

# State of the Market

## Marketing Partnerships Report







## About SponsorUnited

Launched in 2018, SponsorUnited is the leading global sports and entertainment intelligence platform, delivering actionable data and insights to build stronger marketing partnerships. We provide unrivaled knowledge across the sponsorship and media landscape so our clients can make impactful decisions that drive business.

With over 360,000 brands, 1.8 million deals, and 16.9 million data points across sports, entertainment, media, and talent, our SaaS database enables brands, rights holders, and agencies to partner more effectively. By delivering real-time trends, on-demand research, and the most comprehensive data available, we connect the entire sponsorship ecosystem and are rewriting the partnership playbook.

SponsorUnited was ranked on the Inc. 5000—the most prestigious list of the fastest-growing private companies in America—in both 2022 and 2023. Visit <https://sponsorunited.com/> to learn more and discover exclusive data and insights to make intelligent partnership decisions at speed and scale.



# Introduction

Sponsorship in major markets has evolved rapidly, reflecting broader industry trends and shifting consumer dynamics. Examining key markets is crucial for brands to maximize the impact of their sponsorship dollars, as major cities offer unparalleled visibility and engagement opportunities due to large, diverse populations and vibrant sports cultures. Understanding the nuances of each market allows brands to tailor their partnership strategies, whether they are involved in the key markets featured in this report— New York City, Los Angeles, Chicago, Austin, Las Vegas, Charlotte, Toronto, London, and Madrid—or want to better leverage the unique assets and fan bases of their own markets.

In our first ever State of the Market report, we explore the intricacies of sponsorship across nine major cities, revealing how leading brands like Ticketmaster, Toyota, Bud Light, and Verizon dominate the scene with substantial investments and strategic partnerships. From the high average deal sizes in Los Angeles to the community-focused sponsorships in Austin, the report highlights the varied approaches and emerging trends that define the sponsorship landscape. The analysis also covers the rise of women's sports sponsorships in London and the unique strategies of local brands in some markets, offering a comprehensive view of current and future opportunities for brands.

With an average deal size of \$935K across major pro sports organizations in the seven North American markets, we're excited to present our State of the Market report. This comprehensive analysis provides brands with the insights needed to navigate and capitalize on the diverse and dynamic sponsorship landscapes of key markets, ensuring they are able to enhance their own market presence and connect with audiences in innovative ways. Authored by SponsorUnited's Marketing, Research, and Analytics teams, the report encompasses more than 3,200 brands and 220 unique assets from January 1, 2023 to June 5, 2024.

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# Key Findings

1

The average team sponsorship deal size across all organizations in the seven featured markets in North American major pro sports—NYC, LA, Chicago, Austin, Vegas, Charlotte, and Toronto—was nearly \$935K last year, ranging from a \$414K average deal size in Austin to an average of \$1.1M in Los Angeles. The average number of sponsorships per team in these seven cities is 72 deals, with the Vegas Golden Knights, New York Yankees, and Toronto Raptors leading with the highest number of deals.

2

Ticketmaster, Toyota, Bud Light, Verizon, Coca-Cola, Hyundai Motor, adidas, American Express, Ford Motor Company, and Pepsi are some of the brands that have established the strongest sponsorship presence across the nine featured markets, and each of these brands has more than 100 total sponsorship assets. The top categories for sponsorships include alcohol, finance, auto, healthcare, non-alcoholic beverage, food products, and technology, accounting for over 50% of all brands.

3

Verizon dominates New York City's sponsorship landscape with over 110 total sponsorship assets, leveraging its advanced 5G solutions to boost fan engagement and connectivity. A prime example of this dominance is the brand's role in various pro sports venues—including MetLife Stadium and Prudential Center—where Verizon enhances the venue and fan experiences through wireless connectivity. This strategy highlights how technology companies can transform sports sponsorships by integrating high-tech services that elevate both operational effectiveness and fan interaction.

4

Local brands lead the sponsorship scene in Austin, where five of the top six sponsors are based in the city. Sponsorships from these local brands emphasize community support. For example, the collaboration between St. David's Healthcare and Austin FC includes initiatives that provide opportunities for underserved schools and youth in Central Texas, demonstrating the powerful community impact of local sponsorships.

5

Auto brands leverage sponsorship opportunities in Los Angeles far more often than in other markets, with an average of 13 sponsorship assets per deal in LA compared to the national average of nearly four deals. Toyota and Honda, for instance, heavily invest in sports sponsorships in Los Angeles to maximize market penetration and enhance visibility, aligning with the region's leadership in electric vehicle sales and high consumer demand for cars.

6

The sponsorship landscape for women's sports is on the rise in London, with a 35% increase in deals reflecting the growing value of dual-team sponsorships. Brands such as Betway and Electronic Arts maximize their market reach and fan engagement by partnering with both men's and women's teams. This trend highlights the increasing importance of gender equity in sports sponsorship strategies.



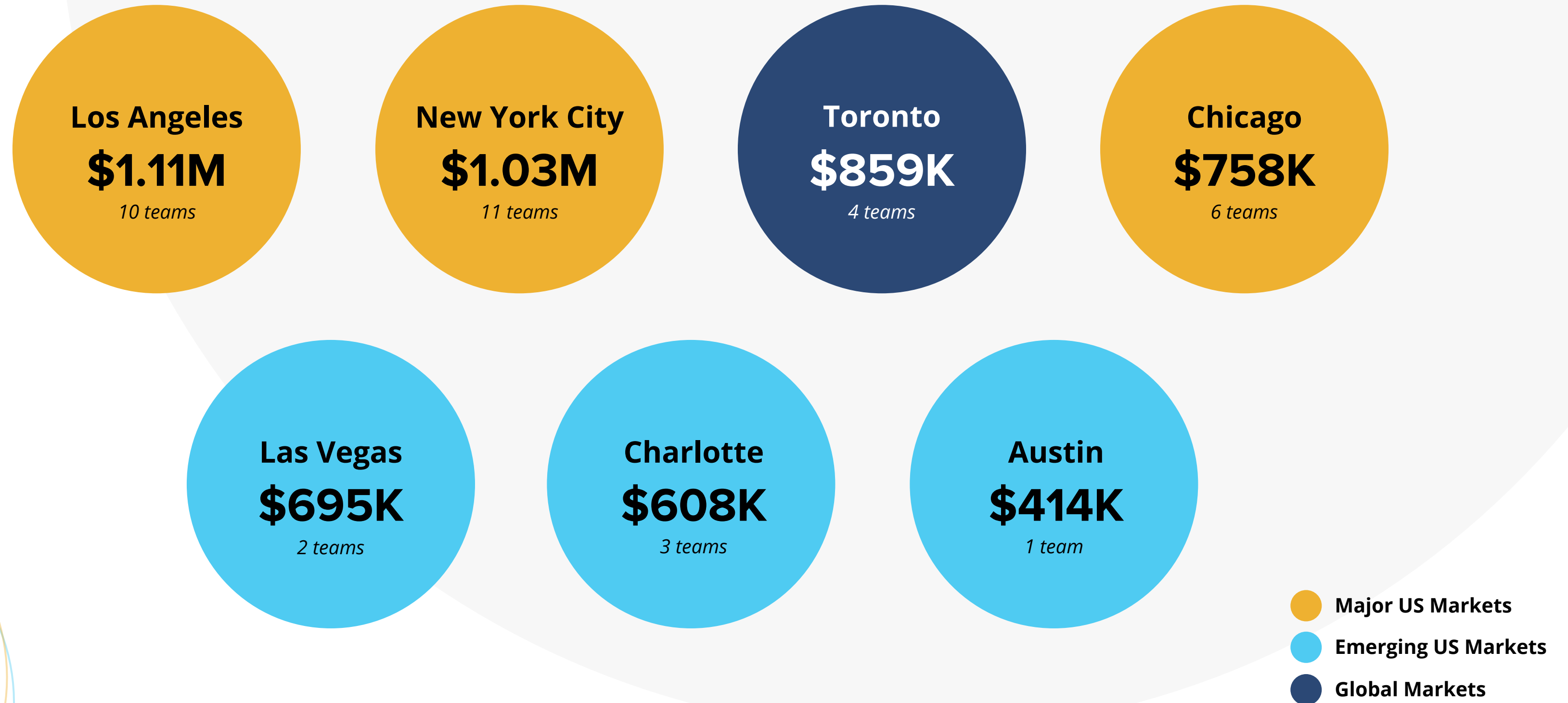
# Most Active Category for Top 25 US Cities

Ranked by population

1 <b>New York City, NY</b> Banking	6 <b>Philadelphia, PA</b> Banking	11 <b>Austin, TX</b> Beer (US)	16 <b>San Francisco, CA</b> Athletic Apparel & Footwear	21 <b>Washington, DC</b> Banking
2 <b>Los Angeles, CA</b> Car Manufacturers (Non-US)	7 <b>San Antonio, TX</b> Banking	12 <b>Jacksonville, FL</b> Dealership	17 <b>Indianapolis, IN</b> Banking	22 <b>Nashville, TN</b> Restaurants & Events
3 <b>Chicago, IL</b> Banking	8 <b>San Diego, CA</b> Restaurants & Events	13 <b>Fort Worth, TX</b> Restaurants & Events	18 <b>Seattle, WA</b> Banking	23 <b>Detroit, MI</b> Beer (US)
4 <b>Houston, TX</b> Restaurants & Events	9 <b>Dallas, TX</b> Banking	14 <b>Columbus, OH</b> Investment Services	19 <b>Denver, CO</b> Hotel & Resort	24 <b>Memphis, TN</b> Athletic Apparel & Footwear
5 <b>Phoenix, AZ</b> Beer (US)	10 <b>San Jose, CA</b> Software	15 <b>Charlotte, NC</b> Banking	20 <b>Las Vegas, NV</b> Casinos, Race Tracks & Gaming	25 <b>Portland, OR</b> Hotel & Resort

# Team Sponsorship Revenue Across Major Pro Sports

Average deal amount for featured North American markets





# Major Market **NEW YORK**

Largest city in the US with the  
most sports and entertainment  
sponsorships of any US market



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1	Verizon	6	Pepsi	11	MetLife
2	Ticketmaster	7	Hospital for Special Surgery (HSS)	12	Hyundai Motor
3	Ford Motor Company	8	Dunkin'	13	National Grid
4	Northwell Health	9	Chase	14	New York Lottery
5	Bud Light	10	Delta Air Lines	15	Citizens Bank

Major Market  
**NEW YORK**

## Brands transform events in NYC

In the NYC market, top sponsorship brands are supporting events, transforming fan experiences, and enhancing operational efficiencies. Verizon is at the forefront with its advanced 5G technology, improving connectivity and interactions at venues like MetLife Stadium and the Prudential Center. Ford drives community engagement and youth empowerment through its collaboration with New York City FC. Ticketmaster revolutionizes ticketing at Barclays Center for seamless event access. Northwell Health boosts health and wellness by introducing public pond hockey rinks and programs with the New York Islanders. These types of brands are pivotal in driving innovation and engagement in this vibrant market.



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

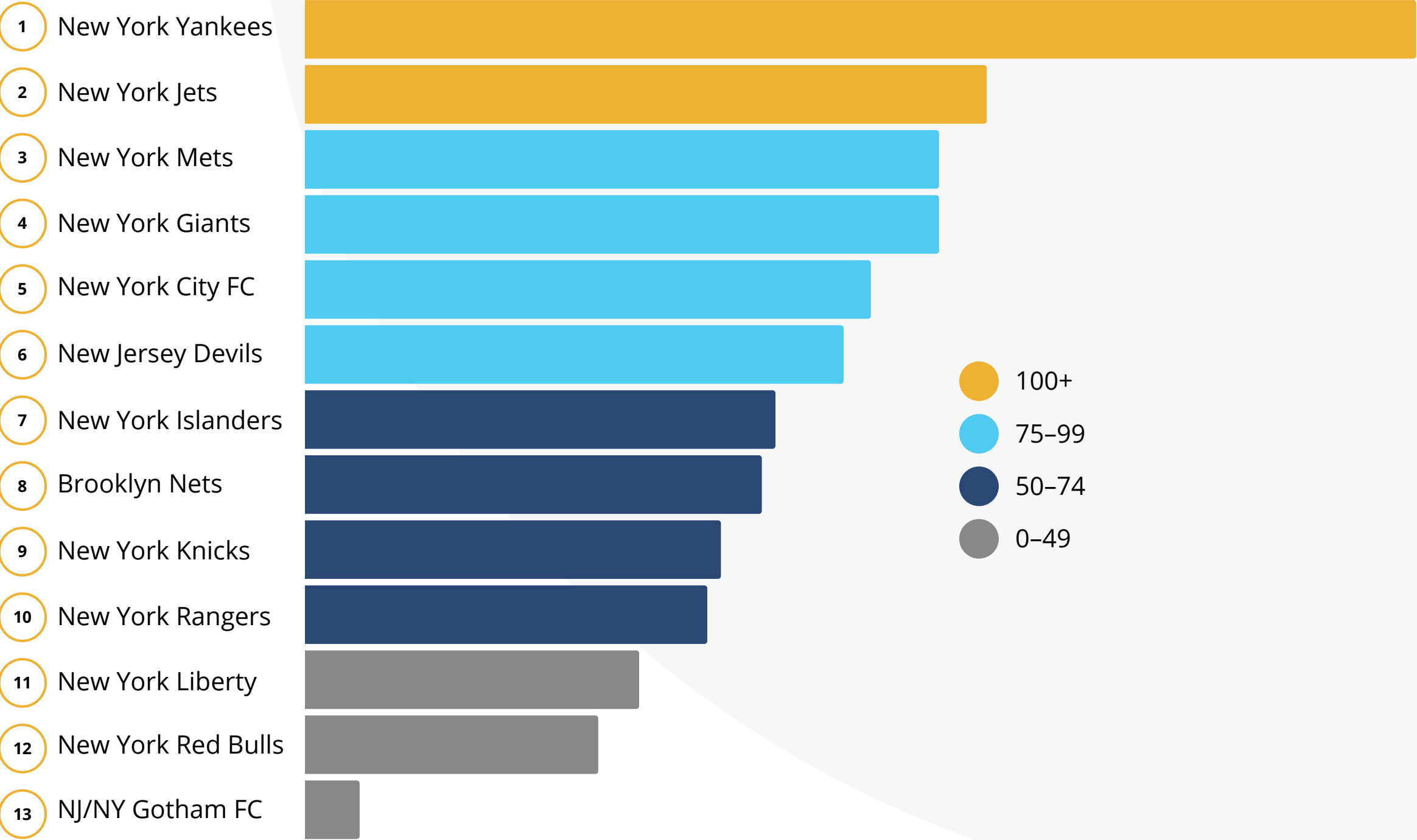
- |   |                                       |    |                               |
|---|---------------------------------------|----|-------------------------------|
| 1 | <b>Financial</b><br>575+              | 6  | <b>Food Products</b><br>200+  |
| 2 | <b>Alcoholic Beverage</b><br>565+     | 7  | <b>Gaming</b><br>200+         |
| 3 | <b>Healthcare</b><br>435+             | 8  | <b>Transportation</b><br>200+ |
| 4 | <b>Auto</b><br>400+                   | 9  | <b>Insurance</b><br>185+      |
| 5 | <b>Non-Alcoholic Beverage</b><br>250+ | 10 | <b>Technology</b><br>180+     |





# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship deals



**Jalen Brunson**  
New York Knicks





# Pro Sports Team Insight

## Gotham FC's untapped potential for brand partnerships

Gotham FC, the reigning champions of the 2023 NWSL season, present a unique opportunity for brands looking to penetrate the New York City sports market. Despite their recent triumph, Gotham FC has the fewest sponsorship deals (with 8) among all New York City pro sports teams. Gotham FC's victory not only elevates their status on the field but also sparked a surge in the team's social media following, which has increased by an average of 40% across all channels. Brands in unsold sponsorship categories (see examples below) should pay close attention.

### Food Products



#### Where it's sold:

- 12 NYC pro sports teams
- 50% of all NWSL teams

### Hotels & Resorts



#### Where it's sold:

- 11 NYC pro sports teams
- 65% of all NWSL teams

### Technology



#### Where it's sold:

- 10 NYC pro sports teams
- 71% of all NWSL teams

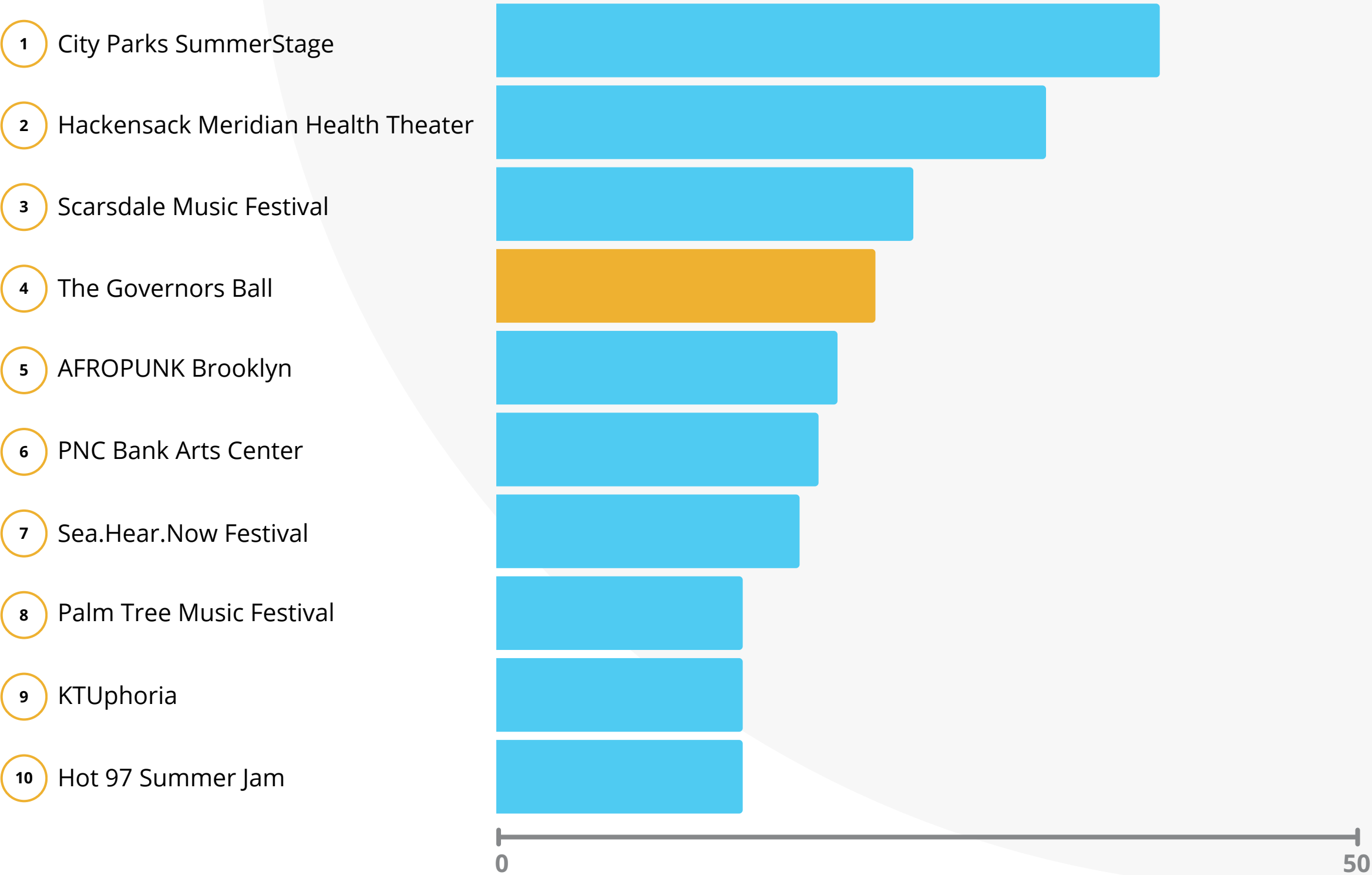
**Nealy Martin**  
NJ/NY Gotham FC





# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals



# Concert and Music Venue Sponsorships

Brands activate New York City concerts and festivals

Leading brands in NYC's festivals and music venues employ innovative activations to enhance engagement and brand visibility. M&M's creates interactive experiences with games and customizable candy stations, while Coca-Cola focuses on hydration and sustainability through branded hydration stations and recycling initiatives. Chateau Ste. Michelle offers premium wine lounges for a sophisticated experience, and Northwell Health promotes wellness with health screenings and first aid stations. Capital One provides exclusive perks like VIP lounges and priority access, and Bacardi's vibrant bars feature live DJ sets and signature cocktails. T-Mobile highlights connectivity with charging stations and virtual reality demos, and Heineken creates social hubs with live music and interactive games. All of these strategies effectively align with the festival atmosphere, making these brands integral to the event experience.





# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |   |  |    |  |
|---|--|----|--|
| 1 | <b>Non-Athletic Apparel &amp; Footwear</b> | 6  | <b>Concerts, Festivals, Shows &amp; Theaters</b> |
| 2 | <b>TV/Streaming Networks &amp; Studios</b> | 7  | <b>Airline</b>                                   |
| 3 | <b>Cosmetics &amp; Skin Care</b>           | 8  | <b>Grooming &amp; Toiletry Products</b>          |
| 4 | <b>Tourism</b>                             | 9  | <b>Motion Pictures &amp; Studios</b>             |
| 5 | <b>Apparel, Footwear &amp; Accessories</b> | 10 | <b>Watches &amp; Jewelry</b>                     |

## Apparel and media take on the NYC streets

In our analysis of 390 brands advertising in NYC, we identified keys to effective advertising: strategic placements, impactful visuals, and concise messaging. Media giants like Netflix, Hulu, and Paramount+ lead, followed by apparel brands Ray-Ban, H&M, and Skims. Apple and Beats by Dre showcase tech innovations prominently. Consumer services such as FreshDirect and Uber emphasize convenience, while Heineken, Sparkling ICE, McDonald's, and Starbucks utilize high-traffic spots for maximum reach. Healthcare providers Pfizer and RWJBarnabas Health, along with educational institutions like The City University of New York, also effectively use OOH to connect with the city's diverse consumer base.





# Major Market LOS ANGELES

Highest team sponsorship average  
deal size across major pro sports  
in any US market



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1 Toyota

2 Yaamava Resort & Casino at San Manuel

3 Pechanga Resort & Casino

4 Coca-Cola

5 Honda

6 Bud Light

7 SoFi

8 UCLA Health

9 Lexus

10 McDonald's

11 Cedars-Sinai Medical

12 Michelob Ultra

13 Ticketmaster

14 American Express

15 American Airlines



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

- |   |                                       |    |   |
|---|---------------------------------------|----|---|
| 1 | <b>Alcoholic Beverage</b><br>600+     | 6  | <b>Hotel, Restaurant, Leisure</b><br>250+ |
| 2 | <b>Auto</b><br>450+                   | 7  | <b>Food Products</b><br>165+              |
| 3 | <b>Financial</b><br>375+              | 8  | <b>Media</b><br>150+                      |
| 4 | <b>Healthcare</b><br>275+             | 9  | <b>Telecommunications</b><br>150+         |
| 5 | <b>Non-Alcoholic Beverage</b><br>275+ | 10 | <b>Technology</b><br>145+                 |

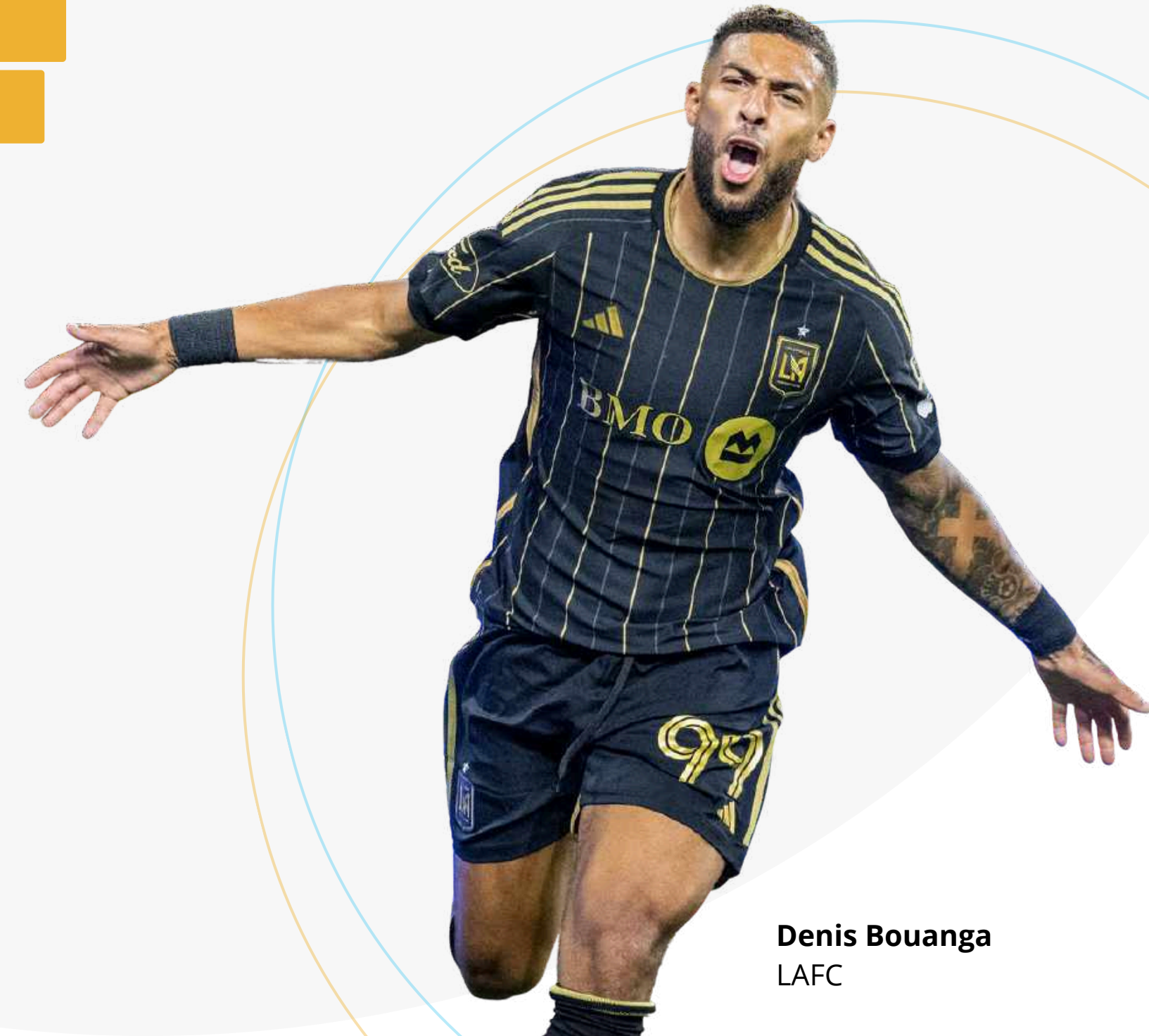
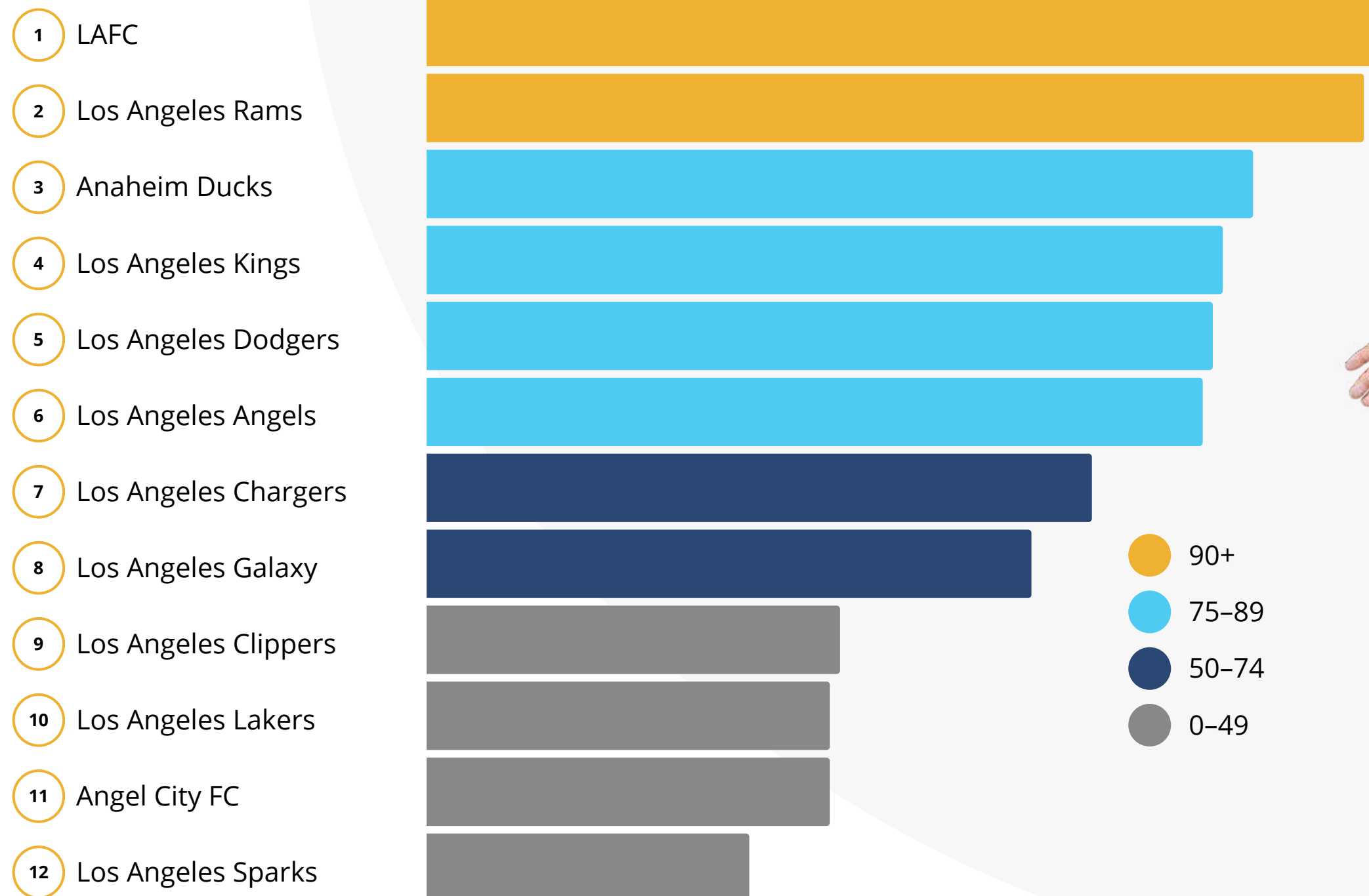
## The auto category's reign in Los Angeles

Auto brands in Los Angeles significantly outperform the national average in leveraging sponsorship opportunities, boasting an average of 13 sponsorship assets across sports, music festivals, and out-of-home advertising, compared to the US average of 4 deals. With an average of 6 auto brands per sports team, the LA market highlights a robust and diverse investment in sports sponsorships. This prominence is fueled by the region's leadership in electric vehicle sales and strong consumer demand for cars. Strategic sponsorships with high-visibility sports teams allow auto brands to enhance market penetration and visibility, tapping into sustainability trends and passionate fan bases to boost brand loyalty and drive sales.



# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship deals



**Denis Bouanga**  
LAFC

# Pro Sports Team Insight

## Shohei Ohtani x LA Dodgers

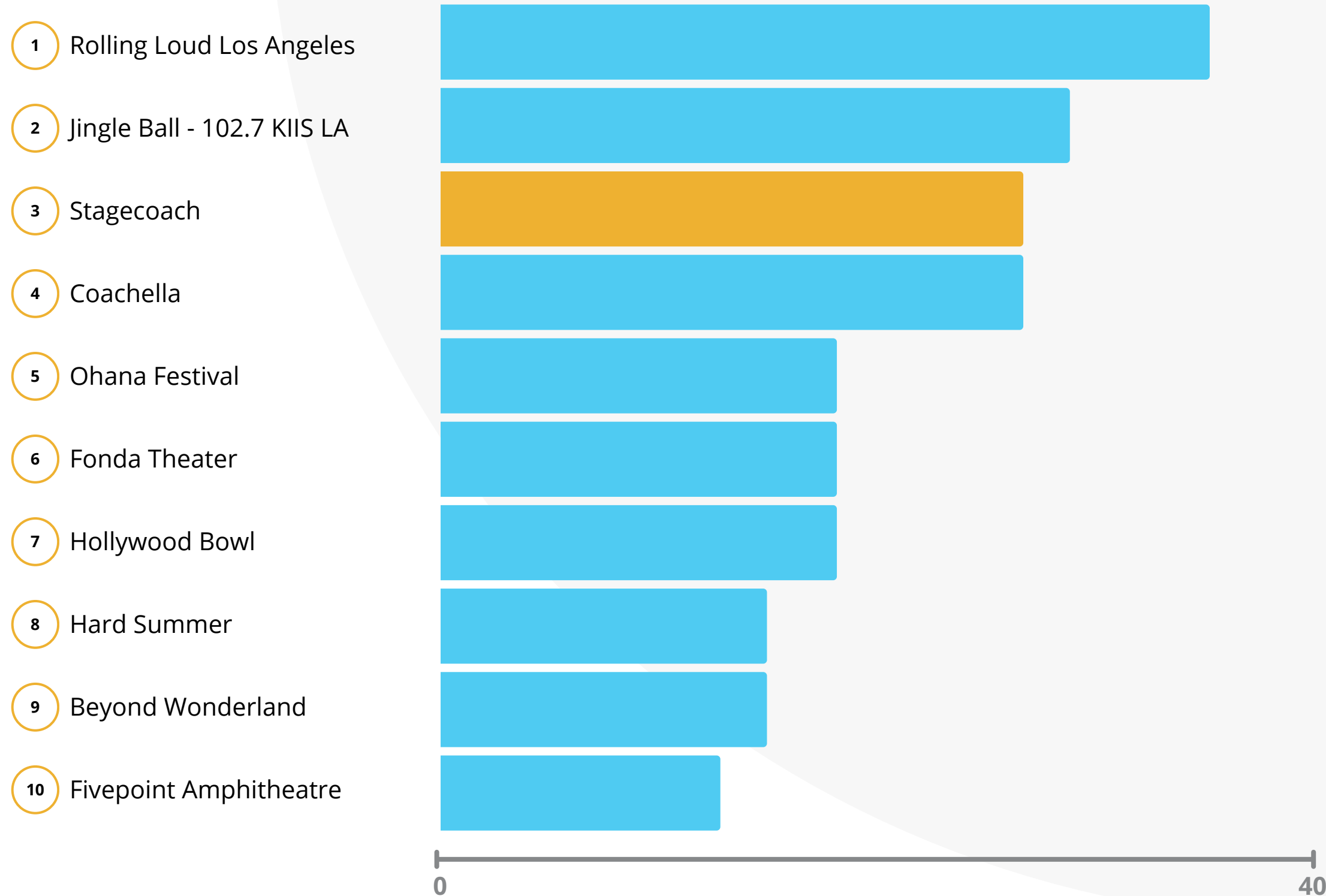
The signing of Shohei Ohtani—the most followed MLB player on Instagram—has brought a new era of commercial success to the Los Angeles Dodgers. Since the beginning of the 2024 season, the Dodgers have secured 15 new sponsorship deals, 7 of which are with Japanese-based companies. These new sponsors come from varied brand categories such as transportation, retail, food products, and healthcare, highlighting Ohtani's broad market appeal and significant impact on diversifying the sponsorship portfolio of the Dodgers. His influence highlights the profound effect a star athlete can have on enhancing team marketability and driving international engagement.

**40%**increase in followers  
on social media  
(Ohtani)**25%**increase in followers  
on social media  
(Dodgers)**2x**more social media  
followers than Dodgers  
(Ohtani)**Shohei Ohtani**  
Los Angeles Dodgers



# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals



**Megan Moroney**  
Stagecoach





# Concert and Music Venue Sponsorships

Brands elevate the LA festival experience

With 25 brand partners, Stagecoach ranks among the top 3 music festivals in the Los Angeles market for sponsorships. The emerging prominence of this festival is also showcased by its 50% increase in social media followers over the past 12 months, outpacing Coachella's 22% growth. The festival's rising popularity is fueled by its unique positioning within the brand activation and influencer space, along with a growing interest in country music. Key sponsors such as Toyota, e.l.f. Beauty, and Wrangler have leveraged their collaborations with the festival to engage with audiences through immersive and experiential marketing strategies, making Stagecoach a hot spot for brand exposure and a pivotal event for the country music scene.





# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |   |  |    |  |
|---|--|----|--|
| 1 | <b>TV/Streaming Networks &amp; Studios</b> | 6  | <b>Casinos, Race Tracks &amp; Gaming</b>   |
| 2 | <b>Legal &amp; Law Firms</b>               | 7  | <b>Watches &amp; Jewelry</b>               |
| 3 | <b>Non-Athletic Apparel &amp; Footwear</b> | 8  | <b>Colleges &amp; Universities</b>         |
| 4 | <b>Spirits (Tequila)</b>                   | 9  | <b>Motion Pictures &amp; Studios</b>       |
| 5 | <b>Hospital</b>                            | 10 | <b>Integrated TV, Internet &amp; Phone</b> |

## LA's TV and streaming giants command OOH landscape

To capture the attention of the diverse and dynamic population in Los Angeles, TV and streaming networks—Netflix, Disney, Warner Brothers, Hulu, Apple TV, and Paramount Pictures, for instance— extensively utilize OOH advertising, making this the second most active category among over 210 brands. These major media brands dominate with strategic placements and vivid visuals, effectively capturing the city's broad audience. Paramount+ features vibrant bus wraps and billboards; Disney advertises its films with colorful and engaging promotions; and Hulu's OOH ads showcase the power of high-traffic area placements. These strategies ensure that brands remain visible and top of mind in a very competitive market.





# Major Market CHICAGO

Third most populated US city



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1	Wintrust Financial	6	Advocate Health Care	11	Toyota
2	United Airlines	7	Magellan Corporation	12	Modelo Especial
3	BMO US	8	Hyundai Motor	13	Ticketmaster
4	Miller Lite	9	VIZZY Hard Seltzer	14	Horizon Therapeutics
5	Blue Cross Blue Shield of Illinois	10	Jewel Osco	15	Guaranteed Rate

**Wintrust and BMO lead community impact in Chicago**

The Chicago sponsorship market is driven by key brands in banking, beer, soft drinks, airlines, and car manufacturers and often focuses on community engagement and support. Wintrust Financial's recent partnership with the Chicago Red Stars has doubled the number of youth soccer camps and highlights the brand's commitment to women's sports and community outreach. BMO's collaboration with the Chicago Bulls emphasizes support for Black- and Brown-owned businesses through events like the inaugural Business Summit. Finally, Chicago's biggest music festival, Lollapalooza, attracts top brands known for innovative activations, further showcasing the city's dynamic sponsorship landscape.

# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

1

**Alcoholic Beverage**  
525+

2

**Financial**  
385+

3

**Auto**  
225+

4

**Healthcare**  
225+

5

**Non-Alcoholic Beverage**  
225+

6

**Food Products**  
175+

7

**Construction & Industrial**  
140+

8

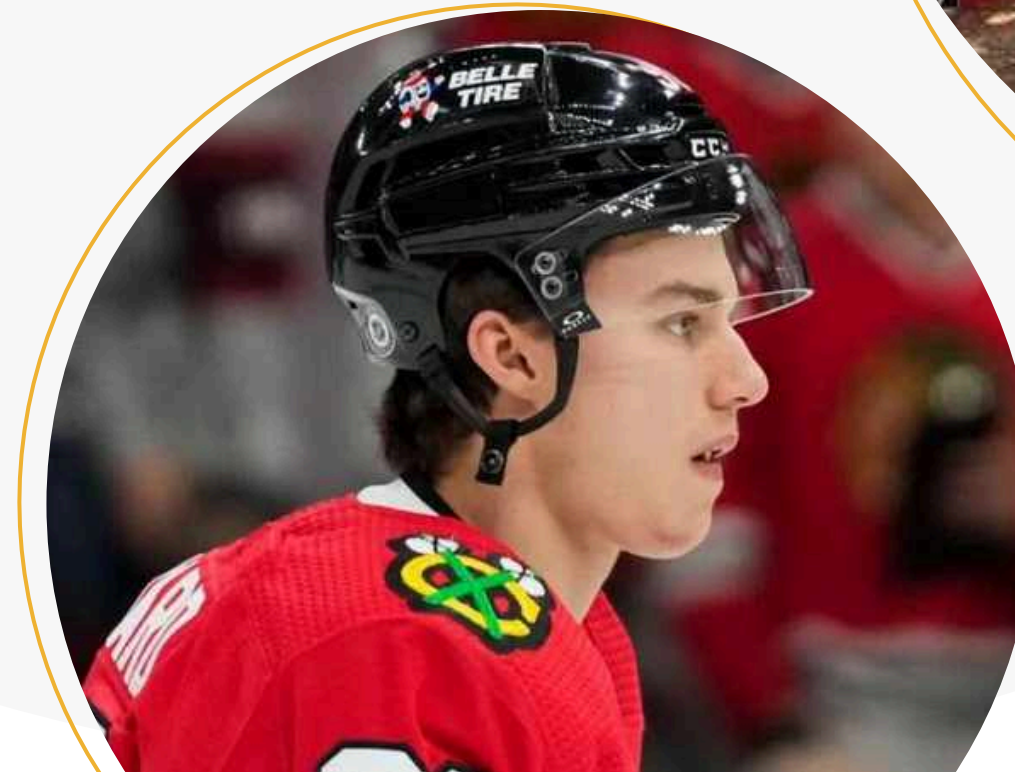
**Transportation**  
140+

9

**Media**  
125+

10

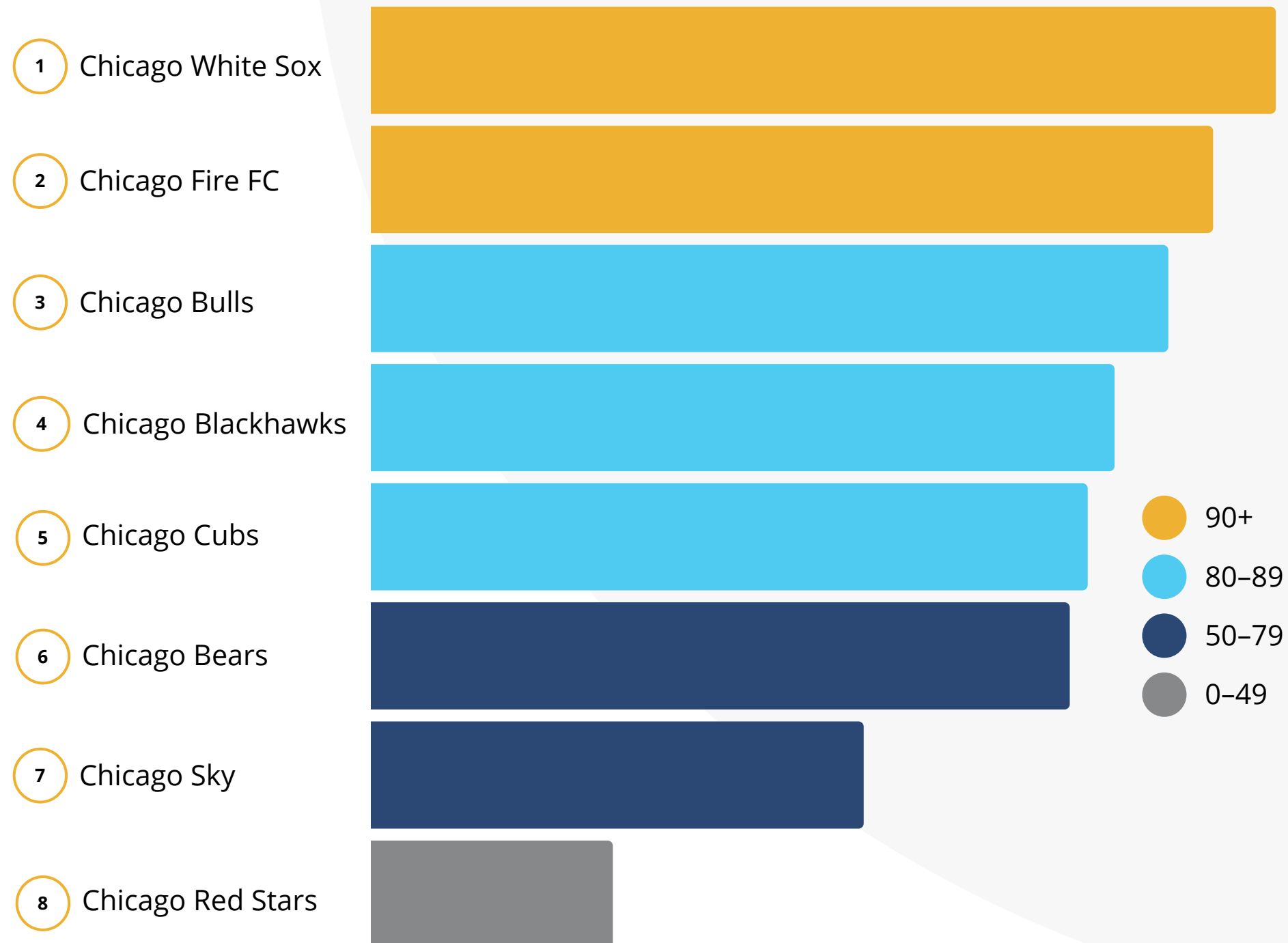
**Retail**  
125+





# Pro Sports Properties With the Most Deals

Ranked by number of sponsorship deals



**Caleb Williams**  
Chicago Bears



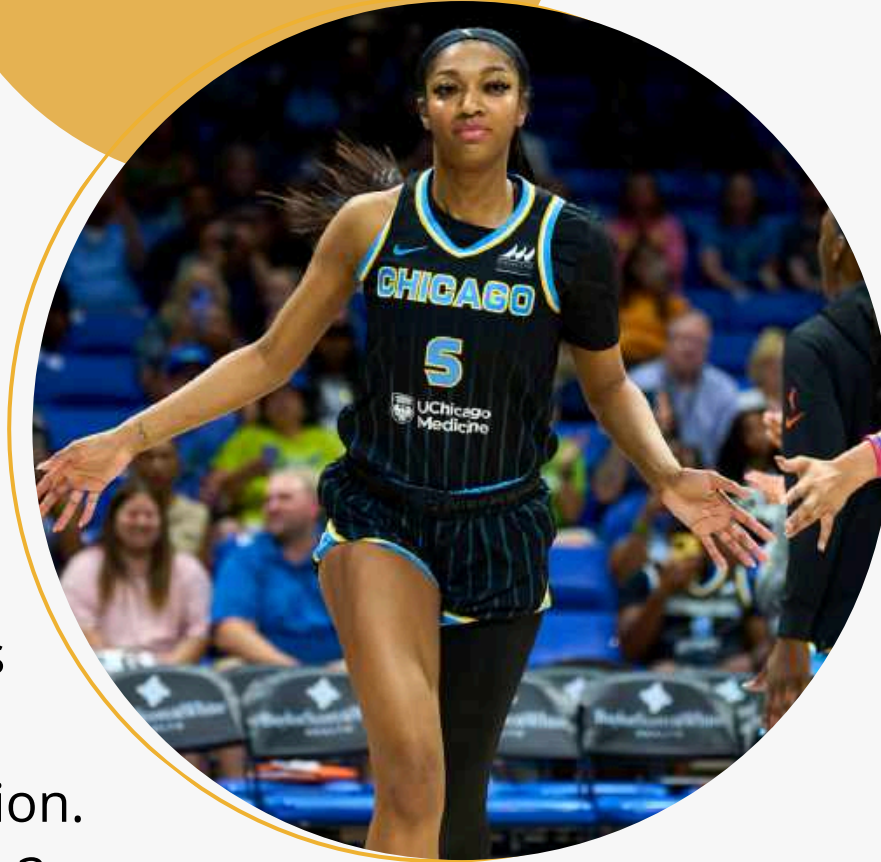
# Pro Sports Team Insight

## New player arrivals influence sponsorship space

The arrival of new talent—rookies Angel Reese (Chicago Sky), Caleb Williams (Chicago Bears), and Connor Bedard (Chicago Blackhawks)—in Chicago sports is significantly influencing sponsorship deals. These rising stars draw substantial partnerships and media attention, boosting the profiles and excitement of their respective teams.

- Angel Reese has been crucial in securing Raising Cane's as the official sponsor of the Chicago Sky. This marks the brand's first WNBA sponsorship.
- With the Bears' upcoming game in London (its first in five years), Caleb Williams is set to attract global attention.
- Connor Bedard's presence has notably enhanced engagement for the Chicago Blackhawks, as the team's top 3 branded social posts featured him.

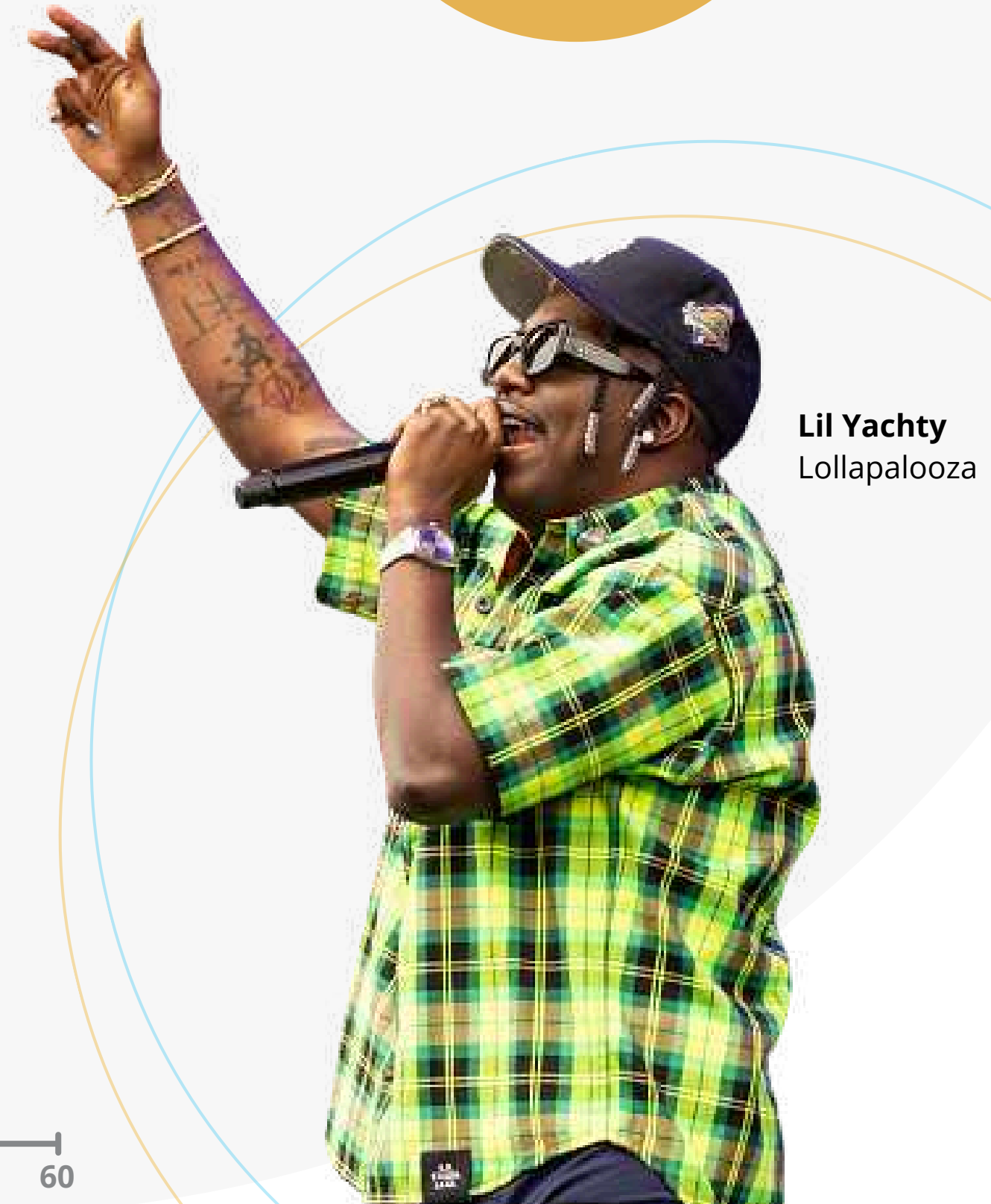
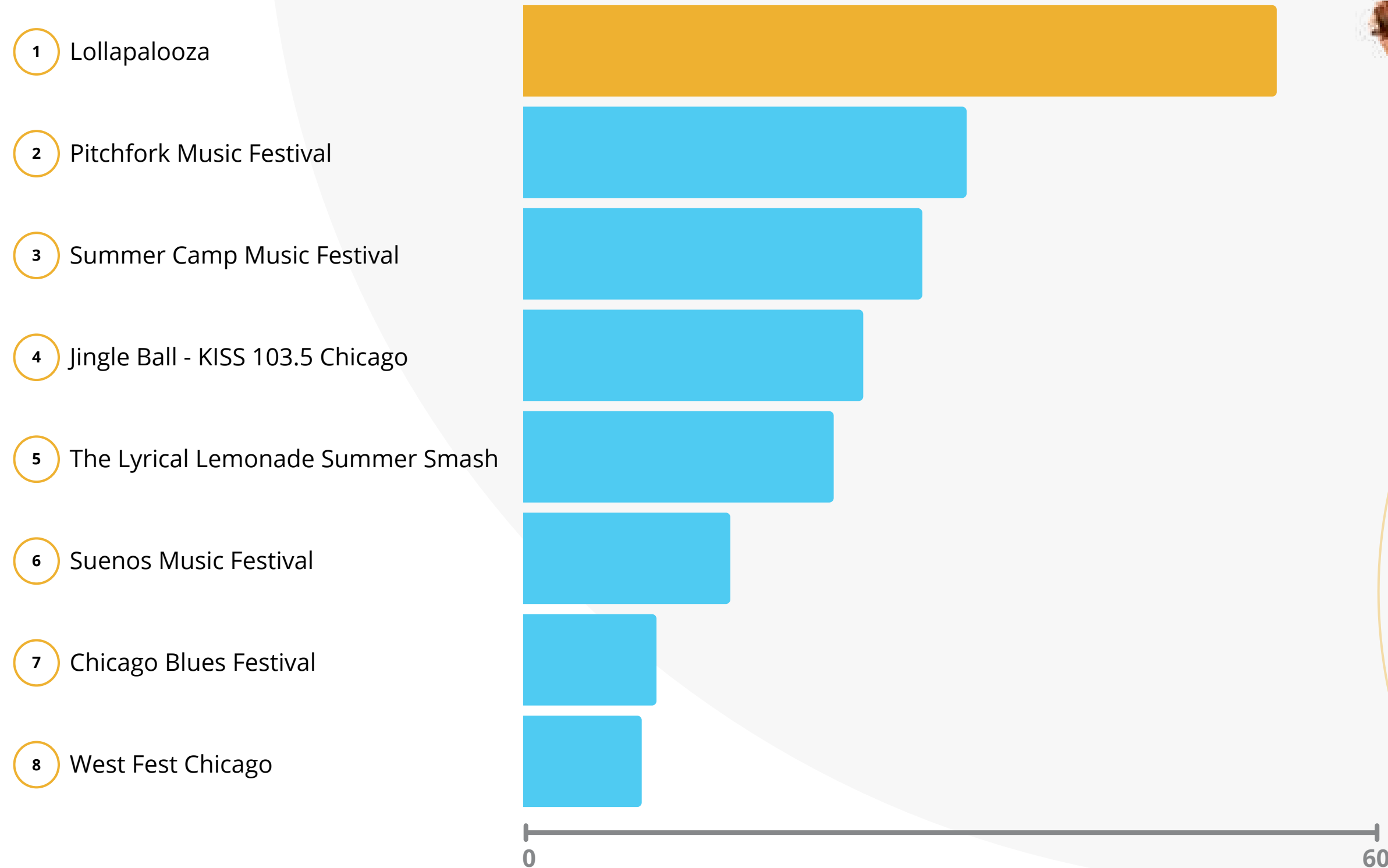
These developments showcase how emerging talent drives sponsorships and amplifies team visibility, making the new team members valuable assets for attracting major partnerships.





# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals





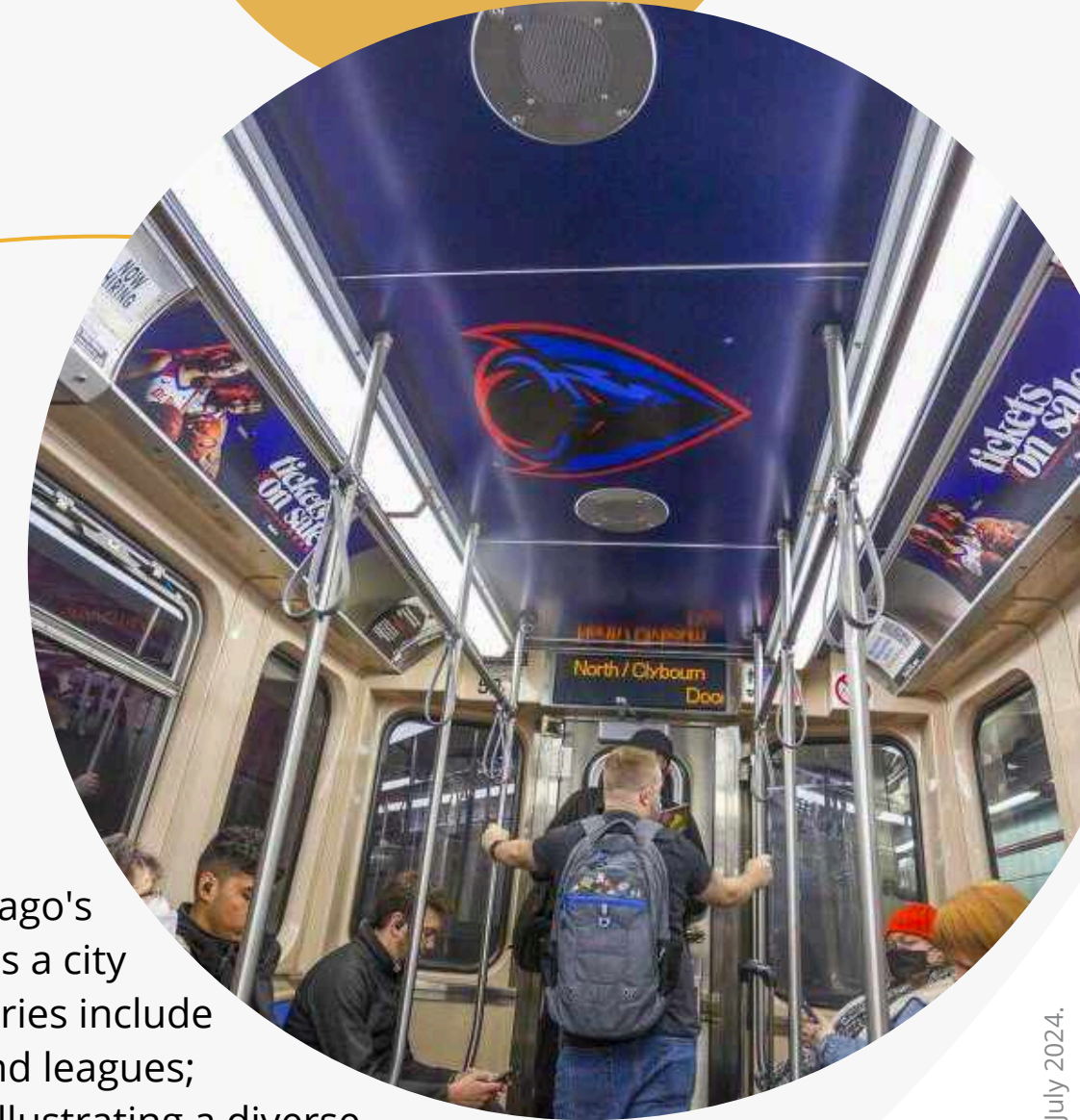
# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |  |                                      |
|--|--------------------------------------|
| 1 Legal & Law Firms                      | 6 Colleges & Universities            |
| 2 Teams, Venues, Events & Leagues        | 7 Clinics, Labs & Specialty Services |
| 3 Concerts, Festivals, Shows & Theaters  | 8 TV/Streaming Networks & Studios    |
| 4 Tourism                                | 9 Museums, Zoos & Entertainment      |
| 5 Real Estate Agencies, Services & Other | 10 Beer (US)                         |

## Diverse brands thrive with OOH advertising in Chicago

With 245 brands leveraging the channel, Chicago's out-of-home advertising landscape showcases a city with dynamic brand engagement. Top categories include legal and law firms; teams, venues, events, and leagues; and concerts, festivals, shows, and theaters, illustrating a diverse range of industries utilizing OOH to capture attention. Brands in Chicago activate through highly visible and creative placements, from buses and billboards to subway stations, effectively reaching a wide audience in various urban settings. This strategy not only enhances brand visibility but also reinforces Chicago's status as a bustling hub for business and entertainment.







# Emerging Market AUSTIN

Highest population percentage  
growth of any major metro over  
12 straight years (2011–2023)



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1	St. David's Healthcare	6	YETI	11	Michelob Ultra
2	SeatGeek	7	Intel	12	Tito's Handmade Vodka
3	Q2 Holdings	8	Coca-Cola	13	Hulu
4	H-E-B	9	Captain Morgan	14	Heineken
5	SciPlay	10	Miller Lite	15	Google Pixel

## Local brands champion community

Local brands are front and center in Austin sponsorships, with 5 of the top 6 brands headquartered in the city. This local aspect is reflected in the type of sponsorship deals pursued, with each brand focusing heavily on community support. St. David's Healthcare helps provide opportunities for underserved schools and Central Texas youth through Austin FC's nonprofit arm, the 4ATX Foundation. Q2 Holdings launched the *Austin FC Dream Starter Competition*, inviting entrepreneurs from underrepresented groups to apply and compete for \$100,000 in Dream Starter funds to accelerate their ventures. H-E-B, in partnership with Austin FC, continues the *Season of Giving* program, which includes a series of events to support the community during the holiday season.



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

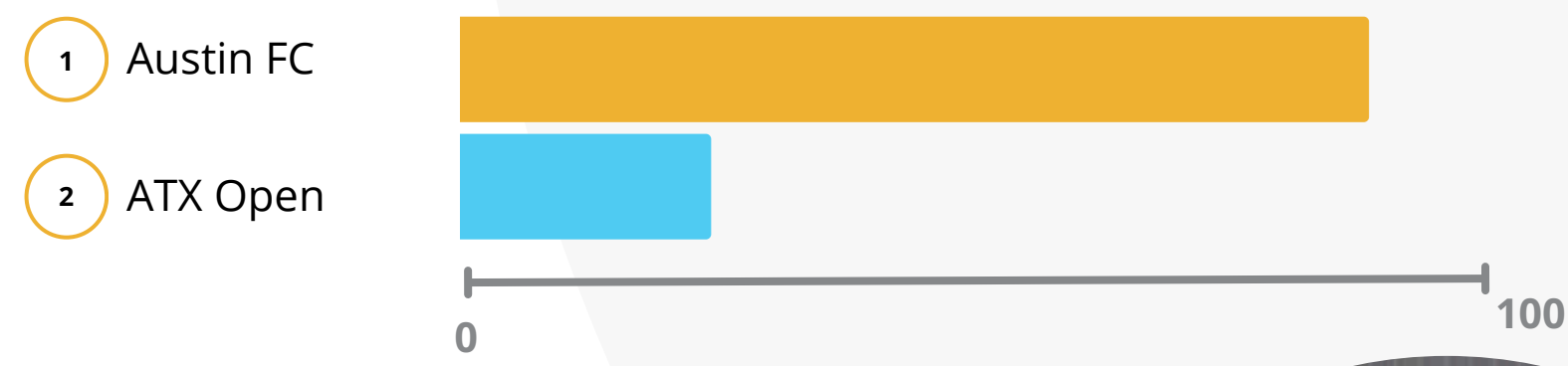
- |   |                                  |    |   |
|---|----------------------------------|----|---|
| 1 | <b>Alcoholic Beverage</b><br>85+ | 6  | <b>Apparel &amp; Accessories</b><br>25+     |
| 2 | <b>Financial</b><br>45+          | 7  | <b>Food Products</b><br>20+                 |
| 3 | <b>Auto</b><br>35+               | 8  | <b>Non-Alcoholic Beverage</b><br>20+        |
| 4 | <b>Technology</b><br>30+         | 9  | <b>Construction &amp; Industrial</b><br>20+ |
| 5 | <b>Healthcare</b><br>30+         | 10 | <b>Business Services</b><br>20+             |





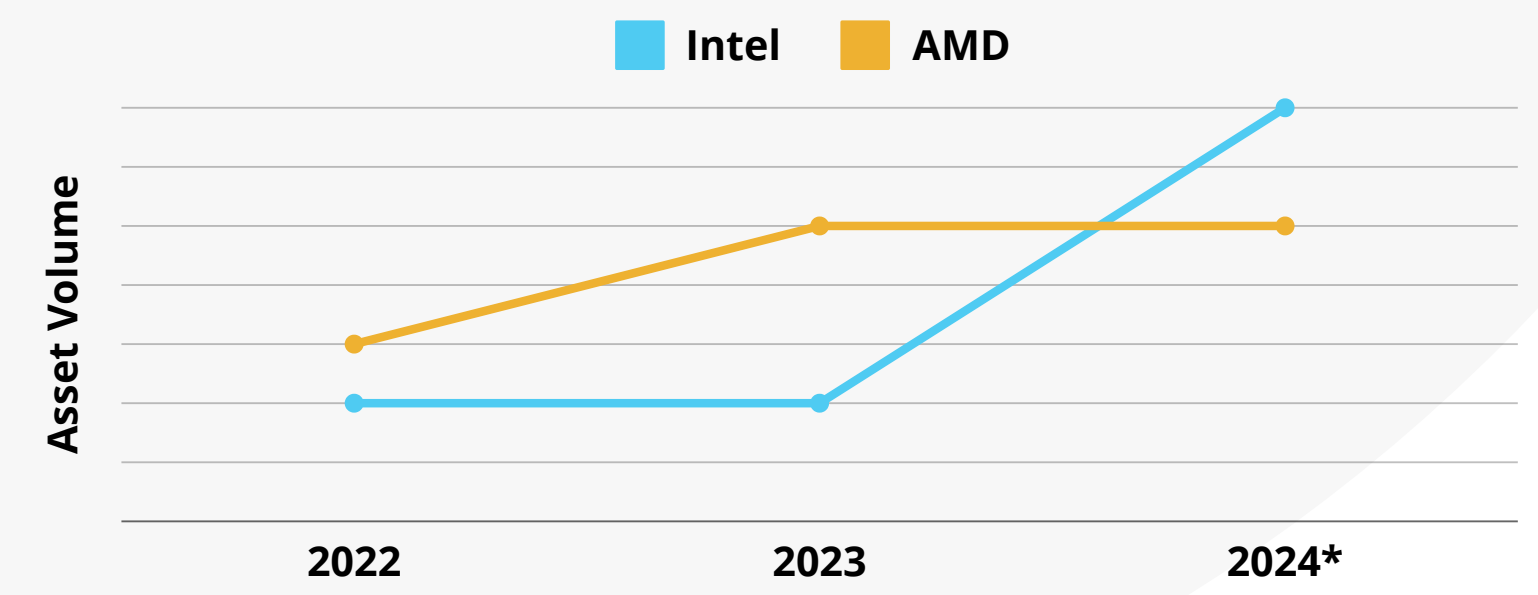
# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship deals



## Austin FC scores with rival sponsorships from AMD and Intel

Industry leaders AMD and Intel are fierce rivals in the graphics processing units (GPU) world, fighting for supremacy in the realm of AI hardware. In the 2021 season, Intel began sponsoring Austin FC. Just one year later, and eclipsing the number of assets utilized by Intel, AMD inked their own sponsorship deal with the MLS team. Who's winning? After an increase in asset usage from both brands, Austin FC is the true winner!



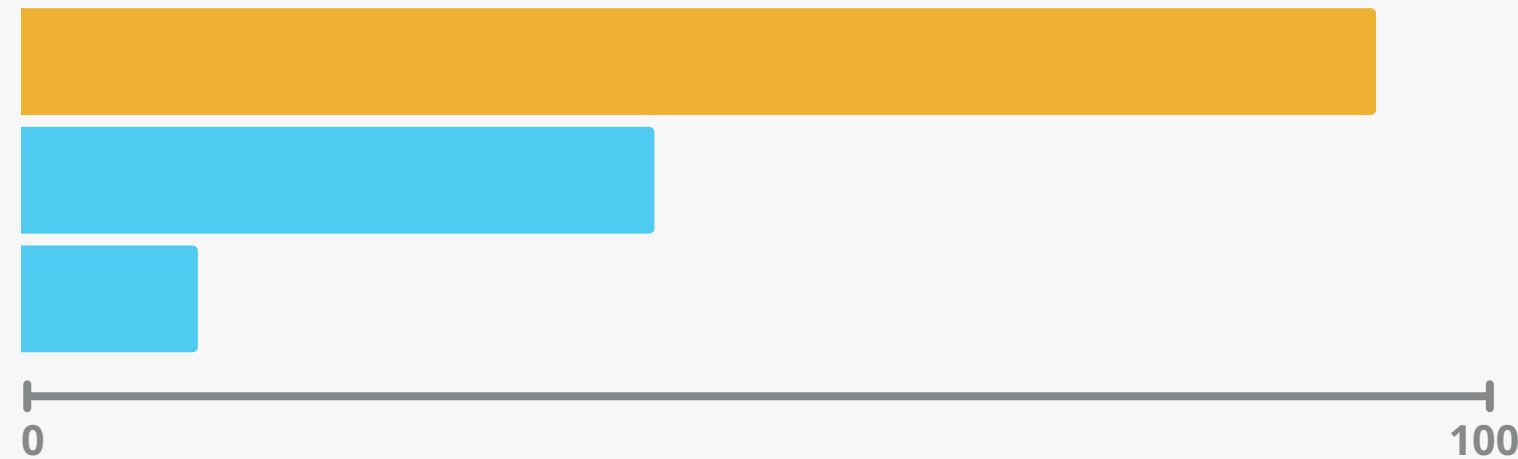
\*Season in progress



# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals

- 1 South by Southwest (SXSW)
- 2 Austin City Limits (ACL)
- 3 iHeartRadio Country Festival



## Auto brands show their tech side at SXSW

Technology brands make up 20% of partnerships at South by Southwest, which is the most of any other category. The prevalence of deals in this industry results in a pivotal platform for automotive brands to unveil and showcase cutting-edge tech that goes far beyond the traditional focus in automotive. Volkswagen captured significant attention last year when it introduced its all-electric VW ID. Buzz, while Porsche launched its electric Taycan and Macan models this year. Honda also made waves when presenting the UNI-ONE, a personal mobility device that features advanced self-balancing technology and intuitive, sensor-driven controls.





# Active Brand Categories Beyond the Stadium

○ ○      ○ ○      ○      ○

- |                                      |                         |
|--------------------------------------|-------------------------|
| 1 Legal & Law Firms                  | 6 Hospital              |
| 2 Transportation & Public Safety     | 7 Credit Union          |
| 3 Burger                             | 8 Convenience Store     |
| 4 Other Charities, PBCs & Nonprofits | 9 Beer (US)             |
| 5 Lottery                            | 10 Wine & Liquor Stores |

## Real estate OOH advertising dips as market cools in Austin

Amid Austin's booming housing market in 2022, real estate agencies ranked just behind legal and law firms in out-of-home ad spending. This category has since plummeted, however, and is now absent from the top 30. This shift aligns with Austin's waning housing market, indicated by a recent increase in available homes—a trend that eases buyer pressure and diminishes the need for competitive bidding. Consequently, real estate brands are adapting their OOH marketing strategies to these new conditions.





# Emerging Market LAS VEGAS

Latest sports mecca that added  
NFL, Super Bowl, NHL, WNBA,  
F1, and Sphere over last 10 years





# Most Sponsorship Exposure for Brands



- |   |                            |    |                          |    |                                       |
|---|----------------------------|----|--------------------------|----|---------------------------------------|
| 1 | Allegiant Air              | 6  | MGM Rewards              | 11 | City National Bank                    |
| 2 | America First Credit Union | 7  | Modelo Especial          | 12 | BetMGM                                |
| 3 | Credit One Bank            | 8  | Intermountain Healthcare | 13 | Yaamava Resort & Casino at San Manuel |
| 4 | Toyota                     | 9  | Ford Motor Company       | 14 | Ticketmaster                          |
| 5 | Ghost                      | 10 | Coca-Cola                | 15 | Cox Communications                    |

## Allegiant Air boosts brand visibility

Allegiant Air exemplifies how a brand can effectively integrate its sponsorship with its respective product or service. By running nationwide promotions for NFL fans to utilize Allegiant for Vegas travel, the airline attracts support from opposing fans that attend Allegiant Stadium for Raiders games. The brand also enhances its visibility with strategic ads at T-Mobile Arena—home of the Golden Knights—showcasing affordable, nonstop flights. Though Allegiant currently ranks outside the top 10 domestic airlines by passenger count, the brand leverages the appeal of Las Vegas—and its vibrant sports scene—to boost brand awareness, attract sports fans, and expand its market share.



# Most Sponsorship Exposure for Categories

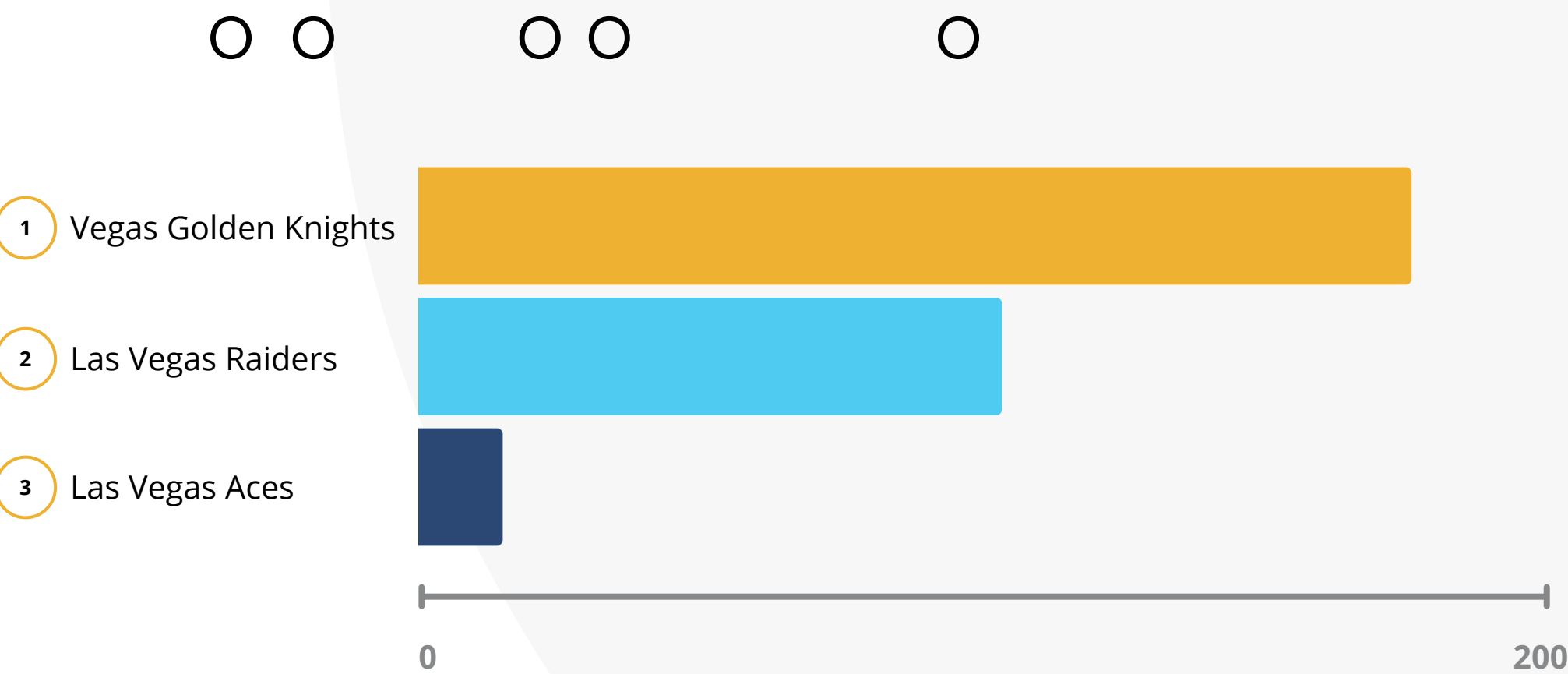


- |   |   |    |                                       |
|---|---|----|---------------------------------------|
| 1 | <b>Alcoholic Beverage</b><br>200+         | 6  | <b>Non-Alcoholic Beverage</b><br>80+  |
| 2 | <b>Hotel, Restaurant, Leisure</b><br>165+ | 7  | <b>Healthcare</b><br>70+              |
| 3 | <b>Financial</b><br>120+                  | 8  | <b>Transportation</b><br>65+          |
| 4 | <b>Auto</b><br>100+                       | 9  | <b>Quick Serve Restaurants</b><br>50+ |
| 5 | <b>Media</b><br>100+                      | 10 | <b>Technology</b><br>50+              |

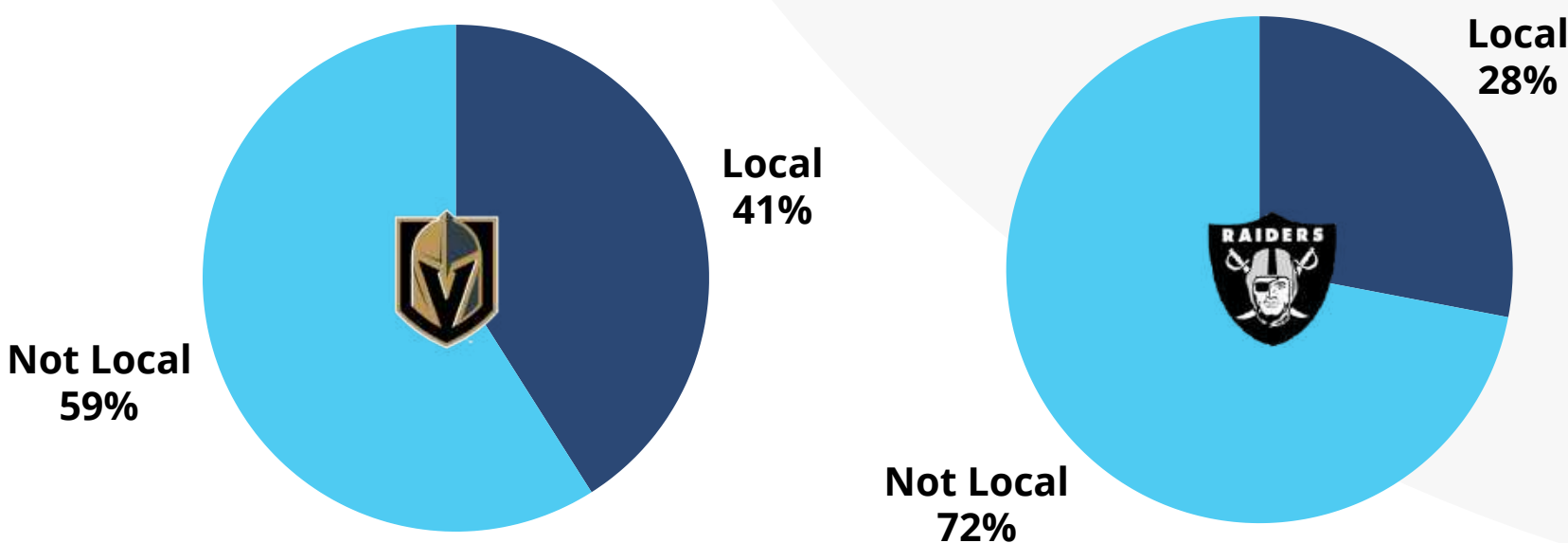




# Pro Sports Properties with the Most Deals



Comparison of Partnership Headquarters



**Golden Knights look local, while Raiders are multinational**

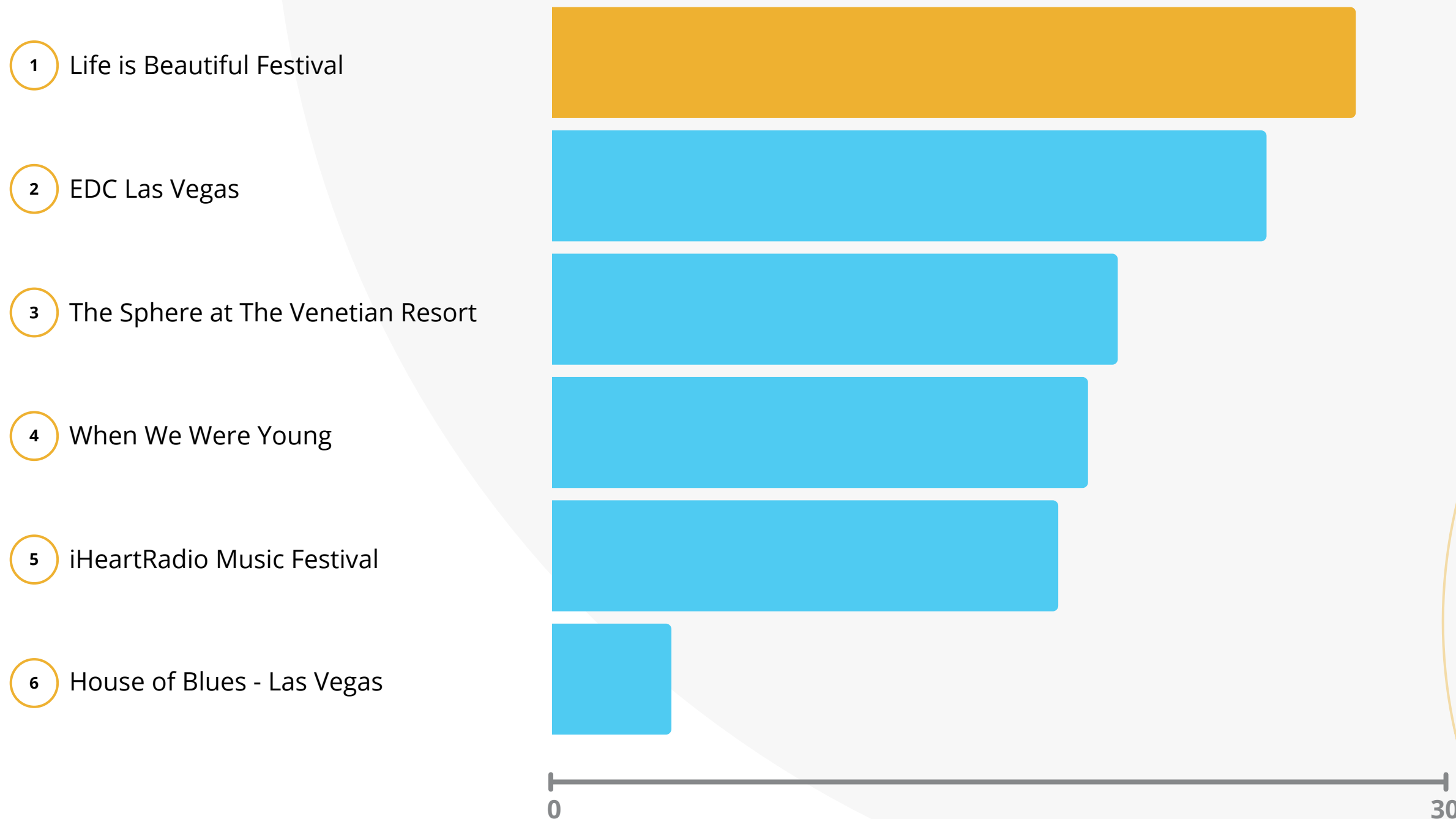
The two largest teams in the Las Vegas market employ different and distinct sponsorship strategies. While 41% of Golden Knights' sponsors are Las Vegas-based (reflecting their deep local roots), only 28% of the Raiders' sponsors are from the local market. Interestingly, 30% of the Raiders' sponsorship partners are multinational conglomerates, compared to 20% for the Golden Knights. This strong local backing has made the Golden Knights the top team for sponsorships in both the NHL and Las Vegas, showcasing the potent impact of community alignment for brand marketers aiming to resonate deeply with the local audience.





# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals



**Bebe Rexha**  
Life is Beautiful

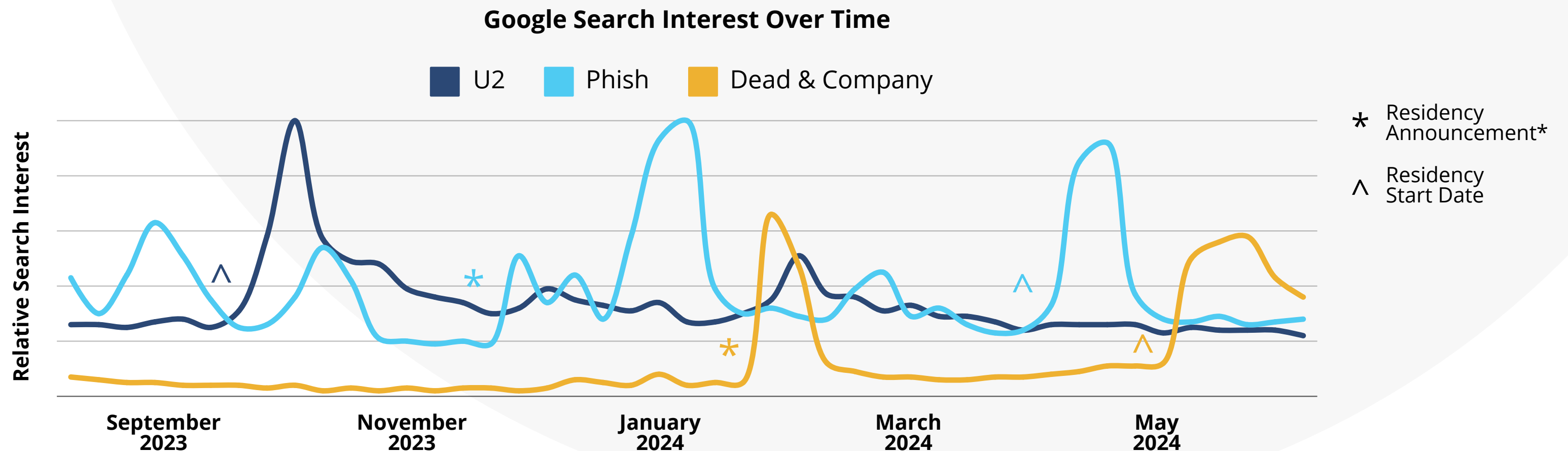




# Concert and Music Venue Sponsorships

Sphere at The Venetian maximizes viral social media impact

Sphere at The Venetian redefines traditional venues and OOH advertising spaces and is a prime social media magnet for any artist performing there or brand that purchases ad space on it. With the most followed TikTok account in Las Vegas and a rumored 4.4 million daily social media impressions, any activity at Sphere becomes an instant social media phenomenon. Google Trends data illustrates this impact, as U2's public interest score surged from 14 to 50 during the band's residency at the venue. This surge reflects the significant increase in visibility, attention, and engagement from fans and nonfans alike for any live performance at Sphere at The Venetian.





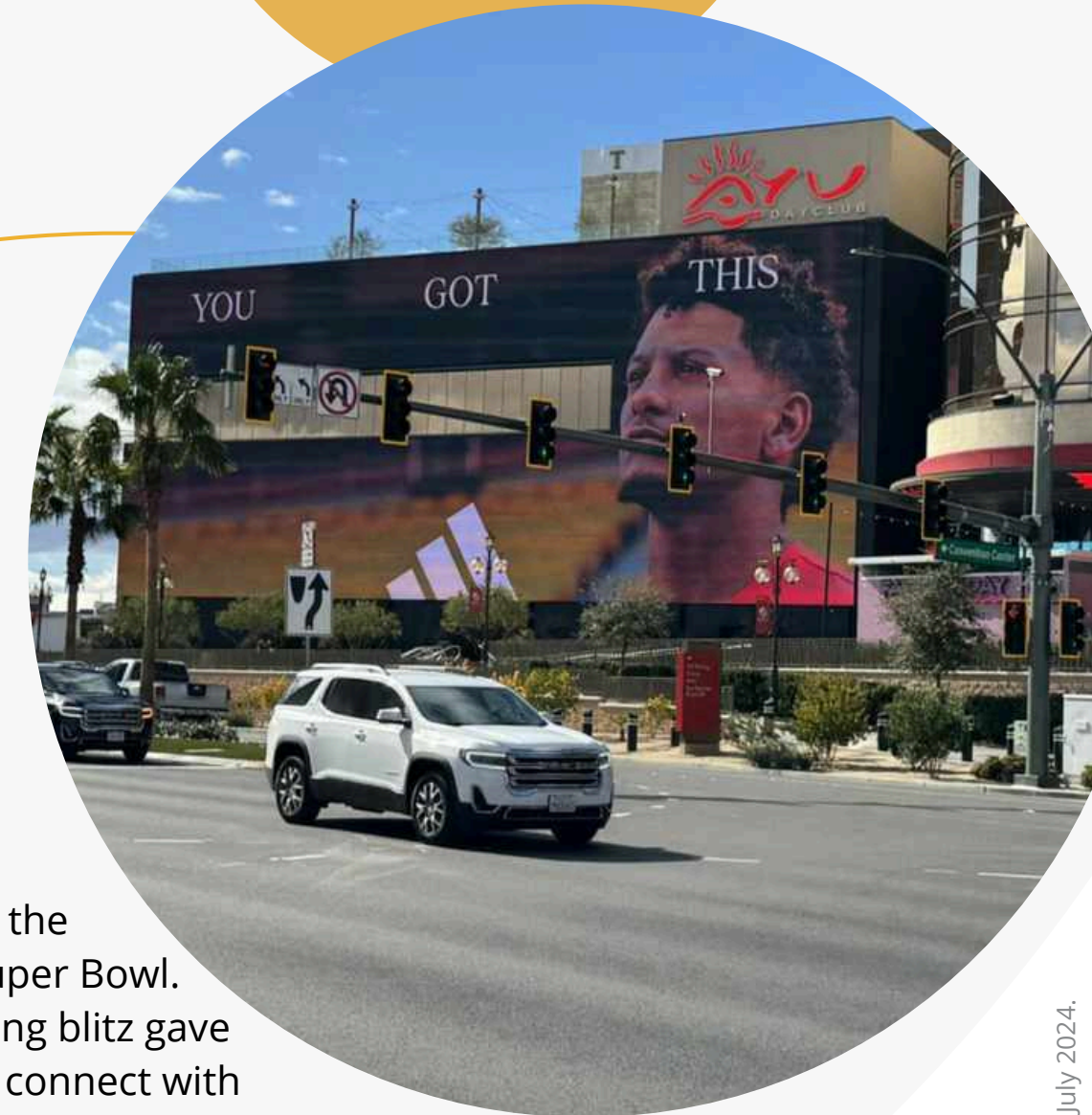
# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |   |                                 |    |                                 |
|---|---------------------------------|----|---------------------------------|
| 1 | Casinos, Race Tracks & Gaming   | 6  | Hotel & Resort                  |
| 2 | Legal & Law Firms               | 7  | Betting & Daily Fantasy         |
| 3 | Teams, Venues, Events & Leagues | 8  | Watches & Jewelry               |
| 4 | Restaurants & Event Spaces      | 9  | TV/Streaming Networks & Studios |
| 5 | Integrated TV, Internet & Phone | 10 | Spirits (Tequila)               |

## The adidas brand scores outside in Vegas during Super Bowl Week

More than 14 NFL league partners, along with the league itself, leveraged out of home for the Super Bowl. This citywide and transportation hub advertising blitz gave NFL-partnered brands a prime opportunity to connect with fans beyond broadcasts and stadiums. The adidas brand engaged Kansas City Chiefs quarterback Patrick Mahomes in its OOH strategy, using multiple assets at Resorts World Las Vegas to ingrain itself with the excitement around the big game. This strategy was sound as there were more eyes than ever in Las Vegas. As a matter of fact, Wednesday to Sunday flight bookings\* surged by an astounding 875% compared to the previous year. For brands planning major event strategies, maintaining visibility in OOH and transportation hubs is crucial for maximizing audience engagement.





# Emerging Market CHARLOTTE

Fast-growing US city with future  
women's soccer, NFL renovations,  
festivals, and tournaments



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

- |   |                 |    |  |    |                              |
|---|-----------------|----|--|----|------------------------------|
| 1 | Atrium Health   | 6  | Novant Health                            | 11 | Spectrum                     |
| 2 | Bank of America | 7  | Lowe's                                   | 12 | Ticketmaster                 |
| 3 | Ally Financial  | 8  | Coca-Cola Consolidated                   | 13 | Coca-Cola                    |
| 4 | Harris Teeter   | 9  | Bojangles Famous Chicken & Biscuits      | 14 | Honeywell                    |
| 5 | Bud Light       | 10 | Blue Cross Blue Shield of North Carolina | 15 | Daimler Trucks North America |

Emerging Market  
**CHARLOTTE**

## Bank of America to shine at Chelsea-Real Madrid match

Bank of America is poised for a significant brand spotlight as Bank of America Stadium hosts Chelsea vs. Real Madrid this summer. While the bank currently lacks sponsorship deals in Europe, it holds the naming rights to the Charlotte stadium and boasts prominent signage, including on the scoreboard and entrance gates. As the second largest bank in the US by number of sponsorship assets, Bank of America will gain substantial exposure when a global audience tunes in to watch two of Europe's most iconic football clubs in the Soccer Champions Tour 2024.



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

1

**Alcoholic Beverage**  
115+

2

**Financial**  
100+

3

**Healthcare**  
85+

4

**Food & Bev Distribution**  
60+

5

**Retail**  
50+

6

**Auto**  
50+

7

**Construction & Industrial**  
50+

8

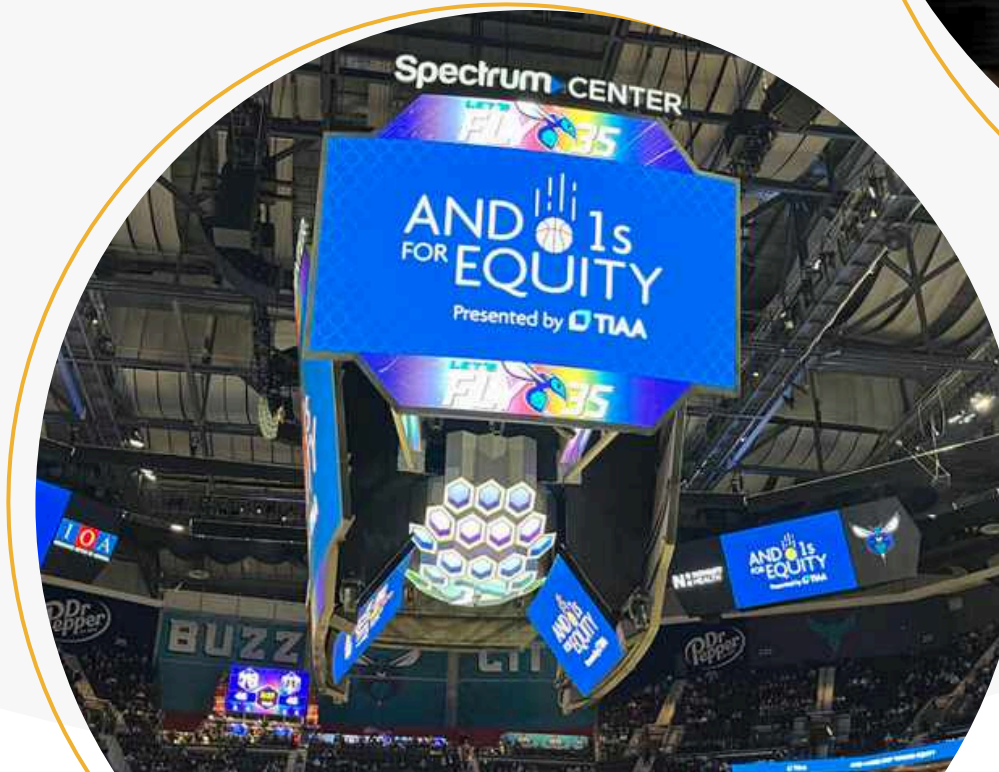
**Quick Serve Restaurants**  
50+

9

**Non-Alcoholic Beverage**  
50+

10

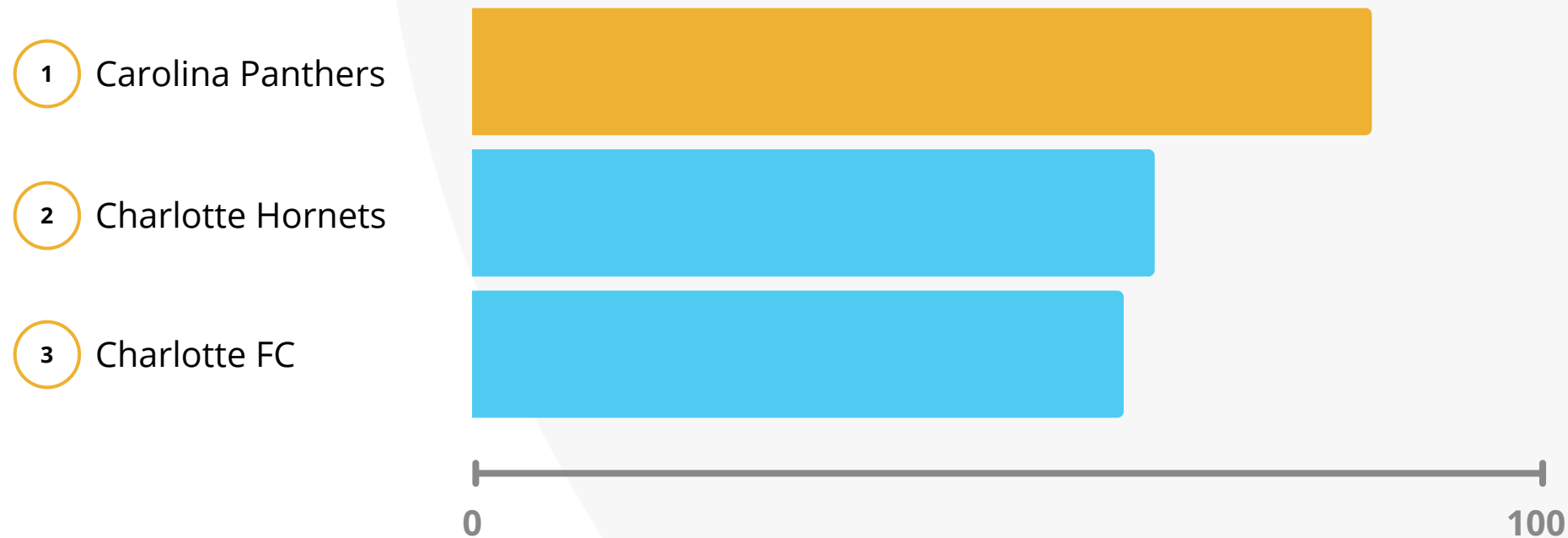
**Insurance**  
35+





# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship deals



## Carolina Ascent FC yields brand sponsorship opportunity

With no existing women's professional sports teams in Charlotte, the Carolina Ascent FC—new to the western Carolina region—offers a significant opportunity for both local and national brands to gain a solid market presence. The nearest comparable team (the NWSL's North Carolina Courage) boasts more than 58 sponsorship deals—and Capelli Sport has already signed on as the Ascent's Official Uniform and Equipment supplier—highlighting substantial potential for partnerships in the Ascent's debut season. Notably, 5 of the top 25 most active brands in the Charlotte market, including Blue Cross Blue Shield of North Carolina and the NC Education Lottery, are current partners of the Courage.

Emerging Market  
**CHARLOTTE**

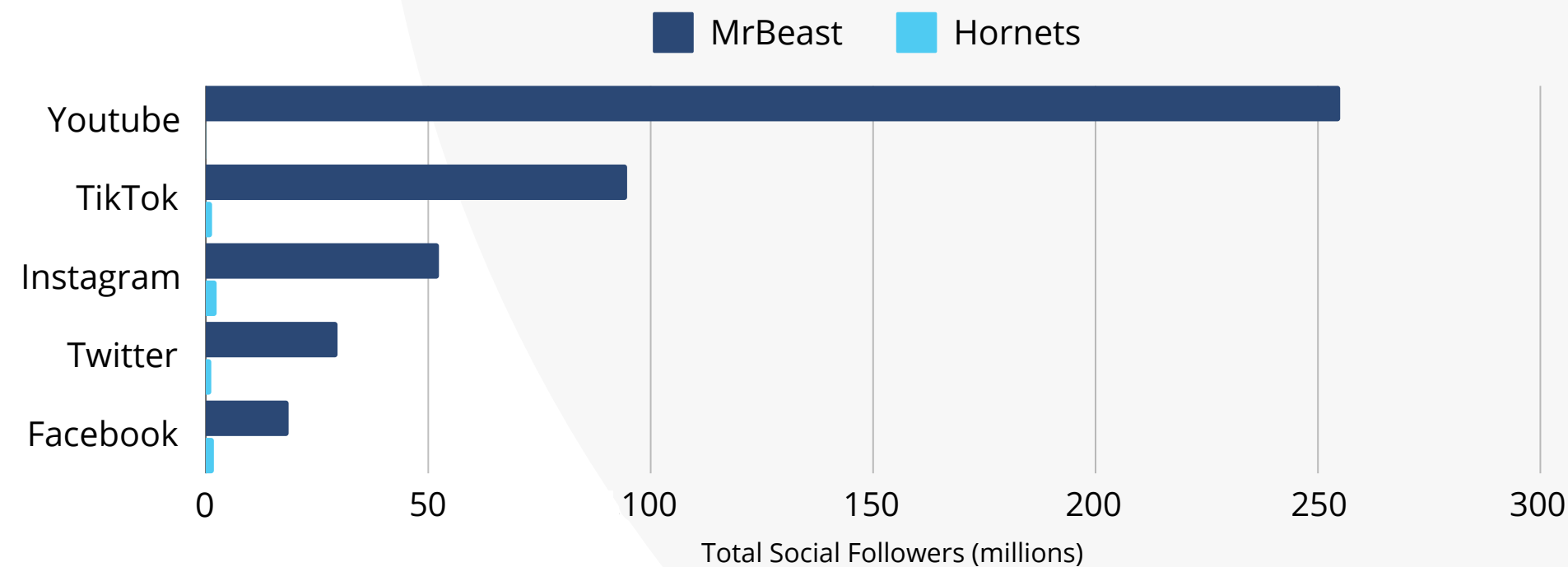




# Pro Sports Team Insight

MrBeast x Charlotte Hornets

MrBeast and Hornets Social Media Presence



## Feastables stands at the forefront of digital marketing

Feastables, the innovative candy brand, secured the primary jersey patch asset of the Charlotte Hornets in the 2023–24 NBA season, resulting in a huge strategic win for both parties. Owned by the influential James Steven Donaldson (a.k.a. MrBeast), Feastables leverages MrBeast's global reach—the largest following for any influencer worldwide—of 255M YouTube subscribers and 450M social media followers. This partnership elevates the brand's credibility, seamlessly integrating MrBeast and Feastables with a diverse sports audience unfamiliar with online influencer personalities. And for the Hornets, the sponsorship yields social posts and content from the world's top influencer, driving unparalleled visibility and engagement not seen in any other jersey patch deal.

**LaMelo Ball**  
Charlotte Hornets

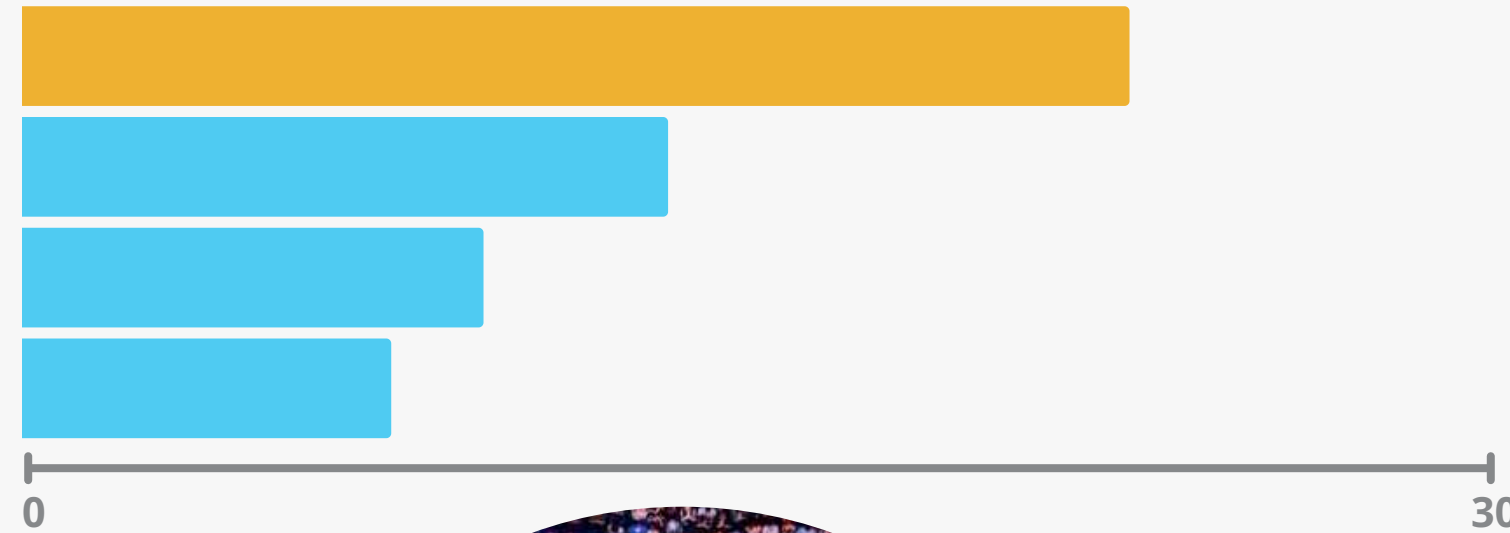




# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals

- 1 Lovin' Life Music Festival
- 2 PNC Music Pavilion
- 3 Skyla Credit Union Amphitheatre
- 4 Fillmore Charlotte



## Charlotte announces new music festival

The inaugural Lovin' Life Music Festival, held in May 2024, featured headliners Stevie Nicks, Post Malone, and Noah Kahan and brought more than 40 artists to a festival-starved region. The event presents a unique opportunity for both local and national brands to connect with a diverse audience. While key government partners like the City of Charlotte and the Charlotte Regional Visitors Authority have already signed up to take prominent sponsorship roles, there's ample room for brands to engage creatively and make a significant impact with this vibrant, emerging festival.





# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |  |                                      |
|--|--------------------------------------|
| 1 Real Estate Agencies, Services & Other | 6 Soft Drink & Carbonated            |
| 2 Legal & Law Firms                      | 7 Hospital                           |
| 3 Betting & Daily Fantasy                | 8 Dealership                         |
| 4 HVAC                                   | 9 Other Charities, PBCs & Nonprofits |
| 5 Colleges & Universities                | 10 Burger                            |

## Marvel's interactive photo booth for year-round engagement

Marvel Entertainment, in collaboration with Apple Industries, developed an interactive photo booth where fans pose alongside iconic Marvel characters. Located at the Charlotte Premium Outlets, this activation offers a unique touchpoint for the brand, providing an immersive, year-round experience that enhances engagement and keeps fans connected, regardless of movie release schedules. For brand marketers, this innovative approach demonstrates the power of creating memorable, interactive experiences that foster deeper connections with the audience, driving sustained engagement and loyalty.





# Global Market TORONTO

Largest city in Canada with the  
most sponsorship deals of any  
Canadian market



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1	Rogers Communications	6	Fallsvew Casino Resort	11	FanDuel
2	BMO - Bank of Montreal	7	TD Bank	12	Pokerstars
3	National Bank of Canada	8	Sobeys	13	Maple Leaf Foods
4	Mastercard	9	Bell Media	14	OLG Ontario Lottery and Gaming
5	Scotiabank	10	PointsBet	15	JackpotCity

## PointsBet and FanDuel lead as Toronto's betting scene heats up

The 2021 legalization of single-event sports betting in Canada has led to fierce competition between betting brands in Toronto. There are currently more than 9 active betting brands in the market, with the top 5 brands—PointsBet, FanDuel, Pokerstars, OLG, and Jackpot City—accounting for nearly 180 sponsorship assets combined. The betting brands category ranks second in asset numbers (right behind banks).



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

1

**Financial**  
315+

2

**Alcoholic Beverage**  
300+

3

**Gaming**  
225+

4

**Food Products**  
220+

5

**Quick Serve Restaurants**  
165+

6

**Retail**  
150+

7

**Telecommunications**  
140+

8

**Hotel, Restaurant, Leisure**  
130+

9

**Apparel & Accessories**  
125+

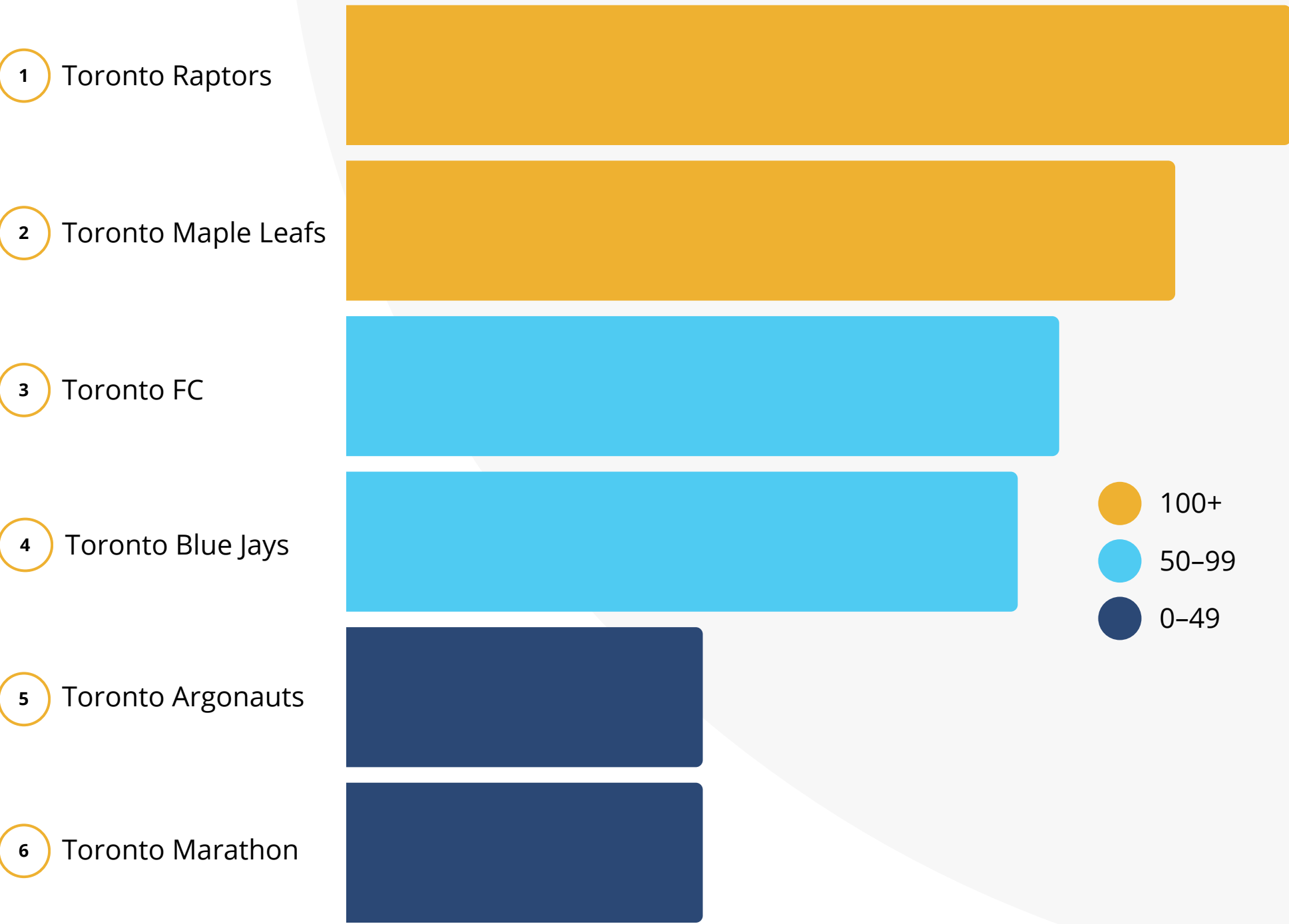
10

**Non-Alcoholic Beverage**  
120+



# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship assets across sports and music



**Gradey Dick**  
Toronto Raptors



# Pro Sports Team Insight

A hotbed for women's professional sports

Toronto is poised to become a hub for women's professional sports, highlighted by the launch of the Professional Women's Hockey League (PWHL) and the city's upcoming WNBA expansion franchise. Brands looking to get involved and support gender equity in sports can take cues from existing initiatives. For example, the National Bank of Canada's sponsorship of the ATP tournament features *Game. Set. Equity.*, a program dedicated to enhancing women's participation and leadership in tennis. Similarly, Nike's *Made to Play* initiative, in partnership with the City of Toronto, aims to expand sports opportunities and leadership for women and girls. Additionally, with Maple Leaf Sports & Entertainment's (MLSE) investment in the new WNBA team, its 19 brand partners—including AWS, Tim Hortons, and Canadian Tire—will be able to engage with a new fan base.

**5.8M**

average social following of Toronto major pro sports on social media

**#2**

social follower ranking of Toronto's team across the PWHL

**+70%**

average social follower increase combined across WNBA teams

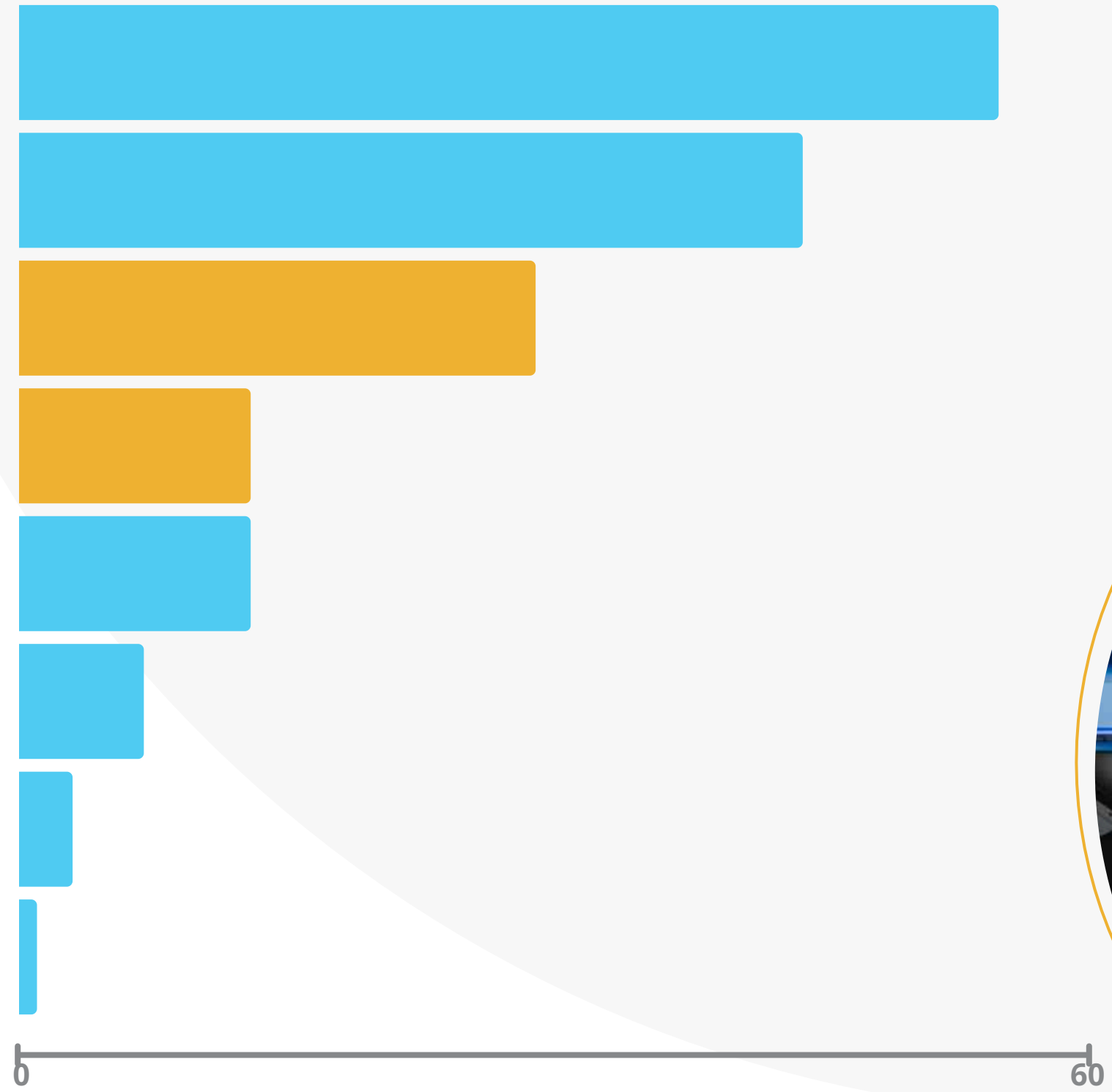




# Concerts and Music Venues with the Most Deals

○ ○      ○ ○      ○

- 1 Sound of Music Festival
- 2 North by Northeast Festival and Conference
- 3 Toronto Jazz Fest
- 4 Veld Music Festival
- 5 History Toronto
- 6 Electric Island
- 7 Budweiser Stage
- 8 RBC Echo Beach





# Active Brand Categories Beyond the Stadium

- 
- The infographic features a light gray background with a large, faint, stylized number '10' in the center. On the left side, there is a vertical list of numbers 1 through 5, each enclosed in a yellow circle. To the right of each number is the name of a brand. On the right side, there is a vertical list of numbers 6 through 10, each enclosed in a yellow circle. To the right of each number is the name of a brand. The brands are listed in descending order of revenue.
- | Rank | Brand                                   |
|------|---|
| 1    | Real Estate Agencies                    |
| 2    | Non-Athletic Apparel & Footwear         |
| 3    | TV/Streaming Networks & Studios         |
| 4    | Health Causes, Charities & Associations |
| 5    | Cosmetics & Skin Care                   |
| 6    | Colleges & Universities                 |
| 7    | Pharma                                  |
| 8    | Banking                                 |
| 9    | Athletic & Footwear                     |
| 10   | Snacks                                  |



## Cheetos captivates Toronto with high-profile campaign

For the 2024 NHL All-Star Weekend in Toronto, Cheetos extended its nationwide Cheetle campaign, celebrating the playful residue left on fingertips when eating Cheetos. This multi-themed campaign connected with a diverse audience demographic by featuring the prominent Bauer hockey glove statue, ads with Canadian actor Simu Liu, and Christmas-themed activations across various locations in the city. The campaign successfully captured eyeballs with its striking visuals and high-profile placements, significantly boosting brand visibility. Other brands can replicate this success by leveraging a culturally resonant theme, incorporating impactful visual elements or local celebrities, and aligning brand messaging with significant local events, ensuring their campaign is multi-faceted and widely accessible.



# Global Market **LONDON**

Largest city in the UK with the  
most sponsorship deals of any  
European market



# Most Sponsorship Exposure for Brands



- |   |                  |    |                  |    |              |
|---|------------------|----|------------------|----|--------------|
| 1 | cinch            | 6  | adidas           | 11 | Tag Heuer    |
| 2 | Nike             | 7  | Castore          | 12 | London Pride |
| 3 | Emirates         | 8  | eToro            | 13 | Gtech        |
| 4 | Betway           | 9  | DHL              | 14 | Socios.com   |
| 5 | American Express | 10 | Infinite Athlete | 15 | Kia          |

## London's sponsorship market thrives with local and international brands

Nike and cinch have been dominant players since 2022, leveraging high-visibility sponsorship assets (jersey patches, for example). The London market features a near-even split between domestic (47%) and international (53%) brands,\* reflecting both local commitment and worldwide interest in London's sponsorship opportunities. Reflecting the strength of regional partnerships, 77% of domestic brands are based in London. Tech brands such as Infinite Athlete and IBM are driving the rise in this category, illustrating how the integration of advanced technology in sports sponsorships creates synergies that enhance business collaboration with rights holders.

*\*Considering brands with five or more sponsorship assets*



# Most Sponsorship Exposure for Categories



- 1

**Financial**  
275+
- 2

**Technology**  
250+
- 3

**Apparel & Accessories**  
225+
- 4

**Construction & Industrial**  
180+
- 5

**Alcoholic Beverage**  
150+
- 6

**Non-Alcoholic Beverage**  
135+
- 7

**Auto**  
135+
- 8

**Transportation**  
115+
- 9

**Business Services**  
95+
- 10

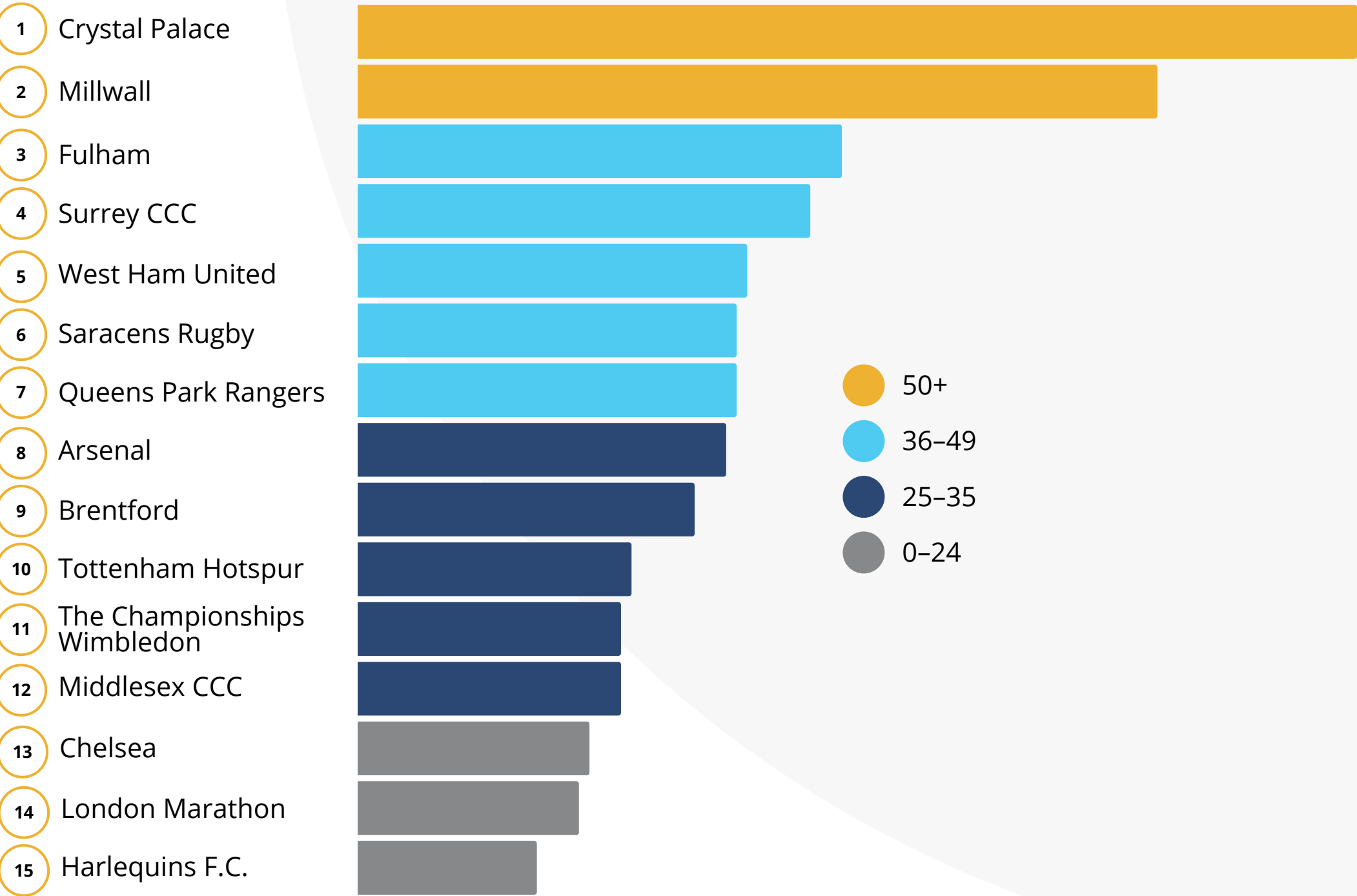
**Gaming**  
95+





# Pro Sports Properties with the Most Deals

Ranked by number of sponsorship deals



**Jean-Philippe Mateta**  
Crystal Palace





# Pro Sports Team Insight

## London soccer sees surge in women's sponsorships and dual-team deals

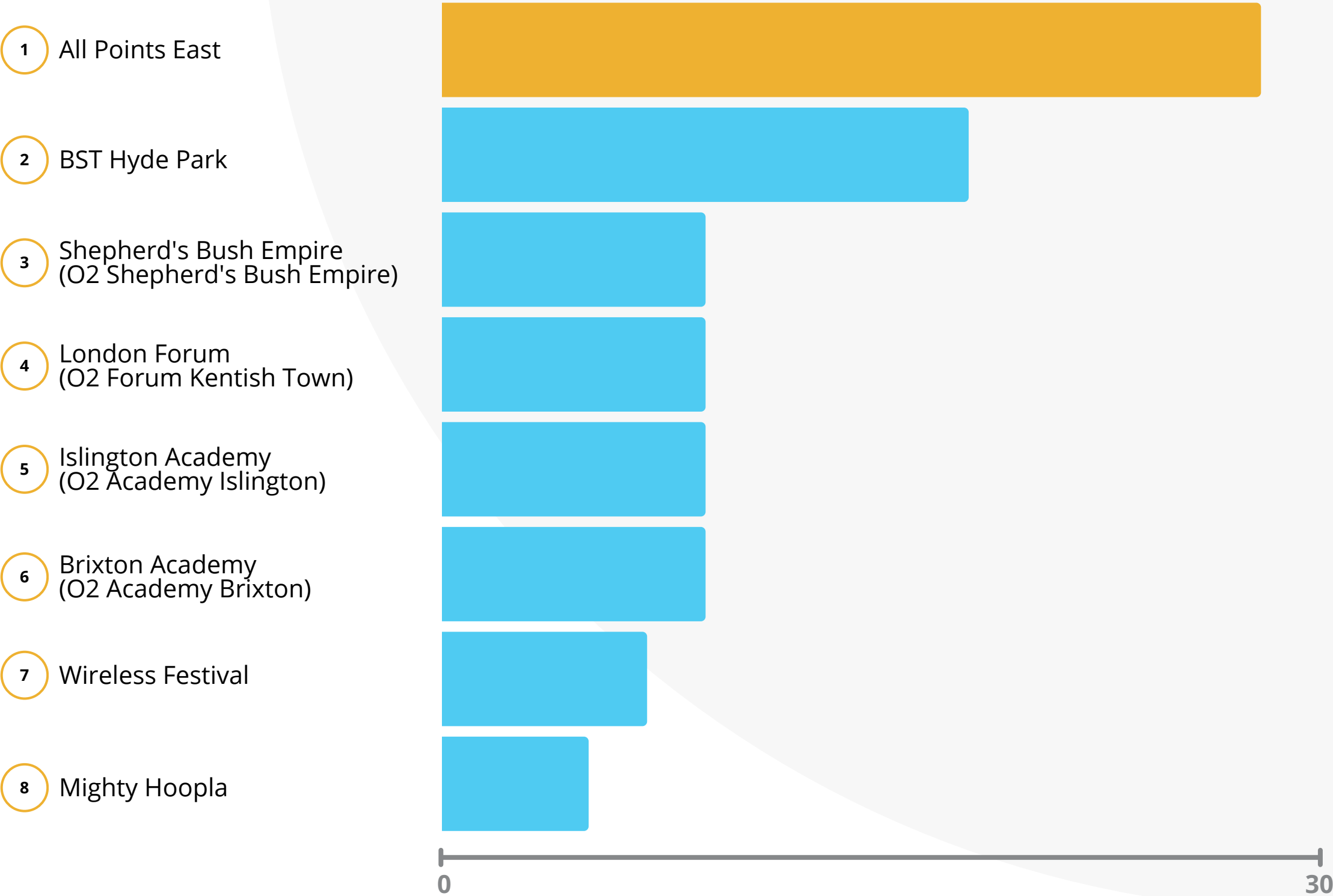
About one-third of the soccer league's total teams—comprising seven Premier League teams and four Women's Super League teams—are in London, creating a fiercely competitive sponsorship environment. The men's teams average 42 sponsors (a modest 2.5% growth from 2022), while London's women's teams are on the rise with an increase of 35% since 2022 (reflecting an average of 12 sponsors). This surge in women's sponsorship deals is partially attributed to the growing trend in bundled sponsorships. For example, 79% and 88% of sponsors for Arsenal and Tottenham Hotspur women's teams, respectively, also partner with the men's teams. These findings suggest that brands like Betway and Electronic Arts are increasingly recognizing the value of dual-team sponsorships, leveraging both men's and women's teams to maximize market reach and engagement.





# Concerts and Music Venues with the Most Deals

Ranked by number of sponsorship deals



**Lucky Daye**  
All Points East



# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |   |                                       |    |                               |
|---|---------------------------------------|----|-------------------------------|
| 1 | Concerts, Festivals, Shows & Theaters | 6  | Museums, Zoos & Entertainment |
| 2 | Non-Athletic Apparel & Footwear       | 7  | Snacks                        |
| 3 | Soft Drink & Carbonated               | 8  | Beer (Non-US)                 |
| 4 | Banking                               | 9  | Airline                       |
| 5 | Colleges & Universities               | 10 | Water & Specialty Water       |

## Pepsi Max captures attention with OOH innovation

Pepsi Max took off this past year in terms of OOH activations. As a major UEFA partner and fueled by the Champions League final hosted in London, Pepsi Max featured their signage on five different advertising formats. Both innovative and intriguing were the activations using drone lights and CGI. The latter, showcased on the Thames, had a hand in the unveiling of the brand's new visual identity. This exemplifies the purpose of these types of activations—to craft memorable brand experiences that push boundaries and create a lasting impact on the audience.





# Global Market MADRID

Largest city in Spain with the  
most successful football team  
in the Champions League



# Most Sponsorship Exposure for Brands

Ranked by number of sponsorship assets across sports and music

1	Mahou	6	Nike	11	CaixaBank
2	Emirates	7	Mutua Madrilená	12	Ria Money Transfer
3	adidas	8	Solan de Cabras	13	Orange
4	Hyundai Motor	9	Riyadh Air	14	Comunidad de Madrid
5	Ayuntamiento de Madrid	10	Coca-Cola	15	Movistar

Global Market  
**MADRID**

## Enduring partnerships define Madrid's sponsorship landscape

Despite a 7% increase YoY in the number of brands investing, 90% of 2022's most active brands continue to maintain their positions in the Madrid sponsorship space today, highlighting consistency and commitment within the market. This stable environment is exemplified by the long-term partnerships and enduring alliances between LaLiga teams and major brands, Mahou-Real Madrid and Nike-Atlético Madrid.



# Most Sponsorship Exposure for Categories

Ranked by number of sponsorship assets across sports and music

1

**Financial**  
135+

2

**Auto**  
125+

3

**Alcoholic Beverage**  
125+

4

**Apparel & Accessories**  
110+

5

**Transportation**  
85+

6

**Non-Alcoholic Beverage**  
75+

7

**Government**  
70+

8

**Healthcare**  
60+

9

**Consumer Products**  
60+

10

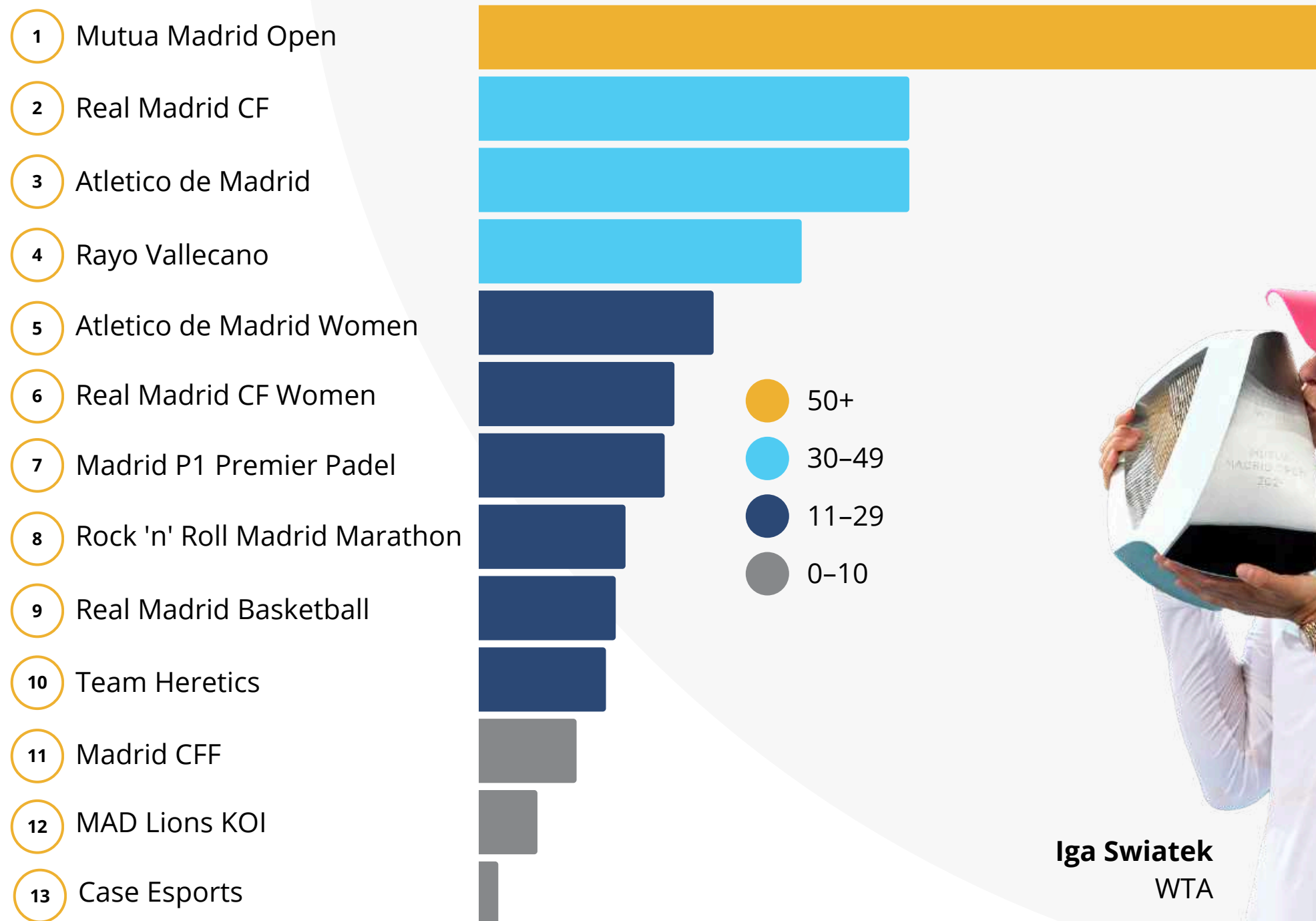
**Telecommunications**  
50+





# Pro Sports Teams with the Most Deals

Ranked by number of sponsorship deals



**Iga Swiatek**  
WTA

## Sponsorship dynamics shift in Madrid's sports scene

The Mutua Madrid Open saw a substantial 81% growth in sponsorship deals since 2022, primarily driven by its pivotal upgrade to a Masters 1000 event in 2023. This advancement expanded the ATP main draw to 96 players (up from 56) and extended the event duration from 8 to 12 days, boosting attendance and TV coverage, which attracted more brand sponsorships. Meanwhile, similar to market trends in the US, esports sponsorships have waned, with rights holders like Team Heretics and MAD Lions KOI experiencing declines. Domestic brands are increasingly investing in emerging sports, however, demonstrated by the growth of Madrid P1 Premier Padel.

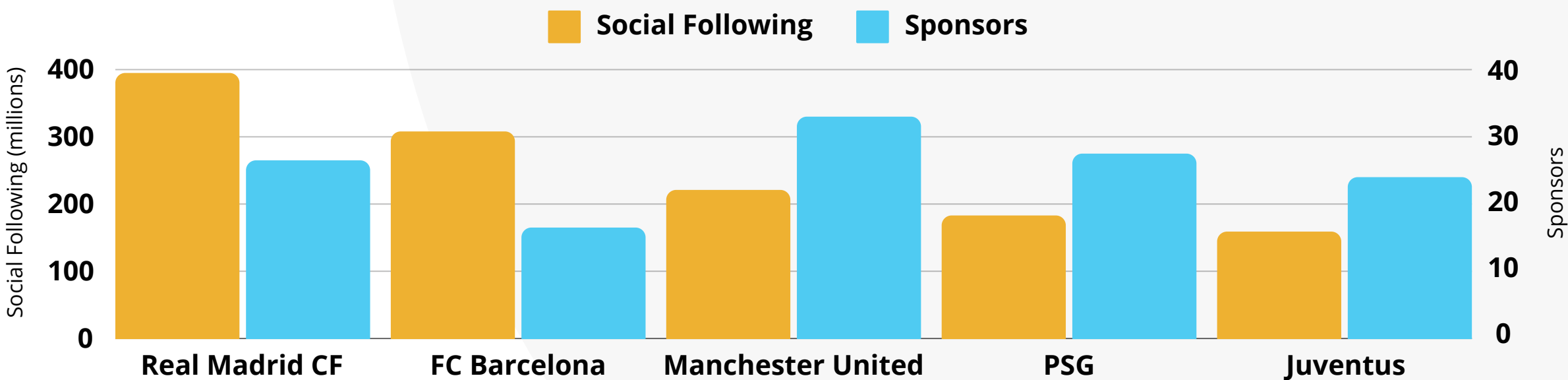


# Pro Sports Team Insight

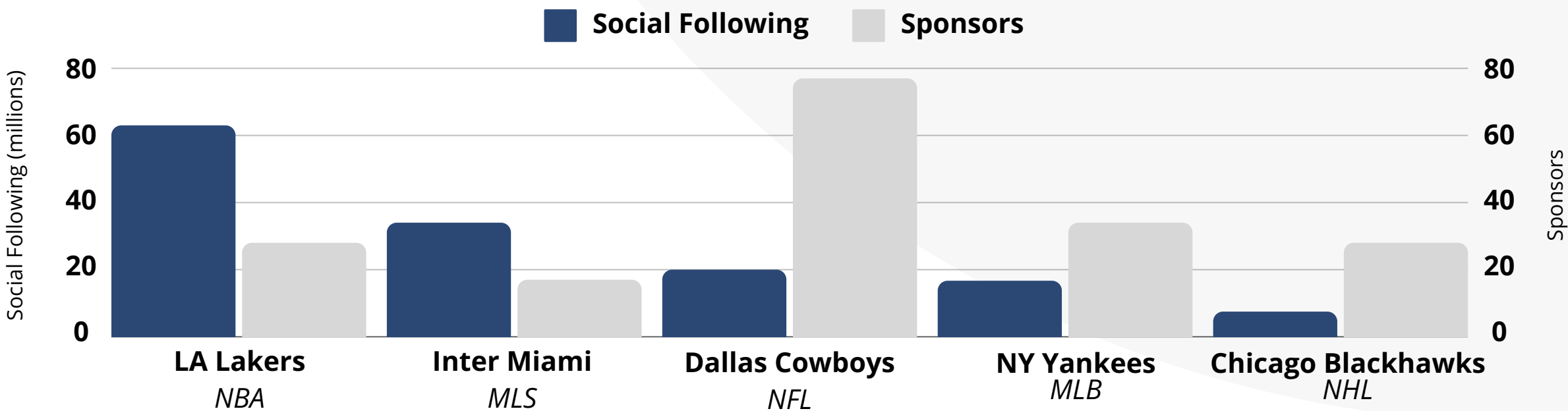
Real Madrid CF serves as prime example for global sports teams

Global Market  
**MADRID**

Top Followed Teams Worldwide



Top Followed Team in Each Major Pro Sports League



## A global powerhouse in sponsorship and fan engagement

Real Madrid, the recent Champions League winner and arguably the most successful club of the last decade, boasts on-field success, the largest global fanbase, and a recently renovated \$2 billion state-of-the-art venue. With nearly 400 million social media followers—6 times more than the Lakers (the top US team)—Real Madrid leverages this vast reach through strategic regional partnerships, gaining a competitive edge in markets like Latin America (where a substantial fanbase resides and many of its players originate). The club's global appeal is showcased through its sponsorship deal with Peruvian energy drink Group AJE and its 34 international brands. Real Madrid also expands its fanbase and enhances engagement in the US with initiatives like the US summer tour sponsored by HP and a partnership with Texas-based Ouro.



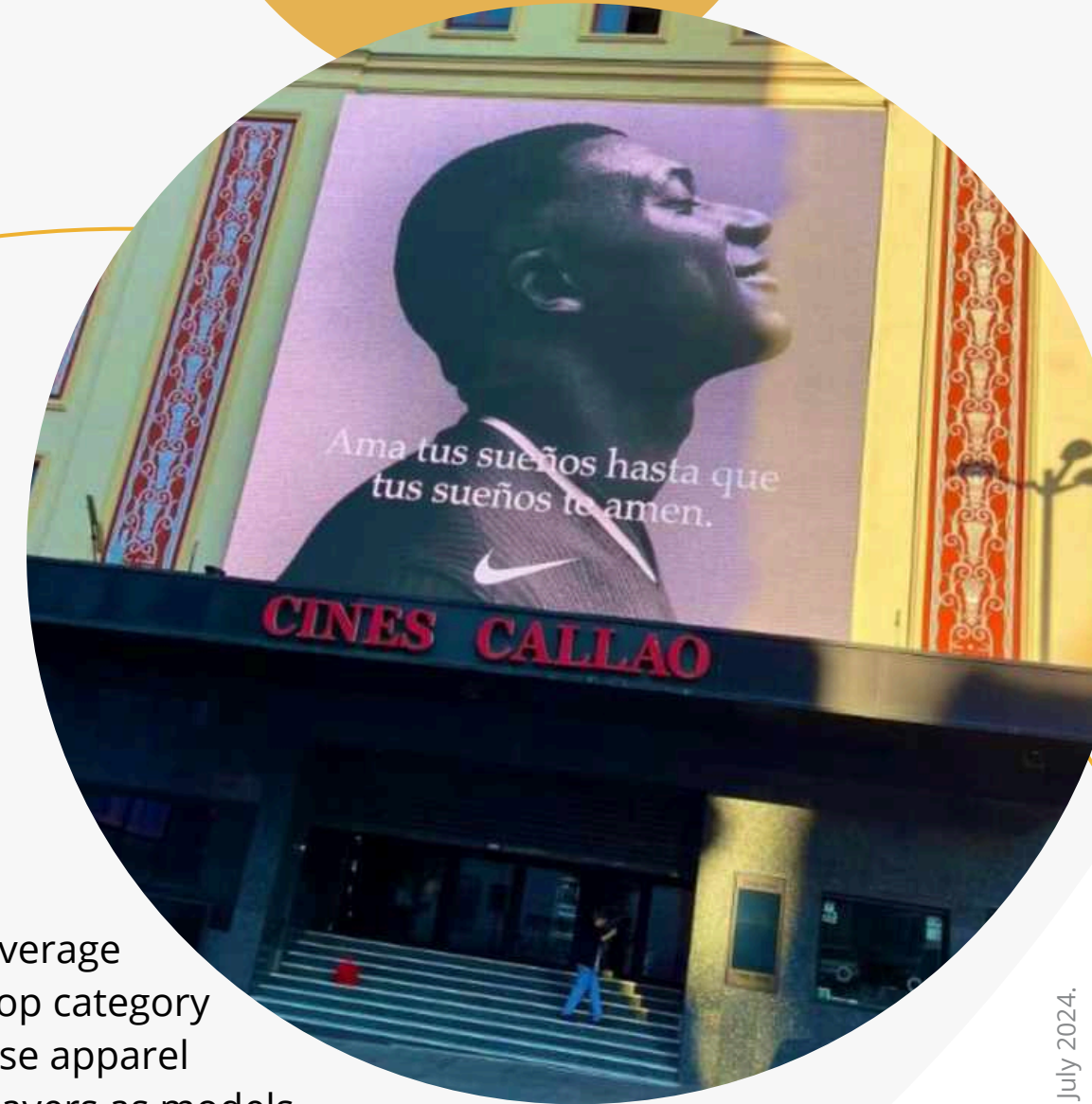
# Active Brand Categories Beyond the Stadium

Ranked by number of OOH advertising assets

- |                                   |                                     |
|-----------------------------------|-------------------------------------|
| 1 Non-Athletic Apparel & Footwear | 6 Mass Merchant & Department Stores |
| 2 Soft Drink & Carbonated         | 7 Beer (Craft)                      |
| 3 Athletic & Footwear             | 8 Tourism                           |
| 4 Watches & Jewelry               | 9 Consumer Electronics              |
| 5 Apparel, Footwear & Accessories | 10 TV/Streaming Networks & Studios  |

## Soccer legends dominate OOH apparel ads in Madrid

Over 40 brands from 16 categories actively leverage out-of-home advertising in Madrid, with the top category being non-athletic apparel and footwear. These apparel brands more often than not feature soccer players as models, capitalizing on both the immense popularity of players and the aspirational connection they have with consumers. This strategy enhances brand visibility, engagement, and loyalty. The presence of 12 different apparel brands on billboards and vehicles highlights the effectiveness of using sports icons to capture the attention of a mobile audience, making OOH advertising a powerful marketing tool in Madrid.





## Methodology

This report offers an in-depth analysis of brand sponsorships, out-of-home advertising, and social engagement across nine different markets over 18 months, encompassing more than 3,200 brands and 220 asset types from January 1, 2023 to June 5, 2024.

Rights holder types for each market include:

- North American major pro sports: NFL, NBA, MLB, NHL, MLS, WNBA, NWSL, and CFL
- Music festivals and venues
- Out-of-home advertisements
- European pro sports: football, basketball, tennis, rugby, cricket, and esports
- Global tournaments: tennis and golf
- Marathons, triathlons, and road races

Sponsorship data was gathered from multiple sources, including observed brand placements in game and during broadcasts, team websites, and official announcements. By focusing on the number of sponsorship assets rather than the number of sponsorship deals, we provide a more nuanced understanding of market impact. This approach highlights that some brands—despite having fewer deals—have more extensive asset portfolios, offering a richer sponsorship presence. This report was jointly authored by SponsorUnited's Marketing, Research, and Analytics teams. Data for this report was sourced from SponsorUnited's extensive database, which tracks and analyzes sponsorship activity across all major sports leagues and entertainment rights holders.





# Thank You

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Want more insights?  
Email [info@SponsorUnited.com](mailto:info@SponsorUnited.com)