ASIASPONSORSHIPNEWS.COM

THE SPONSORSHIP EXPERTS
WWW.PAULPOOLE.CO.TH

An ASN report sponsored by Paul Poole (South East Asia) Co., Ltd. - The Sponsorship Experts

Photo Credit: Buriram United FC

FOOTBALL ASIA MARKET ANALYSIS 2023

Report Compiled: October 2023

This report focuses on the main metrics in the state of football sponsorship in Asia. It covers the recovery following the COVID-19 pandemic, which countries led the field - and which demonstrated the fastest growth – and it looks at how football compared to other platforms. It contains detailed information on top-spending brands, as well as on sponsorship categories, and looks at the potential impact of the increased attention on Asian football.

Appendices I-V cover football sponsorship across individual countries.

Cost:
Free - premium subscribers
US$750 excl. VAT - non-premium subscribers

Content

Overview 3

2019 – 2022: COVID-19 pandemic & the recovery 3

Country rankings 4

Top sponsorship platforms 5

Top sponsor categories 6

Top spending brands 7

Conclusion 9

Appendix I: Japan 10
Appendix II: Pan-Asia 13
Appendix III: China 16
Appendix IV: South Korea 19
Appendix V: Thailand 22

About Asia Sponsorship News Co., Ltd. 25

About Paul Poole (South East Asia) Co., Ltd. 26

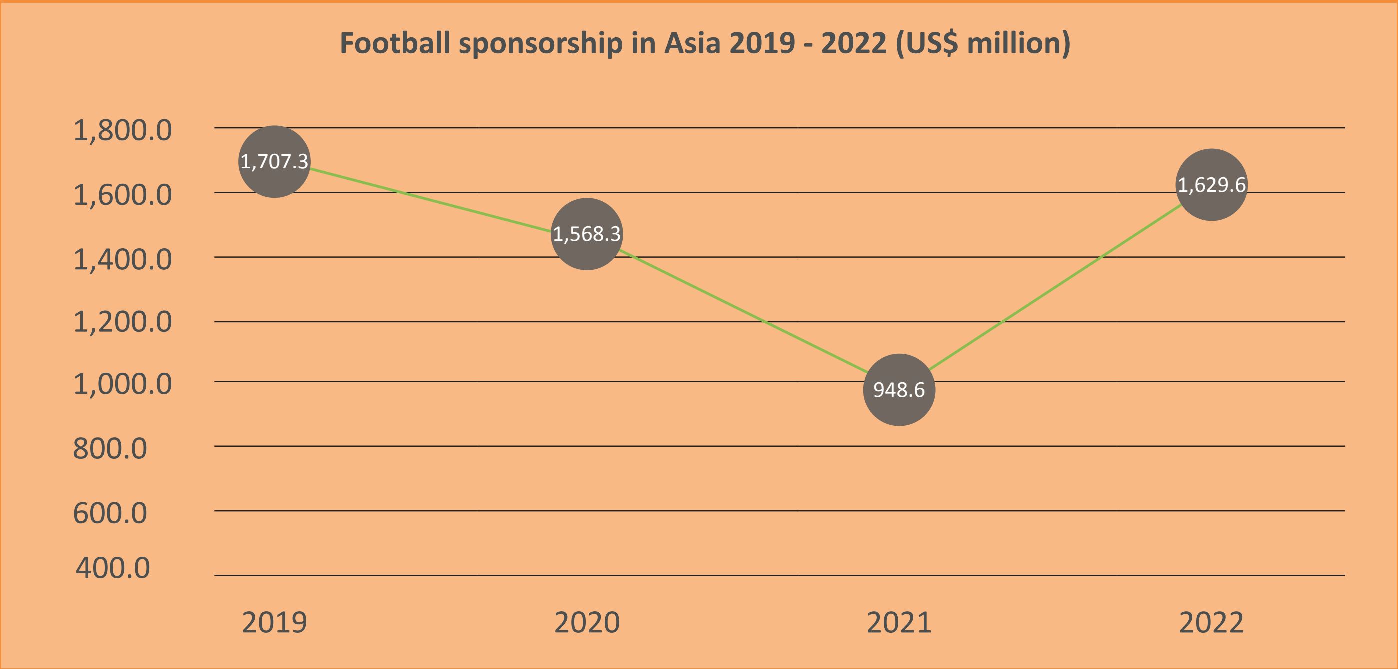
Overview

Four countries, together with *Pan-Asia, dominated the Asian sponsorship market for football, accounting for US$ 1,540.8 million, or 94.5% of all football sponsorship sales in 2022.

*For the purpose of this report, 'Pan-Asia' means multi-market deals that extend beyond any one Asian territory.

	2022	
Country	**US$ (000)**	**% of the market**
Japan	452.5	27.8%
China	320.5	19.7%
South Korea	98.5	6.0%
Thailand	89.6	5.5%
Pan-Asia	579.7	35.6%
TOTAL	**1,540.8**	**94.5%**
TOTAL ALL COUNTRIES	**1,629.6**	**100.0%**

2019 - 2022: COVID-19 pandemic & the recovery

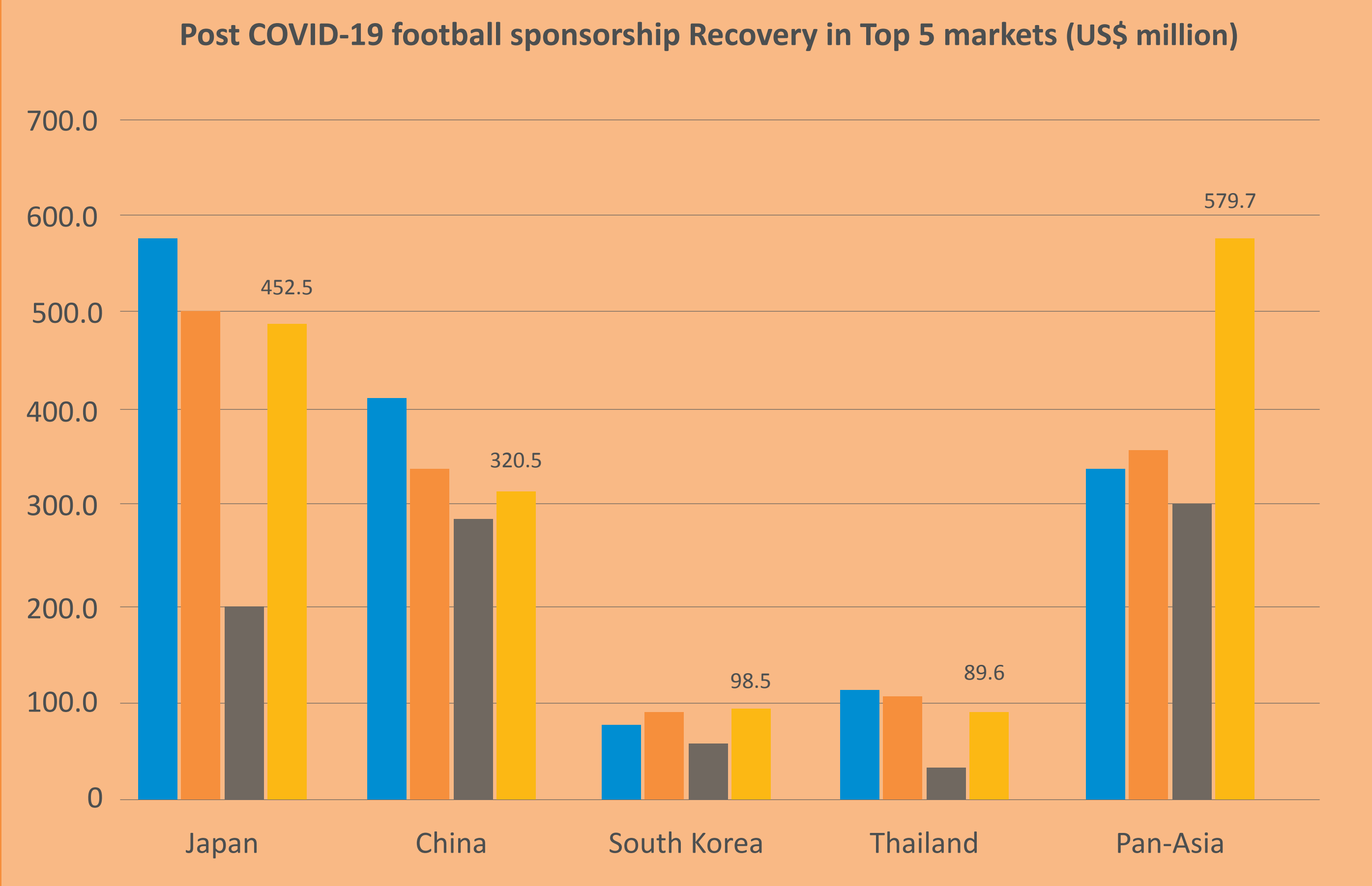


After a 40% slump in 2021, football sponsorship post-pandemic has shown promising recovery throughout Asia, with overall sales in 2022 close to pre-pandemic levels. The 2022 FIFA World Cup – which saw for the first time six countries from the Asian Football Confederation (AFC) qualify – together with the upcoming 2023 Women's World Cup (the first to be held in the southern hemisphere), appears to have given Asian football sponsorship a much-need boost out of the pandemic doldrums.

Country rankings

Only South Korea and the Pan-Asia sector have exhibited growth over 2019 – at +39% and +66% respectively. Japan dropped 22% over 2019 achievements but remains at the top of the country table, while falling behind Pan-Asia – where major international football tournaments gave deals with overseas rights holders a boost.

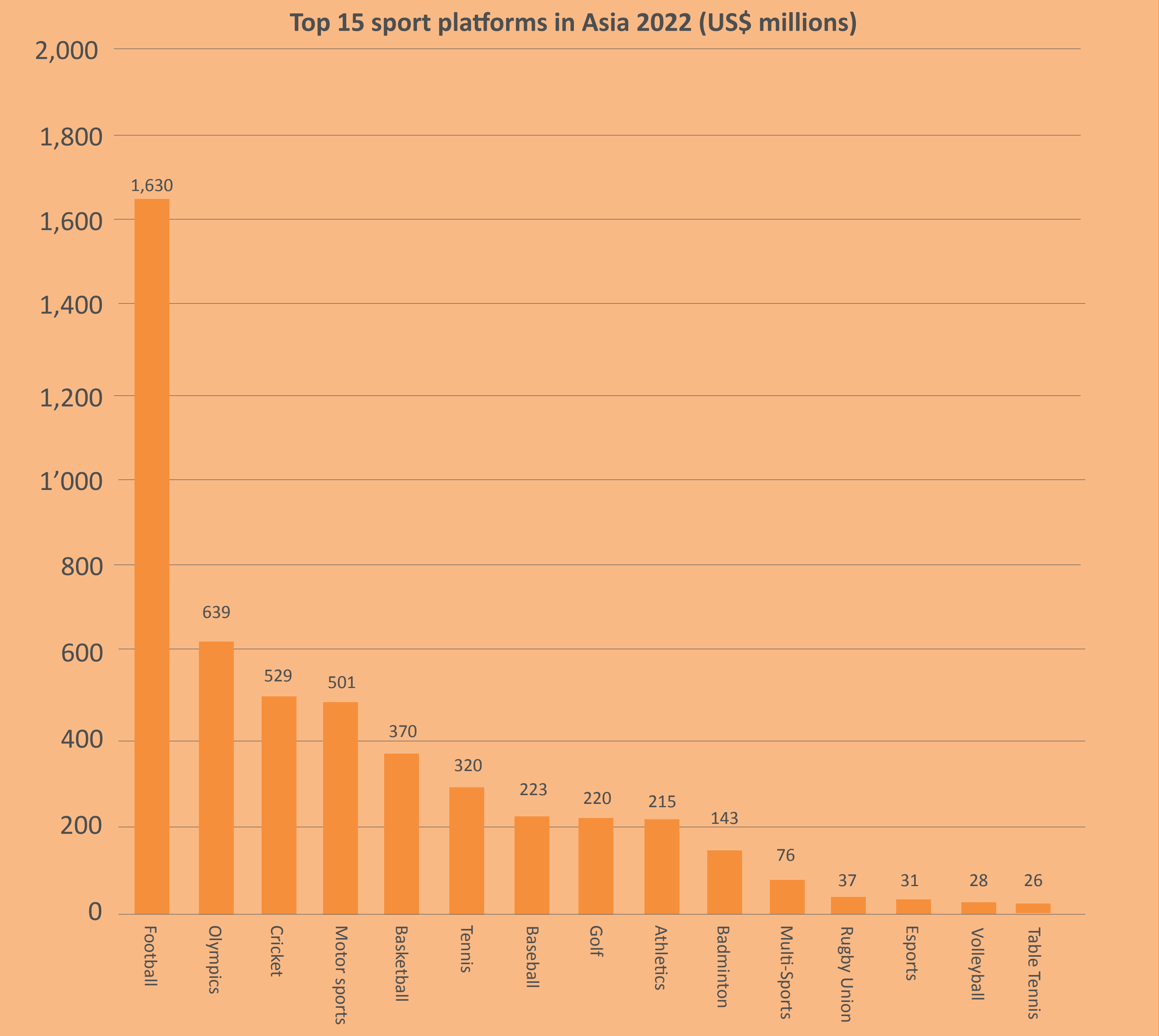
Leading football country Japan's continued strength when compared with much bigger rival, China, reflects the progress football has made in Japan, where 2023 sees the J. League's 3 divisions expand to 60 members across 41 of 47 prefectures. Testament, also, to the depth of Japan's soccer maturity is that 19 of the country's 26 players at the 2022 FIFA World Cup currently play for clubs in Europe.



	2019	2022	
	US$ millions		+/-%
Japan	581.3	452.5	**-22%**
China	422.7	320.5	**-24%**
South Korea	70.8	98.5	39%
Thailand	119.8	89.6	**-25%**
Pan-Asia	349.7	579.7	66%

Top sponsorship platforms

Football is by far the most valuable platform in Asia, accounting for almost 31% of all sport sponsorship sold in 2022. The platform was valued at 2.5 times its nearest 2022 'rival', 'Olympics', and showed +21% increase over the 4-year football average.



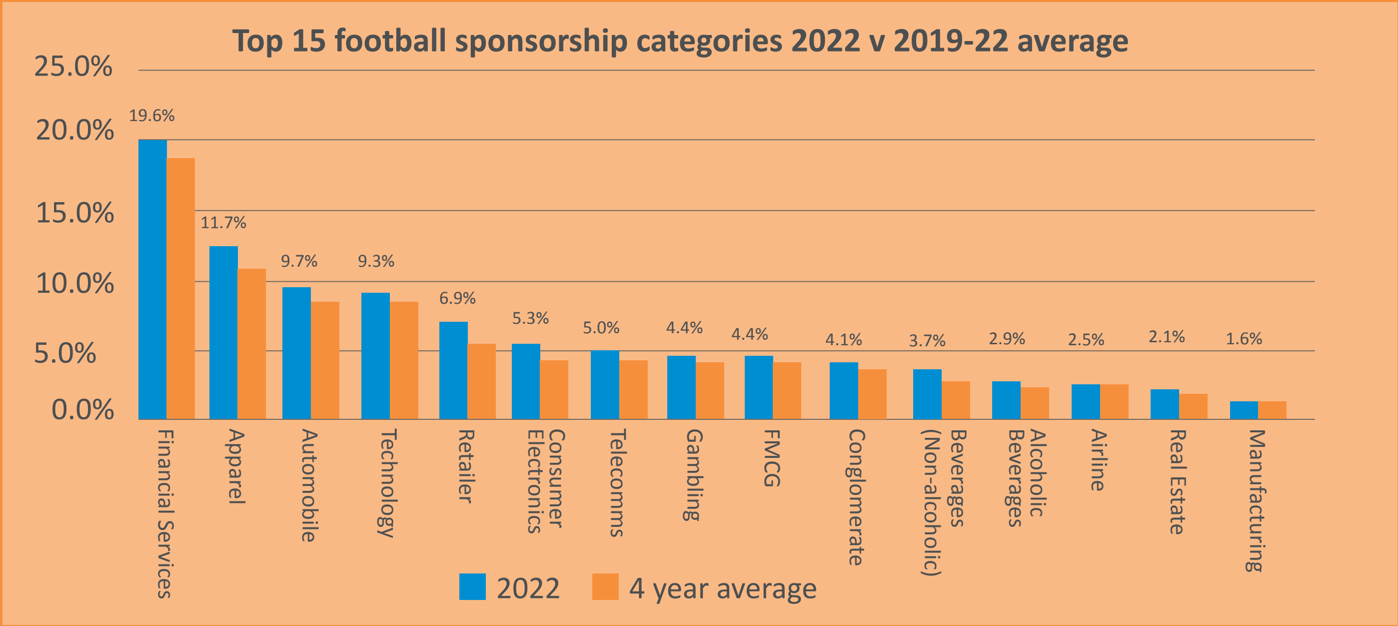
US$ millions

GRAND TOTAL	**5,365**	**%**
Football	1,630	30.4%
Olympics	639	11.9%
Cricket	529	9.9%
Motorsports	501	9.3%
Basketball	370	6.9%
TOP 5 TOTAL	**3,669**	**68.4%**

Top sponsor categories

The top 15 football sponsorship categories accounted for 93% of total sponsorship in 2022, with 50% derived from the top four: financial services, apparel, automobile and technology. Overall, 2022 levels are slightly higher than the four-year average, although rankings have changed.

Automobile, technology, consumer electronics, telecoms and beverages (non-alcoholic) all moved up a notch or two, while retail, gambling, conglomerates and real estate edged downwards. The most significant movements saw financial services replace apparel at the top and technology replace retail in the top four.



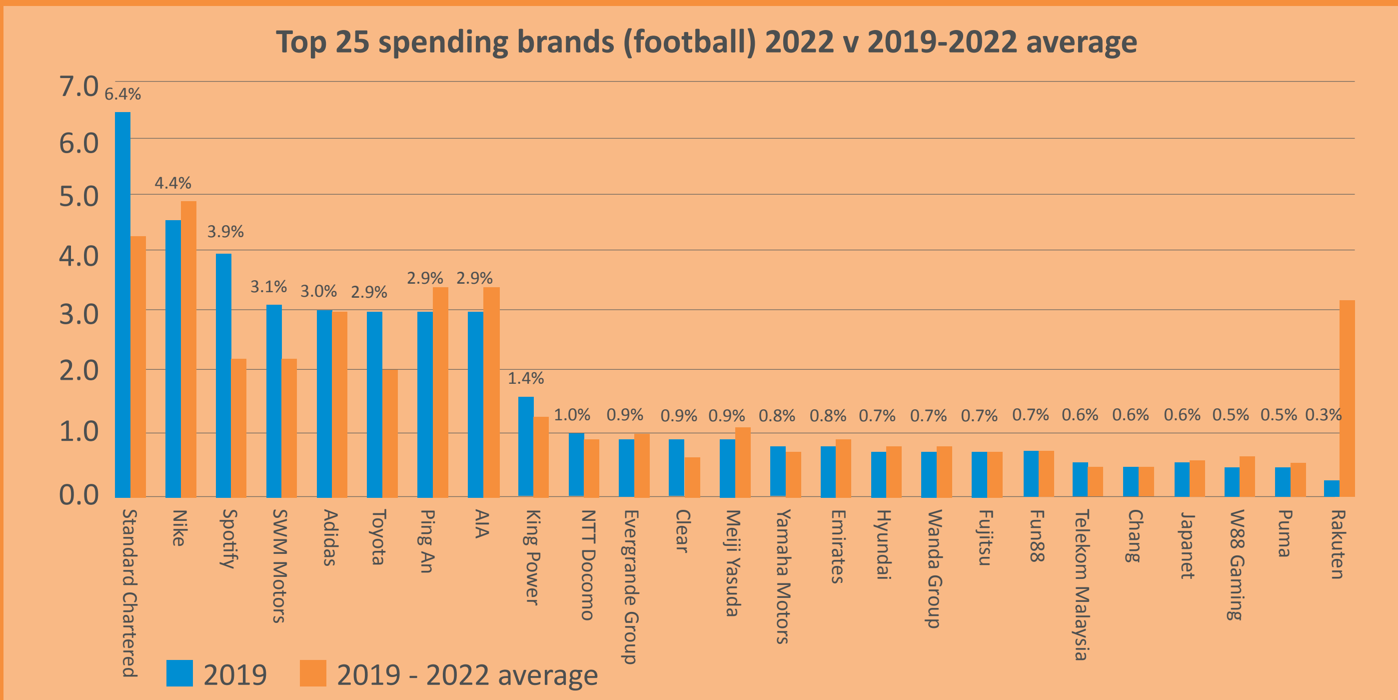
Top 15 sponsorship categories 2022 (US$ million)

Financial Services	324.0	19.6%
Apparel	193.7	11.7%
Automobile	161.3	9.7%
Technology	154.0	9.3%
Retailer	115.1	6.9%
Consumer Electronics	87.6	5.3%
Telecomms	83.6	5.0%
Gambling	73.6	4.4%
FMCG	72.5	4.4%
Conglomerate	68.2	4.1%
Beverages (Non-alcoholic)	62.0	3.7%
Alcoholic Beverages	47.4	2.9%
Airline	40.9	2.5%
Real Estate	35.5	2.1%
Manufacturing	27.0	1.6%
	1,546.2	**93.3%**

Top spending brands

The top 5 brands accounted for 23% of the market, a further 20 brands bringing that up to 47%. The remaining 53% was spread amongst 1,700 brands with sponsorship values ranging from US$ 10,000 to US$ 33m.

Standard Chartered, Spotify, SWM Motors, Adidas and Toyota all exceeded the 2019-22 average investment in 2022; the other leading sponsors reduced their investment.



2022 saw some noteworthy cuts in sponsorship, with Chinese Ping An Insurance (invested US$ 147,000m in the Chinese Super League in 2019, 2020 & 2021 – zero in 2022) and Japanese technology company, Rakuten, (invested US$ 187,516m Barcelona FC in 2019, 2020 & 2021 – zero in 2022) dropping down the tables while top betting website, ManBetX, (invested US$ 31m in Wolves FC in 2019, 2020 & 2021 – zero in 2022) pulled out of football sponsorship completely.

Top spending brands

Standard Chartered, with its US$ 60m investment in Liverpool FC replaced Nike as the top football sponsor in 2022.

Top 25 spending brands (football) & their biggest deals - 2022

	US$ 000	%	Deals	Biggest deal	US$ 000
Grand total	**1,629.6**	**100%**	**1,392**		
Standard Chartered	115.6	7.1%	3	Liverpool FC	60.0
Nike	79.9	4.9%	24	Chinese Super League (CSL)	30.1
Spotify	70.0	4.3%	2	Barcelona FC	60.0
SWM Motors	56.8	3.5%	1	Chinese Super League (CSL)	56.8
Adidas	53.9	3.3%	18	Japan Football Association	21.5
Sub total Top 5	**376.3**	**23.1%**			
Toyota	52.9	3.2%	16	Da Ka Pei Ni Kan	20.0
Ping An	52.8	3.2%	5	Chinese Super League (CSL)	49.0
AIA	52.2	3.2%	7	Tottenham Hotspur FC	50.0
King Power	25.9	1.6%	4	Leicester City FC	20.0
NTT Docomo	19.0	1.2%	3	Omiya Ardija	10.5
Evergrande Group	17.1	1.0%	1	Guangzhou Football Club	17.0
Clear	16.6	1.0%	2	Da Ka Pei Ni Kan	10.0
Meiji Yasuda	15.5	0.9%	2	J-League	14.8
Yamaha Motors	14.6	0.9%	4	Jubilo Iwata	13.8
Emirates	14.0	0.9%	1	Real Madrid	14.0
Hyundai	13.2	0.8%	10	Atletico Madrid FC	5.6
Wanda Group	12.2	0.7%	3	Wanda Metropolitana Stadium	10.0
Fujitsu	12.1	0.7%	1	Kawazaki Frontale	12.0
Fun88	11.8	0.7%	2	Newcastle United FC	10.6
Telekom Malaysia	11.6	0.7%	2	Liga Malaysia	10.6
Chang	10.9	0.7%	16	Football Association of Thailand	3.2
Japanet	10.1	0.6%	1	V-Varen Nagasaki	10.1
W88 Gaming	8.5	0.5%	2	Fulham FC	8.0
Puma	8.5	0.5%	12	Cerezo Osaka	2.7
Rakuten	5.9	0.4%	3	Vissel Kobe	4.3
Sub total 6-25	**385.5**	**24%**			
TOTAL TOP 25	**761.8**	**47%**			

Conclusion

A record six Asian teams qualifying for the FIFA World Cup 2022. Asia hosting the AFC Women's Asian Cup and FIFA Women's Under-17 World Cup. Japan, after wins against World Cup giants Germany and Spain in the group stages, finished top of its group and qualified for the round of 16 knockouts.

There is no doubt that the eyes of the world were on Asian football in 2022, reflected in football sponsorship's quick recovery from the pandemic-induced slump in 2021.

While the market's overall performance bounced back to almost 2019 levels, two sectors bucked the trend with strong growth. South Korea grew by +36% and Pan-Asia by a whopping +67% – the former influenced by the growing popularity of football (football has overtaken baseball as South Korea's favourite sport) and the latter by the plethora of major football events taking place in Asia during 2022 and into 2023 – as well as the continuing huge popularity of European 'tier one' club football in Asia.

In this context, it is telling that some of the biggest sponsorship deals closed for 2022 were for the likes of Liverpool FC, Barcelona FC, Tottenham Hotspur FC, Leicester City FC, Real Madrid, Atletico Madrid FC, Newcastle United FC and Fulham FC.

With almost 20% of total football sponsorship, financial services toppled apparel from the sponsorship categories' top spot – with four of the top 15 sponsors accounting for 15%, the remaining 5% spread over 130 companies with investments ranging from US$ 5m all the way down to US$ 20,000.

Standard Chartered overtook Nike as the top sponsoring brand, largely due to their shirt sponsorship deal with Liverpool FC – a deal they announced on July 14, 2022, and which has been confirmed going forward to the end of the 2026-27 season.

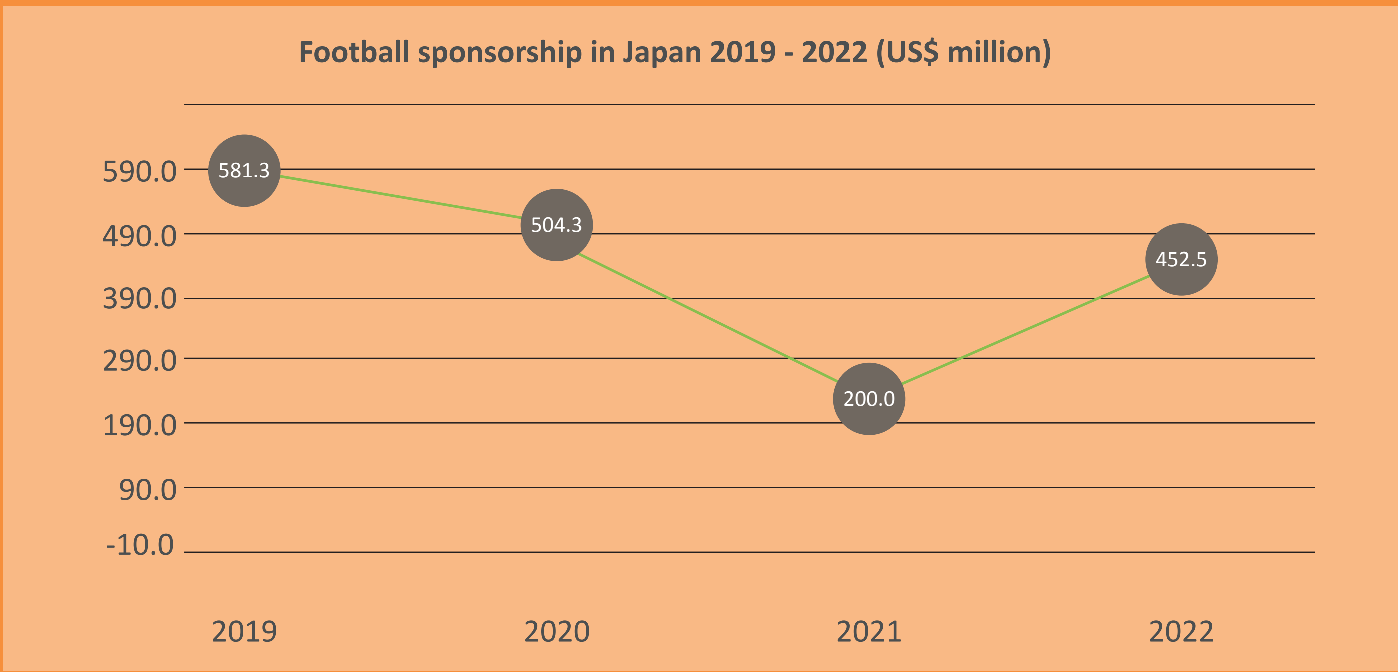
On balance, the end of 2022 saw football sponsorship in Asia in a strong position with the opportunity to capitalise on the attention football in the region enjoyed during the year.

Data correct as of October 2023. All figures in US$.

Appendix I: Japan

Japan: overview

In 2019 Japan topped the football sponsorship charts with just under US$ 160m higher investment than its then nearest rival, China. However, recovery post COVID-19 pandemic left Japan -22% on its 2019 achievement.

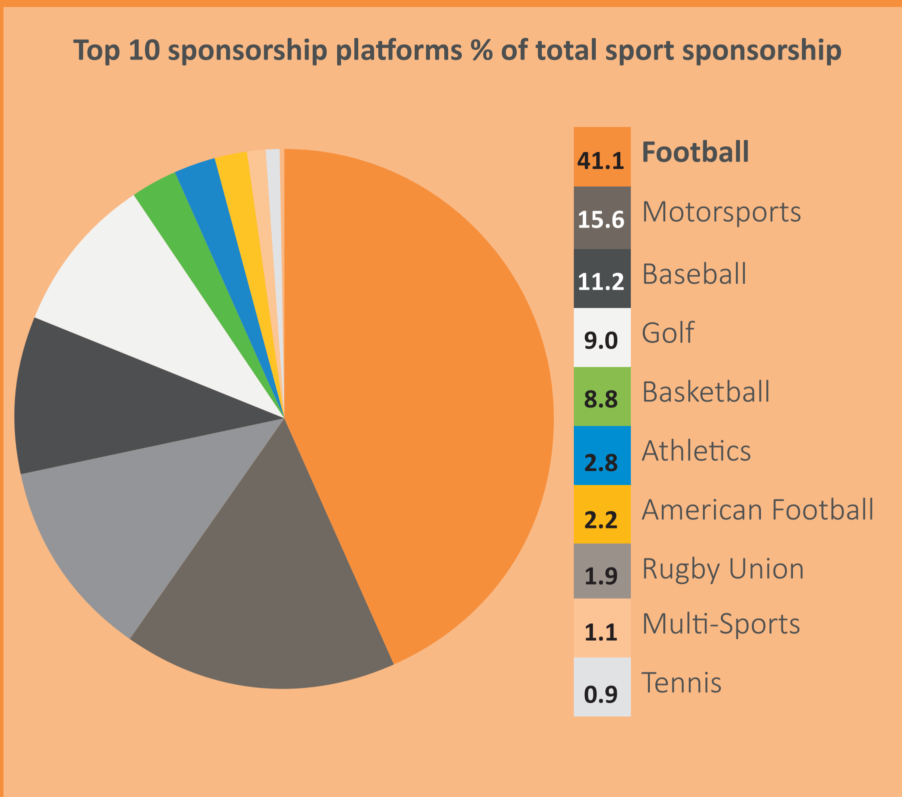


Japan: sponsorship platforms

86% of all sports sponsorship came from the top five platforms: football, motorsports, baseball, golf and basketball. Football leads the field with a value of US$ 452m or 41% of the total. The next five platforms added 9%, meaning almost 95% of sport sponsorship derived from just 10 platforms.

Top 10 sports platforms 2022 JAPAN: (US$ million)

Platform	US$	%
Football	**452.5**	**41.1%**
Motorsports	171.6	15.6%
Baseball	123.6	11.2%
Golf	99.1	9.0%
Basketball	96.5	8.8%
Athletics	30.7	2.8%
American Football	23.8	2.2%
Rugby Union	20.8	1.9%
Multi-Sports	11.6	1.1%
Tennis	10.4	0.9%
TOP 10	**1,040.5**	**94.5%**
TOTAL SPORTS	**1,101.0**	**100%**



Appendix I: Japan

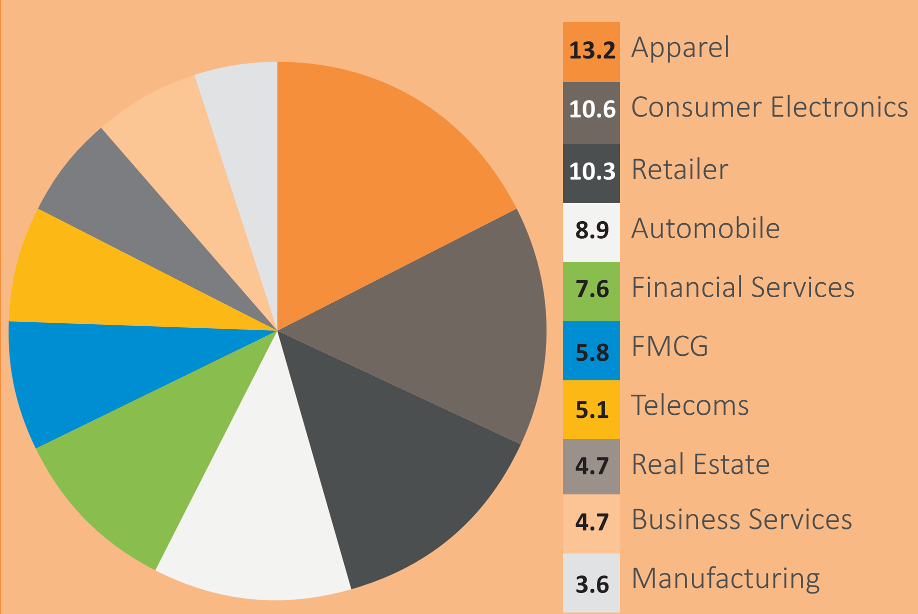
Japan: top sponsor categories

Apparel led the field at US$ 60m, one third of which came from Adidas sponsorship of the Japan Football Association. Apparel was followed closely by consumer electronics at US$ 48m. The top five sponsorship categories accounted for 50% of the total, while the next five added another 25%. Financial services, the Asian category leader, just made it into Japan's top five with US$ 34m.

Football sponsor categories 2022 JAPAN: (US$ million)

Category	US$	%
Apparel	60.0	13.2%
Consumer Electronics	48.1	10.6%
Retailer	46.6	10.3%
Automobile	40.4	8.9%
Financial Services	34.4	7.6%
FMCG	26.3	5.8%
Telecoms	23.2	5.1%
Real Estate	21.4	4.7%
Business Services	21.3	4.7%
Manufacturing	16.1	3.6%
TOP 10	**337.6**	**74.6%**
TOTAL FOOTBALL	**452.5**	**100%**

Top 10 sponsor categories %age of total football sponsorship



Japan: top spending brands

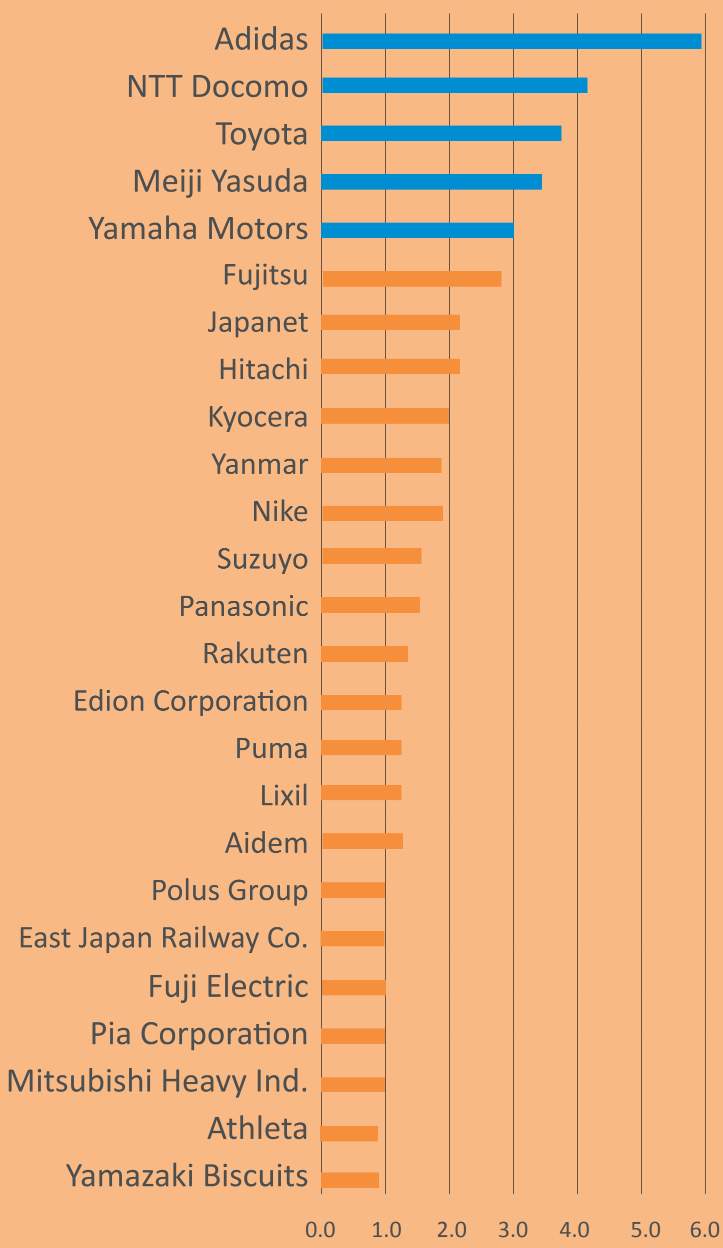
316 individual brands made up football sponsorship investment in Japan. The top 10 brands accounted for only 31% of the total; the top 25 bought that up to 49%. Despite Adidas's impact on apparel's No. 1 slot in the sponsorship categories, the brand accounted for only 5.9% of the total, while Nike – at US$ 8.4m failed to make it into the top 10.

Appendix I: Japan

Football top spending brands 2022 JAPAN: (US$ million)

Brands	US$ 000	%
Adidas	26.5	5.9%
NTT Docomo	19.0	4.2%
Toyota	17.1	3.8%
Meiji Yasuda	15.5	3.4%
Yamaha Motors	13.8	3.0%
Fujitsu	12.1	2.7%
Japanet	10.1	2.2%
Hitachi	9.8	2.2%
Kyocera	9.1	2.0%
Yanmar	8.7	1.9%
Nike	8.4	1.9%
Suzuyo	6.4	1.4%
Panasonic	6.3	1.4%
Rakuten	5.9	1.3%
Edion Corporation	5.6	1.2%
Puma	5.5	1.2%
Lixil	5.2	1.2%
Aidem	5.2	1.2%
Polus Group	4.7	1.0%
East Japan Railway Co.	4.5	1.0%
Fuji Electric	4.5	1.0%
Pia Corporation	4.4	1.0%
Mitsubishi Heavy Ind.	4.4	1.0%
Athleta	4.2	0.9%
Yamazaki Biscuits	3.9	0.9%
TOP 25 BRANDS	**221.0**	**48.8%**
TOTAL FOOTBALL	**452.5**	**100%**

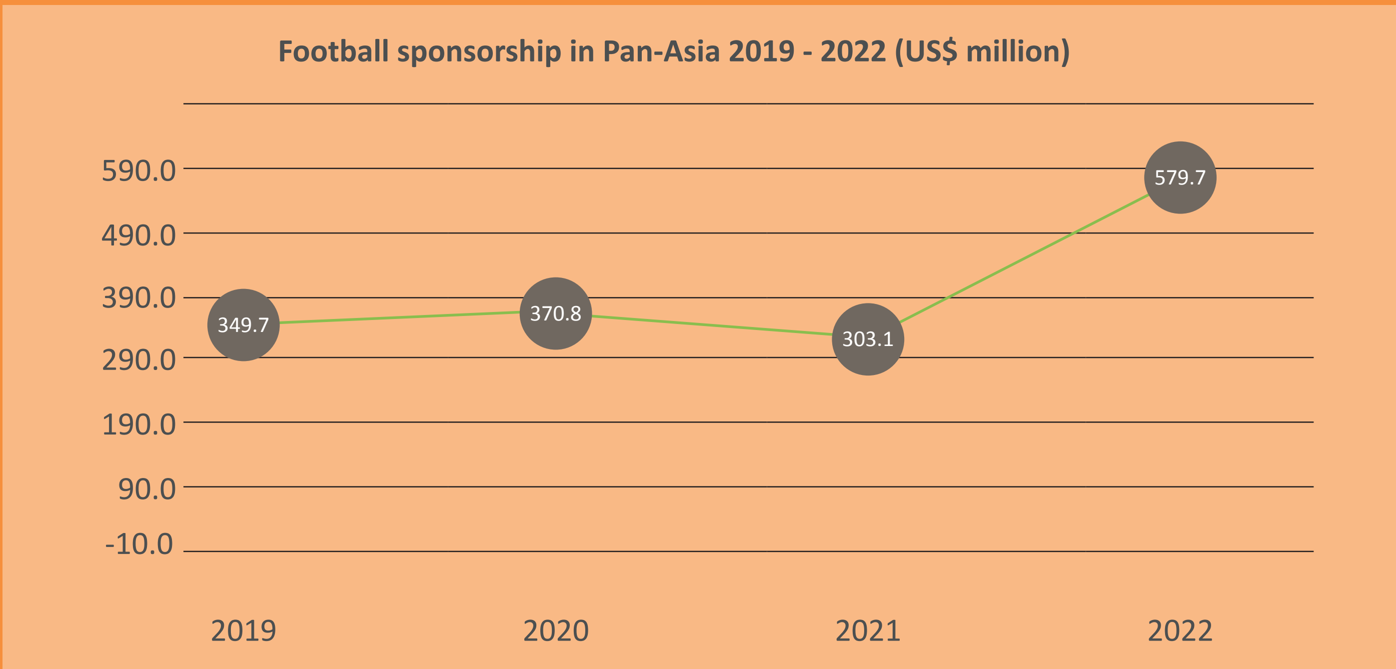
Top 25 spending brands %age of the total football sponsorship in 2022



Appendix II: Pan-Asia

Pan-Asia: overview

Pan-Asia ranked third for Aian football sponsorship investment in 2019, behind Japan and China. Its dramatic growth since the low point in 2021 (+66% on 2019) left Pan-Asia positioned in 2022 as the leading market for sponsorship in Asia.

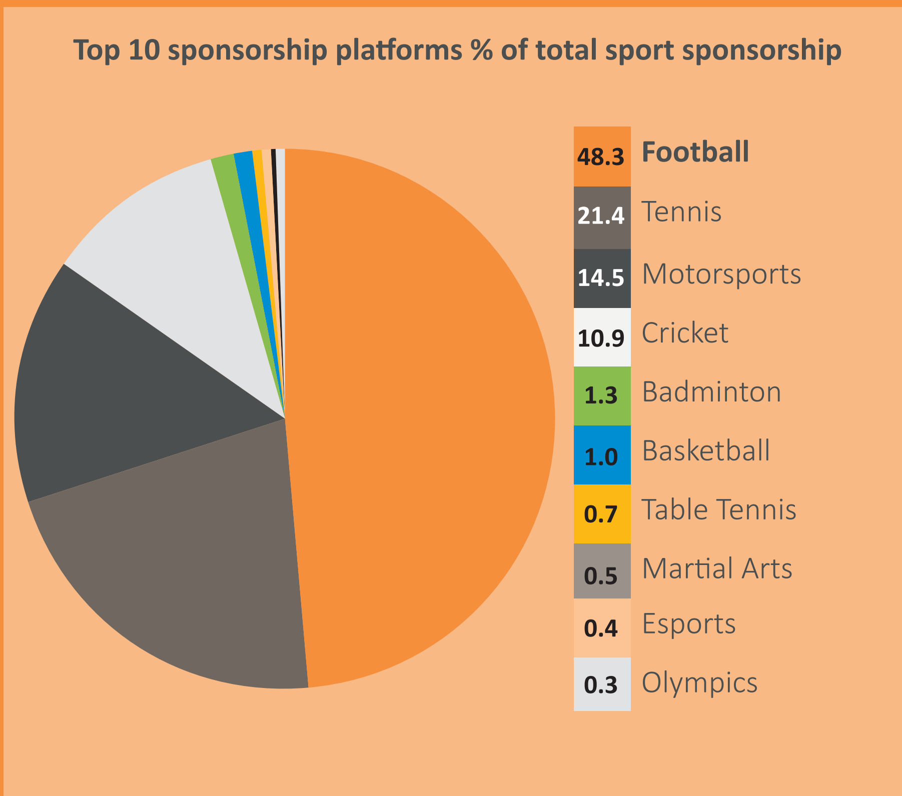


Pan-Asia: sponsorship platforms

Almost 40% of Pan-Asia sport sponsorship was derived from football and, together with tennis, motorsports and cricket, the top four accounted for 95% of all sport sponsorship.

Top 10 sports platforms 2022 PAN-ASIA: (US$ million)

Platform	US$	%
Football	**579.7**	**48.3%**
Tennis	256.7	21.4%
Motorsports	173.4	14.5%
Cricket	131.3	10.9%
Badminton	15.6	1.3%
Basketball	11.8	1.0%
Table Tennis	8.1	0.7%
Martial Arts	6.2	0.5%
Esports	4.6	0.4%
Olympics	3.5	0.3%
TOP 10	**1,191.0**	**99.3%**
TOTAL SPORTS	**1,101.0**	**100%**



Appendix II: Pan-Asia

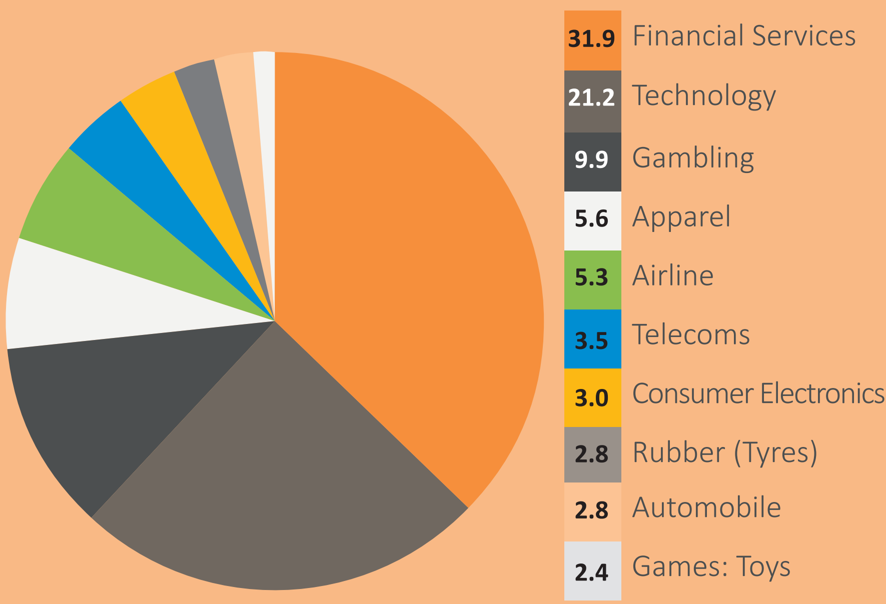
Pan-Asia: top sponsor categories

Two categories – financial services and technology – dominated Pan-Asia with 53% of total football sponsorship. Just three deals by Standard Chartered and AIA made up 89% of the financial services total. The top 10 ranking categories accounted for 87% of total football sponsorship.

Football sponsor categories 2022 PAN-ASIA: (US$ million)

Category	US$	%
Financial Services	184.8	31.9%
Technology	122.8	21.2%
Gambling	57.7	9.9%
Apparel	32.5	5.6%
Airline	31.0	5.3%
Telecoms	20.3	3.5%
Consumer Electronics	17.4	3.0%
Rubber (Tyres)	16.5	2.8%
Automobile	16.4	2.8%
Games: Toys	14.0	2.4%
TOP 10	**513.3**	**86.6%**
TOTAL FOOTBALL	**579.7**	**100%**

Top 10 sponsor categories %age of total football sponsorship



Appendix II: Pan-Asia

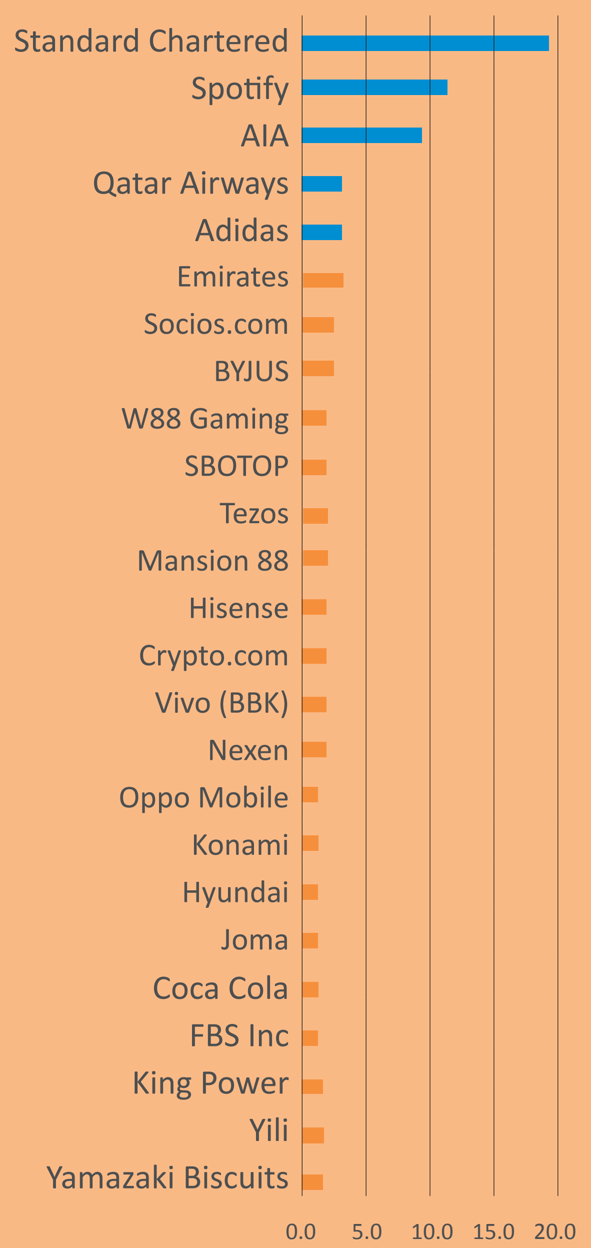
Pan-Asia: top spending brands

134 brands invested in Pan-Asian football sponsorship but three of them dominated the field: Standard Chartered, Spotify and AIA, sharing 40.5% of the total between them. Standard Chartered led the field, accounting for 19.8% of the total. Jumping into second spot was Spotify, with its US$ 60m Barcelona FC deal, followed by AIA with a US$ 50m investment in Tottenham Hotspur FC. The top 10 brands accounted for 54.7% of the total, while 70.3% was derived from the top 25 brands.

Football top spending brands 2022 PAN-ASIA: (US$ million)

Brands	US$ 000	%
Standard Chartered	114.6	19.8%
Spotify	70.0	12.1%
AIA	50.0	8.6%
Qatar Airways	17.0	2.9%
Adidas	15.0	2.6%
Emirates	14.0	2.4%
Socios.com	10.1	1.7%
BYJUS	10.0	1.7%
W88 Gaming	8.5	1.5%
SBOTOP	8.0	1.4%
Tezos	8.0	1.4%
Mansion 88	7.4	1.3%
Hisense	7.3	1.3%
Crypto.com	6.5	1.1%
Vivo (BBK)	6.5	1.1%
Nexen	6.4	1.1%
Oppo Mobile	6.0	1.0%
Konami	5.9	1.0%
Hyundai	5.6	1.0%
Joma	5.6	1.0%
Coca Cola	5.5	1.0%
FBS Inc	5.0	0.9%
King Power	5.0	0.9%
Panini	4.8	0.8%
Yili	4.6	0.8%
TOP 25 BRANDS	**407.4**	**70.3%**
TOTAL FOOTBALL	**579.7**	**100%**

Top 25 spending brands %age of the total football sponsorship in 2022

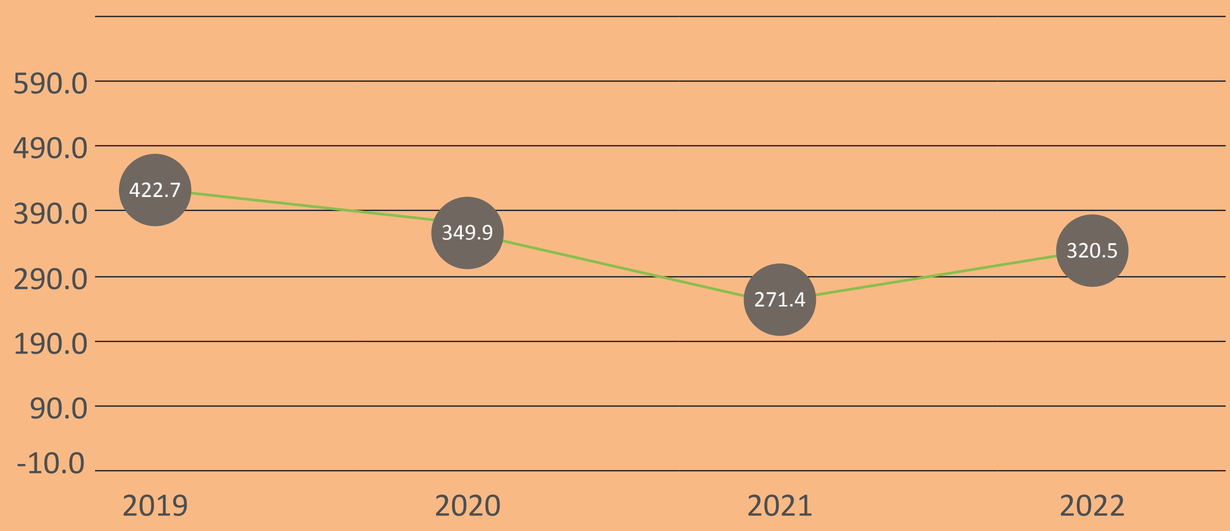


Appendix III: China

China: overview

China avoided the extreme drop in football sponsorship investment in 2021 suffered by Japan (-66% on 2019) but still finished 2022 at -24% compared with 2019 after a slower than average recovery.

Football sponsorship in China 2019 - 2022 (US$ million)



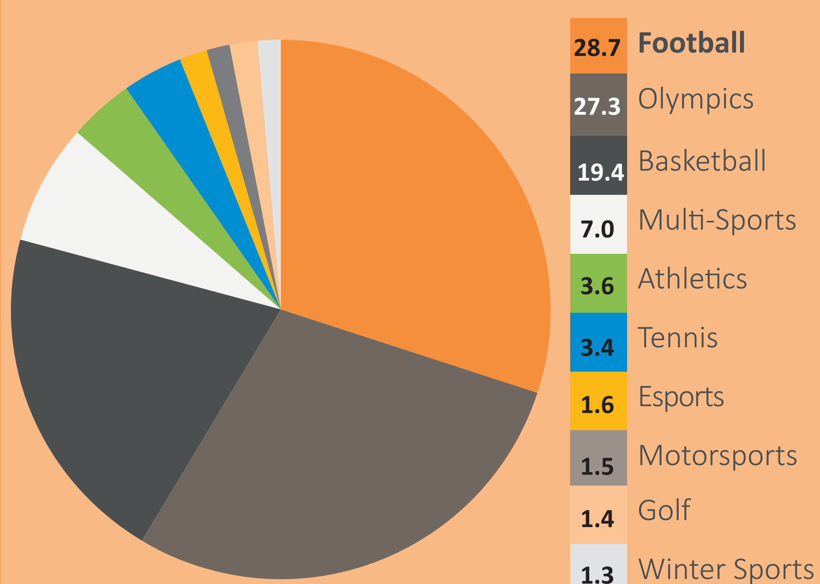
China: sponsorship platforms

While football still led the sponsorship field in China, it was less dominant than in Japan or Pan-Asia, accounting for 28.7% (US$ 320.5m) of total sport sponsorship investment. Coming a close second was the Olympics (27.3%), followed by basketball (19.4%). Together these three platforms made up 75.4% of the total. The remaining seven platforms in the top 10 brought that to 95.2%. Badminton fell just outside the top 10 with US$ 12m or 11.9%.

Top 10 sports platforms 2022 CHINA: (US$ million)

Platform	US$	%
Football	**320.5**	**28.7%**
Olympics	305.4	27.3%
Basketball	217.0	19.4%
Multi-Sports	78.0	7.0%
Athletics	40.3	3.6%
Tennis	38.2	3.4%
Esports	18.1	1.6%
Motorsports	17.0	1.5%
Golf	16.0	1.4%
Winter Sports	14.5	1.3%
TOP 10	**1,065.1**	**95.2%**
TOTAL SPORTS	**1,118.5**	**100%**

Top 10 sponsorship platforms % of total sport sponsorship



Appendix III: China

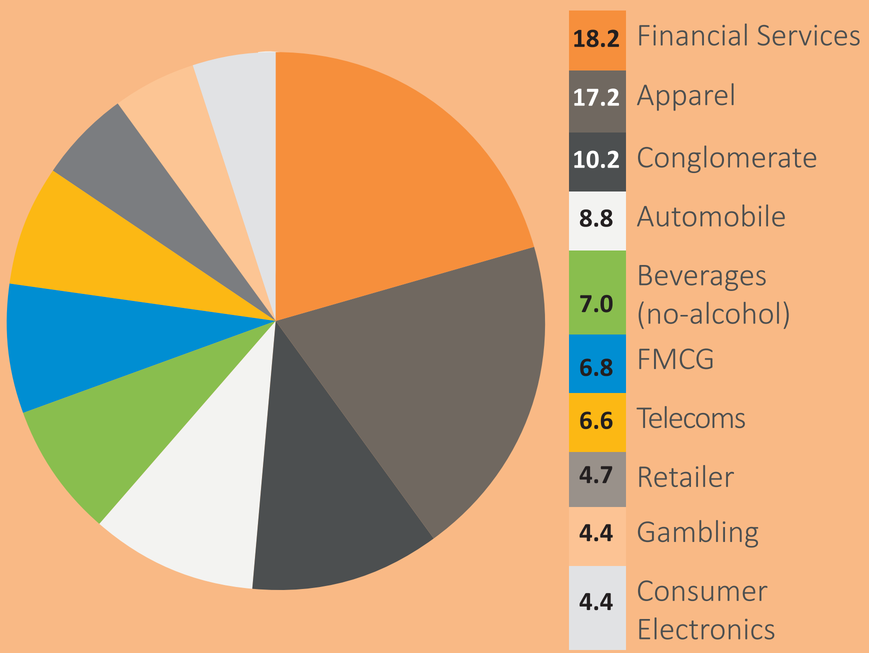
China: top sponsor categories

The top 3 categories: financial services (US$ 58.5m), apparel (US$ 55.2m) and conglomerates (US$ 32.8m) stood out, accounting for 45.7% of all sport sponsorship in China. The next seven brought football sponsorship in the top 10 up to US$ 283.7m or 88.5% of total sport investment.

Football sponsor categories 2022 CHINA: (US$ million)

Category	US$	%
Financial Services	58.5	18.2%
Apparel	55.2	17.2%
Conglomerate	32.8	10.2%
Automobile	28.2	8.8%
Beverages (no-alcohol)	22.4	7.0%
FMCG	21.9	6.8%
Telecoms	21.3	6.6%
Retailer	15.2	4.7%
Gambling	14.3	4.4%
Consumer Electronics	14.0	4.4%
TOP 10	**283.7**	**88.5%**
TOTAL FOOTBALL	**579.7**	**100%**

Top 10 sponsor categories %age of total football sponsorship



Appendix III: China

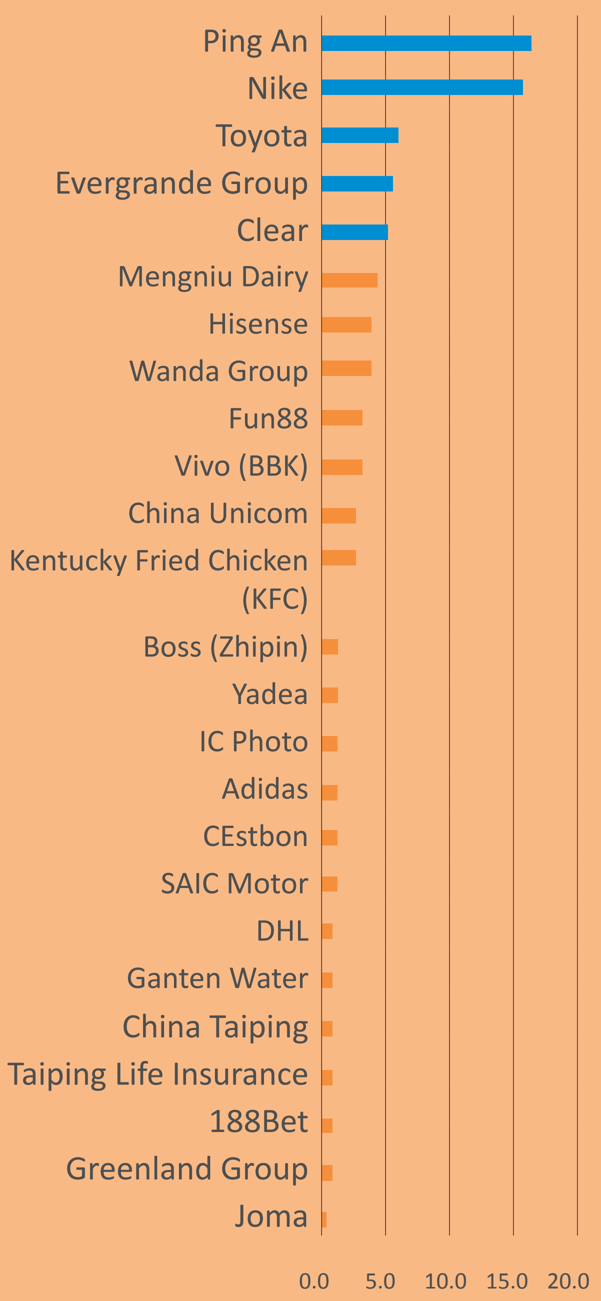
China: top spending brands

Ping An Insurance (US$ 51.7m) and Nike (US$ 48.7m) dominated the brands investing in football in China, together accounting for 31.3% of all football sponsorship. The following eight brands in the rankings accounted for an additional 40.7%. Altogether, 85% of investment came from the top 25 out of a total 126 brands investing.

Football top spending brands 2022 CHINA: (US$ million)

Brands	US$ 000	%
Ping An	51.7	16.1%
Nike	48.7	15.2%
Toyota	20.0	6.2%
Evergrande Group	17.1	5.3%
Clear	16.3	5.1%
Mengniu Dairy	13.4	4.2%
Hisense	11.4	3.6%
Wanda Group	11.1	3.5%
Fun88	10.6	3.3%
Vivo (BBK)	10.5	3.3%
China Unicom	10.0	3.1%
Kentucky Fried Chicken (KFC)	10.0	3.1%
Boss (Zhipin)	5.0	1.6%
Yadea	5.0	1.6%
IC Photo	4.2	1.3%
Adidas	4.1	1.3%
CEstbon	4.0	1.2%
SAIC Motor	3.1	1.0%
DHL	2.4	0.7%
Ganten Water	2.3	0.7%
China Taiping	2.3	0.7%
Taiping Life Insurance	2.1	0.6%
188Bet	2.1	0.6%
Greenland Group	1.8	0.6%
Joma	1.8	0.6%
TOP 25 BRANDS	**270.9**	**84.5%**
TOTAL FOOTBALL	**320.5**	**100%**

Top 25 spending brands %age of the total football sponsorship in 2022

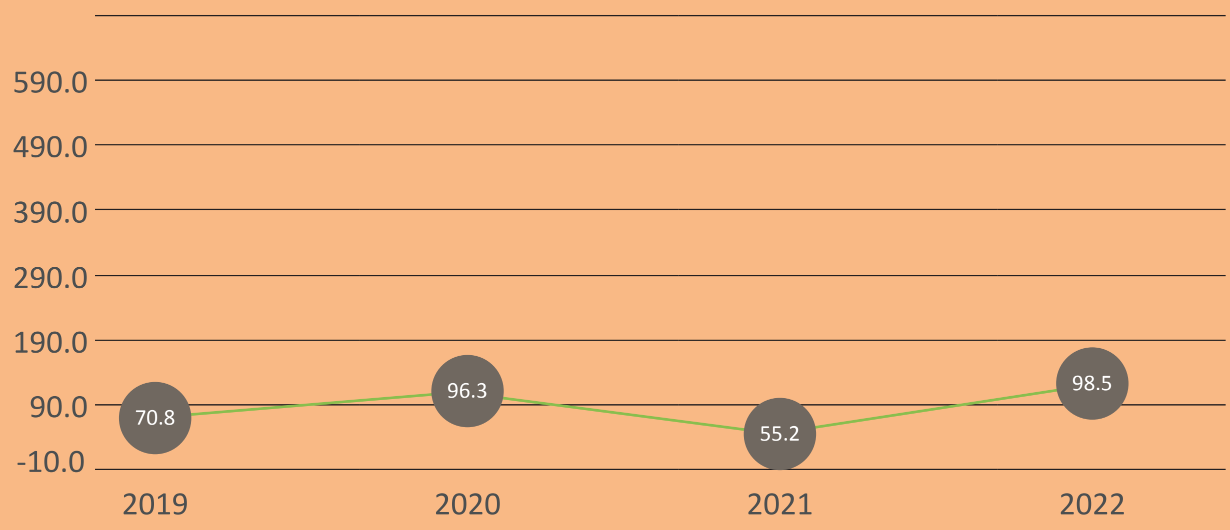


Appendix IV: South Korea

South Korea: overview

South Korea's encouraging football sponsorship growth over 2019 (+39%) saw it pull ahead of Thailand into 4th place. With 25 clubs competing in the K1 and K2 professional leagues, and a further 16 in the K3 semi-professional league, football is currently the most popular sport in South Korea and was ranked 25th in the FIFA world rankings in 2022.

Football sponsorship in South Korea 2019 - 2022 (US$ million)



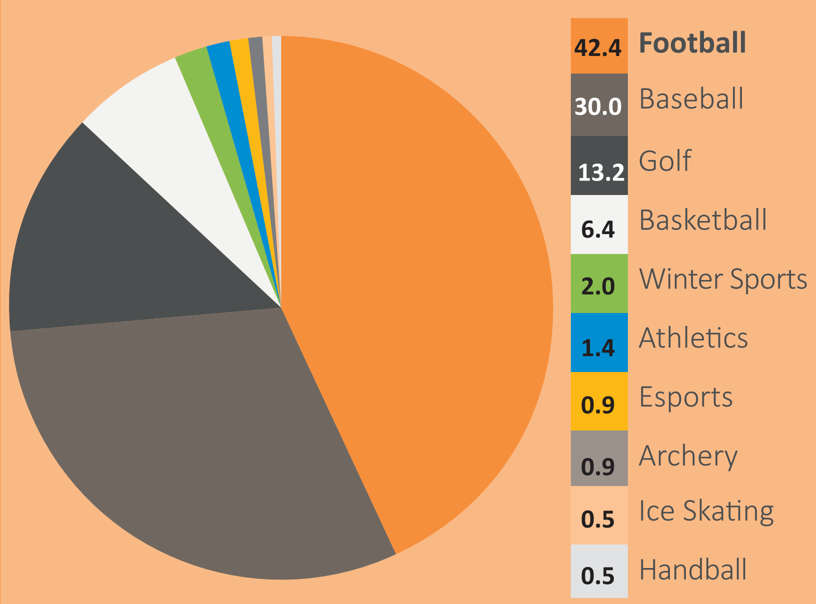
South Korea: sponsorship platforms

Football led the sport sponsorship field in South Korea, with 42.4% of all sport sponsorship. It was followed closely by baseball (30.0%) and together these two platforms accounted for 72.5% of total sport sponsorship value. Led by golf, the remaining eight platforms made up 25.9% of the total.

Top 10 sports platforms 2022 SOUTH KOREA: (US$ million)

Platform	US$	%
Football	**98.5**	**42.4%**
Baseball	69.7	30.0%
Golf	30.6	13.2%
Basketball	14.9	6.4%
Winter Sports	4.7	2.0%
Athletics	3.2	1.4%
Esports	2.2	0.9%
Archery	2.1	0.9%
Ice Skating	1.2	0.5%
Handball	1.1	0.5%
TOP 10	**228.3**	**98.3%**
TOTAL SPORTS	**232.3**	**100%**

Top 10 sponsorship platforms % of total sport sponsorship



Appendix IV: South Korea

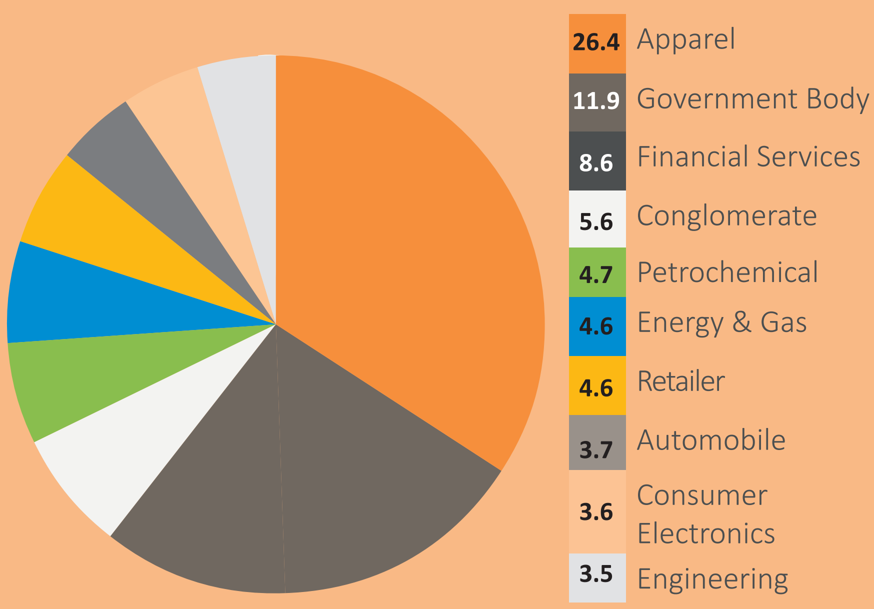
South Korea: top sponsor categories

The top 10 sponsor categories accounted for 77.2% of total football sponsorship investment, with apparel and financial services both in the top three. A 'newcomer' (in this report) near the top of the rankings was 'government body'. This US$ 11.7m (11.9% of the total) derived almost exclusively from local/provincial government support of K League clubs, demonstrating how government continues to support the growth of football in South Korea.

Football sponsor categories 2022 SOUTH KOREA: (US$ million)

Category	US$	%
Apparel	26.0	26.4%
Government Body	11.7	11.9%
Financial Services	8.5	8.6%
Conglomerate	5.5	5.6%
Petrochemical	4.6	4.7%
Energy & Gas	4.6	4.6%
Retailer	4.5	4.6%
Automobile	3.6	3.7%
Consumer Electronics	3.6	3.6%
Engineering	3.5	3.5%
TOP 10	**76.0**	**77.2%**
TOTAL FOOTBALL	**98.5**	**100%**

Top 10 sponsor categories %age of total football sponsorship



Appendix IV: South Korea

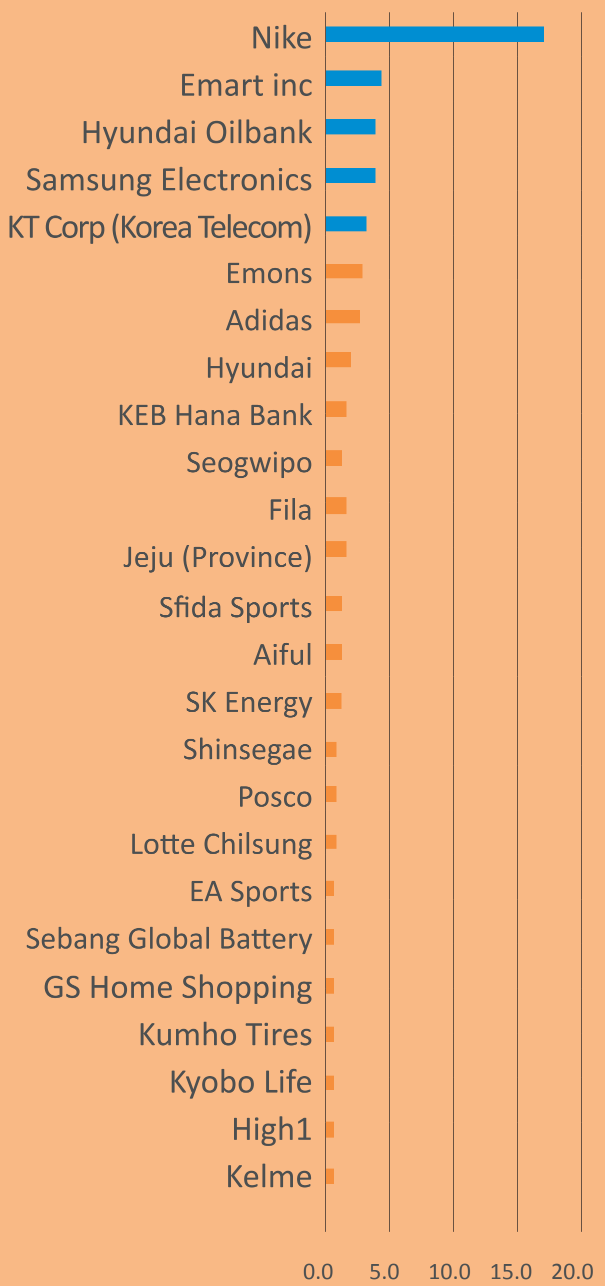
South Korea: top spending brands

With an investment of US$ 17m (17% of total football sponsorship), Nike led the field by a long way, accounting for two thirds of the apparel category investment; the next ranked brand is retail conglomerate Emart Inc, with US$ 3.9m. 110 brands sponsored football in South Korea, and the top 25 accounted for only 66.9% of total football sponsorship.

Football top spending brands 2022 SOUTH KOREA: (US$ million)

Brands	US$ 000	%
Nike	17.0	17.3%
Emart inc	3.9	3.9%
Hyundai Oilbank	3.6	3.6%
Samsung Electronics	3.6	3.6%
KT Corp (Korea Telecom)	3.1	3.1%
Emons	2.7	2.8%
Adidas	2.7	2.7%
Hyundai	2.4	2.4%
KEB Hana Bank	2.2	2.3%
Seogwipo	2.2	2.2%
Fila	2.2	2.2%
Jeju (Province)	2.2	2.2%
Sfida Sports	2.1	2.1%
Aiful	2.1	2.1%
SK Energy	2.1	2.1%
Shinsegae	1.8	1.8%
Posco	1.5	1.5%
Lotte Chilsung	1.3	1.3%
EA Sports	1.1	1.1%
Sebang Global Battery	1.1	1.1%
GS Home Shopping	1.1	1.1%
Kumho Tires	1.1	1.1%
Kyobo Life	1.1	1.1%
High1	1.0	1.0%
Kelme	1.0	1.0%
TOP 25 BRANDS	**65.9**	**66.9%**
TOTAL FOOTBALL	**320.5**	**100%**

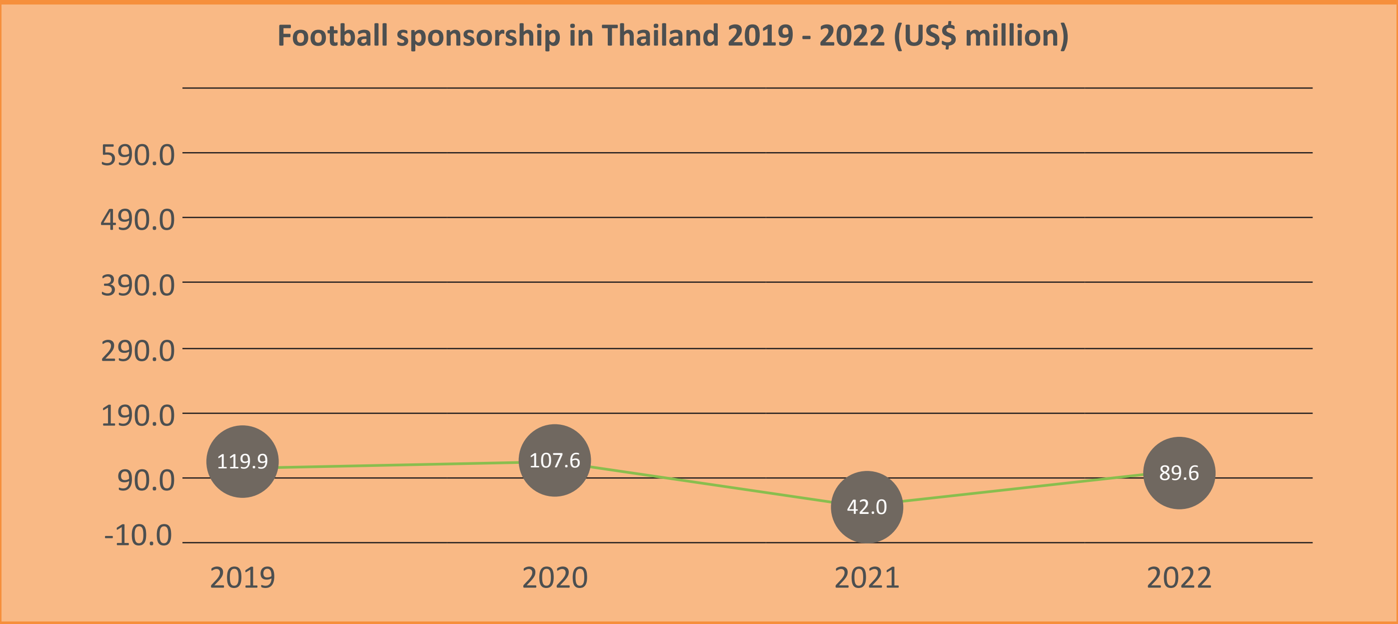
Top 25 spending brands %age of the total football sponsorship in 2022



Appendix V: Thailand

Thailand: overview

2019 saw Thailand ranking 4th for football sponsorship investment, behind Pan-Asia, Japan and China. However, its slow recovery from the pandemic-induced slump, compared to South Korea, saw it slip to 5th in the rankings in 2022 at -25% compared with the 2019 value.

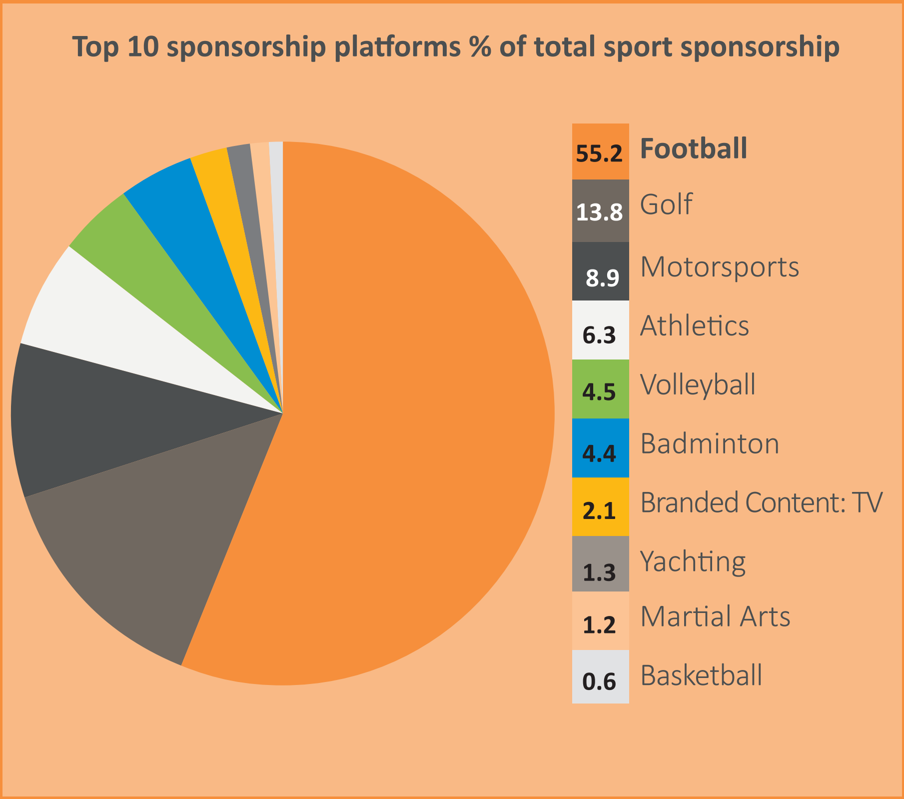


Thailand: sponsorship platforms

At US$ 89.6m football accounted for a massive 55.2% of all sport sponsorship in Thailand. Next in the rankings, with 13.8%, was golf. 98.3% of all sport sponsorship was derived from the top 10 platforms.

Top 10 sports platforms 2022 THAILAND: (US$ million)

Platform	US$	%
Football	**89.6**	**55.2%**
Golf	22.4	13.8%
Motorsports	14.5	8.9%
Athletics	10.2	6.3%
Volleyball	7.3	4.5%
Badminton	7.1	4.4%
Branded Content: TV	3.4	2.1%
Yachting	2.1	1.3%
Martial Arts	2.0	1.2%
Basketball	1.0	0.6%
TOP 10	**159.5**	**98.3%**
TOTAL SPORTS	**162.3**	**100%**



Appendix V: Thailand

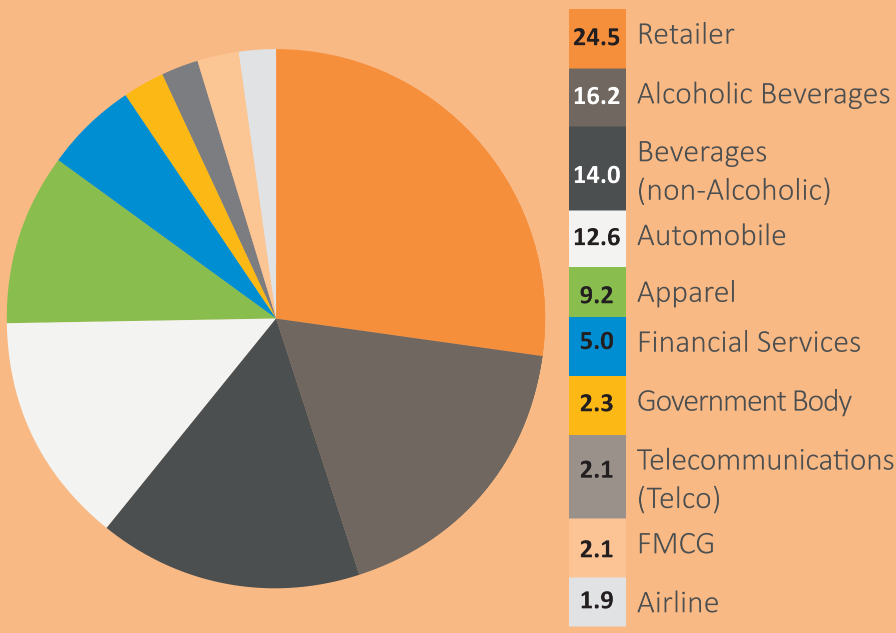
Thailand: top sponsor categories

Retail, at US$ 21.9m (24.5%) topped the rankings in Thailand largely due to investment by duty free giant, King Power, in Leicester City FC. Beverages, both alcoholic and non-alcoholic accounted for 30.2% of total football spend with automobile also featuring strongly at 12.6%. The top 10 categories accounted for 89.8% of total football spending.

Football sponsor categories 2022 THAILAND: (US$ million)

Category	US$	%
Retailer	21.9	24.5%
Alcoholic Beverages	14.5	16.2%
Beverages (non-Alcoholic)	12.6	14.0%
Automobile	11.3	12.6%
Apparel	8.2	9.2%
Financial Services	4.5	5.0%
Government Body	2.1	2.3%
Telecommunications (Telco)	1.9	2.1%
FMCG	1.8	2.1%
Airline	1.7	1.9%
TOP 10	**80.5**	**89.8%**
TOTAL FOOTBALL	**89.6**	**100%**

Top 10 sponsor categories %age of total football sponsorship



Appendix V: Thailand

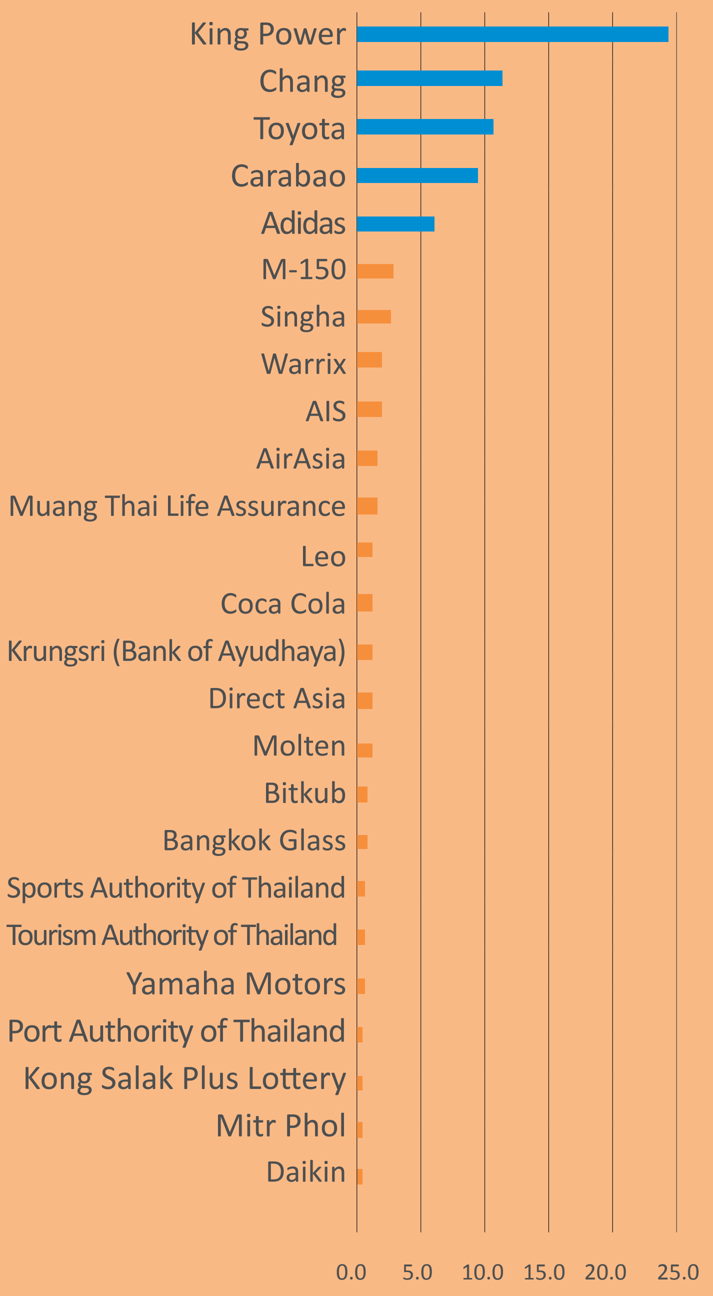
Thailand: top spending brands

King Power topped the big spenders with US$ 20.9m, followed by Chang (beer) – taking the lion's share of the alcoholic drinks category. For the first time (in this report), an automobile sponsor is included in the top five with Toyota in the No. 3 spot. Almost 90% of investment in the non-alcoholic drinks category came from Carabao and M-150, 'energy' drinks.

Football top spending brands 2022 THAILAND: (US$ million)

Brands	US$ 000	%
King Power	20.9	23.4%
Chang	10.7	12.0%
Toyota	9.8	11.0%
Carabao	8.1	9.0%
Adidas	5.5	6.2%
M-150	2.9	3.2%
Singha	2.5	2.7%
Warrix	1.8	2.0%
AIS	1.8	2.0%
AirAsia	1.5	1.7%
Muang Thai Life Assurance	1.4	1.5%
Leo	1.3	1.4%
Coca Cola	1.3	1.4%
Krungsri (Bank of Ayudhaya)	1.2	1.4%
Direct Asia	1.2	1.4%
Molten	1.1	1.3%
Bitkub	1.1	1.3%
Bangkok Glass	1.1	1.2%
Sports Authority of Thailand	1.0	1.1%
Tourism Authority of Thailand	1.0	1.1%
Yamaha Motors	0.8	0.9%
Port Authority of Thailand	0.6	0.7%
Kong Salak Plus Lottery	0.6	0.7%
Mitr Phol	0.6	0.7%
Daikin	0.5	0.6%
TOP 25 BRANDS	**80.5**	**89.8%**
TOTAL FOOTBALL	**89.6**	**100%**

Top 25 spending brands %age of the total football sponsorship in 2022



Asia Sponsorship News Co., Ltd.

Created by media professionals with decades of experience, Asia Sponsorship News (ASN) is the leading news and intelligence resource for the sponsorship industry in Asia.

Frustrated by the lack of insights into the multi-billion dollar sponsorship industry in Asia, ASN was created by a group of media professionals with decades of experience in the fields of media, marketing, analysis and sponsorship.

Over the past 15+ years, the ASN Index has tracked over US$150 billion sponsorship spend in Asia and over 270,000 sponsorship deals in the region. Over the years there has been a clear trend that sponsorship spend is increasing faster than traditional media spend, as brands realise the benefits of engaging fans through sponsorship and brand partnership marketing.

ASN offers weekly newsletters with the latest news about sponsorship deals in Asia as well as insight into the articles and wider industry perspective. There is also a rights holder directory with more than 2,000 rights holder contact details. ASN also offers more customised services such as consulting, reports, lead generation, training and rights evaluation.

The Premium Tools section of the ASN website features the core analytics dashboard with deals listing and brand directory. An elaborate search engine allows Premium subscribers to use these tools to help drive sales and generate leads. In practice, a European football team may source an appropriate sponsor for a specific right using the ASN Index and its sophisticated search tool.

The ASN Index tracks more than US$ 10 billion of sponsorship deals in Asia annually, 60 percent of which fall in the sports category.

We encourage everyone to go to asiasponsorshipnews.com to browse the site and explore all the tools and services.

ASN is operated by Asia Sponsorship News Co., Ltd. a subsidiary of Paul Poole (South East Asia) Co., Ltd.

www.asiasponsorshipnews.com / info@asiasponsorshipnews.com

About Paul Poole (South East Asia) Co., Ltd.

Founded in 2004 by veteran international marketing consultant Paul Poole, Paul Poole (South East Asia) Co., Ltd. is an independent marketing consultancy based in Bangkok, Thailand specialising in commercial sponsorship and partnership marketing, working with both rights holders and brands - acting as a catalyst by bringing them together and maximising the relationship.

The consultancy has packaged, sold and managed sponsorship and partnership opportunities for a wide range of rights holders and worked with many of the world's leading brands to source and engage the right sponsorships and partnerships for them to maximise.

www.paulpoole.co.th / info@paulpoole.co.th