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FAN LOYALTY AS MAJOR DETERMINANT FOR USING DATA ANALYTICS IN SPORT
SPONSORSHIP

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Abstract

Data analytics is a substantial element of today's marketing communication. Nonetheless, marketers, sponsors and researchers lack a holistic and comprehensive understanding of key determinants for using analytical tools in sports sponsorship. There is an agreement around the role of data analytics in driving revenues, however researchers do not delve into the sports fan loyalty as major determinant for using data analytics in sport sponsorship. The purpose of this thesis is to understand how the loyalty of the sports consumer should be the driver for organizations to employ data driven strategies. Both qualitative and quantitative methods were applied, through conducting semi-structured interviews with industry experts and an analysis of secondary data collected from company reports. Results suggest that the sports consumer is different than other types of consumers, and that trends in sports sponsorship are driven and influenced by fan loyalty.

Keywords: Fan Loyalty, Sport Sponsorship, Data Analytics, Fan Engagement.

1. Introduction

The global sports sponsorship market was worth an estimated 57 billion U.S. dollars in 2020 and is expected to grow to almost 90 billion U.S. dollars by 2027 (Statista 2021). The market is mainly dominated by football, capturing the largest market share a 36.05% in 2020, with basketball accounting for 17.84% share of the global sports sponsorship market (Brand Essence 2021). The growing number of sports events and the fact that sponsorships have a larger reach in comparison to traditional marketing such, is expected to boost the sports sponsorship market more over the predicted years (Nuseir 2020). Comparing this to arts and cultural events: While the overall number of people attending these events is higher than the attendance at sporting events, sport has the advantage of being widely broadcasted (Brand Essence 2021). Therefore, to answer the question of whether to invest in data analytics or not, it is important to take into consideration the unique aspect of sport sponsorship compared to other industries. In fact, the use of data analytics is surging in all industries, and sports are no exception. It is not surprising that 90% of the data in the world was generated over the last two years alone (Polemitis 2019). Data analytics ensures that the fan's attention is not limited to game time. In a nutshell, it ensures the game never ends (PwC and Exozet 2014).

Moreover, companies are becoming more aware that re-engineering their Return On Investment (ROI) processes will provide them with deeper marketing analytics and measuring tools. As a result, they can determine the right price to pay for sponsorships, facilitate activation strategies and optimize investments (MANOUKIAN 2018). Sport consumers have traditionally been thought to exhibit unique behaviors from traditional consumers, particularly in respect to loyalty (Fujak 2018). Ergo, industry professionals at all levels need to be aware of the changing needs and desires of sports fans. Everyone within a club is responsible for fan experience and brand

perception, from marketers and technology professionals to commercial teams and customer service personnel (Tappit 2021).

This research aims at answering the question: What is the main determinant for using sponsorship analytics?

Key elements of the sports fan loyalty and sponsorship trends will be defined in the literature review and later analyzed using different research methods.

2. Literature review

2.1 Defining the relationship between sport sponsorship and data analytics

“Data is the new oil”, is a phrase originally proposed by Clive Humby (Mavuduru 2020). Whatever comparison you try to give to data’s value, “it is the fundamental ability to extract, refine and convert the information from a myriad of data sources”, this is what makes data useful and therefore of almost limitless value (Morgan 2021). Sponsors need that value. They need to be able to measure and evaluate their sponsorship outcomes to make their decision-making process more efficient.

A question has been rising lately in the sports field; Who exactly are those fans that keep showing up to the stadium? Data analytics is there to address this question by giving a deeper understanding of sport consumers. This gives sponsors access to richer data that will enable more focused sponsor targeting and authentic engagement, additional opportunities for customization and additional ideas for post-game outreach (Deloitte 2017).

Sports fans engage themselves in numerous forms of behavior to lend support to their favorite sport clubs (Pradhan, Malhotra and Moharana 2020), resulting in production of data characterized by its high volume, variety and velocity. This data has been shown to be useful for sponsors to

assess consumers' opinions and attitudes, consumer segmentations, products/services' preferences, and promotional campaigns (Mamo, Su and Andrew 2021).

2.2 Consumer loyalty among fans of sports clubs

Oliver defines customer loyalty as “a deeply held commitment to rebuy or repatronize a preferred product/service consistently in the future, thereby causing repetitive same brand set purchasing, despite situational influences and marketing efforts having the potential to cause switching behavior” (Yen Nee Ng, Kee Mun Wong and Ma 2017). In the context of sports, a tangible way of identifying such loyalty is the amount of season tickets and/or premium seats purchases (Dalakas, Tseng and Melancon 2021). In the sports sector, the expected outcome of having loyal fans is associated with the amount and frequency of game attendance, the purchase of team merchandise, following the club's results in the media, and participation in discussions about the club. Whereas the level of loyalty is determined by team identification and fan's satisfaction with the team's performance (Kościółek 2019).

While many industries face the problem of declining brand loyalty, the sporting industry has lifelong fans that demonstrate tremendous devotion, even to teams with a long history of poor performance (Samra and Wos 2014). Certainly, fans do not all have the same level of loyalty and commitment to their respective teams, hence, there exists different measures of fandom. From literature we can identify a spectrum with three levels of fandom (Appendix 1). First, the occasional fan, who is not much connected to the team or the athletes. Watching sports can be a socialization experience for them, which is why this group can also be identified as social fans. Second, we find the regular fan, who watches their team regularly but has a moderate connection to it, meaning that if the team does not win, it can drive the fan away. At the end of the spectrum, we find the “daily fan”, who is involved and connected to the team, also defined by Sutton as the

“vested fan”. With vested fans, commitment manifests itself in long term affiliation with the team, in significant time and money expenditure, and in loyalty despite results. Meaning, commitment persists even when clubs are not performing well (Johnston 2016). Taking fandom into consideration, sponsorships play a huge role on how brands are perceived, and therefore on the consumers behavior towards the brand.

The National Sponsorship Index (NSI) was created by Professor Tony Meenaghan from Dublin University College, Jamie Macken and Mark Nolan who are both from the Core Ireland agency. This index is based on three key building blocks: Fandom (fan numbers and the intensity of fan passions), Goodwill (the respondent’s beliefs that benefit is being delivered by the sponsorship to the property and/or to the fan’s interaction with the property) and Linkage (sponsorship awareness among fans) (WARC 2019). Data from national surveys revealed that fan goodwill leads to fan gratitude and reciprocation through higher time and money investment in the brand. The NSI shows that sponsorships can have an uplifting impact on commercial metrics (30% growth in performance) and outlines how that uplift is more than doubled (71%) when consumers feel that their experience has been enhanced or a benefit has been transferred to the sponsorship property itself (Marketing.ie 2021). Sports fans are loyal, so they care deeply about the details of the sponsors, and what they bring to the table. They need to know that their teams are receiving benefits and that sponsors are keeping their promises. Sponsors can use this characteristic to their advantage to drive revenues.

2.3 Market data and trends

2.3.1 The rise of athletes as influencers

Athletes feel increasingly empowered to utilize platforms such as Instagram to influence large audiences. In fact, the continued rise of athletes as influencers requires new methods of

measurement to understand reach and impact (Nielsen sports 2021). With the growth of athletes branded content (Appendix 2), marketers shift more to the endorsement and association marketing strategies. Ronaldo with his 158 million followers across Facebook, Twitter and Instagram, became bigger than most brands (Performace Communications and Canvas8 2016). According to Nielsen Sports on the changing value of sponsorship, athlete advocacy posts generate 63% more engagement for brands compared to other owned social media content (Nielsen Sports 2021). Athletes with many followers help amplify social campaigns, that is why brands seek sports figures who can promote their own social causes and values through platforms offered by rights holders. According to the same report, rights holders with a sustainability agenda can expect revenue growth of 11% over the next three to five years (Nielsen Sports 2021).

2.3.2 Year-round fan engagement

Using data, sponsors and rights holders can measure fan engagement, which further helps measuring key metrics such as intention to purchase, brand awareness, and generated leads (Biscaia, et al. 2013). In effect, there is a growing demand for content by the sports fan not only during the games, but also before, after and in between the games. Whilst sport was born out of the match or matchday experience, the demand for analysis and preview content have morphed into an always-on content opportunity (Stats Perform 2021). One of the key findings of the survey conducted by Stats Perform, is that 53% of the respondents believe there is a growing need for always-on content (Appendix 3).

If a fan engages year-round with their team, including the off-season, they are most likely going to buy tickets or merchandise. A survey was conducted by Deloitte to understand the attributes of year-round fan engagement. The survey highlighted that 95% of fans today have some form of interaction with their favorite team or league in the off-season, and that more than 60% of fans say

a great “year-round experience” would make them more likely to be more engaged with the team in the coming season (Deloitte 2020). Data analytics is therefore crucial to capture and understand fans behaviors and needs, to then utilize the insights collected to customize content generated and drive engagement. The higher fan engagement is, the higher sponsorship revenues will be. In-depth content that is personalized is closely associated with higher sport consumer spending (Appendix 4).

2.3.3 Broadcasting innovations

According to the Deloitte report on the future of sports broadcasting, there are four main broadcasting innovation that we see today across teams and leagues: Augmented reality (AR), Virtual reality (VR), Subscription model and announcer choice. For instance, Amazon debuted a choice of announcers for its slate of Thursday night NFL games, with viewers given the choice between the Fox crew and the Amazon team, made up of the first-ever all-female NFL broadcast team (Deloitte, 2019).

Another technology that has been playing a huge role on broadcasting games is drones. What is currently being used is flycams, attached from above to a wire. However, with drones, viewers can have a better sense of being in the action. Some safety regulations are being reviewed, but soon, drones will be game changers when watching live sports events (Deutsch, et al. 2019).

Due to the Covid-19 pandemic, global sponsorships suffered a massive decline in 2020. Game attendance rates in major leagues has never been lower because no live sport means no live coverage. Therefore, sponsors could not use their resources to launch their marketing, social media engagement, and all other activities associated with the rights and assets they’ve acquired (Johan Cruyff Institute 2020). As a result, sponsorship deals dropped by 40% by March 2020 (Nott 2021).

However, statistics show that even before the pandemic, game attendance for many sports has been decreasing in the past three years. NFL teams averaged 66,648 fans at home during the 2019 regular season, which is the lowest figure since 2004 (Broughton and Levin 2020). Even though no experience is like live experience, sports consumption has been shifting towards digital (Appendix 5).

Fans are engaging more and more through communication channels. This engagement is made easier when the game is watched from a screen at home while being able to use other screens. 80% of sports viewers say they use a computer or smartphone when watching live games on TV, and the reason they use other screens, is to look for the athletes' statistics, see scores of games happening at the same time, contacting other fans and watching related videos (Damagaard 2018). This shows that sports consumers would give up the live experience to interact and engage with their teams. And this kind of loyalty makes sports consumers compared to other types of consumers, exceptionally engaged.

2.4 Literature gap

Various literature covers the meaning of data analytics and its importance in sport sponsorship.

When thinking from a goal perspective, the answer to the question, “why should we use data analytics in sport sponsorship?”, is the same by most researchers. On one hand, there is agreement around the fact that data analytics is needed to drive revenues. Researchers have always looked on the aspects of data analytics such as increase of ROI and sponsorship valuation. Researchers explored mainly how analytical techniques are used in sponsorship to build long-term brand attributes. And by building brand strength, which accounts for 60% to 80% of total sales, data analytics becomes critical to sustain long-term sales growth (Jacobs, Jain and Surana 2014). On

the other hand, there is also various research covering the definition of customer loyalty, and loyalty amongst sports fans. Yet, fan loyalty was overlooked by researchers as a driver to use data analytics even though the trends identified in literature review demonstrate that the sports consumer is different from other consumers, and that fan loyalty is different from common customer loyalty.

3. Methodology

After conducting the literature review and identifying the literature gap, quantitative research was carried out by looking at secondary data. The goal is to answer the question “what makes the sports consumer unique and what are their specific characteristics?”.

For more accuracy, and less sampling limitations, data was retrieved from surveys conducted by companies in the form of reports studying matters such as loyalty and fan engagement.

At the same time, qualitative research was conducted in the form of semi-structured interviews with industry experts to get deeper insights on the future of sponsorship analytics and how fan loyalty impact sponsorship activities.

3.1 Quantitative Research

3.1.1 Quantitative Research Data Collection

To get a quantitative outlook, a thorough analysis of different surveys and one industry reports has been conducted. These surveys have been led by companies in the form of studies on matters such as loyalty and fan engagement.

This data collection method gives a comprehensive overview because each survey covers a complementary aspect of the research question. For instance, Deloitte developed a loyalty

scoreboard exploring fan engagement. Gensler's 2013 Brand engagement survey goes deeper, exploring the emotional power of brands in general. The third report is also another Gensler's survey illustrating an investigation into sports fans' relationships with their favorite teams. This relationship is further explored in the survey conducted by Performance Communications offering a thorough analysis of the trends in sport sponsorship and how they are impacting a representative sample of fans across a range of different sports. The fifth survey is in the form of an infographic on Customer Acquisition versus Retention Costs, compiled and designed by Invesp, a conversion rate optimization company. By looking at those surveys together, it becomes possible to identify the characteristics of the sports fan and understand their loyalty.

3.1.2 Quantitative Research Results and Analysis

Four criteria of the fan have been identified.

1. Money and time invested

Gensler categorized their respondents into high-emotion and low-emotion groups, according to their level of engagement with their favorite brand. Results show that 76% of high-emotion customers purchase their favorite brand often or very often, versus 58% of low-emotion customers (Appendix 6). Additionally, 65% of high-emotion customers already own a lot of their favorite brand's products (Gensler 2013).

When emotion is involved, customers have higher willingness to pay. Even customers with low emotion, more than 58% purchase their favorite brand often or very often. It is important to understand the impact of emotion on consumer behavior. In the case of sport teams for instance, consumers have emotional attachment to the team, and therefore can develop the same emotional attachment to the brand. For brands, understanding that "emotion pays" should be a driver to use

data analytics to better differentiate their fans, and target them according to their specific characteristics.

In Gensler's survey, consumers were also asked if they would be willing to spend more on their favorite brand's products even if they can find the same ones at lower prices but without the brand name. The graph shows that 43% of respondents said they're willing to do it, and 29% already did (Appendix 7)

As the graph also shows, it is not only about the money invested but also the distance customers are willing to go. Surprisingly, more than 50% of the respondents are willing to or already do travel more than 50 miles for their favorite brand. Similarly, when invested emotionally, they are willing to wear the brand's logo; only 19% said they wouldn't be willing to. In a way, these consumers want to show to the world a part of their identity; that is the brand, and what it stands for. This explains why 94% of them said that they are likely or very likely to recommend their favorite brand to friends and family.

Because the sports consumer is emotionally connected, they would demonstrate deeper engagement to the brand, through investing time, money, and even part of their personal image. Wearing the logo of a brand means that the consumer is happily accepting being identified as that brand and telling the world that they are associated to the brand.

Instead of high-emotion and low-emotion fans, Deloitte categorized their survey respondents into self-described fanatics and casual fans. Results showed that self-described fanatics spend six times more than self-described casual fans. It reinforces the idea that sports fans are willing to spend money for memorable experiences, particularly millennials. For instance, when non-millennials are willing to pay more than 16 dollars for pre/postgame events, millennials are willing to spend

more than 20 dollars. Also, non-millennials are willing to spend more than 17 dollars to greet and meet with the player, compared to millennials who are willing to pay more than 26 dollars for the same experience (Deloitte 2015). Similarly, with regards to seating based on social interests, millennials are willing to pay more than 21 dollars as opposed to non-millennials who are willing to spend more than 14 dollars.

To understand spending behavior of sport fans, Deloitte also divided respondents into season ticket holders and non-season ticket holders (excluding ticket purchases). Results revealed that season ticket holders spend five times more annually than non-season ticket holders.

This data confirms the need to invest in understanding the different profiles of fans, their emotional investment and their spending behavior on their favorite teams. Understanding their specific needs, such as the need for memorable experiences by millennials, will help marketing decision making, retain customers or even make fans go from casual to fanatics. However, it all starts with a comprehensive understanding of the distinctive profile categories, which can only be done with the use of analytics. The same logic applies to season holders and non-season holders; the difference in spending behavior is large, and therefore marketing communication should be different when targeting these two groups.

2. Long-term commitment to the brand

Performance Communication found that 90% of their survey respondents believe anyone can be a sport fan. This implies that brands should have an investment structure that is more focused on making fans loyal rather than trying to acquire fans. Brands should be aware that effort should be made in retention rather than acquisition. According to Invesp, 44% of companies have a greater focus on customer acquisition versus the 18% that focus on retention. Sport organizations therefore

should behave differently than companies from other industries. Because if almost anyone can be a sport fan, then sports organizations have already an almost infinite database of “pre-existing customers”. Data analytics should be utilized to segment different groups and differentiate among the different loyalty levels, to have a clear focus.

According to Invesp, the probability of selling to an existing customer is between 60% and 70%, while the probability of selling to a new prospect is between 5% and 20%. If you have a high probability of selling to a certain customer, then all your business efforts should be directed to making the sell happen. Sports organizations should be fully aware that a sport fan is a committed consumer who already believes in their value. In Performance Communication survey, 57% of the respondents said that sport defines them, in contrast to 30% who said that religion defines them. Hence, the majority believes in sport more than religion. And knowing that less than 2% of people would switch religion (Performace Communications and Canvas8 2016), then this indicates that a sport fan is most likely a long-term loyal fan. This is further validated in Gensler’s sports fans’ relationships with their favorite teams’ study. Survey results demonstrated that 88% of the respondents said that they would not consider seeking out a replacement team. And in another Gensler survey on the emotional power of brands, 51% of the respondents said they would feel devastated if their favorite brand went away or no longer existed (Gensler 2013). The use of this strong word “devastated” along with the previous numbers, confirm that the sports fan has a unique characteristic, that is, strong emotional connection and attachment. These characteristics make them worth the investment, worth investigating and answering their needs. According to the Performance Communication survey, 85% say it is important for sports to grow fan bases and 90% say they feel positive about diversifying fanbases. Meaning that sports consumers want brands to recognize them and communicate with them.

3. Comparison to other industries

In genres like drama, around 30% of content is now time-shifted, while with sports, it's less than 7% (Performace Communications and Canvas8 2016). This is one of the key differences between the sports consumer and other types of consumers. The fans adapt their schedules according to sporting events.

According to Gensler survey on the emotional power of brands, consumers' favorite brands vary among age and industry. For instance, people aged between 18 and 34 have the highest percentage of favorite brands in the clothing/shoes/accessories industry (Appendix 8). This indicates that self-image is highly important among young people. Sports fans in that age interval have therefore specific characteristics that should be taken into consideration by sponsoring brands. Young people, for example, express themselves through what they wear, and that is why the same age category expressed the highest willingness to wear their favorite brands' categories.

Young people are into image, and social media allows them to share their worldviews and values. In turn, this favors their purchase intentions for their team's products. They know they can share their purchases using several communication channels.

Interestingly, in Rival IQ's industry report (Feehan 2021), sport teams have the second highest engagement rate (0.18%) right after influencers (0.19%) acknowledging that among influencers we find many athletes (Appendix 9). With regards to Instagram engagement, sports teams also have the second highest engagement rate (1.79%), following higher education which has a 3.19% engagement rate (Appendix 10). These statistics show the level of involvement and engagement that sports consumers have compared to other consumers. And brands must acknowledge these unique differences when performing marketing and sponsorship activities.

4. Need to engage

According to the survey conducted by Performance Communications, 73% of the respondents say that it is important for them to access sporting content whenever they want. 52% have already accessed sporting content at work, 44% commuting, 14% at weddings and funerals, and 25% in the bathroom. Not only do fans have the need to access content at any time, but they also have the need to access more content while watching them. Four out of five have accessed sport content on their smartphone while watching the TV. They need to look at notifications, highlights, or something that they might have missed. This indicated a growing demand for content, which the sports organizations can in turn deliver.

Performance Communications results also validate the trends previously identified in the literature review. Fans need off-season content, with 29% saying they want in-depth season analysis, and the rest interested in other types of content such as athletes' lives beyond sports and historical sporting moments (Appendix 11). Fans have gone beyond season engagement, to off-season engagement, not leaving any detail behind. Additionally, with regard to broadcasting innovations trend: two out of five think VR headsets would improve their viewing experience, and 50% say interactive slow-motion replays would improve the fan experience. These numbers suggest that sports fans are so invested that they seek better experiences. Brands should recognize the levels of satisfaction of sports consumers to efficiently answer their needs, and by doing that, they can enhance their engagement and their loyalty.

And since the sports fan is aware of their own importance, they believe they are entitled to make choices that can improve their experience. For instance, three out of five want to have the ability to choose different camera angles, and 55% think the ability to choose commentary would improve their viewing.

Fans believe that they are an important pillar in sports, thus, they demand to be involved in the decisions made around broadcasting. When they were asked “what does being a fan mean?”, for 75% it is cheering, and 72% said supporting the team no matter what (Appendix 12). This justifies why 85% of respondents believe that sports would be nothing without the fans. They know the impact they make, and they expect their desires to be met. And from all the previous statistics, we can conclude that the sports fan’s most special characteristic is that they seek engagement.

3.2 Qualitative Research

3.2.1 Qualitative Research design

The qualitative research technique that was applied is semi-structured in-depth interviews. The purpose of these interviews to get reliable industry experts’ insights on the research topic. Having already gathered quantitative data that is more focused on the fan behavior and the sport consumers’ perspective to the use of data analytics, interviews help: understand the perception of sports organizations, including clubs, brands, and data companies. The participants were also encouraged to give their personal opinions and to give examples from their own marketing activities.

The questionnaire was comprised of seven questions. The first part of the questionnaire aims at understanding the importance of data analytics, and the importance of fan loyalty as a determinant for using analytical tools. The second part is focused on the trends, and it aims at learning about how these trends drive engagement and enhance fan loyalty. The last question is why sponsorships can fail? The rationale behind this question is to try to understand the role of data analytics and fan loyalty on the success of sponsorships. The Interview guide can be found in appendix 13.

3.2.2 Participants and Procedure

Six Interviews were conducted with participants with different profiles from the industry. Four of the participants represent football clubs, one represents a brand, and one is representing Sports Alliance who works with both brands and clubs. The diversity in profiles should give a more holistic overview. First contact with the participants was done either through LinkedIn or email. Most of the participants are clients of Sports Alliance, especially the football clubs. Regarding the gender, five of the interviewees are male (83%) and one is female (17%). A detailed description of the participants can be found in the appendix 14. All interviews were conducted between the 10th of November and the 10th of December, and they lasted around one hour. Language used was English except for one interview which was conducted in French and was translated. All interviews were recorded, and afterwards transcribed. The relevant parts of the interviews were classified per topic and can be found in the appendix 15. Full interviews can be provided upon request from the first author.

3.2.3 Qualitative research results and analysis

Interviews generated interesting insights on three aspects mainly: the importance of data analytics, fan loyalty in sports, and the most prevalent trends that we see in sponsorship today.

- The importance of using data analytics

All the participants agree that data driven strategies are highly important in sport sponsorship. When they were asked, how much they think sponsorship is important on a scale of 1 to 10, most of them gave ten out of ten for the importance of data analytics. No participant gave a number lower than eight out of ten.

Interviewees also agree on what makes data driven strategies important. Data helps take future decisions. It helps keep track of how the brand is growing. For brands who sponsor more than one

brand for instance, it is important to understand what brings the most return, and which one is worth keep investing.

One of the interesting insights provided by more than one football club is that the rise of clubs as media companies, calls for more data analytics. Clubs such as Flamengo, became a media company. Advertising on Flamengo brings a five times higher value to sponsors than other TV channels.

All in all, all interviewees when speaking of the importance of data analytics mentioned: ROI, fan experience, and fan engagement.

The reason behind which not all participants assigned a ten to the importance of data analytics in sponsorship, is that according to some participants, analytical tools have some limitations.

Even though data analytics is important, it requires effort. Some clubs are still in the process of becoming companies, as one of the participants put it. These clubs are still not ready for this steppingstone; that is data analytics. Even if they outsource sponsorship analytics, they will still need internal resources to manage the whole equation. In addition, these clubs might not have the budget for it. This is what one of the participants who is from Sporting Clube explained. According to him, before deciding to implement data analytics, you should use a tool such as the effort-impact matrix, that would help you know how to prioritize investment. Some participants also mentioned that clubs might not have the right management to incorporate data driven strategies. There is generational gap that can be an obstacle. To quote an interviewee from Flamengo “It is not easy to convince a 65 or 70-year-old club president to use data driven strategies in marketing”. Similarly with supporters who are old, it can be hard to persuade them to use technological innovations, such as club apps.

On the other hand, data is risky. First, there is always a risk that the data collected is not accurate. For instance, there is a gap between what survey respondents say they do and what they do. Second, data can be interpreted inaccurately which would impact negatively the decision making.

- Fan loyalty

Most of the participants mentioned the different levels of fans. They did not use the same words to describe the systems they use to categorize their fans, but they are all aware that fans are not all the same. Moreover, all participants agree that the sports fan has an organic affiliation and loyalty to the club, and that this loyalty should be cultivated. To do that, you need analytical tools, first to understand their level of loyalty, and second, to target them with communication specific to their profile. After identifying the level of engagement of the supporter, data will play a major role in answering questions such as: Do we want to try and sell them memberships? Do we want to get them to buy season tickets?

Marketing communication should be completely different with the less engaged fans, who are mostly into the social aspect of sport. In this case, step by step tactics should be applied to engage with this group. For instance, Wolverhampton football club shared a documentary on social media about the players. This content aims to get the less engaged group move up loyalty ladder by making them look at the club differently after being immersed in the players' life.

With regards to factors affecting fan loyalty, the most mentioned ones are tenure and bonding. In fact, some participants believe that they are intrinsically linked and go together. A big percentage of loyalty to a team was whether inherited from family or developed with the aim to become affiliated to exclusive groups around growing up. Cultural connection and the need for belonging is printed in our DNA as humans.

Fan engagement is also considered one of the main factors that affect fan loyalty. At the same time, fan engagement is the best weapon for sports organizations to cultivate fan loyalty. Sports fans seek engagement, and according to the interview participants, fans seek engagement with athletes the most. They want to see every aspect of their lives because they consider them as their heroes.

The least important factor is value alignment. Although consumers normally care about how much the brands' beliefs match their own, with sports specifically this does not apply, especially when it comes to younger generations. Sports are emotional, and fans focus so much on winning that they might disregard values or be blind to them.

- Trends

All participants are familiar or are already using the trends identified in literature. Year-round fan engagement is an ongoing trend. Similarly, broadcasting innovations offer tremendous opportunities for the sponsorship market. Nevertheless, the rise of athletes as influencers is the trend that is altering the clubs' priorities. Clubs are aware now that athletes are the biggest asset they have. They drive engagement, improve brand awareness, and give access to global markets. Bringing a Columbian player to a Spanish team is bringing a whole new community of supporters to that team. An example is when Jimenez joined Real Madrid, the day following the announcement, his jersey was sold out. Fans identify themselves with individual players more than teams. Communication strategies that focused on bringing the fans closer to the athletes, had a tremendous influence on the overall marketing success of the clubs interviewed in this research, in particular Sporting Clube. They undertook different initiatives. First, they launched "inside sporting" (a documentary displaying detailed trainings), which generated massive engagement. Later, they released "Backstage" (content showing the players 24 hours after the

game) which was also successful mainly because fans were able to see the athletes in different environments, resulting in a closer look of their human side.

Additionally, two out of the six participants believe that trends such as fan tokens and Non-Fungible Tokens (NFTs) in general will bring higher engagement in the future.

4. Discussion and conclusion

From the data collected from both quantitative and qualitative methods, it can be concluded that data driven strategies are primordial elements of today's sponsorship. They represent a powerful tool for sports organizations to make better decisions, and consequently make higher returns. Additionally, results, mainly from quantitative data showed that the sports consumer is a distinct consumer compared to other industries. The main differentiator is the human and emotional aspects of sports. This emotionality can be perceived in all aspects of the behavior of the sports fan, including their purchase behavior, how they engage with their team and how much effort and time they invest. The sports fan seeks to engage with the team and athletes, always looking for ways to improve their experiences as fans and to gain proximity to the team. They want the relationship with the team to be bilateral and to feel included. They want to choose the announcer, the music displayed in stadiums, as well as the design of the athletes' jerseys. The sports fan is powerful as they have the market power allowing them to drive trends. Because sports fans want to know everything about athletes, athletes rose as influencers, and because fans need to engage with the team during off-season, the trend of year-round engagement emerged. And because fans want to enhance their viewing experience, today, numerous broadcasting innovations are revolutionizing the fan experience. This unique and organic loyalty of the sports fan is the real asset sports organizations have. Their job is easier compared to other companies because they do not need to dedicate acquisition effort. The sports fan is already acquired and loyal to some extent.

However, this loyalty needs to be cultivated, essentially through answering the fans' needs previously stated. Therefore, companies should not confuse sports fans with the regular consumers. The answer to whether invest in data analytics or not should take into consideration the special characteristics of sport fans, because these characteristics are what makes data a game changer for sport organizations. Loyalty should be the major determinant for using data analytics in sport sponsorship.

5. Limitations

Gensler surveys were conducted in 2013. However, their aim was to investigate concepts such as the emotional power of brands and the relationship between fans and their teams. These concepts might not change much over time. Yet, since the purpose of this research is to understand the sports fan behavior, these reports might have time relevance limitations.

Although secondary data is more accurate because the surveys have less sampling limitations, the choice of companies conducting the surveys over other companies, might be biased. Focus was on topic relevance more than quality of the data.

The surveys analysis (mainly Deloitte's) included thousands of league-level responses across five multi-team leagues: the NFL, MLB, NBA, NHL, and MLS. This gives a broad point of view. However, results might have geographical bias as three of the surveys represent respondents from the US (Both Gensler surveys and Deloitte survey), and one survey focusing on the UK population.

The clubs and the companies interviewed allowed the acquisition of insights from a European Perspective, yet six interviews is a limited number, and data from interviews is not statistically representative. Additionally, the clubs interviewed are all football clubs, and data could differ

across different sport disciplines. There is also a gender bias since 90% of the interviewees are male.

Furthermore, to address the topic of sport sponsorship in data analytics, different viewpoints from both brands and teams should be evaluated. However, only one brand was interviewed leading to a lack of brand perspective, which makes it less possible to see the contrast between the brands and clubs' perception to fan loyalty.

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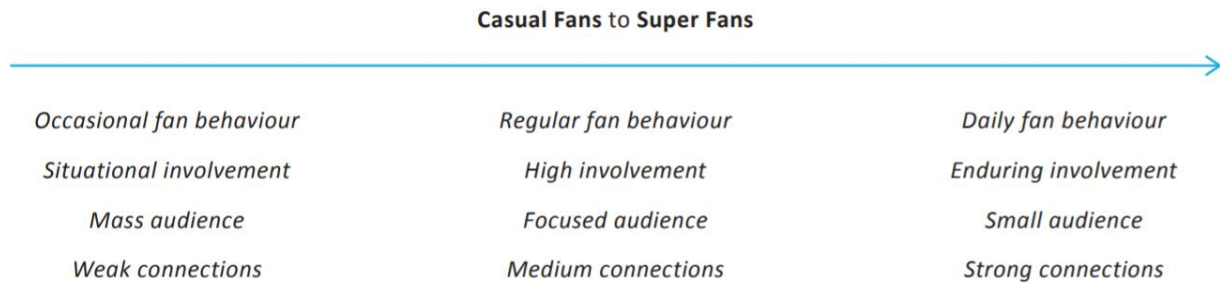
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Appendices

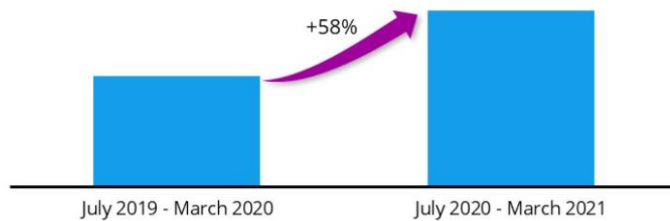
Appendix 1: The fan intensity spectrum (Performace Communications and Canvas8 2016)



Appendix 2: Athletes' branded content growth (Nielsen Sports 2021)

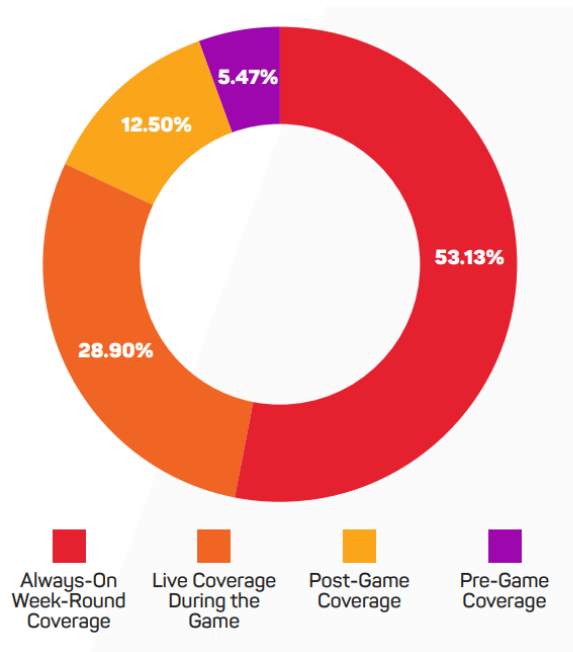
ATHLETE BRANDED CONTENT GROWTH

Athlete-Owned Instagram Posts



Source: Nielsen Sports Social Analysis (15,000 elite global athletes)

Appendix 3: Emergence of always-on (Stats Perform 2021)

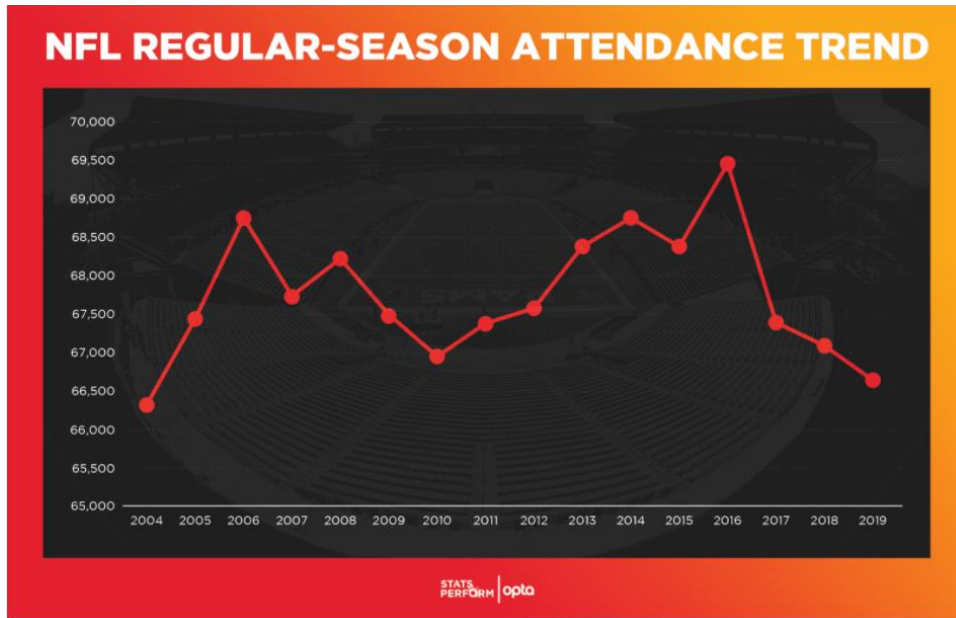


Appendix 4: Content consumption and correlated spend (Deloitte 2020)

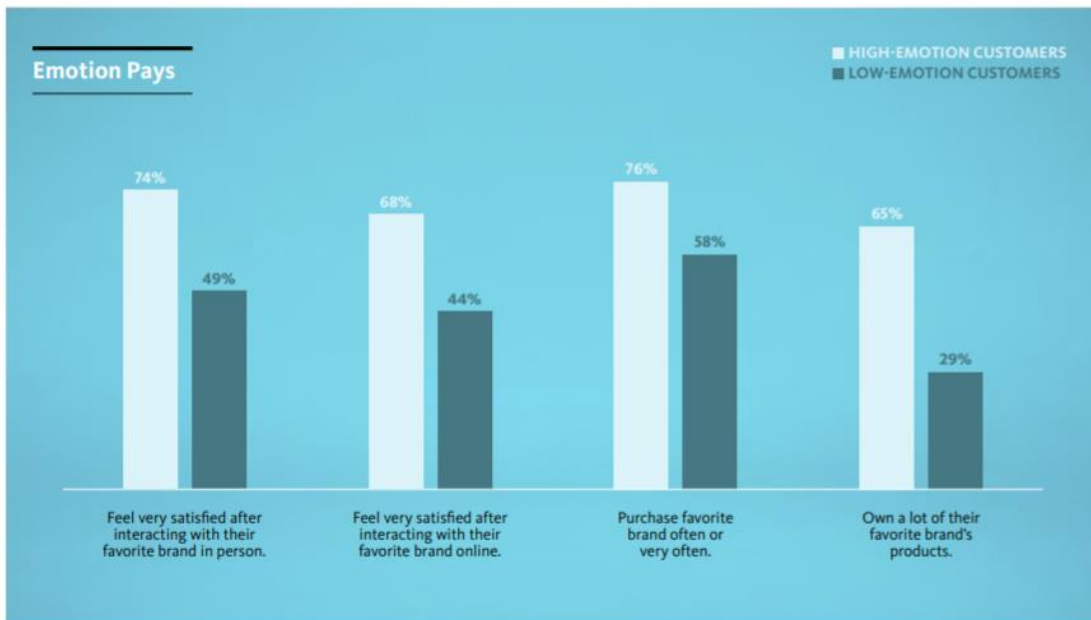
Figure 3. Content consumption and correlated spend



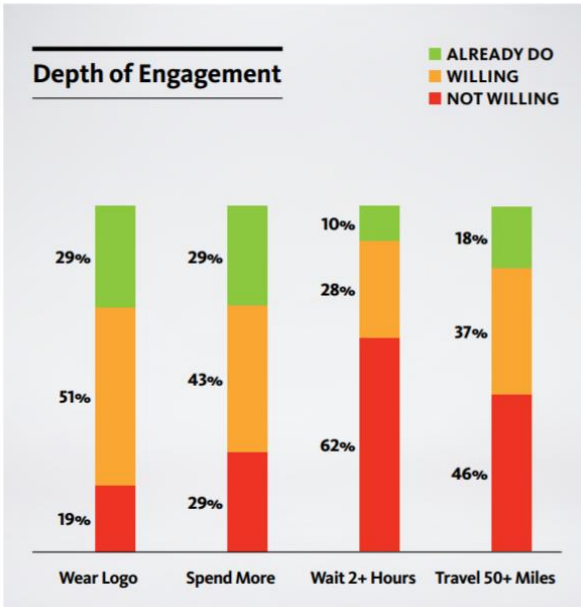
Appendix 5: The shift to digital (Stats Perform 2021)



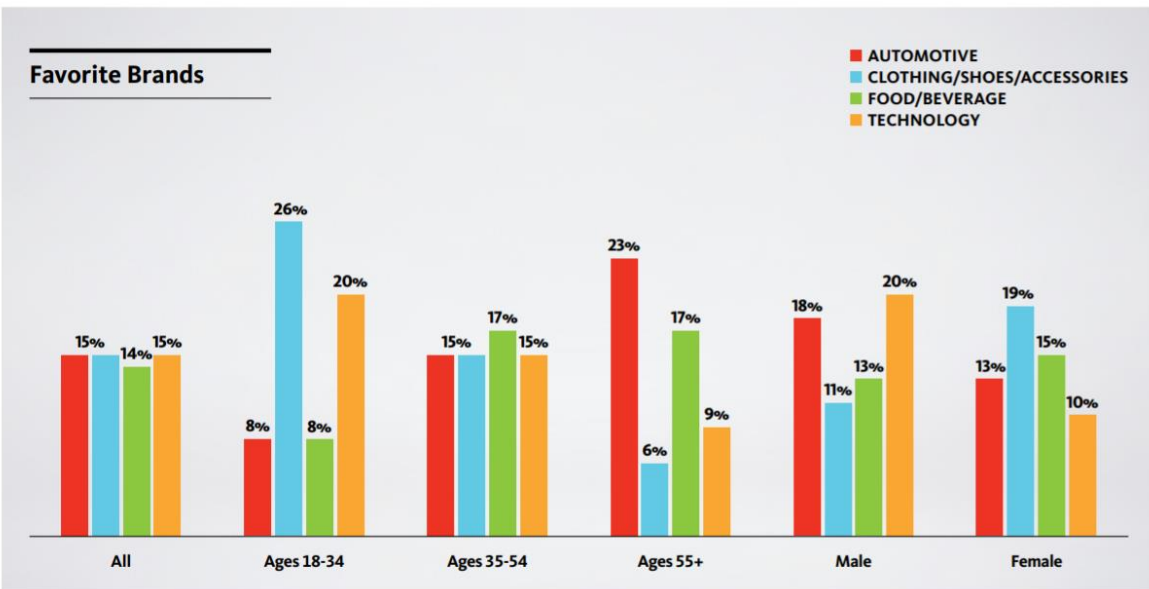
Appendix 6: Return on Engagement (Gensler 2013)



Appendix 7: Depth of Engagement with the consumers' favorite brands (Gensler 2013)

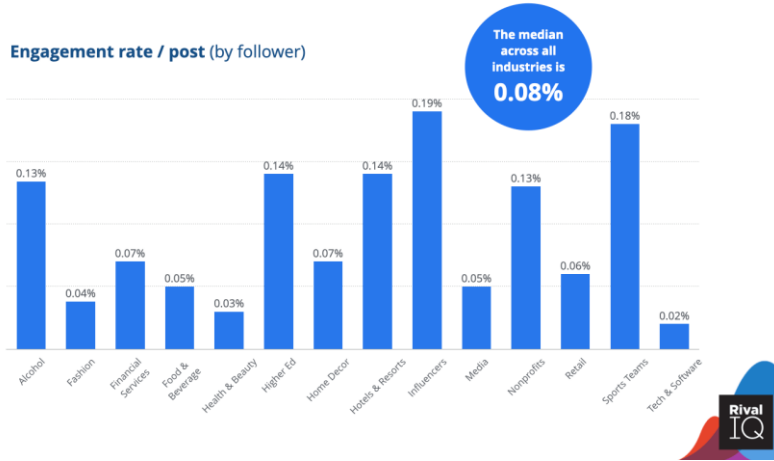


Appendix 8: Favorite brands across industries (Gensler 2013)



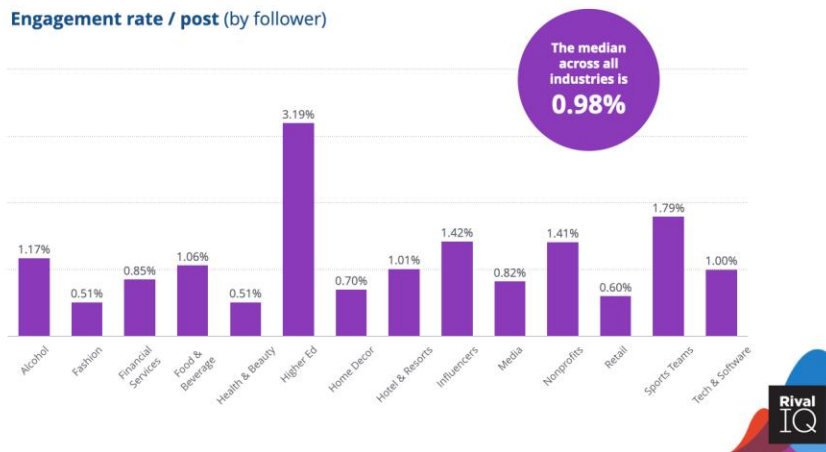
Appendix 9: All-industry Facebook Benchmark (Feehan 2021)

f Facebook engagement

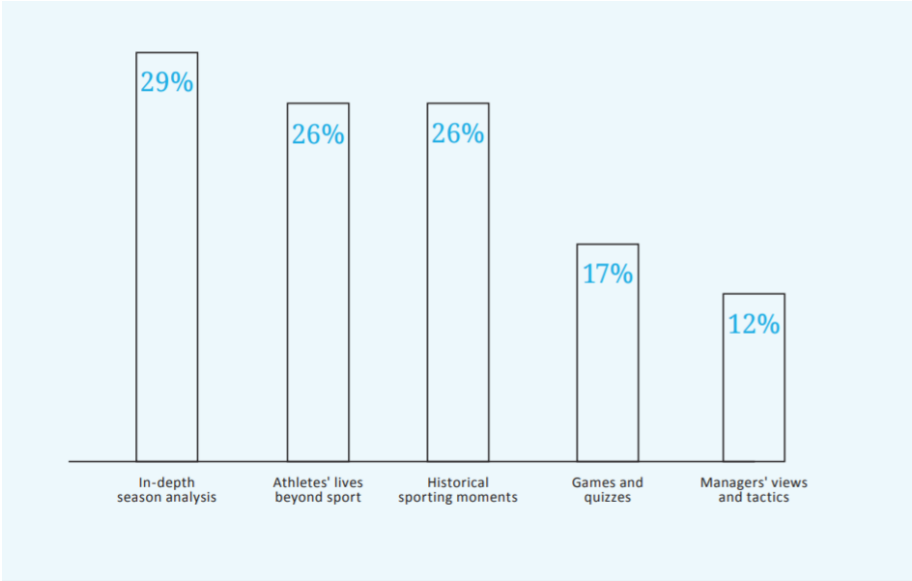


Appendix 10: All-industry Instagram Benchmark (Feehan 2021)

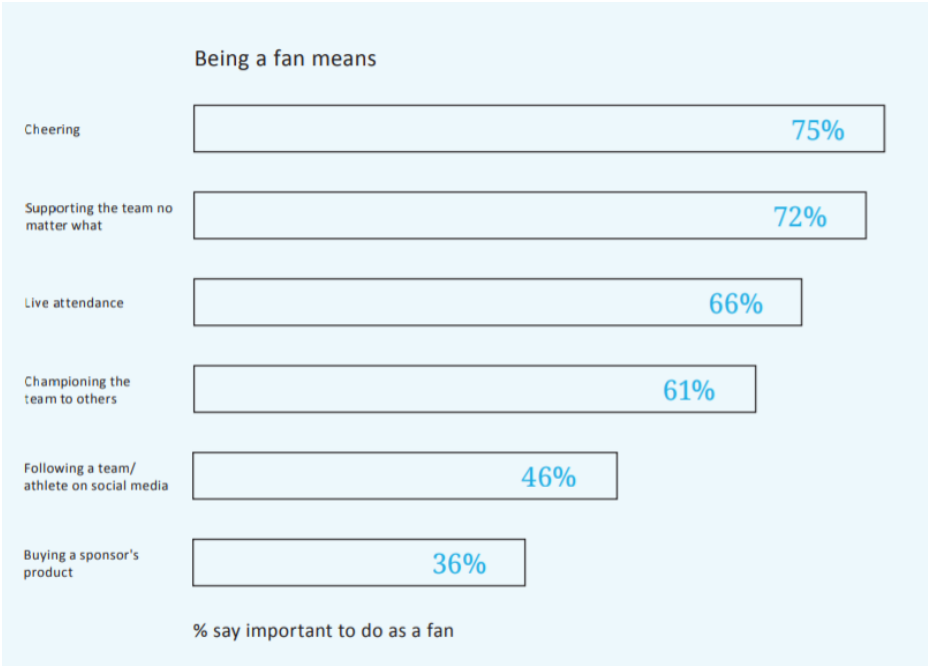
Instagram engagement



Appendix 11: What fans want to see out-of season (Performace Communications and Canvas8 2016)



Appendix 12: Fans' perception to fanship (Performace Communications and Canvas8 2016)



Appendix 13: Interview Guide

1. What makes sponsorship analytics important for sports organizations?
2. On a scale of 1-10, how important do you believe it is for the collective sponsorship community to use data driven strategies?
3. To which extent do you think fan loyalty to the team should affect the decision to use data analytics?
4. What factors do you think affect fan loyalty?
 - Values Alignment
 - Bonding (with friends or family)
 - Ability to engage with the team on social media
 - Tenure as a fan (the number of years spent being a fan of the team)
 - Feeling valued by the brand and receiving communication
5. How do you cultivate fan loyalty?
6. In my work project, I identified 3 main trends in sport sponsorship: The rise of athletes as influencers, year-round fan engagement, innovation in broadcasting (use of AR, VR, drones, Announcer choice and the subscription model)

Which of these are you most familiar with/ using?

Do you think this trend influence your overall marketing success?
7. Why do you think sponsorship fail?

Appendix 14: List of participants

Participants:

Léa Forget (Head of communication and digital marketing Art Explora)

Caetano Marcelino (Sports Rights and International Affairs Manager na Clube de Regatas do Flamengo)

James Gibbins PG Dip IDM (Supporter Insight and Loyalty Manager at Wolverhampton)

Bas Schreurs (Database Marketeer at Feyenoord Rotterdam)

Andre Bernardo (Chief Strategy and Operations Officer at Sporting Clube)

Nuno Mena (Territory Manager & Business Development - Portugal, Spain & LATAM)

Appendix 15: Relevant Interview parts

1. On the importance of sponsorship analytics for sports organizations

- Agreement of participants on the importance of data driven strategies

Caetano Marcelino (Flamengo): We went from 500 million in income to 1 Billion this year, this is thanks to the strategy, it's also that our marketing grew at least 30% every year. We had a deal with amazon, and we were about to close it with 10million for one year, and mercado uvi came to us with 30Million for one year and a half after knowing about the previous deal. With the the right strategy, and if your strategy really depends on data analytics, then it would bring value to the table, the political side also plays a big role. Having a vice president for example who understands the importance of data analytics, then the only limit would be the budget. If you have the budget, then yes data analytics should be the priority.

James Gibbins (Wolverhampton): Playing for the league made us need a good structure to support us, that's how digital came onboard, and we implemented the Wolves app, for more personalized content. The main challenge after having a data base is how to engage with the supporters. Data

tools help us go global and get more fans in the database. And therefore, sell to larger markets. And diversifying markets means diversifying risks, which helps find different ways for generating revenues.

Léa Forget (Art Explora): I believe that sponsorship is an integral part of today's sports scene. So, from a certain sense, analytics and data manipulation is primordial to streamline effective sponsorship. It's like a two-way advantage, where the sponsors get reliable, organized data; and the sports team or organization can become more attractive to sponsors and obtain more funds. Also, these funds, will be beneficial for the organization to grow and to obtain more valuable and positive data with time.

Nuno Mena (Sports Alliance): The traditional sponsorship model based on random visibility and audience is dead for a while. First the audience disperses the attention in several points of a sporting event and don't recognize or remember the brands they see. Secondly, brands want to understand the cost by conversion (visibility, leads or sales) that an activation or sponsorship generates and that's impossible without controlling data, the selected audience, the activation / communication channels, and the conversion points. Look the movements that are happening in the market – companies becoming data owners through the clubs / sports organizations (socios.com)

- **The limitation of data analytics**

James Gibbins (Wolverhampton): We have a new marketing director, that come from team mobile, which understands the why behind what we do, and that's one of the reasons we were able to grow our social networks in the past few years, from 132 million to 148million without counting the Chinese members. It is important in the future to educate our supporters, the traditional

supporters, the UK fanbase demographics shows that it's mature, a bit older, which makes them a traditional supporter, which makes it hard to implement certain technological innovations

Andre Bernardo Sporting: There is an effort impact matrix, that helps you to prioritize investment.

Data analytics is important, but it will take a lot of effort especially from clubs that are still in the process of becoming organization and acting like companies and can't have now a big data analytics department. Even if they work with a third party, they would have to have internal resources to manage the whole equation, and sometimes football clubs, not only because they are in a transformation process, which makes these implementations hard to do, but also there is no guarantee that there is available funds to do it.

From 1 to 10 it is an 8. I don't think anyone would give you less than 8 as an answer.

Also, everybody lies like the book says. There is a gap between what people do and what they say they do. The book talks about how the behavior of the respondents comes out to be different than what they say they do in the survey.

Also, data can be wrongly interpreted, and wrong decisions can be taken. You can have the best data machine for example, and then make a club app but not communicate properly with the fans. There is no point of having data analytics, and then failing at a basic level, which is communication with fans.

2. On fan loyalty and how they cultivate it

- Not all fans are the same

Bas Schreurs (Feynoord): We had a meeting about differentiating the fan in our database, understand their level of loyalty, put them in different groups, different profiles. There are those who are very engaged who attend almost every game, and think about it every day, but there are also the less engaged fans, who are more into watching their national team for example, because of their social aspect. It is harder to find the less engaged group and target them. They need to be targeted differently, basically they need to be contacted step by step, for example inviting them to the stadium for the first time.

James Gibbins (Wolverhampton): The way we analyze our supporters is through loyalty ladder, the lowest level has the largest set of supporters, people who have a general awareness of the club. To move people up the loyalty ladder we employ growth and monetization strategies. We try to engage this group on social media, like sharing a documentary about one of the players, if you don't have an affiliation with club, watching that might make think differently about the club, follow it a bit more and engage. We also need to pay attention to language. We are global, and to engage with our supporters, it is to use their native languages. Language gives more engagement opportunities. Once they are on the database, it becomes different, it is the onboarding journey.

Data helps identify the different tactics with newly database joined supporters, in order to start moving them up the loyalty ladder. Do we want to try and sell them memberships? Do we want to get them to buy season tickets?

Léa Forget (Art Explora): I think brands need to offer meaningful stories and experiences that are aligned with their fan's lives. They should focus more on aligning their sponsorship strategies

with their fan-s passions, interests, and hobbies. There might be no other industry, where customers are so loyal and so keen on having contact with the brand, or the club in this case.

- **On how to cultivate fan loyalty**

Caetano Marcelino (Flamengo): There is still a long way to go, knowing more our fans, connecting with the brands, knowing more about consumer habits, mainly mobile, membership, stadium fan experience and e-commerce.

James Gibbins (Wolverhampton): We implemented a ticket cashflow system, a loyalty mechanic, allowing supporters to earn 10% cash back on retail and ticket purchases, to bring as many supporters as possible during championships for the business as possible

People who are on the waiting list require different engagement; it might take years before they get a seat.

Bas Schreus (Feyenoord): We see fan loyalty in the contact moments, for example in the email benchmark research, that for us the emails that we send out, the opening click percentage are way higher than the average in leisure industry or maybe all the other branches together. Because fans seek communication from us. Also, loyalty shows compared to other branches, in stadium visits, the amount spent, families dedicating part of their income on final products, also in the engagement on social media.

Nuno Mena (Sports Alliance) Fan loyalty is an emotional bond and characteristic that no other industry as sports has in such a strong way and lifelong way. Treating right your fans or your consumer can generate relations for life and that generates more revenue.

- **Factors affecting fan loyalty**

Léa Forget (Art Explora): I think that the most important factors for fan loyalty is a combination of bonding with family and friends and the tenure as a fan. Studies showed a big percentage of loyalty to a team was whether inherited from family or developed to be affiliated to exclusive groups around growing up. I think the cultural connection and the need for belonging is printed in our DNA as humans.

Andre Bernardo (Sporting): What definitely impacts the most is tenure, which in some way is related to bonding, because the majority of supporters follow their parents or grandparents. Big part of sports is entertainment, and they do that with friends, and they form group, it's a way of socially engaging with people.

More content being generated

Caetano Marcelino (Flamengo): It is very hard to manage a country of 50 million supporters, when you post anything, you should not look at the comments, the first wave is also in a bad mood. But it's important to analyze how they communicate, the language, the mood, the emojis, etc.

James Gibbins (Wolverhampton): We are global, and to engage with our supporters, it is to use their native languages. Language gives more engagement opportunities. Once they are on the database, it becomes different, it is the onboarding journey.

3. On trends

Nuno Mena (Sports Alliance): Athletes are becoming a relevant part of the game and, in some cases, more powerful than sports organizations. They are becoming more exclusive and the alignment of a brand with what an athlete represents it's fundamental for the commercial success.

At the same time, for clubs and sports organizations, they represent content (on/off pitch, personal), the clubs' values (resilience, excellence, winning, etc) and the dream for younger fans. So, they are an asset. Personalized broadcasting and content consuming is also relevant. You will be able to track who consumes what, when and where, so you'll have data and analytics to keep improving the experience with secondary screens, personalized content and ads enhanced by AR/VR. New features associated to crypto / blockchain / virtual influencers will also be a reality in the short term. But the main point is that the rights holders will also become media houses, managing their own ads and media business, taking that value from 3rd parties.

Caetano Marcelino (Flamengo): We utilize Facebook, Instagram and Tiktok for broadcasting purposes. As a media company the value we give back to sponsors is 5 times bigger than normal TV, and we use this metrics in all of our selling. I have to give content depending to every type of viewer.

James Gibbins (Wolverhampton): Trends changed completely our practices. How we used to do things 3 or 4 years ago, is completely different than how we do them today. Before we used to look into general statistics on social media and the followers of the club, whereas now, we still include those statistics but with a greater focus on individuals of the club. For example, Raúl Jiménez has absolutely massive following, especially in Mexico, and that is how we increased our Mexican fanbase on social media, which attracts brands from Latin America. Athletes allow us access to different markets. We also have Hwang Hee Chan, and because he made a great start this season, playing in the premier league a lot more people are starting to look at him on social media, which gives us an opportunity to grow in south Korea. And we are taking this into consideration

in our sponsorship practices because that gives us a strong proposition for brands from the Asian market.

Andre Bernardo (Sporting): I believe being able to engage with athletes is the most valuable factor. At the end people want to know what players are doing, they want to enter the world that they do not see, like how athletes are training. For example in Sporting, we launched recently some content called “inside sporting” which is about trainings which was very successful in terms of fan engagement, we launched another content “backstage” for the backstage of the game, 24hours after the game, also the podcast we launched was a very successful, because you see a more intimate side of the players, because we interviewed the players in a different environment, so you see a more human part of the player, that what people are eager to see, because they consider athletes their heroes, so they want to see the invisible part about them, to be close to them.

4. Why sponsorship fail

Caetano Marcelino (Flamengo): This is like the egg and chicken what goes first? Should we invest in data to try to get results? Or take some risks, try to make results, and then get the money to invest? It is also important to make sure you are investing good data, that would give enough quantitative information, because with a bad quality data you would drown. Whether it is about a B2B or B2C relationship, or B2B2C, you need to control the triangle between data, content and personalization, if you do that you can definitely be successful, because that is the best leverage you can have against competition.

Nuno Mena (Sports Alliance): Especially because the lack of alignment on the goals between a brand and a rights older. If by one hand clubs/sports organizations “want” the money and in exchange will give visibility, the “investor” wants awareness (of course) but also wants, leads,

reaching the right audience, measuring their investment and results and also new and innovative ways to deliver that content. No one better than clubs / sports organizations to do it.