

2025-2026 NHL REGULAR SEASON

Decoding sponsorship value across the NHL media mix

How brands can plan a smarter 2026-2027 NHL season
by understanding what drives sponsorship value: which
asset you buy, when in the season you buy it, and how
much competition you'll face in your category

The NHL delivers massive exposure opportunity, across placements built for every budget. Winning share of voice takes a real media strategy

The 2025-2026 season generated \$3.22B in sponsor media value across broadcast and social, up 12% year over year. The NHL runs placements at every price point, so a regional brand and a national one can both find their fit. But a real presence still needs the right strategy behind it. Share of voice comes down to which placement a brand buys, when in the season they buy it, and how crowded their category already is. This report breaks down how each of those factors plays out.

\$3.22B

Total Sponsor Media Value across
Broadcast & Social · +12% YoY



Regular Season

\$1.77B

Sponsor Media Value
+11% YoY

16.6M

Total Exposures

2.5B

Social Media
Engagements

373

Brands with Greater
than \$1M SMV

Postseason

\$1.45B

Sponsor Media Value
+15% YoY

2.4M

Total Exposures

1.1B

Social Media
Engagements

178

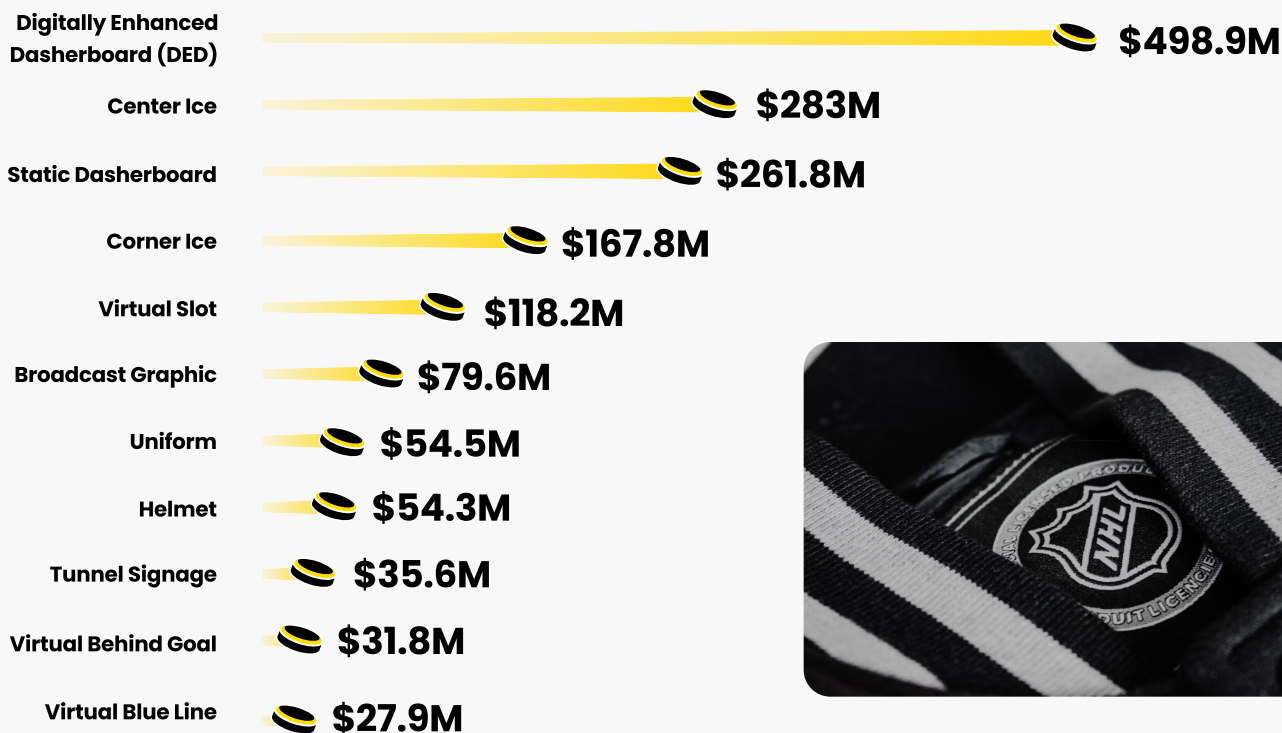
Brands with greater
than \$1M SMV

The first strategy lever: which placement you pick

Broadcast placements don't earn the same share of voice. The NHL runs 49 distinct placement types, and the value gap between them is real, the top asset is worth six times more per exposure than the entry point. Picking the right one for your budget and goal is where a real strategy starts.

Regular Season Broadcast Placements

By Sponsor Media Value



Source: Relo Census, Broadcast Data, 2025-2026 NHL Regular Season



49 distinct placement types across broadcast during the 2025-26 NHL Regular Season



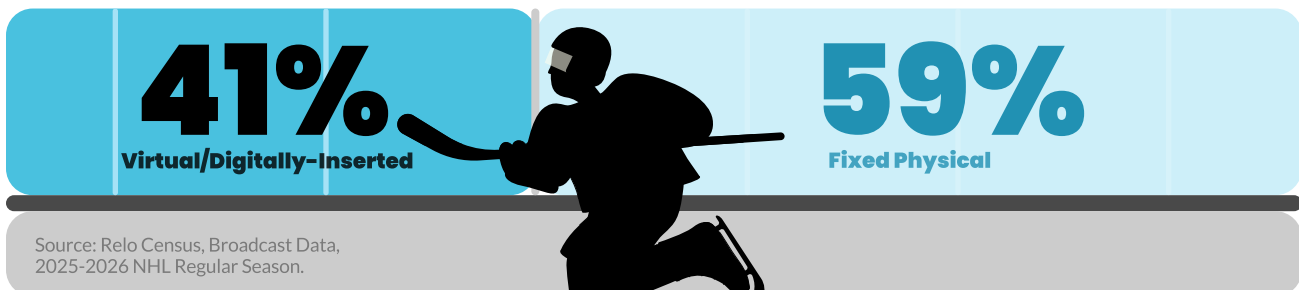
6x range from entry-level to premium inventory — \$37 to \$225 in sponsor value per exposure

Inside that choice: virtual signage has earned its place next to physical

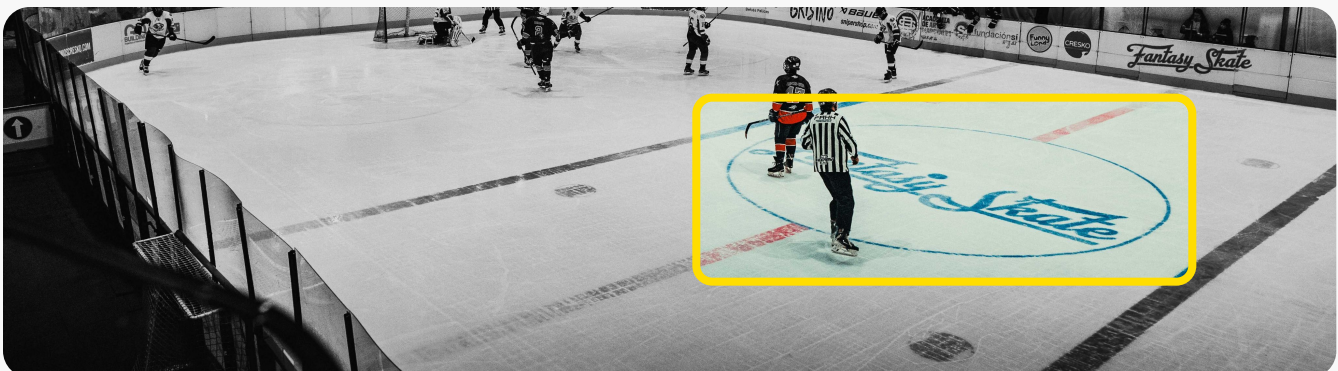
Virtual signage covers dasherboards, ice-level graphics, and on-screen overlays inserted directly into the broadcast feed, rendered live for each game. This kind of signage has grown into 41% of all NHL broadcast value in just a few years, and it comes with a real trade-off: Digitally Enhanced Dasherboards, for example, only appear on the main broadcast camera angle, while static dasherboards show up on every other camera angle throughout the game. DED does something a static board never could, though, it can rotate a tagline or message during the game, closer to a digital ad unit than a fixed sign.

Share of Broadcast Value

Virtual vs. Fixed Physical



Physical signage held its ground the whole time. Dasherboards and Center Ice still carry real value because of that wider camera coverage, even with virtual claiming the premium angle. Both have proven themselves, and picking between them comes down to a brand's goals, not which one happens to be newer.



What virtual and physical signage means for local vs. national brands

Local Brands

Wider camera coverage, or reach beyond home games

A static Center Ice buy shows up across every camera angle the broadcast cuts to, not just the main shot, giving a local brand more chances to be seen live and in replays. Virtual signage trades some of that coverage for reach, it plays when the team is away too, not just the 41 home games, though it comes at a higher price point.

2x

the games reached each season — virtual signage plays across the full 82-game schedule; fixed boards only reach the 41 played at home

National Brands

One national insertion, or a footprint in a key market

DED gives a national brand one buy that appears the same way across every market, without securing space in 32 different arenas. A Center Ice presence in a key market can still matter too, a lasting, physical footprint with broader camera coverage alongside the national reach.

\$285M

in virtual signage value delivered through U.S. and Canadian national broadcasts alone this season



Virtual stretches a local sponsor's reach across the full schedule and lets a national sponsor buy once and appear everywhere, both without a single physical install. Physical still offers something virtual can't: a lasting, ownable presence tied to the building itself.

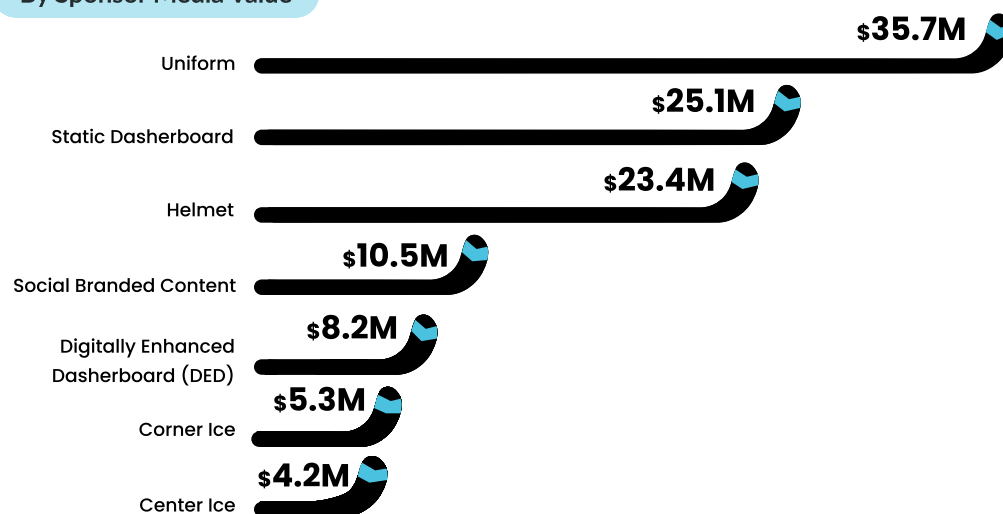
The same placement doesn't win on every channel

Broadcast rewards signage, and DEDs command the top dollar there. Social plays by different rules, both in what wins and who's watching. Uniform, Static Dasherboard, and Helmet lead social value, because a phone screen zooms in on the player, not the board behind them, and the audience scrolling that content skews differently than the one tuning into a broadcast.

Social media algorithms also mean reach isn't only about who lands the biggest placement, a smaller or long-tail asset can still find a meaningful audience if the content resonates. A brand chasing share of voice on social needs a different plan than the one that works on broadcast, buying the placement that wins on TV doesn't guarantee it wins in a fan's feed on social.

Regular Season Social Placements

By Sponsor Media Value



Source: Relo Census, Social Media Data, 2025-2026 NHL Regular Season

Takeaway

If social is where you're trying to build share of voice, buy the player, not the board. Uniform and Helmet earn nearly 3x more per exposure than board inventory sitting in the background, so a smaller Uniform buy can out-perform a bigger Dasherboard buy on this channel alone.

\$153

Value per exposure of the Uniform, Helmet, and Social Branded Content

\$53

Value per exposure of the Static Dasherboard, Digitally Enhanced Dasherboard, Corner Ice, and Center Ice.

Placement gets you in the game. The right content is what earns attention

Sponsor exposure on social isn't spread evenly across the feed. The top 10% of NHL posts carrying a sponsor placement generate 70% of all social Sponsor Media Value this season, and even the top 1% alone accounts for nearly 30%. Landing a placement isn't the same as landing in the post that pays off.

Video is what fills that top decile. A typical video post carries roughly 4x more sponsor exposures than an image, spread across nearly 4x as many distinct brands per post, so a single clip racks up serious aggregate value just by being crowded. Image posts see far fewer exposures per post, but each one is worth substantially more, a tighter, less-crowded shot earns a bigger cut of the value on its own.

Share of Social Sponsor Media Value

By Post Rank

TOP 10% OF POSTS

70%

30%

REMAINING 90%
OF POSTS



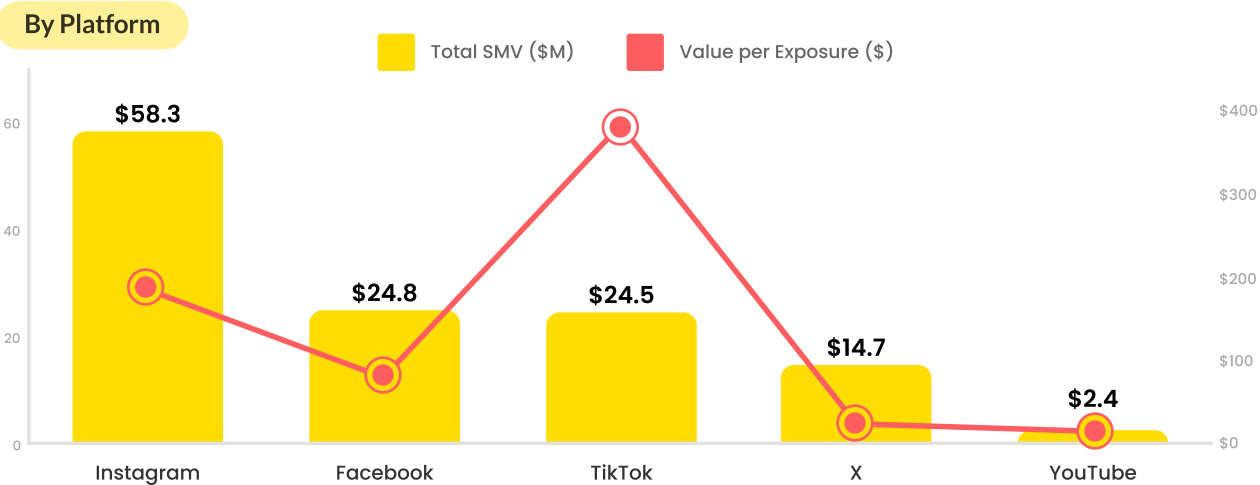
None of this is capped by who follows an account. Algorithmic feeds mean a strong post can reach far beyond a team's own following, which is exactly how a small share of posts ends up carrying most of the value, the algorithm keeps pushing what's already working to new audiences, while everything else stays capped at whoever happened to be scrolling.

Instagram carries the most social value, TikTok pays the most per look

Platform is its own placement decision. Instagram leads in aggregate value, the safer, higher-volume buy. But TikTok's per-exposure rate runs nearly 2x ahead of every other platform, once volume is factored out.

That premium only pays off for the right content. All five of the season's highest-value single posts are TikTok clips, and none are routine game action, they're a blooper, an improbable bounce, a goalie stopping or scoring a goal, and a milestone moment. Picking a platform means picking what kind of placement strategy you're actually running.

Sponsor Media Value & Value Per Exposure



Source: Relo Census, Social Media Data, 2025-2026 NHL Regular Season. Bars = total SMV, broadcast excluded. Line = SMV ÷ exposures.

Top 5 Posts | By Total Sponsor Media Value

Descriptions inferred from post captions and placement context, not independently verified.

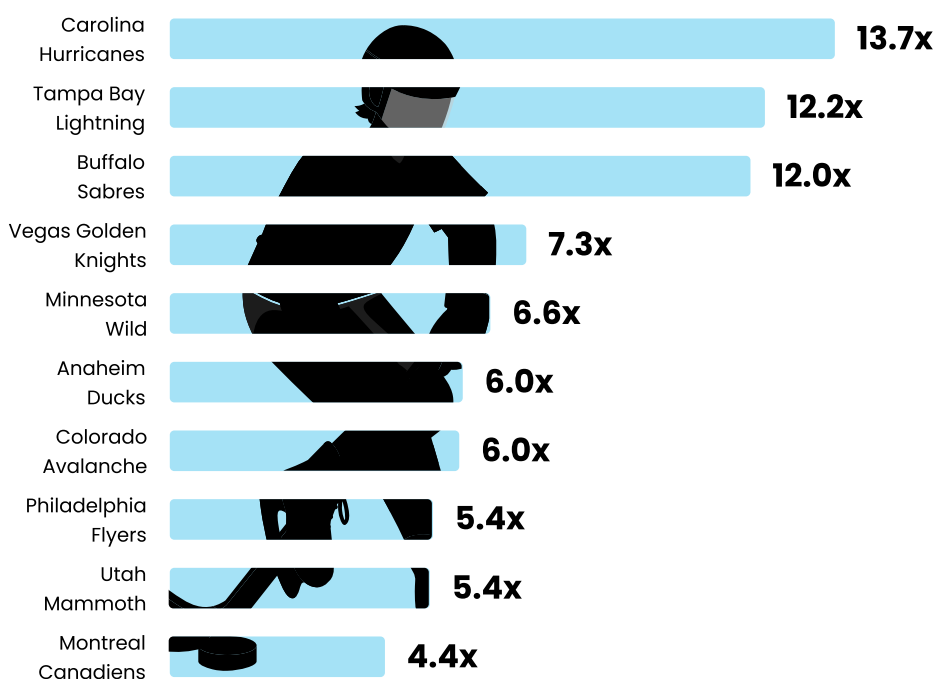
SMV	Date	Platform	Placement(s)	Description	Link
\$846,972	4/9/26	TikTok (@espnnhl)	Broadcast Graphic, Center Ice	Blooper / funny-skate clip	View
\$404,171	2/26/26	TikTok (@nhleurope)	Center Ice, Corner Ice, DED, Static Dasherboard, Virtual Slot	"Not my year" unlucky-bounce clip	View
\$315,225	12/17/25	TikTok (@nhleurope)	Helmet, Static Dasherboard	Goalie poke-check denies a goal	View
\$295,000	12/17/25	TikTok (@nhleurope)	Center Ice, Helmet, Static Dasherboard, Towels, Uniform	Draisaitl's 1,000th career point	View
\$293,061	3/3/26	TikTok (@nhleurope)	Corner Ice, Static Dasherboard	Goalie scores a goal (viral)	View

The second strategy lever: when you commit your sponsorship spend

Committing spend to a team's sponsorship is a bet on timing as much as on the team itself, and often a multi-year one. Nobody can guarantee a playoff run in any single season, but a sponsor locked in across multiple years is positioned to benefit whenever that run happens, not just if they happen to time it right in the moment. Carolina's per-game broadcast value jumped nearly 14x once the playoffs hit, Tampa Bay's jumped almost 13x, real payoffs for sponsors who were already in place, some for years before it happened

Playoff vs. Regular-Season Broadcast Value

Per-Home-Game Premium



Source: Relo Census, Broadcast Data, 2025-2026 NHL Regular Season

7.4x

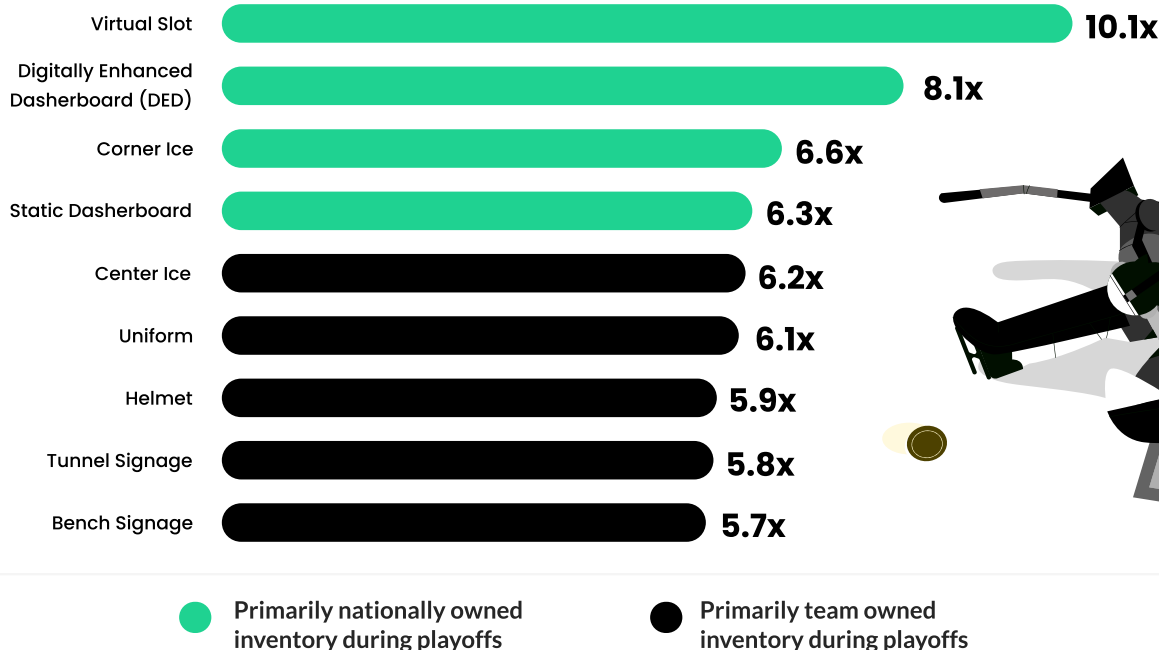
Lenovo, Carolina's Center Ice sponsor, saw its total broadcast value jump 7.4x from the regular season to the playoffs, real return for a sponsor that was already in place before the run happened

Which assets you hold decides how much of the playoff run you capture

Backing the right team is only half the bet. Once a run happens, the asset a sponsor holds decides how much of that multiplier they see. Virtual Slot and DED climb over 8x their regular season value in the playoffs, the steepest gains in the inventory, and national partners are the ones positioned to take them. Physical assets climb too, just less steeply, which makes Center Ice the more attainable, ownable multiplier for team and regional brands.

Playoff Per-Exposure Premium

Versus Regular Season



Source: Relo Census, Broadcast Data.
 Premium = playoff value per exposure indexed to regular-season value per exposure.

The Playoff Sponsor List Flips National

A national brand chasing the biggest possible playoff multiplier should be in virtual inventory before the postseason starts, that's where the ceiling is. A regional brand should treat Center Ice as their multiplier instead, a smaller ceiling, but one they can actually hold onto once national spend moves in on the rest.

Playoff Top Broadcast Brands

FASTENAL **HONDA**

CATERPILLAR **NOBULL**



Own the inventory, or conquest the fans who saw it, either way, there's a play

A collection of brands owns NHL sponsorship inventory across broadcast and social. But that doesn't have to be the end of the story for everyone else in those categories. Brands without a seat at the table can conquest the fans who were exposed to a competitor's in-game presence, reaching them with their own message, off the broadcast entirely. Brands that do have a seat can go further too, retargeting those same warm viewers, fans who already saw their logo during the game with digital campaigns that extend the sponsorship's reach well beyond the game itself.

Replay

For brands with a seat at the table

Identifies the fans who were already exposed to a brand's own logo during a live broadcast, then extends that reach into digital campaigns targeted at those same warm viewers.

CounterPlay

For brands looking to get one

Identifies fans exposed to a competitor's in-game presence and builds a digital audience out of that exposure, one a brand can reach anywhere online, without needing the sponsorship itself.



There's a third factor neither lever accounts for: how crowded a brand category already is

Category competition isn't something a brand can guess at, it has to be measured. Technology carries 195 sponsors in the regular season with value spread evenly. Apparel/Footwear looks similar on paper, plenty of brands active, but by the playoffs, one brand holds 94% of the value.

Financial Services and Healthcare/Pharma stay open even at the highest-stakes moment of the year. A brand walking into any of these categories without knowing which pattern it's facing is planning blind.

NHL Sponsorship Category Concentration

Category	Regular Season			Playoffs		
	Sponsors	Top-1	Top-3	Sponsors	Top-1	Top-3
Apparel/Footwear	68	23.7%	57.4%	48	93.8%	98.2%
Consumer Electronics	43	24.6%	64.3%	33	49.9%	99.9%
Construction	97	14.6%	33.2%	72	52.6%	87.5%
Technology	195	16.0%	29.9%	150	54.0%	77.6%
Retail	175	24.4%	51.2%	132	31.4%	71.0%
Financial Services	182	9.4%	23.2%	138	15.9%	38.4%
Healthcare/Pharma	194	6.9%	18.9%	146	15.3%	38.5%

Sponsor count alone doesn't tell you how open a category is. Consumer Electronics has 43 sponsors in the regular season, on paper a real field, but Energizer and Lenovo alone combine for roughly \$60M in value, while the next-biggest player, Motorola, sits around \$4M. That's two brands and a long, thin tail, not real competition.

A brand deciding where to compete should look past how many sponsors are in a category and ask how the value is actually split among them.

The 2025-2026 season generated \$3.22B in sponsor value, and a clearer answer to what to buy, when, and against whom

How to Plan Smarter for 2026-2027

01

The best value isn't always the most expensive placement

The NHL runs 49 broadcast placement types spanning a 6x price range. A regional brand and a national brand can both own real inventory in the same season, they're just buying different rungs of the same ladder.

02

Playoff value multiplies, and that upside is worth knowing about

Nobody can predict which team makes a deep playoff run. But when one does, its sponsors see broadcast value jump 5-15x almost overnight. A brand evaluating a sponsorship should know that upside exists, even if it can't be guaranteed, rather than judging a deal only on its regular season price.

03

Virtual gets the biggest playoff gains, but physical still climbs

Virtual inventory sees the steepest playoff price jumps, and national partners tend to buy it up fast. Center Ice still climbs in value too, and it's easier for team and regional brands to hold onto, real upside without having to compete with national spend for it.

04

Check how crowded your category is before you commit

Some categories, like Technology, keep value spread pretty evenly across sponsors all season. Others, like Apparel/Footwear, end up dominated by one brand once the playoffs hit, one brand held 94% of the value. Same asset, same timing decision, completely different outcome depending on the category you're in.



About Relo

Relo Metrics is an AI-powered analytics platform transforming how sponsorship value is measured in live sports and entertainment. By combining computer vision, machine learning, and near real-time data, the platform delivers automated, high-precision insights to help brands, teams, and agencies maximize sponsorship ROI and make more informed decisions.



About GumGum

GumGum is the mindset company transforming advertising. We deliver results by matching brands with people in the right mindset, in the moments that matter. Powered by the Mindset Graph™, our AI-driven data engine processes millions of real-time contextual, creative, environmental, and historical signals to match every ad with the most receptive audience. The result is advertising that drives meaningful outcomes for advertisers and publishers, and is more relevant for consumers. Founded in 2008 and headquartered in Santa Monica, GumGum operates in over 19 markets across North America, Europe, Japan, and Australia.

