



2
0
2
4

KORE PRESENTS

State of the Industry 2024

Leading Sports Partnership Trends and Insights

A Data-Driven Annual Review of Global Sport Sponsorship Insider Intel, and Trends & Spend Across the Big Five 2023/24 Seasons.



Topics Overview

1. Introduction - About KORE, Global Footprint, What was Analyzed
2. KORE Perspective & Recap of 2023 by the Numbers
3. Survey - Brands & Rights Holder Perspective
4. Breaking Down Spend Data
5. Focus Product on Women
6. Social Deep Dive
7. Top Content
8. Audience, Fan Engagement, Post Analysis
9. Conclusion and Key Takeaways
10. Bonus Content – Post Analysis





Introduction

KORE stands at the forefront of a transformative era in sponsorships, harnessing a synergy of data and partnership insights that propels the industry forward. Reflecting on the momentum gained through 2023—marked by KORE's strategic acquisitions and an expansion beyond our software origins—our trajectory has been nothing short of groundbreaking.

Last year, we initiated a pivotal dialogue on the power of sponsorship growth, pointing to predictions of an industry on the verge of surpassing \$116B in spend by 2027. This year, we continue to validate that foresight with concrete data: the unmistakable value and growth trajectory illuminated by our data points, analytics, industry surveys and insights.

Our findings spotlight a vital need—alignment is the key. While 70% of rights holders try to pinpoint their brand partner's goals, an overwhelming 81% acknowledge the imperative of aligned goals, values, and strategic fit with their partners. Conversely, brands agree, emphasizing the necessity of goal congruence, brand resonance, and cost-effectiveness in partnerships. Yet, a disconnect lingers—63% of brands perceive a gap in understanding from the rights holders' side regarding their objectives.

Terms to Understand

As you review this report.

Brands: As buyers in the sponsorship relationship, brands are companies or organizations that invest in partnership opportunities with sports teams, events, athletes or influencers to achieve marketing objectives like increasing brand awareness, enhancing brand image, and driving sales.

Rights Holders: The sellers, rights holders are entities that own the marketing rights to a sports team, event, or athlete, including sports organizations, event organizers, or individual athletes.

As sellers in the sponsorship relationship, they offer brands the opportunity to associate with their property in exchange for financial or other forms of support.



Creating More Powerful Partnerships for +22 years.

200

Experts passionate about partnerships, data, and results

500K

Brand, team, league, event, venue, and athlete accounts tracked

\$5B

Global sponsorship transactions managed YOY

\$12.4B

Annual social sponsorship value measured

Working with 900+ of the world's most valuable brands, properties and agencies.





Sponsorship Synergy: Uniting Data, Goals & Vision

KORE'S global footprint brings it together.

With the largest sports and entertainment data pool and access to near-time insights through our industry leading sponsorship platform, KORE is paving the path to support the sponsorship tech industry's rapid growth.

Our unified data empowers brands and rights holders to forge and elevate partnerships with a shared vision and measurable success.



Spend Tracked

- In our Sponsorship Spend Data
- Not in our Sponsorship Spend Data

Fan Connections

32B

Sport Graph

500k+ Entities
3B Social Posts

One Holistic Solution

To partner better, together.

End-to-End Solution

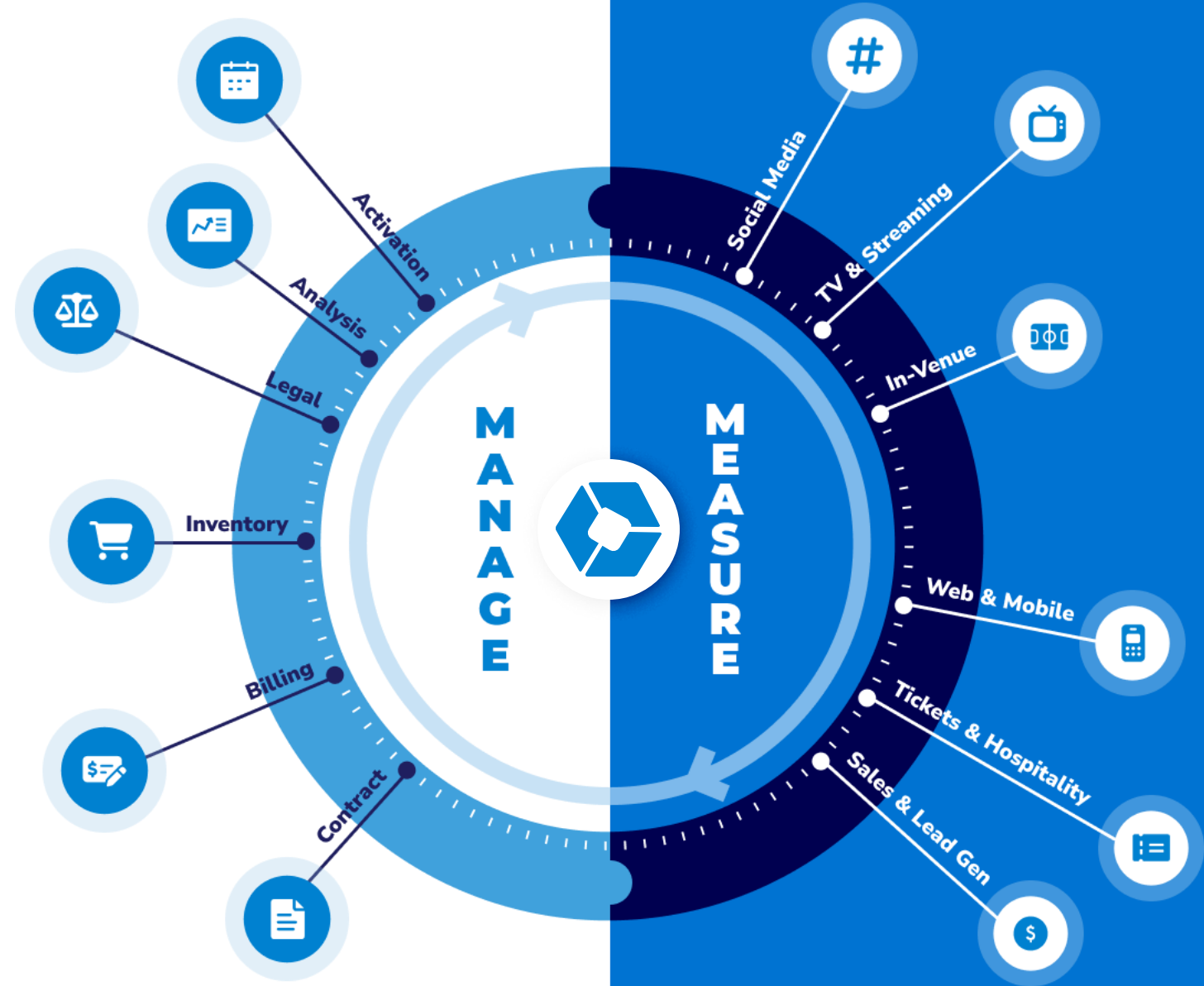
Single solution to handle the full partnership lifecycle from inventory management, contracting, and financial controls through to activation and evaluation.

ONE Platform, ONE Partner

Seamless experience for the full partnership operations through a single platform with a single team to support you.

Integrates Seamlessly

Built to fit alongside any existing tech stack and data providers with capabilities to extend to fit your unique needs.





The Data Powering the Insights

56K Sponsorship Deals

From 1K+ Brands & Rights Holders

- ✔ Sponsorship assets
- ✔ Revenue, spending
- ✔ Partnership objectives

Aggregated, anonymized & opt-in deal data from the world's most recognizable rights holders, agencies and brands.

19M Social Posts & Trends

From 150K+ Sports Entities in 2023

- ✔ Engagement, viewership
- ✔ Brand exposure & valuation
- ✔ Follower trends & audience data

The KORE Sport & Entertainment Graph maps, aggregates and analyzes all social activity from over 500K accounts globally.

1.7K Industry Survey Answers

From 60+ Brands & Rights Holders

- ✔ Goals / Objectives
- ✔ Challenges
- ✔ Opportunities & Future Outlook

First of its kind 27 question industry survey from over 60 brands and rights holders in a variety of locations, sports and industries.



The Future of Partnerships is **Growth** Fueled by Partnership **Alignment**.

Year in Review: 2023



Social data from 2023-01-01 to 2024-01-01



Unlocking the Keys to Sustainable Partnership Growth

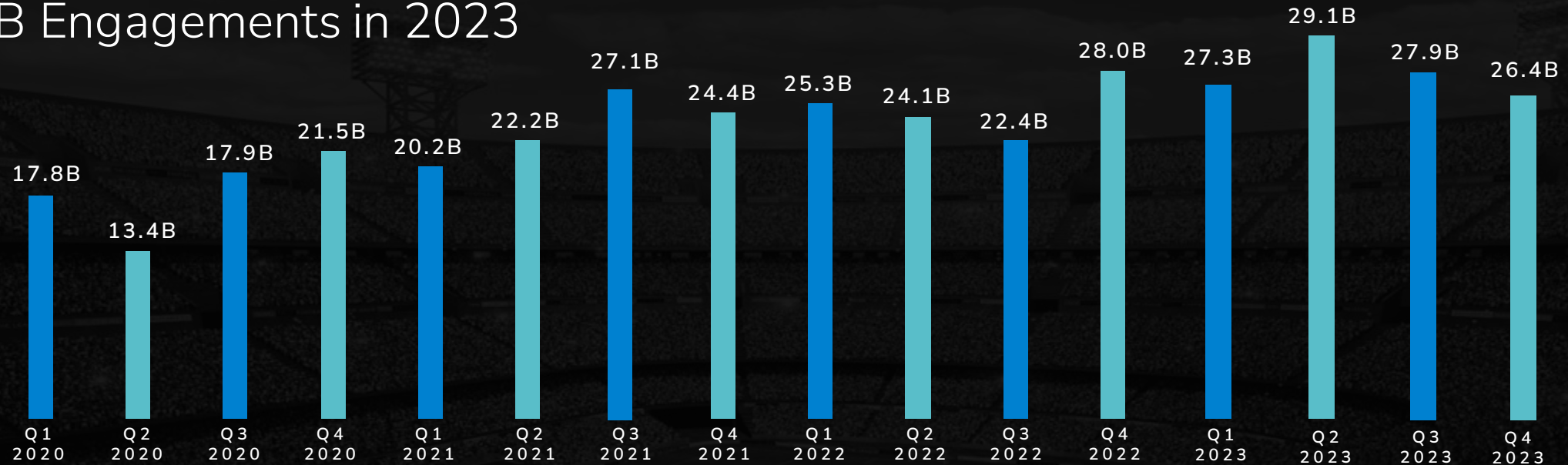
We recognize the strength of partnerships and the clear indicators of continuous growth in the industry. To harness this potential, nurturing genuine partner synergy in sponsorships is imperative. Currently, an alignment gap exists; rights holders and brands often feel misunderstood by their partners, highlighting a need for better [alignment](#).

As spending, engagements, and partnerships expand, the question arises: Are both sides truly in sync? How can the industry evolve to scale with the undeniable, future growth of partnerships while maintaining authentic fan connections? Let's review the data first.



Social Engagement is Part of Sport

111B Engagements in 2023



The spike in 2023's second quarter equates to 17% growth for that quarter, year-over-year. The top solitary drivers of this engagement growth are global football entities with Real Madrid (3.5%), UEFA Champions League (2.8%) and Manchester City (2.4%) accounting for half of this climb. We see a slight dip in the final quarter of 2023, which is more normalized compared to 2022's fourth quarter which was when the 2022 FIFA World Cup™ was held.

TREND: Video views grew 26% year-over-year, while the amount of posts fell 2.6%, this means, less posts and a more quality video content is in demand.



KORE Perspective: General Global Trends

Women's focus. Higher spend for higher valued partnerships.

54%

Of brands surveyed are targeting partnerships with women's sports

\$116B

Forecasted global spend by 2027

14%

Fewer deals despite increased spend

Consolidated partnerships continue to shape the future of brand marketing.

As we move into 2024, the trend of strategic, consolidated partnerships continues to define the sponsorship landscape. Brands are leveraging data and measurement tools to optimize their investments, focusing on partnerships that align with their core values, as evidenced by 80% of rights holders surveyed. The blend of local and national sponsorships, especially around NIL (Name, Image, Likeness) athletes, and seen on

streaming and broadcast commercials indicates a diversified approach with digital content playing a crucial role in attracting and engaging local audiences. The challenges of acquiring and maintaining long-term sponsors underscore the need for innovative strategies, with a clear move toward digital and social media engagement for the success of future partnerships.

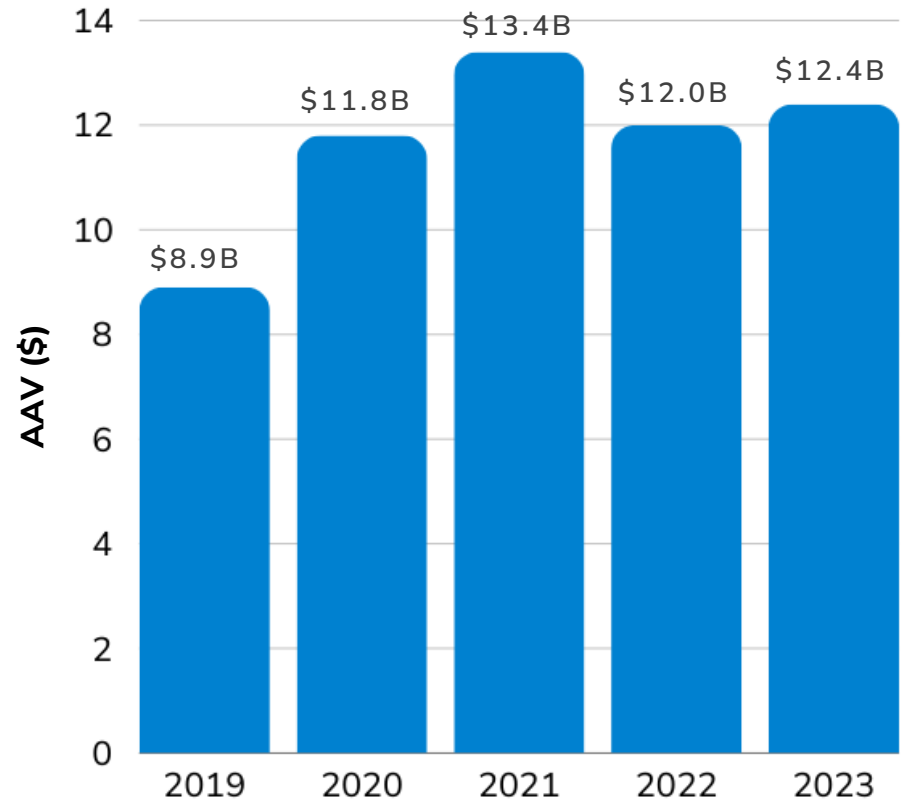


Sponsorship Value in Social

Adjusted Ad Value (AAV)

Social media continues to be a powerhouse for brand exposure, generating an estimated \$12.4B in total adjusted ad value (AAV) across platforms in 2023. Despite the slight dip in 2022, due to fewer deals created in 2021, the average annual growth rate from 2019 to 2023 stands at 9.76%. Excluding the anomaly of 2021, due to effects of the pandemic, the growth rate accelerates to 12.54%, demonstrating the consistent upward trend in social media's influence.

The increase in branded posts, engagement, and views year-over-year and compared to pre-pandemic levels in 2019 highlights the critical role of content selection—from videos to text mentions—in forging successful brand partnerships.



Social Data from 2019-01-01 to 2024-01-01

TREND QUOTED:

"With stories and reels, fans prefer raw and point-of-view content, making it the go-to format for athletes as it is much easier to produce. And despite challenges from Snapchat and TikTok more recently, Instagram remains the 800-pound gorilla of social media."

-RJ Kraus, Co-founder of Hookit

*Quoted in [Sportico](#), Feb. 25th, 2024

Badenhausen, K. (2024). Messi Instagram Followers Hit 500M. [Sportico](#).



Quantifying Social Sponsorship Value

Step 1: Identify Brand Promotion

Step 2: Max Ad Value (MAV) =
Total engagements x CPEs

Step 3: Adjusted Ad Value (AAV) = MAV x Promo Quality



Promotion Quality Factors



Position



Coverage



Clarity



Competition



Crowding



Viewership

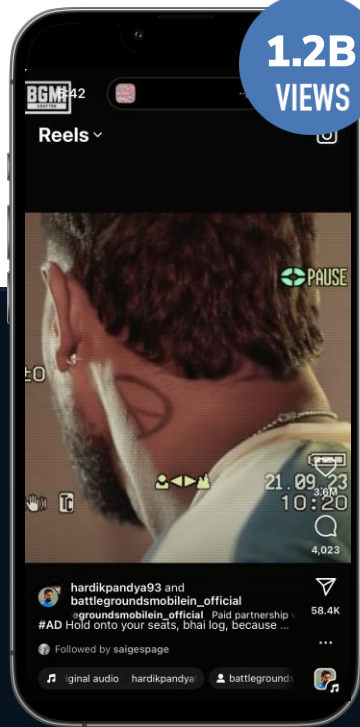
For comparison, Orlando Health received a 40% Promo Quality from this post.



KORE's Presents Top Videos

The top videos that fans shared and watched on repeat...

Cricket



1.2B VIEWS

Most Viewed Video Post in the NFL 2023/24 Season.

"You Got This" Patrick Mahomes, by adidas for Super Bowl LVIII

[LINK TO POST](#)

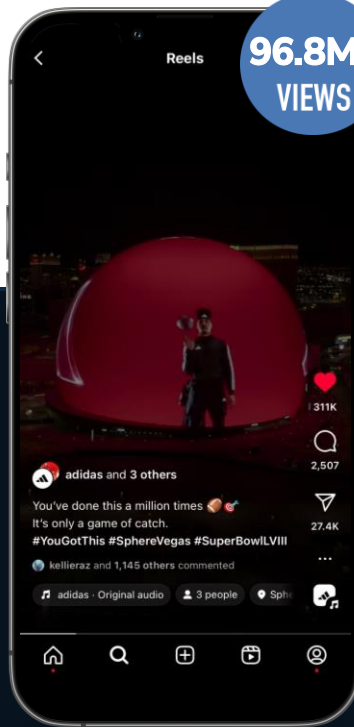


Most Viewed Video of 2023

Cricketer, Hardik Pandya's partnership announcement with Battlegrounds Mobile India (BGMI).

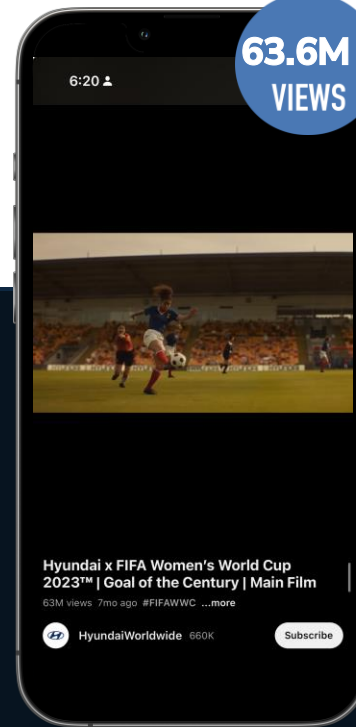
[LINK TO POST](#)

American Football



96.8M VIEWS

Women's Global Football



63.6M VIEWS

Most Watched Video of the 2022/23 NBA Season

Mascot, Rocky, makes the basket, from the ladder! By NBA

[LINK TO POST](#)

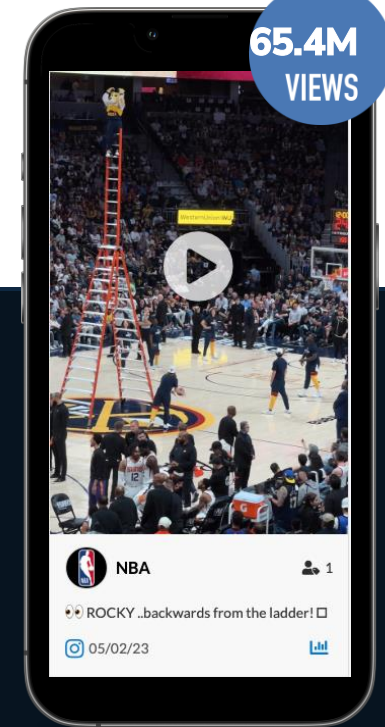


Most Viewed Video During FIFA Women's World Cup (TM)

We've come a long way, women's football. By Hyundai

[LINK TO POST](#)

Basketball



65.4M VIEWS



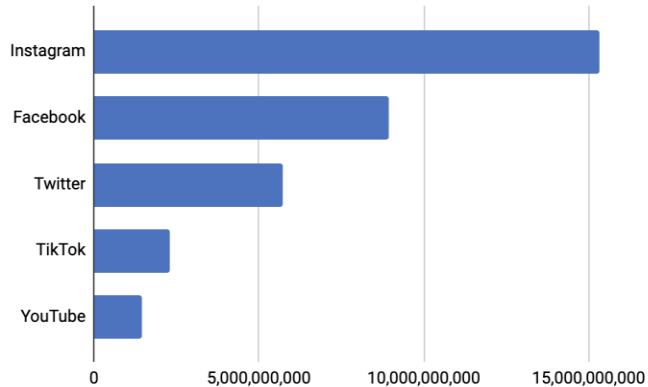
Audience / Summary

29.8 Billion +11.7% YoY

Cumulative Sports Fans on Social

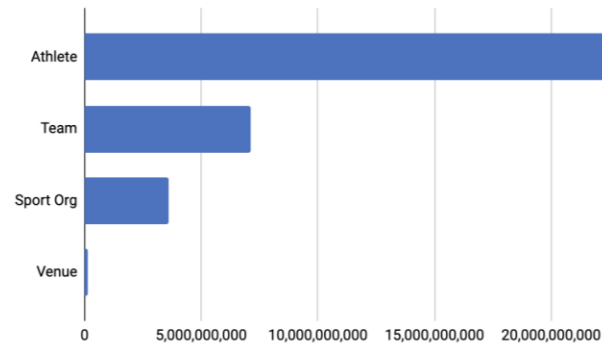
By Platform

45% Instagram



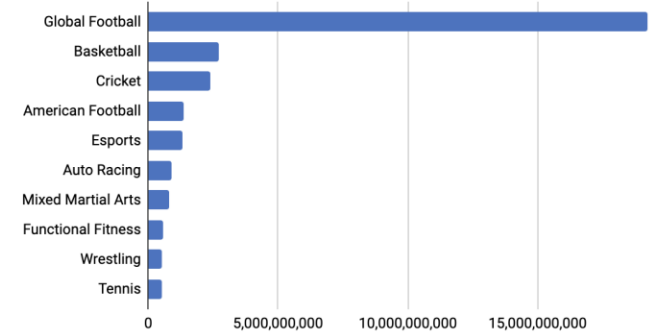
By Entity Type

69% Athlete



By Sport

55% Football

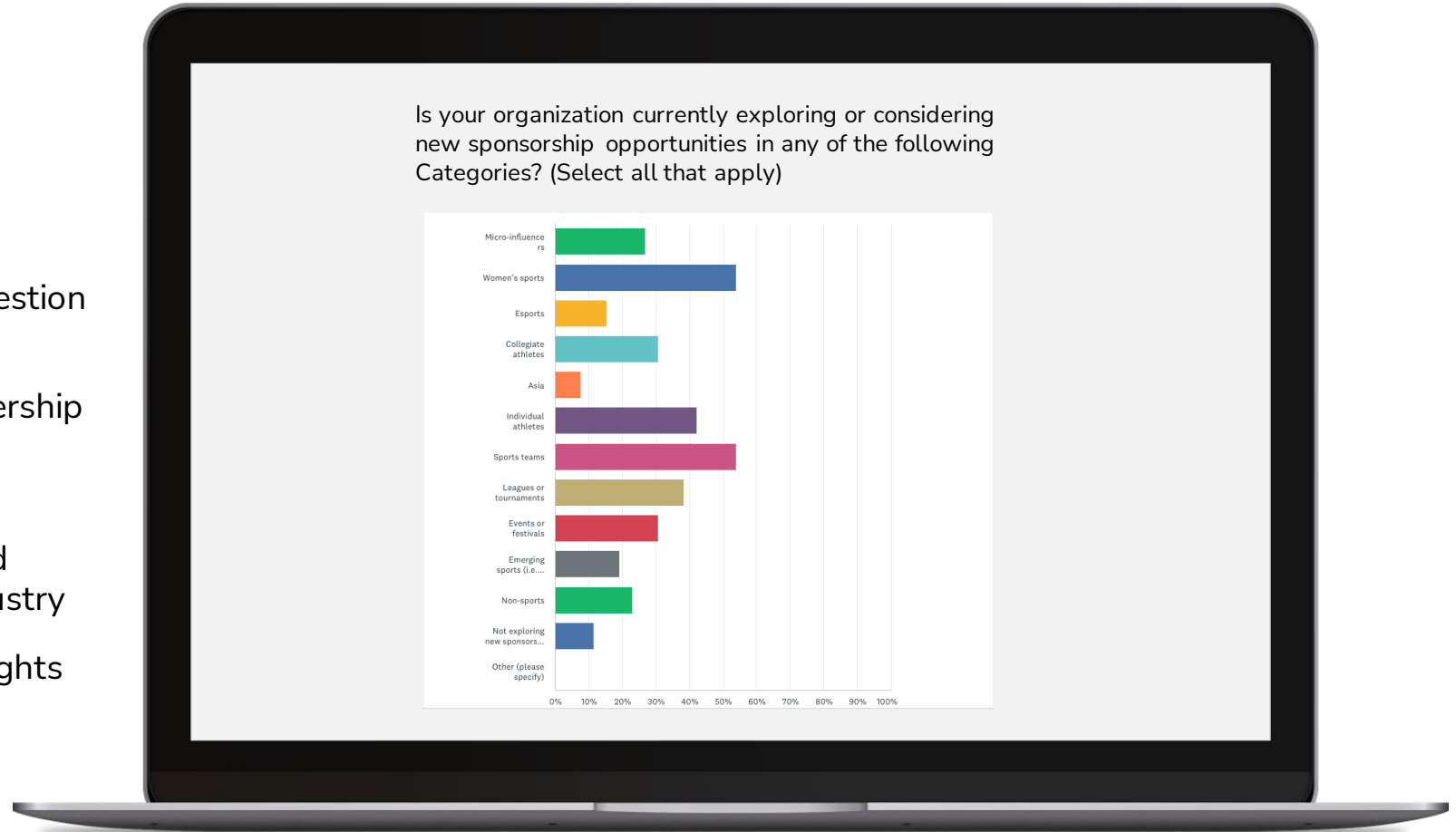




About the Survey

The voices that shape the sponsorship industry.

- **Pioneering Survey:** First-of-its kind, 26-question deep dive into the sponsorship landscape
- **Comprehensive Coverage:** Explores partnership criteria, spend, revenue, goals, operational efficiency, and collaboration
- **Future Forward:** Unveils current trends and forecasting future developments in the industry
- **60+ Brands and rights holders** shared insights between Jan 8th – Feb 3rd, 2024





Cultivating Connection

Survey reveals rights holders' (RH) outlook

Aligned Goals

70% of RHs are unsure about their partners goals and nearly 60% of Brands feel that RHs don't fully understand their goals,

Local vs. National

60% of rights holders earn more from local sponsorships.

Biggest Challenge

Securing new sponsors and **retaining** existing ones.

Opportunity to Build Deeper Partner Connections



Rights Holder's Top 3 Challenges

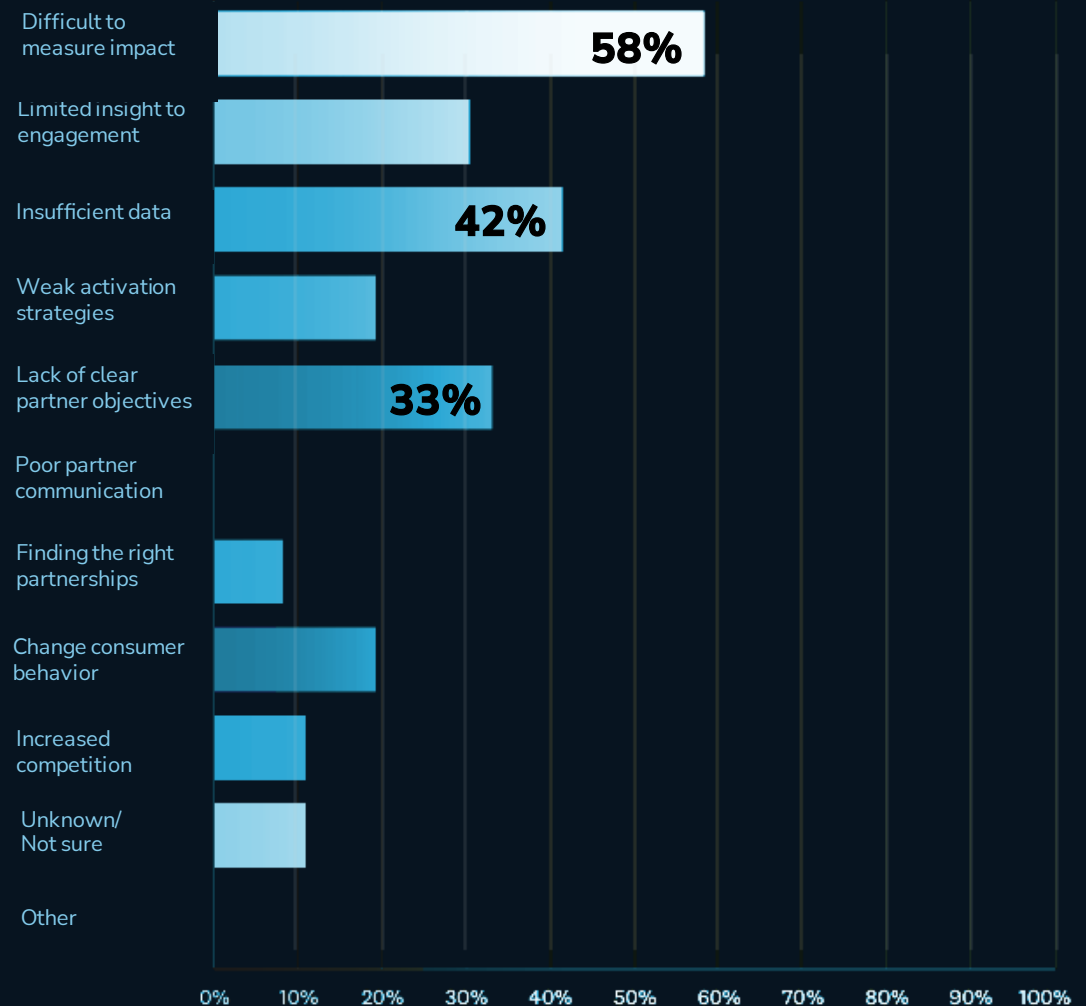
For maximizing sponsorship performance.

To effectively maximize performance, rights holders are obstructed by three main challenges.

- First, an overwhelming 58% encounter difficulties in measuring impact, which keeps them from demonstrating the value they deliver.
- Second, the lack of access to robust data impairs 42%.
- Last, the absence of well-defined or communicated objectives from their partners challenges 33%.

Partnership Enhancement Opportunities

- Brands can support the improvement of sponsorship measurement, cited by 62% as a top priority, by investing in the tools & systems that provide actionable insights.
- Rights holders can commit to more frequent data sharing, which 54% of brands think would improve the partnership.

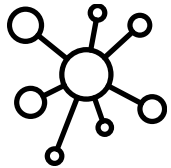




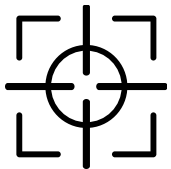
Rights Holder's Survey Highlights



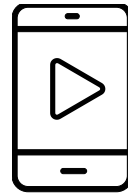
Alignment with Brand Goals: 80% of rights holders prioritize partnerships with brands that have aligned goals, highlighting the importance of shared values in sponsorship relationships.



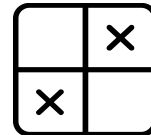
Diverse Revenue Sources: While a majority (60%) of rights holders earn more from local sponsorships, there's a significant portion (40%) that derive substantial revenue from national partnerships, indicating a balanced approach to sponsorship sources.



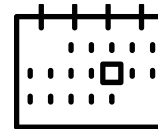
Sponsorship Objectives: Brand awareness and fan engagement are the top objectives for rights holders, emphasizing the focus on visibility and audience connection in their sponsorship strategies.



Digital Content: Over half of the rights holders (53%) are selling digital content as part of their sponsorship packages, reflecting the importance of online platforms in sponsorship deals. Yet 44% of rights holders' content teams consist of 1-5 people to support this growing need.



Challenges in Sponsorship: Securing new sponsors and retaining existing ones are the biggest challenges faced by rights holders, pointing to the competitive nature of the sponsorship market.



Future Trends: Rights holders anticipate increased emphasis on digital activations and social media engagement in future sponsorship strategies, underscoring the shift towards digital-centric approaches.



A Call for Data-Driven Dominance

Survey reveals brands top objectives, targets and desire for more data.

Survey Participants

85% the brand survey responses were from industry experts that work in either marketing or partnerships.

Selective Partnerships

56% of brands work with 100 or less partnerships.

Boost Partner Synergy

- Top of Brands Wishlist:
- Refined data metrics
 - More data sharing
 - Better reporting

Opportunity to improve measurement capabilities



Brand Goals: Awareness and Sales Conversion

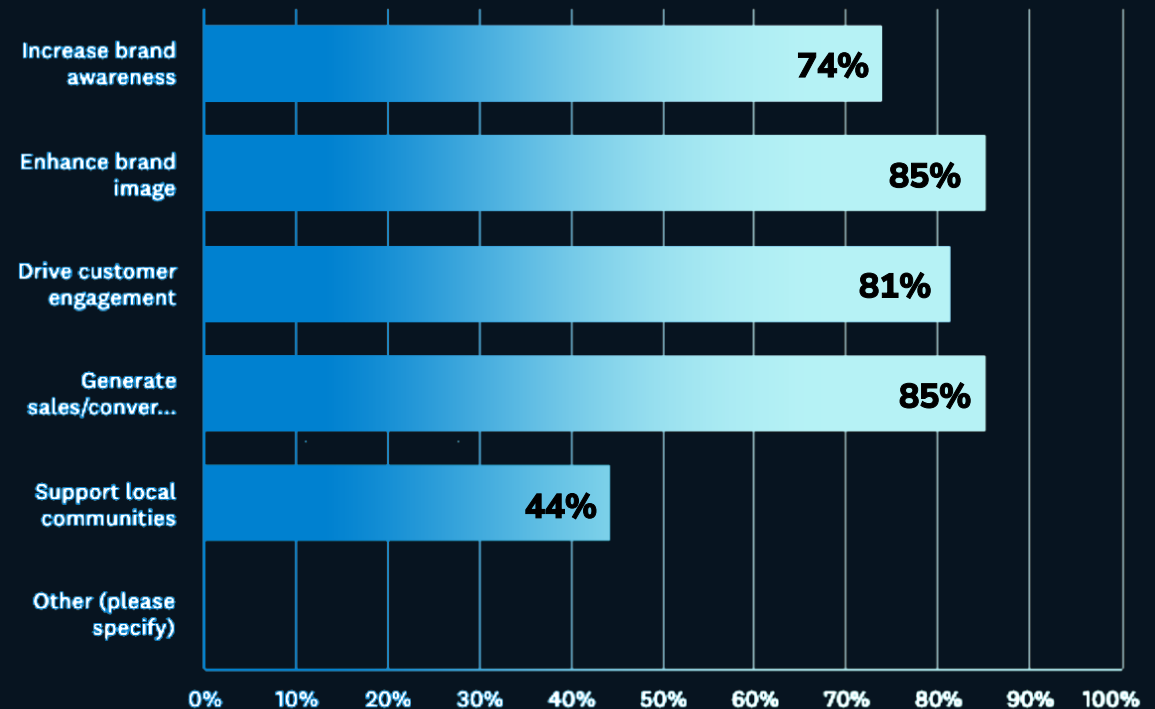
85% of brands surveyed said that increasing brand awareness and generating more sales were their primary goals of sponsorship.

💡 Digital Collaboration Opportunities

Rights holders can effectively help boost their sponsors' sales with timely, engaging digital tactics:

- **Embed Links:** Add clickable links in content to guide fans to sponsor products related to specific events.
- **Promo and QR Codes:** Distribute unique discounts or freebies (like free tacos when your team wins), or discount on sponsor products for a show of talent, like an NBA player making 50 points that game, involve live streaming fans.
- **Social Tags and Codes:** Combine athlete tags with sponsor promo codes or embedded links to extend social reach, awareness, and direct shopping links.

Brand's Top Sponsorship Priorities





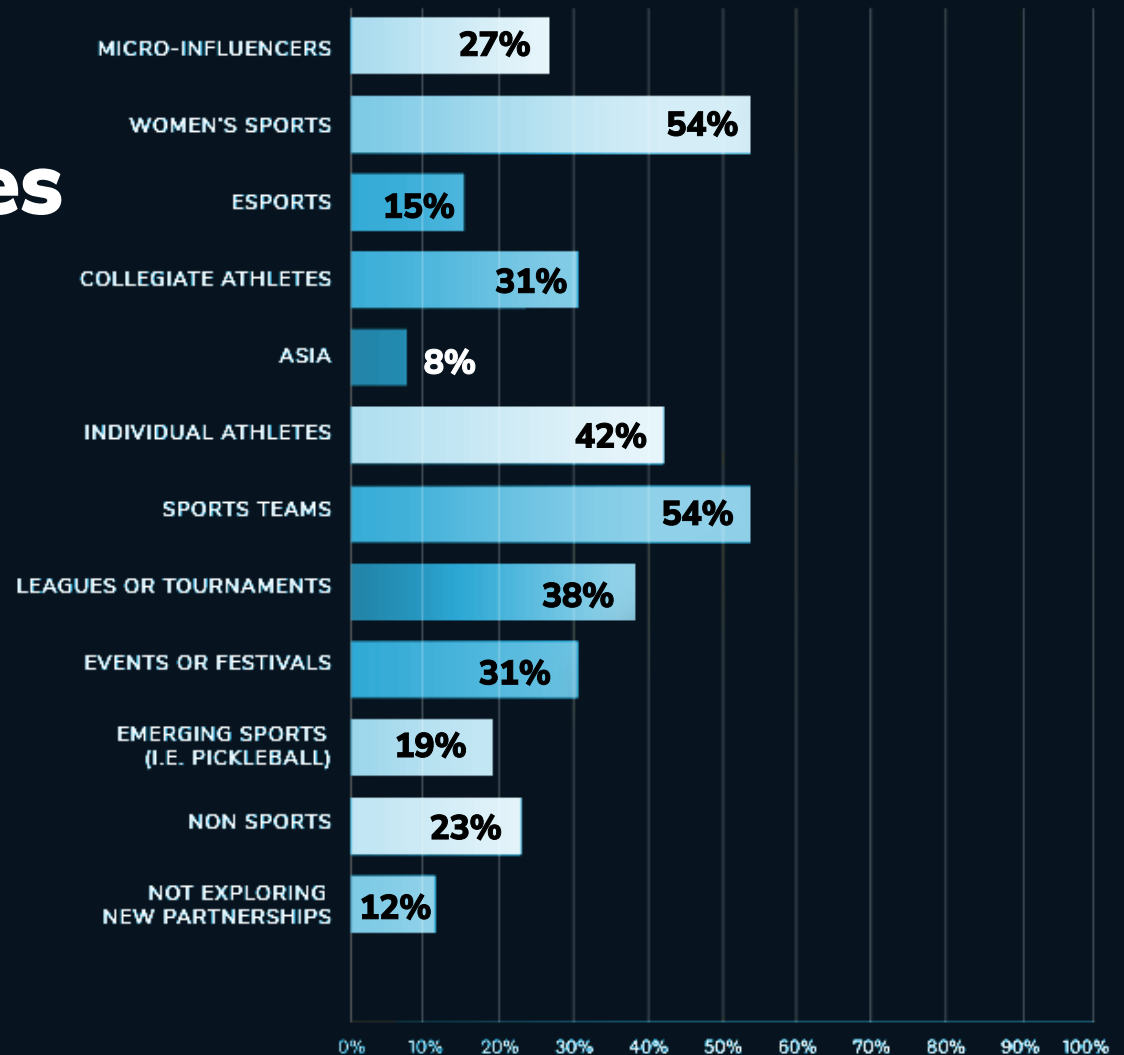
Brand Targets: Women, Teams & Individual Athletes

Breaking down current brand targets.

- Brands are strategically targeting digital and social assets this year, with a heavy focus on women's sports and sports teams, both capturing 54% of partnership interest.
- Depending on how you categorize individual athletes and collegiate athletes, combined, that could be even a bigger focus.
- We see a more cautious approach toward new arenas such as pickleball, an emerging sport, and the Asian market with a modest 19% and 8% of interest.

💡 Digital Opportunities

Teams and their athletes can work together on collaborative social activations to maximize the performance of their partnerships and implement data-driven tools & tracking to prove the value created.





Digital Content & Data Measurement's Role in Partnerships

Rights holders feel that their top partnership objectives are brand awareness, and fan engagement, while 85% of brands top objectives are enhancing brand image and driving sales. These priorities are centered on visibility. Digital content is more important than ever to achieve this. Do rights holders have the infrastructure in place to support digital content obligations, its growth, and the ability to measure the value their partners are looking for?

Eighty one percent of rights holders said that data analysis is moderately or minimally part of their sponsorship or campaign activation decisions, yet most brands (62%) feel that improved data measurement is the primary way to partner better together. Who is leading this effort, and can it be a collaboration across both sides of the table? **More conversation, expectation setting, and commitment to data sharing between partners is needed to fill this gap.**



Key Opportunities to Partner Better

Goals & Objectives Understood



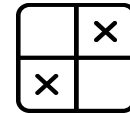
- **Rights holders:** 75% feel their partners goals and objectives aren't totally clear.
- **Brands:** 63% feel that their partners don't fully understand their objectives.
- **Opportunity:** There is a wide gap of objective alignment. rights holders and brands should focus on clearer communication and mutual understanding of goals to bridge this gap.

Digital Content



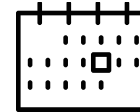
- **Rights holders:** 53% are selling digital content as part of their sponsorship packages.
- **Brands:** 60% are looking for digital content in their sponsorship deals
- **Opportunity:** There is a clear demand for digital content from brands. Rights holders should continue to develop the infrastructure needed to support and emphasize their digital offerings to meet this demand and attract more lasting partnerships.

Challenges in Sponsorship



- **Rights holders:** Biggest challenges are securing new sponsors and retaining existing ones.
- **Brands:** Primary challenge is measuring ROI and aligning sponsorship with overall marketing strategy.
- **Opportunity:** Both parties could benefit from more collaborative approaches to address these challenges. For example, rights holders could provide more data and insights to help brands measure ROI, while brands could work more closely with rights holders to integrate sponsorships into their broader marketing strategies.

Future Trends



- **Rights holders:** Anticipate increased emphasis on digital activations and social media engagement.
- **Brands:** Also looking for more digital and social media integration in their sponsorship deals.
- **Opportunity:** Both parties are aligned on the importance of digital and social media in the future of sponsorships. Collaborating on innovative digital activations could be a key area for growth and mutual benefit.



Sponsorship Benchmarking Survey

Receive the full survey results and insights, by reaching out to info@koresoftware.com and request a copy of the **2024 Sponsorship Industry Benchmarking Report** to learn:

- Geographic and occupational demographics
- Financial outlays
- Revenue
- Objectives
- Targets
- Efficiency in operations
- Prevailing industry movements
- Projections on future trends
- + More



Breaking it Down

What sectors are spending on what assets
and who/where is the value delivered.

We categorize global sponsorship spenders into 16 sectors. In this section we break down how those sectors are spending on what assets, who the biggest investors are, trends and opportunities to target.



Spend Trends

More spend, less partnership deals.

+4% Spend, -14% deal count

53%

Deal revenue comes from signage & entitlements, 10% from digital specific activation

50%

Deal revenue comes from 4 sectors: financial, food & beverage, retail and automotive with financial spend at an all-time high

44%

Of Rights Holders are looking to partner with Logistics, Insurance and Travel partners in the coming year



Global Sponsorship Spend Trends

According to KORE's 2023 spend data across global sport, sponsorship partners in financial services deliver the highest amount of revenue for rights holders. Retail spending rose 26% year-over-year, while its number of deals dropped by nearly 32%.





Financial Sponsors & Rights Holders

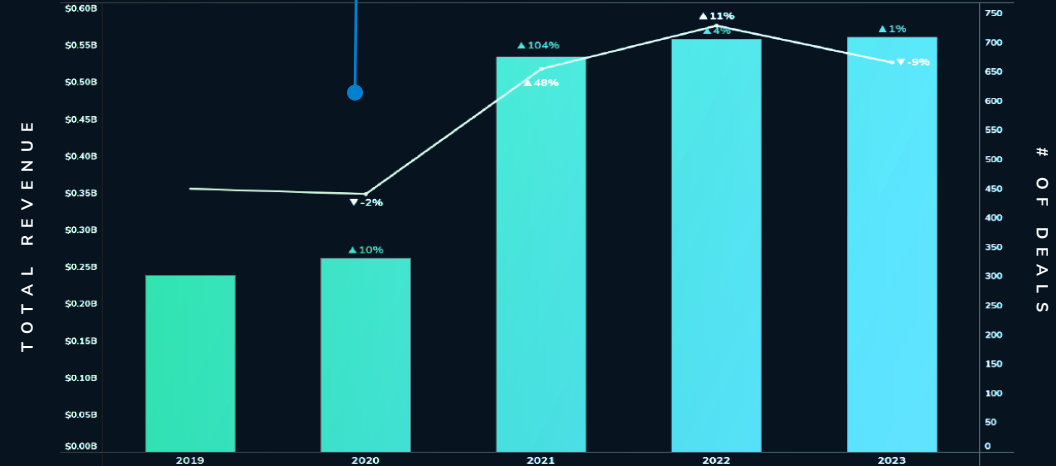
A strategic match in 2024.

In North America financial partners average 62% less in total amount of deals than the food & beverage sector, yet they spent nearly the same.

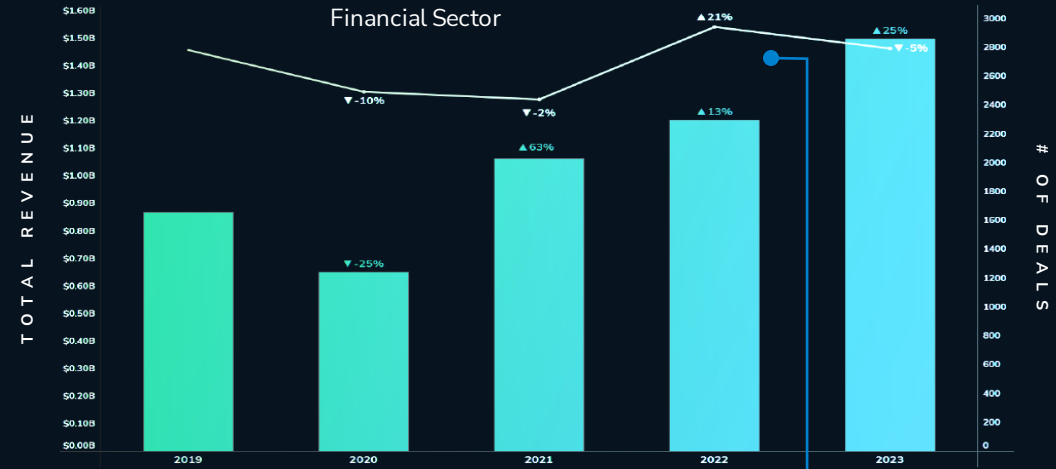
Globally, the financial sector leads, spending 8% more than food & beverage committing to 42% less deals.

Targeting financial organizations is a smart strategy across the globe but lends a bigger opportunity for Rights Holders in North America versus the global view.

Big 5 Leagues N. America



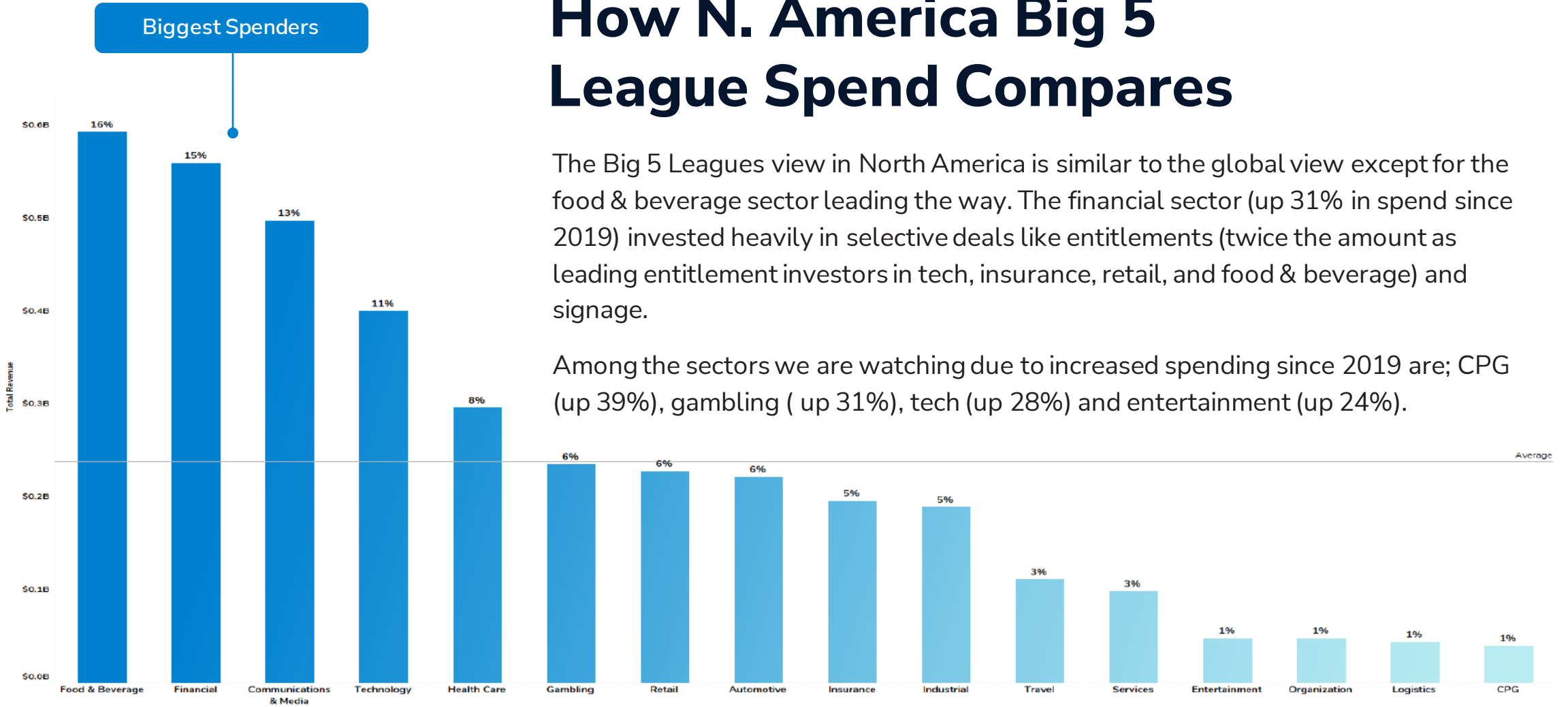
YoY Increase in revenue vs. # of Deals Financial Sector



Global



How N. America Big 5 League Spend Compares



The Big 5 Leagues view in North America is similar to the global view except for the food & beverage sector leading the way. The financial sector (up 31% in spend since 2019) invested heavily in selective deals like entitlements (twice the amount as leading entitlement investors in tech, insurance, retail, and food & beverage) and signage.

Among the sectors we are watching due to increased spending since 2019 are; CPG (up 39%), gambling (up 31%), tech (up 28%) and entertainment (up 24%).



Sponsorship Spending Trends

Sectors to Watch

According to our survey, global rights holders want to target partnerships in the following sectors:

53% - Technology

Opportunity to sell: Tech companies have cut down on the number of deals YoY but their biggest focus remains on tickets & hospitality, then signage and digital.

44% - Logistics/Transportation

Opportunity to sell: Logistics brands primarily look for tickets/hospitality or digital/signage assets in the Big 5 Leagues across North America. Globally, logistics brands are primarily focused on digital assets.

42% Insurance & Travel

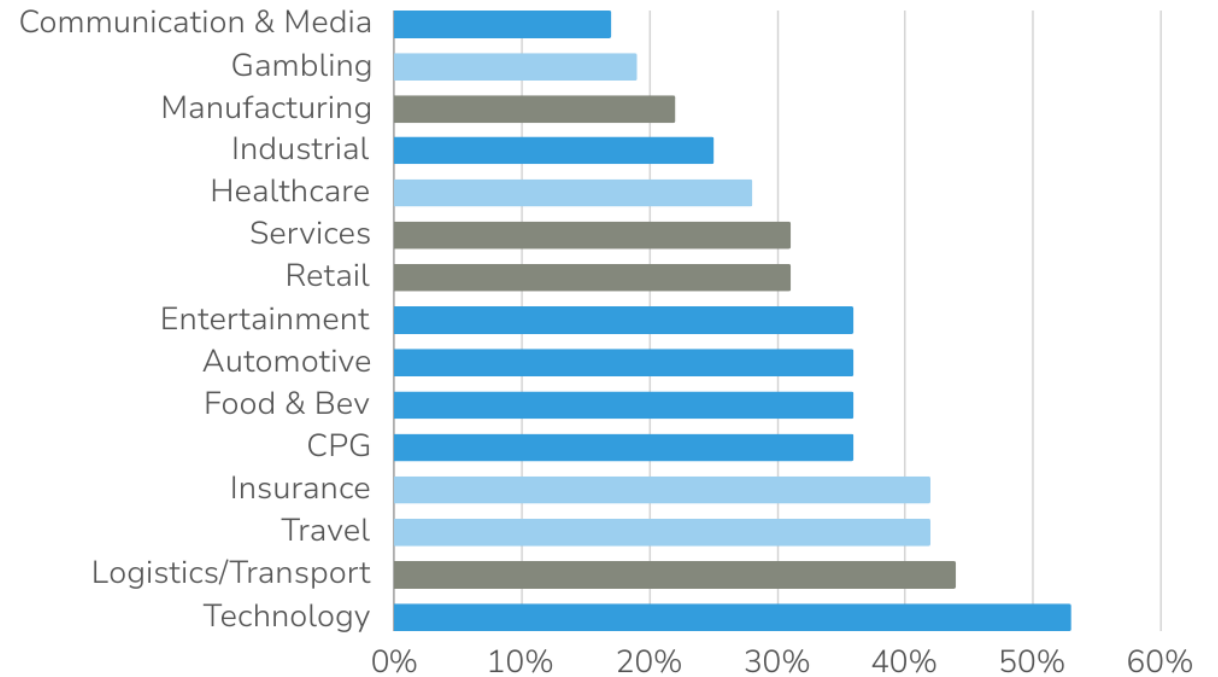
Opportunity to sell: Insurance and travel brands look for big ticket assets (digital, signage promotions) globally. In the Big 5 Leagues, travel and insurance brands focus on signage, digital, and tickets/hospitality assets.

36% Entertainment, Automotive, Food & Bev, & Consumer Packaged Goods (CPG)

Trends: Entertainment spend, deals, and partners decreased YoY. Automotive spend slightly increased but deals decreased demonstrating that partners are willing to spend more on the right deal.



Rights Holder's 2023/24 Industry Targets



Sponsorship assets, revenue, and spending data or insights reflective of 2022/23 NFL, MLB, NBA, MLS, & NHL sport seasons.

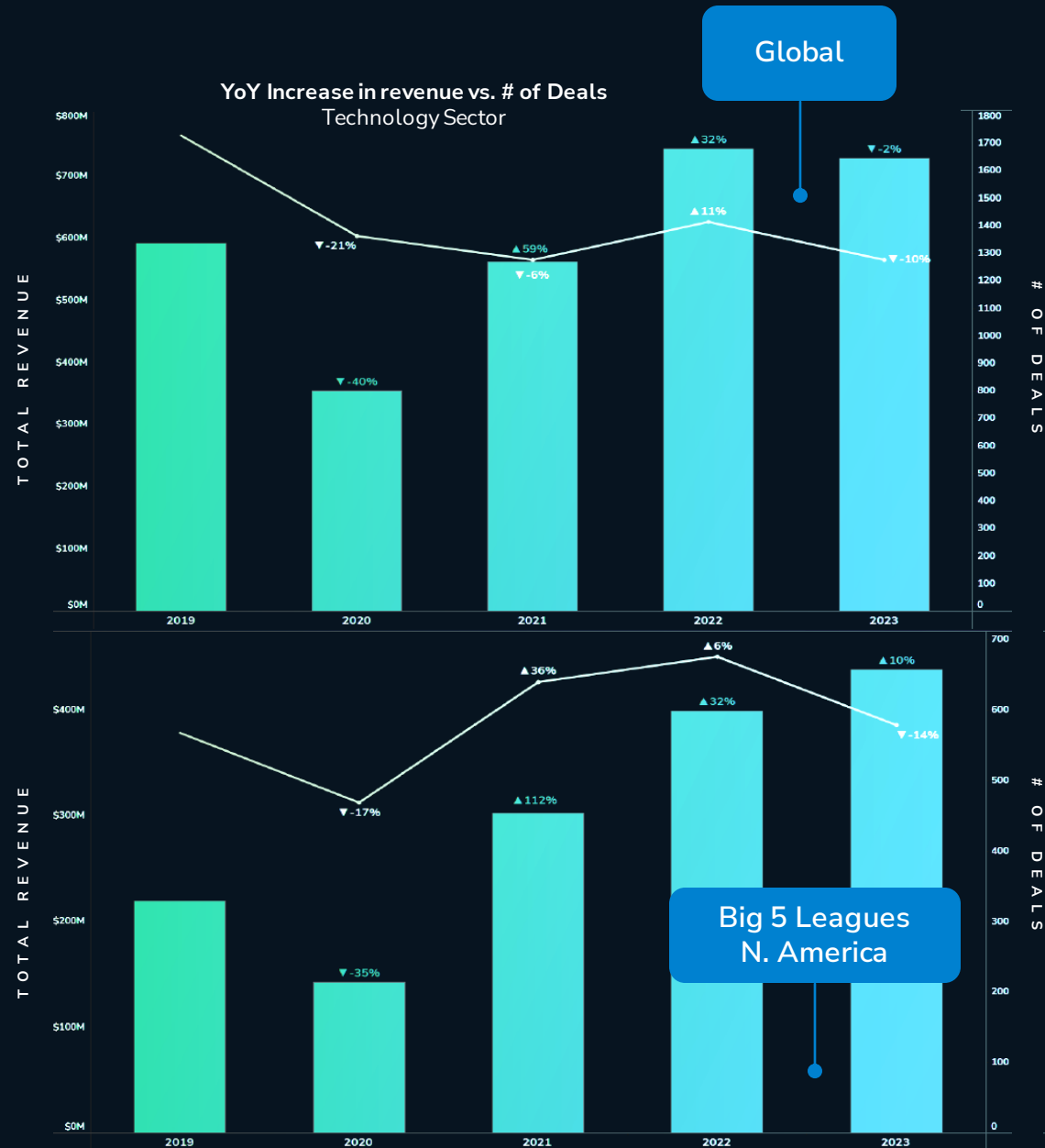


Selective Surge

Partnerships in tech are a booming opportunity in North America, Less so, globally.

53% of rights holders are eyeing the technology sector for partnerships, following its high spend in the North America Big Leagues 2022/23 season, which surpassed the average spend by 95%.

However, 2023 saw a global reduction in tech sector deals, although North America's leagues experience a sustained 38% increase in tech funding since before the pandemic.






Spend & Value Movement By Industry









The sectors getting the most value for their spend.

To identify who gets the best value from social media, we ranked sectors based on spend data and media exposure value. Retail continues to reign supreme in value gained in 2023, while their spend on North American Big Leagues year-over-year remained relatively the same but dropped in ranking due to other sectors (communication & media, tech, gambling and healthcare) that have increased spend.

Since the beginning of 2024 the automotive sector is trending up in social value, while spend remains fixed. This trend could lead to substantial social value increase for that sector. Entertainment organizations continue to rise in value, with the lowest spend ranked. The financial and communications & media sectors have the most opportunity to improve value across social based on their spend.

 **Collab Opportunity:** Brands in financial or communication & media sectors could work with their partners to develop ways for their logo and name to be positioned better within social media activations to earn more branded value.

Sponsorship assets, revenue, and spending data reflective of 2023/24 NFL, MLB, NBA, MLS, & NHL sport seasons.

Industry	Social Value Rank	2023 Spend Rank
Retail	1	8
Food & Beverage	2	 1
Technology	 3	4
Automotive & Powersports	4	7
Financial	 5	2
Travel	 6	11
Entertainment	 7	12
Gambling	 8	6
Communications & Media	 9	3
Industrial	 10	10
Insurance	11	5
Healthcare	12	9

Social Data from 2023-01-01 to 2024-01-01

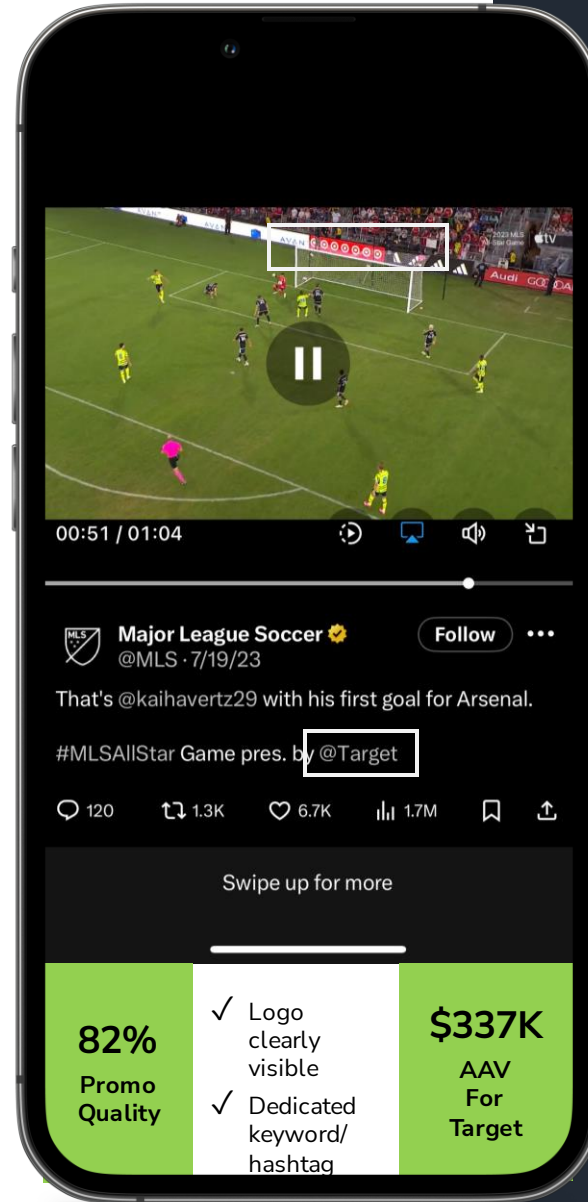


Top Assets in 2023/24

Asset inclusion discussion across the North American Big Leagues.

Sponsorship Assets Explainer:

Assets are the components of a partnership deal, such as signage, entitlements, tickets and hospitality, social, and digital. The first graph on page 35 illustrates the proportion of sponsorship revenue linked to these assets and benefits. The second graph demonstrates the assets that are consistently incorporated into contracts, showcasing their importance in deal structure.



Compared to the 2023/24 season, signage, entitlements, and tickets and hospitality, collectively accounted for the same percentage of revenue as the previous year at 70%, for rights holders. Social & digital asset inclusion continues to climb, moving into the 3rd most included deal asset, while driving nearly 10% of sponsorship sellers revenue.

Opportunity: Brands and rights holders can work together with digital activation teams to visually work in brand signage or their logo treatment into social/digital media activations amplifying a brand's media exposure.

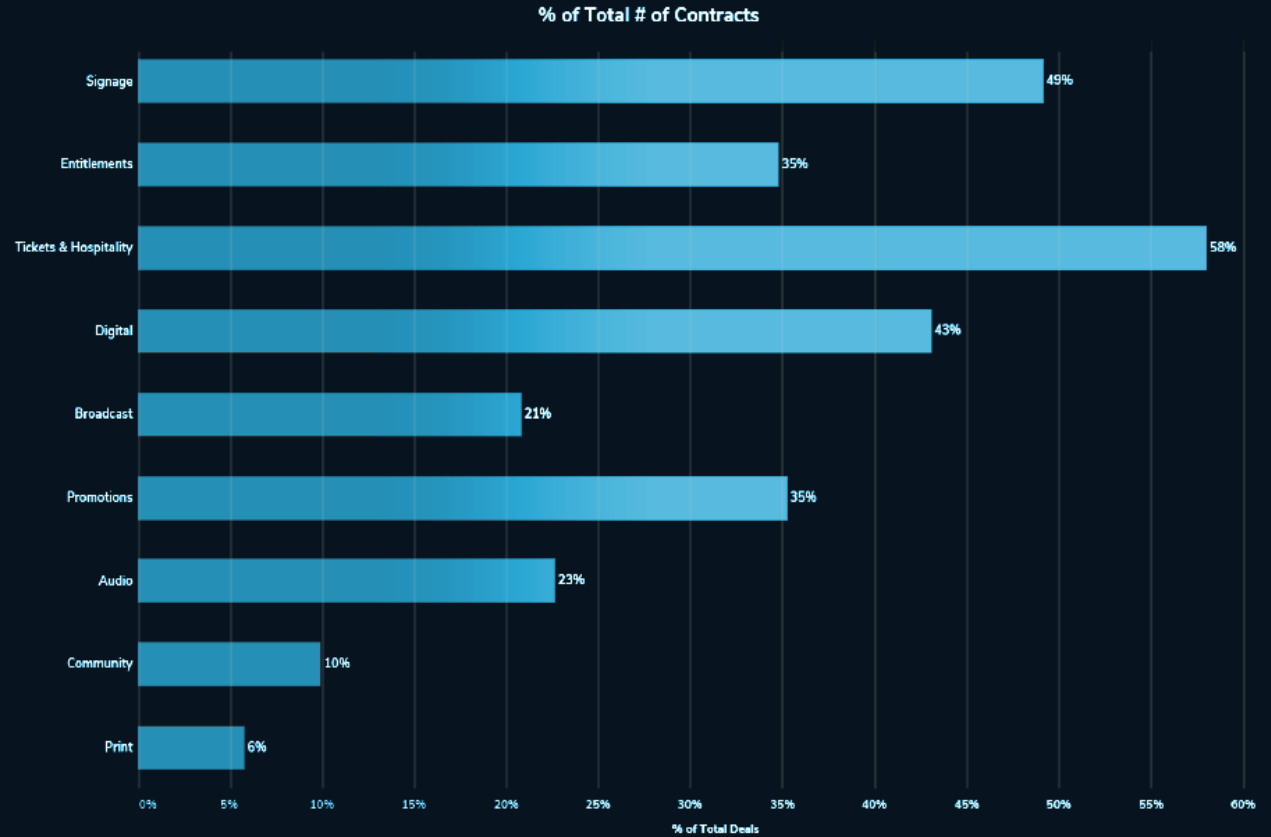
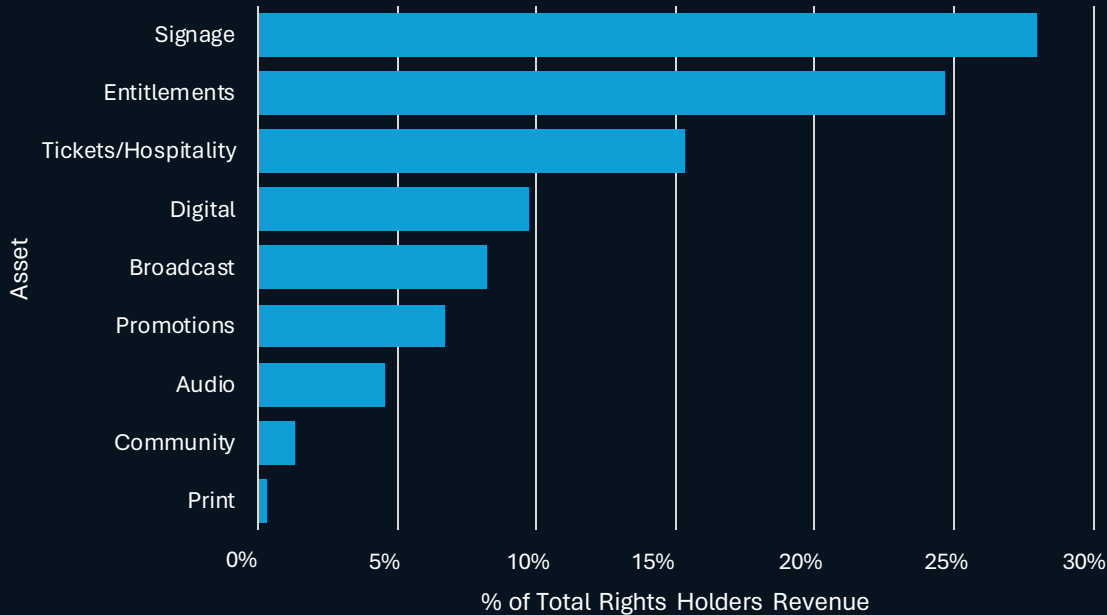
Rights holders that can measure the value of campaign activations with their partner's signage or logo placement can negotiate more favorable contract terms for similar campaigns.



Top Assets in 2023/24

Revenue drivers and deal inclusion across the North American Big Leagues.

Signage and Entitlements Drive 53% of Rights Holders Total Revenue








- Tickets & hospitality, and signage remain the most included assets in deals year-over-year.
- Social & digital asset inclusion continues to climb, moving into the 3rd most included deal asset, while driving nearly 10% of sponsorship sellers revenue.



Top Assets By Deal Inclusion

2023/24 Big League Season

					
1	Tickets & Hospitality 67%	Signage 73%	Tickets & Hospitality 49%	Tickets & Hospitality 70%	Signage 61%
2	Promotions 60%	Social & Digital 66%	Signage 39%	Social & Digital 54%	Tickets & Hospitality 46%
3	Signage 59%	Tickets & Hospitality 65%	Broadcast 35%	Signage 41%	Social & Digital 40%
4	Entitlements 50%	Promotions 46%	Social & Digital 33%	Entitlements 37%	Entitlements 30%
5	Audio 38%	Entitlements 44%	Entitlements 33%	Promotions 34%	Promotions 27%
6	Social & Digital 27%	Audio 17%	Promotions 30%	Audio 29%	Audio 19%

Snapshot: Tickets & hospitality continue to be the NBA's top asset for deals, but its inclusion has dropped 15% year-over-year. Since each league's previous season, social & digital asset inclusion continues to climb.



Global Football Fan Attendance

Focus Ticket Products on Women

Over the years our data has pointed to the imperative and high growth opportunity of women in sport for partnerships. With the acquisition of London-based **Sports Alliance**, a leader in fan engagement solutions across Europe, we now have data highlighting the imperative to focus fan engagement marketing on women supporters of all teams, leagues, athletes, and events.

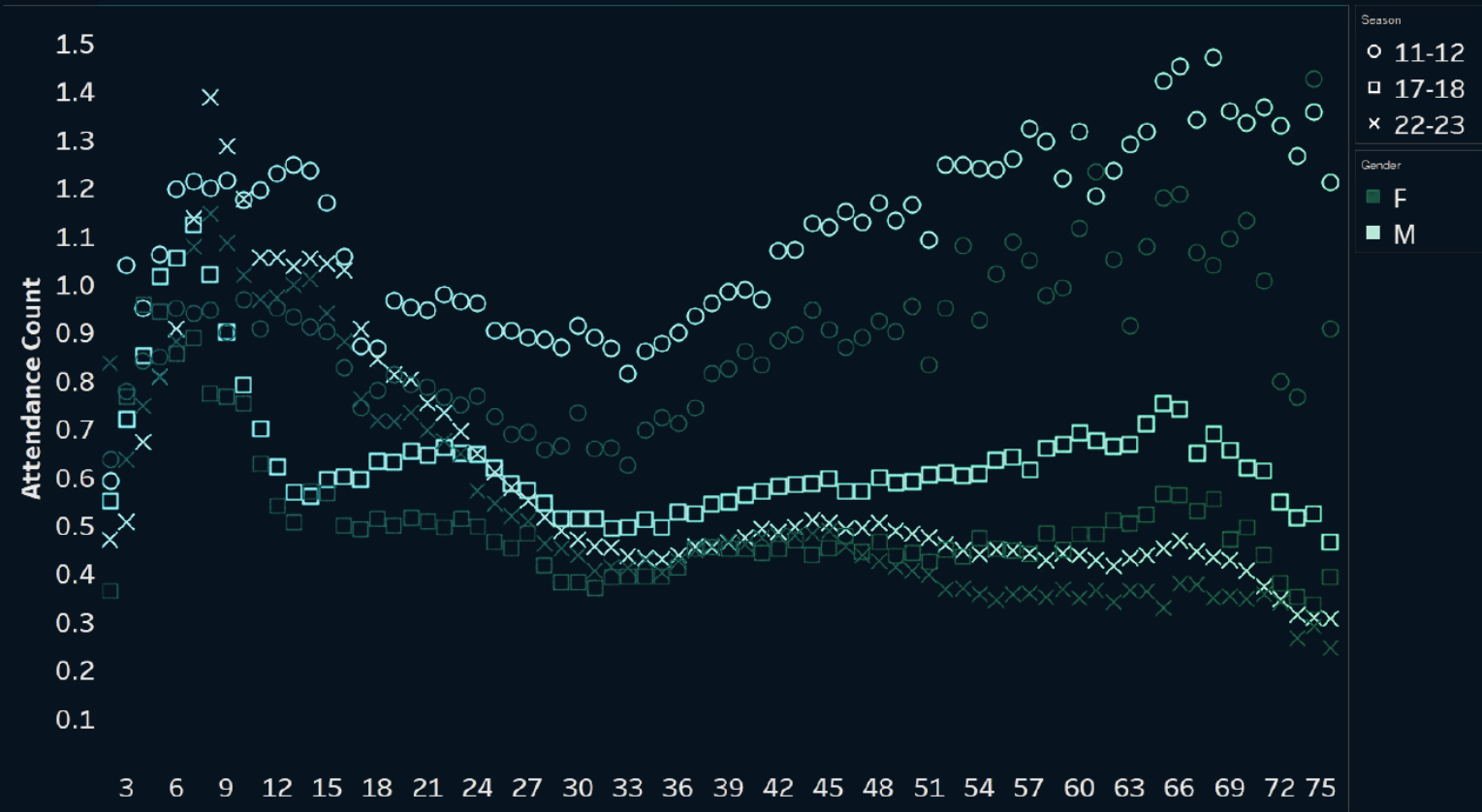
Learn why.



Decade of Change

Female fans over 50 closing in on male attendance numbers.

What We See



- A decade's downward trend in match ticket purchases
- Stadium revisits postponed: a shift from 30s to 40s among adults
- Stadiums are experiencing a notable rise in female attendance

This graph illustrates a significant trend over the past decade: the previously wide disparity in stadium attendance in Europe, between male and female ticket holders has notably decreased.

Specifically, the most recent completed season, 2022-2023, shows a reduced attendance gap among females over the age of 50, reflecting a positive shift towards gender balance in sport events.

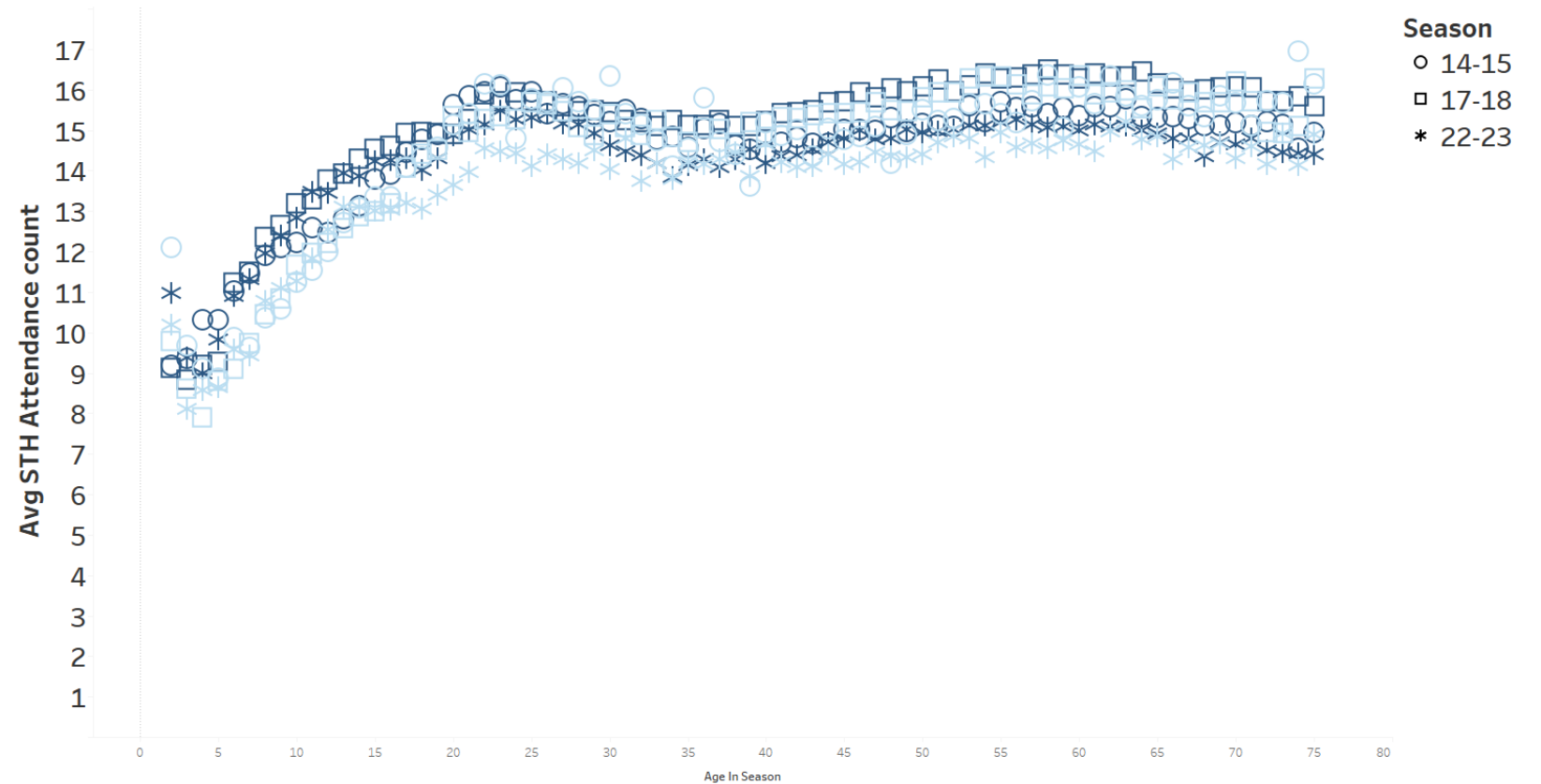


Gender Disparities Diminish

In stadium attendance for season ticket holders.

■ The ticket data seen here contrasts the attendance trends for Season Ticket Holders (STH) over the last decade. A noticeable change is that the distinct patterns of attendance by gender have become less defined, indicating a blending of behaviors.

Ten years prior, the attendance rates of female and males were largely comparable. However, the 2022-23 season exhibits a decline in the average attendance for both genders, signifying a shift in dynamics for STH.



Fan ticket data between comparisons of European football club seasons: 2014-15, 2017-18, and 2022-23

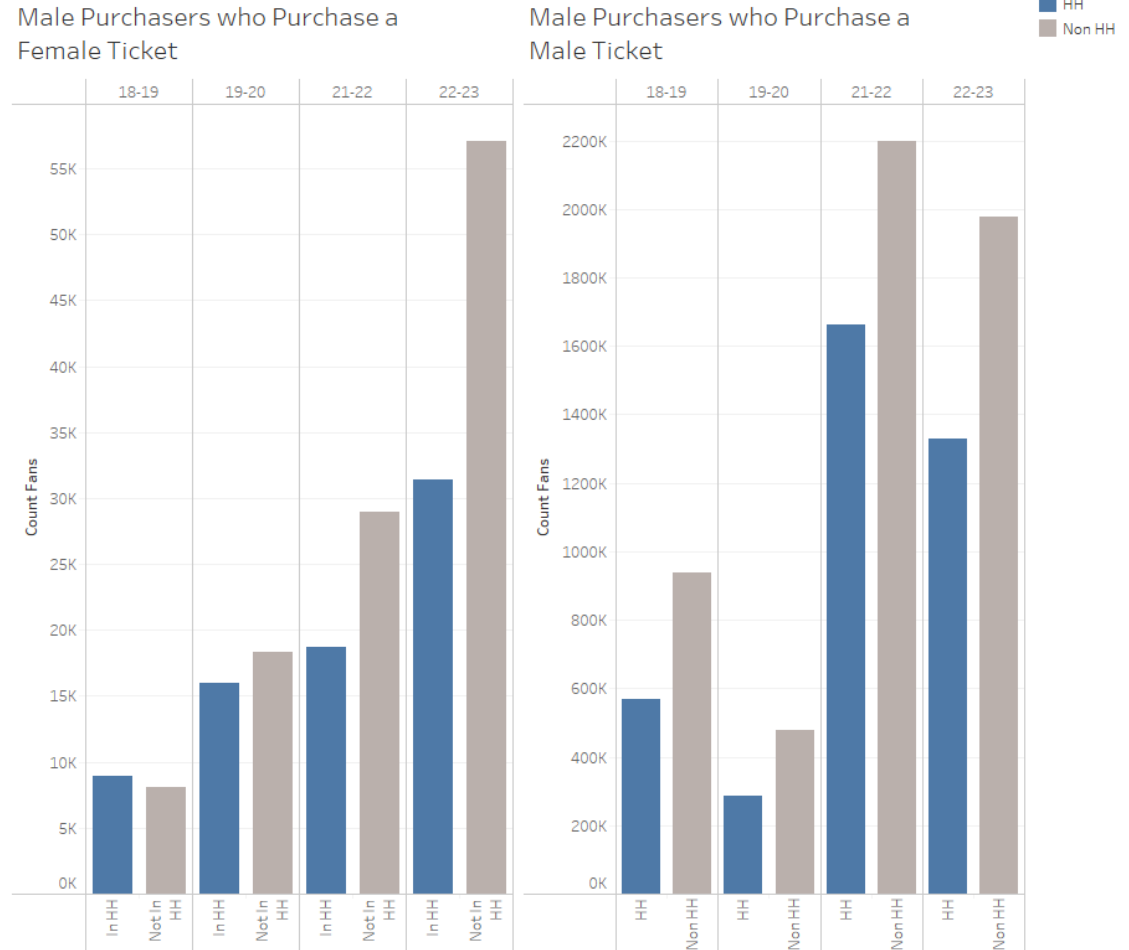


Sports Tickets: Male Buyers Flying Solo

Data reveals single males outspend those in households.

The data here present a trend where male sports ticket buyers who are not part of a larger household tend to spend more across different type of matches.

This contrasts with household-based males, suggesting that single or solo living males are key in ticket sales for both male and female matches.



Fan ticket data between comparisons of European football club seasons: 2022-23



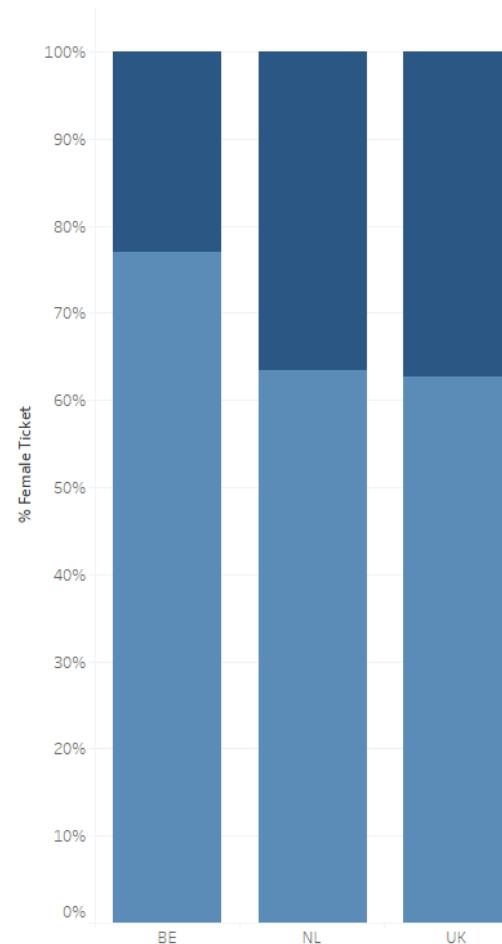
Male Dominated Ticket Purchases

% Ticket Purchase v Gender

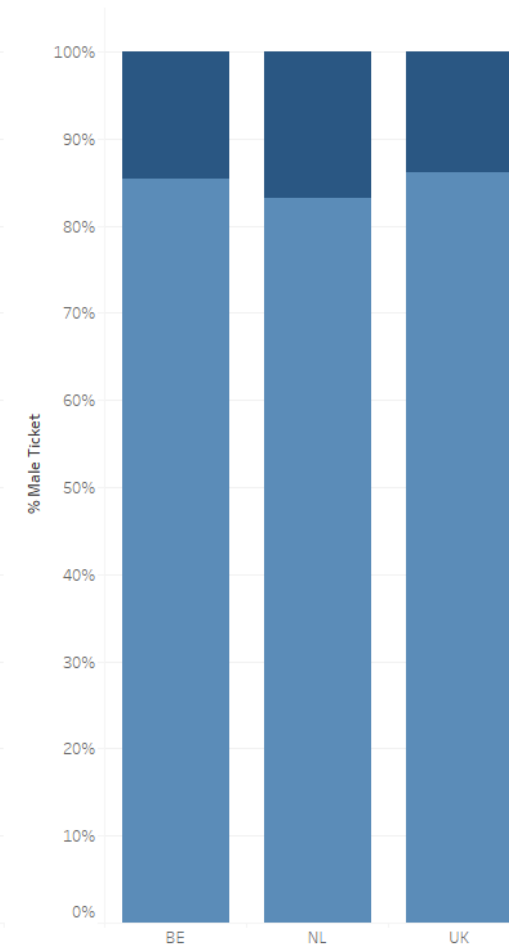
Purchaser Gender	% Female Tix	% Male Tix
F	36.63%	14.59%
M	63.37%	85.41%

The data here indicates a clear gender disparity in ticket purchasing, with males being the predominant buyers for both ticket types.

% Female Purchaser v Country



% Female Purchaser v Country



F
M

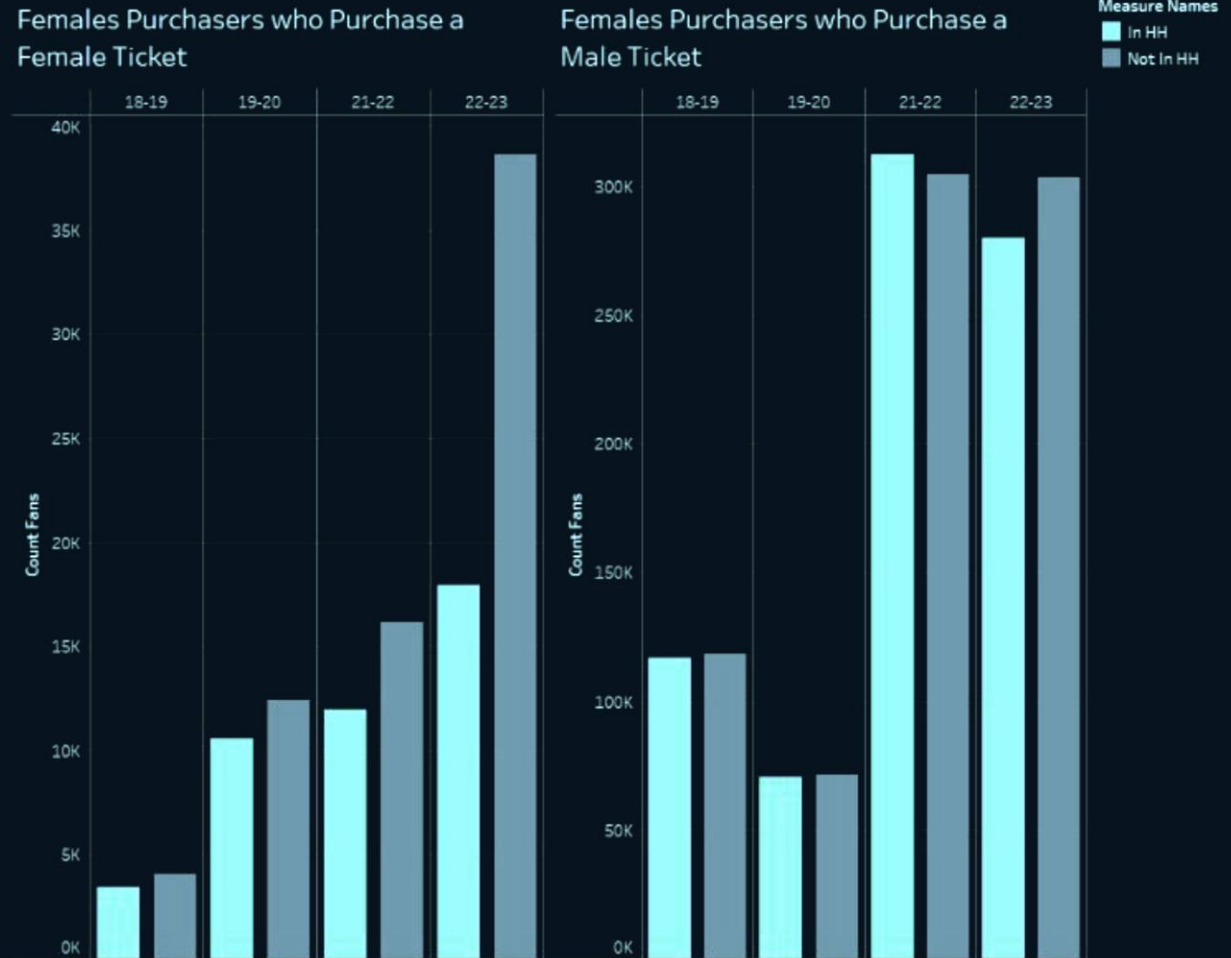


Household Status Affects Female Ticket Sales

Single females lead in women's match ticket purchases.

The data shows a growing number of female purchasers for sports tickets, predominantly for male matches. Notably, females not living in a household (presumably single or living alone) tend to buy more tickets for female matches compared to those living in a household, who purchase male and female match tickets at similar rates.

This trend highlights the impact of household status on consumer behavior in sports ticket purchases.





The Gender Gap

Women's football season tickets lag behind men's by over 95%.

Insights

- Only 10% of football clubs offer dedicated season tickets for women's games.
- The average number of women's season ticket holders (STH) is 460, in stark contrast to 9,000 for men's.
- In the 2022-23 season, 190,000 tickets were sold for women's matches compared to 8 million for men's.
- Women's matches typically take place in smaller venues without access control systems.

Opportunities

With a high percentage of brands wanting to focus on women in sport, investing now is imperative for gains in an expanding market securing long-term loyalty, and capitalizing on the positive social impact.

- **Social Value:** Engagement with women's sports entities has been growing over 2x that of engagement with men's over the last four years, according to our social data reporting.
- **Develop and Grow Gen Z Loyalty:** Gen Z audiences, known for their passion for equality are highly engaged with women's sports across social and streaming. Brands can leverage this to connect with a younger audience as they grow.



Social Deep Dive

Sport is Social.

The top 20 brands earning value on social explained.
Why Lionel Messi's 500 million followers' news is trending in 2024.
How the Los Angeles Rams increased their fan engagement by 75% this past season. Who fans follow and engage with the most on social across athletes, teams, leagues and events, plus audience data and so much more.



Top 20 Brands By Sponsorship Value

2023 Leaders: Brands Maximizing Partnerships on Social

Rank	Brand	Industry	AAV	AAV Change YoY	Promo Quality	Promoters
1	Nike	Retail	\$879M	1%	24%	19,700
2	adidas	Retail	\$484M	-6%	27%	11,335
3	Emirates	Travel	\$416M	15%	35%	2,961
4	Puma	Retail	\$216M	-.5%	27%	5,999
5	Red Bull	Food & Beverage	\$193M	3%	36%	5,325
6	Monster Energy	Food & Beverage	\$156M	32%	36%	3,286
7	Qatar Airways	Travel	\$134M	25%	32%	1,588
8	Tata Group	Organization	\$108M	35%	36%	345
9	Amazon Prime	Communication & Media	\$125.8M	--	14%	3,798
10	EA	Entertainment	\$120M	37%	36%	2,453

Social Data from 2023-01-01 to 2024-01-01

SOCIAL DIVE: TOP BRANDS

Discussion Topics:

- Rankings explained on page 47.
- Request a deep dive into where your partners or brand ranks from info@koresoftware.com.



Top 20 Brands By Sponsorship Value (Cont...)

2023 Leaders: Brands Maximizing Partnerships on Social

Rank	Brand	Industry	AAV	AAV Change YoY	Promo Quality	Promoters
11	Mastercard	Financial	\$120M	24%	37%	1,332
12	Heineken	Food & Beverage	\$116M	-9%	38%	1,452
13	Amazon	Retail	\$102M	--	13%	3,450
14	Etihad Airways	Travel	\$97M	41%	30%	931
15	Google	Technology	\$88M	45%	22%	3,765
16	Santander	Financial	\$86.4M	-85%	35%	1,027
17	State Farm	Insurance	\$86M	8%	25%	1,123
18	Mercedes-Benz	Automotive & Powersports	\$82M	8%	32%	2,987
19	Toyota	Automotive & Powersports	\$74.5M	26%	32%	4,610
20	TeamViewer	Technology	\$74.2M	-2%	32%	440

Social Data from 2023-01-01 to 2024-01-01

SOCIAL DIVE: TOP BRANDS

👉 Noteworthy:

- **Etihad Airlines** climbed 17 spots, thanks to their continued partnership as the jersey sponsor for Manchester City, who created 48% of their total value on social. Becoming the official sponsor of the Indian Premier League (IPL) cricket team Chennai Super Kings, could have strong impact on their ranking for next year.
- **Google** climbed 25 spots – mostly due to their NBA partnership. The sport of basketball drove 40% of their overall value on social.



Top 20 Brands By Sponsorship Value

Ranking Explainers

Retail's Big 3 Overview:

Nike and **adidas** saw a decrease in promoters by 33% and 47% respectively year-over-year, yet the swoosh maintained a consistent value, while the three stripes saw a 6% drop. **Puma's** AAV remained stable after a significant 121% increase in 2022. Their total AAV will be particularly interesting to evaluate at the end of the year considering their recent shifts in partnerships that include the end of the partnership with Israel's national football team, and new partnerships with Turkey's national team and football clubs in Algeria, Belarus, Denmark and England.

Notable Rank Climbers: Entertainment & Travel

In 2023, **Electronic Arts (EA)** and LaLiga announced an expansive new multi-year partnership for the 2023-24 season. This partnership influenced EA's debut in the top 10 this year, up from 20th last year. The popular YouTuber, DJ Mariio, who became one of the official voices for EA Sports FC 24 also contributed to EA's climb in value.

Qatar Airways debuted in the top 20 list last year at #12. As we predicted, they gained higher value in 2023 with more high-profile football deals, like the FIFA Women's World Cup. Their five year partnership with Formula 1 indicates only more growth yet to come.

Rank Drop Explained: Santander's Shift in Focus

Santander experienced a notable 13 spot drop from #6, with \$167M in AAV. The drop is attributed to decreased visibility on social media following the conclusion of their title sponsorships within the Premier League. Additionally, Santander's strategic shift toward esports, primarily focusing on the League of Legends championships and related events, is a move aimed at engaging a younger, digitally native audience.

Platforms Rank Removal Explainer:

In our brand ranking, we exclude platforms (like Instagram and TikTok) and games (like Fortnite) that function as platforms due to the way that their branding is picked up on content shared from their platforms by our computer vision.

To maintain the integrity and clarity of our ranking we focus only on brands whose value and impact can be measured without significant influence of watermarks from the original platform content was shared from.

Amazon Ranking Explainer:

Amazon's expansion into more sponsorship and media rights deals has led us to separate Amazon.com, AWS, and Prime, so there is no YoY comparison to last year.



So, how do you make *sense* of your social?





Start With a Single Post




HOW WE MEASURE SOCIAL

 **48,948** People Liked / 390 Commented
582,188 Impressions
11th Most Engaged post last 365

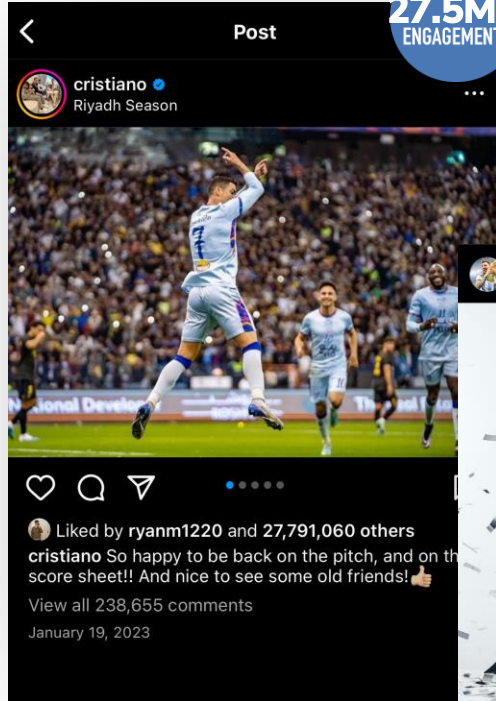
 **80% Male** // 45% Age 35-44 // 32% from US
MMA, Gambling, Family top interests

 **Logo** 1.8% Coverage // 62% Clarity // On Jersey
✓ Paid Partnership Tag
✓ In-Text Mention above the fold
✓ Campaign Hashtag above the fold
✓ Embedded Mention
✓ 0 Competition
✓ 80.9% Promotion Quality

 **\$6.5K** Adjusted Ad Value for Under Armour



Most Engaged Posts of 2023



27.5M ENGAGEMENTS

#1 Post
Cristiano Ronaldo's 1st match with Al Nassr FC
[LINK TO POST](#)

#3 Post

Leo Messi recaps the World Cup win.
[LINK TO POST](#)



23.2M ENGAGEMENTS

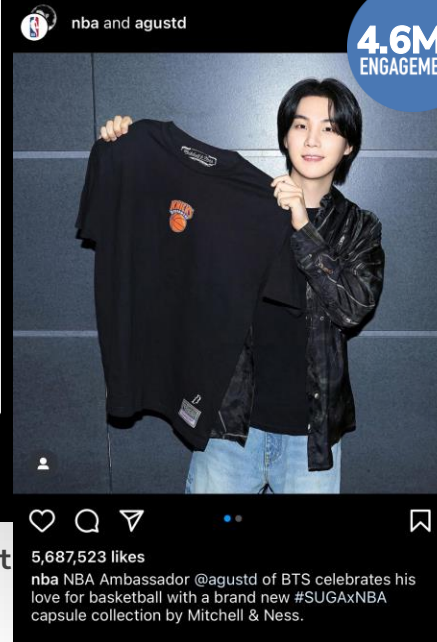
23,359,508 likes
leomessi Gracias a todos los que hicieron posible que ganara este premio. A todos los de la @afaseleccion, a mi familia y amigos, a los 45 millones de argentinos que confiaron en nosotros... Y felicidades a todas las ganadoras y ganadores de los @fifa The Best, especialmente a @lioscaloni y a @emi_martinez26 que tanto merecieron sus premios también. Un abrazo a todos, nos vemos pronto!!!



12.5M ENGAGEMENTS

#1 Non Global Football Post
Cricketer, Virat Kohli's personal post with wife.
[LINK TO POST](#)

#1 Basketball Post
NBA & BTS Partnership
[LINK TO POST](#)



4.6M ENGAGEMENTS

5,687,523 likes
nba NBA Ambassador @agustd of BTS celebrates his love for basketball with a brand new #SUGxNBA capsule collection by Mitchell & Ness.



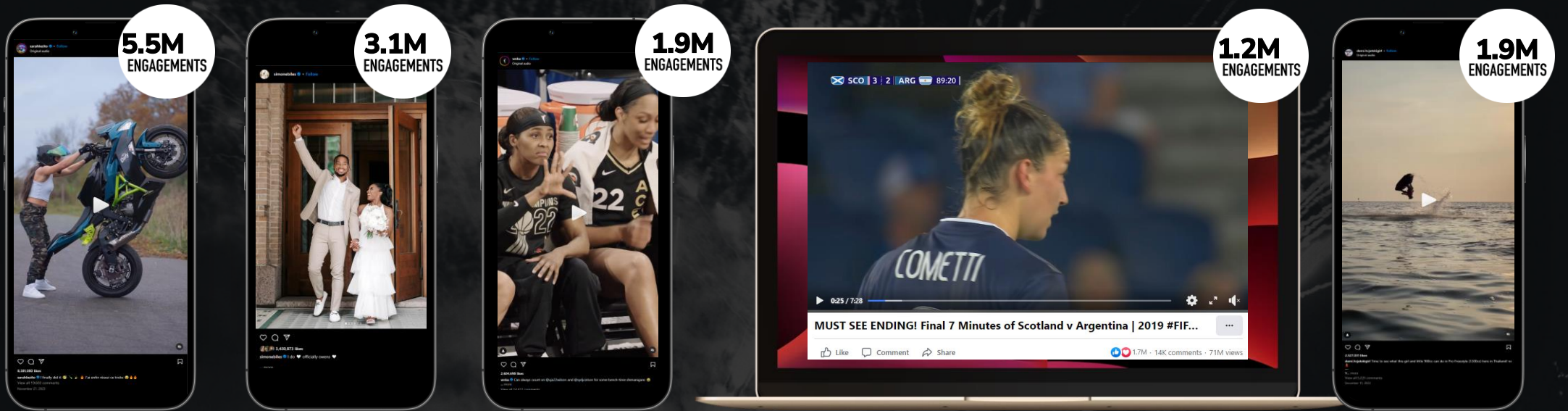
12.3M ENGAGEMENTS

#1 Team Post by Inter Miami
Inter Miami FC welcomes Lionel Messi.
[LINK TO POST](#)



Most Engaged Women's Sport Posts of 2023

The accounts of the top 14 women's sport posts have more than 1M followers. The account of the 15th top women's sport post (1.9M engagements) has less than 360k followers, proving that standout content can shine even without a massive audience.



#1 women's sport post

Sarah Lezito's post about a trick she landed.

[LINK TO POST](#)

#1 non-video women's sport post 3.1M engagements

Simone Biles' wedding announcement.

[LINK TO POST](#)

#1 Women's Basketball post

WNBA's post about A'ja Wilson & Sydney Colson at a Las Vegas Aces game

[LINK TO POST](#)

#1 Women's Global Football post

FIFA Women's World Cup post the Argentina v. Scotland match

[LINK TO POST](#)

Demi Morgan post before a competition in Thailand

[LINK TO POST](#)



Audience / Top 10 Total Fans By Entity

Instagram

Cristiano Ronaldo	622.9 Million
Lionel Messi	500.2 Million
Virat Kohli	266.7 Million
Neymar	219.8 Million
Lebron James	159.8 Million
Real Madrid CF	154 Million
FC Barcelona	126 Million
UCL	113.8 Million
Kylian Mbappe	112.4 Million
NBA	87 Million

15% of platform total

Facebook

Cristiano Ronaldo	168.9 Million
Lionel Messi	116.7 Million
Real Madrid CF	114 Million
FC Barcelona	103.5 Million
Neymar	92.1 Million
La Liga	79.5 Million
Manchester United	76.3 Million
UCL	71.6 Million
Bayern Munich	57.2 Million
Virat Kohli	51.5 Million

10% of platform total

Twitter

Cristiano Ronaldo	168.9 Million
Lionel Messi	116.7 Million
Real Madrid CF	114 Million
FC Barcelona	103.5 Million
Neymar	92.1 Million
La Liga	79.5 Million
Manchester United	76.3 Million
UCL	71.6 Million
Bayern Munich	57.2 Million
Virat Kohli	51.5 Million

10% of platform total

TikTok

PSG	41.4 Million
Real Madrid CF	40.2 Million
UCL	37.9 Million
Tottenham Hotspur	34.5 Million
FC Barcelona	32.9 Million
Neymar	32.2 Million
Juventus	31.4 Million
WWE	26.3 Million
La Liga	25.9 Million
Manchester United	24.8 Million

13% of platform total

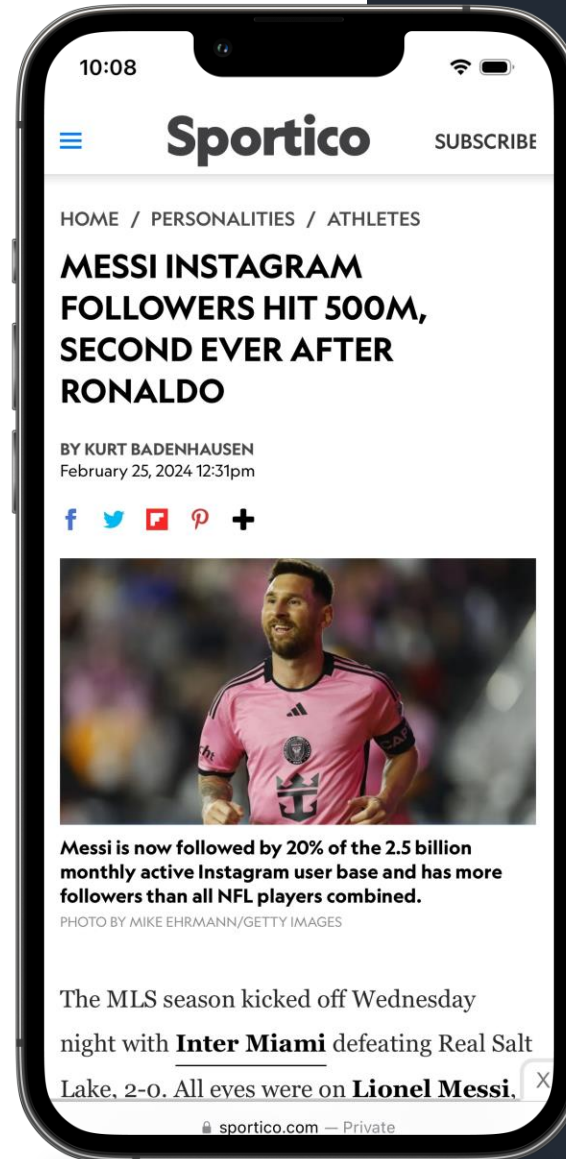


Top Entities Ranked by Followers

Ranking Explainers

🌟 Breaking Lionel Messi News Powered by KORE's Data

We understand the importance of timely data in the fast-paced world of social media. That's why while producing this report we updated our sports entity (athlete, team, league or event) ranking by followers on social media through March 1, 2024, to include Lionel Messi's remarkable achievement of 500 million Instagram followers. This update, in partnership with [Sportico's](#) coverage, ensures this report captures one of the most trending social media topics for 2024.



💡 500 million followers exceeds the TV audience (127 million, up 7% year-over-year) of the **2024 Super Bowl LVIII** by nearly four times.

🚀 Opportunity

Adding an elite athlete, influencer or rising star can radically improve your brands reach, visibility, credibility and ROI.

Request a **Rising Stars Athlete Ranking** to start your research in the right direction from: info@koresoftware.com



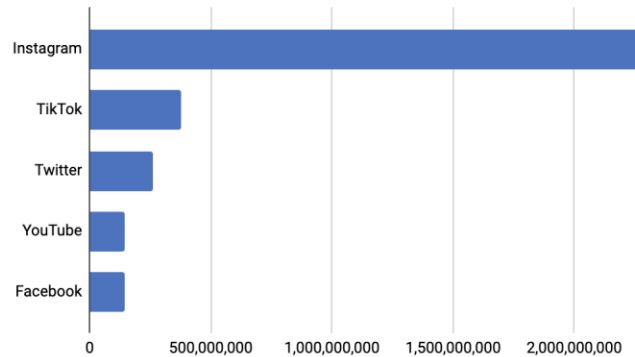
Audience / Growth

2.9 Billion

New Cumulative Sports Fans on Social

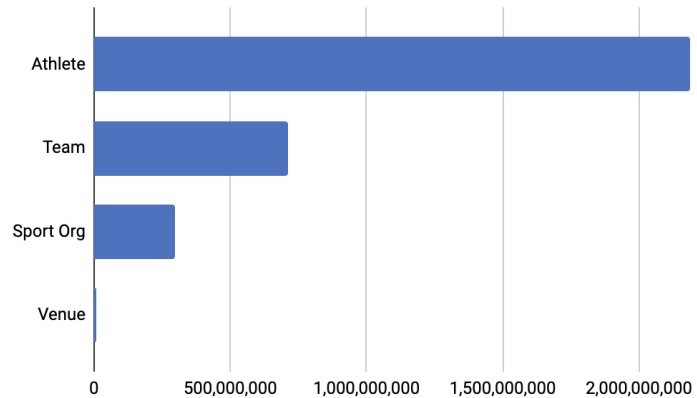
By Platform

71% Instagram



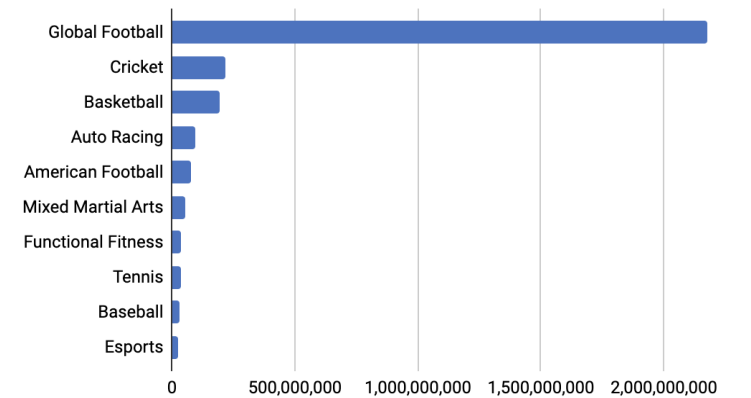
By Entity Type

68% Athlete



By Sport

68% Football

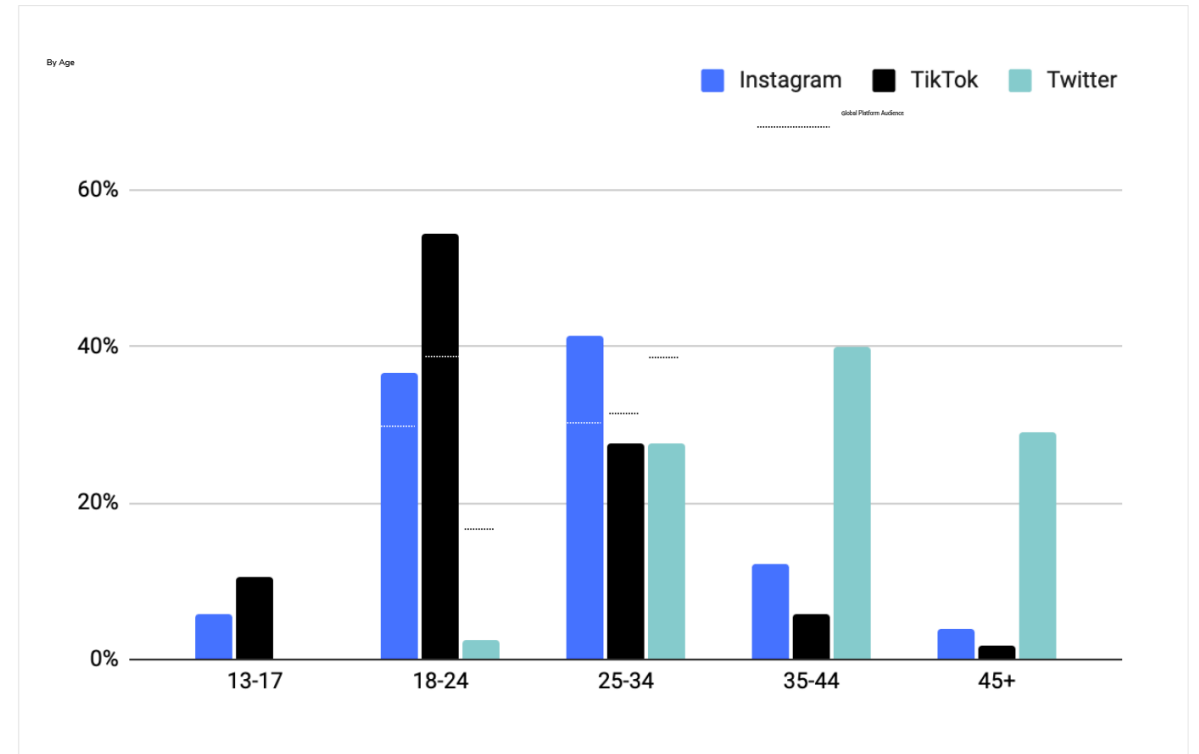
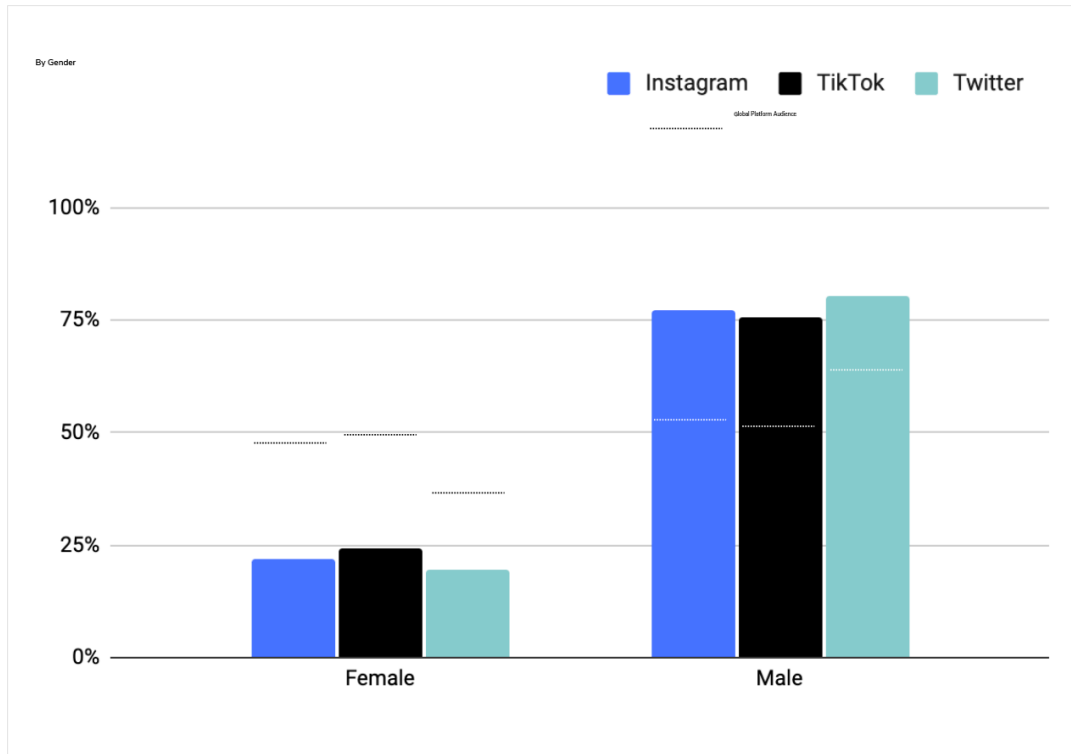




Audience / Demographics

78% Male, 67% 18-34 across all sport fans on Instagram, TikTok & Twitter

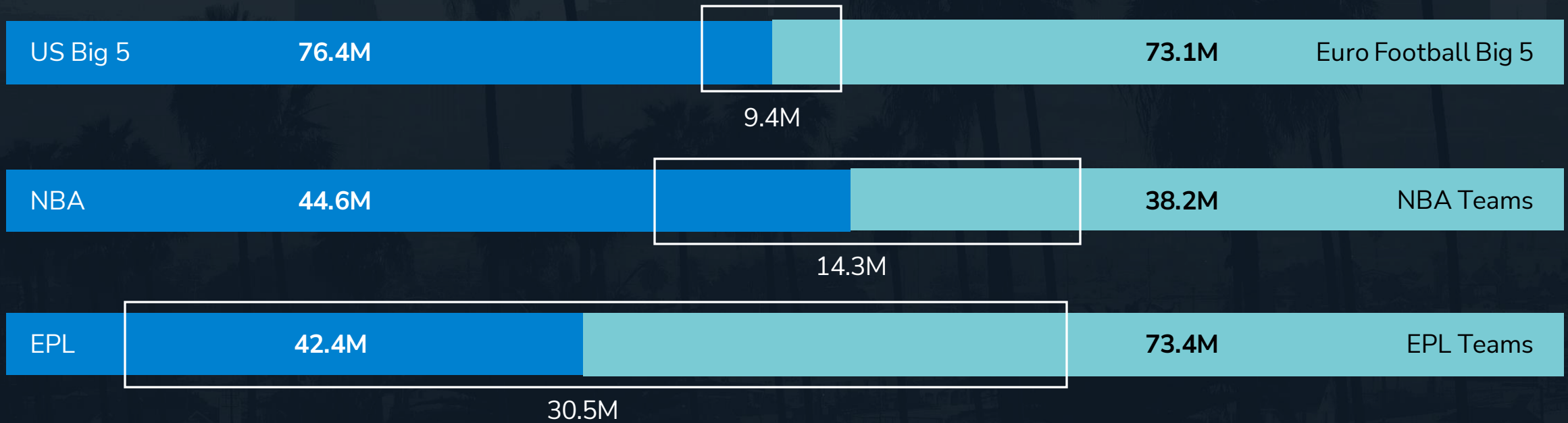
💡 Opportunity: Boost engagement by focusing on TikTok. For example, the Los Angeles Rams saw a 75% increase in engagement by doubling their TikTok posts in 2023. Qatar Airways' brand engagement was led by TikTok in 2023 after increasing their posts on the platform by 98%.





Audience / Overlap

12% fan overlap between the US Big 5 and Euro Football Big 5 Leagues.
54% fan overlap between the league and their teams on average.
 NBA & NFL have least overlap – only 33% of their fans also follow a team.





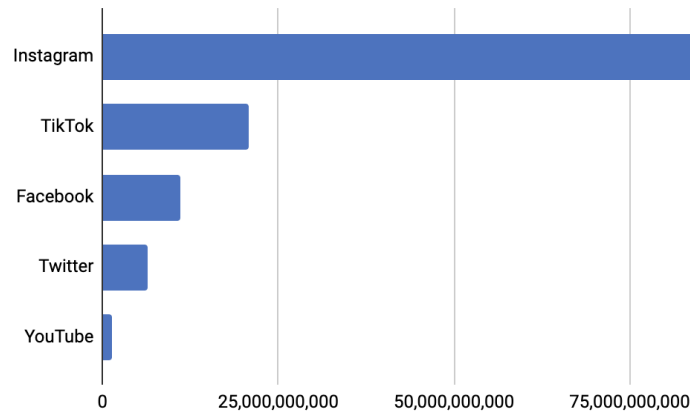
Fan Engagement / Engagement

111 Billion +10%

Engagements on Content from Sports Entities

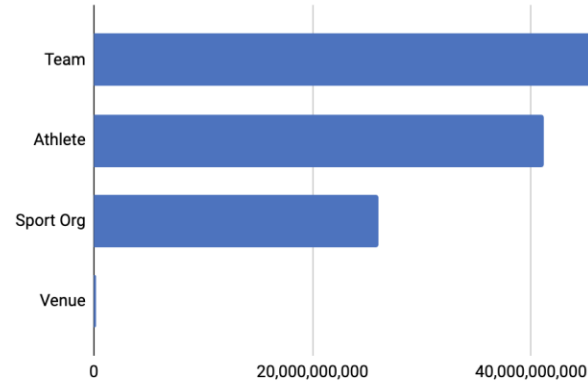
By Platform

68% Instagram



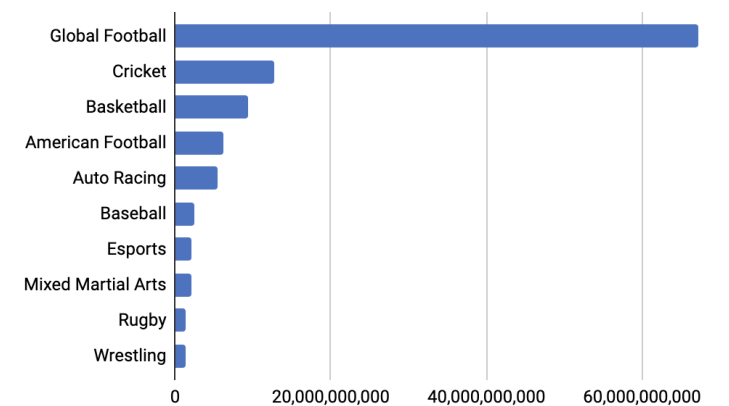
By Entity Type

45% Team



By Sport

54% Football





Fan Engagement / Top 10 Engagements By Entity

Instagram

Real Madrid CF	2,515,805,261
FC Barcelona	2,135,001,136
UCL	1,886,659,599
Cristiano Ronaldo	1,699,847,499
Lionel Messi	1,697,861,478
NBA	1,596,503,336
Formula 1	1,339,011,027
Galatasaray A.S.	1,298,063,185
RC Bangalore	1,292,989,061
Real Madrid CF	2,515,805,261

18% of platform total

TikTok

UCL	473,920,067
FC Barcelona	329,833,686
Real Madrid CF	329,374,458
WWE	233,704,784
Al Nassr FC	220,584,599
FIFA World Cup	215,031,597
NFL	214,730,488
Manchester City	208,382,229
Juventus	180,701,993
Chandler Hayden	160,787,920

12% of platform total

Facebook

Real Madrid CF	289,329,880
ICC	247,189,103
Cristiano Ronaldo	239,479,378
Manchester United	237,104,181
FC Barcelona	231,906,971
UCL	218,886,823
Manchester City	195,676,756
FIFA World Cup	165,701,084
EPL	161,299,668
Lionel Messi	156,621,376

19% of platform total

Twitter

Galatasaray A.S.	119,460,671
Real Madrid CF	101,030,915
FC Barcelona	97,272,077
Manchester United	94,368,548
UCL	87,766,165
Chelsea FC	72,234,254
Arsenal FC	70,707,386
Fenerbahce SK	69,808,753
Fc Barcelona ES	66,604,101
Formula 1	64,169,162

13% of platform total



Fan Engagement / Video Viewership

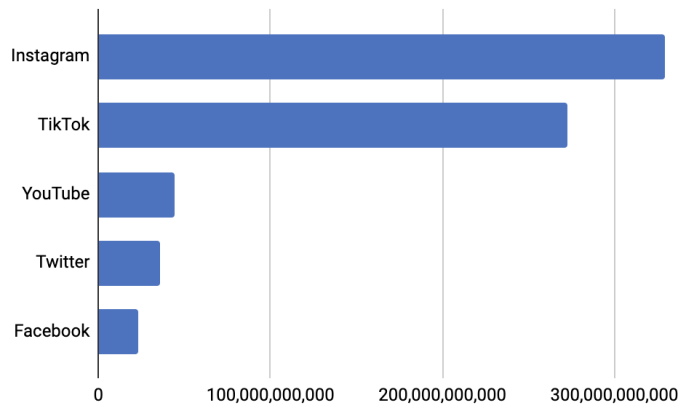
609.9 Billion +26%

Viewership on Video Content from Sports Entities

🚩 Noteworthy: Instagram and global football dominate total audience and engagement, while TikTok, despite smaller audiences, closely competes in video viewership, particularly in basketball and football. Viewership is evenly distributed across athletes, teams, and leagues.

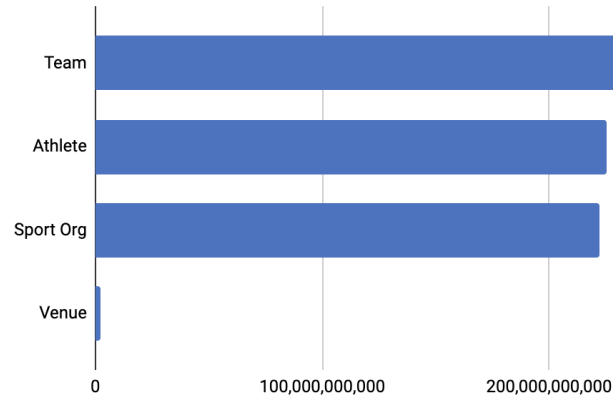
By Platform

47% Instagram



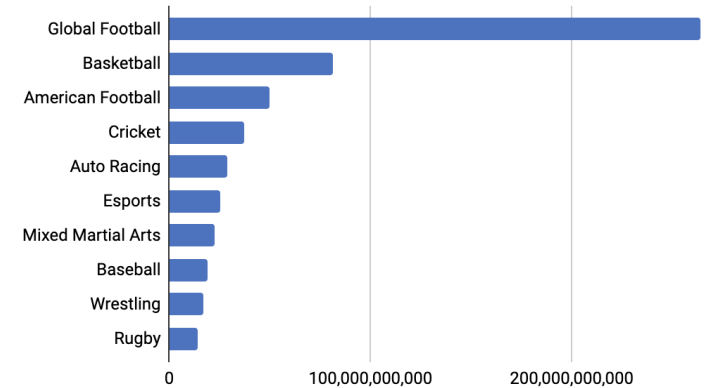
By Entity Type

36% Team



By Sport

37% Football



* Facebook Video Views only available on authenticated, represented by estimates



Fan Engagement / Top 10 Views By Entity

Instagram

NBA	12,940,033,588
UCL	9,114,242,366
Real Madrid CF	7,681,578,646
WWE	7,094,018,937
FC Barcelona	6,779,539,090
ICC	6,669,771,899
NFL	6,314,331,402
Formula 1	5,852,472,520
UFC	5,373,956,344
Manchester City	4,132,591,873

22% of platform total

TikTok

UCL	4,140,156,820
WWE	3,396,490,574
Real Madrid CF	2,680,705,079
FC Barcelona	2,645,527,780
Al Nassr FC	2,342,917,769
FIFA World Cup	2,330,475,761
NFL	2,299,827,367
Chandler Hayden	2,225,631,379
Manchester City	2,080,152,067
Juventus	1,853,161,703

29% of platform total

YouTube

WWE	3,626,041,155
EPL	1,552,679,164
NBA	1,398,045,608
UFC	1,340,661,383
NFL	1,019,953,537
FaZe Kay	846,737,661
Ali Sypher	842,454,707
ONE Championship	836,789,629
FIFA	816,874,730
Formula 1	682,198,619

10% of platform total

Twitter

NFL	2,211,102,233
NBA	1,930,430,583
MLB	810,058,417
WWE	655,683,722
UCL	651,864,724
UFC	411,763,681
MLS	401,882,612
Liverpool FC	365,152,506
EPL	353,335,196
PGA Tour	333,780,477

22% of platform total



Post Activity / Summary

Average Posts / Month	Athletes	Teams	Sport Orgs
Twitter	12	159	119
Facebook	10	86	70
Instagram	6	64	60
YouTube	10	22	41
TikTok	8	14	25



Conclusion & Key Takeaways

Let's break down our big review. Here are the most important learnings and ideas we've found.

- 1. Understanding Gaps:** Despite the importance of alignment, there's a persistent gap in understanding partner objectives, with 63% of brands feeling rights holders do not fully comprehend their goals.
- 2. Digital Dominance:** Brands are prioritizing digital and social assets, with women's sports and sports teams capturing significant interest for partnerships.
- 3. Measuring Impact:** Rights holders face challenges in impact measurement (58%), data sufficiency (42%), and clarity in partner objectives (33%).
- 4. Collaboration and Communication:** Improved measurement tools, frequent data sharing, and enhanced reporting are cited as primary ways to bolster partnerships.
- 5. Selective Partnerships:** There's an observed trend towards more focused and strategic partnerships, with brands choosing partners that align closely with their values and deliver measurable success.
- 6. Social Engagement:** Social media continues to be a pivotal space for brand exposure, with video content demand surging and indicating a preference for quality over quantity in postings.



Sectors we're watching

Request Data & Insights!

We'd love to help you better understand how your organization is performing against industry benchmarks. Below is list, but not limited to, of shorter sector or subsector industry market reports you can request.

- **Automotive**
- **Healthcare**
- **Financial**
- **Technology**
- **Food & beverage**
- **CPG**

These condensed reports will cover:

- **Industry patterns**
- **General sponsorship spend data**
- **Social media trends**
- **Types of assets being used**
- **Who and what is driving the most value**

If you'd like to request data on your own sector, reach out to info@koresoftware.com and our team can set up a time to learn more.

About KORE

At KORE we're more than just a global leader in the sponsorship technology space; we're architects of connection. KORE delivers a connected ecosystem of solutions that span engagement marketing, management, and data intelligence. With expertise honed for over 23 years and trusted by over 900 leading brands and agencies worldwide, we facilitate over \$5B in transactions annually, empowering our clients with the data and tools necessary for creating more powerful partnerships.

For more insights, [set up a demo](#) to learn more or contact us at info@koresoftware.com.





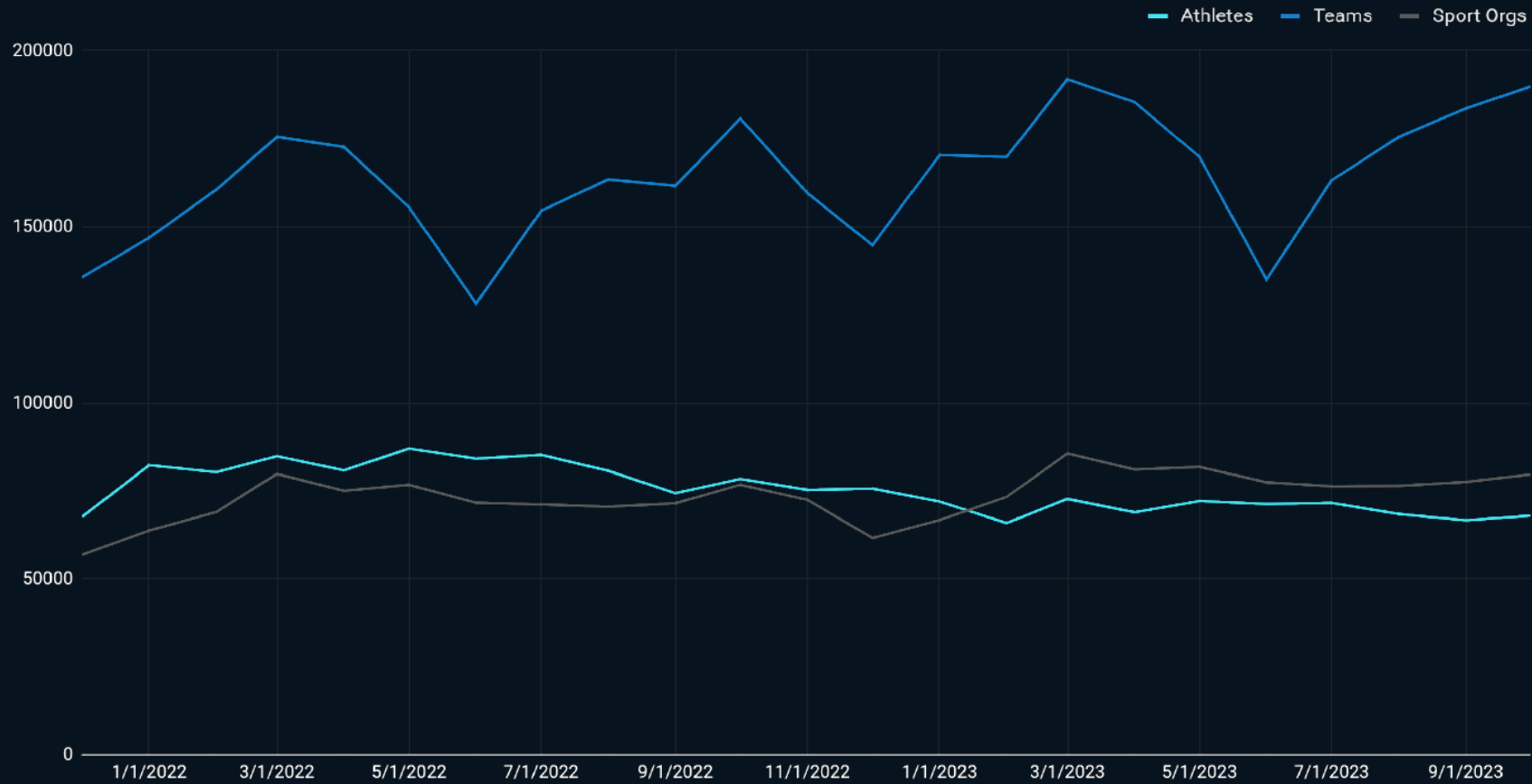
Bonus Content / Top 10,000 Post Analysis

The top 10,000 Posts by engagement account for .05% of total posts, but 18% of the total engagement by all 20.4M posts by athletes, teams and sport orgs in the last year.

- 82% of the posts & engagement are on Instagram
- 38% of engagement from Albums, 32% from Short Vertical Video
- 59% of engagement is from Athletes, 46% of posts
- 73% of engagement from Football, 70% of posts
- 47% of engagement from top 10 (of 709) entities

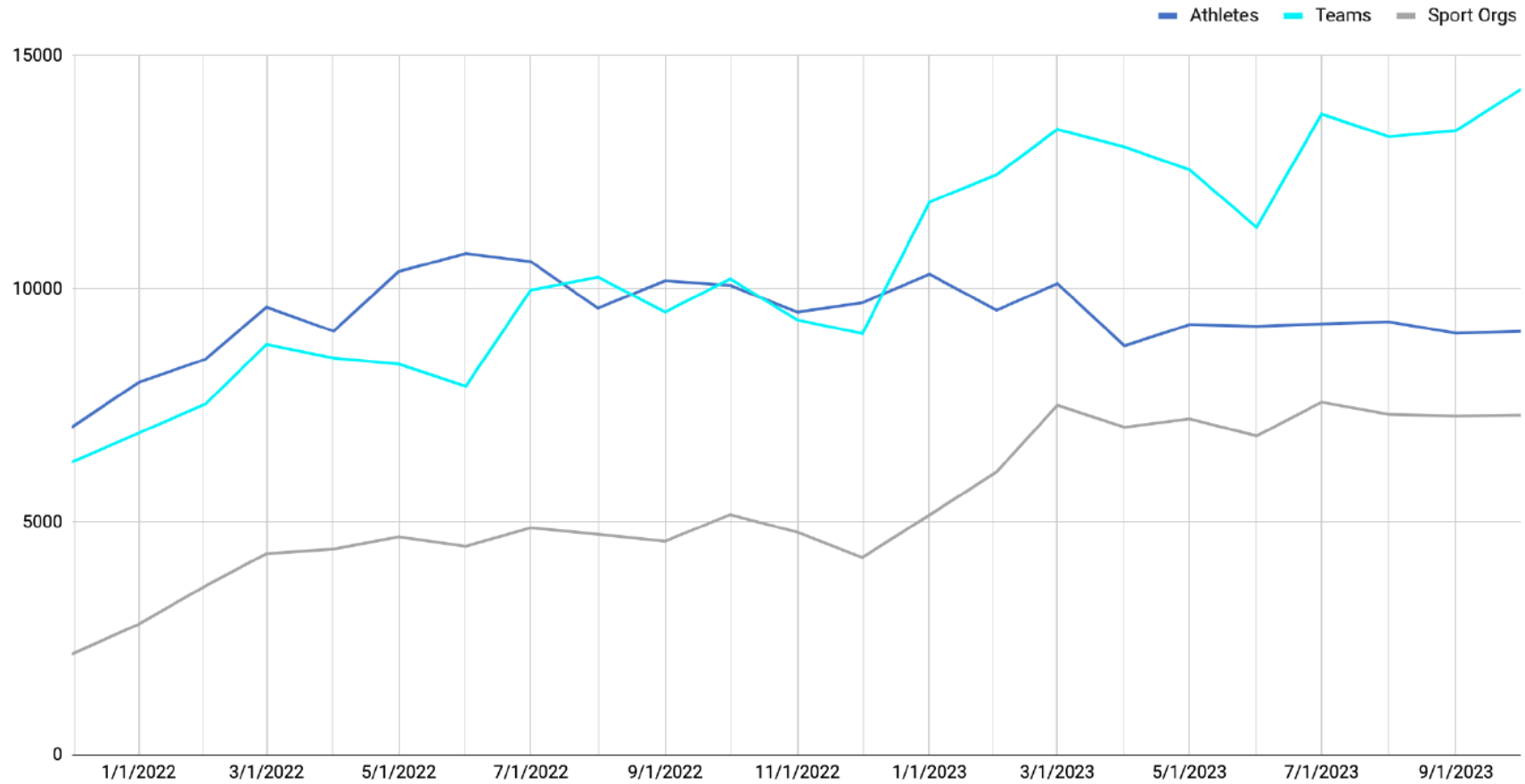


Post Activity / Instagram



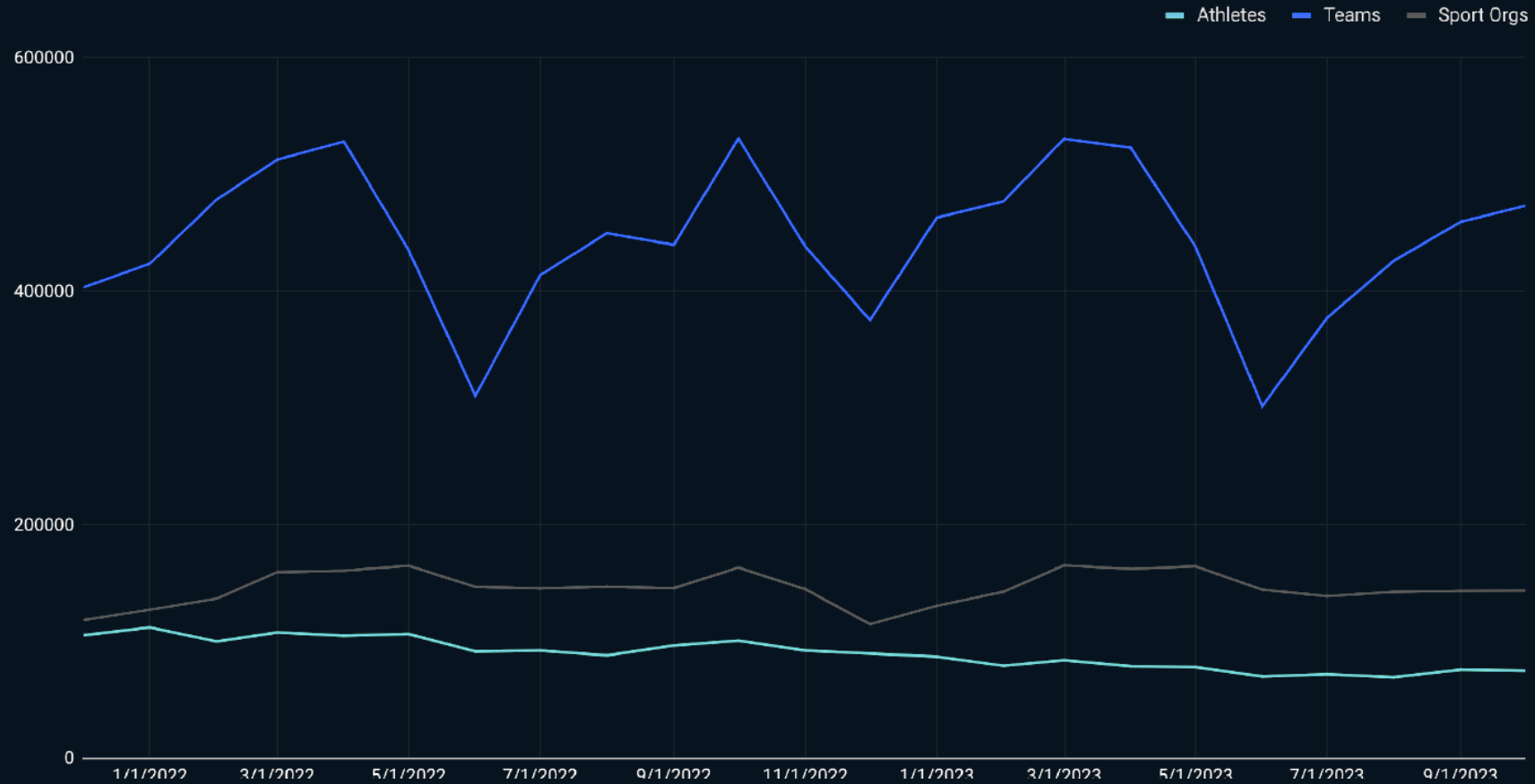


Post Activity / TikTok



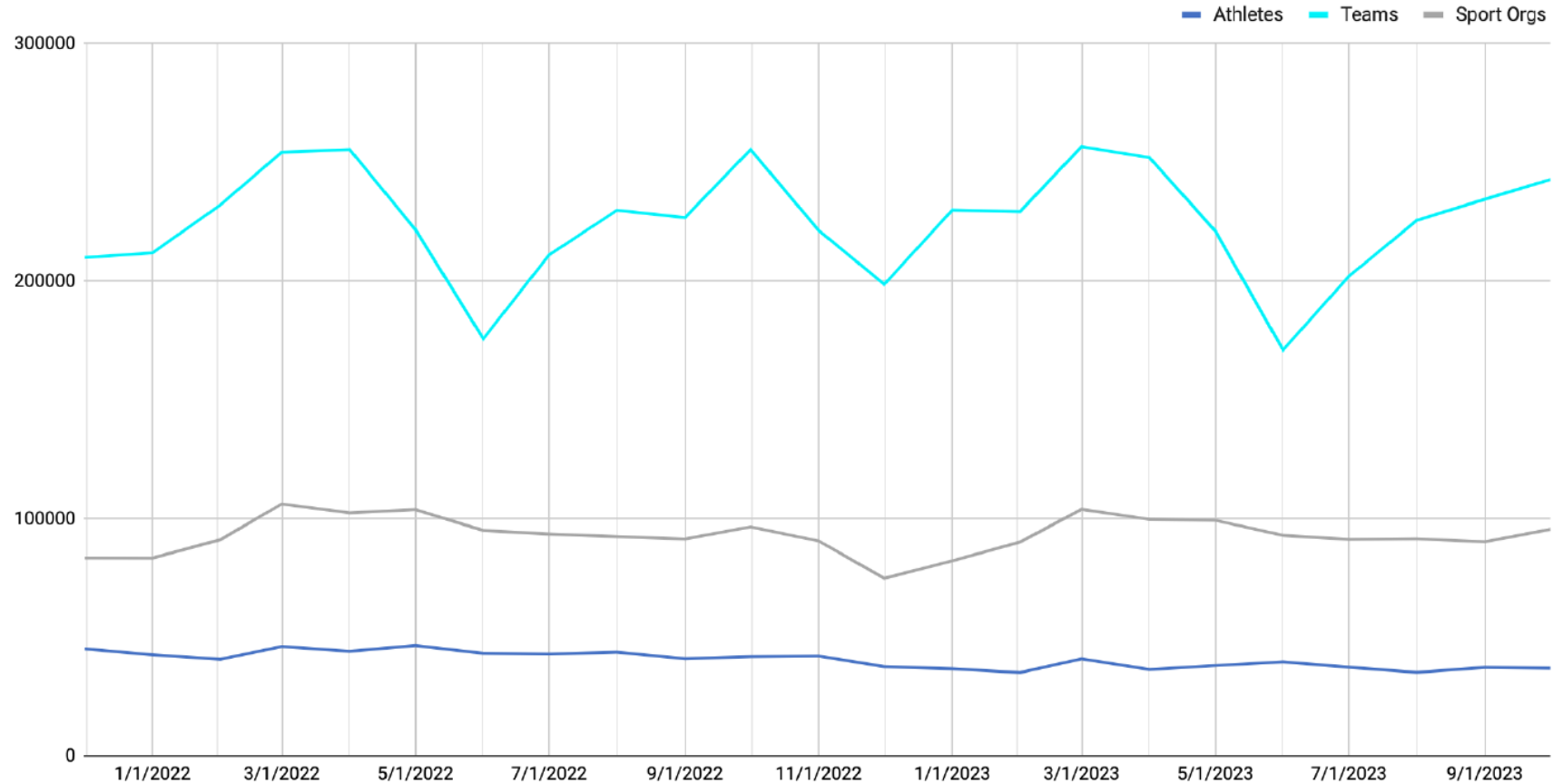


Post Activity / Twitter





Post Activity / Facebook





Post Activity / YouTube

