



TOP SPONSORS REPORT

THE BIGGEST SPONSORSHIP SPENDERS

ESP Properties

TOP SPONSORS

A RECORD NUMBER OF COMPANIES—21—JOINED THE LIST OF BIGGEST U.S. SPONSORS IN 2015, BRINGING THE TOTAL NUMBER SPENDING MORE THAN \$15 MILLION TO 122, ACCORDING TO ESP'S ANNUAL SPENDING ANALYSIS.

The spending estimates for the companies on the list reflect amounts spent on sponsorship fees of U.S. properties and the portion of spending on international properties that is directed to the U.S. market.

This report includes:

- A look at activity among the top twenty largest sponsors
- Companies with the biggest changes in spending, both positive and negative
- Who's new to the list and who dropped off
- Spending estimates for each of the 122 sponsors
- Most active categories and biggest spenders by category

U.S. TOP 20

THE TOP FOUR SPONSORS REMAINED IN THE SAME ORDER AS 2014, BUT A SECOND CONSECUTIVE BIG BOOST IN SPENDING—LED BY A RENEWAL AND FEE INCREASE FOR ITS NFL DEAL—SAW NUMBER TWO ANHEUSER-BUSCH INBEV ALMOST EQUAL PERENNIAL NUMBER ONE PEPSICO, INC. AND OPEN A SIZABLE GAP BETWEEN ITSELF AND THE THIRD LARGEST SPONSOR, THE COCA-COLA CO.

Last year's number five sponsor General Motors Co. fell to number nine after dropping its NFL sponsorship—one spot below rival Ford Motor Co.

AMOUNT	COMPANY	2015 RANK	2014 RANK
\$370M-\$375M	PepsiCo, Inc.	1	1
\$360M-\$365M	Anheuser-Busch InBev	2	2
\$275M-\$280M	The Coca-Cola Co.	3	3
\$260M-\$265M	Nike, Inc.	4	4
\$200M-\$205M	AT&T, Inc.	5	6
\$195M-\$200M	Toyota Motor Sales U.S.A., Inc.	6	7
\$190M-\$195M	Adidas North America, Inc.	7	9
\$155M-\$160M	Ford Motor Co.	8	8
\$150M-\$155M	General Motors Co.	9	5
\$145M-\$150M	Verizon Communications, Inc.	10	10
\$125M-\$130M	MillerCoors LLC	11	11
\$95M-\$100M	FedEx Corp.	12	12
\$85M-\$90M	Microsoft Corp.	13	14
	The Procter & Gamble Co.	14	13
\$80M-\$85M	Bank of America Corp.	15	16
	Citigroup, Inc.	—	17
	Hyundai Motor America	—	58
\$75M-\$80M	Berkshire Hathaway, Inc.	18	19
\$70M-\$75M	Sprint Corp.	19	15
\$65M-\$70M	The Allstate Corp.	20	21

BIGGEST MOVERS

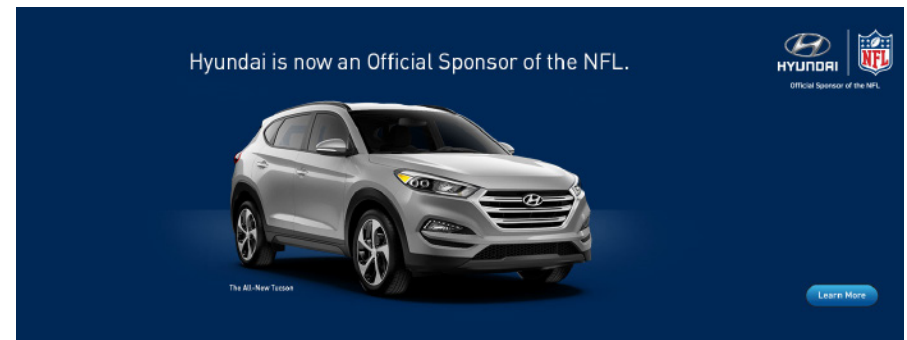
UNLIKE THE PAST TWO YEARS, WHEN NONE OF THE COMPANIES AT THE TOP OF THE CHART DECREASED SPENDING, FOUR OF 2014'S TOP 20 SPONSORS CUT THEIR BUDGETS IN 2015: COKE, GM, SPRINT CORP. AND UNITED PARCEL SERVICE.

While Sprint's spending trim was minor, the other three saw eight-figure declines, primarily due to GM letting go of the NFL, Coke exiting from *American Idol*, and UPS—which fell from number 18 to number 32—dropping its longtime primary sponsorship with the Roush Fenway Racing NASCAR team.

Moving in the other direction, sponsors with the biggest increases in spending in 2015 were A-B InBev; Adidas North America, Inc.; and Hyundai Motor America.

While league sponsorships with the NFL accounted for most of A-B and Hyundai's increases, bigger commitments to its college and university athletics deals drove Adidas' spending—moving the company past Ford into the number eight position.

Hyundai's official NFL sponsorship saw the company jump from number 58 in 2014 to number 15 in 2015.



ARRIVALS

COMPANY	2015 SPENDING
Charter Communications, Inc.	\$25M-\$30M
DraftKings, Inc.	\$20M-\$25M
Heineken USA	
Monster Beverage Corp.	
The Swatch Group Ltd.	
AdvoCare International, L.P.	
Bacardi U.S.A., Inc.	
Chick-fil-A, Inc.	
Continental AG	
Cox Enterprises, Inc.	
EMC Corp.	
The Emirates Group	
Kaiser Foundation Health Plan, Inc.	
Kimberly-Clark Corp.	
LG Group	
Sherwin-Williams Co.	
Stanley Black & Decker, Inc.	
Starwood Hotels & Resorts Worldwide, Inc.	
VF Corp.	
Wal-Mart Stores, Inc.	

The 21 companies joining the list are a diverse group and include “boomerang” sponsors Sherwin-Williams Co. and Stanley Black & Decker, Inc., which returned to the top sponsor ranks after a two-year and one-year absence, respectively.

DEPARTURES

SIX COMPANIES ON THE 2014 LIST DID NOT MAKE IT IN 2015: THE HOME DEPOT, INC.; TIME WARNER INC.; HEWLETT-PACKARD CO.; PANASONIC CORP. OF NORTH AMERICA; GENERAL MILLS, INC.; AND MENARD, INC.

Home Depot, the highest ranked 2014 sponsor (number 55) to fall off the list, ended its primary sponsorship with the Joe Gibbs Racing NASCAR team.

Time Warner was replaced in the rankings by Charter Communications, Inc., the company that acquired Time Warner Cable and its sponsorships.

Hewlett-Packard's sponsorships are now split between its two successor companies—Hewlett Packard Enterprise and HP Inc.—with neither spending more than \$15 million in 2015.



TOP U.S. SPONSORSHIP SPENDERS

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\$80M-\$85M	Bank of America Corp.	15	16
	Citigroup, Inc.	—	17
	Hyundai Motor America	—	58
\$75M-\$80M	Berkshire Hathaway, Inc.	18	19
\$70M-\$75M	Sprint Corp.	19	15
\$65M-\$70M	The Allstate Corp.	20	21
\$60M-\$65M	J. P. Morgan Chase & Co.	21	20
	Under Armour, Inc.	—	32
\$55M-\$60M	American Express Co.	23	28
	Capital One Financial Corp.	—	33

TOP U.S. SPONSORSHIP SPENDERS (CONT.)

AMOUNT	COMPANY	2015 RANK	2014 RANK
\$55M-\$60M (continued)	Dr Pepper Snapple Group Inc.	—	25
	MasterCard Int'l, Inc.	—	26
	McDonald's Corp.	—	27
	Mercedes-Benz USA, LLC	—	30
	State Farm Cos.	—	22
\$50M-\$55M	Comcast Corp.	30	41
	T-Mobile	—	35
\$45M-\$50M	Bridgestone Americas, Inc.	32	34
	Lowe's Cos.	—	23
	Nationwide Financial Services, Inc.	—	39
	Samsung Electronics America, Inc.	—	31
	SAP America, Inc.	—	36
	Target Corp.	—	29
	United Parcel Service	—	18
	Visa	—	24
	Wells Fargo & Co.	—	38
\$40M-\$45M	American Honda Motor Co.	41	42
	Mars, Inc.	—	37
	Shell Oil Co.	—	40
\$35M-\$40M	Diageo North America, Inc.	44	52
	Kia Motors America, Inc.	—	43
	SIRIUS XM Radio, Inc.	—	44
	United Continental Holdings, Inc.	—	46
	Yum! Brands, Inc.	—	45

AMOUNT	COMPANY	2015 RANK	2014 RANK
\$30M-\$35M	Barclays Bank PLC	49	48
	Bose Corp.	—	51
	Delta Air Lines, Inc.	—	59
	The Goodyear Tire & Rubber Co.	—	49
	Nestlé USA, Inc.	—	57
	Northwestern Mutual Life Insurance Co.	—	50
	Unilever United States, Inc.	—	56
\$25M-\$30M	American Airlines	56	69
	BMW of North America, LLC	—	65
	BP America, Inc.	—	53
	Charter Communications, Inc.	—	—
	FCA US LLC	—	64
	Enterprise Holdings, Inc.	—	81
	Exxon Mobil Corp.	—	63
	MetLife, Inc.	—	61
	Nissan	—	68
	Oracle	—	47
	Papa John's Int'l, Inc.	—	66
PNC Financial Services Group, Inc.	—	72	
\$20M-\$25M	3M Co.	68	54
	Aaron's, Inc.	—	78
	Burger King	—	70
	Chevron Corp.	—	85
	DraftKings, Inc.	—	—

TOP U.S. SPONSORSHIP SPENDERS (CONT.)

AMOUNT	COMPANY	2015 RANK	2014 RANK
\$20M-\$25M (continued)	Heineken U.S.A.	—	—
	The Hershey Co.	—	84
	IBM Corp.	—	67
	Kellogg's	—	88
	Kraft Foods	—	96
	Kroger	—	104
	Marriott Hotels	—	83
	Monster Beverage Corp.	—	—
	New Era	—	90
	Quicken Loans, Inc.	—	74
	Red Bull North America, Inc.	—	86
	Sony Corp. of America	—	71
	Sunoco, Inc.	—	80
	The Swatch Group Ltd.	—	—
	Volkswagen AG	—	—
\$15M-\$20M	AdvoCare International, L.P.	88	—
	Bacardi U.S.A., Inc.	—	—
	Bass Pro, Inc.	—	62
	BBVA	—	76
	Caterpillar, Inc.	—	98
	Chick-fil-A, Inc.	—	—
	Cisco Systems, Inc.	—	105
	The Clorox Co.	—	89
	Continental AG	—	—
	Cox Enterprises, Inc.	—	—
	EMC Corp.	—	—

AMOUNT	COMPANY	2015 RANK	2014 RANK
\$15M-\$20M (continued)	The Emirates Group	88	—
	Federated Department Stores	—	97
	General Electric Co.	—	100
	Go Daddy	—	87
	Hilton Hotels	—	106
	InterContinental Hotels Group PLC	—	103
	Kaiser Foundation Health Plan, Inc.	—	—
	Kimberly-Clark Corp.	—	—
	Lenovo Group Ltd.	—	102
	LG Group	—	—
	Lucas Oil	—	91
	Mondeléz International, Inc.	—	94
	Montres Rolex S.A.	—	101
	News Corp.	—	95
	NRG Energy, Inc.	—	93
	Sherwin-Williams Co.	—	—
	The Scotts Company LLC	—	—
	Stanley Black & Decker, Inc.	—	—
	Starwood Hotels and Resorts Worldwide, Inc.	—	—
	Subway Restaurants	—	99
	U.S. Bank	—	107
	VF Corp.	—	—
	Wal-Mart Stores, Inc.	—	—
	Zurich American Insurance Co.	—	77

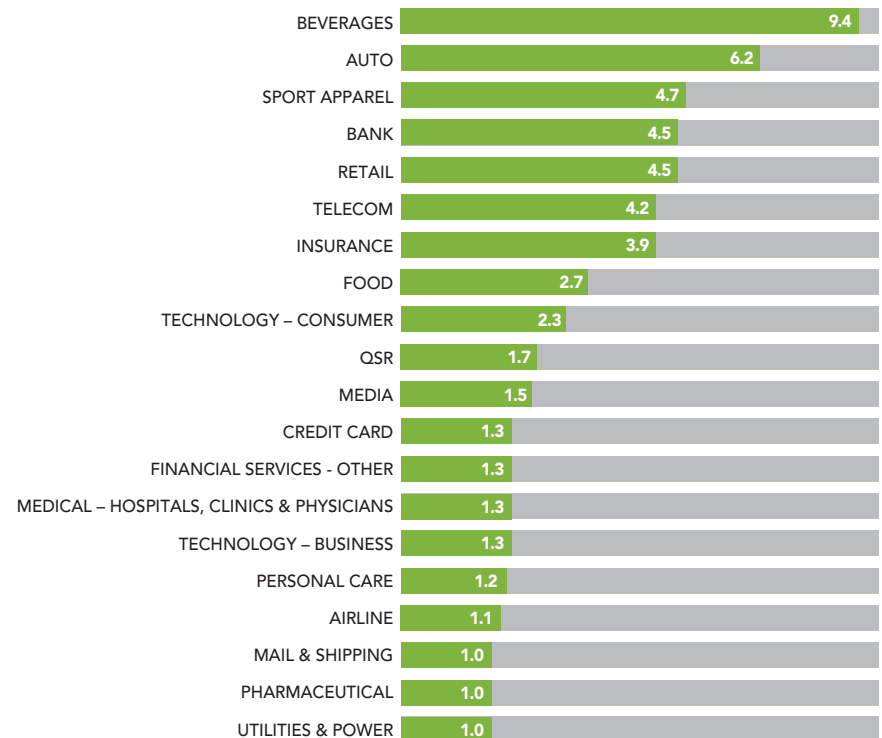
TOP CATEGORIES

Reported as an index, the list of the 20 categories that spend the most on U.S. sponsorships is again topped by beverages. The category spends 9.4 times the average of all 70 categories.

As it was in 2014, the 11 biggest spenders of 2015 belong to just four categories—beverage, auto, sport apparel and telecommunications.

Categories with the most companies represented among the 122 biggest sponsors: auto (11 companies); beverage (10 companies, up from seven in 2014 with the addition of Heineken USA, Monster Beverage Corp. and Bacardi U.S.A., Inc.); and bank (nine companies).

**TOP 20 CATEGORIES
BY SPONSORSHIP SPEND IN THE U.S.**







AUTO CATEGORY TOP SPENDERS

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
 TOYOTA	<ul style="list-style-type: none"> • Joe Gibbs Racing • Michael Waltrip Racing • Toyota Center/ Houston Rockets 	\$175M-\$180M ▲	\$195M-\$200M
	<ul style="list-style-type: none"> • Wood Brothers Racing • AT&T Stadium/ Dallas Cowboys • Roush Fenway Racing 	\$155M-\$160M ►	\$155M-\$160M
	<ul style="list-style-type: none"> • Hendrick Motorsports • MLB • Walt Disney Parks and Resorts 	\$190M-\$195M ▼	\$150M-\$155M
 HYUNDAI	<ul style="list-style-type: none"> • NFL • Hyundai Tournament of Champions • 24 NCAA Colleges 	\$25M-\$30M ▲	\$80M-\$85M
 Mercedes-Benz	<ul style="list-style-type: none"> • USTA U.S. Open • PGA of America • Mercedes-Benz Superdome/New Orleans Saints 	\$50M-\$55M ▲	\$55M-\$60M

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
 HONDA	<ul style="list-style-type: none"> • The Honda Classic • Honda Center/ Anaheim Ducks • NHL 	\$35M-\$40M ▲	\$40M-\$45M
	<ul style="list-style-type: none"> • NBA • New York Knicks • New York Rangers 	\$35M-\$40M ►	\$35M-\$40M
	<ul style="list-style-type: none"> • BMW Championship • USOC • Houston Texans 	\$25M-\$30M ►	\$25M-\$30M
	<ul style="list-style-type: none"> • Pro Rodeo Cowboys Assn. • Winter X Games • Dodge presents: Motley Crue: The Final Tour 	\$25M-\$30M ►	\$25M-\$30M
	<ul style="list-style-type: none"> • NCAA • Nissan Stadium Tennessee Titans • College Football Playoff Series 	\$20M-\$25M ▲	\$25M-\$30M
	<ul style="list-style-type: none"> • MLS • U.S. Ski & Snowboard Assn. • The Museum of Modern Art 	\$20M-\$25M ►	\$20M-\$25M



BANK CATEGORY TOP SPENDERS

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
 Bank of America	<ul style="list-style-type: none"> • MLB • Bank of America Stadium/Carolina Panthers • New England Patriots 	\$75M-\$80M	▲ \$80M-\$85M
 Citi	<ul style="list-style-type: none"> • Citi Field/New York Mets • Live Nation • Citi Bike 	\$70M-\$75M	▲ \$80M-\$85M
 CHASE	<ul style="list-style-type: none"> • USTA U.S. Open • Madison Square Garden • Walt Disney Parks and Resorts 	\$60M-\$65M	▶ \$60M-\$65M
 Capital One	<ul style="list-style-type: none"> • NCAA • Capital One Orange Bowl • College Football Playoff Series 	\$45M-\$50M	▲ \$55M-\$60M
 WELLS FARGO	<ul style="list-style-type: none"> • Wells Fargo Championship • Staples Center/ Los Angeles Lakers/ Los Angeles Kings • MLS 	\$40M-\$45M	▲ \$45M-\$50M





COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
 BARCLAYS	<ul style="list-style-type: none"> • NFL • Barclays Center/ Brooklyn Nets/ New York Islanders • The Barclays 	\$30M-\$35M	▶ \$30M-\$35M
 PNC	<ul style="list-style-type: none"> • Soldier Field/ Chicago Bears • PNC Arena/ Carolina Hurricanes • PNC Park/ Pittsburgh Pirates 	\$20M-\$25M	▲ \$25M-\$30M
 BBVA	<ul style="list-style-type: none"> • NBA • BBVA Compass Stadium/Houston Dynamo • Houston Rockets 	\$20M-\$25M	▼ \$15M-\$20M
 usbank	<ul style="list-style-type: none"> • Target Field/ Minnesota Twins • Minnesota Vikings • Denver Broncos 	\$15M-\$20M	▶ \$15M-\$20M

BEVERAGE CATEGORY TOP SPENDERS

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
	<ul style="list-style-type: none"> NFL NBA MLB 	\$355M-\$360M ▲	\$370M-\$375M
	<ul style="list-style-type: none"> NFL SFX Entertainment NBA 	\$300M-\$305M ▲	\$360M-\$365M
	<ul style="list-style-type: none"> NCAA PGA TOUR Speedway Motorsports, Inc. 	\$290M-\$295M ▼	\$275M-\$280M
	<ul style="list-style-type: none"> NHL Penske Racing AT&T Stadium/ Dallas Cowboys 	\$115M-\$120M ▲	\$125M-\$130M
	<ul style="list-style-type: none"> College Football Playoff Series Dallas Cowboys BK Racing 	\$50M-\$55M ▲	\$55M-\$60M
	<ul style="list-style-type: none"> NBA NHL New York Yankees 	\$30M-\$35M ▲	\$35M-\$40M
	<ul style="list-style-type: none"> Floyd Mayweather vs. Manny Pacquiao USTA U.S.Open MLS 	—	▲ \$20M-\$25M

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
	<ul style="list-style-type: none"> Joe Gibbs Racing Monster Energy AMA Supercross X Games 	—	▲ \$20M-\$25M
	<ul style="list-style-type: none"> Red Bull Arena/ New York Red Bulls MLS Lollapalooza 	\$20M-\$25M ▶	\$20M-\$25M
	<ul style="list-style-type: none"> American Airlines Arena/ Miami Heat Marlins Park/ Florida Marlins PGA TOUR 	—	▲ \$15M-\$20M

TELECOMMUNICATIONS CATEGORY TOP SPENDERS

COMPANY	TOP DEALS	2014 SPEND	2015 SPEND
	<ul style="list-style-type: none"> • College Football Playoff Series/ National Championship • NCAA • AT&T Stadium/ Dallas Cowboys 	\$185M-\$190M	▲ \$200M-\$205M
	<ul style="list-style-type: none"> • NFL • NBA • MetLife Stadium 	\$120M-\$125M	▲ \$145M-\$150M
	<ul style="list-style-type: none"> • NASCAR Sprint Cup Series • NBA • Sprint Center 	\$75M-\$80M	▼ \$70M-\$75M
	<ul style="list-style-type: none"> • MLB • SFX Entertainment • Seattle Mariners 	\$40M-\$45M	▲ \$50M-\$55M

ABOUT ESP PROPERTIES

Building on the 35-year legacy of sponsorship pioneer IEG, ESP Properties--a WPP Company--was founded in 2015 as a new type of agency dedicated to helping properties unlock more value from their audiences, media and brand partnerships.

While continuing to provide thought leadership across the industry through the annual conference, publications, webinars, etc., ESP Properties works directly with rightsholder clients to grow revenue from their commercial programs by taking advantage of digital and data-driven changes in the media landscape.

In addition to providing partnership valuation and packaging strategies, our consulting team works with clients in the areas of data, digital content and fan engagement to better understand audiences and create more relevant ways to connect with them. This provides brand partners more meaningful engagement with fans and followers.

With extensive contacts and deep insights into what it takes to create successful partnerships, our sales team provides rightsholders with partnership strategy and sales representation to the world's most active sponsors.

For more information about the value of sponsorships and partnerships, as well as ESP services, insights, training and events, please visit www.sponsorship.com, call 312/725-5100, or call Ryan Smith at 312/725-5136.



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