



# MLS Marketing Partnerships Report 2023



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## About SponsorUnited

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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 330,000 brands, 1.6 million deals, and 11.4 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.



We made the list again.  
**Inc. 5000**

## Introduction

Without a doubt, 2023 has been a year for the books for Major League Soccer, a league whose arguably unrivaled momentum has grown exponentially since its 1996 founding. The sky's-the-limit tone of MLS' blockbuster 2023 season was set late last year, with the announcement of Apple's groundbreaking 10-year, \$2.5B global partnership with the league, which kicked off in February and allows fans to stream every MLS match through the AppleTV app.

While the deal underscored MLS' burgeoning clout in the pro sports landscape, Inter Miami's signing of Argentine superstar and eight-time Ballon d'Or winner Lionel Messi in July—arguably the biggest coup in professional soccer in recent memory—was a literal game-changer for the league. Besides the immediate impact of the “Messi Effect”—his debut drew the largest single channel audience for a soccer match on linear television since 2004, while Inter Miami's social media following exploded nearly 800% to 26M—his arrival elevated the league to new heights overnight, cementing its position as arguably the pro sports league to watch worldwide, whose future potential—given its global audience of 5B fans, and counting—seems literally boundless.

Attendance and average team valuation—up 27% and 85% since 2019, respectively—set new records this season. But it's the unparalleled consumer demographics of the league's ever-expanding audience that has brands across an array of industries piling on at a breakneck pace. With an average age of 37.4, MLS boasts the youngest, most diverse fan base in North American sports—67% of which are Gen Zers and Millennials, 77% are digitally native, and 31% are Hispanic. MLS counted 33 league-level sponsors in 2023, including 10 that came aboard in the past year. In February, adidas, the league's most tenured sponsor, extended its partnership through 2030—making it the apparel company's longest-ever investment in North American sports.

Currently, brands from 23 categories are active MLS partners, driving team sponsorship revenue up 15% to nearly \$590M in 2023—a number that's sure to climb further in the run-up to North America's hosting of the 2026 FIFA World Cup, which will spotlight pro soccer's dazzling ascent in the US like never before.

As the sport's dynamism continues to surprise and dazzle fans everywhere, we're excited to present our 2023 MLS Marketing Partnerships Report. Jointly authored by SponsorUnited's Marketing, Research & Insights, and Analytics departments, it encompasses more than 800 brands, 2,200 sponsorship deals, and over 23,000 sponsorship assets from February 1st 2023 through November 10th, 2023.

# Key Findings

## Key Findings

- 1** MLS team sponsorship revenue soared to \$587M in its 28th season—a 15% increase YoY—with Financial, Healthcare, and Insurance brands leading the spend across 23 sponsorship categories.
- 2** Lionel Messi wields extraordinary influence: 52% of his brand partnerships are exclusive within MLS, while an incredible 81% of his deals—including Cirque du Soleil, Hard Rock Café, and Louis Vuitton—are unique to him across US major pro sports. His unrivaled ability to attract such wide-ranging brands underscores both his dazzling marketability, and his singular power to elevate MLS' profile and prestige with an ever-growing audience on the global stage.
- 3** Growth in both MLS TV viewership and live audiences fueled a 16% surge in sponsorships: more than 1M fans tuned in to the most-watched games this season, while match attendance climbed 5% to nearly 11M, enticing sponsors. The Financial, Construction & Industrial, and Business Services sectors led the charge, boosting teams' average number of deals to 75 from 65 last year, as more than half the clubs registered double-digit increases.
- 4** Sporting Kansas City continues to dominate all MLS teams in sponsorships for the second consecutive year, followed by 2021 expansion club, Austin FC, and FC Cincinnati. Sporting Kansas City also expanded its margin, boasting 13% more deals than the second-place team.
- 5** Financial category growth outpaced all others in the last year, led by the Investment Services subcategory, which accounted for nearly half of its 32 new deals. In contrast, the NFT and Betting & Daily Fantasy subcategories contracted notably, with decreases of 17 and 8 sponsorship deals, respectively.
- 6** Adidas, Continental, and BodyArmor topped the list of brands with the most venue/activation exposure this season. Adidas' rarefied status as the league-wide apparel and footwear sponsor ensured constant visibility, while Continental—MLS' official tire sponsor—used extensive stadium and broadcast placements to enhance its brand impact. BodyArmor's heightened exposure underscores a burgeoning focus on athlete health and performance, as the sports drink brand capitalized on the league's growing audience.

# Brands



# Houston Dynamo x Shell Energy

The visionary partnership sets a new benchmark for sustainability-focused deals in MLS



## COMMUNITY INITIATIVES

### Trees For the Win



Shell Energy partners with One Tree Planted to donate 350 trees to the community for every Houston Dynamo win. So far, 7,300 trees have been planted as a result of the initiative, part of a large reforestation effort in East Texas.

### Futbolito in the City



This company-powered program offers free weekly soccer coaching for kids ages 6-14. The weekly, 90-minute classes, divided into two five-week sessions, are conducted at local parks, schools, and Houston Dynamo FC mini-pitch locations.

## ENVIRONMENTAL EFFORTS

### Shell Energy Stadium Goes Green



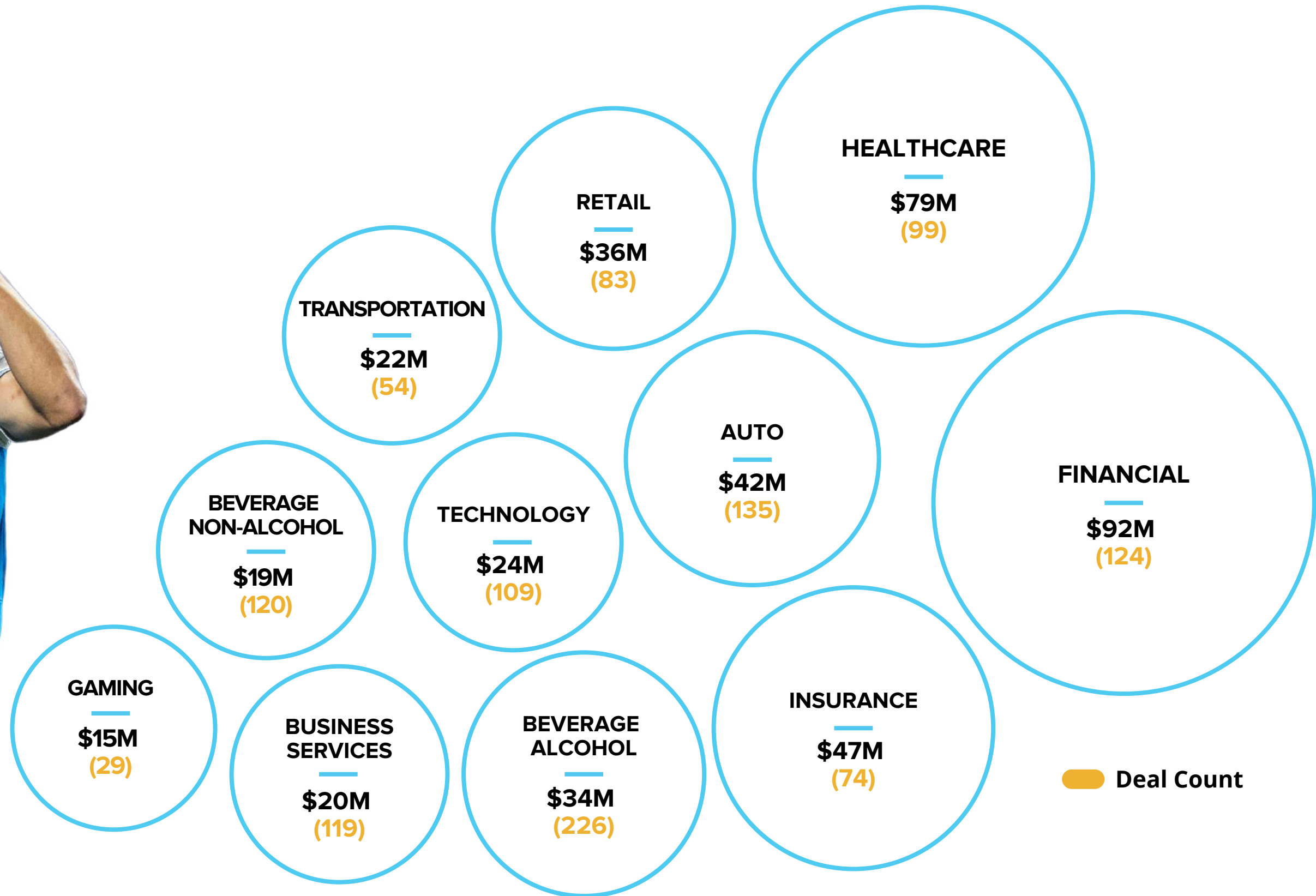
Shell Energy and the Dynamo collaborate on various projects to promote sustainable energy practices at Shell Energy Stadium and reduce its carbon footprint, including:

- New LED lighting throughout, and 350 new solar panels to power the stadium
- Installing electric vehicle (EV) charging stations
- Implementing a new submetering system for enhanced energy savings

Shell Energy's partnership with the Houston Dynamo serves as a model example of an environmental cause asset, which just 65% of MLS teams have adopted so far. With more than 40 distinct media and venue assets—triple the number in an average MLS sponsorship deal with an environmental cause element—the agreement surpasses all other sponsorship deals of its kind in the league.

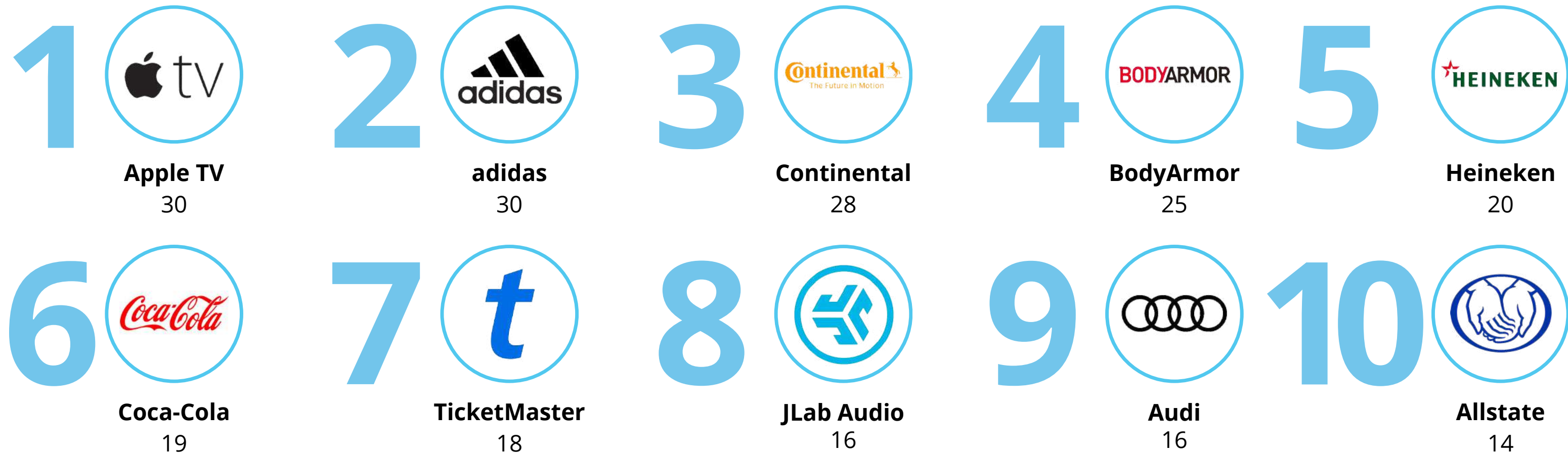
# Team Sponsorship Revenue

MLS team sponsorship revenue rose 15% YoY to \$587M



# Most Active Brands

Ranked by Number of Activations or Signage by Team\*

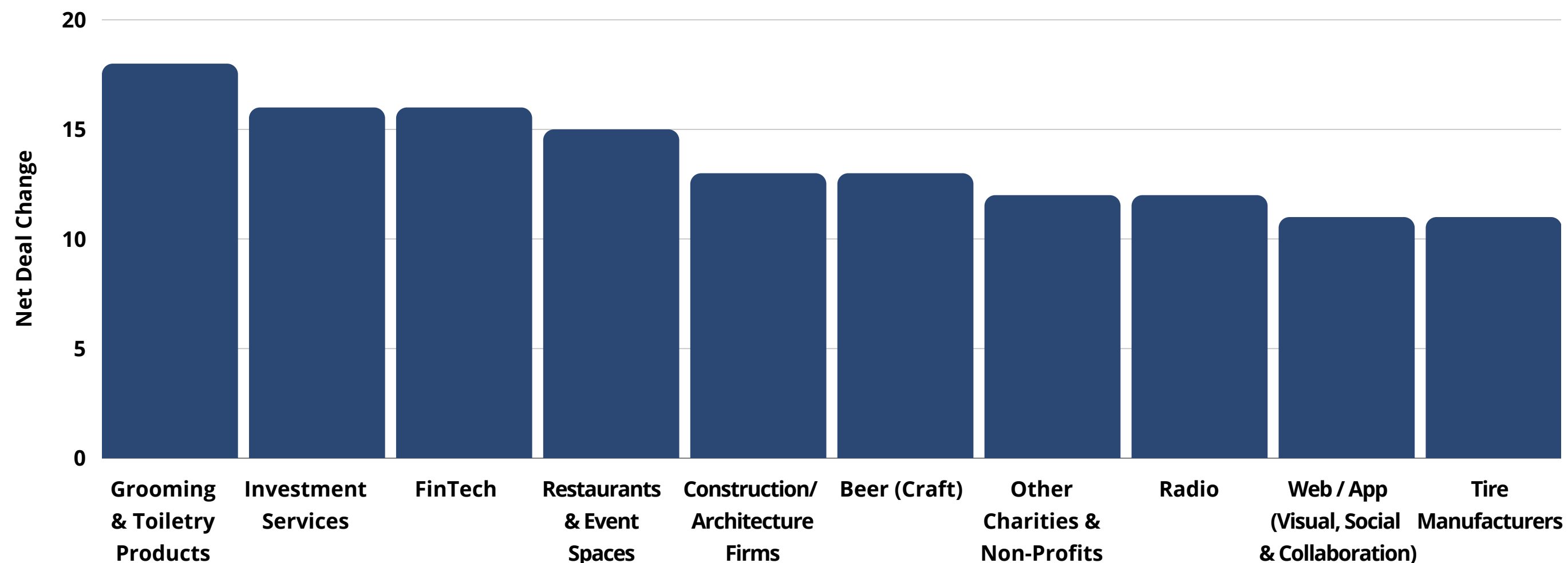


\*Includes league partnership

# MLS' Unrivaled Audience Appeal

The league's enviable fan demographics have brands racing to grab a piece of the action

## YOY NET SUBCATEGORY DEAL GROWTH



The MLS sponsorship landscape is ever-evolving, as brands across a range of industries increasingly vie to tap into the league's young, affluent, and diverse audience demographics. The exponential 533% growth in the Investment Services subcategory was primarily driven by RBC Wealth Management's strategic partnerships with eight properties—including the league itself—while TikTok's six new MLS sponsorships fueled the Web/App subcategory's 275% surge.



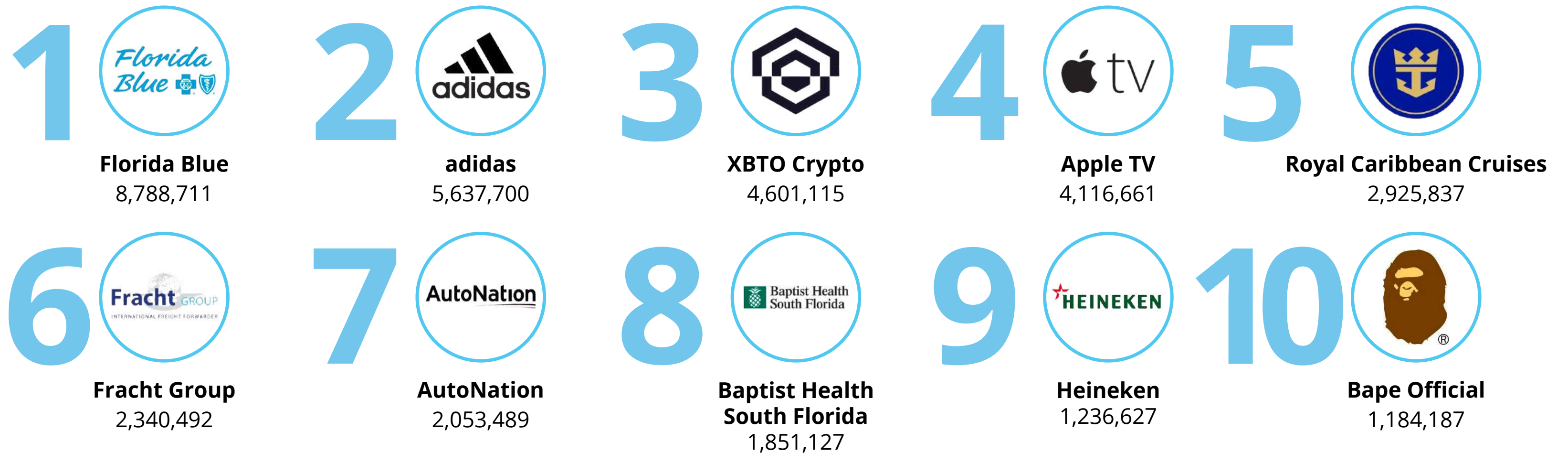
# Sleeve vs Jersey Patch Asset Comparison

Jersey Patch (Introduced 2007)		Jersey Sleeve (Introduced 2020)
<b>33</b>	average # of additional assets included	<b>23</b>
<b>0%</b>	% available for purchase	<b>36%</b>
<b>19</b>	# of categories	<b>16</b>
Hospital   Banking   Insurance-Property & Casualty	most active categories	Hospital   Car Manufacturers (Non-US)   Web/App (Visual, Social & Collaboration)
<b>1,707</b> Per Post	average social engagement on branded post	<b>5,108</b> Per Post
Digital Ads on Field Level Wall   Digital Ad on Videoboard   Media Backdrop Logo / Name   Website Banner Ads   Event Presenting Sponsor	assets most frequently incorporated in the deal	Digital Ads on Field Level Wall   Digital Ad on Videoboard   Website Banner Ads   Event Presenting Sponsor   Ribbon Board Digital Ad



# Most Active Brands on Social Media

Ranked by Total Engagement on Branded Posts



# Properties

## Messi Takes Miami

The Argentine superstar's move to MLS boosts the league's profile and value to unprecedented heights

Lionel Messi's move to MLS in July with Inter Miami CF sent shockwaves through the soccer world, and continues to manifest across an array of aspects—including league fan engagement, viewership, and the Argentinean phenom's sponsorships.

### SPONSOR/BRAND IMPACT

- Given Messi's longtime association with the #10, adidas declared October 10 (10/10) "Lionel Messi Day," to celebrate both its 17-year partnership with the superstar and his decision to join Inter Miami.
- Messi became an ambassador for Israeli startup OrCam Technologies in 2020, to improve accessibility for people who are blind or visually impaired through the company's breakthrough AI technologies. As a facet of the partnership, Messi meets with visually impaired people—who become members of the "OrCam Dream Team"—to gift them the OrCam MyEye, a revolutionary assistive technology solution.
- Hard Rock International—whose 2021 deal with Messi made him the first athlete to become a company brand ambassador—celebrated his move to Inter Miami with the July 2023 launch of the "Messi Chicken Sandwich," inspired by his love of Chicken Milanese, an Argentinean staple. As part of the campaign, Hard Rock International released a TV commercial, "Something New is Cooking," starring Messi that aired worldwide. Fans could scan a QR code to unlock unique 360° digital experiences timed to the launch, including a message from Messi, an AR experience with him and his namesake sandwich, Messi trivia games, and online shopping.

### THE MESSI EFFECT

**Social Media Engagement Soars:** Following Messi's arrival, interactions spiked across MLS' social media accounts:

 **1,125%**
 **517%**
 **2,488%**

**TV Viewership Grows:** Last February, MLS kicked off a 10-year, \$2.5B exclusive media rights deal with AppleTV. Messi's debut match for Inter Miami was the most-watched MLS game in 20 years, surpassing the audience for all other major soccer stars' debuts in the league.

**Attendance Sets New Records:** MLS broke its single-season average attendance record this year, with 22,111 fans per match. Total season attendance also set a new mark in 2023, climbing to more than 10.9M fans.

**Ticket Sales and Prices Skyrocket:** Inter Miami's attendance rose 36% this season over last year, while the average home game ticket price soared 459%, from \$152 to \$850. The price for the team's next seven away matches also increased an incredible 558%.



# Most Active Teams

Ranked by Number of Sponsorship Deals

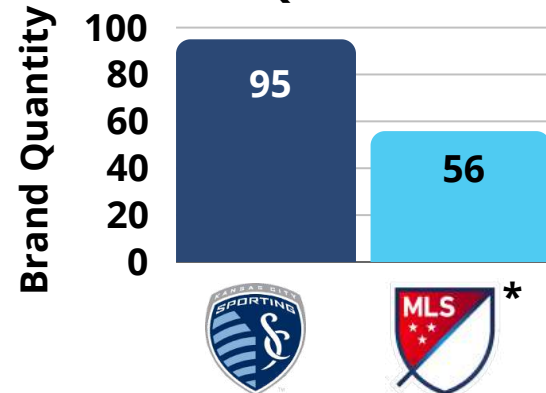


**Sporting Kansas City**

125

Sporting Kansas City leads all MLS teams in both sponsorships and use of digital ad boards in the club's stadium, thanks to a 2019 partnership with Daktronics that was extended last year. The deal, which saw the north videoboard at Children's Mercy Park upgraded with Daktronics' high-resolution 10mm LED technology, allows the club to offer sponsors more in-venue exposure on these cutting-edge screens during games.

**DIGITAL SIGNAGE QUANTITY**



**FIXED SIGNAGE QUANTITY**



\*League Average



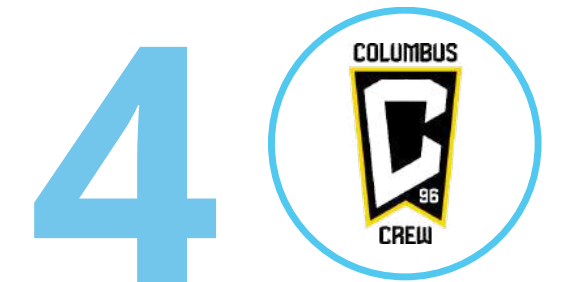
**Austin FC**

111



**FC Cincinnati**

107



**Columbus Crew**

102



**Nashville SC**

93



**FC Dallas**

93



**Philadelphia Union**

91



**Toronto FC**

90



**D.C. United**

87



**Atlanta United FC**

87

# Playing to Win

Two of the top three most endorsed playoff teams could face off in the 2023 MLS Cup final



## FINAL FOUR TEAMS



**107 deals**  
3rd overall  
2nd among  
playoff teams



**102 deals**  
4th overall  
3rd among  
playoff teams

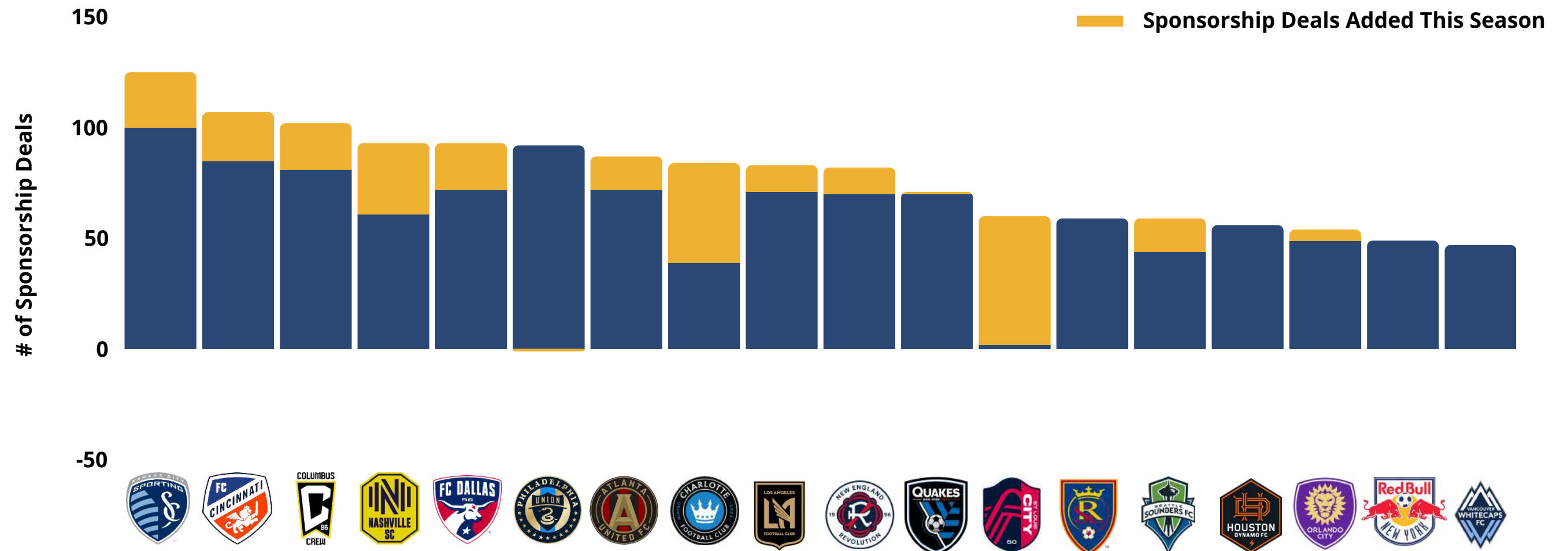


**83 deals**  
T-12th overall  
8th among  
playoff teams



**56 deals**  
23rd overall  
15th among  
playoff teams

## PLAYOFF TEAM RANKINGS BY SPONSORSHIP DEALS

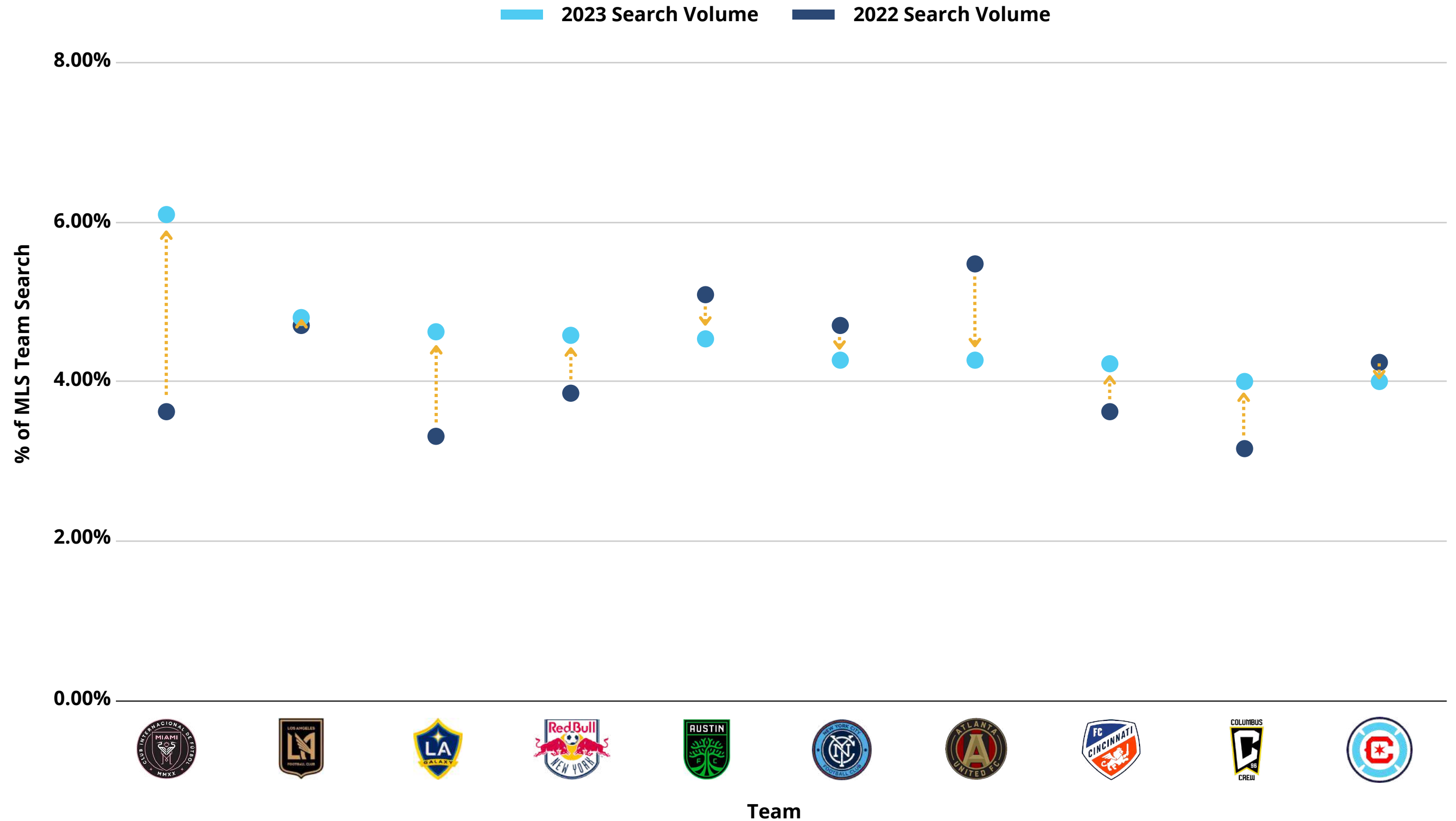


# SU Team Search

The 10 most searched MLS teams on the SponsorUnited platform this year versus 2022



## MOST SEARCHED MLS TEAMS

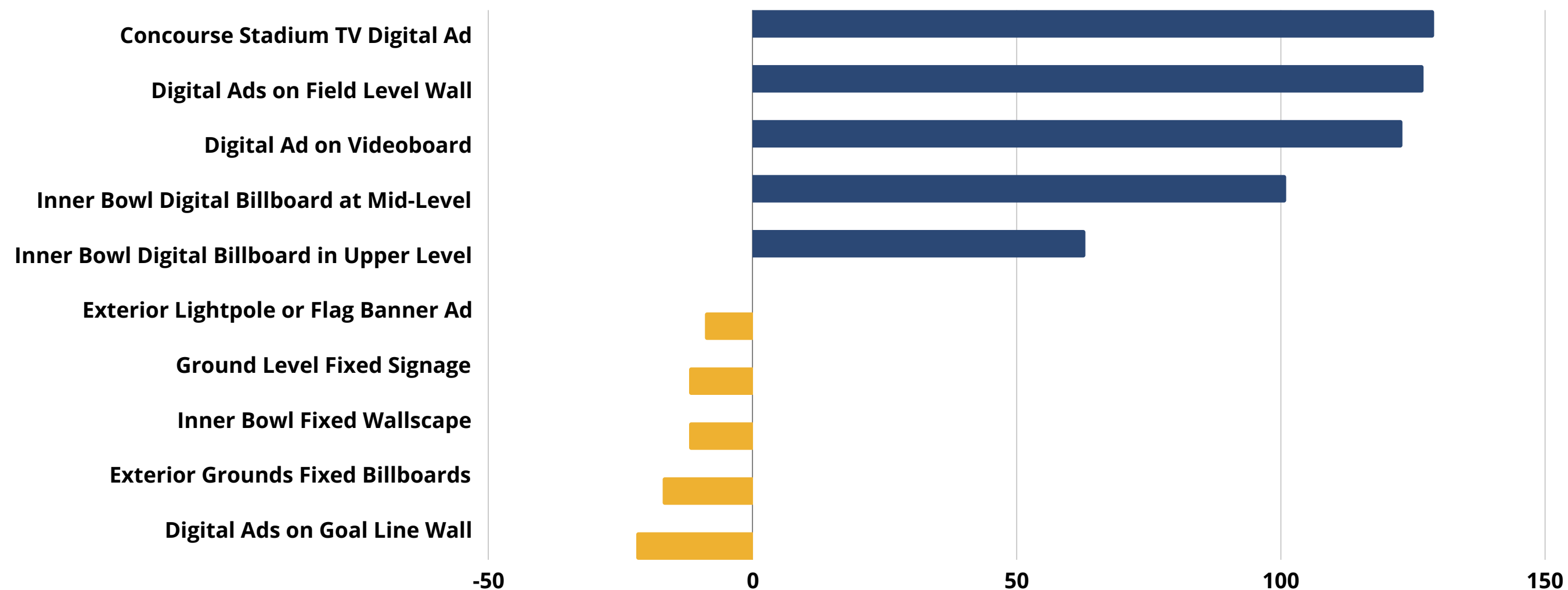


## Digital for the Win

Cutting-edge videoboards replace static assets as pro sports stadiums look to the future



### ASSET ACTIVATION HABITS IN 2023



MLS' migration to in-venue digital signage—a trend that SponsorUnited has been monitoring across all sports—continues unabated. Digital assets are steadily replacing former marquee assets whose popularity is falling sharply—namely Ground Level Fixed Signage, Inner Bowl Fixed Wallscape, and Exterior Grounds Fixed Billboards—as pro sports stadiums worldwide embrace the future of advertising.

## A World of Opportunity

The dazzling diversity of MLS athletes offers huge marketing potential for savvy brands

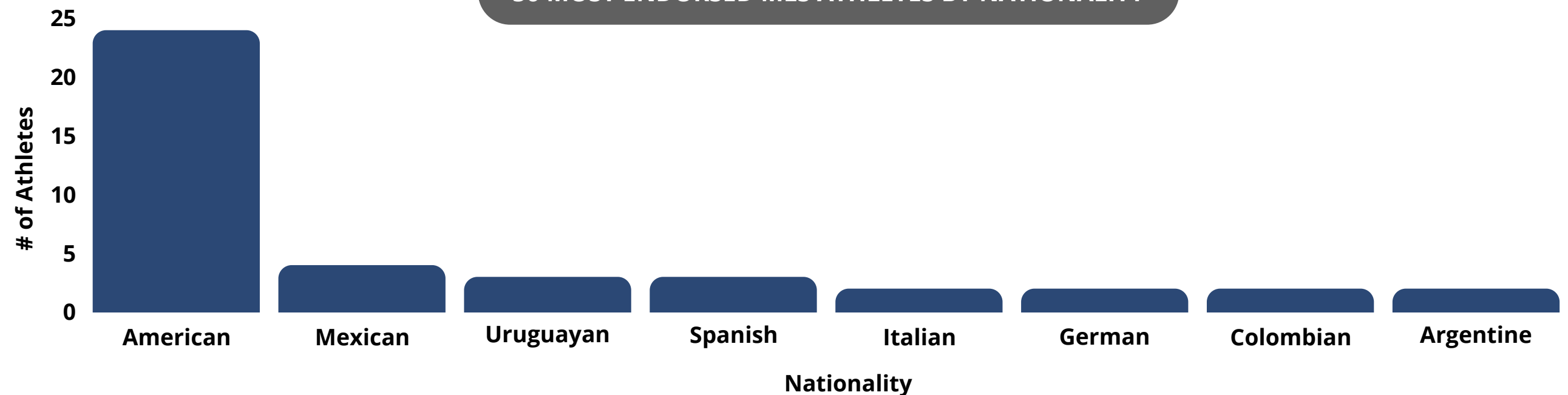
### Most Endorsed Players



MLS athletes hailed from 81 countries in the 2023 season—a remarkable feat that surpasses all other men's professional leagues in North America, and is double the number of nationalities represented in the second most diverse league, the NBA. Surprisingly, MLS also outpaces player diversity in any of the top five European football leagues—presenting a host of prime opportunities for marketers to tap into this vast pool of talent beyond American athletes.



### 50 MOST ENDORSED MLS ATHLETES BY NATIONALITY



\*8 additional nations with 1 athlete each not included

# Endorsement All-Star Team

Sponsorship Leaders by Position Including Social Audience Engagement Rate\*



\*across Instagram, X, and TikTok

# Leagues Cup: MLS x Liga MX Joining Forces

Brands holding more than three sponsored deal assets and are exclusive to Leagues Cup compared to MLS

GEICO



Coors Light



Gran Centenario



X World Wallet



Air Force Reserve



Jointly created by MLS and Liga MX, the Leagues Cup was a resounding triumph in its inaugural year, supported by key brand partnerships including adidas, AT&T, and GEICO. The competition's social accounts not only garnered a 86% higher engagement rate than the MLS account, but also witnessed an extraordinary 1500% growth on Instagram over the last 12 months, highlighting its massive digital potential. Inter Miami's victory further amplified the global buzz surrounding the tournament and marked a new record for Lionel Messi, as he became the player with the most titles in the history of soccer, with 44—positioning the cup as a dynamic new marquee event in North America.

# Future Outlook



# Rising Stars

Adidas: An Early Entrant Nurturing MLS' Homegrown Talent



**Cade Cowell**  
| San Jose Earthquakes

Apparel Partner: NOBULL  
Youngest to reach 100 MLS caps



**Benjamin Cremaschi**  
| Inter Miami CF

Apparel Partner: adidas  
365K Instagram followers



**John Tolkin**  
| NYRB

Apparel Partner: adidas  
Digital deal with EA SPORTS FC



**Brian Gutierrez**  
| Chicago Fire

Apparel Partner: adidas  
Named club's MVP in 2023



**Aidan Morris**  
| Columbus Crew

Apparel Partner: adidas  
Voted in MLS All-Star game

# San Diego FC

Untapped Opportunities Abound for Brands with the 2025 Expansion Team

## Soft Drink & Carbonated



Coca-Cola



Pepsi



Dr. Pepper

## FinTech (Financial Technology)



Shift4 Payments



Avant



TransCard

## Grooming & Toiletry Products



Gillette



Crest



Old Spice

## Snacks



Pringles



Snyder's of Hanover



Goldfish Crackers & Snacks

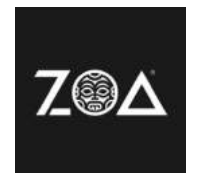
## Sports Drinks



BodyArmor



Powerade



ZOA Energy

San Diego FC's entry into MLS in 2025 offers brands a unique opportunity to garner early engagement and visibility, building on recent expansion teams' successful strategy of blending digital and traditional sponsorships. St. Louis City started modestly in 2021 with two sponsors—Purina, the club's current jersey sponsor, and Together Credit Union—and 18 digital deals. By its 2023 debut, the team had notably expanded its portfolio, boasting 60 sponsorships and 48 digital partnerships.



# Social



**brvndonvazquez**  17w

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Elevate your game on and off the pitch.

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# Most Engaging Athletes

Ranked by Audience Engagement Rate, with a Minimum of 10K Branded Engagements



**Brandon Vazquez** |  
FC Cincinnati  
8%



**Mateusz Klich** |  
D.C. United  
5%



**Christian Ramirez** |  
Columbus Crew  
4%



**Facundo Torres** |  
Orlando City  
3.5%



**Josef Martinez** |  
Inter Miami CF  
3%



**Lorenzo Insigne** |  
Toronto FC  
2.75%



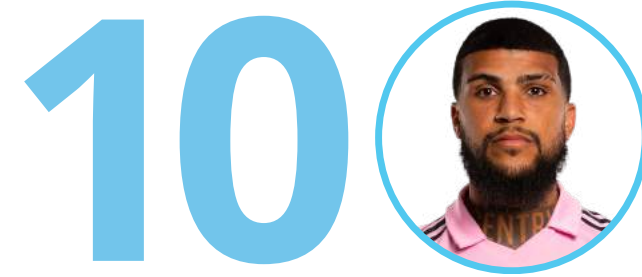
**Kellyn Acosta** |  
Los Angeles FC  
2.57%



**Carlos Vela** |  
Los Angeles FC  
1.67%



**Sebastian Lletget** |  
FC Dallas  
1.5%



**DeAndre Yedlin** |  
Inter Miami CF  
1%

# Most Followed Athletes

Top 10 MLS Athletes by Net Follower Increase



While the news of international superstars joining MLS makes headlines and elevates the league's profile worldwide, an often overlooked story is its positive impact on players' social followings. Of the top five athletes who have gained the most followers in the last year, three players joined MLS for the 2023 season—reflecting the league's role in boosting these athletes' visibility in the lucrative North American market, and in turn paving the way for valuable sponsorship opportunities stateside.

## Scoring on Social

Inter Miami's following and engagement soar after Messi's arrival

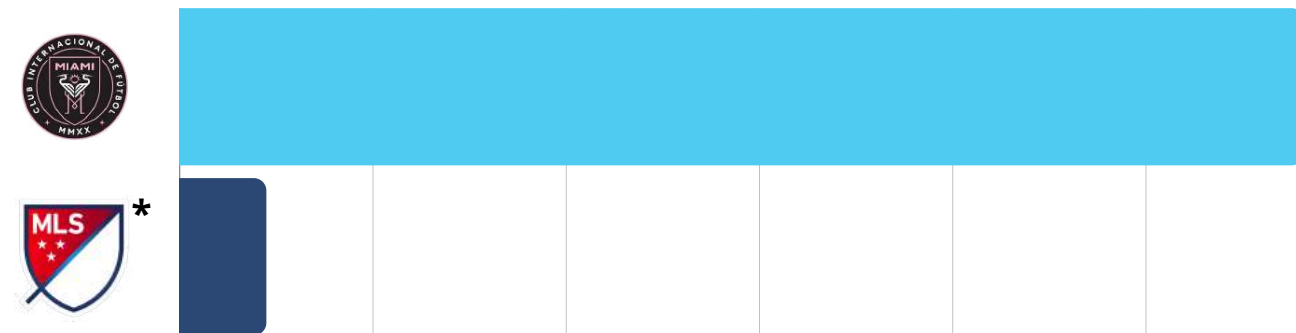


### Most Engaging Teams Ranked by Total Branded Engagement



#### INTER MIAMI SCORES IN BOTH FOLLOWER COUNT AND ENGAGEMENT

##### FOLLOWER COUNT



##### AUDIENCE ENGAGEMENT RATE



Inter Miami's social media success extends beyond its league-leading follower count: it not only ranks first in total branded engagement in MLS, but also fourth in the league for average audience engagement rate per post, at 0.3%—bucking the typical social media trend of the larger the following, the smaller the engagement rate.

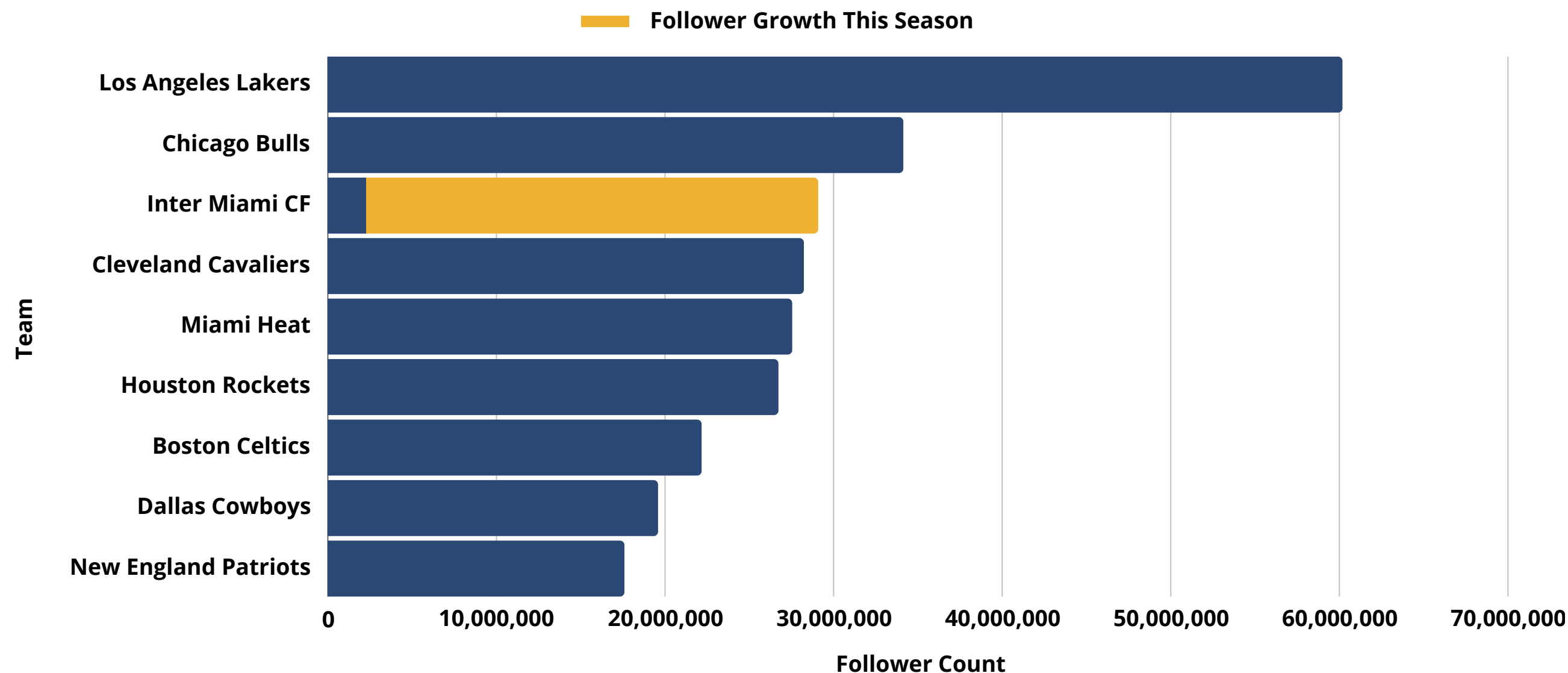
\*League Average

## Joining the Big Leagues

Inter Miami's Messi coup propels the team into pro sports' top tier on social



### MOST FOLLOWED MAJOR PRO TEAMS



Thanks to Inter Miami's signing of Lionel Messi, which shook the soccer world and spurred a massive spike in followers, the club is now the third most-followed major pro sports team in North America. While other leagues may boast higher profiles and larger social followings, MLS' audience demographics are arguably unbeatable for brands keen to connect with younger consumers: the league's fan base, 67% of which are Gen Zers and Millennials, is the youngest and most diverse in North American sports, with an average age of 37.4.

## Methodology

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This report, jointly authored by SponsorUnited's Marketing, Research & Insights, and Analytics department, presents an extensive analysis of over 805 brands, 2,200 sponsorship deals, and 23,000 sponsorship assets involving MLS and its teams, athletes, and brands. This data was obtained from SponsorUnited's proprietary platform and covers the period from February 1, 2023, through November 10, 2023.

Social media data is obtained from branded posts on the MLS league account, and the accounts of the 29 MLS teams across Instagram, TikTok, X, and Facebook from February 1, 2023, to November 10, 2023. MLS player endorsements are monitored based on the number of times they actively promote or advertise a brand via campaigns and activations within the past 12 months.

# Thank You

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Want more insights?

Email [info@SponsorUnited.com](mailto:info@SponsorUnited.com)