

taylor

EMERGING SPACES IN SPORTS

AUGUST 2026



The Tension

BY THE TIME A SPORT IS “SAFE,” THE OPPORTUNITY HAS PASSED.

The biggest openings in sports are the ones nobody is bidding on yet.



WAITING FOR PERMISSION AND PROOF MEANS OVERPAYING



COST OF ENTRY

Rights and IP costs climb annually, pricing out brands before an emerging sport is deemed “safe”



CROWDED ROSTERS

The stakes are higher, with brands at risk of becoming a logo in the sea - competing for both category and spend



LIMITED CUSTOMIZATION

Traditional sports rely on pre-set packages, grouping sponsors by tier with little room to shape experience around your brand

The Shift

ATTENTION AND GROWTH ARE MOVING TOWARD

FAST-RISING, CULTURE-FORWARD,
NICHE SPACES THAT BIG-LEAGUE
BUDGETS AREN'T BUILT AROUND YET.

172%

Growth in pickleball players in
last 3 years, continuing to
outpace every other sport¹

VALIDATION

Olympics, new
championships,
streaming deals

DISCOVERY

Streaming and
Social

DIVERSITY

Demographic
Diversity

(1) [SFIA](#)

The Shift

THE NUMBERS ARE ALREADY PICKING UP. THE MONEY'S NEXT.

24.3M

Americans played
pickleball in 2025

+135%

Increase in F1
audience growth since
2018

91st

Women's wrestling —
newest NCAA
championship sport

650K

Viewers tuned into the
Fanatics Flag Football
classic with
momentum going into
LA28

(1) [SFIA](#) (2) [ESPN](#) (3) [NCAA](#) (4) [SBJ](#)



The Opportunity

“EMERGING” ISN'T UNTESTED. IT'S UNCLAIMED.

The biggest openings in sports are the ones nobody is bidding on yet.

OUR PLAYBOOK

#1

**SPOT THE SPACE,
DON'T CHASE THE CROWD**

First-mover equity beats late-mover spend.

#2

**INVEST IN THE SPACE
AROUND THE SPORT**

Grow the sport and you grow with it.

#3

**NICHE AUDIENCES
WITH ACTION**

Emerging spaces reach different fans — not fewer.

#4

**OWN THE CATEGORY,
NOT JUST A PLACEMENT**

Be the brand fans name first — not one of hundreds.

Play 1

SPOT THE SPACE, DON'T CHASE THE CROWD

First-mover equity beats late-mover spend.

Play 1

HOW TO READ THE FIELD BEFORE THE PLAY

MOMENTUM

Has participation or viewership risen sharply?

SPARK

Is there an upcoming championship, league announcement, etc.?

DISTINCT AUDIENCE

Is this reaching previously untapped consumers?

WHITESPACE

How many other brands have already planted a flag?

Why it matters? YOU CAN'T BUY LOYALTY

Play 1: Momentum

THE BOARD IS SET. WHAT'S THE NEXT MOVE?

250M

[Chess.com](#) users, more than double its user base from late 2022

The World Chess Championships land broadcast spots across YouTube, Twitch, Kick, and Facebook Gaming in over 100 countries.

Players like Magnus Carlsen are putting their stamp on pop culture; his Esports World Cup Global Ambassador Role alongside Cristiano Ronaldo² solidifies his influence.

Chess is no longer just a hobby; it quietly built a major audience in the esports space. While individual players have secured sponsorships, classic consumer categories (e.g., food and bev, auto) have been slow to show.

(1) [Chess.com](#). (2) [Esports World Cup](#)



PRE-OLYMPIC PLAYS

HIGHTOWER X US SQUASH

Signed the largest sponsorship commitment in the organization's history¹.

NFL X FLAG FOOTBALL

Unveiled plans for a pro flag football league backed by NFL clubs and athlete-investors like Tom Brady, Peyton Manning, Serena Williams, and Alex Morgan².

SHARED VALIDATION IN LA28

Squash and flag football haven't proven themselves to a mainstream audience yet. By betting on the validation before it happens, brands secure a seat at the table vs. standing room only.

(1) [Hightower Advisors](#) (2) [ESPN](#)

Play 1: Audience

STRUCTURED PATHWAYS SUSTAIN SPIKES IN AUDIENCE INTEREST

Girl's flag football participation
(ages 6-12) jumped **283%**
over the past decade¹

Over 40 states are offering girls
high school football programs².



These programs provide an inroad for young women who traditional football structurally excludes, with a clear path from an early start through international competition.

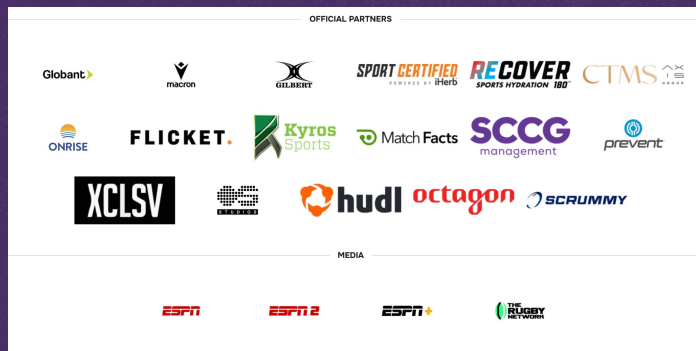
This isn't a small niche. It's a new pipeline of players and fans built around a previously ignored demographic.

⁽¹⁾ USA Football ⁽²⁾ NFL Flag

Play 1: Whitespace

WHOEVER IS FIRST IN LINE CAN HELP WRITE THE RULES

The years before a World Cup are the tipping point of when a sponsor map is still open...and when it starts to close.



The rare gap...

No major U.S. consumer brand
has claimed the league yet.

The US is set to host the Rugby World Cup in 2031 and 2033, but Major League Rugby's current sponsors are small and category-specific

Play 2

INVEST IN THE SPACE AROUND THE SPORT

Emerging spaces reach different fans — not fewer.

Play 2

FOSTER GROWTH BEYOND SPONSORSHIP

GRASSROOTS GROWTH

Why invest in youth,
women's and
community programs?

NEW ARENAS

How can brands help
create the stages
non-traditional sports
need?

EXPOSURE

Are you creating
visibility for the sport,
or just borrowing the
spotlight?

Why it matters? INVESTMENT OUTSIDE OF PR/SOCIAL

Play 2: Grassroots Growth

FUND THE FANBASE

Premier Lacrosse League closed a \$100M Series E financing round this past June, with a dedicated investment in broadening access to youth lacrosse⁽¹⁾.

With ground-up growth as a key driver for the league, US Bank took the opportunity to become official partner of PLL Assists, the league's charitable/youth arm.

That commitment came bundled with tangible returns: title sponsor of Championship Weekend, and founding partner of two brand-new expansion franchises.

Funding the grassroots level isn't just goodwill. It's what distinguishes a sponsor from a partner - becoming part of the story beyond spend.

(1) [Premier Lacrosse League](#)



INVEST IN THE INFRASTRUCTURE

Cricket is one of the world's most-watched sports. However, fandom in the US has lagged behind.

For Major League Cricket's first 3 seasons in the US, they operated without home venues. Now in its 4th season, the league is planning 10 international grounds across the US by 2030⁽¹⁾.

This isn't a broadcast deal or a content play. It's ground being broken before the sport has the audience most leagues wait for.

(1) [Major League Cricket](#)



Play 2: Exposure

EXPOSURE IS EARNED, AND AUDIENCE IMPACT IS RECIPROCAL

Ally hit its 50/50 pledge for equal spend on men's and women's sports media a full year ahead of projections¹.

This marks the first brand to set and publicly achieve a time-bound gender equity pledge in sports media.

Along the way

A horizontal timeline arrow pointing to the right, with four circular markers at regular intervals.

Helped get 2022 NWSL championship a primetime broadcast spot on CBS

Finalized a multimillion-dollar, one-year deal with Disney Advertising and ESPN allocating 90% of the investment to women's sports coverage in 2023

Became a founding partner of Unrivaled (2024), the WNBA's official banking partner

Helped deliver the PWWL's first-ever nationally televised game in March 2026

As a result, Ally's brand valuation grew 40% over the pledge period, and women made up 65% of customers² by 2023.

(1) [Ally Bank](#) (2) [AdWeek](#)

Play 3

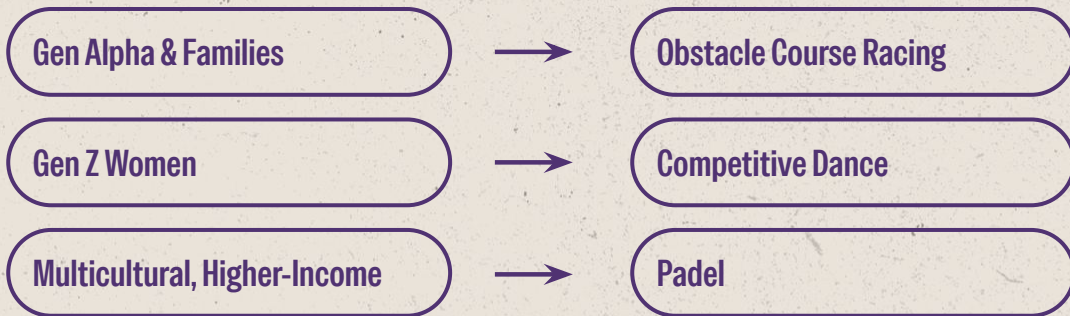
NICHE AUDIENCES WITH ACTION

Emerging spaces reach different fans — not fewer.

Play 3

FOSTER GROWTH BEYOND SPONSORSHIP

The prize of emerging spaces is reach into audiences legacy properties under-index on:



Strength vs Size

Play 3: Gen Alpha and Families

**Sponsorship dollars
can reach multiple
generations within
the same household -
don't have to pay 3
times to reach 3
audiences**

Age divisions at Ultimate Ninja Athlete Association competitions start at 6 and under, with a growing 40+ division

Young athletes make up 70% of World Ninja League participants¹

Parents aren't just watching from the sidelines, they're competing on the same course structure as their kids in the same event weekend² - a true multi-generational run.

(1) [ABC News](#) (2) [Spectrum News](#)

Play 3: Gen Z Women

DANCE ALREADY HAD INHERENT CULTURAL REACH, THE LEAGUE STRUCTURE GAVE IT LEGS FOR POTENTIAL PARTNERSHIPS

FORMAL LEAGUE

The International Dance League's 2025 launch event generated 100 million views in 10 days and a sold-out venue of 2,000+ attendees¹

- 68% of their audience is women aged 18-34¹ - a dynamic, hard-to-buy audience.

As a founding partner of the 2026 season, e.l.f. cast a wide net with immersive experiences, streaming partnerships, and dance integration across its other sports, entertainment, and music platforms.

- IDL made its NWSL debut at the 2026 NWSL Challenge Cup, where pro dancers led a live fan dance-along and the Match Day Dance Cam²

ORGANIC AUDIENCE

Dance is the 2nd biggest category on TikTok, with >181 Billion hashtag views

(1) [e.l.f. Beauty](#) (2) [e.l.f. Beauty](#)

Play 3: Multicultural, Higher Income

CATEGORY POSITIONING CAN DO THE WORK FOR YOU

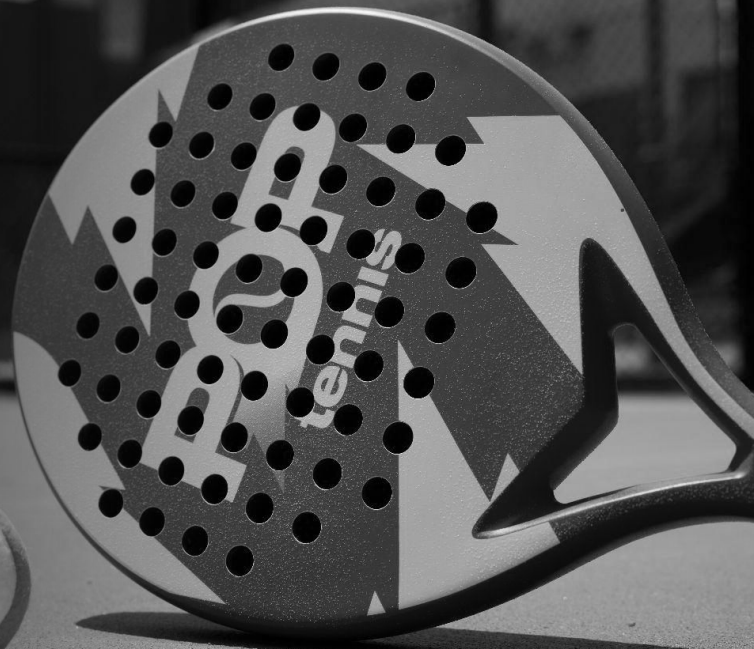
Racket sport Padel's popularity is concentrated in Hispanic geographics, particularly Spain and Argentina

- While there were less than 30 Padel courts in the US in 2020, the U.S. Padel Association projects that number to rise to 20K by 2030¹.

The Hispanic audience presents a major opportunity in the US, representing 25% of Gen Z² and 20% of high-earning Gen Zers³.

Padel is explicitly building as a premium, private-club, hospitality-linked sport in the U.S. - not mass-market like pickleball, capitalizing on the cross-section.

(1) [Sportico](#) (2) [AECE](#) (3) [Ipsos](#)



Play 4

OWN THE CATEGORY, NOT JUST A PLACEMENT

Be the brand fans name first — not one of hundreds.



Play 4

FOSTER GROWTH BEYOND SPONSORSHIP

CLAIM A CORNER

How do you find a lane
within the league?

BYOA

How can you bring
your own assets to the
partnership?

STAY THE COURSE

Consistency beats
spend with the
consumer - how do
you keep showing up?

Why it matters? Visibility dies when the placement ends. Continued association helps make the presence more permanent.

Play 4: Claim a Corner

A DEFINED, EXCLUSIVE LANE IS EASIER TO HOLD AND HARDER FOR A COMPETITOR TO TAKE

Liquid Death didn't try to outbid legacy competitors for "official water" or "official soda" rights - those spots have been locked for decades.

Instead, it went in on the unclaimed categories: NASCAR's first-ever "Official Iced Tea Sponsor," the Philadelphia Eagles "Official Iced Tea Partner," and LAFC's "exclusive flavoured sparkling water partner"

Its own exec put it plainly: big brands "have locked up [beverage sponsorships] across the board for years and years... but we're starting to see great opportunities for other brands to come in."⁽¹⁾

Bottom Line: You don't need to out-spend to out-earn

(1) [Marketing Brew](#)



Play 4: BYOA

BRINGING AN OWNED RETAIL ASSET INTO THE LEAGUE TURNS A SPONSORSHIP INTO SOMETHING FANS ACTUALLY USE

Walmart's new MLS partnership built a dedicated soccer shopping hub and original programming around Saturday matches, timed to the U.S.-hosted 2026 World Cup⁽¹⁾

Soccer Hub



Exclusive merchandise
and watch-party essentials

(1) [League's Cup](#)

Play 4: Stay the Course

DON'T JUST BUY ONE PLACEMENT AND PAY THE FEE.

Investment means adding more of your own portfolio, not just spend, into sponsorship properties over time

July 2023

P&G's Mielle became the WNBA's first-ever Official Textured Hair Care Partner

April 2026

P&G expanded into a multi-year, multi-brand deal with Secret, Olay, Tampax, Downy, Gillette Venus, and Tide, each activating separately around the league

July 2026

Secret and Olay launched products co-designed with A'ja Wilson and Paige Bueckers

Tampax became Official Period Care Sponsor, headlining the 2026 WNBA Draft's "Queens Court" activation

**DON'T WAIT FOR CERTAINTY.
PLANT A FLAG WHILE THE
GROUND IS STILL FRESH AND
LET THE AUDIENCE GROW UP
AROUND YOU.**

The New Playbook

YOUR REPLAY

01

SPOT IT EARLY

02

GROW WITH IT

03

WIN A NEW AUDIENCE

04

OWN THE CATEGORY