



**Global Sports Sponsorships Opportunities, Process, and Management Challenges for
MENA.**

*This case study is for education only and does not suggest any good or bad practice on the part
of anyone mentioned in the case study.*

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ABSTRACT

To examining and identifies global sports sponsorships opportunities, brand partnership development, and future business perceptions using recent global sponsorship and FIFA World Cup research. The result will be a more informative understanding of the sports sponsorships business between multiple international, regional, and local businesses for MENA strategic sponsorship planning. Additional convergence is placed on learning what can be applied to upcoming MENA sports events to obtain added values regarding interaction with spectators, products, and national brand recognition. The study further points to significant characteristics for successful integration and processes for a co-marketing partnership. Ultimately, these learnings can apply to the MENA region for future sponsorship opportunities, methods in developing agreements, and measurables comparable to manage sponsorship problem-solving.

LITERATURE REVIEW

Sports Sponsorship Importance:

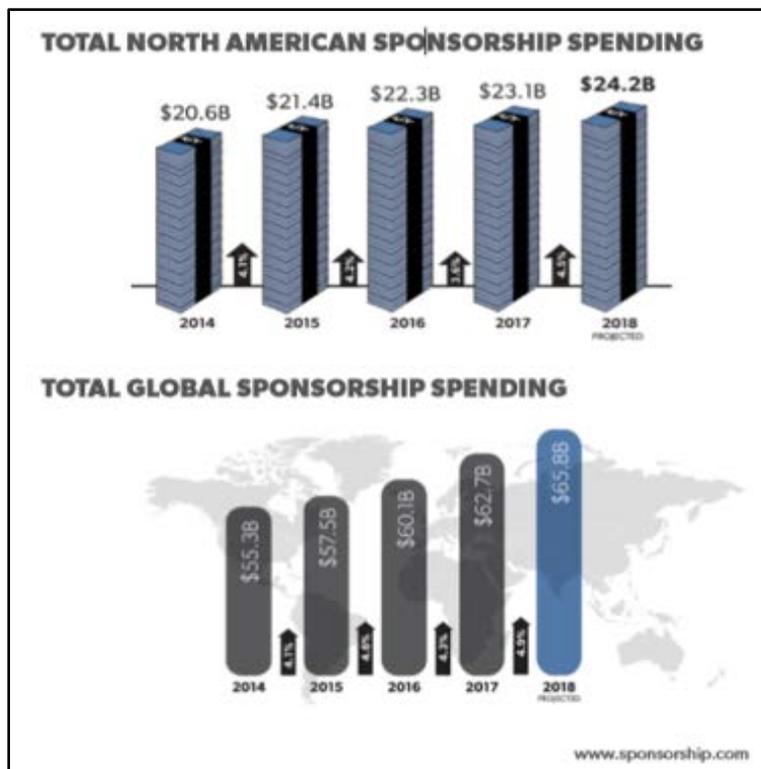
The case study questions to review, why are global sports sponsorships important and how does the FIFA World Cup influence sponsorship? The short answer is, sponsorships can motivate brand behaviors and loyalties of local, regional, and, if intended, global relationships. The long answer is, sports sponsorships benefit the formation and extension of brand message awareness, creating on-going excitement for products and services. FIFA World Cup events have historically produced solid sports sponsorship results through expanded brand awareness through additional media exposure (traditional/digital/social) and audience growth through sponsorship relationships.

As the most significant single sporting event in the world, the popularity of the World Cup is already immense, but the number is still growing every quadrennial. The 2010 World Cup in South Africa reached an audience of 3.2 billion, 46.4 per cent of the global population (FIFA.com, 2011). The FIFA World Cup in Russia, eight years later, drew the world viewers topping 3.4 billion or nearly half of the world population of 7.6 billion (GlobalWebIndex, 2018).

Although media generated more than 3 billion USD, FIFA's sponsorship deals generated 1.65 billion USD, recently mainly from the last-minute deals with Chinese companies. Seven of the 20 premium sponsorship slots for the tournament were Chinese, up from one at the last WC in Brazil. (NYTimes, 2018)

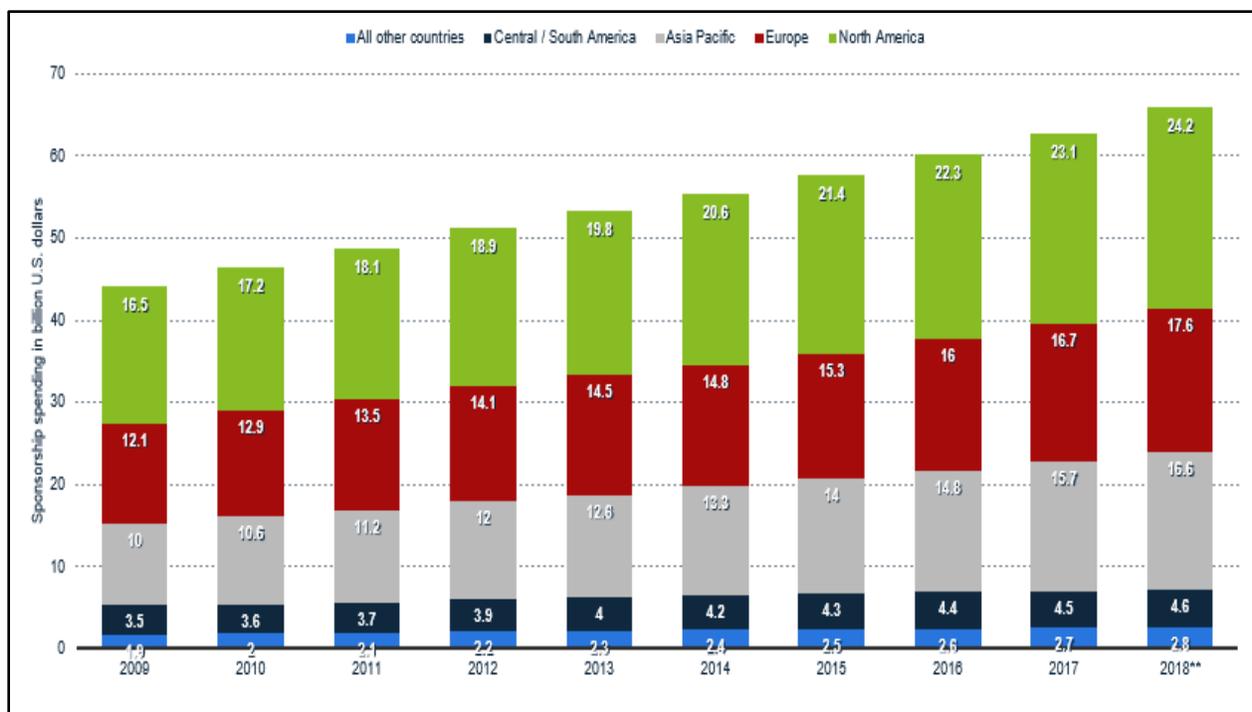
Sports Sponsorship by the Numbers:

A sponsorship is essentially support, either financially or through products and services that an individual or company provides to others. Specific sponsorship categories include sports, entertainment, causes, arts, festivals, fairs and annual events, associations and membership organizations. Global sports sponsorships spending has increased from 37.9 billion USD in 2007 to the projected 65.9 billion USD in 2018. (IEG 2018)



Worldwide; 2007 to 2017 (Source(s): IEG; [ID 196864](#))

The majority of the international sponsorship spending in 2016 came from North America (22.3 USD billion), Europe (16 billion USD) and the Asia Pacific (14.8 billion USD). Note, out of North America's total sponsorships in 2016, only 15.7 billion USD was spent on sports due to athlete demand for higher earnings (mainly through sponsorships).



Spending on sponsorships from 2009 to 2018. (Source: IEG 2018).

Global Sports Brand Businesses in 2017:

Nike was the top sports business brand worldwide in 2017 with a brand value of 29.6 billion USD. (Forbes 2017)

2017 Most Valuable Sports Event Brands Worldwide 2017:

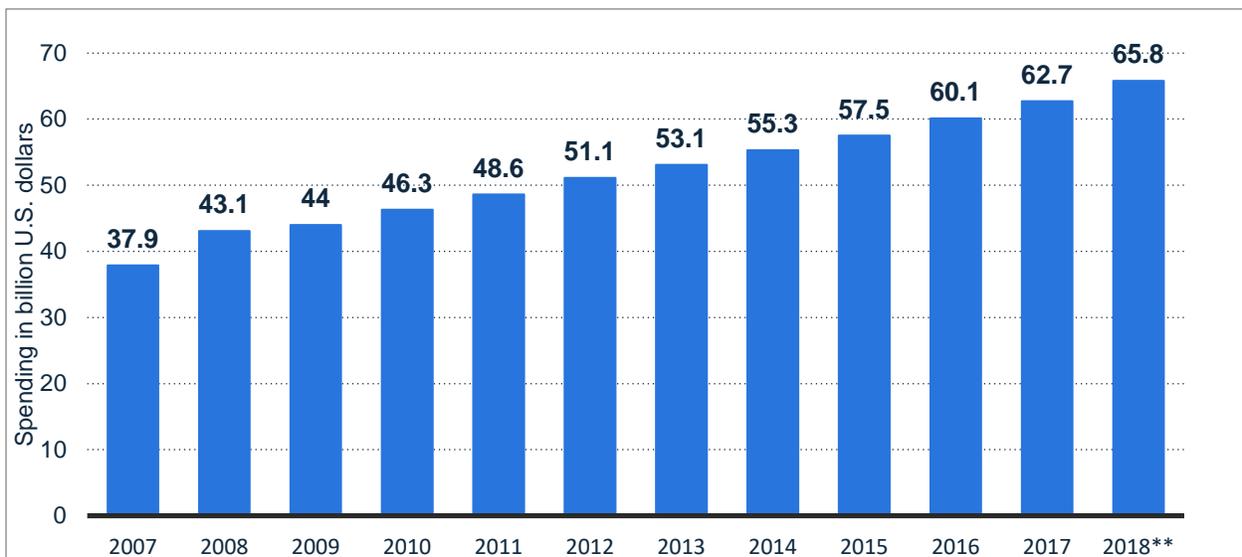
The ranking of international sports events in 2017, according to brand value, that was calculated by Forbes. To date, the Super Bowl is the most valuable sports event brand with an amount of 663 million USD. (Forbes 2017)

Sponsorship Spending On Sports:

In 2018, European sponsorship spending is projected to grow by more than five per cent, still be behind the 5.7 per cent estimated growth in the Asia Pacific region. While still active, Asian Pacific growth is expected to be lower than in 2017 as the marketplace begins to mature.

| GLOBAL SPONSORSHIP SPENDING BY REGION | | | | | |
|--|----------------|----------------|--------------------|-------------------------|------------------------------|
| | 2016 SPENDING | 2017 SPENDING | INCREASE FROM 2016 | 2018 SPENDING Projected | INCREASE FROM 2017 Projected |
| EUROPE | \$16 BILLION | \$16.7 BILLION | 4.5% | \$17.6 BILLION | 5.1% |
| ASIA PACIFIC | \$14.8 BILLION | \$15.7 BILLION | 5.8% | \$16.6 BILLION | 5.7% |
| CENTRAL/SOUTH AMERICA | \$4.4 BILLION | \$4.5 BILLION | 3.4% | \$4.6 BILLION | 3.3% |
| ALL OTHER COUNTRIES | \$2.6 BILLION | \$2.7 BILLION | 3.3% | \$2.8 BILLION | 3.5% |

Global sponsorship spending from 2007 to 2018 (in billion U.S. dollars)



Sponsorship Property Types Change In 2018 (NA Only):

Although relevant data globally is not available, in North America all property types should see meaningfully increases in sponsorship growth in 2018 over 2017. The most significant property, sports, commanded 70 per cent of the market and the highest projected spending increase at 4.9 per cent.

| NORTH AMERICAN SPONSORSHIP SPENDING BY PROPERTY TYPE | | | | | |
|---|----------------|-----------------|--------------------|-------------------------|------------------------------|
| | 2016 SPENDING | 2017 SPENDING | INCREASE FROM 2016 | 2018 SPENDING Projected | INCREASE FROM 2017 Projected |
| SPORTS | \$15.7 BILLION | \$16.26 BILLION | 3.6% | \$17.05 BILLION | 4.9% |
| ENTERTAINMENT | \$2.22 BILLION | \$2.29 BILLION | 3.2% | \$2.4 BILLION | 4.8% |
| CAUSES | \$1.99 BILLION | \$2.05 BILLION | 3.0% | \$2.14 BILLION | 4.4% |
| ARTS | \$962 MILLION | \$993 MILLION | 3.2% | \$1.03 BILLION | 3.7% |
| FESTIVALS, FAIRS AND ANNUAL EVENTS | \$878 MILLION | \$903 MILLION | 2.8% | \$936 MILLION | 3.7% |
| ASSOCIATIONS AND MEMBERSHIP ORGANIZATIONS | \$604 MILLION | \$616 MILLION | 2.0% | \$635 MILLION | 3.1% |

Sponsorship Challenges:

One of the most significant recent challenges for sports sponsorships is knowing who the spectator is. Using technology to measuring, sponsorships can better prepare to capitalize on the values and sponsor relations can be developed: both, pre-event knowledge from the measured history of viewing (traditional/web/social media) for better targeting the local, regional, and global audience interests (or not), plus measuring spectators at the sports events to further animate future live match experiences (What happened during Brazil or Russia World cups?). “Access to richer data will enable more focused sponsor targeting and authentic engagement that will spill outside of the stadium.” (Deloitte 2018)

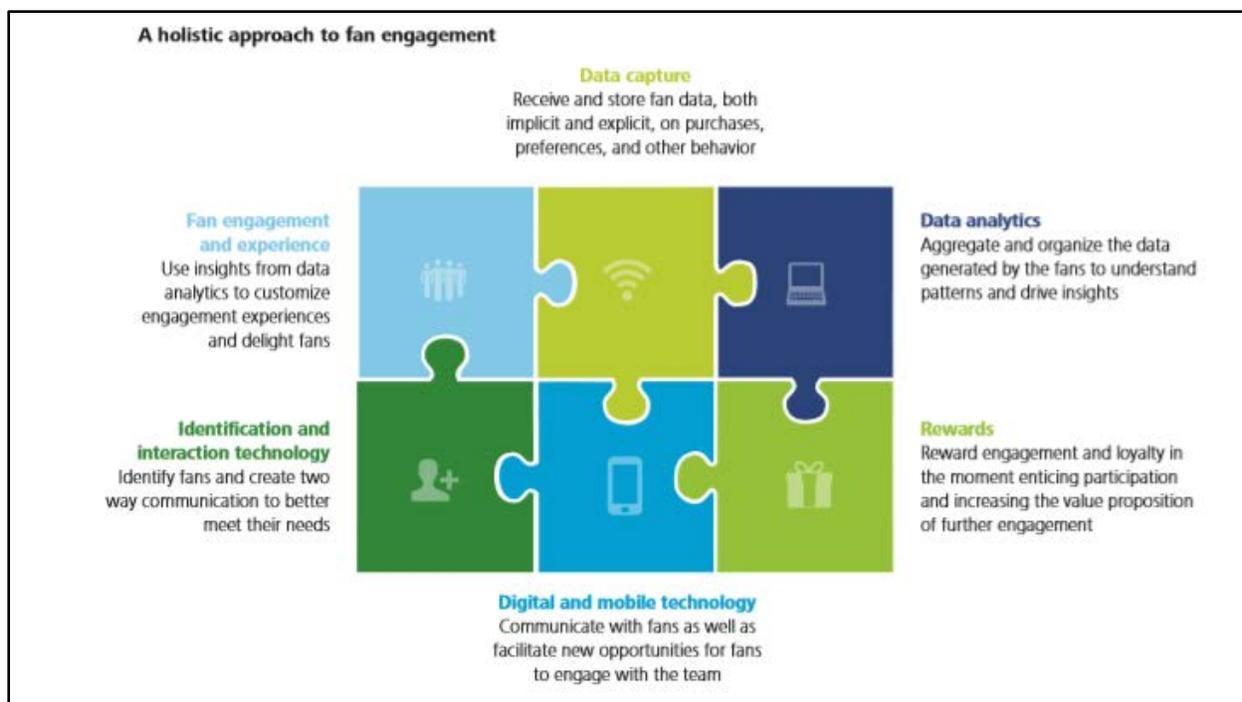
Sponsorship Selection and Engagement:

“It is no longer about enticing spectators to sports events. Customized engagement of distinct groups of fans inside and outside the match venues is needed.” No two World Cups have been alike, which means MENA should be agile in adopting and evolving their sponsorship offerings to address the past learning plus identify new connections to create new and deeper relationships with the audience. For selecting sponsorship: identify the targets, think holistically about the experience, engage early and year-round, and recognize loyalty – make it personal. (Deloitte 2017)

Know the target: To design effective engagement strategies and programs, sponsorships must be precise—and specific—regarding the consumers with whom they seek a relationship. Digging deeper – Going after Millennials spectators: “Based on survey responses, Millennial fans are 20 per cent more likely to be self-defined “fanatics” and 42 per cent more likely to be high-engagement fans than their older Gen X and Boomer counterparts.” (Deloitte 2017)

Think holistically about spectator experiences:

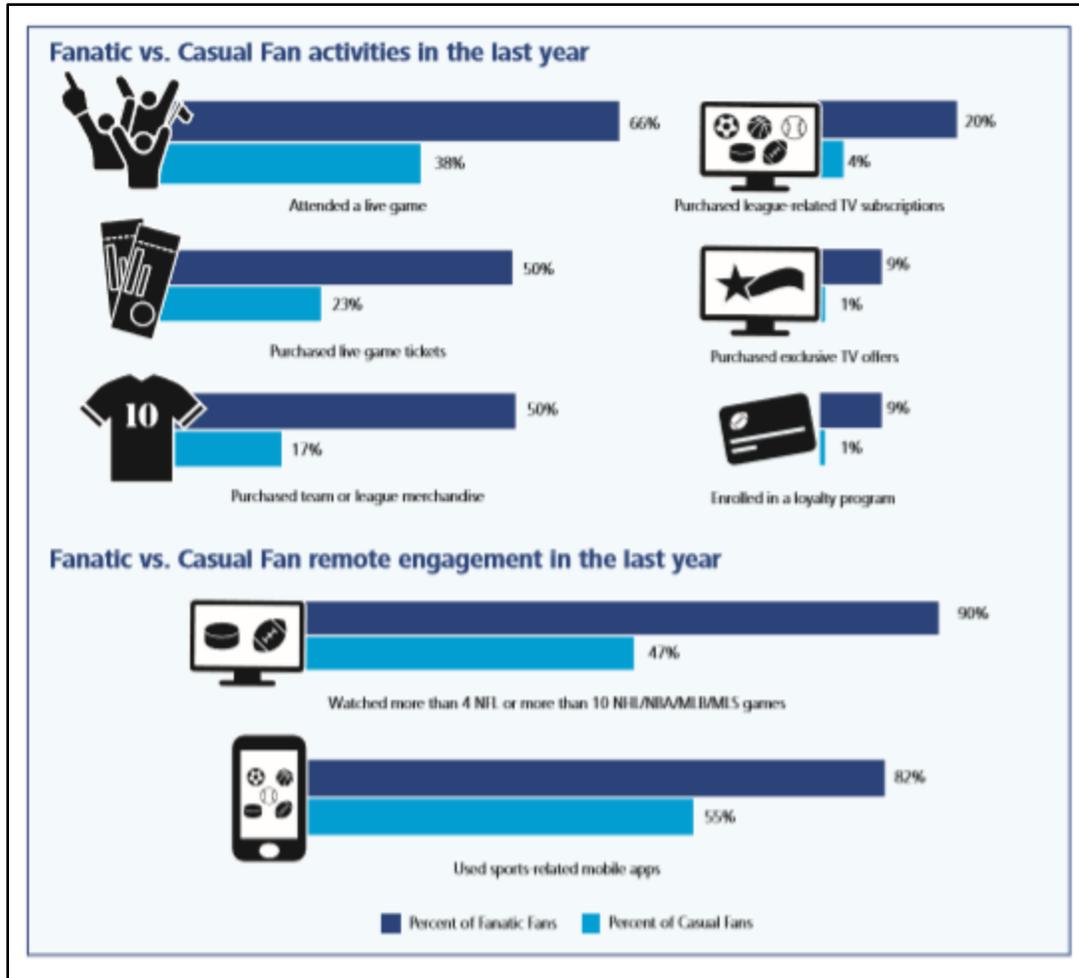
“The live match experience is a focal point for fan and sponsor interaction but not the only touch point. Holistic engagement extends beyond the live game experience. Any substitute for watching a favorite club compete in person will be difficult (even with the advent of virtual reality), but for most sports organizations and sponsors, there is room to improve that live game experience at the match plus other media and the effect it has on spectators.” (Deloitte 2017)



(Source: Deloitte 2017)

Engaged year round meaningful spectator and sponsor associations do not start and stop with the World Cup matches. Fans cannot engage if events do not promote opportunities. Events and sponsors are losing even their most valuable spectators' many untapped opportunities for engagements to drive value during the wait between Cups and matches. (Deloitte 2017)

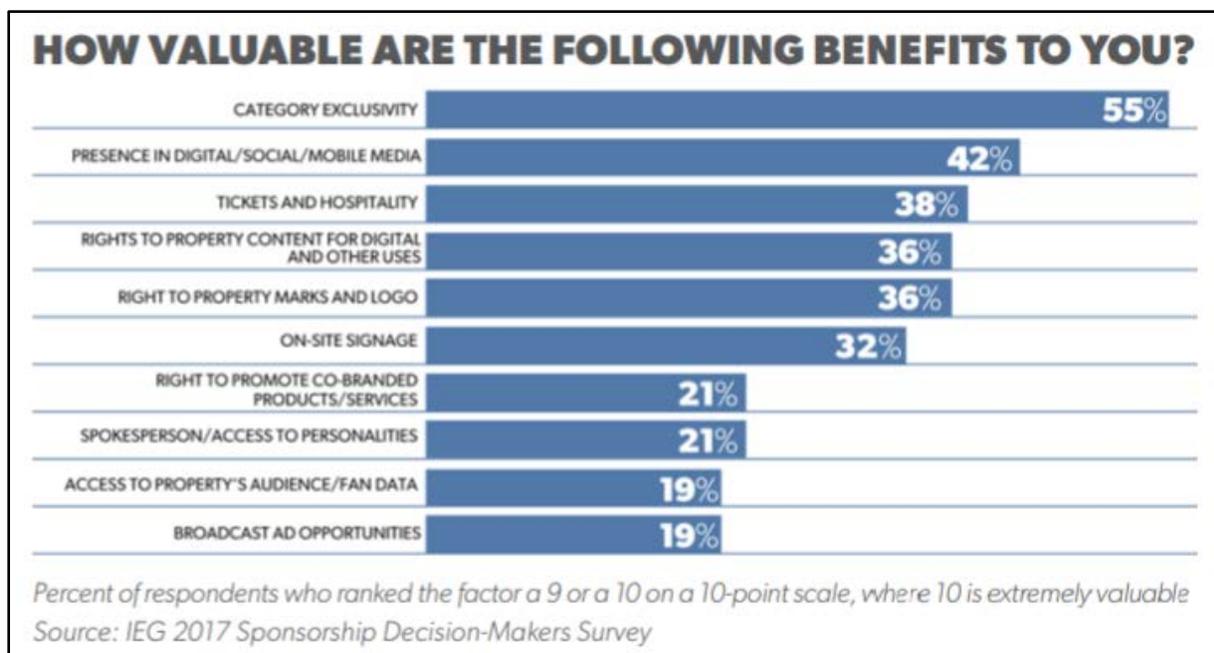
Loyalty identified and measured interaction: Sponsors and event relationships should find ways to identify, reward, and record each fan interaction. Make it personal! Sponsorship strategies designed to speak to everyone run the risk of talking to no one. (Deloitte 2017)



(Source: Deloitte 2017)

Sponsorship Benefit Values:

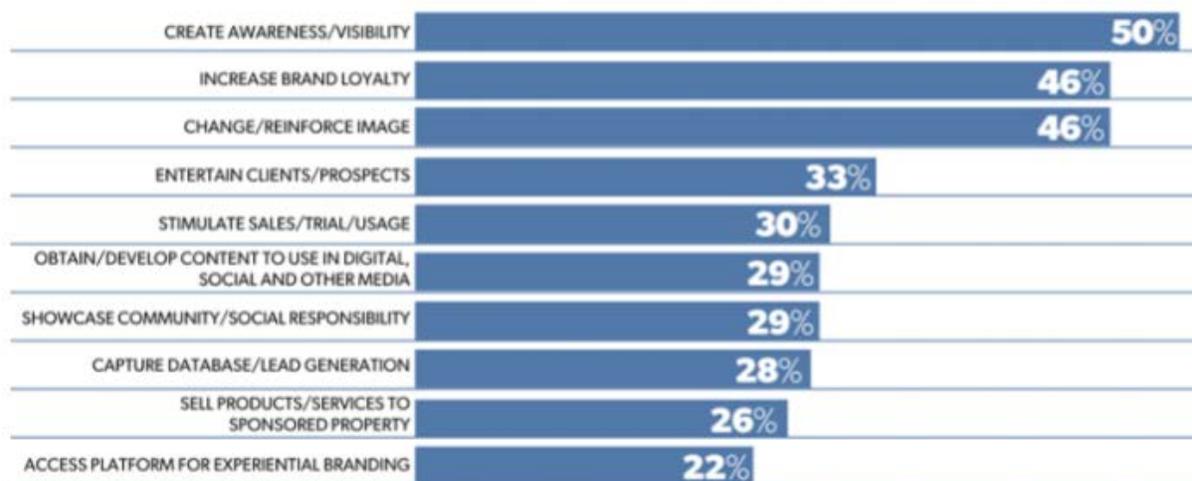
Sponsors may still be focused on benefits such as on-site signage, which fell from second to sixth last year among survey respondents. “When asked to identify the most valuable sponsorship benefits-- instead of presence in rightsholders’ digital, social and mobile media-- which rose from sixth to second.” (IEG 2018)



Sponsorship Objectives and Importance:

Brand managers reported changes in the standings of various objectives for sponsorship. Among the most significant, the ability to stimulate sale, trial, and usage of products and services is now the fifth most crucial goal for sponsorship, with 30 per cent of decision-makers rating it a 9 or 10 on a 10-point scale of importance. In 2016, it was tenth in importance, with only 21 per cent rating it a 9 or 10. (IEG 2018)

HOW IMPORTANT ARE THESE OBJECTIVES WHEN EVALUATING PROPERTIES?



Percent of respondents who ranked the factor a 9 or a 10 on a 10-point scale, where 10 is extremely important

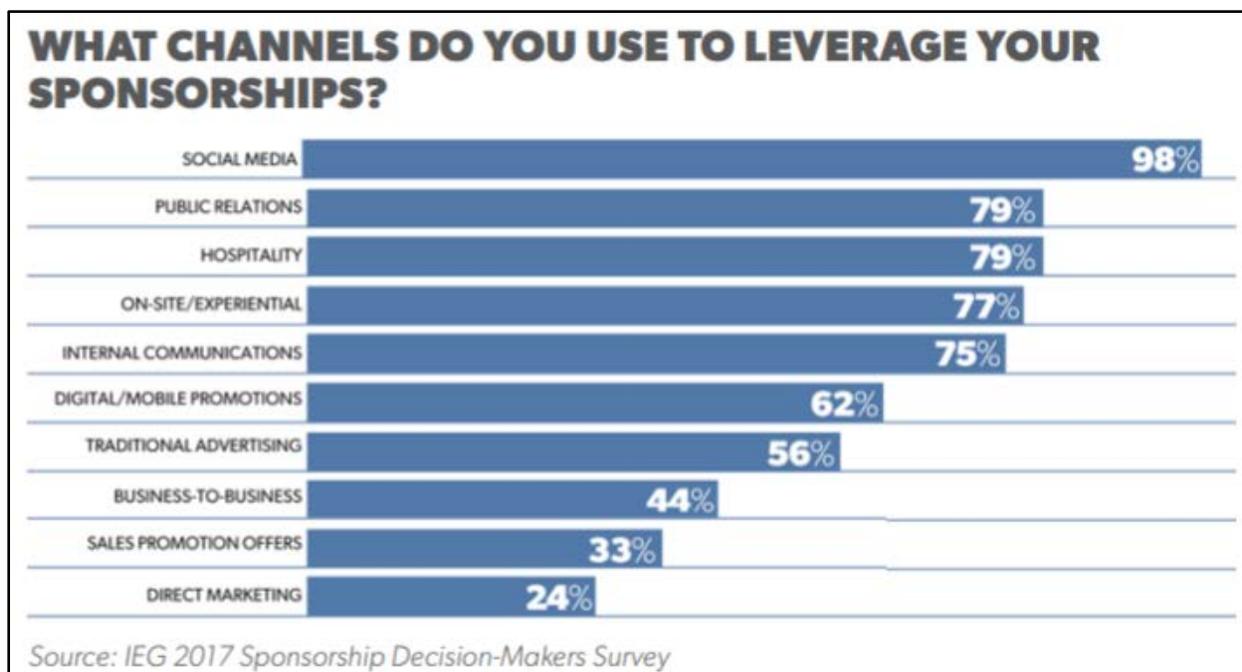
Source: IEG 2017 Sponsorship Decision-Makers Survey

Sponsorship Spend Indicators:

For the most part, sponsors will continue to invest in activation to achieve their objectives. Respondents said they would spend an average of \$2.20 on activating sponsorships for every \$1 spent on rights fees, matching 2016's ratio, which was a high-water mark in the survey's history. That was even though the number of sponsors who said they spent no money on activation increased from 12 per cent to 19 per cent. (IEG 2017)

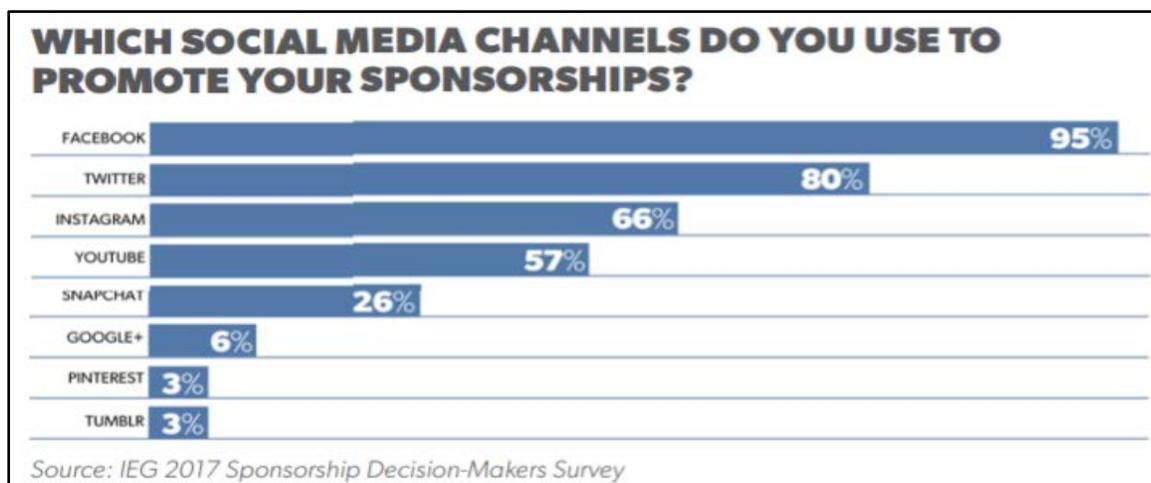
Sponsorship Spend Vs. Marketing Budgets:

Sponsorship globally accounted for 17 per cent of respondent's marketing/advertising/promotion spending this year, down two percentage points from 2016. Once again, social media topped the list of activation channels, with 98 per cent of sponsors using the medium to promote their sponsorships. (IEG 2017)



Social Media and Sponsorships:

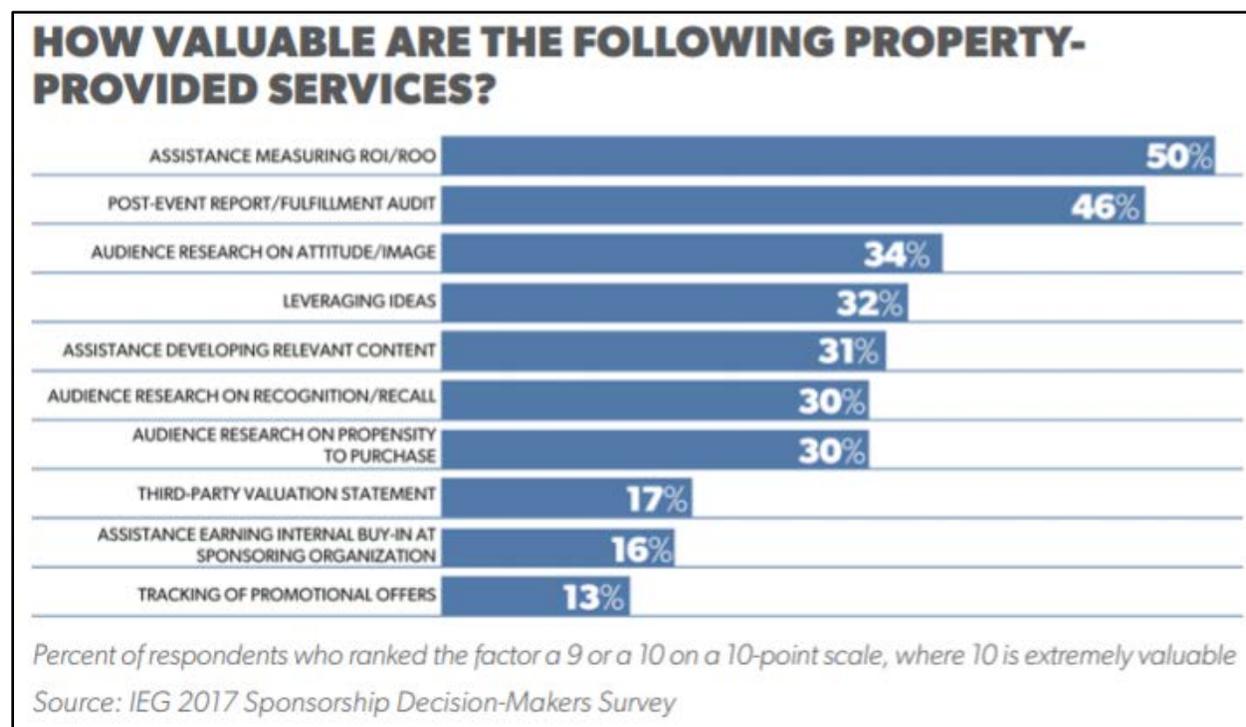
Facebook remained the social platform that more sponsors turned to for activation than any other, with 95 per cent of respondents touting their partnerships on its pages. While Twitter was again the second most relied upon social channel, the number of sponsors utilizing it dropped from 90 per cent to 80 per cent over the past year. Although Snapchat is not yet a go-to social platform for most sponsors, it saw significant growth in the number of sponsors using it from 17 per cent in 2016 to 26 per cent in 2017. (IEG 2017)



In a regional first, before the Moscow matches, Twitter and global football website Goal joined forces for #YallaGoal – a live, Arabic language social media show that aired during the 2018 World Cup. These live exclusive social media shows had an immediate reaction with fans. Ahmet Yavuz, Head of Content for Goal MENA said “... and allow them to view and engage with the best curated real-time conversation around the tournament.” According to recent research conducted by Hall & Partners in Saudi Arabia, Egypt and UAE with Twitter users who intend to follow the 2018 World Cup, 97 per cent of respondents are excited about this year’s games. The majority (72 per cent) said that Twitter is their go-to place for World Cup content, most of whom (54 per cent) plan to access Twitter to watch video highlights of the games. According to recent research conducted by Hall & Partners in Saudi Arabia, Egypt and UAE with Twitter users, the majority (72 per cent) said that Twitter is their go-to place for World Cup content, most of whom (54 per cent) plan to access Twitter to watch video highlights of the games. (Sports Industry Insider 2018)

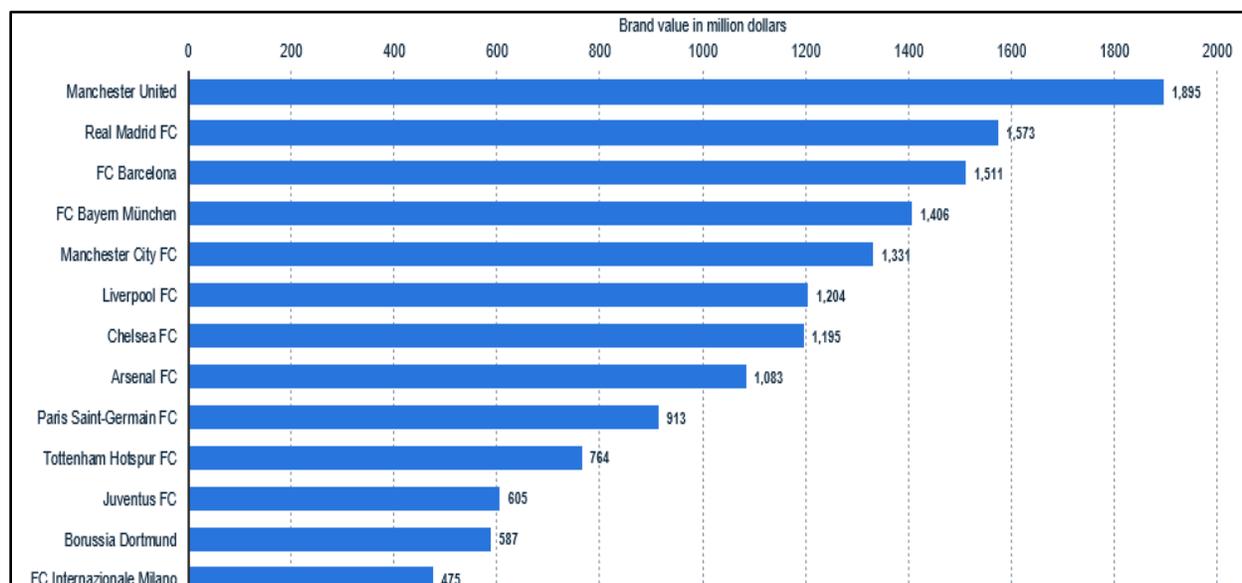
Sponsors Continue to Look to Properties for Performance Measurement:

The most valuable service properties can provide to their partners is help in evaluating whether the sponsorship is meeting its goals, according to survey respondents. Half rated such assistance a 9 or a 10 on a 10-point scale of value, with nearly the same number (46 per cent) rating fulfillment reports equally valuable. (IEG, 2017)



Brand Value of Top Football Clubs Worldwide 2018:

The statistics depict the brand value of the most valuable football clubs worldwide in 2018. According to the ranking, Manchester United has a brand value of 1,895 million U.S. dollars in 2018. (IEG 2018)



FIFA World Cup Marketing Platform Summary:

“The FIFA World Cup represents one of the most effective global marketing platforms, offering sponsors unrivaled opportunities to connect with consumers. Football is the world’s favorite sport, played by more than 240 million players in 1.4 million teams and 300,000 clubs across the world. The FIFA World Cup reaches an audience of size and diversity that is unrivaled by any other single-sport body. Add to this a passion for the game found in all corners of the world, and you have a sporting, social and marketing phenomenon.” (FIFA 2018)

Universal interest in the FIFA World Cup that transcends all age, gender, and social barriers has been proved time and time again by research figures from FIFA’s 15-market global research program. In addition to the massive appeal of the event itself, the packages offered by FIFA make a sponsorship deal with world football’s governing body a hugely attractive

proposition. Each Commercial Affiliate is granted product category exclusivity, offering a unique platform vis-à-vis their competitors.

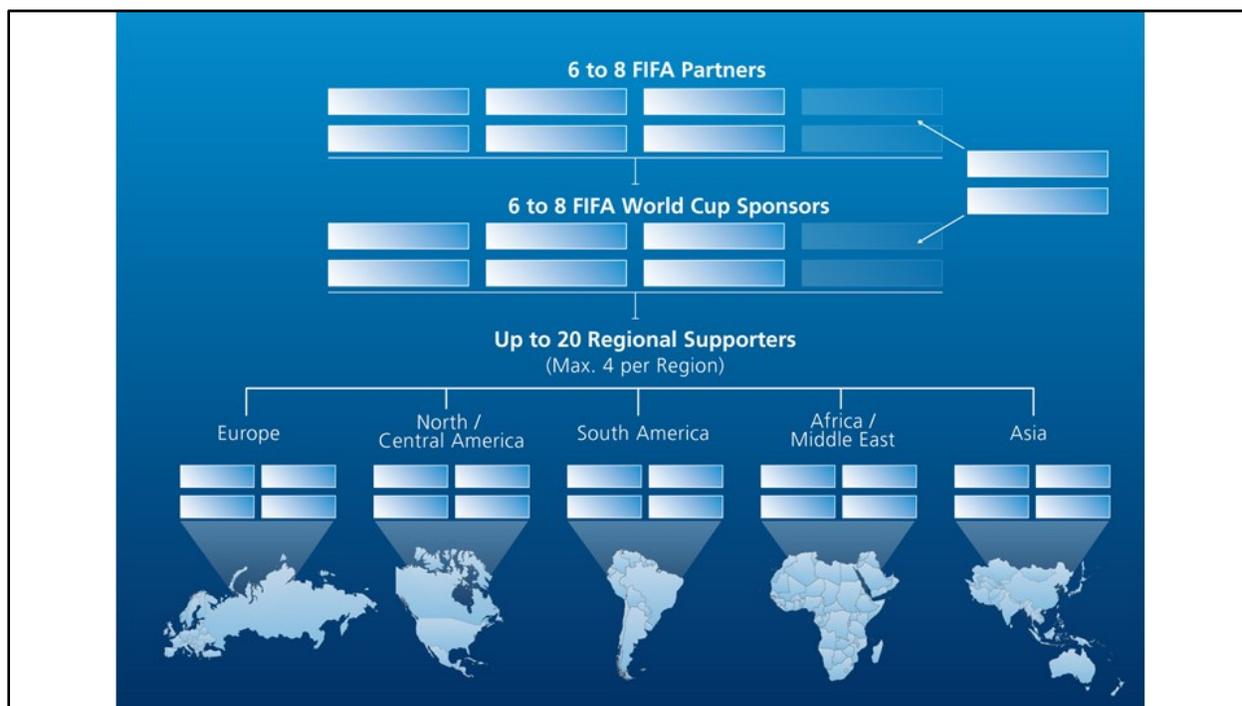


World Cup Sponsorship and Sub-Sponsor Factors:

There are three parties involved in simple sponsorship development and engagement: the sponsor, the sponsored event or team, and the consumers (fans). At FIFA World Cups, this structure becomes more difficult where sub-sponsorship is allowed. As the amount of money invested in sponsorship grows every year, the need for sponsorship studies to understand sponsorship effects and its influencing factors have also grown, which has resulted in the ever-expanding literature on sponsorship. Researchers have found various factors influencing sponsorships effect such as fan identification (Branscomb & Wann, 1993), the length of sponsorship (Howard & Crompton, 2004), congruency between sponsors and the sponsee (Cho & Kang, 2012; Cornwell, Humphreys, Maguire, Weeks & Tellegen, 2006; Meenaghan, 2001a), the extent to exposure (Kang, Lee, & Goo, 2012) and attitude toward the event (Bhat, 2011).

FIFA Sponsorship Structure – 2022 Qatar World Cup:

FIFA's three-tier main sponsorship structure for the 2022 Qatar World Cup includes Partners, Group Sponsors, and Regional Supporters plus additional tournaments.



Partners: The highest association with FIFA events and supporting football worldwide. FIFA selects 6-8 partners who receive exclusive worldwide rights to all of FIFA's events to marketing assets, enhanced media exposure, and an association with FIFA's special events and development initiatives.

Group Sponsors: Rights to the FIFA Confederations Cup and the FIFA World Cup on a global basis enjoy a strong brand association with these two global tournaments, the use of selected marketing assets and media exposure, as well as ticketing and hospitality offers for the events.

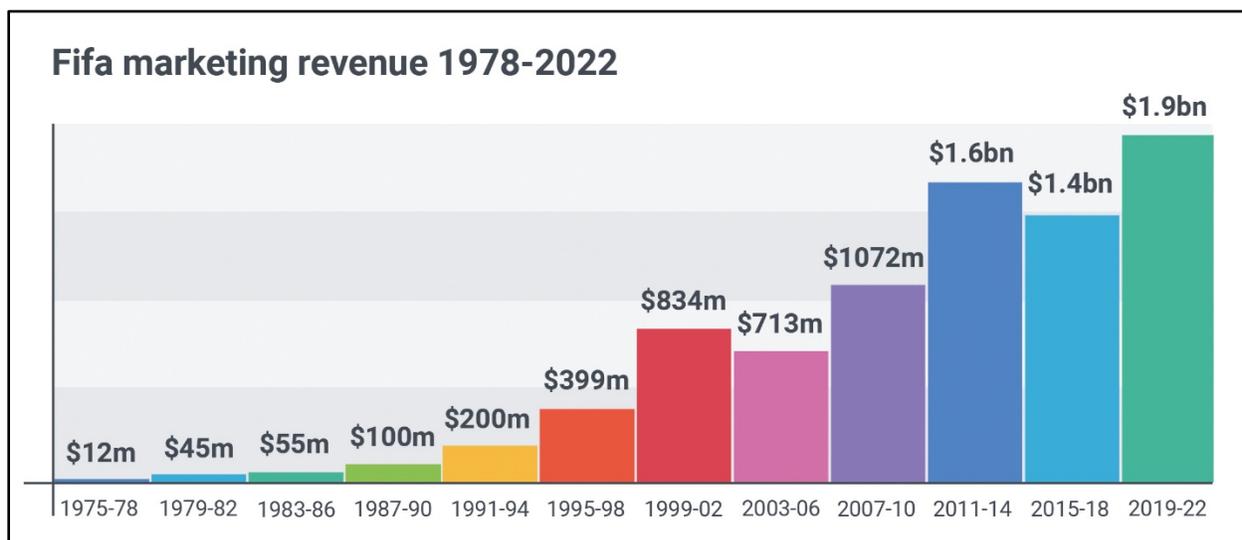
Regional: Ahead of the 2022 Qatar World Cup, FIFA will offer companies the opportunity to purchase local sponsorship packages for the first time. The commercial structure (since 2013) will provide significant opportunities and value for interested companies. The third level of FIFA's sponsorship structure, allowing companies within the pre-defined global regions to promote an association with the FIFA World Cup™ in the MENA market.

Additional Tournaments: FIFA's sponsorship structure for additional tournaments (which includes all tournaments except the FIFA World Cup and the FIFA Confederations Cup) is structured in two tiers:

- 6-8 FIFA Partners – Each FIFA Partner has worldwide rights to all of FIFA's events. The Partner has exclusive rights to marketing assets, enhanced media exposure, and an association with FIFA's special events and development initiatives.
- Up to 6 National Supporters - The National Supporter is a level of sponsorship open to domestically owned companies whose principal place of business and principal operations are situated in the host country. This level of sponsorship is explicitly designed for activation within the territory where the event is taking place and is therefore targeted at domestic corporations. Marketing rights for national supporters are granted on an exclusive basis in order to allow the National Supporter to more effectively and successfully exercise the rights granted to it without dilution by the involvement of third parties.



FIFA World Cup Marketing Platform (FIFA.Com):



The FIFA World Cup is the most effective international marketing platform, reaching millions of people in over 200 countries throughout the world. In order to be able to stage an event of such a scale, the support of Commercial Affiliates, who provide vital services and product support for the entire event's operations, is crucial. (FIFA.com)

The standard rights package includes

- The use of the Official Marks
- Exposure in and around the stadium, in all Official FIFA publications and on the official website, <http://www.fifa.com>
- Acknowledgment of their support through an extensive FIFA World Cup sponsor recognition programme
- Ambush marketing protection
- Hospitality opportunities
- Direct advertising and promotional opportunities and preferential access to FIFA World Cup™ broadcast advertising

Also, the Partners are offered the possibility to tailor their sponsorship according to their marketing strategy and needs. For example, they can individually use the Official logo and create composite logos. Customizing not only allows them to differentiate themselves creatively from uninvolved third parties but also gives them an excellent marketing tool. (FIFA.com)

DISCUSSION AND APPLICATION

Challenges for the World Cups and Sponsorships:

Just before the 2018 World Cup, FIFA was going through a critical time both financially and reputation damage control.

Media rights for Moscow were not sold out like the 2014 World Cup Brazil. Lack of interest among Russian businesses did not fill the top-tier partner sponsors for the event. Local partnership, crucial to FIFA finances but also in building excitement among fans in the host

country, had been noticeably absent in Russia. In 2018, the results for Russia sponsorships were flat. (FIFA.com 2018)

Western companies became increasingly hesitant of doing business with FIFA in the wake of a corruption investigation in 2015 by the United States Justice Department. While 32 nations made the 2018 tournament in Russia, a reflection of how much the reputational damage from a much-publicized FIFA corruption crisis? (NYTimes, 2018)

Although FIFA had not signed a new sponsor from a Western nation since 2011 long-term backers of the tournament, including Adidas, Visa, and Coca-Cola, are still on board. (NYTimes, 2018)

China's renewed interest in soccer was spurred by President Xi Jinping's demand in 2015 that the country builds a sports economy, with a particular focus on football. Six months before the Moscow World Cup's opening game, Wanda Group (Chinese Multinational Conglomerate, 2018) paid \$150 million to sign up as one of FIFA's eight top-tier "partners," but the last of those places not to mention two of the six places for second-level "sponsors" remained open. Their cash has more than compensated for the decline in Western support, as many American and European companies, including Johnson & Johnson, Castrol, and Continental, pulled back. (Scott Roxborough, 2018)

"If you are going to do a big deal and want to activate, it is late," said Tim Crow, who recently stepped down as the chief executive of Synergy, a firm that has advised Olympic and World Cup, sponsors. "You normally want your campaign in the market now, or by January and February; what's more, it can take anywhere from six months to a year to plan it all." (NYTimes, 2018)

Strategies for 2022 FIFA World Cup Sponsorships (Fill in the blanks):

FIFA World Cup Russia 2018 sponsors

FIFA PARTNERS (7 of possible 8)

| | | | |
|--|--|--|--|
| | | | |
| | | | |

FIFA WORLD CUP SPONSORS (4 of a possible 8)

| | | | |
|--|--|--|--|
| | | | |
| | | | |

REGIONAL SPONSORS (1 of a possible 20)

| | | | | | |
|--------|-------------------------|---------------|----------------------|------|--|
| | | | | | |
| Europe | North / Central America | South America | Africa / Middle East | Asia | |

CONCLUSIONS

The process for attracting, converting and retaining sponsors is fundamental to the process. Research high-value sponsors that compliment the event and customer distributions including social media and buying trends. Pitches that are relevant and resonate to a relationship having the same purpose. Demonstrate how the sponsor can prove local and global positioning fit. To optimize the sponsorship, insights, and data is needed to prove the impact made exceed the strategic plan. Report and review to justify the value the sponsor will make.

For World Cup Qatar it is imperative to discover sponsors who match in ideals, objectives, and goals that reach the same spectators with a message that resonates for all. Finding potential sponsors is a long and laborious process involving a significant investment of time, resources, and expertise. However, before starting research on potential sponsors, it is essential for the event to have clarity about its fans and audience (globally, regionally, and regionally). An in-depth understanding of the “Qatar” message, defined fan base, and demographics plus benefits

and limitations will help in expressing the event's value proposition more effectively to its sponsors.

Discussion Questions:

- 1) How do you preparing and what are the differences for strategic sponsorships planning partnership selection globally, regionally, and locally?
- 2) How do reputations and business ethics effect sponsorship?
- 3) FIFA World Cups have had challenges over the last few events. What were they and how can Qatar apply the learning for World Cup 2022?
- 4) In planning for the World Cup 2022, who, where, and how would you find the best sponsorship partnerships by Partners, Group Sponsors, and Regional?

Definitions:

MENA: The Middle East and North Africa region (MENA) including Algeria, Bahrain, Egypt, Jordan, Lebanon, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, United Arab Emirates, and Yemen.

Brand Value: A business' brand value is the estimated enterprise value the business would sell for in an arms-length transaction, less the enterprise value of a typical industry peer of equal size would sell for.

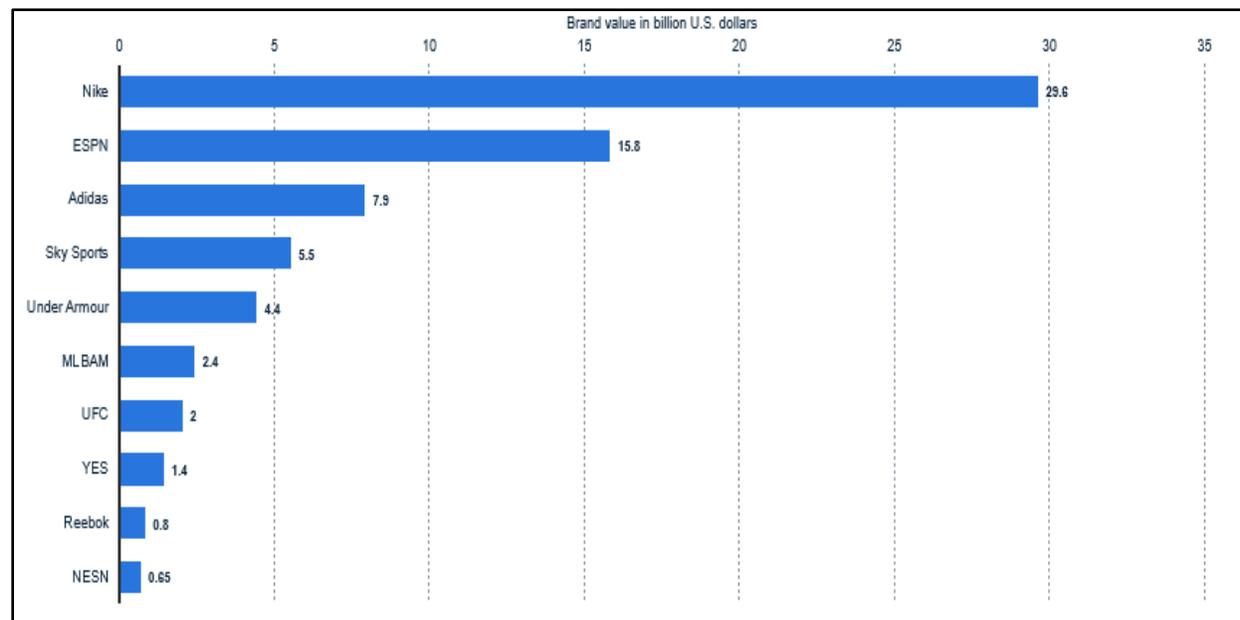
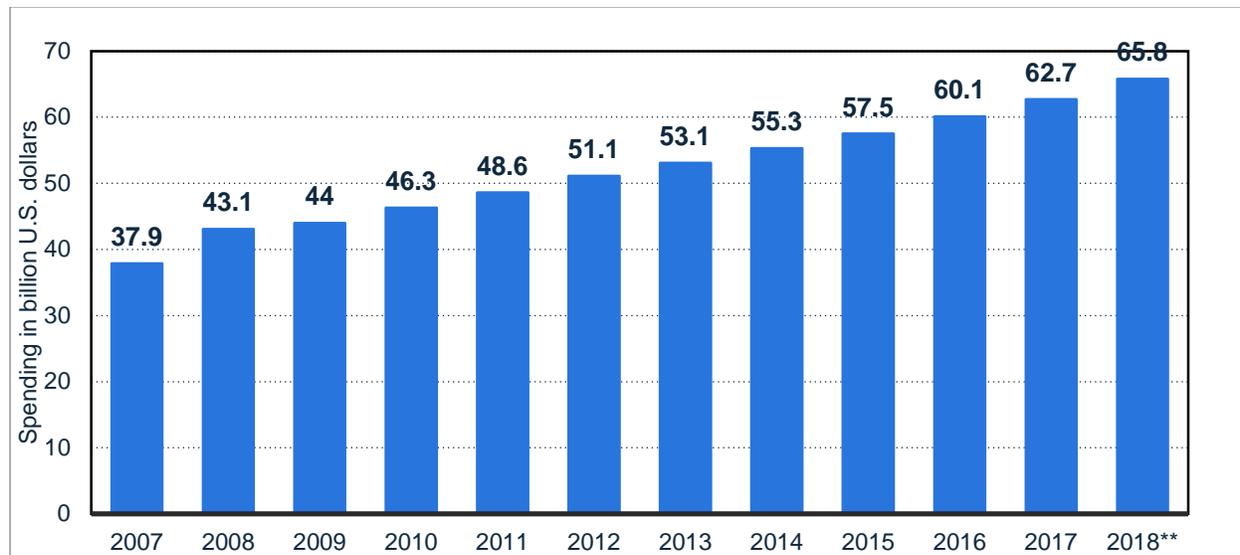
Event brand value is the sum of revenue from media, sponsorships, tickets and licensed merchandise, per each event day.

Off-season engagement: Participating in at least one of the following activities: Exclusive team events, attending team-sponsored community events, participating in player/mascot/executive meet-and-greets, attending other pre-season activities (e.g., off-season workouts, spring training, practice days, draft).

Wanda Group (Chinese Multinational Conglomerate, 2018). Wanda Group, or Dalian Wanda, is a Chinese multinational conglomerate based in Beijing. It is a private property developer and owner of Wanda Cinemas and the Hoyts Group, as well as a majority shareholder of AMC Theatres. <http://www.wanda-group.com/>

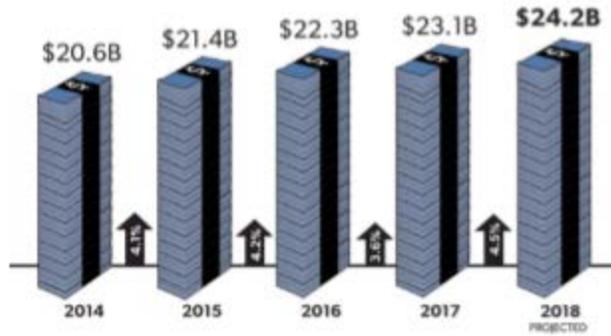
Appendix

Global sponsorship spending from 2007 to 2018 (in billion U.S. dollars):



Worldwide: 2007 to 2017, Source(s): IEG; [ID 196864](#)

TOTAL NORTH AMERICAN SPONSORSHIP SPENDING



TOTAL GLOBAL SPONSORSHIP SPENDING



www.sponsorship.com

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