

# The Price of Sports Sponsorship

April 2023

**Table of Contents** 

#### INTRODUCTION

Scope

Key findings

Methodology

### **OVERVIEW**

Sponsorship valuation across North America and Western Europe

Premier League draws highest average value in three out of four sponsorship categories

NFL dominates North America, New England Patriots topping the regional rank

Five of top 10 teams by sponsorship value in European football compete in Premier League

Apparel and Footwear, and Finance and Insurance dominate sponsorship industry landscape

Equipment partnerships remain a key battleground for adidas and Nike

Strategic takeaways

### THE VALUE OF UNTAPPED SPONSORSHIP CATEGORIES

Measuring the sponsored as well as the unsponsored slice of the deal value pie

Kit sponsorship represents an opportunity to grow sponsorship revenue in North America

Stadium naming rights at the core of untapped deal value in European Football

Over USD10 million of unsponsored deal value on average for NFL and MLB teams

Untapped sponsorship value takeaways

### APPAREL AND FOOTWEAR PREVAILS IN EQUIPMENT PARTNER

Equipment Partner sponsorship key figures

No team in top-flight competition lacks Equipment Partner sponsor

Apparel and Footwear endemic within Equipment Partner sponsors

Nike and adidas concentrate biggest part of Equipment Partner deals

Equipment Partner case study: Paris Saint-Germain's deal with Nike and Air Jordan

Equipment Partner sponsorship landscape key takeaways

## MAIN KIT SPONSOR IS THE MOST PROFITABLE SPONSORSHIP

Main Kit Sponsor sponsorship key figures

Main Kit Sponsor represents one third of total sponsorship deal value

Main Kit Sponsor is the highest-paying sponsorship category on average

Top 10 teams account for nearly half of Main Kit Sponsor value

Main Kit Partner case study: AlA's deal with Tottenham Hotspur

Main Kit Sponsor sponsorship landscape key takeaways

## FAST MOVING AND HIGH POTENTIAL OF OTHER KIT SPONSOR

Other Kit Sponsor sponsorship key figures

Almost half of Other Kit Sponsor deal value is untapped

High deal value concentration across top industries

Many Other Kit Sponsor deals have short-term expiration

Other Kit Partner case study: Visit Rwanda's deal with Arsenal

Other Kit Sponsor sponsorship landscape key takeaways

## STADIUM NAME PARTNER BETWEEN TRADITION AND NOVELTY

Stadium Name Partner sponsorship key figures

Over a third of Stadium Name Partner deal value remains untapped

Finance and Insurance companies behind 50% of Stadium Name Partner deals

Long-term deals are the norm across Stadium Name Partner

Stadium Name Partner case study: Mercedes-Benz's deal with Atlanta Falcons

Stadium Name Partner sponsorship landscape key takeaways

## SPONSORSHIP LANDSCAPE AND FUTURE DEVELOPMENTS

2022 sponsorship landscape and future developments

### **APPENDIX**

Appendix (1)

Appendix (2)

Appendix (3)

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/the-price-of-sports-sponsorship/report.