

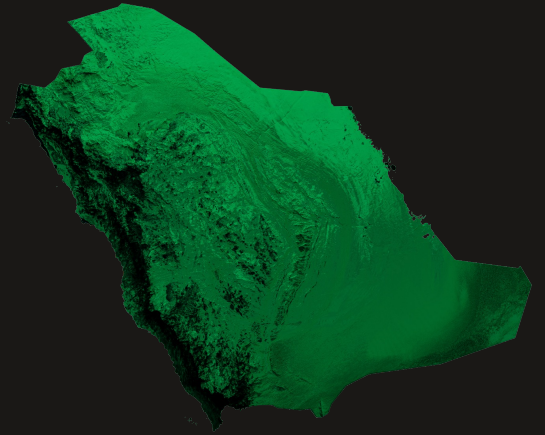
THE NEW WAVE OF SAUDI SPONSORSHIP

How evolving consumer passions, new platforms and changing expectations are reshaping the sponsorship opportunity in Saudi Arabia



THE BIG PICTURE

SAUDI ARABIA REMAINS ONE OF THE WORLD'S MOST RECEPTIVE MARKETS FOR SPONSORSHIP



" The next wave of sponsorship investment will involve more brands across a wider range of platforms "

72%

More likely to purchase from a brand that sponsors something they care about

78%

Feel more positive towards a sponsor of something they are interested in rather than a brand using traditional advertising

82%

Believe they see more sponsorship activity in Saudi Arabia than five years ago

Sponsorship has been embedded in Saudi Arabia's consumer landscape. **But as the market matures, the opportunity is changing.**



Football remains the dominant sporting platform, while rapidly expanding audiences across entertainment, culture and emerging sports are creating a broader and increasingly sophisticated sponsorship ecosystem.

THE PASSION ECONOMY IS EXPANDING



FOOTBALL STILL LEADS, BUT THE COMPETITION FOR CONSUMER PASSION IS INTENSIFYING

Football remains an extraordinary platform for brands, with around **15.3 million** Saudi adults highly interested in the Saudi Pro League. But it now sits within a much broader passion economy. Theme parks, music and cultural events each represent audiences of more than 10 million.

The direction of travel is equally important. Interest in music has increased by 6 points since 2025, music festivals and concerts by 6 points, while professional sport overall has risen by 12 points.

SAUDI PRO LEAGUE	15.3M
THEME PARKS	13.2M
MUSIC	12.5M
PROFESSIONAL SPORTS	11.1M
CULTURAL EVENTS	10.4M
ESPORTS & GAMING	8.8M

" The opportunity is no longer about choosing between football and everything else. It is about understanding which passion point best serves the brand's audience and objectives. "

Q. How interested are you in the following professional sports & events? This could be watching on television, streaming online, attending or following in the news. This does not include participation.

*Estimated number of Saudi adults with high interest – potential addressable sponsorship audience
N=1,003 adults 18+

THE NEXT WAVE OF SPORTS

SPORTS OTHER THAN FOOTBALL ARE PROVING THEY CAN DELIVER CUT-THROUGH FOR SPONSORS

Formula One and esports have emerged as the strongest sponsorship environments outside football, while tennis, golf and other sporting platforms are also generating meaningful sponsor recognition.



47%

Aramco x Aston Martin F1



49%

STC x Esports World Cup

This matters because it demonstrates that brands no longer need football-sized properties to achieve meaningful consumer cut-through.

As Saudi Arabia's sporting ecosystem expands, a wider range of platforms can now play distinct roles within a sponsorship portfolio.

38%

ROSHN x LIV Golf



THE OPPORTUNITY EXTENDS BEYOND SPORT

ENTERTAINMENT AND CULTURE ARE BECOMING SERIOUS SPONSORSHIP PLATFORMS



1 IN 3+

Saudi adults recognise leading sponsorships across a growing range of entertainment and cultural properties

+50%

Awareness achieved by the leading Riyadh Season sponsorships – providing a benchmark for the wider entertainment landscape



**RIYADH
SEASON**
Big Time!

Recognition above one in three demonstrates that meaningful sponsor awareness can now be achieved across a much wider entertainment and cultural landscape, not only through the Kingdom's largest properties.

THE NEXT WAVE OF SPONSORSHIP WILL HAVE MORE PLACES TO PLAY



As Saudi Arabia's entertainment and cultural calendar expands, brands have an increasingly diverse range of credible platforms through which to build sponsorship strategies beyond traditional sport.

CONSUMER EXPECTATION IS CHANGING

ACQUIRING THE RIGHTS IS ONLY THE BEGINNING

79%

feel more positive towards a sponsor that **interacts with them** rather than simply showing its branding

78%

Prefer sponsorship **tailored to their interests**

01

77%

Say **long-term sponsorship** feels more authentic

02

70%

Say sponsorship can **influence purchasing decisions**

03

WHY IT MATTERS

As sponsorship supply expands, simply being present will become less differentiating. Saudi consumers increasingly expect brands to **add value, interact with them** and **demonstrate a genuine connection** to the properties and passions they sponsor.

THE TAKEAWAY

SPONSORSHIP SUCCESS WILL INCREASINGLY DEPEND ON ACTIVATION, NOT JUST EXPOSURE.



THE NEXT BIG COMMERCIAL FRONTIER

NAMING RIGHTS ARE REACHING AN INFLECTION POINT

**64%**

Support sponsor naming of theatre / arts venues
(+11 pts compared to 2025)

62%

Support sponsor naming of music / entertainment venues
(+8 pts compared to 2025)

61%

Support sponsor naming of new sports stadiums
(+9 pts compared to 2025)

With a new generation of stadiums and entertainment venues in development, growing consumer acceptance could unlock one of the Kingdom's next major sponsorship categories.

Acceptance is not unconditional. Renaming existing sports stadiums remains more sensitive, reinforcing the importance of heritage, brand fit and fan value when structuring naming rights sponsorships.

WHAT COMES NEXT

OPPORTUNITIES IN THIS NEW WAVE WILL BE BROADER, INVESTMENTS WILL BE MORE STRATEGIC

THE NEXT CHAPTER

The next chapter of Saudi sponsorship is likely to look different from the last. As the initial wave of football-led investment broadens.

WHAT IS CHANGING

New venues, entertainment platforms and participation properties are creating opportunities for a wider range of brands and sectors to enter the market.

1

A BROADER BASE OF BRANDS WILL ENTER THE SPONSORSHIP MARKET

As competition to reach Saudi Arabia's young adult population intensifies, sectors including banking, real estate, automotive and technology will increasingly use sponsorship to drive awareness and differentiation.

2

NEW VENUES WILL CREATE NEW PREMIUM INVENTORY

The development of stadiums, arenas and entertainment destinations, combined with growing naming-rights acceptance, has the potential to create a new generation of benchmark sponsorships.

3

INVESTMENT IN ENTERTAINMENT AND PARTICIPATION WILL GROW

As consumer interests continue to diversify, a higher portion of the next wave of investment will flow into entertainment and participation-led properties.

4

BRAND FIT WILL MATTER MORE AS THE MARKET BROADENS

While some sectors, particularly tourism, airlines and telecoms, have broad permission to play across the sponsorship landscape, consumers do distinguish between categories. Culture, for example, has a much stronger association with government and destination sponsors than sport or entertainment.

WANT TO KNOW MORE?

THE SAUDI SPONSORSHIP MONITOR 2026

Tracking the evolution of one of the world's most dynamic sponsorship markets

Following the success of our inaugural Sponsorship Landscape Study in 2025, Elevate has conducted additional research to understand how sponsorship behaviours, attitudes, and brand perceptions continue to evolve across the Kingdom.

1,003
SAUDI ADULTS

NATIONAL
NATIONALLY REPRESENTATIVE

JUL 2026
FIELDWORK JULY 2026

THE FULL MONITOR EXPLORES:

- | | |
|---|--|
| 01 Sponsorship attitudes and purchase influence | 02 Activation preferences |
| 03 Industry and category fit | 04 Consumer passion points and audience profiles |
| 05 Naming-rights sentiment | 06 Sponsor and property awareness |
| 07 Year-on-year movement | |



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WANT TO UNDERSTAND WHAT THE FINDINGS MEAN FOR YOUR BRAND?

To explore the full Saudi Sponsorship Monitor or discuss how Elevate can support your sponsorship strategy and investment decisions, contact our MENA Business Development Team.