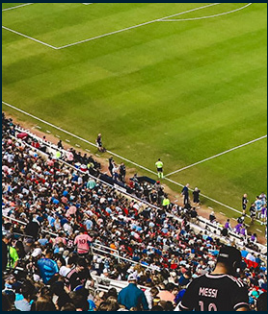
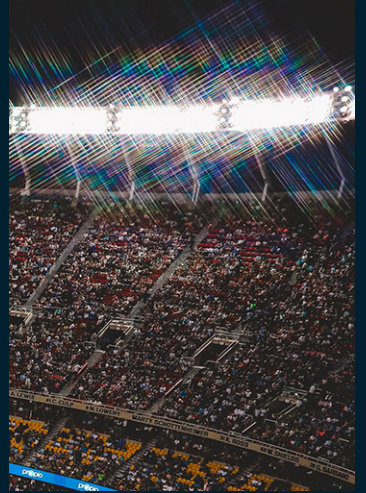
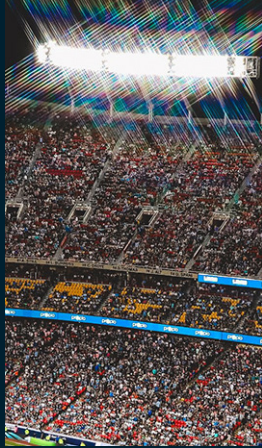
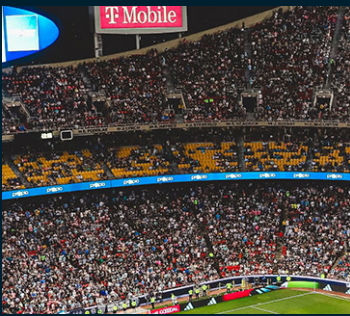


LUMENCY



INDUSTRY SPOTLIGHT ON FOOTBALL

UNLOCKING OPPORTUNITIES IN THE BEAUTIFUL GAME

Feb 2025



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INTRODUCTION

The global football landscape continues to thrive, with top domestic leagues, international tournaments, and club competitions generating billions in revenue and engaging massive global fan bases. This report explores the key elements driving football's success, including league structures, sponsorship models, and the rapid rise of new markets and digital platforms.

Football's most lucrative domestic leagues include the English Premier League, which leads with \$7.5 billion in revenue and over 182 million social media followers, followed by Spain's La Liga, Germany's Bundesliga, Italy's Serie A, and France's Ligue 1. These leagues boast some of the world's most valuable clubs, such as Real Madrid, Manchester United, and FC Barcelona. Club-based tournaments like the UEFA Champions League, which generates \$3.5 billion annually, further fuel Football's global prominence, with high viewership and robust fan engagement across multiple platforms.

International tournaments like the FIFA World Cup remain the pinnacle of football, generating \$6.31 billion in revenue with over 100 million global followers. Other major competitions, such as the UEFA European Championship and Copa America, also contribute to the sport's reach and influence, attracting sponsors eager to capitalize on the broad audience these events command.

Sponsorship plays a critical role in football's ecosystem, offering brands high visibility and emotional connections with fans. Football's international nature allows sponsors to engage diverse global audiences through jersey placements, stadium advertising, and digital platforms. However, the increasing commercialization of football, driven by foreign investments from regions like the Middle East and the United States, has sparked debate about maintaining the sport's traditions while embracing financial growth. These investments have elevated clubs and leagues, making them more competitive, but also raising questions about governance and regulatory oversight.

Emerging football markets, particularly in the United States, Canada, and the Middle East, are gaining prominence. Major League Soccer (MLS) has transformed into a competitive league with growing viewership and high-profile signings, while the Saudi Pro League has attracted global attention with its investments in star players. The growth of women's football is another important trend, highlighted by record-breaking viewership and sponsorship at the 2023 FIFA Women's World Cup, signaling a bright future for the sport's commercial viability.

Digital platforms and football subcultures, including eSports and fantasy leagues, are reshaping how fans interact with the sport.

Streaming services and social media have created new engagement opportunities, allowing fans to access content on demand and participate in global conversations about their favourite teams and players. This shift toward digital fan engagement has also created new avenues for sponsorship, with brands now able to reach targeted audiences through personalized campaigns and digital activations.

The future of Football sponsorship lies in adapting to this evolving landscape. Brands must balance the desire for visibility with strategic focus on cultural sensitivity, emotional engagement, and alignment with fan values. Football's global reach and passionate fan base offer unparalleled opportunities for sponsors to build lasting connections, but these investments must be carefully managed to maximize impact in an increasingly competitive market.



GLOBAL FOOTBALL LANDSCAPE

TOP DOMESTIC LEAGUES AND CLUB-BASED TOURNAMENTS



BUNDESLIGA



COUNTRY:
England

OF TEAMS:
20

LEAGUE REVENUE -
2022/23 (USD):
\$7.5 Billion

AGGREGATE SOCIAL
MEDIA FOLLOWING:
182 Million

The EPL is the highest level of the English football league system and is widely regarded as the most popular and competitive football league in the world. Known for its fast-paced style of play and passionate global fan base, clubs like Manchester United FC, Liverpool FC, and Manchester City FC consistently dominate both domestically and in European competitions.

COUNTRY:
Germany

OF TEAMS:
18

LEAGUE REVENUE -
2022/23 (USD):
\$4.1 Billion

AGGREGATE SOCIAL
MEDIA FOLLOWING:
37.3 Million

Germany's Bundesliga is famous for its vibrant atmosphere in stadiums and focus on developing young talent. The Bundesliga enjoys the highest average attendances in world football, low ticket prices, and a great fan culture. The league's unique 50+1 club ownership rule protects fan interests by requiring members of a club to hold 50 percent, plus one more vote, of voting rights – i.e. a majority. In short, it means that clubs – and, by extension, the fans – have the ultimate say in how they are run, as opposed to an outside influence or investor.

COUNTRY:
Spain

OF TEAMS:
20

LEAGUE REVENUE -
2022/23 (USD):
\$3.8 Billion

AGGREGATE SOCIAL
MEDIA FOLLOWING:
189.5 Million

Spain's La Liga is the top men's professional football division of the Spanish football league system. It is renowned for its technical quality and tactical sophistication. La Liga is home to Real Madrid CF and FC Barcelona's iconic El Clasico fixture and enjoyed peak global popularity in the 2010's primarily due to the sub-plot of Lionel Messi and Cristiano Ronaldo's rivalry – arguably two of the greatest players in the history of the sport.

TOP DOMESTIC LEAGUES AND CLUB-BASED TOURNAMENTS



COUNTRY:
Italy

OF TEAMS:
20

**LEAGUE REVENUE -
2022/23 (USD):**
\$3.1 Billion

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
31.5 Million

Italy's Serie A boasts a rich history and is known for its defensive solidity and tactical mastery. Traditionally featuring clubs like Juventus FC, AC Milan, and FC Inter Milan, Serie A matches are characterized by strategic battles and strong defensive play.



COUNTRY:
France

OF TEAMS:
18

**LEAGUE REVENUE -
2022/23 (USD):**
\$2.6 Billion

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
38.9 Million

France's Ligue 1 has gained prominence in recent years with the rise of Paris Saint-Germain FC (PSG), backed by significant investment. PSG's acquisition of top international talent has raised the league's profile, although historically, clubs like Marseille FC and Lyon FC have also been competitive.

KEY DIFFERENCES BETWEEN FOOTBALL LEAGUES AND NORTH AMERICAN SPORTS LEAGUES

European Football Leagues

North American Leagues

Structure and Promotion/Relegation System

Operate on a promotion and relegation system, where teams can move between divisions based on their performance each season. Lower-tier teams have the opportunity to rise to higher divisions, while poorly performing teams in higher divisions may drop down. This system fosters competitiveness throughout the league structure.

Leagues like the NBA (basketball), MLB (baseball), and NFL (American football) have a closed league structure. Teams do not move between leagues based on performance but rather operate within fixed divisions and conferences. There is no promotion or relegation, which means the league membership remains stable over time.

Ownership and Financial Model

In European football, clubs are often owned privately or by members (as in the cases of many German clubs). There are varying levels of financial resources among clubs, leading to disparities in spending power and player acquisitions. UEFA's Financial Fair Play regulations attempt to mitigate these disparities.

North American leagues typically operate under a franchise model, where teams are owned by investors who purchase a franchise to participate in the league. The leagues often have salary caps and revenue-sharing mechanisms to promote parity among teams, and ensure financial stability across the league.

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North American leagues typically operate under a franchise model, where teams are owned by investors who purchase a franchise to participate in the league. The leagues often have salary caps and revenue-sharing mechanisms to promote parity among teams and ensure financial stability across the league. Additionally, when it comes to new talent, North American leagues have the first pick system where teams that do poorly in the previous season usually get to choose first in the postseason draft, sometimes with a "lottery" factor to discourage teams from deliberately losing.

Cultural and Sporting Influence

Football is deeply ingrained in European culture and is often considered more than just a sport, but a cultural phenomenon. The fan culture is passionate and long-standing, with generations of supporters for each club. Matches are a significant part of local and national identity.

While sports like American football, basketball, baseball, and hockey are highly popular in North America, they compete with a broader spectrum of professional sports and entertainment options. The fan culture and the significance of sports teams can vary widely depending on the region and the sport.

MEN'S CLUB TOURNAMENTS



REGION:
Europe

OF TEAMS:
36

**TOURNAMENT
REVENUE - 2022/23
(USD):**
\$3.5 Billion

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
307.9 Million

The UEFA Champions League is Europe's premier club football tournament organized by UEFA. It features top clubs from European leagues competing in a prestigious annual competition. Teams qualify based on their performance in their domestic leagues, and the tournament culminates in a final match where the winner is crowned European club champion. The Champions League is renowned for its high-level competition, global viewership, and significant impact on the world of football.



REGION:
South America

OF TEAMS:
28

**TOURNAMENT
REVENUE - 2022/23
(USD):**
\$408.8 Million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
28.1 Million

The Copa Libertadores is South America's premier club football tournament organized by CONMEBOL (South American Football Confederation). It brings together top clubs from South American countries to compete annually for the title of continental champion. Similar to the UEFA Champions League, teams qualify based on their performance in their domestic leagues and compete in a series of knockout rounds and group stages. The tournament concludes with a final match where the winner is crowned Copa Libertadores champion. The Copa Libertadores is celebrated for its intense matches, passionate fan base, and significant influence on South American football.



REGION:
Europe

OF TEAMS:
36

**TOURNAMENT
REVENUE - 2022/23
(USD):**
\$521.1 Million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
57.4 Million

The UEFA Europa League is Europe's second-tier club football tournament organized by UEFA. Teams qualify based on their domestic league performances and compete in group stages followed by knockout rounds. The competition concludes with a final match where the winner is crowned Europa League champion. It provides clubs from across Europe with a chance for international success and a route to qualify for the UEFA Champions League in the following season.

MEN'S CLUB TOURNAMENTS



REGION:
England

OF TEAMS:
124

**TOURNAMENT
REVENUE - 2022/23
(USD):**
\$287 Million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
21 Million

The FA Cup is England's oldest and most prestigious domestic football competition. Organized by The Football Association (FA), it includes teams from various levels of English football, from the top-tier Premier League to lower non-league clubs. The tournament features knockout rounds starting from early qualifying stages all the way to the final match held at Wembley Stadium. Winning the FA Cup not only earns a team silverware but also a spot in the following season's UEFA Europa League. The FA Cup is celebrated for its tradition, inclusivity, and the opportunity it provides for smaller clubs to compete against elite teams.



REGION:
Spain

OF TEAMS:
126

**TOURNAMENT
REVENUE - 2022/23
(USD):**
\$35.7 Million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
314.4 Thousand

The Copa del Rey is Spain's premier domestic football competition, organized by the RFEF (Royal Spanish Football Federation). Teams from all levels of Spanish football compete in knockout rounds, culminating in a final match at a neutral venue. Winning the Copa del Rey grants a team a prestigious trophy and a spot in the following season's UEFA Europa League, if not already qualified through their league position. It is celebrated for its history, inclusivity, and the chance for smaller clubs to challenge top-tier teams.

TOP NATIONAL TEAMS



NATION:
France

**WORLD CUPS AND
CONTINENTAL
TROPHIES:**

2 FIFA World Cups
2 UEFA European
Championships

**COUNTRY
POPULATION:**
68 million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
40.6 million

**KIT SUPPLIER
DEAL VALUE:**
Nike \$60 Million USD

**PERCENTAGE OF
POPULATION WHO
ARE FOOTBALL FANS:**
24%



NATION:
Brazil

**WORLD CUPS AND
CONTINENTAL
TROPHIES:**

5 FIFA World Cups
8 Copa America
1 CONMEBOL - UEFA
Cup of Nations

**COUNTRY
POPULATION:**
216 million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
35.8 million

**KIT SUPPLIER
DEAL VALUE:**
Nike \$35 Million USD

**PERCENTAGE OF
POPULATION WHO
ARE FOOTBALL FANS:**
22%



NATION:
England

**WORLD CUPS AND
CONTINENTAL
TROPHIES:**

1 FIFA World Cups
1 UEFA European
Championship

**COUNTRY
POPULATION:**
67 million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
34.3 million

**KIT SUPPLIER
DEAL VALUE:**
Nike \$47 Million USD

**PERCENTAGE OF
POPULATION WHO
ARE FOOTBALL FANS:**
28%

TOP NATIONAL TEAMS



NATION:
Germany

**WORLD CUPS AND
CONTINENTAL
TROPHIES:**
4 FIFA World Cups
**4 UEFA European
Championship**

**COUNTRY
POPULATION:**
84 million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
27.8 million

**KIT SUPPLIER
DEAL VALUE:**
Adidas \$85 Million USD

**PERCENTAGE OF
POPULATION WHO
ARE FOOTBALL FANS:**
32%



NATION:
Argentina

**WORLD CUPS AND
CONTINENTAL
TROPHIES:**
3 FIFA World Cups
15 Copa America

**COUNTRY
POPULATION:**
46 million

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
21.9 million

**KIT SUPPLIER
DEAL VALUE:**
Adidas \$40 Million USD

**PERCENTAGE OF
POPULATION WHO
ARE FOOTBALL FANS:**
27%

TOP PLAYERS



CRISTIANO RONALDO

CAREER TROPHIES:
5 Ballon d'Or

1 FIFA World Player of
the Year

5 UEFA Champions
League

2 La Liga

1 Serie A

3 Premier League

2 Copa del Rey

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
990 Million Followers



LIONEL MESSI

CAREER TROPHIES:
7 Ballon d'Or

1 FIFA World Player of
the Year

4 UEFA Champions
League

10 La Liga

7 Copa del Rey

4 Ligue 1

1 Coupe de France

5 Trophée des
Champions

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
626 Million Followers



NEYMAR JR

CAREER TROPHIES:
1 UEFA Champions
League

4 Ligue 1

3 Coupe de France

3 Trophée des
Champions

2 La Liga

1 Copa del Rey

**AGGREGATE SOCIAL
MEDIA FOLLOWING:**
419 Million Followers

TOP PLAYERS



KYLIAN MBAPPÉ

CAREER TROPHIES:

1 UEFA Champions League

5 Ligue 1

3 Coupe de France

4 Trophée des Champions

AGGREGATE SOCIAL MEDIA FOLLOWING:

155.6 Million Followers



MARCELO

CAREER TROPHIES:

5 UEFA Champions League

5 La Liga

2 Copa del Rey

4 FIFA Club World Cup

AGGREGATE SOCIAL MEDIA FOLLOWING:

124 Million Followers



MOMENTUM

FOREIGN INVESTMENTS AND OWNERSHIP

European football has long been a global business, attracting investors from the U.S., China, and the Middle East. Recently, extremely wealthy owners have tilted the competitive balance in favor of a select few elite clubs that can spend hundreds of millions of dollars to secure the world's best players. The influx of foreign investment, particularly from oil-rich Gulf nations, has prompted concerns and discussions within the EU about stronger governance and regulations.

These significant investments have transformed football into a hyper-industrialized and commercialized sport. While this trend began in the early 2000s with American and Russian billionaires, it was the injection of capital from the UAE, Qatar, and Saudi Arabia that accelerated it. During the coronavirus pandemic, cash-strapped clubs became prime targets for these investors, who seized the opportunity to thrive in a niche that was previously underexplored. According to a report by financial data company PitchBook, more than one-third of the teams in Europe's top five leagues now receive financial backing from private equity, venture capital, or private debt firms. These firms have invested approximately 5 billion euros in Spanish, French, Italian, German, and English teams, up from less than 66 million euros in 2018.

Miami-based 777 Partners, for example, entered the club ownership business a few years ago and now has stakes in clubs across Italy, Brazil, Belgium, France, Australia, Germany, and Spain. The multi-club ownership approach often involves investing in small and medium-sized clubs with lower valuations but greater growth potential. Over 40% of clubs in Europe's top five leagues are now linked to multi-club owners.

Other investors, like California-based private equity firm Silver Lake, hold stakes in Abu Dhabi-controlled City Football Group, whose flagship team

is Manchester City. This group has partnerships with clubs in the U.S., Japan, Spain, and Brazil. Similarly, Sixth Street Partners has deals with Real Madrid and FC Barcelona, while Clearlake Capital Group recently acquired Chelsea FC. RedBird Capital Partners owns controlling interests in AC Milan and Toulouse FC and has a stake in Fenway Sports Group, which owns Liverpool FC.

However, **UEFA's rules on multi-club ownership present hurdles to this model, aiming to protect the integrity of competitions** when teams from the same ownership network could be drawn to play each other. Strictly interpreted, UEFA could block one of the teams in such a network from entering the same European competition.

The arrival of these new investors has prompted regulatory changes in some countries to accommodate their investments. For instance, 777 Partners' presence in Brazil became possible only after a 2021 law allowed clubs to become anonymous football corporations. This legal shift also enabled former Brazilian football player, Ronaldo, to acquire a 90% stake in Cruzeiro Esporte Clube and allowed American businessperson John Textor to invest in Botafogo de Futebol e Regatas. Argentina is also working on legislative changes to attract similar investments.

Foreign investment has undoubtedly allowed clubs to attract global superstars, resulting in high quality Football that appeals to fans and sponsors alike. However, this commercialization risks eroding the identities and traditions that have long been the sport's foundation. Cultural clashes are emerging between profit-driven investors and tradition-minded supporters, raising concerns about the long-term impact on the game.

The potential of external investments can also divide fan bases – the recent

minority investment by business mogul Jim Ratcliffe in Manchester United FC initially intensified divisions among fans, with some backing Ratcliffe for his British ownership and commitment to the club's heritage, while others favored Qatari banker Sheikh Jassim's potential for nearly limitless financial backing. This split reflected broader concerns about the club's future direction and the values that resonate with the fan base.

The proposed European Super League, modeled after closed leagues like the NFL, is a clear example of this tension. Despite the eventual withdrawal of English clubs due to unprecedented fan protests, the proposal highlighted how disconnected some foreign owners are from the values of their core supporters.

From a sponsor's perspective, the influx of foreign investment offers both opportunities and challenges. On one hand, the presence of global superstars and high-profile competitions can enhance brand visibility and align sponsors with top-tier clubs. On the other hand, the commercialization of the sport may alienate traditional fan bases, leading to potential backlash against sponsors perceived as complicit in the erosion of football's cultural heritage.

In Germany, for instance, fans have strongly opposed private equity involvement in the Bundesliga, fearing a loss of control and accountability in a league where most clubs are member-controlled. Protests have intensified, often disrupting games as fans express their discontent by throwing objects onto the field. Sponsors must navigate this complex landscape, balancing the allure of global exposure with the need to respect and uphold the traditions and values that resonate with the sport's passionate supporters.

FIXTURE CONGESTION

Fixture congestion occurs when a **team must play a large number of matches within a short period**, and it can significantly impact fans in several ways. One major effect is on match attendance and the overall viewing experience. When multiple matches are scheduled close together, fans may find it difficult to attend all games or watch them on television. Moreover, the quality of play may suffer due to player fatigue and frequent squad rotations, reducing fans' enjoyment of and satisfaction with the matches. For fans who travel to away games, frequent matches can become logistically and financially challenging, making it harder for them to follow their team.

Fan engagement and enjoyment can also be stymied by fixture congestion. When games are too frequent, fans may feel a sense of over-saturation, and therefore the typical levels of excitement and anticipation fail to build. Additionally, with the increased risk of player injuries due to congested schedules, fans might often see their favourite players sidelined. Inconsistent team performances, resulting from frequent squad rotations to manage player fatigue, can also frustrate fans who expect elite-level performances consistently.

Apart from fan experiences, it can also significantly impact sponsors, both positively and negatively. On the positive side, **more matches mean more sponsorship inventory and more opportunities for visibility and brand exposure**. With each game, sponsors can display their logos on various advertising spaces such as jerseys, billboards, and digital screens, as well as through broadcast media. The increased frequency of exposure can enhance brand recognition and recall among fans, both in the stadium and for those watching from home.

However, **with increased visibility opportunities, teams might demand higher sponsorship fees**. The rationale

is straightforward: more matches provide more sponsorship real estate, which teams could argue is more valuable, thereby justifying a higher price. For sponsors, this can mean increased costs, thus **requiring an evaluation of whether the additional exposure justifies the higher fees**. They would need to consider the return on investment (ROI) carefully, balancing the benefits of increased brand visibility against the higher financial outlay.

Another important consideration is the quality of the logo exposure. If fixture congestion leads to player fatigue and lower-quality games, the engagement level of fans might decrease, diminishing the impact of the sponsorship. Sponsors might find that while their brand is being seen more frequently, it may not be associated with the same level of excitement and positive sentiment.

Additionally, sponsors need to be mindful of the clutter that comes with more frequent matches. The key is to ensure that their messaging stands out and remains memorable amid the increased number of advertisements and games.

From a strategic point of view, sponsors might leverage the increased number of matches to create more dynamic and engaging marketing campaigns. They could align their advertising with specific matches, key moments, or particular player performances to maximize impact. Additionally, **sponsors could explore digital and social media activation strategies to complement their traditional efforts, ensuring they engage with fans across multiple touchpoints**.

The impact of fixture congestion on sponsors is a balance between increased visibility opportunities against higher costs and potential risks associated with the quality of exposure. Sponsors must conduct

thorough market analysis, strategic planning, and valuations to ensure their investments yield the desired outcomes in terms of brand visibility, engagement with fans, and ROI.



1987 1989 1991 1993

Arsenal.com ARSENAL SWEDEN HUNGARIAN GOONERS Arsenal BELIEVE IN THE DREAM AUSTRALIA

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

Emirates FLY BETTER

XHAKA

NEW FOOTBALL MARKETS

Football, often referred to as the world's beautiful game, has a massive global following beyond traditional markets like Europe and Latin America. Other continents are making significant strides in the world of football, with **emerging markets like the United States, Canada, Australia, and the Middle East** investing heavily in infrastructure, encouraging widespread participation, and attracting international talent.

Traditionally focused on other sports, the United States and Canada are now embracing football's growth while Australia and Middle Eastern nations are strategically positioning themselves as influential players in the global football landscape. These regions are shaping the future of football on a worldwide scale, presenting both new opportunities and challenges for sponsors.

In the United States, Major League Soccer (MLS) has undergone a remarkable transition, evolving from a league once considered an afterthought to a strong, competitive property with a unique appeal, underlined by Lionel Messi's move to Inter Miami CF in 2023. While Messi may be at the twilight of his career, MLS is becoming an increasingly attractive destination for young international talent, bringing a rich diversity of players from various backgrounds and nationalities.

This influx has not only enhanced the league's competitiveness but has also helped create a passionate and growing fan base in the United States, Canada, and beyond. Fans have embraced the sport with enthusiasm and loyalty, contributing to a distinctive football culture that continues to thrive.

MLS has ambitious plans to become one of the biggest leagues in the world within the next few years. The league's strategy includes attracting marquee

international players, investing in youth development, and expanding its reach to new markets. The presence of Spanish-speaking players and the vast market potential in the United States offer a compelling case for growth. Additionally, North American talents like Christian Pulisic, Alphonso Davies, Tajon Buchanan, Gio Reyna, Tim Weah, Weston McKennie, Jonathan David, Stephen Eustáquio and Antonee Robinson have made successful transitions to European leagues, showcasing the region's talent pool.

Moving East, Saudi Arabia is swiftly building a league featuring top talent. Over the past two to three years, the Saudi Pro League has made headlines with high-profile signings such as Cristiano Ronaldo, Karim Benzema, Neymar, N'Golo Kanté, Rúben Neves, and others. However, the league has an evolving talent strategy – slowly moving away from signing veterans and established big-name players near the end of their careers, toward players that are still in or have yet to hit their career peaks.

This is a marked difference between the strategies of other entities, like the Chinese Super League, which primarily focused on signing big names in their early-mid thirties- i.e., players nearing the end of their careers- and didn't quite set itself up for prolonged success.

The long-term sustainability of the Saudi football market appears to be stable, supported by large scale investments in talent and long-term infrastructure. Saudi Arabia certainly has ambitious plans beyond the league to grow its football market, aiming for significant revenue hosting the 2034 FIFA World Cup as a key part of this vision.

Broadcasting rights play a crucial role in expanding football's reach in these emerging markets. Networks like Qatar's beIN Sports have the potential

to propel Saudi and Middle Eastern football into the global spotlight, as they have done with other major sporting events. Turkey's Süper Lig has also seen a remarkable surge in popularity, driven by the success of Turkish clubs on the European stage, particularly in the UEFA Champions League. Clubs like Galatasaray SK, İstanbul Başakşehir FK, and Beşiktaş JK have consistently competed in Europe's premier club competition, attracting international attention and demonstrating the league's growing competitiveness.

The Turkish Süper Lig's appeal is further enhanced by its ability to attract top talent from other European leagues. Turkish clubs have become increasingly successful in securing high-profile players—both players in their prime and experienced veterans—injecting new energy into the league. This influx of talent has made the league more appealing to local fans and international viewers, solidifying its status as a prominent force in European football.

As these emerging markets continue to grow and evolve, sponsors have a unique opportunity to align with the dynamic and expanding landscape of global football. However, they must navigate the cultural and commercial complexities that come with these new territories, ensuring that their investments resonate with both local and global audiences.



DIGITAL FOOTBALL PLATFORMS & SUBCULTURES

Traditionally, football fans relied on cable TV or attending matches in person for live action. However, **the rise of streaming technology has disrupted this model, offering fans instant, on-demand access to matches.** This shift has caused a decline in traditional viewership while leading to the rapid growth of football streaming platforms. **These platforms have enhanced fan communities, enabling them to connect, discuss, and celebrate their passion from anywhere in the world.**

Social media has revolutionized the interaction between sports teams, players, and fans, offering new opportunities for engagement and personal branding. As digital platforms evolve, the sports industry has experienced a profound transformation in fan engagement, particularly in football. For sport organizations, the challenge now lies in creatively connecting with fans, building and maintaining audiences, and communicating effectively with stakeholders. Social media has become a critical tool for achieving

this, with engagement metrics serving as key performance indicators.

The rise of digital football subcultures, including fantasy sports, further expands opportunities for fan interaction. Fantasy Football, where users build teams from real players whose game performances determine points, has grown significantly. **In 2023, the global fantasy sports market was valued at \$29.85 billion, with projections of over 15% growth annually between 2024 and 2032.**

This rise is driven by expanding digital infrastructure and the increasing popularity of sports. Fantasy Football dominates the European fantasy sports market, providing an immersive way for fans to engage with their favorite sport. **The growing participation of women in fantasy sports also signifies a shift toward inclusivity, presenting an untapped market for sponsors looking to connect with diverse audiences.**

Sports betting, another major trend, has seen rapid growth, especially in Football. The legalization of sports betting in the United States has fueled

its rise, with fans now able to place bets on a variety of outcomes using mobile devices. The 2018 Supreme Court ruling to overturn the Amateur Sports Protection Act opened up new opportunities for regulated betting, and football betting has become increasingly popular. For sponsors, this creates a direct avenue to reach highly engaged audiences through betting platforms.

eSports, particularly football-related titles like FIFA and Pro Evolution Football (PES), have also emerged as major players in the digital football space. In 2021, **the global eSports market generated over \$1.08 billion USD**, and football-themed eSports tournaments have further legitimized the space, attracting both players and fans worldwide. Virtual leagues, such as the ePremier League, now offer competitive environments mirroring real-world football leagues, with large prize pools and fan engagement.



Football eSports have broken down geographical barriers, making football more inclusive and accessible globally, providing sponsors with a way to engage new and diverse audiences.

The Kings League, launched in 2023, represents another example of Football's digital transformation. With €60 million in funding and an international expansion plan, the Kings League blends traditional football with modern entertainment. It has leveraged the brands of current and former stars like Sergio Agüero and Neymar, while incorporating popular streamers to tap into youth markets. Matches are live-streamed on platforms like Twitch and TikTok, bypassing the need for traditional pay TV. The league's innovative distribution model has made it one of the most-watched football leagues on TikTok, creating significant opportunities for sponsors to reach a global, digitally-native audience.

In this rapidly evolving digital football ecosystem, sponsors must adapt their strategies to stay relevant. **Digital platforms, social media, eSports, and innovative leagues like the Kings League offer new ways to engage fans, create brand awareness, and foster community involvement.** As football continues to expand beyond traditional borders, sponsors who embrace these trends will be better positioned to connect with the next generation of football fans.





NON-LIVE CONTENT AND FOLLOWERSHIP

The evolution of content creation has transformed how sports are consumed, shifting from simple game highlights to engaging, personal, and even interactive experiences. This change is driven by innovative content creators who have become key figures in the industry. Today, **content creators hold significant influence, shaping how fans engage with and experience sports**. Through unique storytelling and authentic connections, they bring fans closer to the action and the personalities behind the game. Content drives engagement, and engagement, in turn, drives revenue.

The trend of creating football-focused content on streaming platforms has gained significant momentum in recent years, capitalizing on the football's global appeal and the personal stories of its stars.

This trend reflects a broader strategy by streaming services to engage viewers through high-quality, narrative-driven content that goes beyond traditional sports coverage. By focusing on individual players and clubs, these documentaries not only attract football fans but also resonate with general audiences through themes of perseverance, rivalry,

and personal growth. This approach enhances the emotional connection fans have with the sport, while also providing insights into the personalities that shape it.

The reach and engagement capabilities of content creators provide valuable lessons for football properties striving to remain relevant in a crowded market. Content creators thrive on authenticity, and football properties can emulate this by fostering genuine connections with their fans, beyond just the matches. **The shift toward interactive and engaging content creates a more immersive experience, giving fans a greater sense of involvement.** Building a community around the sport is now just as important as the sport itself. Engaging content that resolves with fans' emotions and experiences can help cultivate a loyal fan base. Embracing new formats and platforms opens up fresh opportunities for engagement and growth.

According to PwC's Sports Industry Outlook 2023, sports sponsorship is undergoing significant changes, and one of the most impactful factors is the rise of new media channels and platforms.

Over the past decade, the expansion of online streaming services and the widespread availability of smartphones have enabled football to reach beyond traditional fan bases.

New media platforms, such as social media, streaming services, and digital content platforms, have significantly extended the reach and visibility of football sponsorships. **Sponsors can now engage a global audience through various digital channels, including live streaming, highlight videos, and social media posts.**

This increased exposure has attracted more sponsors to invest in football. No matter where fans are in the world, they can access and engage with football content across digital platforms, opening up new markets and opportunities for sponsors to connect with a broader fan base.

Professional football has evolved into a global entertainment industry without boundaries, with football being the most-watched sport worldwide. Regions like the Middle East, Africa, and Latin America have the highest viewership, with 72% of their populations regularly watching football through online platforms or broadcast TV.

The sports business model, primarily B2B, has benefited from selling its primary assets to broadcasters, sponsors, and content platforms. Sports documentaries have seen remarkable growth in recent years, offering a compelling alternative to the unpredictable nature of live events. While live sports unfold spontaneously, **documentaries provide deeper insights, revealing untold stories and unseen moments.** Their goal isn't just to entertain but to inform, educate, and offer fresh perspectives in real-life events.

There's no drama quite like sports, unfolding live without a script. Fans who follow live sports are often well-versed in the rules, history, and athletes. However, for those less familiar with the intricacies of a particular sport, the experience can feel distant, making them less likely to tune in. This is where sports documentaries bridge the gap, bringing these stories to life in a more accessible and engaging way.

The growing focus on individual players, rather than teams, is also helping to attract new audiences. While star power doesn't always guarantee success, fans are increasingly drawn to following individual athletes. One of the objectives of sports documentaries is to dramatize the sport and attract audiences who might not typically watch live events.

Through behind-the-scenes access and personal interviews with athletes, coaches and staff, these shows reveal the emotions, struggles, and pressures that are often missed in live broadcasts.

Producing documentaries has become a cost-effective option, and despite the lower production costs, these films often attract audiences similar in size and demographics to live sports events. For example, Amazon Prime Video produced "All or Nothing," a docuseries that follows clubs like Manchester City and Arsenal during their seasons, providing an in-depth look at team dynamics and the challenges they face. Similarly, Netflix has released documentaries like "Neymar: The Perfect Chaos," which explores the Brazilian superstar's life both on and off the pitch.

This success has led to the development of more series' covering various sports and shedding light on previously untold stories. Documentaries help bring new fans into the fold by making sports more accessible and relatable. Fans gain a deeper understanding of the athletes, their challenges, and the intricacies of their sports. **This approach broadens the appeal of sports content, reaching audiences who may not have been drawn to live games but are captivated by the personal journeys and behind-the-scenes drama that documentaries offer.**

These narratives not only fill gaps in the sports calendar but also enhance the effectiveness of marketing campaigns by fostering stronger emotional connections between fans and the sport. When fans connect with the human side of sports, their emotional investment deepens, strengthening their loyalty and keeping them engaged with the sport and its stars year-round. This approach sustains and amplifies fan engagement, making storytelling a crucial tool in creating impactful sports documentaries.

WOMEN'S FOOTBALL

Women's football has seen tremendous growth both on and off the pitch, with increasing participation from women and girls, professionalization, and commercial appeal. The launch of FIFA's first ever Women's Football strategy in 2018, along with the successful FIFA Women's World Cup – France 2019, highlights the high prioritization of the sport.

Following record audiences, FIFA introduced a commercial program for women's football, leading to dedicated partnerships for the World Cup in Australia and New Zealand with brands like Visa, Xero and Unilever.

Comparing growth trajectories, the Women's World Cup attendance, estimated at 1.1 to 1.5 million) will outpace the men's at the 30-year mark from inception (800,000 men's at the 30 year mark). **To sustain this momentum, continuous promotion, investment, and increased access to women's sports are essential, as preferences develop through exposure.**

The 2019 Women's World Cup achieved over 1.1 billion viewers, thanks to increased promotional efforts and affordable streaming

options. Consistent, reliable, and well-produced access to women's sporting events is crucial for future growth, as exposure shapes current and future preferences.

FIFA has reformed and optimized the women's football competition system at both club and national levels. Five of the six confederations (Confederation of North, Central America and Caribbean Association Football – Concacaf, South American Football Confederation – CONMEBOL, Union of European Football Associations – UEFA, Confederation of African Football – CAF, Asian Football Confederation – AFC, Oceania Football Confederation – OFC) now run continental club competitions. For example, CAF launched its Women's Champions league in 2021, and CONCACAF plans to introduce a club competition in 2025.

In Canada, the Northern Super League (NSL) is set to transform women's football, providing a long-awaited professional platform for the country's top talent. Project 8, founded in 2022 by Olympian Diana Matheson and business partner Thomas Gilbert, will be launching the NSL in April 2025.

Led by Diana Matheson, who faced challenges in finding professional opportunities domestically, the NSL aims to keep Canadian talent at home. With six founding clubs across the country—from Vancouver to Halifax—the league seeks to become one of the top five professional women's leagues globally. Each club has a unique identity, rooted in its local culture, and is committed to inspiring future generations of players.

The teams are already signing top Canadian players in anticipation of their launch next year and are currently working on securing sponsors at all levels.

At the national team level, 2022 saw all six confederations stage their pinnacle national-team competitions, with reforms enhancing the regional competition landscape. For instance, Concacaf revamped its national team ecosystem with the introduction of the "W Gold Cup", featuring guest teams from the CONMEBOL region. UEFA also implemented a new national team competition system with the UEFA Women's Nations League, which will serve as the European qualification pathway for major tournaments.

The number of women and girls playing organized football increased by nearly a quarter compared to 2019 (to 16.6 million), with players now more evenly distributed across confederations.

The FIFA Women's World Cup 2023 in Australia and New Zealand was a game-changer, breaking records and highlighting the sport's growing popularity. With an expanded format, record-breaking attendance, and unprecedented global broadcast coverage, the tournament demonstrated the potential of women's football. The increased participation and peak audience in Australia reflects the growing interest and support for women's national teams. Ticket sales rocketed to 1.4 million, setting a new record.

Commercial revenue, particularly sponsorship, is currently the key driver of growth in women's football, contrasting with the men's game, where media rights dominate. For the 2023 World Cup, 30 brands, including Visa, partnered, with deals contributing to an estimated \$307.92 million USD in annual sponsorship revenue, enabling a record prize money pool. However, discrepancies compared to the men's game remain significant.

In 2023, 34% of member associations with a women's top-tier senior domestic competition had a dedicated women's football sponsor. These competitions typically had higher average operating revenue than those without a dedicated sponsor (\$1.814 million USD vs \$199,000USD). Furthermore, **81% of member associations with a dedicated sponsor received funding or value in kind from existing sponsors.**

Games are commonly broadcast on free-to-air channels (64%) and social media platforms (63%). Broadcasting football free-to-air maximizes viewing figures, increases match reach, and makes the product more commercially attractive to sponsors.

The global exposure of women's Football through tournaments like the FIFA Women's World Cup – France 2019 has inspired women and girls worldwide to pursue Football careers. However, for Football to be a viable career path, supporting structures must continue to be prioritized.

Continued development and investment in women's Football will grow the game, generate more interest, and draw revenue into the sport. This will improve the quality of the product and generate more funds for reinvestment.





WHY DOES FOOTBALL SPONSORSHIP MATTER?

POPULARITY AND FOLLOWING

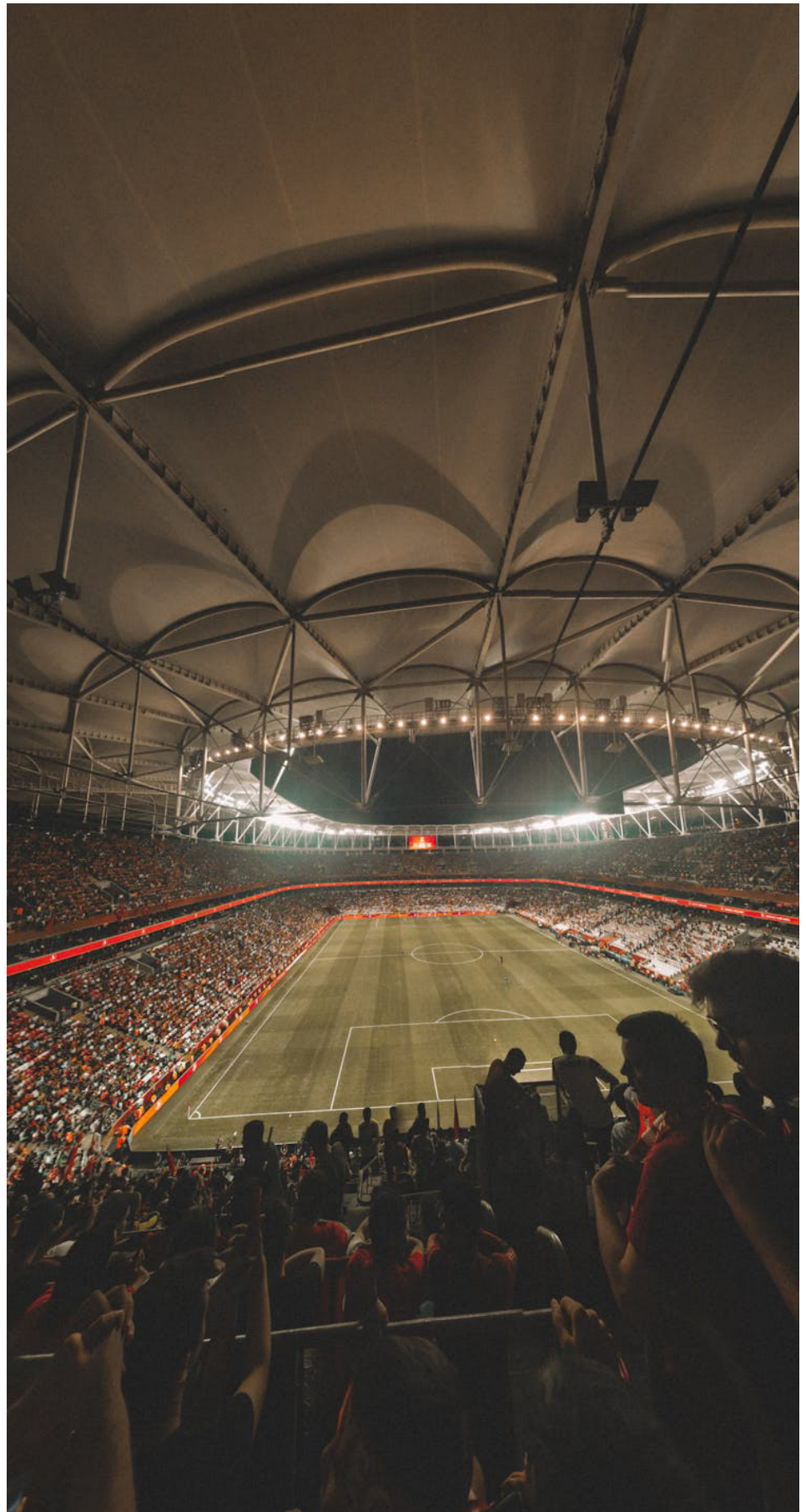
Sponsorship agreements in football allow brands to tap into the immense popularity and emotional connections fans have with teams and players. These partnerships give sponsors visibility through placements on jerseys, stadiums, and advertising platforms, turning them into an integral part of the match day experience. Depending on the sponsorship strategy, brands can prioritize exposure in the stadium, on television, or online, ensuring they connect with fans where engagement is highest.

By associating closely with a club or athlete, sponsors build a long-term emotional bond with their audience. Fans often transfer their loyalty and positive feelings toward their team to the brands that support them, creating a powerful association that grows with the depth of the partnership. Major sponsors, in particular, gain extensive rights to use the sponsorship across campaigns, storytelling, and brand activations, which can span both digital and traditional platforms.

At its core, **sponsorship is about aligning with the passion inherent in sports.** Football fans are not just passive consumers, they are deeply engaged, emotionally invested, and ready to share in the excitement. This passion is something sponsors can harness to increase brand visibility.

Brands that recognize this opportunity can create narratives that go beyond the game itself, using documentaries, social media campaigns, or community initiatives to reinforce their connection to the sport and its fans.

Football, often described as an international language, has the unique ability to transcend borders, languages, and cultures. A successful sponsorship can resonate on a local level during national tournaments while simultaneously creating a global ripple effect, reflecting the universal appeal of the sport.



BRAND EXPOSURE AND VISIBILITY

Visibility in football sponsorship extends beyond the physical presence of logos and names, it involves strategic alignment with the values and emotions Football evokes in its fans. Whether it's the euphoria of a winning goal or the resilience of a well-fought match, football offers sponsors a way to connect emotionally with audiences. The sport's ability to foster connection is unparalleled in other forms of entertainment, making it an ideal platform for brands to reach millions of passionate, engaged consumers.

Football sponsorship can serve as a powerful marketing vehicle, with brands seizing the change to put their names, logos, and values front and centre when fans are most engaged. This emotional and high-visibility connection elevates the brand's identity and strengthens its presence both in physical venues and across media platforms.

INTANGIBLE ASSOCIATIVE BENEFITS

Football sponsorships offer more than just tangible returns on investment, they provide brands with a platform to become part of the very fabric that binds communities, cultures, and nations through a shared love of the game. The impact of football sponsorship goes beyond just metrics and numbers; it's about the stories told, the emotions stirred, and the memories created.

Brands that effectively leverage football sponsorship can leave a lasting legacy in the hearts and minds of fans, one that endures long after the final whistle blows. Through these partnerships, brands have the opportunity to become synonymous with the values and spirit of the sport, creating an enduring association that elevates them far beyond the status of commercial partner, to cultural icon.

SPONSORSHIP MODELS

Team Sponsorship

One of the most common forms of sponsorship in football, it provides brands with extensive visibility and deep fan engagement. In this model, a brand partners with a specific football team, gaining rights to display their logo on team kits, training gear, and equipment, as well as around the stadium. This type of sponsorship can often include exclusive rights for the brand to be the “Official Partner” or “Official Sponsor” of the team, creating a strong association between the brand and the club's identity.

Key Benefits

Constant Exposure: The brand's logo is displayed across multiple touchpoints, including match broadcasts, social media, and press events, providing both physical and digital exposure.

Fan Loyalty: Team sponsorship allows brands to tap into the deep loyalty fans have for their club. Fans often associate a brand's support with the success and values of their favourite team, leading to increased brand affinity.

Activation Opportunities: Sponsors can create campaigns around team milestones, allowing for unique marketing opportunities that capitalize on high moments of engagement.



SPONSORSHIP MODELS

Event Sponsorship

Involves sponsoring a football tournament, league, or a specific match, which offers brands exposure during a highly visible and concentrated period. Whether it's the FIFA World Cup, the UEFA Champions League, or a national league like the Premier League or La Liga, event sponsorship connects brands with some of the most-watched sporting events globally.

Key Benefits

Global Reach: Major football events attract millions of viewers from across the globe, offering sponsors a chance to connect with international audiences.

High Engagement: The excitement and media coverage surrounding Football events create high engagement moments where brands can be seen as integral to the event's success.

Activation Platforms: Event sponsorships often include the ability to launch fan activations such as on-site experiences, giveaways, and exclusive event-related content, driving both brand awareness and consumer interaction.



PHOTO BY AMIR MORTEZAEI ON UNSPLASH

SPONSORSHIP MODELS

Athlete Sponsorship

Focuses on partnering with individual football players. This model is particularly appealing for brands looking to align themselves with the personal values, charisma, and talent of specific athletes. Sponsors often collaborate with athletes to promote products, services, or causes through endorsements, social media campaigns, and advertisements.

Key Benefits

Personal Connection: Fans have a deep emotional connection with athletes, often seeing them as role models. By aligning with a high-profile player, brands can build credibility and trust with the athlete's fan base.

Targeted Influences: Sponsoring an athlete allows brands to reach niche audiences. For instance, a health or fitness brand might partner with a player known for their discipline, while a lifestyle brand might choose someone known for their fashion sense.

Versatility in Activation: Athlete sponsorships can be leveraged in multiple ways, from branded product lines to exclusive social media content that highlights the athlete's personality and style, further boosting engagement.



SPONSORSHIP MODELS

Venue Sponsorship

Often referred to as stadium naming rights, it allows a brand to attach its name to a football stadium or training facility. This type of sponsorship offers long-term visibility, as stadiums are a permanent fixture in the football world. Beyond the naming rights, brands can also be involved in venue-specific activations, such as branded lounges, VIP areas, or fan zones.

Key Benefits

Long-term Presence: Unlike other sponsorship types, venue sponsorship ensures the brand's name is continuously present throughout the football season and beyond, building strong associations over time.

Enhanced Fan Experience: By creating branded areas or interactive experiences within the stadium, sponsors can directly engage with fans on match days, enhancing brand interaction.

Visibility in Media: With stadium names frequently mentioned in broadcast, news articles, and social media posts, venue sponsors gain organic exposure whenever the team plays, both home and away.



SPONSORSHIP MODELS

Product Sponsorship

Involves providing a football team, event, or athlete with goods or services in exchange for brand exposure. This can range from sportswear companies supplying uniforms, to beverage companies providing drinks during matches. Product sponsors often become the “Official Supplier” of a particular item, gaining exclusive rights to supply and market their association. League or event sponsorship connects brands with some of the most-watched sporting events globally.

Key Benefits

Product Integration: Product sponsorship allows brands to integrate their offerings directly into the football experience, ensuring fans repeatedly interact with the product throughout matches, training sessions, and events.

Association with Performance: For sportswear and equipment brands, product sponsorship allows them to be associated with the performance and success of the team or athlete. If a team wins while wearing a brand’s gear, the brand becomes synonymous with that success.

Experiential Marketing: Product sponsors can leverage fan experiences by offering exclusive branded merchandise, giveaways, or product demonstrations that enhance the fans’ connections to both the team and the sponsor.





BRAND IMPACT

Sponsorship in football has the potential to significantly transform a brand's image, credibility, and influence, both locally and globally. By aligning with football, brands are able to leverage the sport's universal appeal and emotionally charged environment to achieve a lasting impact. This connection helps in building stronger relationships with consumers, boosting brand recall, and enhancing overall market positioning.

One of the immediate effects of football sponsorship is heightened brand visibility. **Football attracts millions of passionate viewers worldwide, providing an ideal platform for brands to be seen by a diverse and engaged audience.** Whether through jersey placements, pitch-side advertising, or digital campaigns, brands are embedded into the fan experience. This consistent visibility translates into higher brand awareness as the logo and messaging are seen repeatedly throughout matches, on TV, in the stadium, and across social media.

By associating with high-profile football teams, tournaments, or players, brands also get to benefit from the media coverage these properties naturally generate. This ensures constant media mentions, extending the brand's reach far beyond traditional advertising channels.

Sponsoring a respected football team or event lends credibility to a brand, especially when consumers see the brand as part of a successful and admired sporting community. Fans often view sponsors as contributors to their favourite team's success, fostering a sense of goodwill toward the brand. **This association enhances trust and loyalty, as fans believe the brand shares their passion for the sport and their values, such as teamwork, dedication, and resilience.**

Furthermore, aligning with athletes or teams who embody positive traits, such as perseverance, leadership, and sportsmanship, can improve a brand's image by association. The authenticity and human element athletes bring can translate to greater credibility for the sponsor.

Football's emotional intensity is a unique opportunity for brands to connect with fans on a deeper level. **Sponsorships allow brands to engage with audiences at moments of high excitement and joy, when fans are most receptive.** By becoming part of the story that surrounds a team's victories or an athlete's personal achievements, brands are able to share in these emotional moments, leaving a lasting impression on fans.

This emotional resonance often drives higher levels of engagement. **Brands that craft narratives around the sport, through social media, branded content, or fan activations, are able to engage with their audience on a more personal and emotional level, creating lasting memories that reinforce brand loyalty.**

Sponsorships allow brands to associate themselves with the values that football represents: passion, teamwork, competition, and perseverance. By linking their brand with these values, sponsors can elevate their own brand perception, becoming more than just a product or service. They can position themselves as a key player in the football ecosystem, fostering a sense of purpose beyond their commercial offering.

Fans, in turn, develop brand affinity: strong emotional ties that lead to higher consumer preference and loyalty. When brands are seen supporting a beloved team or an admired athlete, fans are more likely to choose those brands over competitors. This emotional loyalty can be crucial in crowded marketplaces, where differentiation is key to long-term success.

Football's reach is global, and sponsorship within the sport opens up international opportunities for brands to reach diverse audiences. Major leagues and tournaments are followed by fans from all corners of the world, making football a powerful vehicle for brands looking to expand their market beyond local borders. **The ability to tap cross-cultural markets enables sponsors to establish a global footprint and adapt their messaging to resonate with various demographic groups.**

Football transcends language and cultural barriers, and a well-executed sponsorship can turn a local campaign into a global success. For instance, sponsoring a team in a domestic league could give the brand visibility not just in the host country, but in all countries where the team or league has a fan base, amplified through digital platforms and international broadcasts.

While the emotional and brand-building aspects of sponsorship are vital, brands also benefit from the tangible ROI that football sponsorships offer. Through metrics such as brand recall, engagement rates, and purchase consideration, sponsors can measure the effectiveness of their investment. The data generated through social media interactions, digital campaigns, and match day activations provide concrete insights into how well the sponsorship is performing.

Sponsorships, particularly long-term ones, have the power to create lasting brand impact. As the association between the brand and the team or event strengthens over time, the brand becomes woven into the cultural fabric of the sport, ensuring continued loyalty and visibility long after the sponsorship ends.



**WHAT IS THE
WAY IN FOR
BRANDS?**

NAMING RIGHTS

A naming rights agreement is a contract between a brand and an operator or owner of a venue, building, event, or facility. Under such agreements, a **company obtains the exclusive right to name the venue, often for an extended period, in exchange for royalty payments or other benefits.** This is a highly strategic form of sponsorship as it gives the brand immense visibility, with its name becoming synonymous with the venue or event. For example, when fans visit or watch events at the stadium, they are constantly exposed to the brand name, embedding it into their minds as part of their sports experience.

Naming rights are particularly common in the sports industry for stadiums, arenas, and major sporting events. They offer unique opportunities for brands to strengthen their identity and align themselves with a specific sport, team, or even city. The long-term visibility and exposure gained from naming rights make it a prime asset in a brand's sponsorship portfolio.

In return, the property owner, whether it's a sports team, event organizer, or city government, receives a steady stream of income that helps to fund operations, improve facilities, or boost overall profitability. For instance, prominent stadiums like Allianz Arena or Emirates Stadium serve as prime examples of how naming rights can create lasting associations between brands and iconic sports

venues. The brand benefits from regular mention in media, event broadcasts, and fan discussions, amplifying its presence across multiple channels.

Additionally, naming rights are more than just signage or branding; they can include integrated marketing and activation opportunities that allow the sponsor to engage with the fan base in meaningful ways. This can involve exclusive content, branded experiences, or digital interactions within the venue or across the team's social platforms. This multi-faceted approach to branding helps deepen the brand's connection with the audience.



JERSEY SPONSORSHIP

Jersey sponsorship is one of the **most prominent and effective forms of brand sponsorship in football**. By placing a brand's logo on the jersey worn by players, sponsors gain maximum visibility both on and off the field. Unlike other forms of sponsorship, jersey sponsorship is front and center, visible during every game, press conference, photo op, and fan engagement event. This exposure makes it one of the most coveted assets in football sponsorship, with clubs often receiving significant financial support in exchange for this premium placement.

The primary benefit of jersey sponsorship is the extensive reach and frequency of brand exposure. Football matches are watched by millions globally, with jerseys seen on TV broadcasts, in stadiums, and across social media platforms. This continuous visibility allows brands to be seen by a highly engaged audience. Not only are logos displayed during the 90 minutes of the game, but they are also showcased during replays, highlights, and even in fan merchandise sales, extending the brand's presence far beyond match day.

For brands, the alignment with a successful football team can also foster an emotional connection with fans. When a team performs well, the sponsor reaps the benefits of positive association, as fans link the brand with the team's success. Moreover, jerseys are part of the players' and fans'

identity, which means sponsors become part of a deeply personal connection between the team and its supporters.

In many cases, jersey sponsorships are part of larger, multi-faceted deals that include additional assets like digital activations, VIP experiences, or access to players for campaigns. **This holistic approach allows brands to capitalize on their sponsorship in a variety of ways, ensuring that they are embedded in the entire fan experience.**

In conclusion, jersey sponsorship offers brands not only visibility but also the chance to form a lasting relationship with a passionate fan base. Whether it's the front, back, or sleeve of the jersey, each position represents a valuable piece of real estate that gives brands the ability to be seen, remembered, and cherished by millions of football fans worldwide.

WATCH-OUTS AND BEST PRACTICES

Overexposure and Brand Saturation

Watch-out:

Brands risk becoming overexposed if they are involved in too many sponsorships across multiple teams or events. This can lead to saturation, where the brand loses its uniqueness or significance in the eyes of consumers.

Best Practice:

Carefully select sponsorships that align with your brand's values and target audience. Aim for quality over quantity to ensure each sponsorship delivers a clear and impactful message.

Mismatch Between Brand and Sponsored Entity

Watch-out:

A poor fit between the brand and the team, athlete, or event can damage brand credibility. If fans perceive the sponsorship as inauthentic or misaligned with the values of the sport or team, the brand could face negative backlash.

Best Practice:

Ensure a strong alignment between your brand's values and the entity you are sponsoring. Authenticity is key, so brands should seek sponsorships that reflect their mission, culture, and audience interests.

Performance Dependency

Watch-out:

Sponsorships tied to the performance of a team or athlete can be risky. If the team or player under-performs the brand may suffer by association, leading to diminished fan engagement or even negative sentiment.

Best Practice:

Focus on long-term partnerships that go beyond performance, emphasizing the emotional connection with fans and the broader community impact. Build stories around the team's or athlete's journey, not just their success.

Lack of Activation and Engagement

Watch-out:

Simply placing a logo on a jersey or venue without engaging fans actively can lead to missed opportunities. Passive sponsorships without additional fan interaction risk being forgotten or ignored.

Best Practice:

Engage fans through innovative activation strategies, such as digital campaigns, interactive experiences, and exclusive content. Leverage social media, in-stadium activations, and other channels to create memorable brand interactions.

Cultural Sensitivity and Global Audiences

Watch-out:

Football sponsorships often reach global audiences with diverse cultural backgrounds. Missteps in cultural sensitivity or messaging can lead to negative press and damage brand reputation.

Best Practice:

Understand the cultural nuances of the regions you are targeting. Tailor your messaging and campaigns to resonate with local values and preferences while maintaining the universal appeal of the sport.

Over-reliance on Star Power

Watch-out:

Brands that focus too heavily on an individual athlete may face challenges if the athlete suffers from injuries, scandals, or dips in popularity. The brand can become vulnerable to the athlete's personal circumstances.

Best Practice:

Diversify sponsorship portfolios by combining team, event, and athlete sponsorships. This reduces reliance on any single player and spreads risk across multiple assets.

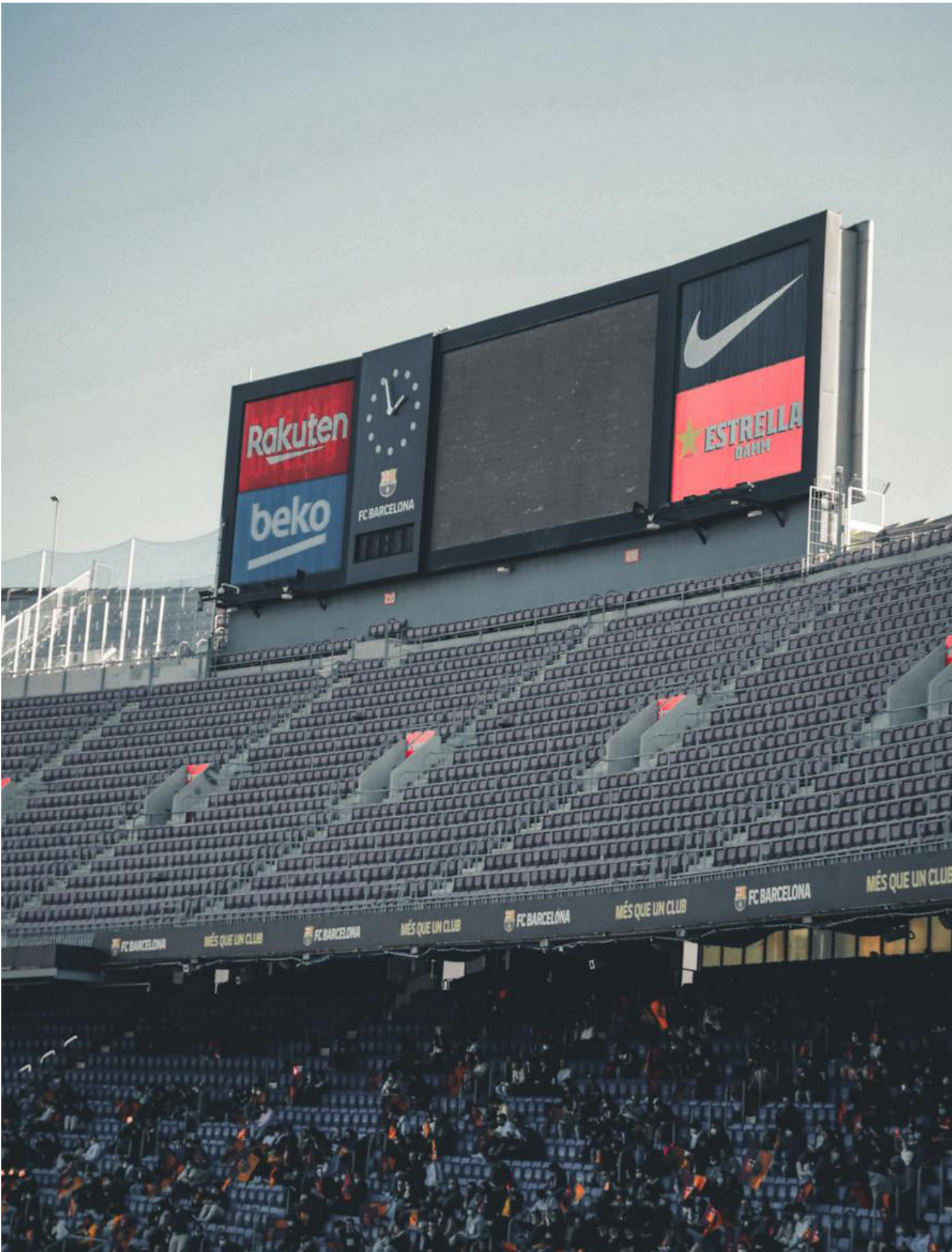
Measuring ROI

Watch-out:

Without clear metrics and data, brands may struggle to evaluate the success of a sponsorship. It's easy to overestimate the impact of sponsorship without proper tools to track performance.

Best Practice:

Implement robust data-tracking mechanisms, including brand recall, engagement rates, social media metrics, and conversion tracking. Set clear goals for each sponsorship, and use fan interaction and sales data to measure success.



ADDITIONAL BEST PRACTICES

- 1. Emphasize Emotional Connections:** Leverage the deep emotional connection between fans and their teams or favourite players. Focus on storytelling and narratives that resonate emotionally, such as behind-the-scenes content, documentaries, or player stories. Engaging with fans on an emotional level strengthens brand loyalty.
- 2. Foster Authenticity and Alignment:** Brands should focus on authenticity by sponsoring teams, events, or athletes that align with their core values. This builds trust with fans and enhances brand credibility, as the sponsorship feels genuine rather than forced.
- 3. Utilize Multi-channel Strategies:** Maximize the visibility of your sponsorship by integrating it across various platforms, including social media, digital content, in-stadium experiences, and even community programs. This creates a 360-degree experience for fans, ensuring they interact with the brand across multiple touchpoints.
- 4. Activate Sponsorship Creatively:** Go beyond logo placement by creating interactive campaigns that invite fans to participate. This could include branded fan zones, social media challenges, giveaways, or digital experiences. Active engagement helps drive deeper fan involvement and brand recognition.
- 5. Localize Global Campaigns:** For global football sponsorships, adapt campaigns to local markets while maintaining a unified brand message. Ensure that the sponsorship resonates within the cultural context of each region and with each fan base, whether through localized messaging or region-specific activations.
- 6. Extend Beyond Match Days:** Build year-round engagement by creating content and campaigns that last beyond match days. This could include offseason activities, player interviews, or community involvement that keeps the brand top-of-mind for fans, even when games are not happening.
- 7. Build Long-term Relationships:** Aim for long-term sponsorship deals that allow the brand to build a deeper connection with both the team and the fan base. Long-term sponsorships foster consistency and credibility, making the brand an integral part of the team's identity and story.
- 8. Collaborate with the Sponsored Entity:** Work closely with the team, athlete, or event to co-create content, activations and campaigns. Collaborative efforts ensure that the sponsorship feels integrated and authentic, and can help you leverage the sponsored entity's unique fan insights.

Successful football sponsorships requires a balance between strategic planning, emotional connection, and creative activation. By understanding the potential risks and implementing best practices, brands can maximize their visibility, foster fan loyalty, and ensure lasting impact from their sponsorship investments.



MEASUREMENT

1.Exposure and Reach

Media Impressions:
Measure impressions and reach across TV, radio, print, and online platforms.

Social Media Metrics:
Measure engagement (likes, shares, comments), reach, and impressions on social media platforms.

Audience Size:
Analyze the size and demographics of the fan base, including TV viewership numbers and attendance figures.

2.Brand Awareness

Consumer / Fan Surveys:
Conduct pre- and post-season surveys to specifically gauge impact on brand recognition and recall among target audiences.

Brand Mentions:
Measure how often and in what context the brand/sponsor is mentioned, in media and on social platforms, related to the property or events.

3.Engagement and Interaction

Fan Engagement:
Evaluate the level of interaction with your brand through sponsored events, contests, or promotions. Assess participation rates and the quality of engagement.

Activation Measurement:
Measure the effectiveness of any activations or campaigns tied to the sponsorship, such as fan contests, meet-and-greets, or branded content.

4.Sales and ROI

Sales Impact:
Analyze any direct correlation between the sponsorship and sales figures. This might include tracking promotional codes, special offers, or product sales spikes during key sponsorship periods.

ROI:
Calculate ROI by comparing the costs of the sponsorship against the benefits achieved. Consider both direct financial returns and indirect benefits, such as increased brand equity.

5.Brand Perception

Sentiment Analysis:
Analyze the sentiment of social media conversations and media coverage about your brand in relation to the sponsorship.

Customer Feedback:
Gather feedback from customers and fans to understand their perceptions of your brand's involvement with the event, team, or player.

6.Partnership Quality

Alignment with Brand Values:
Assess how well the football team's or individual player's values and image align with your brand's values and image.

Activation Opportunities:
Evaluate the quality and quantity of opportunities provided by the sponsorship for brand activations, including in-stadium advertising, digital content, and hospitality.

7.Long-Term Impact

Brand Loyalty:
Measure changes in customer loyalty and long-term brand affinity, potentially through repeat purchase rates or long-term customer surveys.

Market Penetration:
Assess whether the sponsorship has helped in penetrating new markets or demographics.

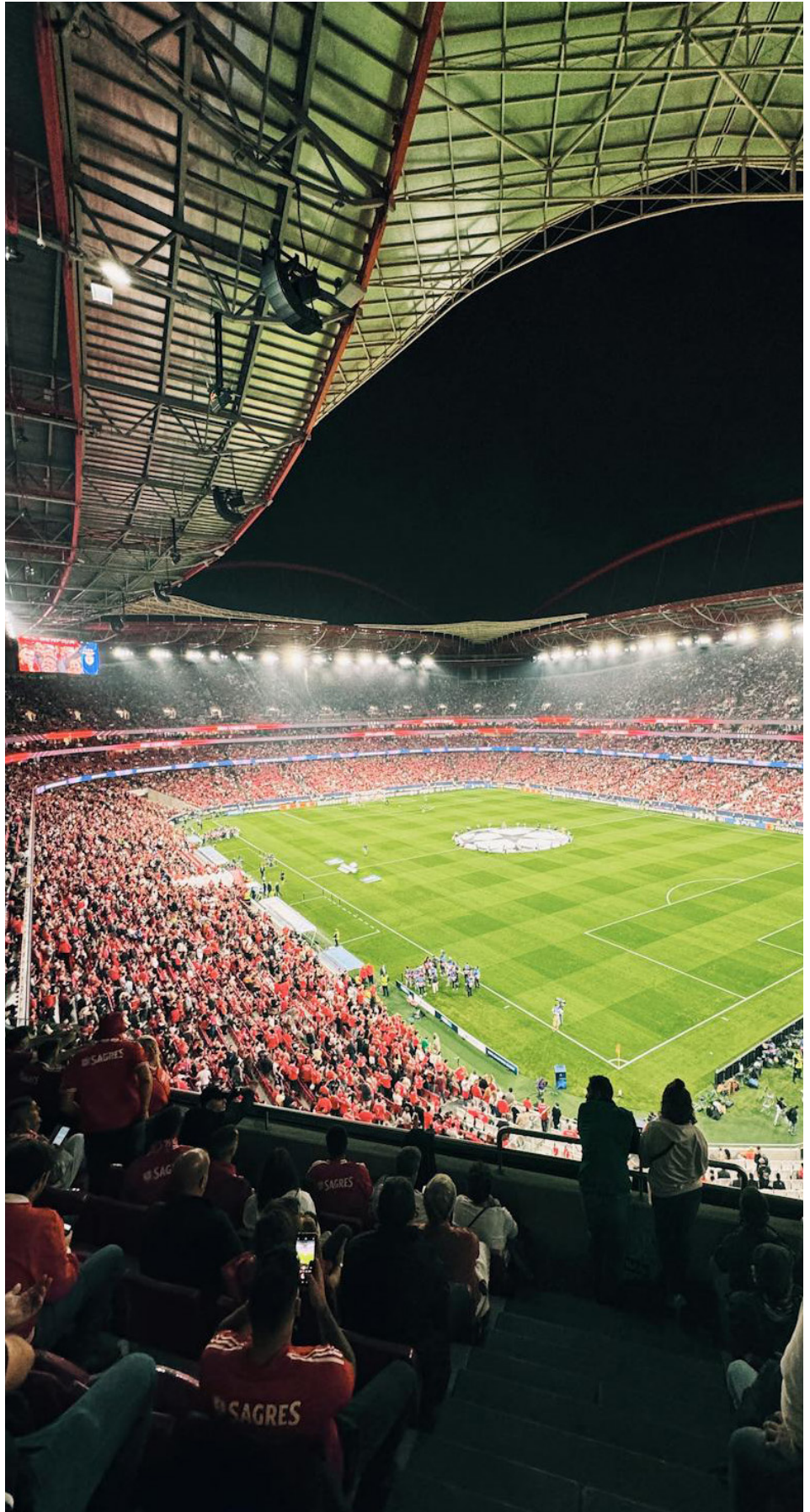
DATA INTEGRATION

Sponsors are increasingly gathering vast amount of data on their own customers through loyalty programs, newsletter sign-ups, and purchasing patterns. Brands are eager to gain similar direct access to football fans, which is why clubs' first-party data has become a gamechanger in sponsorship. **With detailed insights into the demographics, geographics, and preferences of a team's fan base, sponsors can create highly targeted marketing campaigns that resonate with specific audience segments.**

However, Brands should be mindful that many football clubs are still underinvesting in digital infrastructure. While significant resources go toward player acquisitions, the development of a comprehensive digital strategy often lags behind. Fan data is frequently fragmented, with separate silos for ticketing, email lists, and merchandise sales. This lack of integration limits the club's ability to offer a complete, unified view of their fan base to potential sponsors.

By adopting a data-driven commercial strategy clubs could unlock substantial long-term value for themselves and subsequently, sponsors/brands. Consolidating data across different touchpoints such as match attendance, purchases from the club shop, and social media interactions, into a single customer view would allow teams to offer sponsors more valuable insights. Over time, this data could be further enriched by integrating third-party data sources, providing even deeper insights into fan behaviours and preferences.

Furthermore, clubs must recognize that brands use specific metrics to evaluate the effectiveness of their sponsorships. By aligning with these metrics and relentlessly focusing on delivering measurable value, clubs can enhance their appeal to potential sponsors and secure more lucrative, long-term partnerships.



COST EFFECTIVENESS SCALE

Between 11% and 18% of the average brand marketing budget is allocated to sponsorship rights fees and activation spend, making sponsorship the second largest marketing communication expense after media for many brands. A typical sponsorship portfolio may encompass properties from diverse geographies, contract terms, and verticals, spanning sports, arts, music, community, and culture, each targeting distinct brand objectives.

Sponsorship costs are not limited to acquisition; **activation spend is critical for maximizing the sponsorship's potential.** A well-executed activation plan ensures that the sponsor leverages every possible benefit from the partnership, but this comes with varying degrees of investment depending on multiple factors such as country market, competitive category, and the sponsor's overall objectives for the property.

Sponsorship and activation budgets can vary significantly across regions and categories. For example, a team in a major urban market might require a more comprehensive activation strategy compared to one in a small, regional setting. Similarly, a consumer goods brand sponsoring a high-profile event like the UEFA Champions League would need a full 360-degree activation plan encompassing packaging, media, and experiential touchpoints across multiple markets to fully capitalize on its rights fee investment.

On the other hand, not all properties in a brand's portfolio necessitate such a comprehensive approach. A smaller, regional property may not justify full activation across the brand's entire connections mix. For example, a sponsorship in a local sports league might be activated through social media and in-store promotions rather than through large-scale media campaigns or product packaging changes.

In the case of global sponsorships, rights fees may be covered by the brand's global sponsorship budget, while individual country markets are responsible for activating the sponsorship locally. However, this decentralized approach can lead to inefficiencies; the local market might not report activation costs back to the global center, nor have visibility into the proportion of the rights fee allocated to their specific market.

Determining the ideal ratio of activation spend to rights fee requires careful consideration of market dynamics, property types, and brand objectives. By tracking activation spend, setting performance benchmarks, and aligning internal and external stakeholder expectations, brands can optimize their investment across the sponsorship portfolio, ensuring maximum return on both rights and activation.

COUNTRY SPECIFIC CALLOUTS

Sponsorship regulations in football vary significantly across countries and competitions, influenced by both international governing bodies like UEFA and local legislative frameworks. These regulations primarily focus on restricting sponsorships related to industries such as gambling, alcohol, and tobacco, which are seen as potentially harmful or controversial. Below are some key country-specific callouts related to sponsorship rules in the Football industry:

1. UEFA Regulations

UEFA, the governing body for European football, imposes strict rules on what clubs can and cannot feature on their kits. A notable restriction is the blanket ban on tobacco and “strong alcohol” sponsorships for any team participating in UEFA competitions. Strong alcohol is defined as any beverage with more than 15% alcohol by volume (ABV) unless domestic legislation sets a lower limit. This regulation is intended to promote responsible advertising standards across European football.

2. Gambling Sponsorship Bans

Several European countries have moved toward stricter regulations on gambling sponsorships, a major revenue stream for many clubs:

a. Italy, Switzerland, and Spain have all implemented nationwide bans on gambling advertisements, including shirt sponsorships for football

clubs. These measures are part of broader efforts to curb the promotion of gambling, which has been a contentious issue due to concerns over its impact on society.

b. In contrast, certain countries, like the Netherlands, Turkey and Slovenia, allow state-regulated gambling companies to sponsor sports teams. This reflects a more controlled approach to gambling sponsorship, where only licensed operators are permitted to engage in such partnerships.

c. In England, the Premier League clubs voluntarily agreed, in 2023, to phase out gambling companies as front-of-shirt sponsors starting from the 2026/27 season. This move demonstrates growing concerns around the social impact of gambling and its prominence in football sponsorship.

d. As of today, 16 football leagues around the world have active bans on sports betting sponsorships, though the nature of these bans varies by country. Some allow limited forms of betting-related sponsorships, while others enforce a complete prohibition. The global regulatory landscape is increasingly fragmented, with sponsorship rules evolving in response to societal pressures and government policies.

3. Alcohol, Tobacco, and Political Sponsorship Bans

While restrictions on alcohol, tobacco and political sponsorships are a common theme across many Football leagues, the specifics can differ:

a. Twenty-one leagues globally have implemented bans on sponsors linked to alcohol, tobacco, or political entities. These include prominent leagues in countries with strong regulatory environments aimed at protecting public health and maintaining neutrality in political matters.

b. Exceptions exist for alcohol sponsorships in some European countries, where lower alcohol content beverages (under 15% ABV) may still be promoted, as long as they comply with both UEFA and domestic regulations.



LUMENCY EXPERTISE IN THE SPACE

As a recognized sponsorship consultancy agency established in 1996, Lumency specializes in providing tailored solutions for brands looking to maximize the impact of their sports sponsorship investments. Our client-centric business model ensures that we deliver bespoke strategies, uniquely crafted to address each client's specific objectives, whether they are targeting global events or local partnerships.

With decades of experience, we have conducted in-depth sponsorship valuations for some of the world's most prestigious football events and entities, including the FIFA World Cup, Copa América, UEFA Champions League, as well as local leagues like La Liga, English Premier League, Ecuador's Liga Pro, individual teams like Club América, Atlas FC, Barcelona de Guayaquil, and national teams like Peru, Colombia, Mexico, Ecuador and Panama. Our expertise extends across diverse markets, enabling us to offer insights that bridge global opportunities with localized fan engagement strategies.

By combining rigorous data analysis, industry expertise, and an understanding of market trends, we help brands navigate the complex sponsorship landscape, ensuring their investments generate measurable returns and long-term value.

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