

## Marketers take note: A new wave of sport sponsorships opportunities

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WARC

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In this article, SponsorPulse identifies emerging sports that are attracting growing audiences and enthusiasm.

- Sports sponsorship continues to grow, with more than 9,000 brands activating in the NBA alone last season.
- Aligning with a major sports league is expensive, and it's a crowded field.
- Potential alternatives include lacrosse and cricket.

This article is part of the September 2024 Spotlight US series on the changing sports landscape. [Read more](#)

### Why it matters

Sport sponsorships generate a positive return on investment, driving significant changes in consumer attitudes and behaviors. The average brand sponsoring a sport property generates impressive aided recall among the fan base, and converts those to be more favorable toward the brand as well as more likely to purchase.

### Takeaways

- Dozens of sport properties reach millions of Americans every year, many of which are confidently building momentum and excitement with fans. Brands open to exploring these opportunities, understanding the nuances of the sport and its culture, and activating with meaning, stand to be rewarded by fans.
- Major leagues in the US attract the most brand dollars, but thanks to digital and streaming making more sports content available, and the increase in live event attendance, smaller sport leagues can be good opportunities for brands.

America's love of sports has been on full display after a sport-filled summer season. Enthusiasm for sport competitions beyond the major sports leagues is also on the rise and marketers should take note. In the past 12 months, more than 170 million Americans, between the ages of 13 and 64, have engaged with a sport league, team, tournament, or event<sup>[1]</sup>. The average sport fan engages with 19 sport properties per year, highlighting a significant opportunity for delivering reach and frequency of brand messaging with this sought after target<sup>[2]</sup>. These sport enthusiasts, often captured in photos with painted faces or seen on TV chanting rowdily, make up a desirable target for brands given their connectedness to the sports they engage with. Brands looking to drive mass awareness or connect with their target on a deeper level flock to the world of sport where there's no shortage of consumer passion. The Global Sports Sponsorship Market grew from \$105.47 billion in 2023 to \$114.41 billion in 2024. It is expected to continue growing at a CAGR of 8.73%, reaching \$189.54 billion by 2030<sup>[3]</sup>.

While the number of brands getting involved in sport sponsorship continues to accelerate, so too does the difficulty for brands to break through. A recent report by SponsorUnited, covering marketing partnerships within the NBA, captured a total of 9,864 brands that activated in one way or another throughout the season<sup>[4]</sup>. As a result, it shouldn't come as a surprise that while 73% of sponsorship professionals agree that sports far outperform other sponsorship types at delivering reach and awareness, 45% agree that other forms of entertainment were superior in providing whitespace for a brand to breakthrough<sup>[5]</sup>.

While the world of sport sponsorship becomes increasingly competitive across major professional sport leagues and teams, there's another wave of sport sponsorship opportunities that continue to gain traction, worthy of attention and consideration from savvy marketers. These opportunities present brands with the ability to get into sport at more accessible price points, connect with fan bases more efficiently in less cluttered environments, and ride a wave of momentum.

## **Sports capturing the attention of millions of consumers**

This wave of sport sponsorship opportunities includes a combination of old and new, with many recognizable global brands. Importantly, these sponsorship opportunities are capturing the attention of millions of consumers every year and building momentum, showing signs of promise for brands looking for new pathways into the world of sport.

## **Sport has a broader range than ever before**

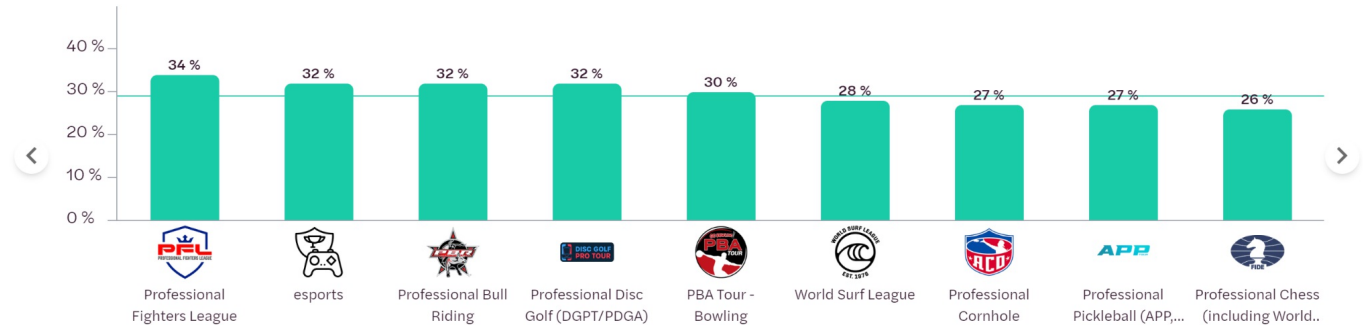
In the world of sport, there's something for everyone, from bull riding to beanbag throwing and everything in between. Dozens of sport properties reach millions of Americans every year, many of which are confidently building momentum and excitement with fans. Brands open to exploring these opportunities, understanding the nuances of the sport and its culture, and activating with meaning, stand to be rewarded by fans. One such example is the partnership between non-alcoholic brewer Partake Brewing and the Association of Pickleball Professionals (APP).

More than 1 in 4 US consumers have engaged with the APP over the past 12 months, as interest and passion for the sport continues to build. A great opportunity for the brand to ride that wave. Almost 1 in 2 (46%) non-alcoholic beer drinkers have engaged with the APP over that same time. These consumers are 1.78x more likely

to have a growing interest in the APP and 1.83x more likely to purchase products from its sponsors versus the general population. Beyond increasing distribution and awareness for Partake, this partnership presents a significant opportunity for these brands to grow together.

## Comparing Properties by Engagement

*% of Americans aged 13-64 who engaged with the property in the past 12 months*



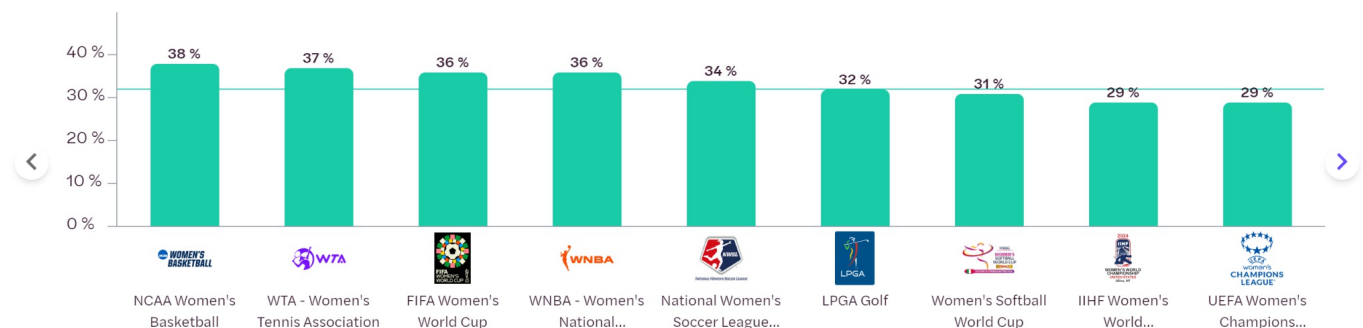
## Women's sports frequency and momentum are on the rise

Women's sport leagues have engaged millions of Americans for years. While most of these properties are experiencing increases in engagement, the increased coverage and exposure is predominantly impacting the frequency with which people are engaging. This increased frequency is also translating to greater momentum and growing interest in these properties, creating a perfect storm for brands to get involved over the long-term.

Over the past 18 months, across more than 50 brand sponsorships of women's sport properties that were measured with consumers, it was observed that the average brand achieved 48% aided recall among the fan base right at parity with the industry standard. Most importantly, among those aware, these sponsorships converted 44% of fans to become more favorable toward the brand and 39% to become more likely to purchase its products <sup>[6]</sup>, both best-in-class results.

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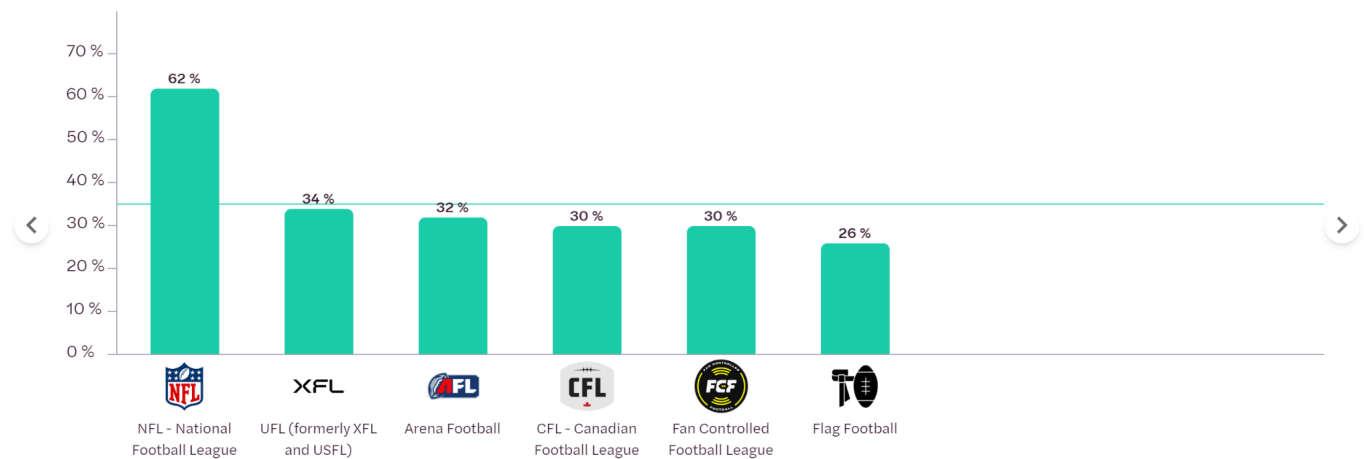


## Alternate football leagues tap into America's deepest passion

America loves football. It's that simple. Across almost every audience segment imaginable, the National Football League claims the top spot as the property with the largest and most passionate fan base. Adjacent football leagues have made attempts to take flight but have struggled to stand the test of time. While that presents a cautionary tale for brands, the recent announcement that Flag Football will be contested in the LA 2028 Olympic Games should provide some of these other football formats with a needed boost. Whether you consider the American Flag Football League, UFL (merger of XFL and USFL), Arena Football League, or keep your eyes on the potential revival of the Fan Controlled League, these alternate football formats have a strong base with significant growth potential.

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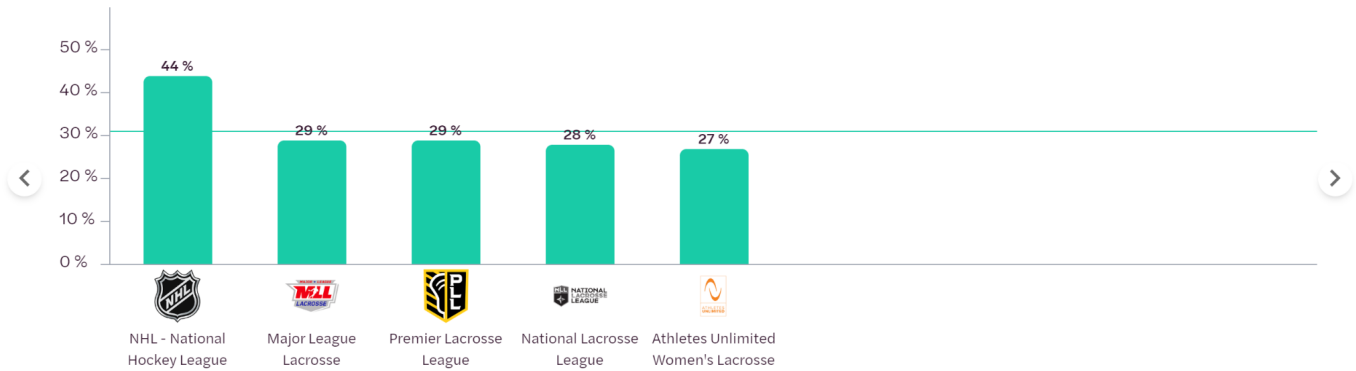


## Box and Field Lacrosse

While the NHL and its feeder leagues capture the hockey market, lacrosse offers a unique opportunity to connect with fans of box (indoor) and field (outdoor) lacrosse. The National Lacrosse League (box lacrosse) and Premier Lacrosse League (field lacrosse from merger of Major League Lacrosse and Premier Lacrosse League), and Athlete's Unlimited Women's Pro Lacrosse engage a significant fan base of Americans. While there's room to build momentum and excitement for the sport, these leagues attract a fan base large enough to warrant consideration.

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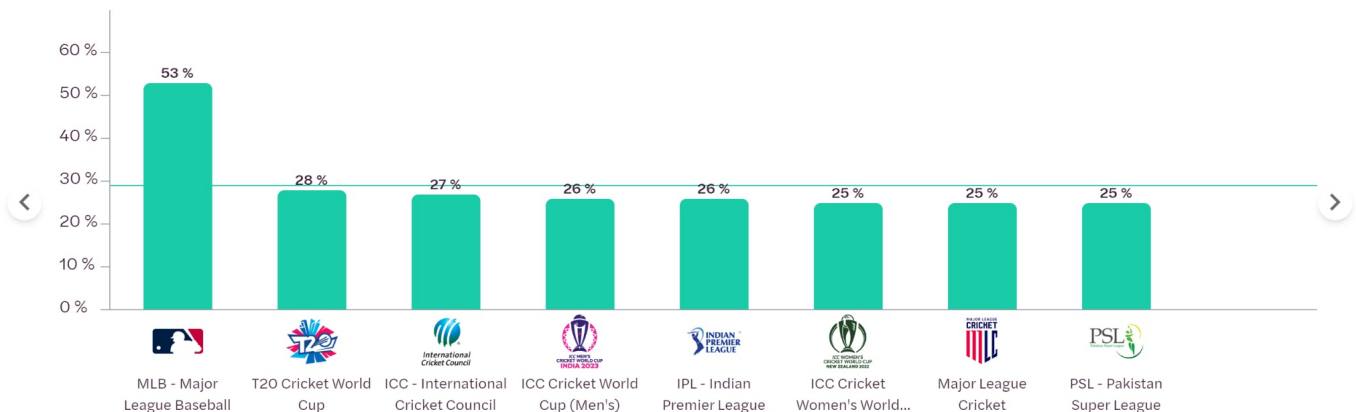
## Cricket lands in North America

US-based Major League Cricket is now in its second edition and has successfully attracted millions of fans and major brand partners like Cognizant, Lexus, and Stake. Beyond this new domestic cricket league, other global cricket leagues like the T20 Cricket World Cup, IPL and PSL still attract millions of fans in the US market. While time zones can make it challenging to capitalize on the live opportunity of sport, consumers are still finding ways to engage across other touch points where brands can intercept and add value to their experience. Relevant side note, LA2028 will mark 128 years since the last time that Cricket was contested at the Olympic Games.

In May 2024, the Toronto Blue Jays hosted Cricket Night at The Park, celebrating Team Canada qualifying for the T20 World Cup of Cricket, with the team in attendance and a memorabilia zone featuring the T20 World Cup trophy. The team and longtime sponsor TD Bank, also a newly minted Cricket Canada partner, offered giveaways and the opportunity to hone your skills with cricket batting cages.

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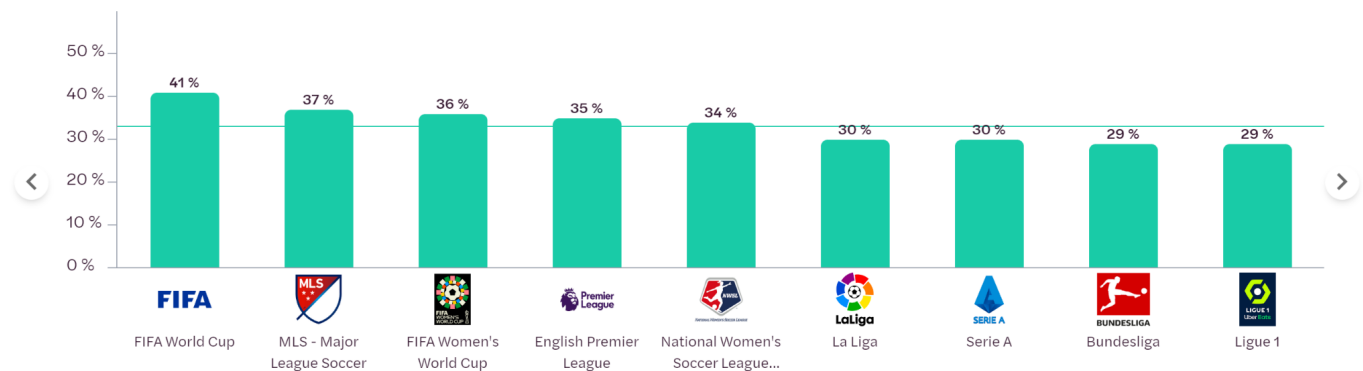
## Global soccer growing on American soil

Major League Soccer has successfully attracted generational global talent to play the beautiful game on

American soil, benefiting long-time league partners. Although FIFA World Cup (Men's and Women's) and MLS lead the way in fan base, European football leagues manage to draw significant audiences with a growing interest for and excitement in those leagues. Exploring US-based partnership opportunities with these international leagues or the teams competing within them, some of whom travel to the US to compete in friendlies, could provide a unique activation opportunity. Two of the largest sport franchises in the world, Real Madrid CF and FC Barcelona, played a preseason installment of the legendary El Clasico at MetLife Stadium drawing a near sold out crowd of more than 82,000 fans.

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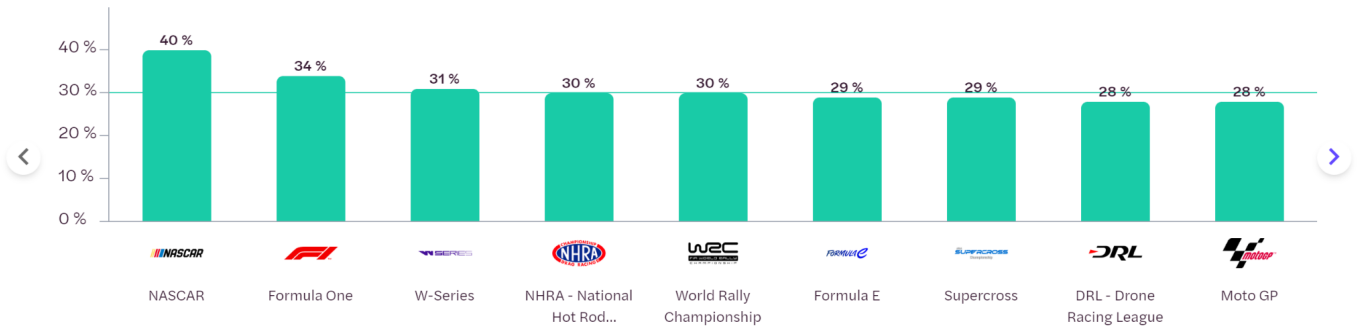


## Motorsport madness

F1s Drive to Survive is likely to continue being considered the best-in-class example of bridging sport and entertainment. Its ability to strike that balance has built momentum and fandom for the racing league globally. Despite its gains, NASCAR continues to lead all motorsport properties with consumers. Interestingly there are several adjacent motorsport properties with significant fan bases in the US. As they bring more events to the US, fans will have the opportunity to get up close with the sport and its drivers, presenting opportunities for property growth. Understanding the plans of those properties to come to the US could provide an interesting business case to invest alongside them.

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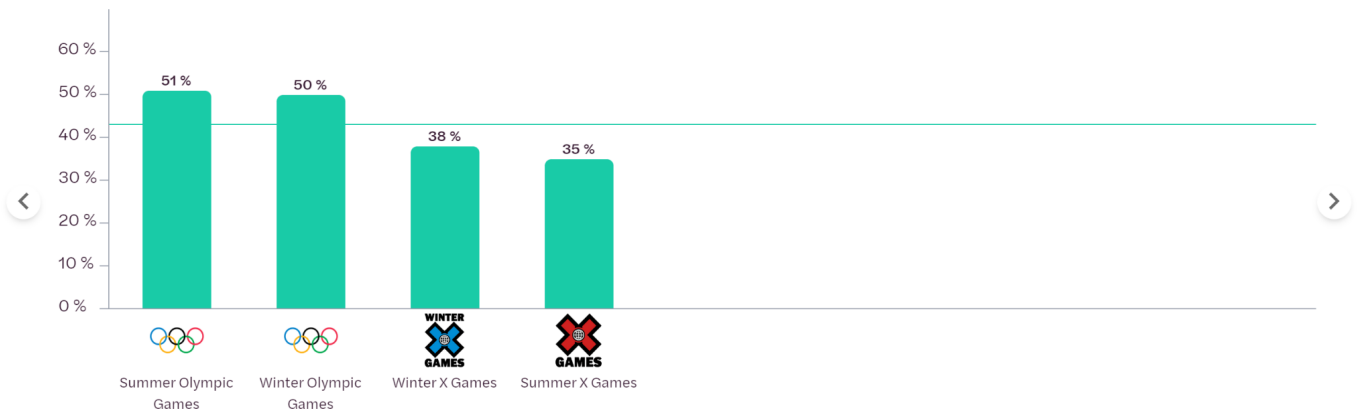


## Extreme sports are still mainstream

Have you ever wondered what happened to X Games? A few years ago ESPN, the founder of the event series, sold it off to MSP Sports Capital who has continued to invest in building the property globally. Its fan base in the US is significant, rivaling major professional sport leagues and that fan base extends across the globe. While there are many endemic extreme sport partners involved, this could be a unique opportunity for a global non-endemic brand to reach a passionate audience.

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## The proof is in the pudding

The data suggests that sport will continue to be a strong investment opportunity for brands to connect with their target audiences. Sport sponsorships have proven to generate a positive return on investment, driving significant changes in consumer attitudes and behaviors. A recent Benchmark Report, focused on the return on outcomes of brand sponsorships, revealed the average brand sponsoring a sport property generates 51% aided recall among the fan base, converting 39% of those aware to be more favorable toward the brand and 35% to be more likely to purchase its products and/or services <sup>[7]</sup>.

What remains to be seen is how brands will find different pathways to breakthrough. These alternative sport sponsorship opportunities, old and new, offer brands a unique opportunity to get into the sport ecosystem and deliver tangible business outcomes. Here are a few tips to get started today.

1. Identify the sport opportunities that strategically align to your target. By identifying where your target is over indexed, you'll be able to drive greater efficiency for every dollar spent.
2. Dig deep to understand the culture of the specific sport property. Sponsorships that add value to fans, and celebrate the culture will maximize a brand's potential for success.
3. Steal with pride from best-in-class activations around the globe. Learn from what's worked and what hasn't to breakthrough and impact fans.
4. Negotiate agreements with a 3+ year time horizon to ensure your brand has time to build credibility with the audience. A great sponsorship evolves over time.
5. Establish shared key performance indicators and tie those KPIs to deal terms to ensure that both property and brand are mutually incentivized to deliver.

## Footnotes

[1] SponsorPulse Insights Platform, 2024. Americans aged 13-64 who engage with at least one sport property per year.

[2] SponsorPulse Insights Platform, 2024. Average # of sport properties an American aged 13-64 engages with per year.

[3] Global Sports Sponsorship Market by Type,, Sponsored Services, Sponsor Categories, Sport Type, End-use, Sponsorship Providers - Forecast 2024-2030. Research and Markets.

[4] SponsorUnited NBA Marketing Partnership 2023-24 Report, May 2024.

[5] SponsorPulse, State of Sponsorship 2022.

[6] SponsorPulse Benchmark Report 2023-24.

[7] SponsorPulse Benchmark Report, 2024.

## About the author

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SponsorPulse

Adam Mitchell is CEO of SponsorPulse.

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