

BACKGOUND ROUND

WHAT IS SPONSOR FRIENDLINESS?

Tracked historically in rEvolution's studies, "sponsor friendliness" is a series of questions to measure tribe and reward attitudes, such as the impact of the sponsorship on brand opinion and purchase intent, along with agreement statements about the property. For brands, this index is seen as the efficiency of a sponsorship.

rEvolution designed a custom study to measure "sponsor friendliness" among 25 traditional and emerging sports across the U.S. and UK, producing rEvolution's Sponsor Ranking. The Ranking has since been published in partnership with SportsBusiness Journal.



IMPACT ON BRAND OPINION



IMPACT ON PURCHASE INTENT



AGREEMENT STATEMENTS:

SUPPORT SPONSORS' PRODUCTS, FEEL SHARED INTEREST, VIEW THEM AS LEADERS

REACH  **EFFICIENCY**

Interest

Sponsor Friendliness

 **TOTAL SCORE**

HOW WAS THE SPONSOR RANKING PRODUCED?

Interest of the sport was included as a measure of reach. Ideally, the sport will be both extremely popular and sponsor friendly, though typically it scores high in one category and not the other.

Using both reach and efficiency as factors, the result is rEvolution's Sponsor Ranking.

METHODOLOGY

Two surveys were distributed and hosted online by Ipsos.

Benchmark survey

- Deployed on market-specific omnibuses to measure interest
- Sample of n=1,000 per country (U.S. & UK)
- Field dates: 2/17/20 (U.S.); 3/10/20 (UK)

Sponsor friendliness survey

- Targeted to fans interested in pre-defined list of sports, balanced on demos
- Sample of n=1,000 per country (U.S. & UK)
- Field dates: 12/16/19–12/23/19

HOW WERE SPORTS CLASSIFIED?

	EMERGING	TRADITIONAL
U.S.	Esports Rugby EPL MMA Lacrosse Women's Soccer/ NWSL	MLB NFL NBA NHL MLS NASCAR Golf/PGA Tennis/ATP
UK	Esports Formula E MLB NFL Women's Soccer/ WSL	Cricket Formula 1 Rugby/Union EPL Tennis/ATP Golf/PGA



WHICH PROPERTY IS THE MOST SPONSOR FRIENDLY?

Women's soccer is the most sponsor friendly overall. Along with having the highest scores on brand opinion and purchase intent, it also has the highest proportion of fans who stated they agree that its sponsors have a shared interest, believe the sport cannot exist without the support of sponsors and have a positive impression of sponsors.

On average, emerging sports are more sponsor friendly than traditional. As sports begin to grow, the "first fans in" are the most avid and sponsor friendly. At a certain point in its growth curve, a sport will inevitably start to attract more casual fans, which will begin to dilute its sponsor friendliness.



WHICH PROPERTY IS THE HIGHEST RANKED?

Factoring in both reach and efficiency, the NFL's enormous popularity more than compensates for its weaker sponsor friendliness, making it the best buy for sponsors with national reach, deep pockets and broad target markets.

However, for brands with more niche audiences and smaller budgets, emerging sports, such as women's soccer and esports, represent a better value.



INDUSTRY TRENDS

THE NFL REMAINS POSITIONED FOR GROWTH, WHILE NASCAR AND THE PGA MAY HAVE AN ISSUE

When asked which sport was most likely to grow its popularity in the next five years, the NFL is cited the highest at 18%, though growth expectations for women's soccer and esports are not far behind, each at 13%. In contrast, NASCAR and the PGA are traditional sports that "net negative," meaning more fans believe they will suffer a downturn than gain momentum.

MMA MAY HAVE GREATER REACH, BUT WOMEN'S SOCCER GETS MORE BUZZ

The MMA audience is broadening to nearly one in five, making it the leading emerging sport and giving traditional sports, such as NASCAR, golf and tennis, a run for their money. Women's soccer edges out MMA and esports as the most buzzworthy emerging sport and is second only to the NFL in terms of the sport most likely to grow its appeal over the next five years.

THE NFL AND NASCAR ARE SEEN AS THE MOST EFFECTIVE SPORTS FOR PROMOTING BRANDS, BUT EMERGING SPORTS ARE COMPETITIVE WITH OTHER TRADITIONAL SPORTS

Between the NFL's tenure as the most popular and NASCAR's vehicles as flying billboards, their respective fan bases perceive them as effective platforms for sponsor promotion. Outside of the NFL and NASCAR, there is little distinction in effectiveness between the emerging sports and the other traditional sports.



WHICH PROPERTY IS THE MOST SPONSOR FRIENDLY?

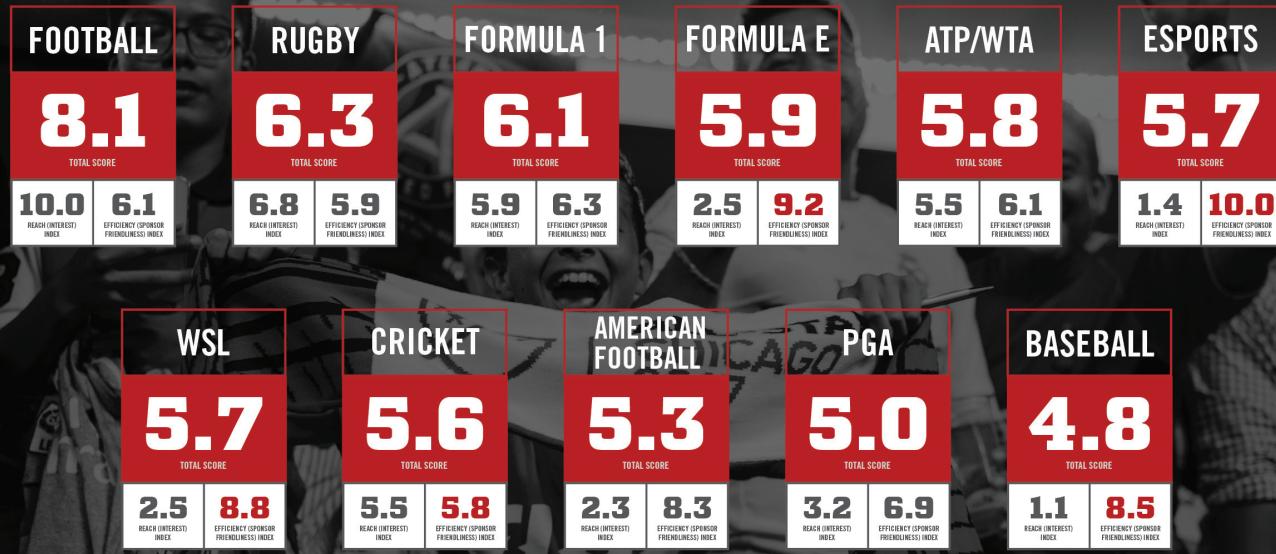
Sports is the most sponsor friendly overall. It has the highest proportion of fans who stated they agree that its sponsors have a shared interest, believe the sport cannot exist without the support of sponsors, have a positive impression of sponsors, believe their brands are for me and my family, would want to learn more and are likely to recommend. Esports fans also noted a strong impact on brand opinion and purchase intent.

On average, emerging sports are more sponsor friendly than traditional. Emerging sports tend to attract avid fans, resulting in a higher proportion than traditional sports.

WHICH PROPERTY IS THE HIGHEST RANKED?

Factoring in both reach and efficiency, football's enormous popularity more than compensates for its weaker sponsor friendliness, making it the best buy for sponsors with national reach, deep pockets and broad target markets.

However, for brands with more niche audiences and smaller budgets, emerging sports, such as Formula E and esports, represent a better value.



INDUSTRY TRENDS

FOOTBALL IS PERCEIVED AS THE SPORT THAT HAS DONE THE BEST JOB OF POSITIONING ITSELF ON A GLOBAL STAGE BY A LARGE MARGIN

F1 is the second ranked, but football outperforms it by a margin of 2:1. This may reflect its recent trend of moving away from traditional nations to new markets in Asia and Eastern Europe.

WOMEN'S FOOTBALL IS BY FAR THE MOST BUZZWORTHY EMERGING SPORT

When asked which emerging sport they hear the most about in the media and from friends, women's football is three times more likely to be mentioned than the next sport, American football. Women's football is expected to have the biggest growth curve, while F1 is viewed as most likely to suffer a downturn.

FOOTBALL IS ALSO SEEN AS THE MOST EFFECTIVE SPORT FOR PROMOTING BRANDS, BUT EMERGING SPORTS MATCH MOST OTHER TRADITIONAL SPORTS

With the prominence of sponsors in football and F1, the two properties are viewed as the most effective sports at promoting sponsors. Not including football and F1, emerging sports are perceived equally to traditional sports at effectively promoting their sponsors.