

Lumency

2026 Global Sponsorship Trends

The brand owner lens.

January 2026

Framing

Sponsorship continues to grow in scale and organizational importance. Across brand-owner organizations, sponsorship now represents a material share of total marketing investment, accounting on average for roughly 10–12% of overall marketing budgets. Global sponsorship investment is estimated at around USD \$120B heading into 2026, with mid- to high-single-digit growth expected through 2030. That is enough to keep scrutiny high.

As sponsorship investment has scaled, it has moved out of the margins of marketing decision-making. It now sits alongside other major channels when leadership considers performance, trade-offs, and accountability. This shift in exposure is changing how sponsorship is managed inside brand-owner organizations.

This report outlines ten independent trends we see in how sponsorship is being managed for 2026. The lens is deliberately operational. The focus is not on why brands sponsor, nor on forecasting winners and losers among individual properties or categories. Instead, it examines how sponsorship is governed, activated, measured, and defended as expectations rise.

Each trend stands on its own and is grounded in brand-owner practice, Lumency's work with global organizations, and broader industry evidence. Together, they describe a sponsorship environment where participation is assumed and performance is increasingly required. That is a very different operating context than even five years ago.

The Trends

1: Sponsorship enters an optimization cycle

What's happening

Sponsorship is shifting into a period of active optimization. For many brand owners, that shows up first in renewals and reallocations. Optimization is no longer just about portfolio mix. It now extends into governance, activation discipline, and performance management, all in service of clearer commercial and brand objectives.

As sponsorship matures inside brand-owner organizations, it is increasingly evaluated alongside other marketing investments. Expectations around discipline, comparability, and accountability are rising. Tolerance for weak execution, vague performance narratives, and opaque decision-making is declining. Those issues increasingly trigger deeper internal scrutiny of sponsorship spend.

Evidence & indicators

Across marketing, optimization has become the default state for mature channels, with leadership expecting consistent performance frameworks, clearer trade-offs, and defensible investment decisions. Sponsorship is increasingly subject to the same expectations.

Brand-owner practice shows growing pressure to explain sponsorship performance in ways that align with broader marketing evaluation norms, particularly at renewal and reallocation moments. While overall sponsorship investment levels remain broadly stable in 2026, leadership attention has shifted away from expansion of opportunities and toward how effectively existing investments are being managed.

Persistent challenges around ROI articulation, comparability, and performance visibility indicate that sponsorship management practices in many brand owner organizations have not kept pace with the expectations applied to other forms of marketing spend.

What it means for brand owners

The bar for sponsorship performance clarity is rising. Risk increasingly stems from execution discipline and governance gaps, not from poor strategy.

Brand owners that cannot evaluate and explain sponsorship performance with the same clarity applied to other marketing investments face growing friction at the exact moments that matter most. Renewals, reallocations, and cross-channel trade-offs are where that gap becomes visible.

2: Fewer platforms, deeper integration

What's happening

As optimization pressure increases, many brand owners are now asking a basic question. How much complexity can their sponsorship portfolios realistically support. Rather than spreading investment across a growing number of platforms and properties, attention is shifting to fewer sponsorships that can deliver deeper integration across markets, channels, and internal stakeholders.

This shift is being driven less by cost reduction and more by execution realities. Fragmented portfolios create coordination challenges across activation, measurement, rights management, and internal ownership, often visible in duplicated work, inconsistent creative, and competing priorities in market. As expectations around performance and accountability rise, investments that cannot be activated consistently or integrated cleanly are harder to defend.

Evidence & indicators

Brand-owner practice data shows that sponsorship portfolios have grown over time, with the average brand now investing across more than two sponsorship categories, up from closer to one historically. While this diversification has expanded reach and relevance, it has also increased governance and execution complexity.

At the same time, brand owners consistently cite execution and integration as limiting factors. Activation responsibility, measurement, and rights utilization are often fragmented across internal teams and partners, reducing consistency and comparability.

Industry commentary heading into 2026 points to a re-concentration of future investment around fewer, more scalable sponsorship platforms. Multi-market properties and major tentpole properties that can support consistent activation across media, retail, content, and experience are increasingly prioritized, while platforms that only enable isolated or one-off activations face greater scrutiny.

What it means for brand owners

Portfolio architecture now matters as much as portfolio size. Brand owners must assess sponsorships not only on strategic fit, but on their ability to integrate effectively into the broader marketing mix.

As portfolios concentrate, the upside of strong platforms increases, but so does the downside of underperforming ones. Decisions about what remains in the portfolio increasingly hinge on execution scalability and integration potential, not just brand and commercial alignment.

3: Activation effectiveness becomes the value driver

What's happening

As sponsorship portfolios concentrate, differences in performance are increasingly driven by how sponsorships are activated rather than by the rights themselves. Comparable sponsorships are delivering materially different outcomes based on execution quality, integration across channels, and consistency over time. The same global property can outperform in one market and underperform in another, purely on the strength of activation discipline.

This shift does not take away from the importance of sponsorship selection. Strategic fit still establishes potential. What is changing is that activation effectiveness increasingly determines how much of that potential is realized.

Evidence & indicators

Brand-owner practice shows that sponsorship fees continue to increase across many categories, outpacing inflation and increasing the cost of underperformance. At the same time, performance variance is increasingly seen within the same sponsorship, not just across different property categories. Identical rights are producing materially different outcomes across markets, regions, or business units, most often due to differences in activation discipline, local integration, and ownership rather than differences in the rights themselves.

Activation effectiveness is also becoming clearer as the result of a capacity constraint. Even well-chosen sponsorships underperform when internal teams and external partners are stretched beyond what they can activate effectively. As portfolios concentrate, the number of platforms that can be activated well becomes limited by people, process, and coordination rather than by ambition or intent.

Brand-owner practice data continues to indicate that under-activation remains common. Many sponsorships do not fully utilize available rights or activation potential, particularly where activation responsibility is distributed across teams and partners, leading to uneven execution and inconsistent outcomes.

What it means for brand owners

Sponsorship selection establishes potential, but activation effectiveness increasingly determines realized value. In concentrated portfolios, execution quality becomes more consequential, as fewer platforms carry a larger share of results.

Brand owners need to assess not only whether a sponsorship is a strategic fit, but whether it can be activated consistently within existing resource capacity. Activation effectiveness becomes a practical constraint on portfolio performance, not a downstream creative consideration. If a sponsorship cannot be activated well, it will not perform, regardless of how strong the rights look on paper.

4: The measurement gap is now a strategic risk

What's happening

Sponsorship measurement capability is established, but adoption and consistency remain uneven. As sponsorship is evaluated alongside other marketing investments, choosing not to measure is becoming harder to justify. The gap is no longer technical. It is behavioral, organizational, and political, and that makes it harder to fix with tools alone.

In some organizations, sponsorship decisions continue to rely on how things have always been done, relationships, or instinct, even as accountability expectations have risen

elsewhere in the marketing mix. This creates growing tension between how sponsorship is managed and how investment decisions are scrutinized.

Evidence & indicators

Across marketing, standardized KPIs, benchmarks, and cross-channel comparability are now baseline expectations. Sponsorship is increasingly expected to stand up to the same scrutiny.

Brand-owner practice data shows ROI measurement cited by roughly three quarters of brand owners as the top sponsorship challenge, ahead of rights access or activation complexity. Despite this, investment in sponsorship measurement typically runs below 1% of spend, significantly lower than what's seen in other marketing channels (closer to 3%).

This gap persists even though sponsorship represents a substantial share of total marketing budgets. As a result, the financial and internal reputational risk associated with poorly substantiated sponsorship decisions continues to increase. In many brand owner organizations, this is now the primary reason sponsorship gets challenged.

What it means for brand owners

The strategic risk isn't that sponsorship can't be measured, but that gaps in measurement signal weak governance. These gaps tend to surface at times that matter most, including renewals, reallocations, and cross-channel trade-offs.

Brand owners that can't articulate sponsorship performance with the same clarity applied to other marketing spend face growing internal friction, even when sponsorship is delivering value. In this environment, inconsistency in measurement becomes a functional liability.

5: Data shifts from pilot to plumbing

What's happening

As sponsorship portfolios mature, data is increasingly treated as an asset developed through partnership design rather than as a byproduct of individual activations. Sponsorships are structurally well suited to generate first- and zero-party data through experiences, communities, and direct engagement, but only when data capture, consent, and integration are planned.

What is changing is not the availability of data, but expectations around how it is handled, shared, and reused. One-off pilots, campaign-bound data capture, and disconnected activations no longer scale in a context where sponsorship is expected to contribute durable value.

Evidence & indicators

Across marketing, direct audience relationships have become a priority as third-party signals weaken and access through external media and data environments becomes less reliable. Leadership increasingly expects marketing channels to contribute owned data assets that can be reused across touchpoints.

Brand-owner practice shows that sponsorship-generated data is often captured in isolation and rarely integrated into core CRM, marketing automation, or customer data platforms. As a result, high-engagement sponsorship programs frequently fail to create reusable data assets that compound in value over time.

This disconnect persists despite sponsorship's natural strengths. Live experiences, fandom, and community contexts consistently produce higher intent and opt-in rates than passive media exposure, yet those moments are often not designed to generate durable data assets.

What it means for brand owners

The value of sponsorship-generated data is increasingly determined upstream, at the point of deal design and broader activation planning, not downstream in reporting on individual activations. When data capture and ownership are not explicitly designed into partnerships, engagement remains campaign driven and value decays quickly.

Brand owners that treat data as plumbing can turn sponsorship into a durable source of audience insight and addressability. Those that do not are left with strong moments but weak data assets. The shift is from asking what an activation delivered to asking three basic questions. What data asset did this partnership create. Who owns it. How will it be used across the rest of the marketing system.

6: Cultural relevance becomes a portfolio design principle

What's happening

Sport delivers some of the most powerful cultural platforms in sponsorship, delivering scale, shared moments, and enduring emotional resonance. What's changing is how cultural relevance is defined and sustained across audiences.

For Gen Z and younger Millennials, culture is increasingly experienced and expressed through demonstrations of identity, with music, creators, and community playing a stronger role than they did for previous generations. Sport still matters, but younger audiences increasingly consume it through highlights, personalities, social platforms, and cultural moments rather than through traditional, linear fandom alone.

In response, brand owners are refining how they design sponsorship portfolios, sometimes keeping sport as a core anchor and sometimes adding cultural platforms outside sport that extend relevance across different contexts, behaviors, and modes of participation, for example, music festivals, creator events, gaming, or community events that reach audiences sport does not. This shift is most visible among more mainstream categories that historically leaned heavily on sport-led reach and are now complementing it with broader cultural presence.

Evidence & indicators

Sport continues to account for most of the global sponsorship investment by brand owners, representing about 70% of total rights fee spend and reinforcing its role as the backbone of most brand-owner portfolios. At the same time, brand-owner practice shows portfolios broadening over time, with the typical brand now investing across two or more sponsorship categories, compared to closer to a single category historically. This reflects a shift not away from sport, but toward more diversified portfolio design as brands seek to balance scale, relevance, and execution realities.

External industry analysis points to growing investment in broader cultural ecosystems, including music, creators, lifestyle, gaming, arts, and community platforms, which offer different forms of engagement and identity expression for consumers than sport delivers on its own. These investments are additive rather than substitutive. Non-sport platforms are increasingly used to extend cultural presence, participation, and continuity across audiences and moments, while sport continues to anchor reach and shared cultural scale.

What it means for brand owners

Cultural relevance is increasingly managed at the portfolio level rather than through any single sponsorship. Sport continues to anchor scale and shared moments, while in many cases also serving as a conduit for music, fashion, creators, and social identity. Complementary cultural platforms extend how and where brands participate in culture.

Brand owners must evaluate sponsorships, sport and non-sport, based on the distinct roles they play in expressing brand identity and values, engaging audiences, and sustaining relevance across changing consumption behaviors, rather than treating cultural platforms as interchangeable or experimental add-ons.

7: Women's sport moves from emerging to established growth lane

What's happening

Women's sport is crossing key thresholds in audience scale, commercial participation, and sponsorship maturity. What was once treated primarily as experimental, values-led, or additive is increasingly approached as a durable growth category within sponsorship portfolios, with clearer commercial expectations and longer investment horizons.

Evidence & indicators

Audience scale and engagement in women's sport have accelerated significantly over the past several years, across live attendance, broadcast, and digital consumption, with double-digit growth across multiple leagues and events and continued momentum projected into 2026, and beyond.

Sponsorship revenues have grown, with industry estimates indicating that women's sport sponsorship revenues have roughly tripled since 2022, moving the category well beyond pilot-level investment.

Rights holders are introducing stronger pricing discipline, clearer inventory definition, and more consistent multi-year deal structures, reducing reliance on discounted or purely values-based positioning.

Category participation has broadened beyond early adopters, with increased investment from financial services, CPG, automotive, and technology brands, signaling wider brand owner confidence.

Athlete-led ecosystems are maturing, with leading women athletes growing meaningful owned audiences and landing sizable commercial partnerships, reinforcing the role of individuals as scalable sponsorship assets in the space alongside teams and leagues.

What it means for brand owners

Women's sport increasingly requires the same strategic rigor applied across the sponsorship portfolio. As scale, pricing, and expectations rise, brand owners need clearer role definition, differentiated activation strategies, and performance frameworks aligned to commercial and brand objectives. The opportunity remains strong, but the rights holder category now demands sharper choices and clearer accountability than pilot logic allows.

8: Brand-to-brand collaboration formalizes within sponsorship ecosystems

What's happening

As sponsorship portfolios concentrate around fewer, more scalable platforms, collaboration between co-sponsor brands is becoming more intentional and more structured. In this context, brand-to-brand collaboration refers to two or more sponsoring brands deliberately working together within a shared property or platform to create joint value that would be difficult to achieve on their own.

These collaborations go beyond simple logo adjacency. They typically involve shared activation programs, coordinated use of one another's channels, and mutual audience exposure, enabled by the common context and credibility of the sponsorship

platform, for example, a financial services brand and a retailer co-creating offers within the same league platform.

Evidence & indicators

Brand-owner practice data shows a growing occurrence of sponsorships involving multiple independent activating brands, particularly around major properties and multi-market platforms.

The primary value driver is audience access. Brand-to-brand collaboration enables brands to reach audiences they do not efficiently reach on their own, especially where one brand's core audience overlaps with another brand's growth audience.

Collaboration increasingly extends beyond shared moments to shared channels. Effective partnerships provide access to each other's owned and operated channels, customer bases, and engagement ecosystems, increasing scale and frequency without incremental rights investment.

Despite growing interest, execution friction can be high. Brand owners consistently cite partner identification, role clarity, governance, and performance measurement as the primary challenges.

Formal operating models lag volume. Most collaborations are still managed informally, limiting repeatability and the ability to scale value across a brand owner's portfolio.

What it means for brand owners

Collaboration between independent brands is shifting from opportunistic to strategic. When defined and governed intentionally, it becomes a multiplier, expanding audience reach, accelerating growth, and improving returns on existing investments. Without clear structure and performance measurement, collaboration risks adding complexity without delivering incremental value.

9: Fan-first, community-led models reshape sponsorship value

What's happening

Sponsorship is increasingly judged by the quality of the audience relationship it can enable, not just the exposure it delivers. Brand owners and rights holders are placing greater emphasis on direct, identifiable, and repeat engagement with fans, moving beyond one-way visibility toward two-way participation and community connection.

This shift does not replace reach or awareness. It reframes how sponsorship contributes value, particularly where brands should build durable audience relationships through adding value to fan experience rather than rely on brand impressions that might be

missed or ignored. A full stadium moment still matters. An always-on community that you can identify and talk to again often matters more.

Evidence & indicators

Rights holders are investing more heavily in owned audiences. Leading leagues, teams, and properties are prioritizing membership programs, apps, databases, and direct communication channels alongside traditional measures like attendance and broadcast reach.

Participation and community correlate more strongly with long-term outcomes for both brand owners and rights holders. Marketing research consistently shows that active engagement builds loyalty, advocacy, and repeat behavior over passive exposure alone.

Brand-owner practice data shows rising emphasis on experiential and participatory activation. Activation budgets are increasingly directed toward programs that enable opt-in engagement, repeat interaction, and identifiable audiences rather than one-off moments.

Programs designed for continuity outperform single-moment activations. Sponsorships that support ongoing interaction and community development are increasingly favored over those built just for peak exposure.

What it means for brand owners

Sponsorship evaluation increasingly extends beyond reach metrics to include relationship depth and durability. Brand owners need to assess how sponsorships contribute to ongoing audience connection and brand equity over time, alongside traditional performance measures. The question shifts from how many people saw the sponsorship to how the sponsorship strengthens the brand's relationship with the people who matter most.

10: Intermediary differentiation shifts toward IP and decision enablement

What's happening

Automation, AI, and optimisation pressure are compressing lower-value service layers. As a result, differentiation among intermediaries (agencies, consultancies, research providers, data sources) is increasingly shifting away from execution alone and toward insight, decision frameworks, operating models, and proprietary IP that support more rigorous sponsorship management.

This stems from rising expectations around consistency, comparability, and defensibility as sponsorship is evaluated alongside other marketing investments.

Evidence & indicators

As delivery models converge, basic execution alone is becoming less distinctive across agencies and consultancies. In response, intermediaries are increasingly positioning benchmarks, systems, and decision frameworks as primary sources of differentiation.

Decision support is moving earlier in the process, with greater emphasis on tools and frameworks that help structure, compare, and explain sponsorship decisions rather than simply execute them. Proprietary IP is increasingly embedded into ongoing client workflows, replacing one-off analysis or advisory as expectations around rigor, consistency, and defensibility increase.

What it means for brand owners

How external partners are evaluated is changing. As sponsorship management expectations rise, brand owners are increasingly focused on the differences in the quality of decision support, clarity, and rigor provided by their partners.

Where intermediaries bring structured frameworks, benchmarks, and embedded tools, sponsorship decisions are easier to explain, defend, and govern internally. Without them, brand owners face greater exposure at moments of review, renewal, and reallocation.

The direction of travel for 2026

Sponsorship continues to grow in scale and organizational importance. What is changing is how sponsorship is evaluated inside brand-owner organizations.

Sponsorship is increasingly assessed by leadership alongside other marketing channels. Expectations around clarity, comparability, and accountability are rising. Participation in sponsorship is assumed; performance must be demonstrated.

The trends outlined in this report point to a clear direction of travel. Optimization pressure is concentrating on execution quality, governance discipline, and the ability to explain value at critical decision moments. Measurement and data increasingly determine whether sponsorship can be defended and sustained. Portfolio design, not just individual deal selection, is shaping outcomes.

For brand owners, the implication is straightforward. The greatest risks to sponsorship performance now sit less in strategic intent and more in how sponsorship is managed, activated, and evaluated over time. Strong platforms underperform without consistent execution. Valuable programs face pressure when performance narratives lack clarity.

Organizations that adapt their operating models, strengthening governance, sharpening activation effectiveness, and formalizing measurement, will be better positioned to defend and sustain sponsorship's role within the marketing mix. Those that do not may

find sponsorship challenged not because it lacks relevance, but because its value is harder to defend when scrutiny is highest.

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