3	86.1k	91.3k	60.1k	48.6k	91.8k	51.2k	84.4k
Week 4	77.2k	95.1k	50.5k	59.3k	58.2k	29.7k	104.5k
Week 5	72.0k	77.0k	39.8k	49.0k	68.4k	26.6k	95.1k
Week 6	119.2k	68.7k	45.7k	63.8k	67.1k	38.9k	97.2k
Week 7	75.2k	78.8k	32.2k	48.0k	77.9k	66.1k	81.3k
Week 8	67.6k	77.2k	45.7k	53.1k	47.8k	50.8k	99.2k
TOTAL	83.6k	87.3k	47.6k	53.2k	79.9k	48.6k	96.1k
AVG	83.7k	86.8k	48.0k	53.2k	78.8k	48.1k	95.9k



Fan Engagement Per Post



## Sunday & Tuesday

Highest engagement per post, with league & team accounts. Nearly double that of Wed, Thurs and Sat.

## Video on Platform X

Posts are slightly down while engagement is up 5% from last season, but Video Views are up 50%.


## Instagram

84% of all engagements on Instagram were videos.

## TikTok

Over double the fan engagement of last year, with a new, younger audience.

**And in general... funny, unusual, heart-warming, behind the scenes content drives outsized engagement. Here are the most "viral" by platform...**



# Sponsorship

## Brand Exposure & Valuation





# Sponsorship Benchmarking



## \$306.7K

Average spend of an NFL team deal in 2023

*More than half of the deals have a floor of **50K** while **7%** of deals are **\$1M** or more.*



## 209

The average number of partners per team in 2023

*The average amount of partners per team that spend **\$1M** or more is **43**.*



# What Sponsors Are Buying?

## How Much Are They Spending On It?

	Deal Inclusion (YoY change)	Avg. by Spend (YoY Change)
Signage	49% (+1%)	41% (+19%)
Entitlements	60% (-)	<b>50% (+30%)</b>
Audio & Broadcast	57% (+1%)	42% (+22%)
Tickets/Hospitality	77% (+1%)	21% (+7%)
Digital	53% (-3%)	23% (+13%)
Promotions	48% (-1%)	15% (+8%)
Community	<b>18% (+6%)</b>	8% (+3%)
Print	15% (-1%)	3% (+2%)







# NFL Sponsorship Impact

**\$142.2M**

AAV

(+12.5% YoY)

**114.3K**

Branded Posts

(+8% YoY)

**12.6B**

Branded Engagements & Video Views

(+21% YoY)

**16.7%**

Promo Quality

(-7.3% YoY)

LEAGUE



**\$35.4M**  
AAV

TOP ATHLETE













**\$635.7K**  
AAV

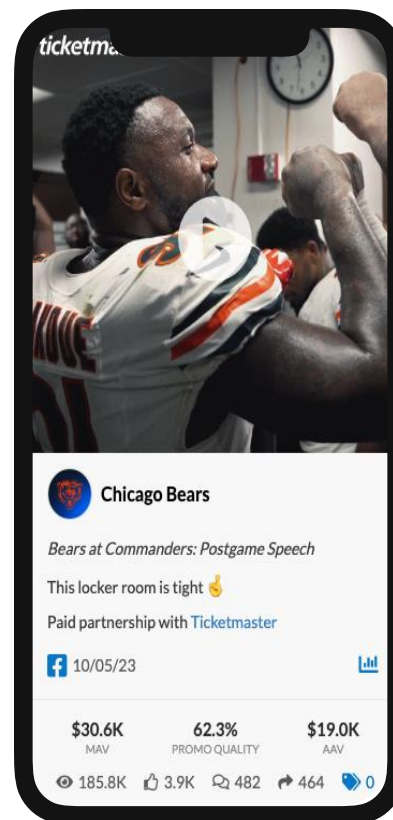
TOP TEAM



**\$6.3M**  
AAV

# Top 10 Brands Promoted In The NFL

Rank	SPONSOR	ADJUSTED AD VALUE	INTER-ACTIONS	VIDEO VIEWS	SHARE OF VALUE
1 (-)	 Nike	\$43,562,764	795.9M	6.4B	42.77%
2 (-)	 Gatorade	\$3,641,518	91.3M	1.3B	3.58%
3 (+2)	 Bud Light	\$2,008,315	22.6M	279.2M	1.97%
4 (+63)	 Ticketmaster	\$1,830,099	12.3M	144.7M	1.80%
5 (+4)	 Pepsi	\$1,735,692	21.6M	260.4M	1.70%
6 (+16)	 MetLife MetLife	\$1,336,430	8.7M	123.5M	1.31%
7 (+9)	 Ford	\$1,335,872	27.5M	302.9M	1.31%
8 (+20)	 DraftKings	\$1,315,817	10.4M	122.8M	1.29%
9 (+4)	 Hyundai Worldwide	\$1,312,361	6.4M	92.9M	1.29%
10 (-3)	 Verizon	\$1,221,414	16.8M	189.3M	1.20%



## Market Intel

**Ticketmaster, MetLife, Ford, Draft Kings, and Hyundai** are newcomers to the top 10 compared to last season.

### Ticketmaster grew in

- Rankings by 1,575%
  - AAV by 490%
  - Engagement by 359%
- Value primarily from teams accounts on Platform X.

### MetLife

The NFL and the New York Jets drove most of the branded posts and 121% increase in AAV on X.

### Ford

NFL teams drove 82% of the value Ford has earned since the start of the season. This value has been mostly earned on platform X from team posts, featuring Ford as a title sponsor.

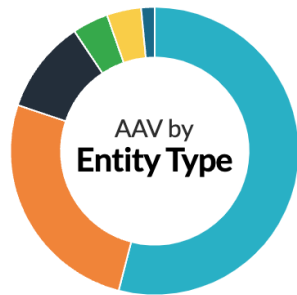
### Draft Kings

Their 5 top promoters drove 81% of value earned so far. Mostly, thanks to teams posting and tagging the brand on X including exclusive branded video outtakes.

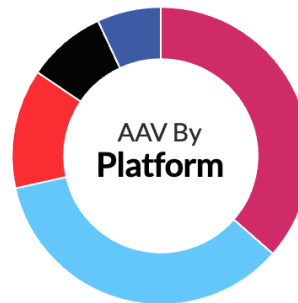
Data date range: 1 Aug, 2023 - 30 Oct 2023  
vs. 1 Aug, 2022 - 30 Oct 2022



# Where Value Comes From



Team	\$76.2M	54%
League	\$35.4M	26.2%
Media	\$14.7M	10.4%
Athlete	\$5.7M	4%
Sport Content Producer	\$5.4M	3.8%
Other	\$2.1M	1.5%



Instagram	\$51.4M	36.4%
Twitter	\$49.4M	35%
YouTube	\$18.3M	13%
TikTok	\$12.1M	8.6%
Facebook	\$9.8M	6.9%
Weibo	\$4.3K	0%

Teams drives nearly double the value on compared to any other group of entities. They account for **54%** of the total value.

Platform X (formerly Twitter) and Instagram drive a combined **71%** of total AAV in the NFL. Facebook drives only **26%** of the value.

Athletes drive **4%** of the overall AAV and they drive the most value on TikTok, **3.5%**, even though TikTok only accounts for 1.7% of branded posts

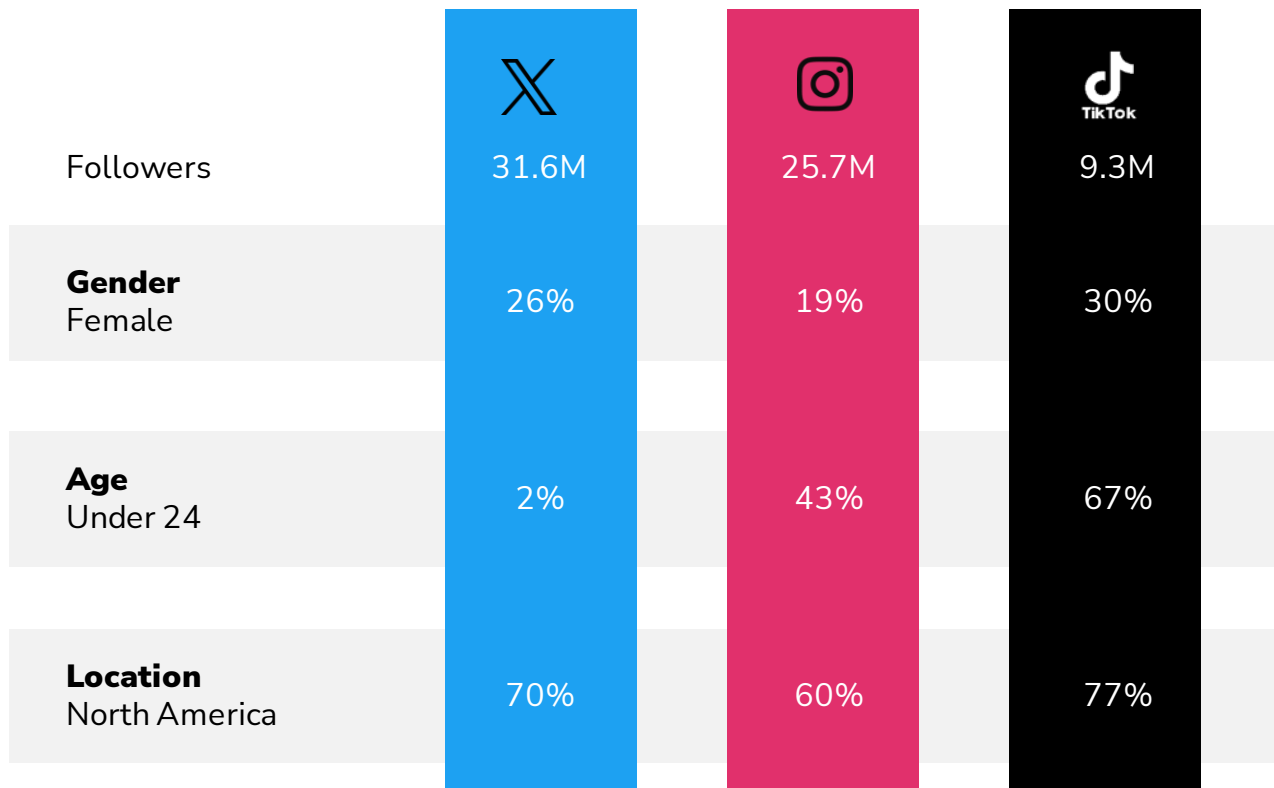


# Audience

## Demographics & Overlap



# Audience Profile / @NFL



## Market Intel

Each platform has a unique audience, and each partner within that platform will have unique characteristics

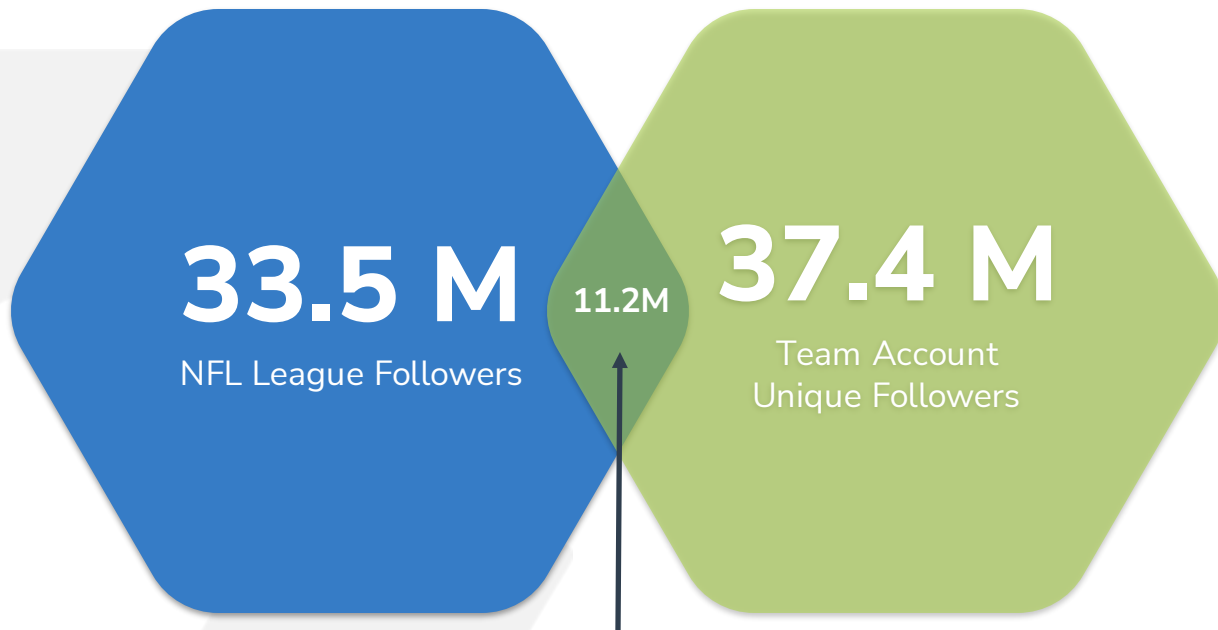
Use audience data to optimize content

**TikTok skews more female, younger and surprisingly North America**

**Each platform is becoming more global,** with an average of 4.6% less concentrated in in the United States, year over year.



# Audience Overlap



People that follow both the NFL account and at least one team account.

*Based on Twitter data as of Sept 30, 2023*

## ***Market Intel***

X (formerly Twitter) audience overlap between unique team audiences and NFL audiences is relatively small. **One in three NFL followers** also follows a team.

**26M people follow a team**, but do not follow the NFL, 22M follow the NFL but not a team.

**NFL has 66% audience uniqueness.**

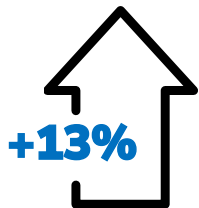
*Put it in Action-----*

→ Deals with both the NFL and teams will deliver the broadest audience.

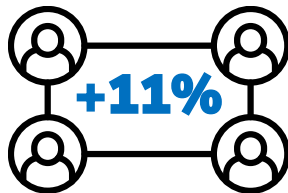
→ Opportunity for more NFL / Team cross-pollination



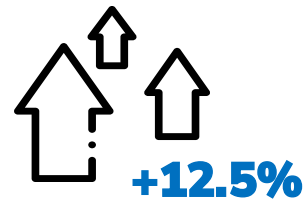
# Key Takeaways



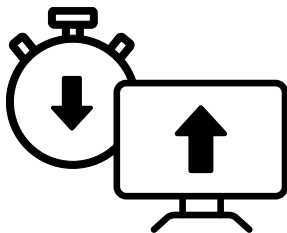
**Average spend on assets in deal inclusion vs 2022 (+13%).**



**The NFL had 11% Audience growth** (10M new followers) YoY - the majority of that growth came from TikTok(2.9M) and Instagram(2.86M).



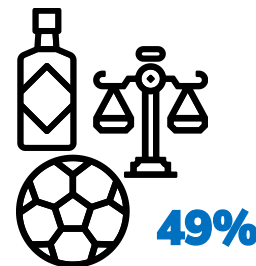
**Increase in value for brands,** despite small drop in number of branded posts and promo quality.



**Total engagement including Video Views is up 18%** more than double that of 2022 due to the increased adoption of TikTok, Instagram Reels and general trend of platforms pushing video.



**Teams** are driving majority (54%) of the value, most of that value (40%) comes from Platform X.



**Top 3 Categories** (Sporting Goods & Apparel, Beverage and Media & Comms) account for 49% of value generated.

# Thank You

Questions? Reach out to [info@koresoftware.com](mailto:info@koresoftware.com) or request our latest report; [2023 Market Intel Review of the Footwear Industry](#)

