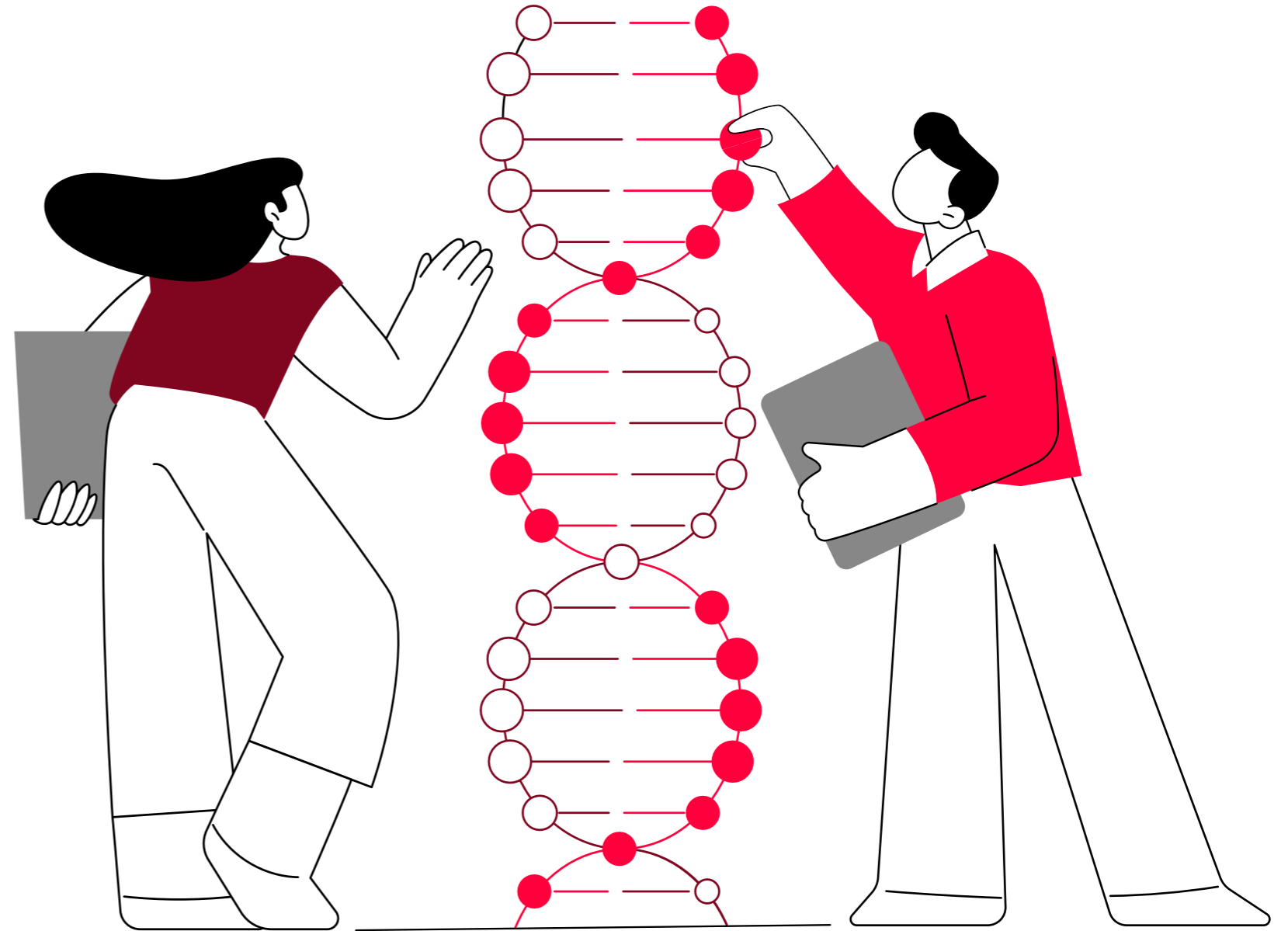




Global Sponsorships and Partnerships

The evolution of client practices

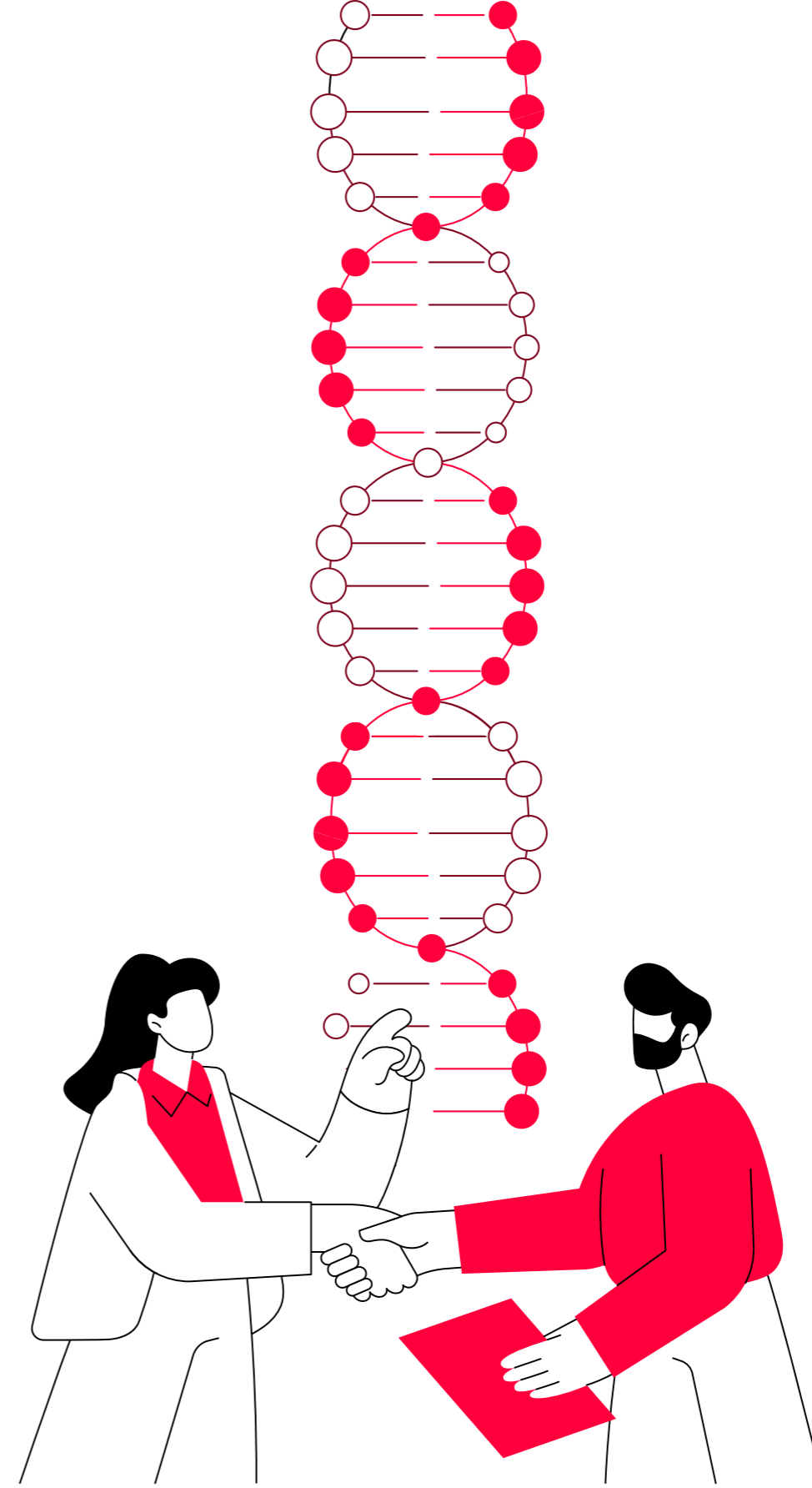
In partnership with:



November 2025

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Foreword

This second World Federation of Advertisers x Lumency Global Sponsorship Study builds on our 2023 benchmark report, offering an aggregated, bi-annual view of how brand-owner sponsorship practices are evolving within the industry. By looking at change over time, we can now see where progress is real, and where challenges persist.

Lumency is a brand-side sponsorship consultancy focused on helping global marketers bring structure, measurement, and governance to their sponsorship portfolios. Working in partnership with the WFA, this report combines practitioner insight with the collective experience of the world's leading brand owners.

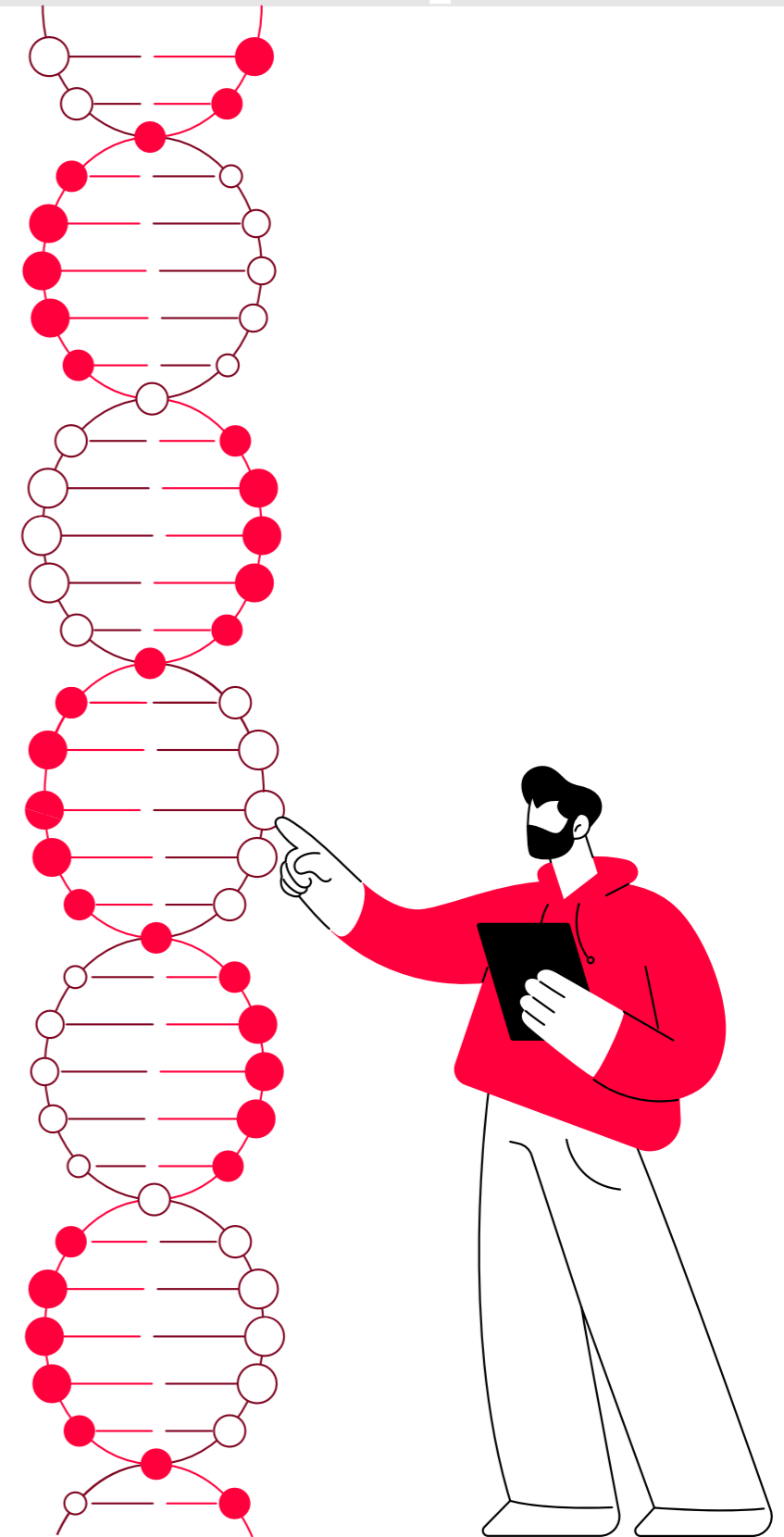
Looking across the 2023 and 2025 findings, clear trends have emerged. Investment and optimism are rebounding. Portfolios are broadening, extending into culture and passion points that connect brands more directly to lived experience. Governance and valuation frameworks are strengthening, helping organizations manage sponsorship with greater discipline and transparency.

Still, measurement remains underfunded. While tracking accuracy has improved, few brands invest proportionately in impact assessment, leaving a gap between accountability expectations and capability.

This report captures that ongoing evolution: sponsorship becoming more strategic, more measurable, and more integrated within the marketing system. The discipline continues to mature, and with it, so does the opportunity to drive both brand and business performance.

Ian Malcolm
President & CEO,
Lumency

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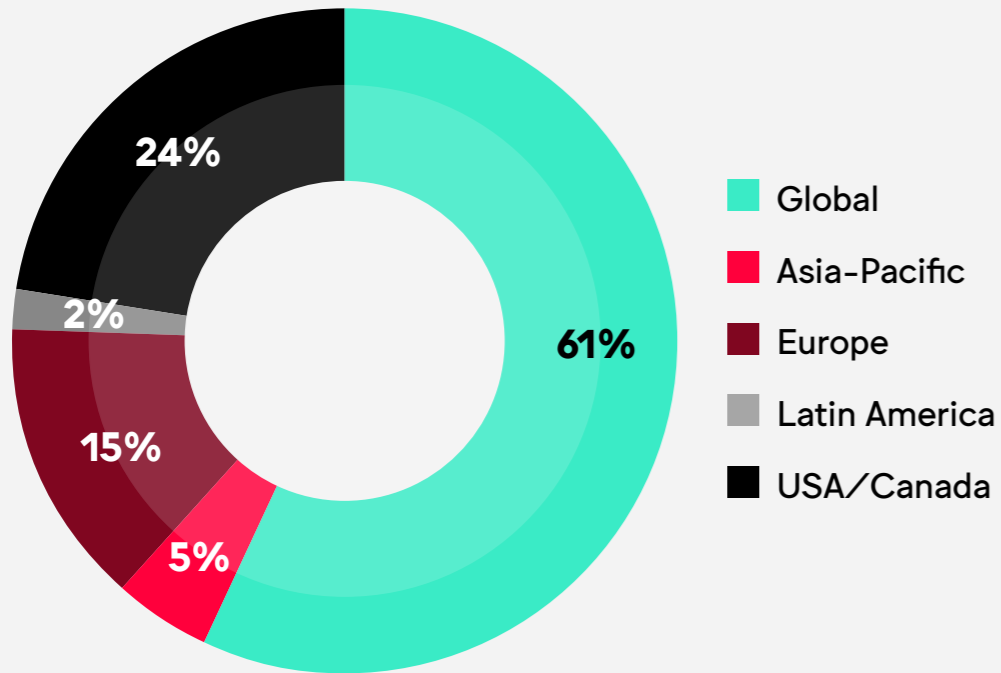


About this research

- 15 Minute Voluntary Online survey conducted mid-2025 in partnership with Lumency amongst WFA members
- The data presented is based on anonymized and aggregated responses of 41 brand owners from 17 product & service categories
- All respondents hold at least national level/multi-country responsibility with 61% in broader global roles
- The majority of respondents have worked in (or been adjacent to) the sponsorship function for over 6 years
- The survey did not disclose any commercially sensitive information, and individual responses remain confidential.

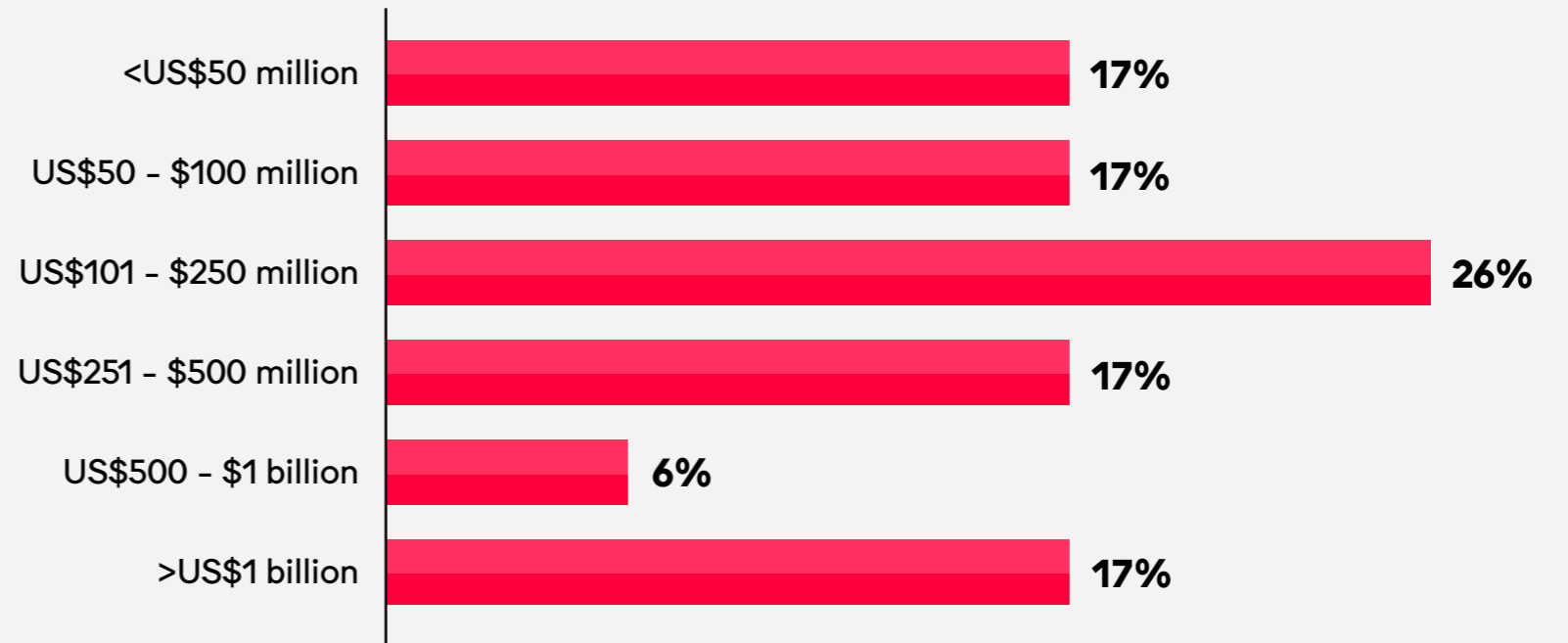
Respondents represent **USD \$74.9B in marketing spend** and **USD \$8.2B in sponsorship**, a little over 7% of total estimated global sponsorship spend

Q. Which geography best describes your area of responsibility?



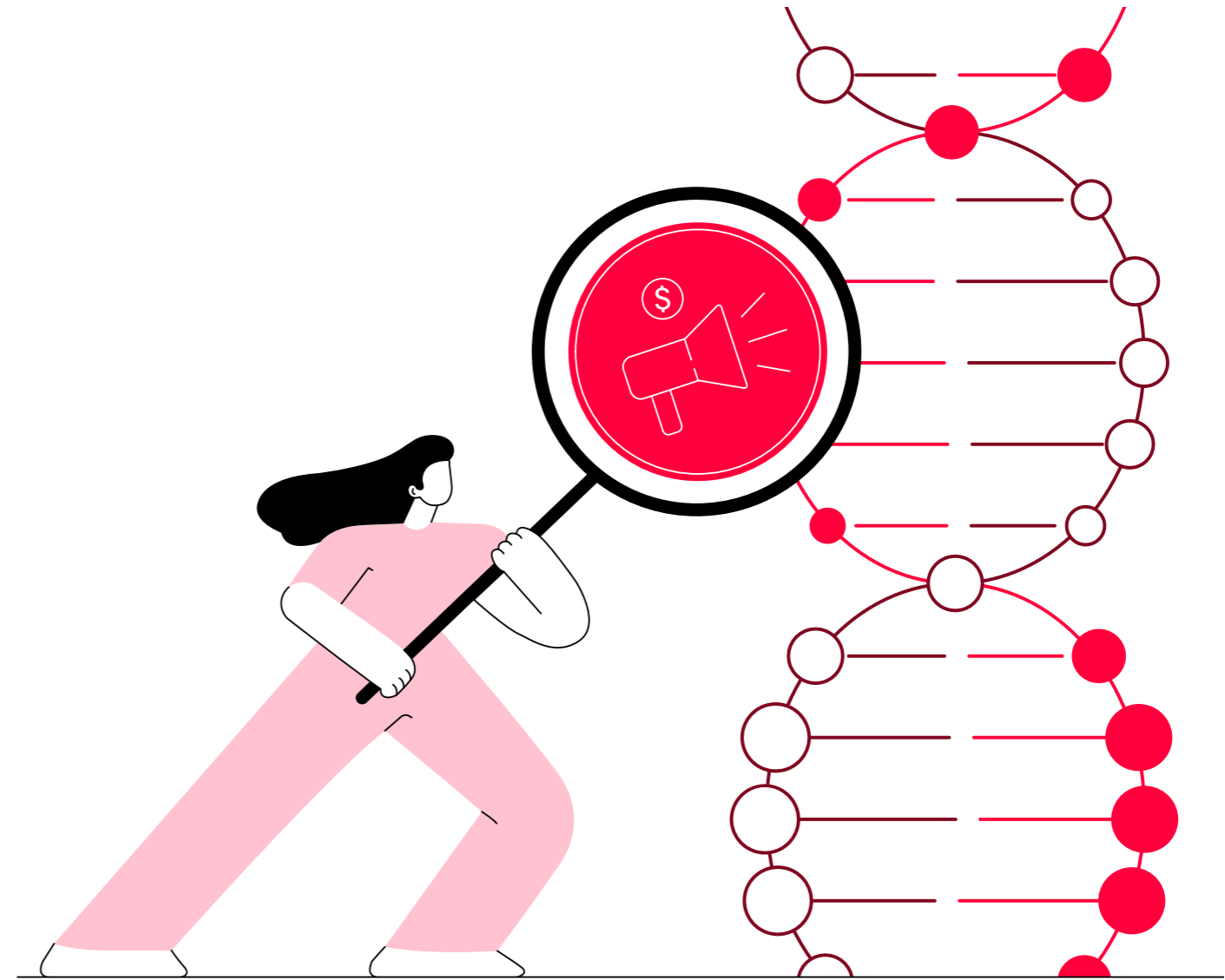
Source: WFA & Lumency Online survey; Base: (n) = 41 Brand Owners

Q. What range is the closest to describe your annual marketing (incl. media) budget?



Source: WFA & Lumency Online survey; Global Sports Sponsorship Market, Research and Markets, Nov 2024

Sponsorship



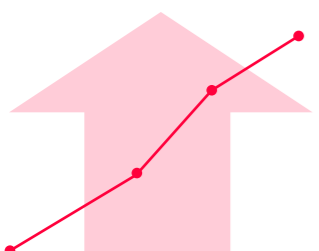
Executive summary

Sponsorship investment is rebounding and becoming more strategically distributed, with stronger optimism for the years ahead

11% of marketing budgets now go to sponsorship and activation.

41% of brands now invest 5–10% of total budgets, more than double in 2023.


Most expect **growth to continue over the next 2–3 years**; those anticipating cuts have dropped from 31% to 17% 2023 to 2025.



Portfolios are broadening across culture and passion points.

Brands are spreading investment across more categories than in 2023.

x2 Number of brands investing in Music and Arts doubled since 2023, signaling a stronger industry pivot to cultural and lifestyle relevance.

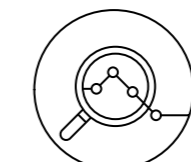


Activation spend is slightly lower, but tracking is stronger.

For every **\$1** in sponsorship rights, brands now invest \$0.76 in activation.

Down from \$0.81 in 2023, indicating greater efficiency.

Tracking discipline has improved: only 22% remain unaware of activation spend, down from 41% in 2023.



Executive summary

Brands are strengthening strategy, governance and accountability, but ROI measurement remains the industry's biggest challenge

Strategic and structured investment practices are now the industry norm.

Over **60%** of respondents have a specific sponsorship strategy. These approaches are largely varied and fragmented: some brand-led, others passion point or ROI-driven.

1/2 More than half have established a formal governance model. These range from global oversight models to evaluation-led and framework-driven approaches.

55% have a valuation framework to assess property worth and alignment. Largely media valuation led and some reliance on historical benchmarks.

Measurement remains an underinvested area.

ROI measurement remains the biggest industry challenge.

< 1%

of total sponsorship budgets are dedicated to the practice.

Top of Funnel metrics continue to be key success indicators with some focus on bottom funnel metrics.



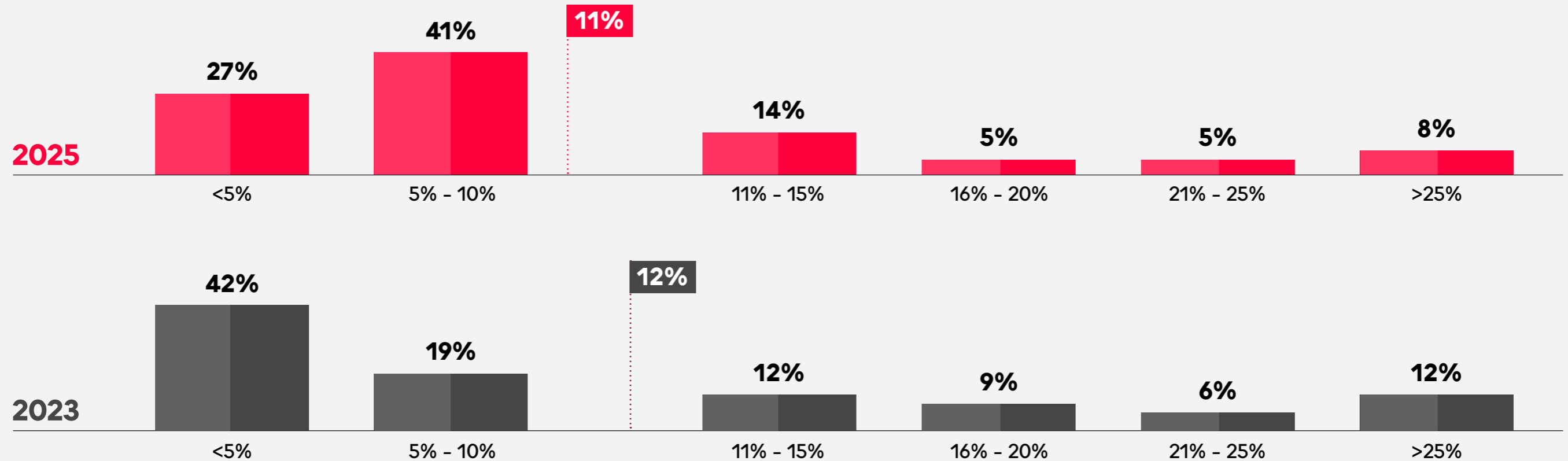
Awareness, Familiarity, Consideration, Purchase Intent, and Advocacy continue to dominate as core KPIs, highlighting a persistent focus on brand-building over commercial attribution.

Sponsorship investment

Respondents are recalibrating sponsorship spend toward more moderate, sustainable levels

On average* **approximately 11%** of marketing budgets were allocated to sponsorship and activation.

Q. Of your organization's total marketing (incl. media) budget, approximately what % was allocated to sponsorship (incl. rights fees and activation spend)?



*Weighted average assuming normal distribution within % ranges.

Source: WFA & Lumency Online survey; Base: (n) = 37 Brand Owners (2025), 34 Brand Owners (2023)

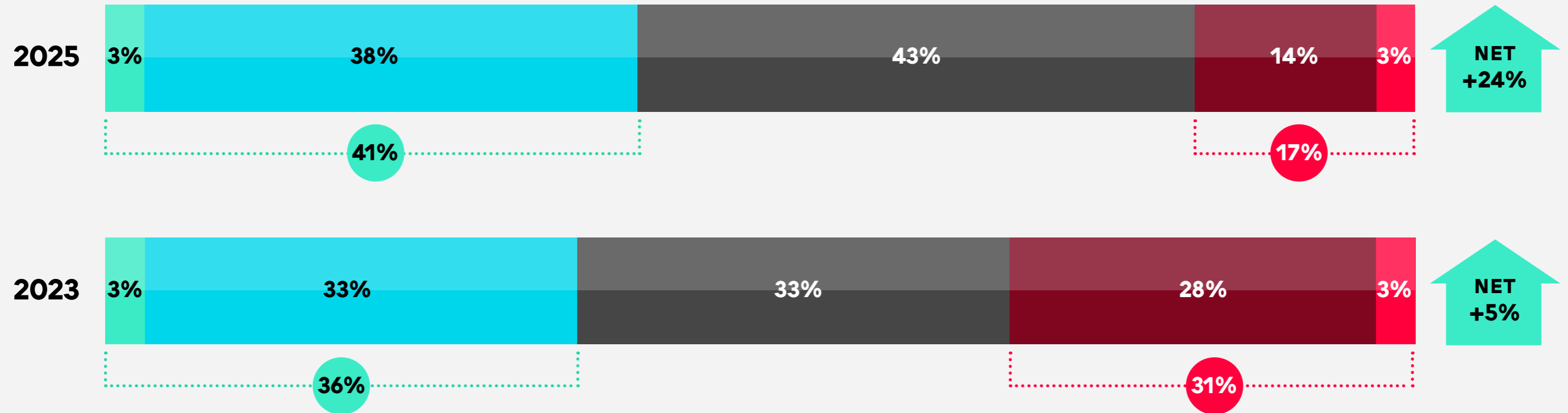
Sponsorship investment

Respondents anticipate a significantly more positive 2–3 year sponsorship budget horizon versus 2023

Over 40% expect stable budgets and no dramatic shifts over the next 2-3 years, while those anticipating declines have fallen to about half of 2023 levels.

Q. In the next 2-3 years, are you expecting an increase, decrease, or no change in your sponsorship budget (including rights fees and activation spend)?

Significant increase Some increase No change Some decrease Significant decrease



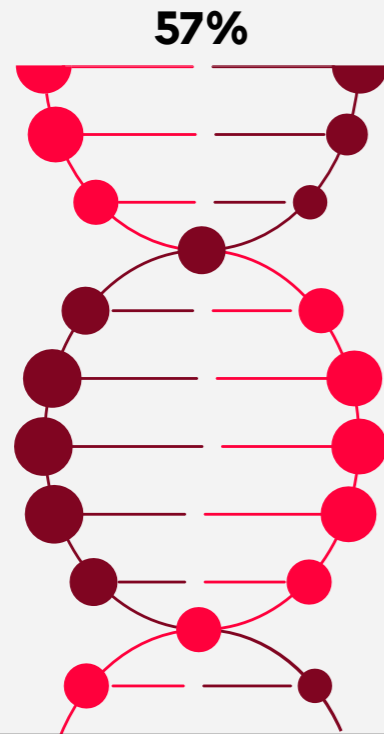
*NET Score = Sum of 'Significant Increase' + 'Some Increase' minus sum of 'Significant Decrease' + 'Some Decrease'.

Source: WFA & Lumency Online survey; Base: (n) = 37 Brand Owners (2025), 34 Brand Owners (2023)

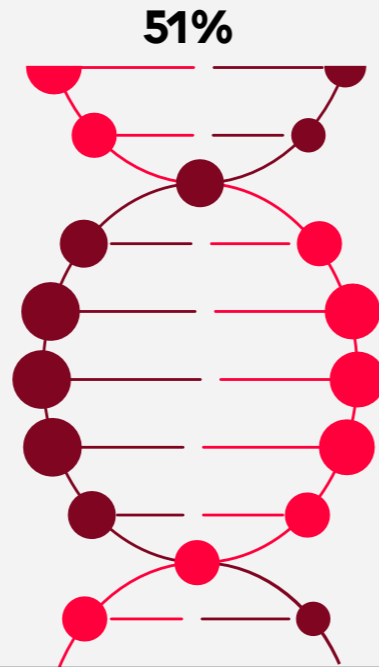
Sponsorship investment

Budgets are governed through shared global–local control

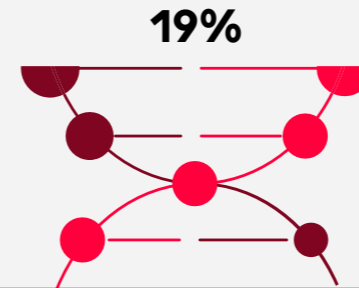
Q. How are sponsorship budgets generally administered?



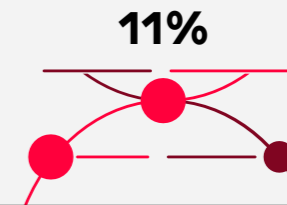
Local
(per individual market)



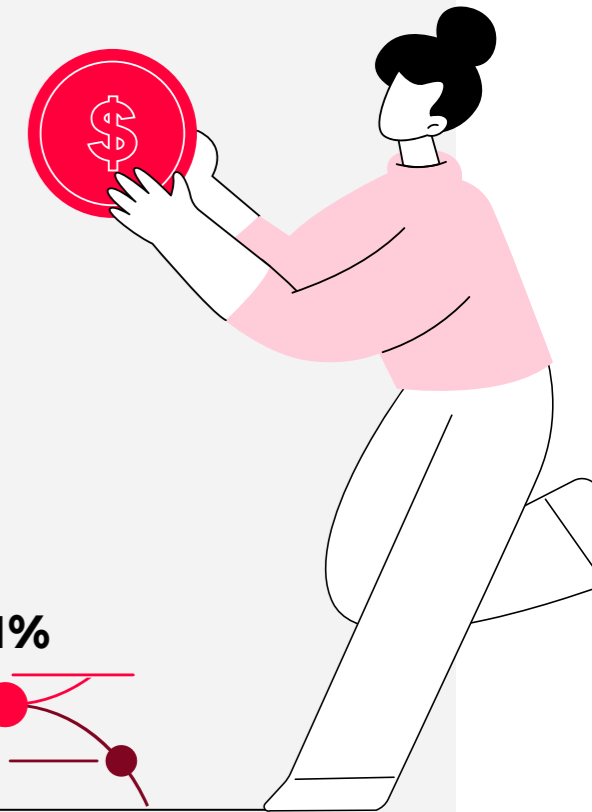
Centrally
from a global budget
led by central teams



Regionally
i.e., a budget used for
two–five countries only



Other*



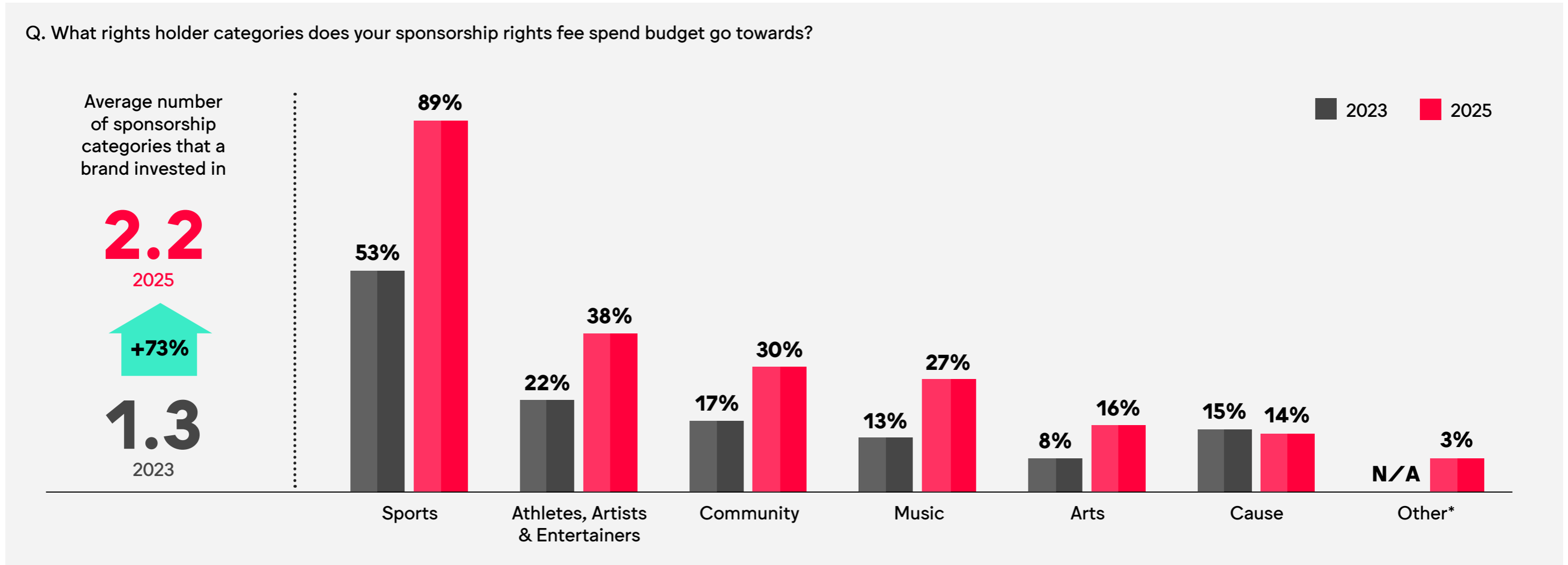
*Other: Includes 'Combination of Global and Local' and 'Depending on Sponsorship Fee'.

Source: WFA & Lumency Online survey; Base: (n) = 37 Brand Owners

Category investment

Brand owners are diversifying investment across sports, culture, and community platforms

Diversification across all categories as brand investment in Music and Arts doubled 2025 over 2023, signaling stronger alignment with cultural platforms.



*Other: Includes 'Beauty, Education and Chefs'.

Source: WFA & Lumency Online survey; Base: (n) = 37 Brand Owners (2025), 34 Brand Owners (2023)

Activation investment

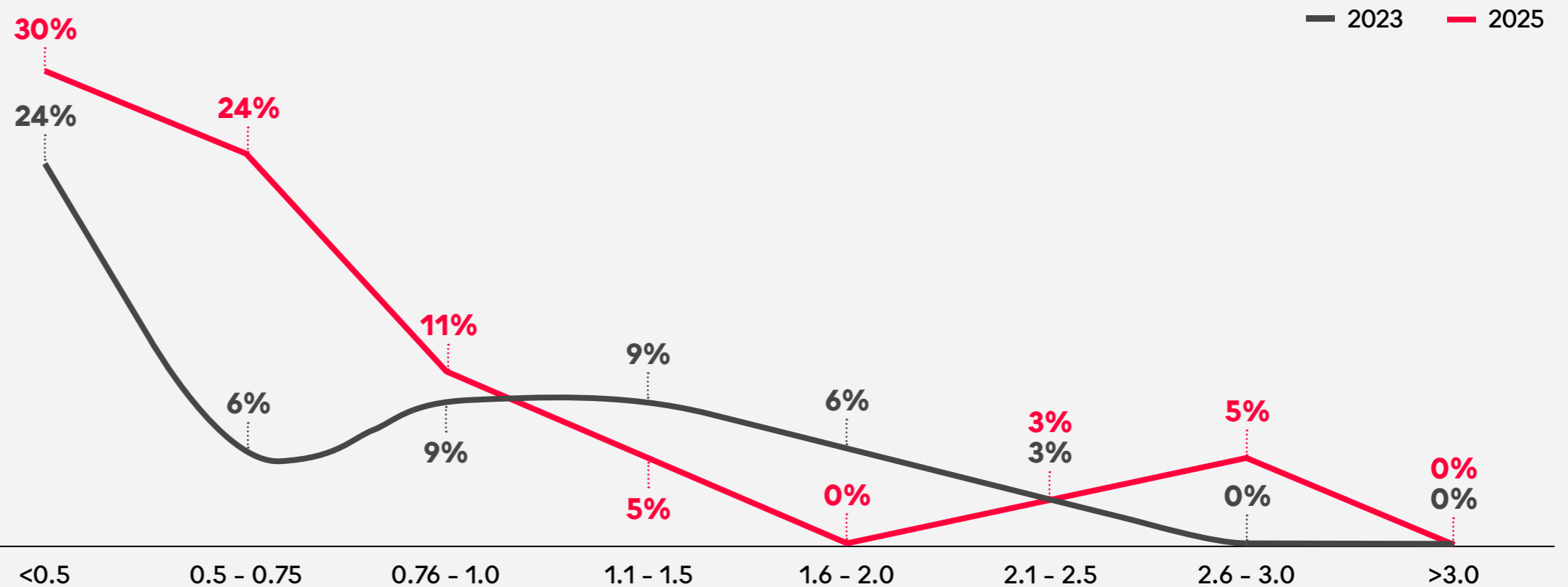
Survey responses suggest that activation efficiency is improving as tracking discipline strengthens

Q. Across your sponsorship portfolio, for every €1 (or \$ / ¥ / £) you spend to buy sponsorship rights, approximately how much extra do you usually spend to promote or activate that sponsorship?

Brands that don't know how much they spend to promote/activate

22%
2025

41%
2023

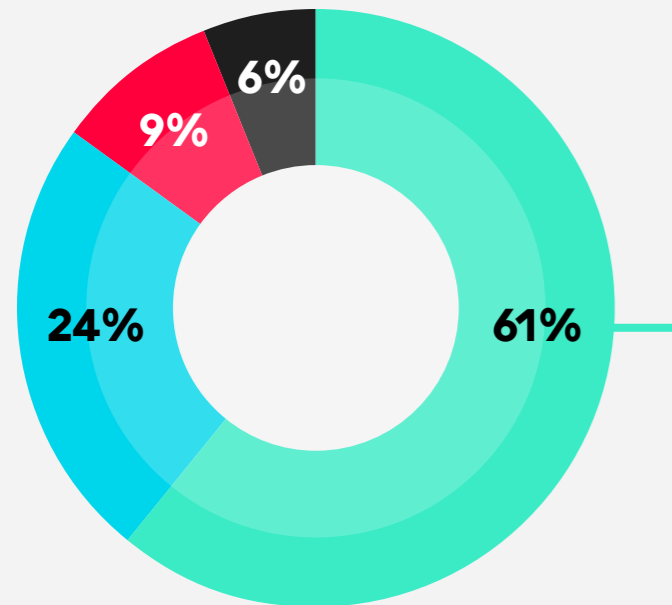


*Weighted average assuming normal distribution within % ranges.

Source: WFA & Lumency Online survey; Base: (n) = 37 Brand Owners (2025), 34 Brand Owners (2023)

Sponsorship strategy approaches are largely varied and fragmented: some brand-led, others passion point or ROI-driven

Q. Does your organisation have a specific sponsorship strategy that guides which sponsorship properties you source, renew or divest?



- Yes
- No, not yet but working on it
- No, and not planning to have one anytime soon
- Don't know

15% ROI-Based Evaluation Approach with Agency Support*

“We have a performance-based model and ROI policy by which teams have to check the performance of the deals to make informed decisions. We use agencies to support on this too.”

“Yes. Our sponsorship approach is based on the brand platform of “Excitement with High-Voltage Emotions.” We seek partners who excite consumers, ignite their imagination, and reinforce the impact of our brand as a cultural author. We procure properties driven by innovation, passion, and performance — with a focus on immersive, multi-platform activation opportunities. Renewals are powered by performance KPIs such as brand love, digital reach, lead generation, and ROI. We disinvest once sponsorships no longer provide emotional impact or strategic fit.”

“We work with an agency to evaluate sponsorship options and sizing.”

30% Brand Metrics Led*

“Part is directed by strategic marketing direction, taking cues from brand health trackers, audience studies, etc. Part by other drivers.”

“Every brand has its own individual strategy. The Group has an overview of these and there is a central strategy that ensures brand differentiation.”

“Driving brand awareness against specific target audiences, driving specific business outcomes.”

“Depends on the brand equity ambitions, fit w/ brand strategy and the impact sponsorships brings.”

“Masterbrand strategy - to help us build our distinctive strengths around technology and partnership.”

15% Anchored to Sport*

“We have a defined sponsorship strategy focused on sports and have established key criteria when reviewing new sponsorship opportunities.”

“Not aware of a specific strategy logic, but the target is sport.”

“Highly sports focused, this links with our brands and target audiences.”

15% Global Strategy, Local Implementation*

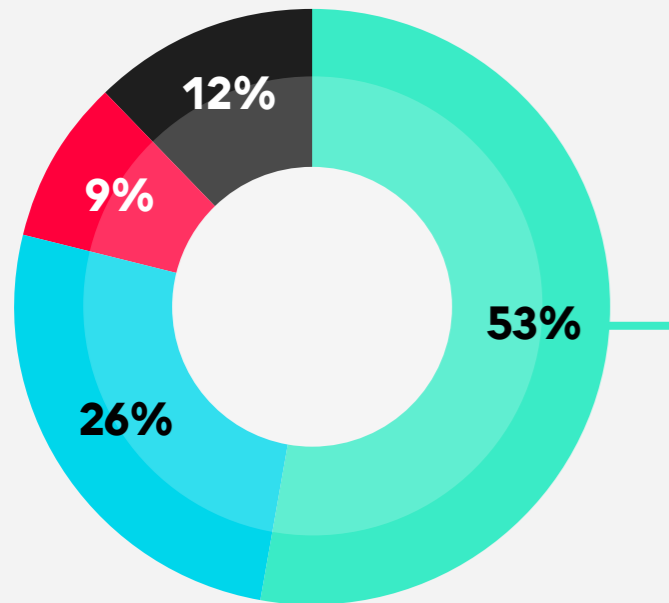
“Globally aligned around sports, culture, innovation. Each market to source and activate within one or more categories that is relevant to the market.”

“Sponsorships are aligned to our commercial and corporate strategy.”

Source: WFA & Lumency Online survey; Base: (n) = 33 Brand Owners. *Sub-Net of Yes %

Sponsorship management structures differ widely, from global oversight models to evaluation-led and framework-driven approaches

Q. Does your organization have a formal sponsorship governance model or a full set of standard operating procedures for sponsorship?



- Yes
- No, not yet but working on it
- No, and not planning to have one anytime soon
- Don't know

30% Global Governance with Local Implementation*

- “Global Governance with local implementation”
- “Locally determined opportunities are to be reviewed and aligned on with senior leadership locally and regionally at a minimum. Depending on scope (dollars), globally also.”
- “Local sponsorships need to comply with a set of 5 broad rules linked to Brand fit. Approval is Global.”
- “There is a process approved globally every sponsorship above [above a certain spend level].”
- “The governance model is at a company-wide level managed by Marketing with increasing levels of approval based on the amount of spend.”
- “Yes. We have a global sponsorship policy that’s managed centrally by my team. Each business unit is required to formally submit all sponsorship requests that exceed a specific financial threshold for review and approval. This ensures alignment with our global strategy and maintains visibility of sponsorship spend and best practices.”

25% Measurement and Evaluation Led*

- “We have an assessment tool to see whether a property is a good fit — removes subjectivity. And we have a forum with board members to make decisions.”
- “We rolled out a new measurement approach, and deliver a scorecard against KPIs twice/year.”
- “ROI tracking, customer engagement tracking, earned media.”
- “ROI focus, process to ensure central approval for all activities.”
- “Yes, in terms of measurement, activation, amplification, etc.”

20% Somewhat Defined Framework*

- “Clear set of processes and procedures with a strategy and governance framework in place.”
- “It starts with a business case, followed by getting the right financials, approvals (which includes business & procurement) and a follow-up of the deal to understand the results.”

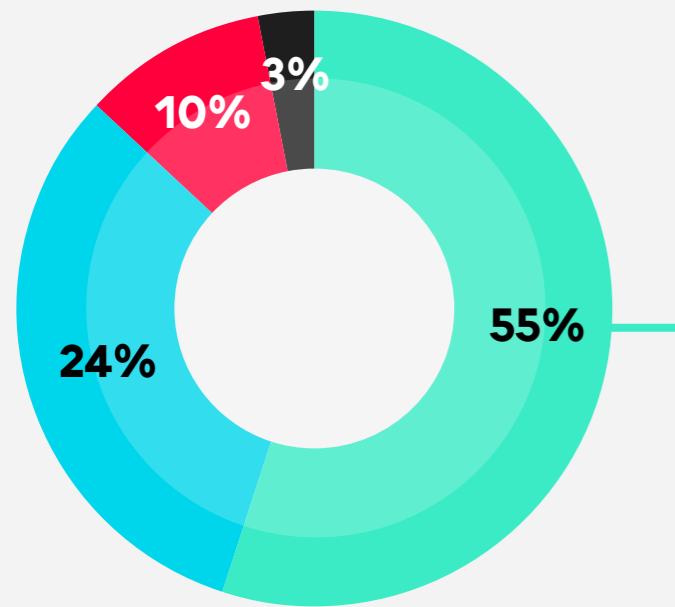
10% Dedicated Team / Agency Led*

- “People fully allocated to sponsorship that has direct links to brand strategies.”
- “We hire an agency to create the governance.”

Source: WFA & Lumency Online survey; Base: (n) = 33 Brand Owners. *Sub-Net of Yes %

Rights valuation frameworks are primarily media valuation led with some relying on benchmarking versus previous deals

Q. Do you use a model or framework to determine the commercial value of the rights and entitlements you are securing with your sponsorships?



- Yes
- No, not yet but working on it
- No, and not planning to have one anytime soon
- Don't know

40% Media Valuation Led*

“equivalent media evaluation conducted by Agency of Record.”

“Weighted media valuation based on brand exposure.”

“Currently working with a media equivalence approach.”

“Media value and value of all other aspects.”

“Yes, we define this through ROI modeling as well as media value.”

“Media value.”

“Yes, we evaluate leveraging industry valuation tools or agency support to determine the commercial value of the rights and entitlements we are securing with our sponsorships. We also have an internal framework that guides our negotiations, ensuring we align the value of the sponsorship with our business objectives and target audience.”

15% Not Sure / Different team or agency handles*

“I’m not too sure of the details - the sponsorship handle that.”

“We hired (external agency).”

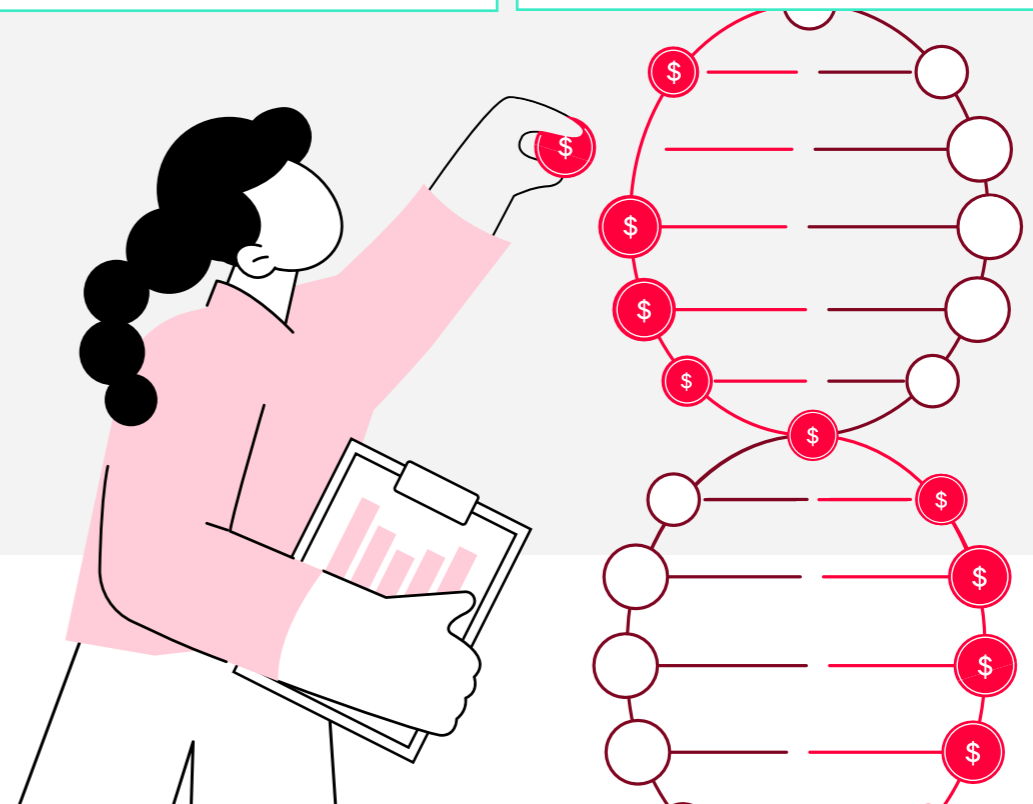
“We work with an agency for selection. ongoing measurement is performed internally by the team responsible for all marketing effectiveness.”

15% Benchmarking*

“Benchmarking.”

“Yes, based on our own benchmarks as we have been buying sponsorship as a business for a long time.”

“We use independent data tools to benchmark rights value to help negotiate rights and fee coupled with specialist expertise.”

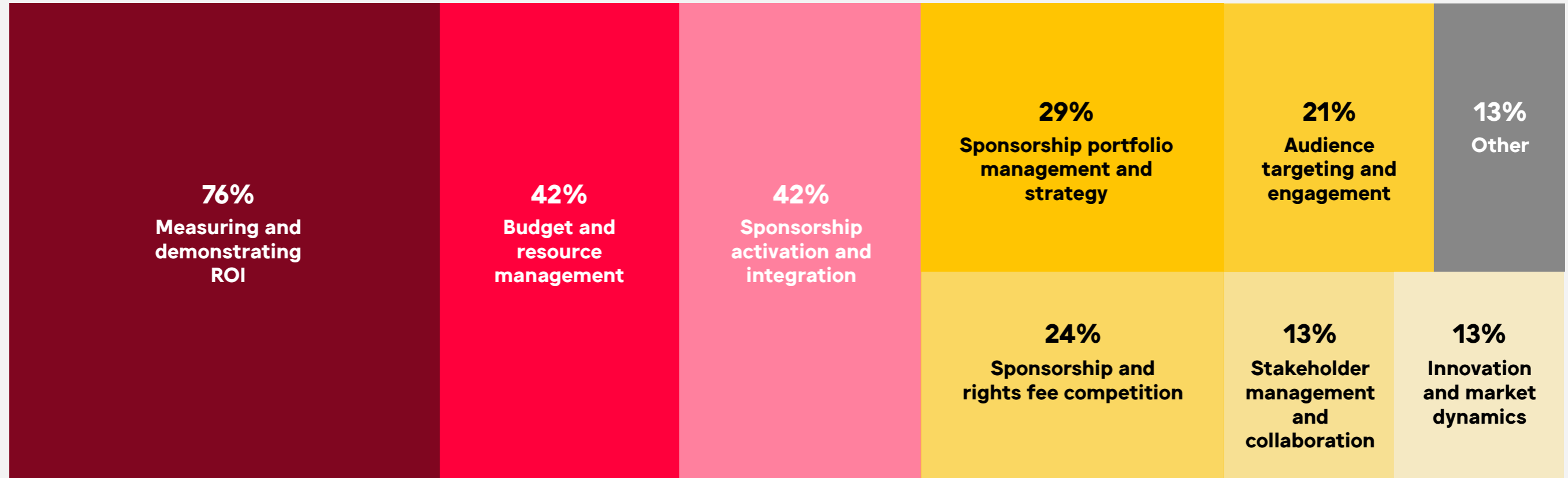


Source: WFA & Lumency Online survey; Base: (n) = 33 Brand Owners. *Sub-Net of Yes %

Challenges

Measuring and demonstrating ROI remains the biggest challenge followed by sponsorship activation/integration and budget

Q. What are the top three challenges your organisation is facing around its sponsorship activity?

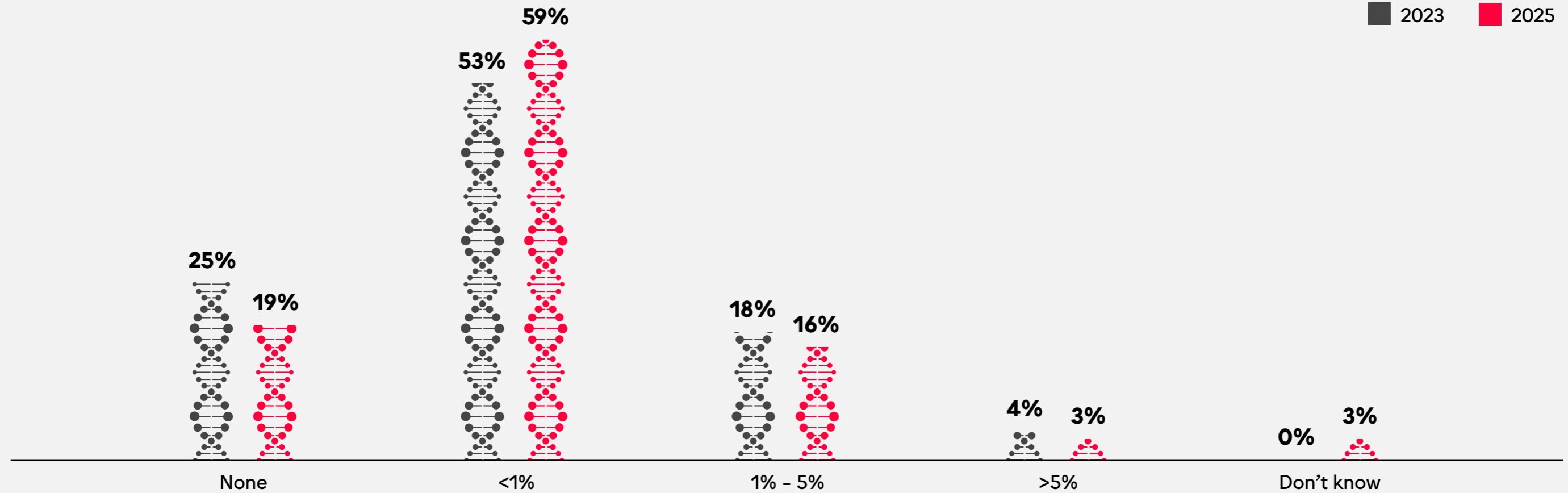


*Note: Other challenge cited was 'Regulated industry restrictions, sponsor fragmentation & category inflation, network engagement & amplification'. Source: WFA & Lumency Online survey; Base: (n) = 38 Brand Owners

Measurement

Most respondents still invest less than 1% of budgets in measuring sponsorship impact but zero-spend cases are declining

Q. What percentage of your sponsorship budget is spent on measuring return?

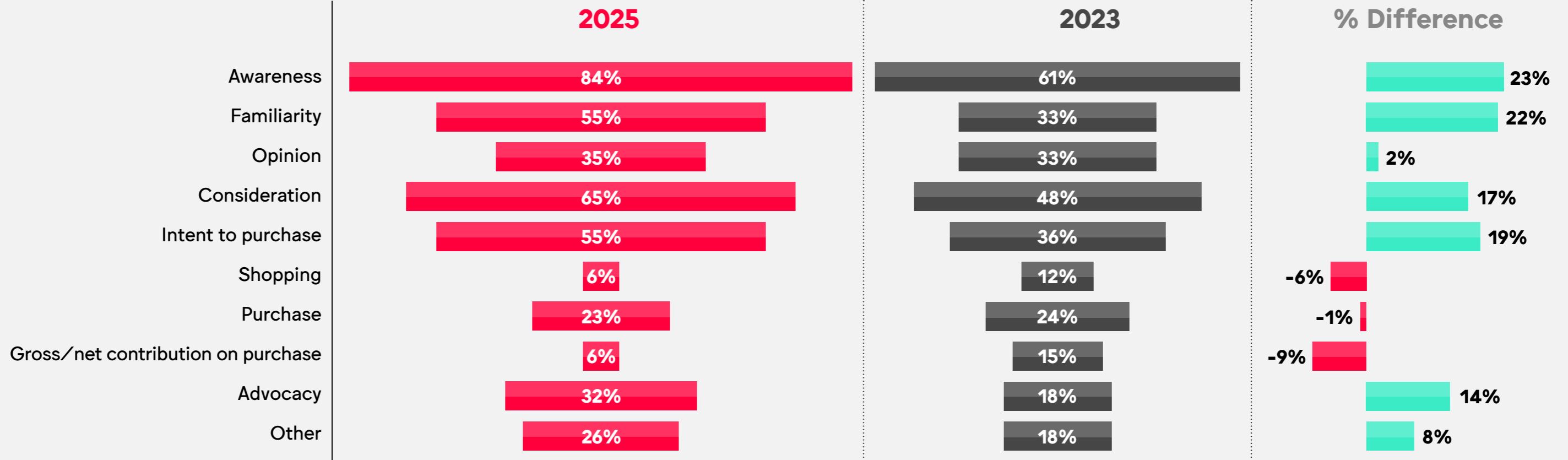


Source: WFA & Lumency Online survey; Base: (n) = 32 Brand Owners

Measurement

Top Funnel metrics continue to be the core focus: stronger emphasis on Awareness, Familiarity, Consideration, Purchase Intent and Advocacy

Q. How does your organization measure its sponsorship's impact on commercial and brand objectives?



*Other: 'Reach, image attributes influenced by the engagement, Quantifying business gained/retained, Lead generation, Contribution to Brand Power, Brand Association w/ given event (world cup) or territory (eg. football)', NPS and ENPS' 'Incremental TO' and 'Brand Image'. Source: WFA & Lumency Online survey; Base: (n) = 31 Brand Owners

Recommendations to consider

Sponsorship growth demands strategy, structure, and stronger measurement discipline

● Invest with purpose

- Consider anchoring rights fees and activation budgets to clear business objectives, with consistent evaluation frameworks guiding prioritization and renewal.

● Optimise activation efficiency

- Consider balancing spend between rights and activation to maximize return; standardising tracking to identify best-performing tactics.

● Consider broadening the cultural mix

- You may benefit from evolving beyond sport-led portfolios to build cultural relevance and connect authentically with Gen Z and Gen Alpha.

● Advance governance and measurement

- Adopt consistent frameworks that link sponsorship performance to business outcomes.
- You may benefit from shifting from <1% measurement investment toward a 3% benchmark to elevate accountability.



Recommendations to consider

As sponsorship practices mature, the advantage shifts from governance to capability and insight

● Operationalize governance into repeatable systems

- Codify processes and tools that make sponsorship evaluation consistent across markets and categories.
- Ensure governance frameworks enable agility, not bureaucracy.

● Create a performance and insight culture

- Treat sponsorship as a managed marketing system, linking brand, media, and research functions.
- Use sponsorship data to inform portfolio strategy, resource allocation, and renewal decisions.

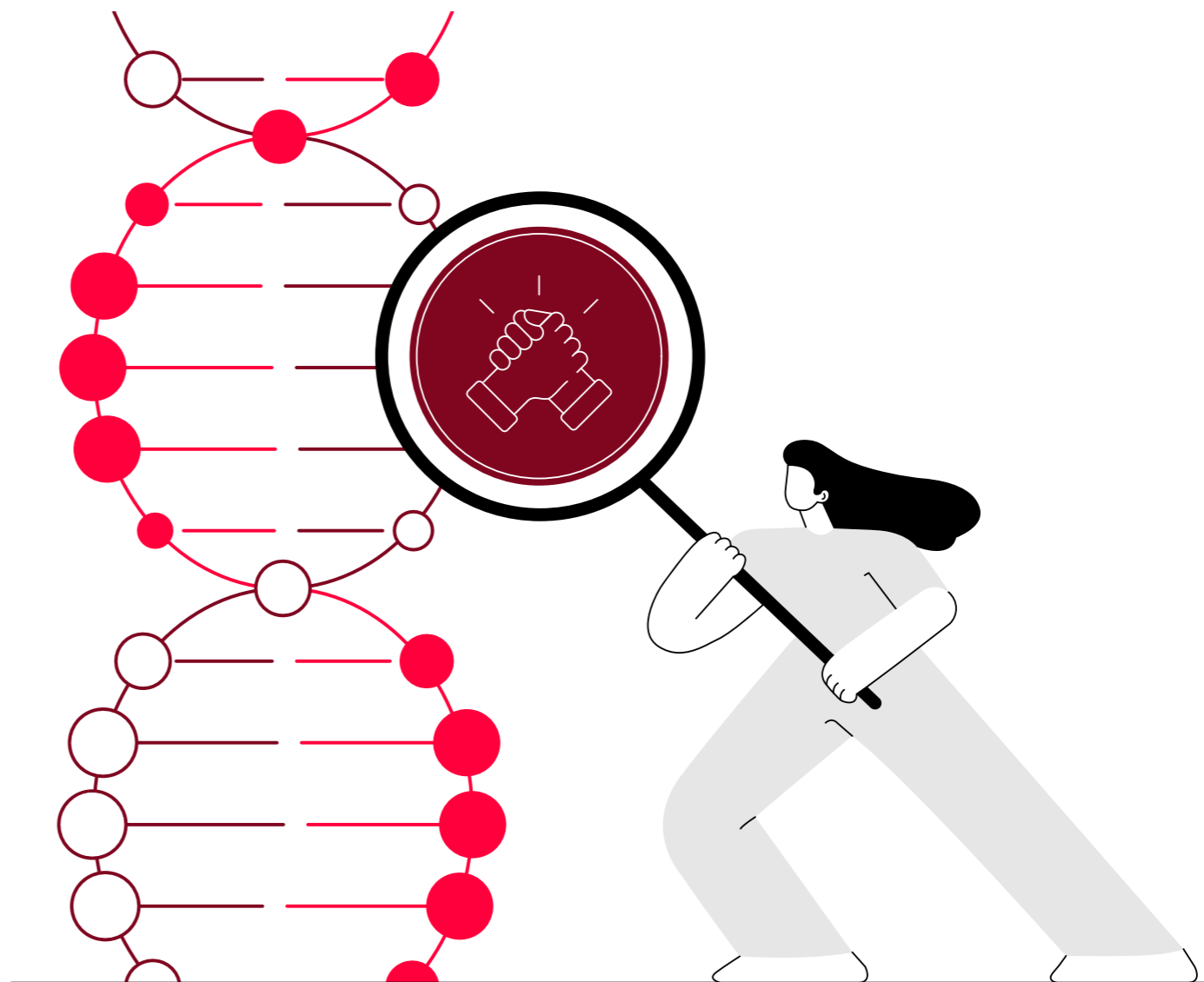
● Consider building measurement as a core capability

- You may benefit from integrating data and analytics teams into sponsorship planning and post-evaluation cycles.
- Industry research suggests that allocating ~3 % of total sponsorship budget can help ensuring data quality, benchmarking, and decision confidence.



Brand-to-Brand Partnerships

Note: Sample drops to 15 Brand Owners. Use indicatively

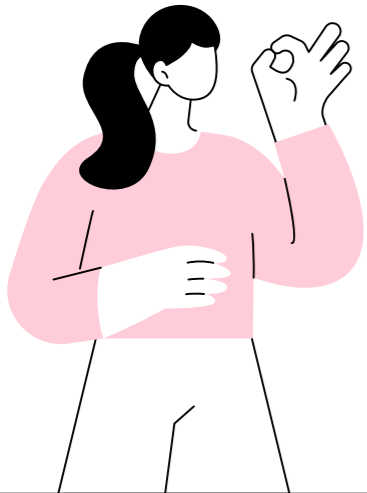


Executive summary

Brand-to-brand partnerships are gaining traction, though partner identification and measurement remain key hurdles

Nearly half of all participating Brand Owners engaged in brand-to-brand partnerships to advance their marketing objectives.

- Collaborations are geographically diverse, with a slight skew toward local partnerships, signaling a focus on market-level relevance and shared audiences.



Activation formats are varied and evolving.

- Partnership approaches range widely, most commonly through co-op/joint initiatives, event collaborations, content creation, and cross-promotions.
- Partnerships include multiple layers of collaboration from financial commitments and joint marketing plans to shared media.

Challenges and accountability frameworks are still developing.

- Identifying the right brand partners is the biggest challenge, followed closely by measuring the impact of those partnerships.
- Accountability skews more toward performance metrics compared to sponsorships, though brand impact and long-term equity remain the top priorities.

Success is defined by visibility and value.

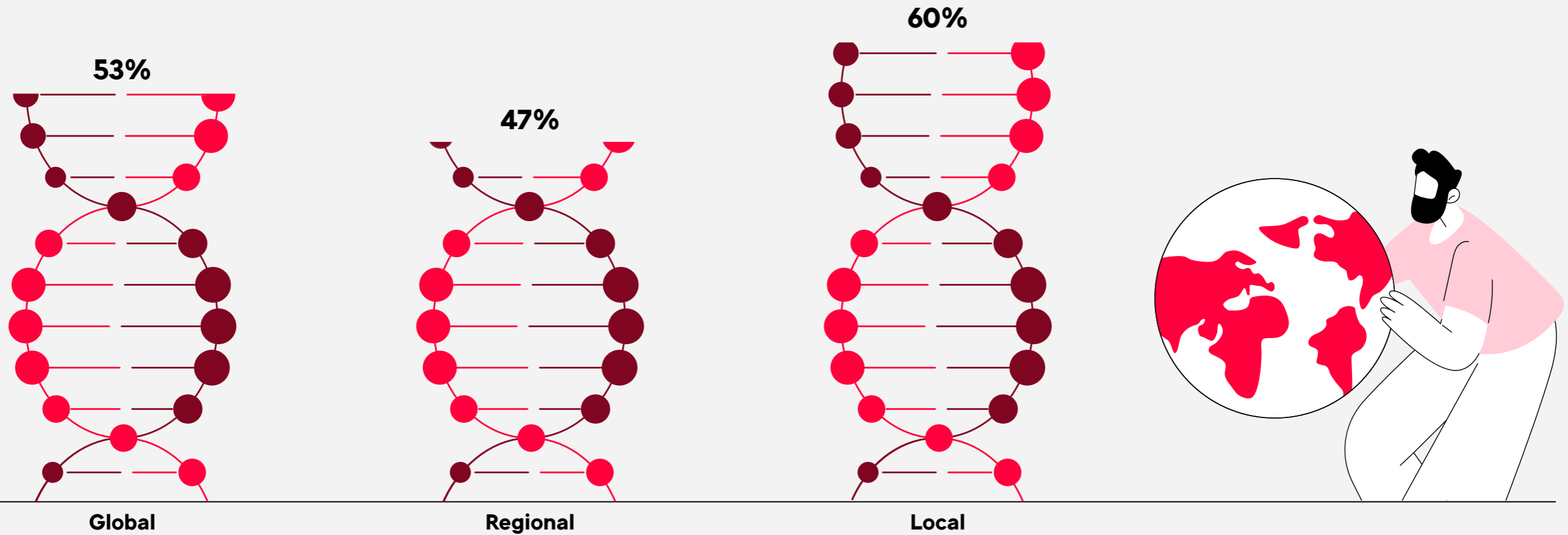
- Raising brand awareness stands out as the primary KPI, closely followed by ROI, underscoring a balance between exposure and measurable commercial outcomes.



Scope

Partnerships were fairly evenly split by geographic scope, with a slight skew toward local collaborations

Q. What was the geographic scope of that partnership with other brands relating to your marketing and/or media activity?

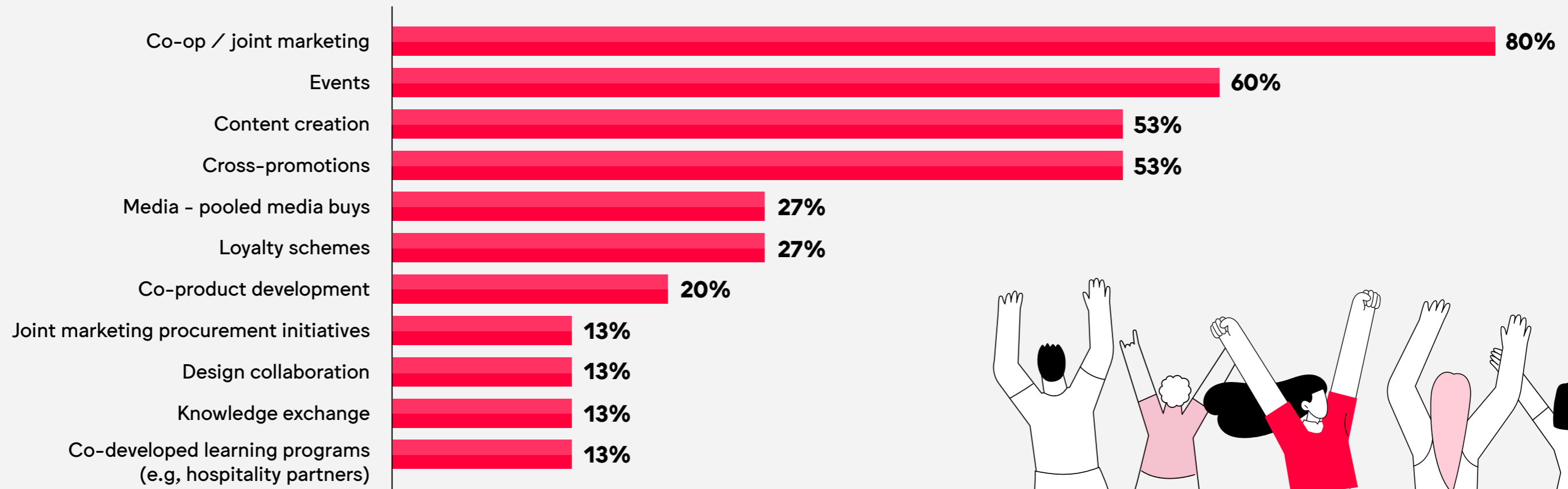


Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

Scope

Approaches to brand-to-brand partnerships vary widely, most commonly joint marketing (co-op) initiatives, followed by event collaborations and content creation or cross-promotions

Q. How were your brand-to-brand partnerships executed and brought to life?

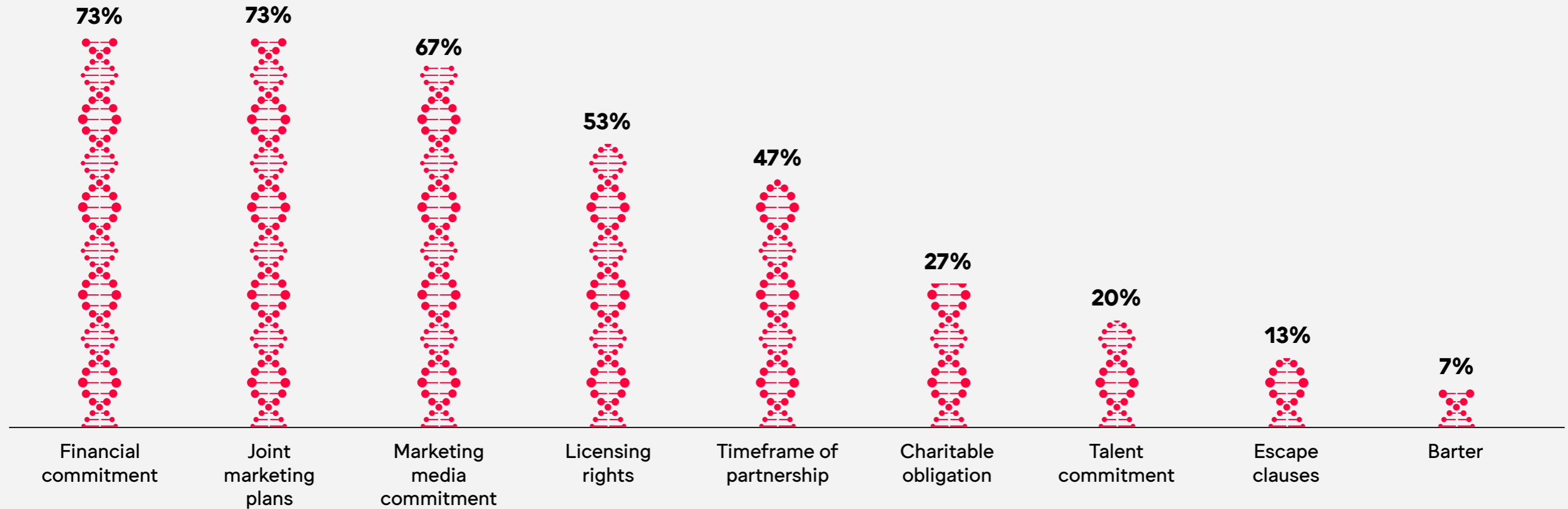


Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

Scope

Brand partnerships often encompassed multiple elements: most notably financial commitments, joint marketing plans, and shared media investments

Q. Which of the following aspects were included within your brand-to-brand partnerships? Please select all that apply.

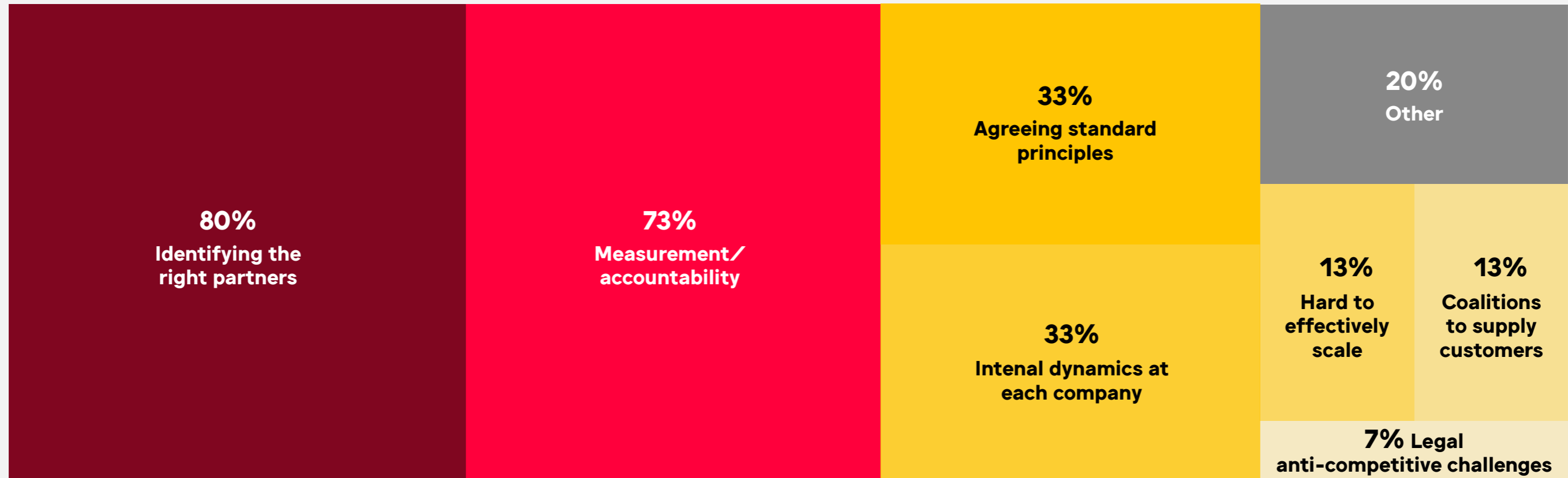


Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

Challenges

Identifying the right brand partners is the biggest challenge, followed closely by measuring partnership impact

Q. What would you say are your challenges in terms of brand-to-brand partnerships? Please select all that apply.

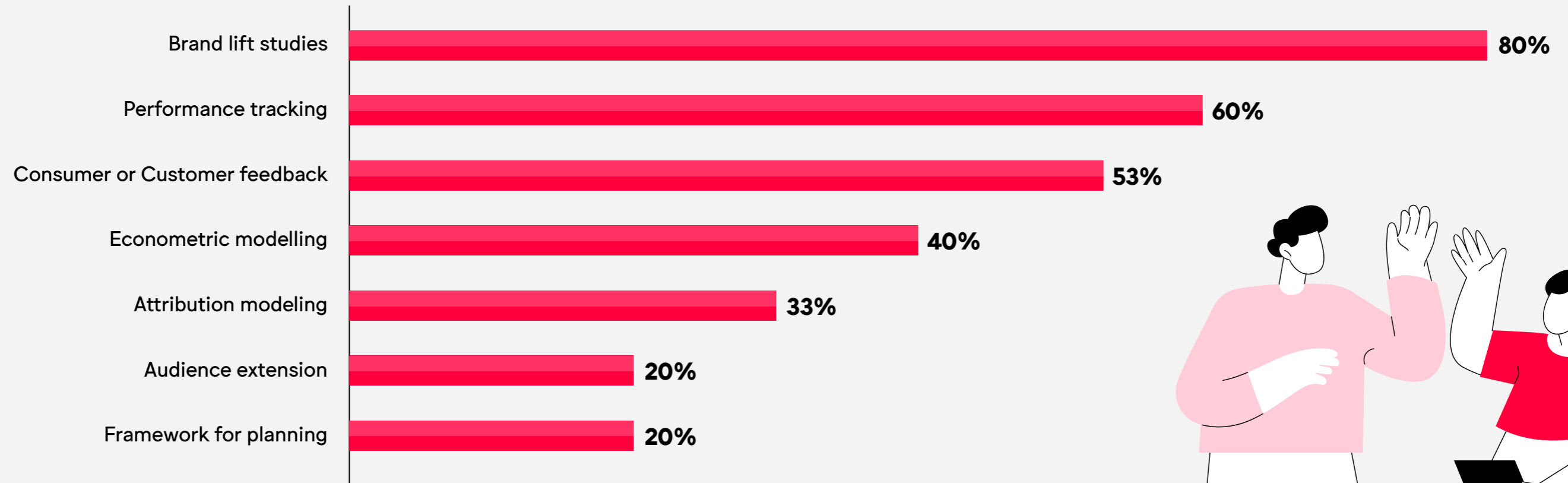


*Other: 'sell-in the program to our customers' and 'complex ways of working'. Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

Measurement

Accountability in partnerships leans more toward performance metrics than in sponsorship agreements, though brand impact remains the top priority

Q. Which of the following do you use to measure the value of your partnerships? Please select all that apply.

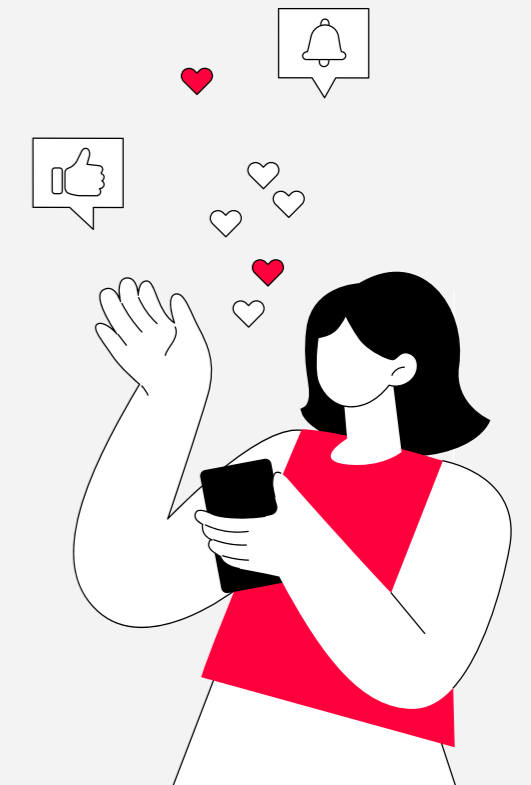
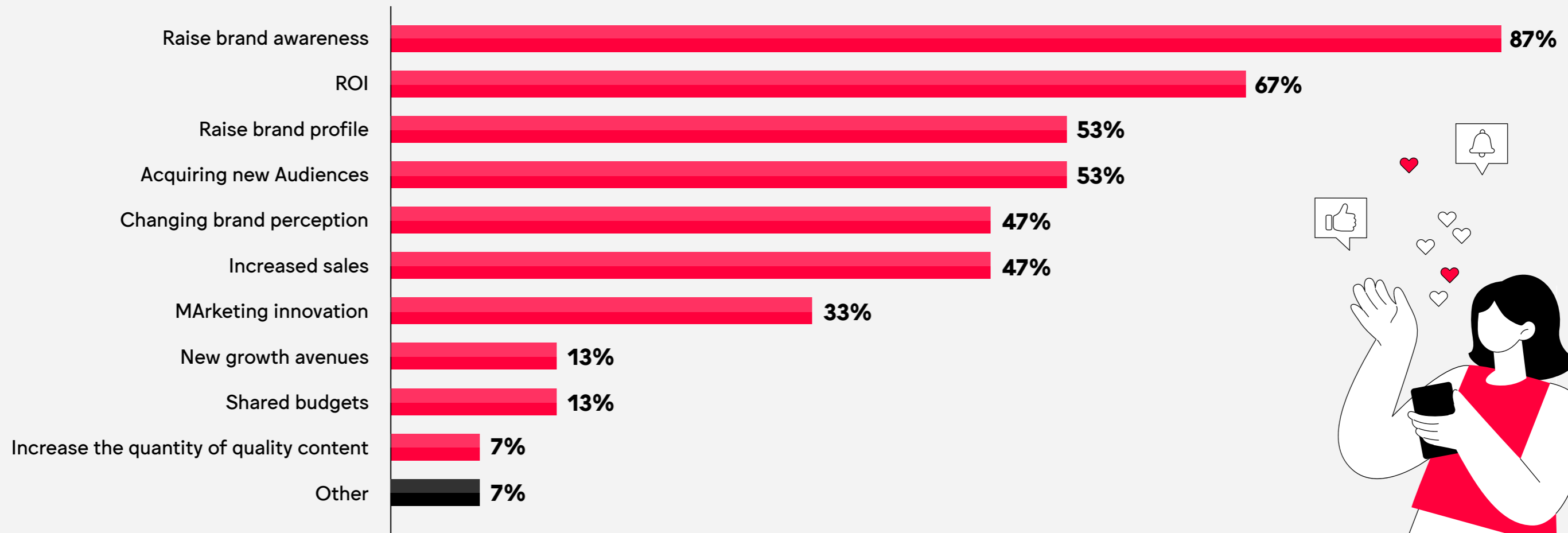


Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

Measurement

Raising brand awareness is a standout KPI followed by ROI

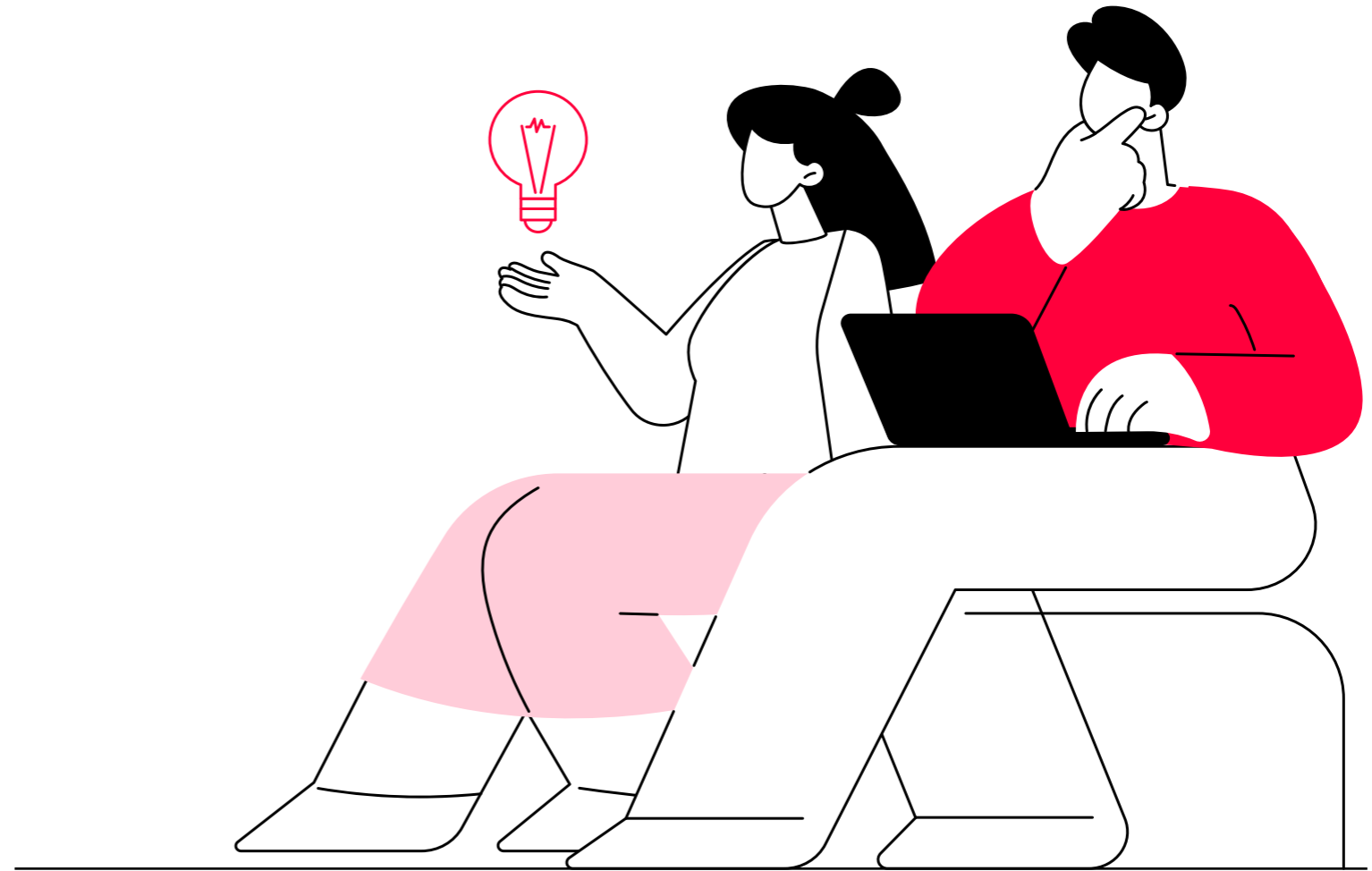
Q. What were the main goals or KPIs of the partnership(s) you have put in place? Please select all that apply.



*Other: 'Social Impact'.

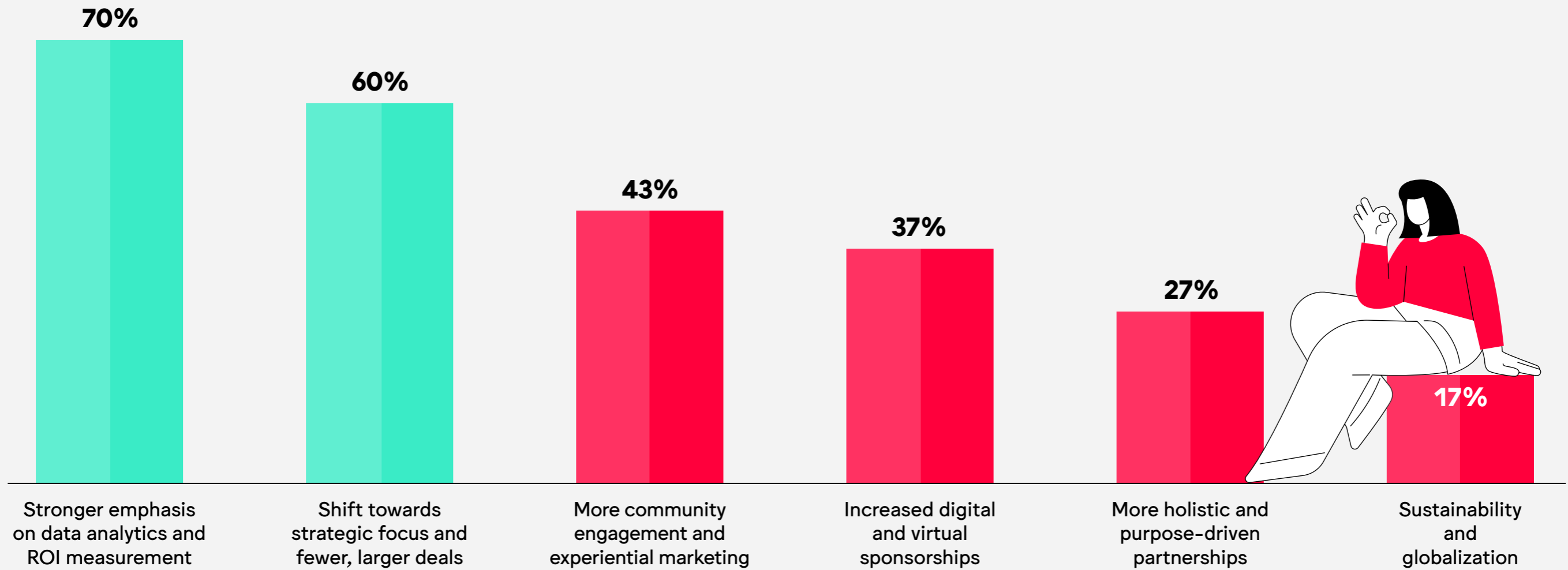
Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

What's next?



A rational future: fewer, bigger and more accountable!

Q. How do you see your sponsorship and partnership initiatives evolving/changing in the next three to five years? Please select a maximum of three.



Source: WFA & Lumency Online survey; Base: (n) = 15 Brand Owners

How to connect



About WFA

WFA is the only global network for senior marketers. Our goal is to make marketing better by championing more effective and sustainable marketing communications. We are a global association that represents over 150 of the world's biggest brands and more than 60 national advertiser associations worldwide.

Together, they create a peer-to-peer network of the world's best marketers, offering a unique source of expertise, inspiration and leadership. We help you by connecting you to their collective wisdom, so you can take leadership positions.

More information at: www.wfanet.org

Contact: Rob Dreblow r.dreblow@wfanet.org



About Lumency

Lumency is a sponsorship consultancy working across 21 country markets, focused exclusively on supporting brand owners. Established in 1996, Lumency brings a scientific, data-driven and insights-led approach to sponsorship strategy, governance, property evaluation, activation design, and measurement. By working only with advertisers and never with properties or rights holders, our perspective is unbiased and fully aligned to brand and commercial objectives. We immerse in each organisation's business to understand priorities, pressures, and market context, which enables us to deliver evidence-based recommendations that support smarter sponsorship investment and decision-making. Lumency has been a WFA Strategic Partner since 2022.

More information at: lumency.co

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[youtube.com/wfamarketers](https://www.youtube.com/wfamarketers)

WFA Competition law compliance policy

The purpose of the WFA is to represent the interests of advertisers and to act as a forum for legitimate contacts between members of the advertising industry. It is the policy of the WFA that it will not be used by any company, or individual, to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition. The WFA carries out regular checks to make sure that this policy is being strictly adhered to.

As a condition of membership, members of the WFA acknowledge that their membership of the WFA is subject to competition law rules and they agree to comply fully with those laws. Members agree that they will not use the WFA directly or indirectly, (a) to reach or attempt to reach agreements or understandings with one or more of their competitors, (b) to obtain or attempt to obtain, or exchange or attempt to exchange, confidential or proprietary information regarding any other company other than in the context of a bona fide business or (c) to further any anti-competitive or collusive conduct, or (d) to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition.