

# Sponsorships & Sports Marketing - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the sports sponsorship market
- How sports fans engage with and follow sports and how to cultivate fandom
- Breaking through the crowded sports sponsorship landscape
- The opportunities for brands when choosing what type of sports sponsorship is right for them
- Examples of successful sports sponsorship activations
- The impact of sports sponsorships on fans' purchase behavior and brand affinity

Half of sports fans consider their favorite sports teams to be part of their personal identity, demonstrating just how deep fans' passion for sports runs. That connection can carry over and improve consumer affinity for brands that partner with those teams, as nearly half of fans like a brand more simply by that brand appearing on the jersey of their favorite team.

Sports sponsorship, like many parts of the sports industry, faced unprecedented challenges due to the COVID-19 pandemic. According to IEG data, an estimated \$14 billion in sponsorship value went unrealized in 2020, through canceled games and lack of impressions from fans in attendance. In 2021 and heading into 2022, demand is up from brands for sports inventory and marketing campaigns, and interest is unlikely to decrease anytime soon. Brands still understand the power and allure sports offers for consumers around the country and across demographic groups.

However, nearly two in five sports fans are looking to cut back their spending on sports as well as sports merchandise. With a notable share of fans focused on saving money, sports partnerships with activations in the form of physical items and experiences need to prove their value to fans even more.



"Sports sponsorship opportunities remain in high demand from brands and advertisers. Sports fans present a massive audience of deeply engaged consumers, well suited for brand integration and marketing."

- Colin O'Brien, Sports Analyst

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Sponsorships & Sports Marketing - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

While sports sponsorship has been disrupted over the past couple of years, the sports betting industry has seen tremendous growth over the same period, both from a consumer perspective and from a sports marketing perspective. Sports betting was a long dormant, untapped sports marketing industry simply waiting to be sanctioned. Now that it is permissible, all corners of the sports industry have gotten involved.



### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- What you need to know
- This Report looks at the following areas
- Definition
- Market context
- COVID-19: US context
- Economic and other assumptions

### EXECUTIVE SUMMARY

- Top takeaways
- COVID-19 created new inventory and sparked creativity among brand activations
- Television remains the number one method fans use to follow sports, with digital continuing to grow in importance
- The sports halo effect demonstrates the power of sports sponsorships

- Market overview

Figure 1: Sports fandom, by sport, 2021 vs 2020

Figure 2: Sports sponsorship and industry outlook, 2022-27

- Opportunities and challenges
- Sports betting offers a new, rapidly growing industry in sports sponsorships
- NIL creates new possibilities for college sponsorship, especially for female athletes

Figure 3: Female NIL partnerships

- Sports sponsorships should embrace ethical components
- Key consumer insights
- Gen Z fandom is a critical focal point across sports

Figure 4: Sports fandom, select methods for following sports, select social media platforms used, by generations, 2021

### THE SPORTS MARKET

- Market overview

Figure 5: Sports fandom, by sport, 2021 vs 2020

- The ethos of sports fandom

Figure 6: Sports fandom passion, 2021

### MARKET FACTORS

- Sports betting is the hottest new industry in sports
- Sports content is a key opportunity for sports betting partnerships
- Brand partnerships can help sportsbooks attract new users

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 7: Bud Light sponsored bet on FanDuel Sportsbook

- **The pandemic created new inventory – and concerns – for brands**
- **COVID-19 sparked creativity for sports activations**
- **Sports sponsorships should embrace ethical components**

Figure 8: New Jersey Devils, Prudential Buy Black campaign

- **Sustainability continues to be a focal point**

Figure 9: Tide cold water laundry NFL initiative

## COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Utilize star power in a variety of ways**

Figure 10: Sports halo effect – Impact on purchase behavior, by generation, 2021

Figure 11: LeBron James Ruffles ad

- **Tom Brady ups his game off the field**

Figure 12: Tom Brady Subway ad

- **NIL created limitless possibilities for new college sponsorship**

Figure 13: Local NIL dentist ad

- **Major brands choose women for inaugural NIL deal**

Figure 14: Female NIL partnerships

- **Enhanced brand activations look to elevate fans' in-person, pre-game experience**

- **Fans look to take care of their body like the pros**

Figure 15: Take care of body like athletes, by generation, 2021

Figure 16: Wellbeing products proof of efficacy through sports

## THE SPORTS FAN: TOP TEN FAST FACTS

### EXPLORING SPORTS FANS

- **Greater women's sports investment contributes to increases in female fandom**

Figure 17: Sports fandom, by sport, by gender, 2021 and change vs 2020

- **Gen Z fandom remains a focal point across sports**

Figure 18: Sports fandom, by sport, by generation, 2021 and change vs 2020

- **Continue to promote underrepresented demographics in sports**

Figure 19: Sports fandom, by sport, by race and Hispanic origin, 2021 and change vs 2020

- **Offer ways to teach consumers about sports to showcase the fun and excitement of games**

Figure 20: Barriers to sports fandom, 2021 vs 2020

Figure 21: Barriers to sports fandom, by generation, 2021

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## FOLLOWING THE ACTION ON THE FIELD

- **Television remains dominant method to follow sports but digital provides additional channels for mass reach and multiple touchpoints**

Figure 22: Methods for following sports, by year, 2021 vs 2020

Figure 23: Methods for following sports, by generation, 2021 vs 2020

Figure 24: Multichannel use while following sports, by generation, 2021

- **Social media's importance to sports fans continues to grow**
- **Social media benefits for following sports**

Figure 25: Top three reasons for using social media to follow sports, 2021

- **Social media platforms used to follow sports**

Figure 26: Social media platforms used to follow sports, 2021 vs 2020

Figure 27: Social media platforms used to follow sports, by gender and select generations, 2021

## CULTIVATING FANDOM

- **The sports halo effect illuminates value of sports partnerships**

Figure 28: Sports halo effect on personal identity and brand affinity, by gender and generation, 2021

Figure 29: Sports halo effect – Purchase behavior, by generation, 2021

- **Sports offer brands from all industries great opportunities to engage fans**

Figure 30: Marketing in sports, by generation, 2021

- **Food and drink**

Figure 31: Dallas Cowboys Miller LiteHouse tailgate experience

- **Clothing and accessories**

Figure 32: Ralph Lauren MLB collection

- **Entertainment**

- **Gaming**

Figure 33: Ancillary games, by gender and generation, 2021

Figure 34: Pacifico Tony Hawk livestream

- **Fans are looking to cut back sports spend**

Figure 35: Fans cutting back sports spend, by generation, 2021

## MARKETING TO CREATE A LASTING IMPACT

- **Breaking through to sports fans**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 36: Sports marketing, 2021 vs 2020

Figure 37: Jimmy Kimmel LA Bowl

- **Jersey sponsorship provides increases in visibility and brand affinity**
- **A linked component of partnership can create memorability**

Figure 38: Sponsorship connections between brand and sports entity

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.