

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: AIA'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 focussing 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.