

MAKING AN IMPACT WITH NIL

2023

Few things have changed the landscape of college sports like name, image, and likeness (NIL). Since student-athletes gained the right to monetize their NIL, LEARFIELD has been delivering solutions that empower brand partners to maximize NIL opportunities for student-athletes in the ever-evolving ecosystem of college athletics.

LEARFIELD is at the forefront of all things NIL:

- Student-Athlete Influencer Marketing Opportunities with Brand Sponsors
- Premium Media and Original Content Development
- NIL Literacy and Student-Athlete Resources
- Brand Building and Group Licensing
- Digital and Technology Platforms

Data-driven strategies and expertise, combined with the ability to integrate university intellectual property (IP) with athlete influencer marketing programs, position LEARFIELD as the trusted authority in delivering guidance, innovative programs, fan engagement, and results.

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From licensing to brand deals to custom content with student-athletes, LEARFIELD is powering the NIL ecosystem with proven results.



~Solly Fulp, EVP – NIL Growth and Development, LEARFIELD

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NIL BY THE NUMBERS

\$8M+

Earnings by
Student-Athletes
Through LEARFIELD
Sponsors

250+

Sponsorships
Incorporating NIL

75+

Schools/Properties
Participating in
Allied/NIL IP
Sponsorship Deals

1K+

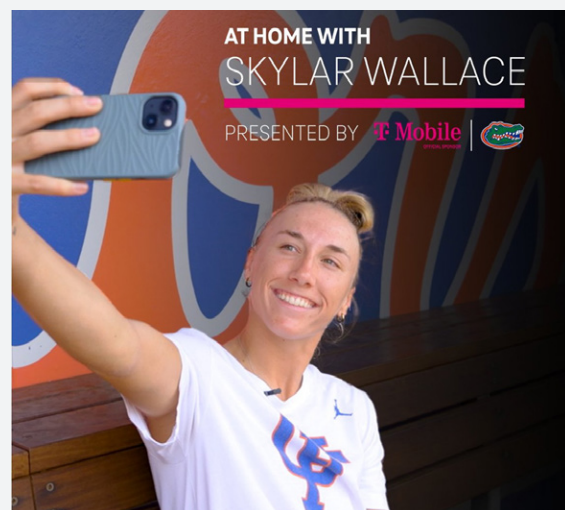
Student-Athletes
Impacted by LEARFIELD
Sponsorships

*Activity for '22/'23 Academic Year

UNIVERSITY IMPACT THROUGH LEARFIELD ALLIED

In 2021, LEARFIELD launched its Allied Initiative, providing approved use of university intellectual property (IP) rights to sponsors in combination with student-athlete NIL.

The LEARFIELD Allied offering provides national and local brands the opportunity to create deeper fan connections by combining university IP with the brand's engagement of student-athlete NIL in official marketing campaigns.



ALLIED+

LEARFIELD launched its Allied+ program to provide additional solutions for university partners seeking elevated resources to support NIL initiatives. Through Allied+, LEARFIELD offers a dedicated, on-campus NIL business manager to help sponsors activate marketing campaigns featuring student-athletes. To date, ten universities have implemented an Allied+ strategy to maximize brand activations, and optimize student-athletes' experience for personal and professional growth. More Allied+ positions are onboarding with school partners in the coming months.



NIL SECONDARY IP

To maximize opportunities for brands of all sizes to connect with college sports fans through student-athlete influencers, LEARFIELD has worked with several partner schools to develop a secondary NIL specific logo for use with smaller sponsorships, particularly those with local community businesses. LEARFIELD'S secondary NIL IP empowers brands and institutions to activate approved use of college logos in NIL deals, while also protecting the value of a university's primary IP by creating more defined marketing parameters.



Supporting our student-athletes and their NIL activities is incredibly important at Wisconsin. Hundreds of Badger student-athletes have benefited from the use of their name, image or likeness over the past two years. I am very proud of the efforts our Athletic Department and LEARFIELD's Badger Sports Properties team has put forth in the NIL space and that will only continue to grow.



~Chris McIntosh, Director of Athletics
University of Wisconsin



LEARFIELD ALLIED+ Staff

COLLECTIVES



While the role of collectives differs at each university, many have elected to

invest in official sponsorships to elevate their missions through approved athletic marketing channels. LEARFIELD currently works with 50+ collectives across 45+ universities who wish to promote their activities to current and potential members and donors. These sponsorships help ensure alignment with the university on use of IP and messaging to fans.

INNOVATIVE RESOURCES AND STUDENT-ATHLETE DEVELOPMENT

LEARFIELD has worked with its university partners to identify and develop solutions to meet their NIL needs. These solutions may be scalable across various institutions or customized to meet the individual needs of the respective university.

SCHOOL PARTNER INSIGHTS SESSIONS

LEARFIELD hosts regular virtual sessions open to all athletic directors and key staff from partner institutions to provide industry insights and best practices with respect to NIL. These sessions offer a platform to update partner universities on new developments in the constantly changing NIL landscape and share NIL success stories and learnings from LEARFIELD partnerships.

EDUCATION SERVICES

To address a growing need to educate student-athletes in the world of NIL, LEARFIELD has been developing a curriculum to provide additional education for all student-athletes interested in maximizing NIL opportunities.



ON CAMPUS RESOURCE CENTERS

As more universities seek to aggregate NIL functions to serve their student-athletes' NIL needs more efficiently, LEARFIELD has worked with athletic departments to develop or support physical centers of excellence. The most prominent of these is the Alabama Advantage Center. This first-of-its-kind hub opened in Fall 2023 and serves as the epicenter of support for NIL endeavors for all Alabama students.

We are committed to providing the best resources for our UAB student-athletes to maximize their NIL opportunities, and our dedicated LEARFIELD and Allied+ staff have been an asset in working with brands and local businesses that want to integrate our athletes into their marketing programs.



~Mark Ingram, Associate VP & Director of Athletics, University of Alabama, Birmingham

“NIL has provided great learning opportunities for our student-athletes giving them real world experience in business, brand management, and financial literacy. Our student-athletes have enjoyed much success engaging in local and national marketing campaigns with LEARFIELD partners.

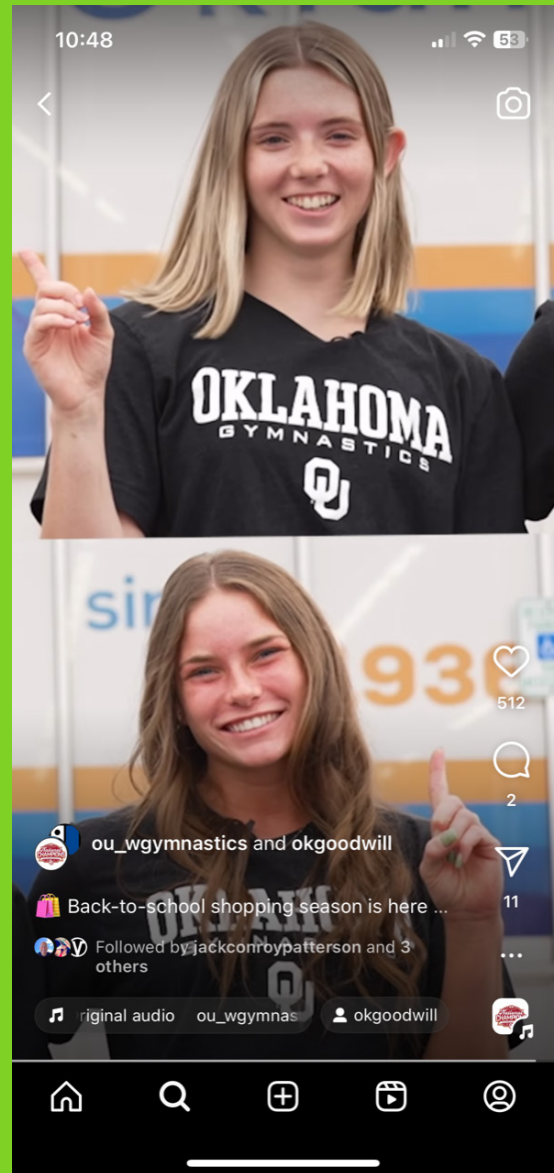


~Gene Smith, Senior Vice President & Wolfe Foundation, Endowed Athletic Director, The Ohio State University

STUDENT-ATHLETE IMPACT

While LEARFIELD does not represent student-athletes, it delivers opportunities for student-athletes to work with trusted brand partners and university sponsors as influencers or ambassadors. Whether it is a national campaign or a local market activation, the student-athletes' ability to work with brand partners using approved school IP elevates their brand through fan engagement. Additionally, LEARFIELD brand partners have executed numerous team-wide deals that impact the entire roster, expanding the reach of NIL opportunities across more student-athletes. Many sponsorships have also provided opportunities for a diverse representation of student-athletes, with 50% of top sport participants including women's sports.

More importantly, LEARFIELD is enriching the student-athlete experience through the opportunities made available by brand sponsors. Participating in student-athlete influencer marketing offers real-world experience and connections to brands that provide invaluable learnings and networking opportunities they can leverage in the future. The soft skills student-athletes are enhancing through these opportunities include personal brand development, contract literacy, responsibility for activation and fulfillment, the value of relationships, and how NIL can assist in transitioning to a career after graduation. Due to the rigorous schedule of a student-athlete – balancing training, competition, and academics – these opportunities and business experiences are often not readily available.



TOP SPORTS FOR NIL ACTIVITY

Via LEARFIELD Sponsors

- 1. Football
- 2. Men's Basketball
- 3. Women's Basketball
- 4. Men's Track & Field
- 5. Softball
- 6. Women's Gymnastics

“NIL has profoundly transformed my life. Through it, I've connected with new people, brands, and companies, achieving more than I imagined. The newfound knowledge in savings, investing, and financial stability is empowering and sets me up for a successful future.”

~Audrey Davis, Gymnast
University of Oklahoma

SOURCE: Opendorse Marketplace Activity

Wendy's Kansas City stores excel in sales, credited partly to our LEARFIELD partnership and early NIL adoption with Kansas student-athletes. As our partnership expands, athletes are now proactively joining our campaigns. Student-athletes showing interest in becoming Wendy's athletes is a positive sign in the evolving NIL landscape, affirming our successful approach.



~ Kirk Williams, Owner
 Wendy's/Legacy Group Restaurant



BRAND IMPACT

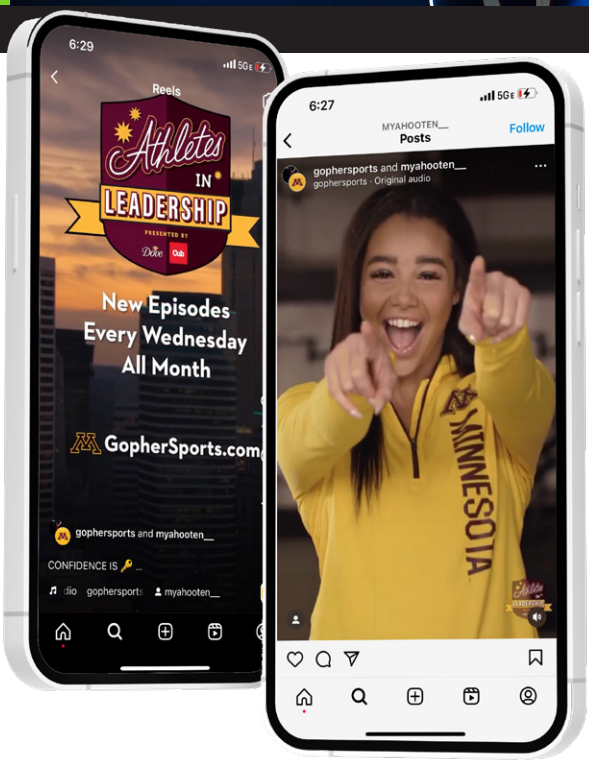
Student-athlete marketing and activation, combined with the approved use of university IP available through LEARFIELD, delivers an authentic connection to fans, expanding brand reach and effectiveness.

This past year, 250+ companies executed sponsorships utilizing student-athlete influencers, with the demand increasing exponentially for the current academic year. Of those companies, 41% were new to the college space, making their first investment in college sports through student-athlete influencer marketing.

LEARFIELD is using marketplace platform Opendorse to help brand partners engage student-athletes in their marketing campaigns. Currently, more than 60 LEARFIELD

schools have launched custom-branded Opendorse marketplaces.

LEARFIELD has been working hand in hand with brands to allow them to successfully capitalize on the opportunity to use student-athletes in their sponsorship campaigns. These influencers have been used for social media campaigns, personal appearances, promotional signage, and other traditional advertising and marketing mediums. Original content, created by the student-athletes themselves or via LEARFIELD Studios, has become a core element of many sponsorship campaigns, delivering a deeper connection to fans and consumers and yielding higher engagement rates and impressions.



LEARFIELD's NIL Social Media Amplification capabilities have boosted the delivery of NIL content to millions of known fans across the country. By utilizing paid social to amplify student-athlete posts, both brands and student-athletes can reach a much larger, relevant audience with brand messaging that resonates with fans at scale.

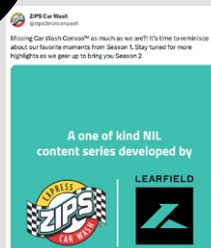
INNOVATIVE NIL SOLUTIONS

LEARFIELD STUDIOS - ORIGINAL CONTENT

Original content enables authentic, emotional connections between schools, student-athletes, brands, and college fans. LEARFIELD Studios is a best-in-class content division focused on brand storytelling that provides an inside look at the athletic programs, people, and traditions that bring college sports to life.

Longer form branded content through custom-developed docuseries provides sustained connections to fans through multi-episode features with compelling stories. Content is a core element of brand campaigns and can be the differentiating factor for student-athlete marketing moving forward.

LEARFIELD Studios delivers high-end content production and data-driven distribution to engage fans year-round through various platforms. The Studios team has created numerous sponsor campaigns that have been activated across company and student-athlete social channels with engagement rates that outpace industry benchmarks.

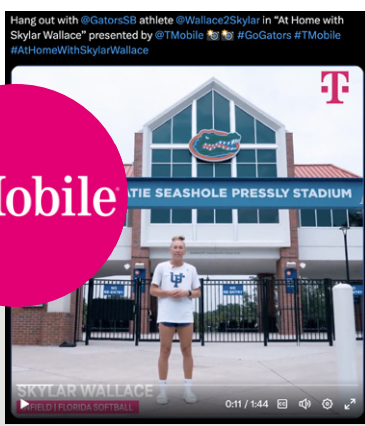


DAY IN THE LIFE
PRESENTED BY T-MOBILE

1.4M
IMPRESSIONS

630K
VIDEO VIEWS

2
STUDENT-ATHLETES



ZIPS CARWASH

4.7M
IMPRESSIONS

1.9M
VIDEO VIEWS

12
STUDENT-ATHLETES

THOSE WHO STAY
PRESENTED BY CHEEZ-IT

14M
IMPRESSIONS

5M
VIDEO VIEWS

7
STUDENT-ATHLETES



TEAM DUNKIN'

25M
IMPRESSIONS

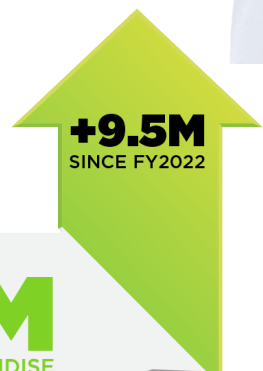
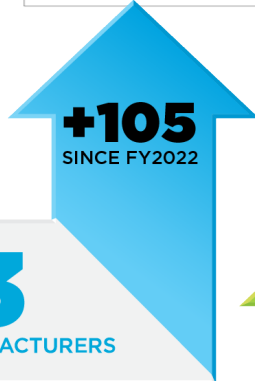
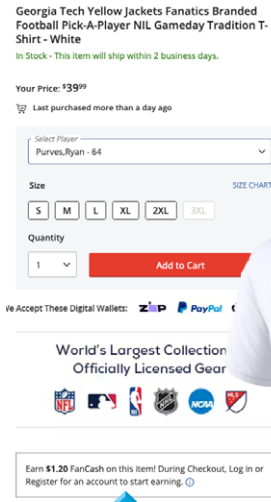
12.5M
VIDEO VIEWS

50
STUDENT-ATHLETES

LICENSED MERCHANDISE

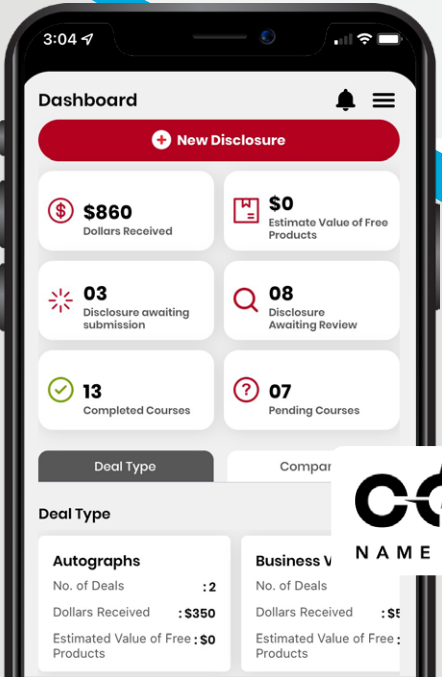
LEARFIELD's trademark licensing division, CLC, has worked with hundreds of collegiate institutions to proactively implement policies and guidelines related to university-branded merchandise that contains student-athlete NIL. This allows licensees to more efficiently develop merchandise, increasing opportunities for student-athletes and improving speed-to-market for fans. Over the past year, the number of licensed manufacturers producing NIL products more than doubled, and retail sales of university-branded NIL merchandise grew by over \$10 million.

Leveraging its trusted licensing deal management and tracking systems, CLC created and launched the COMPASS platform in 2021, providing universities with an integrated NIL education and deal disclosure service.



183
NIL LICENSED MANUFACTURERS

\$10.5M
SALES OF NIL MERCHANDISE



COMPASS
NAME | IMAGE | LIKENESS

DEAL MANAGEMENT PLATFORMS

Licensees and athlete representation organizations also use COMPASS to provide an opt-in platform for licensing deals, making engaging student-athletes at scale in merchandise programs easier. Additionally, CLC can work with LEARFIELD's sister division, SIDEARM Sports, to streamline access to team rosters to verify players and teams.

OneTeam Partners, a student-athlete-focused agency, utilized the COMPASS platform to manage athlete opt-ins for NIL licensing deals, including NIL licensing programs with Fanatics for jerseys and t-shirts. COMPASS will also be the trusted platform to engage student-athletes for participation in the upcoming EA Sports College Football video game.

WE'RE JUST GETTING STARTED...

Opportunities for student-athletes to participate in commercial ventures using their NIL will increase. The key will be ensuring those opportunities are a win-win-win for universities, brands, and student-athletes while connecting with fans.

The evolving state laws and school guidelines ensure that the NIL landscape will continue to change. LEARFIELD is committed to being at the forefront of NIL opportunities and providing trusted solutions and counsel to university partners and brands.



LEARFIELD leaders are working to shape the NIL dialogue at the national and local levels, including this July 20 meeting between LEARFIELD President & CEO, Cole Gahagan, and US Senator Cory Booker following the Senator's introduction of a working draft of his NIL bill.

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LEARFIELD is committed to being the authority on NIL deals, providing solutions for our university and brand partners, and leading the conversations impacting college athletics. If it's happening in college sports, particularly in the NIL landscape, we are powering it.



*~Cole Gahagan, President & CEO,
LEARFIELD*

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LEARFIELD

For more information on LEARFIELD's NIL solutions or to explore opportunities for brand sponsorships, contact:

nil@learfield.com or visit www.learfield.com/allied