

World Market for Professional Sports

July 2024

Table of Contents

INTRODUCTION

Scope Main trends driving the sports industry

STATE OF THE INDUSTRY

Sports in 2024: driving investment and retaining fan engagement amidst fears of recession Annual overview: US and European football leagues dominate; AFL makes it into top 10 Annual overview: European football wins the lion's share of global attention North America remains top sports market for live attendances NFL dominates live attendance globally, with European football/soccer leagues on its tail Giants within the leagues propel Premier League and La Liga popularity online Top European football teams amass stellar digital following Finance and insurance companies lead commercial partners' landscape Share of foreign sponsorships increases hinting at globalization of sports Sponsorship Valuation Model: understanding deal values in major team sports leagues Sponsorship Valuation Model: different categories emerge as key across the two regions Sponsorship Valuation Model: 18% of sponsorship value remains untapped Sponsorship Valuation Model: NFL, NBA make up half of sponsorship value in North America Sponsorship Valuation Model: premier league retains dominance in Western Europe Sponsorship Valuation Model: apparel and footwear leads with highest sponsorship spend Sponsorship Valuation Model: Nike and adidas come on top of other sponsoring brands Sponsorship Valuation Model: key insights

MAIN TRENDS SHAPING THE INDUSTRY

Key trends shaping the sports industry Sports continue to invest in their entertainment offering to keep fans engaged Al redefining the sports industry, but authentic communication remains key Euro 2024 and Paris Olympics look to expand borders of sustainability and inclusivity Competition for live sports broadcast builds up with more OTT providers

MARKET & INDUSTRY SNAPSHOTS

Regional Club Index 2024 results: Europe and North America Regional Club Index 2024 results: Latin America and Asia Pacific Industry snapshot: Apparel and footwear Industry snapshot: Finance and insurance Industry snapshot: Airlines Industry snapshot: technology, media, telecom (TMT) Industry snapshot: automotive

APPENDIX

Sports coverage 2024

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus

of operations, their competitors, their geographic presence and performance.

• Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/world-market-for-professional-sports/report.