

DHBW Mannheim × toluna

2026
Market Intelligence
Project

Turning sports sponsorship into brand impact

Lessons for global brands from German consumer research ahead of the 2026 FIFA World Cup

Introduction

Major sporting events bring together competition, identity, community, and emotion. For brands, they offer an opportunity to participate in moments that matter deeply to consumers. The challenge is translating that presence into a meaningful connection and understanding whether the investment strengthens the brand.

The 2026 FIFA World Cup provided a compelling context for examining this challenge. Official sponsorship, advertising, and participation in football culture offered brands different routes to visibility. Consumers encountered these activities together, through the teams they followed, the content they watched, and the brands they already associated with the sport.

For marketing and insights leaders managing brands across markets, this raises fundamental questions. What makes a brand's involvement recognizable and credible? How does fan engagement influence advertising response? When does the emotion surrounding an event translate into stronger brand relationships? And which measures distinguish broad exposure from meaningful impact?

This whitepaper explores these questions through research conducted by the Digital Commerce Management program at DHBW Mannheim in collaboration with Toluna. It combines desk research, a survey of 301 consumers in Germany, twelve qualitative interviews, and AI-based creative testing using synthetic personas. The consumer research captured attitudes before the tournament; it does not assess the event's final commercial outcomes.

Grounded in Germany, the research addresses questions relevant to international brand owners, insights teams, and agency partners. Its findings offer a perspective to test and build upon across markets, recognizing that sporting culture, brand associations, and media behavior vary locally. The following analysis considers how audience understanding, creative execution, and measurement can help brands make more effective use of sponsorship.

Executive summary

Official status is only the beginning

The project's central finding is that sponsorship rights create an opportunity for brand impact, but do not guarantee it. In the German research, consumers' responses reflected their interest in football, their existing brand associations, and the relevance of the communication they encountered. Official status alone offered a limited explanation of stated purchase preferences.

Respondents did not always distinguish official World Cup sponsors from other brands associated with football. This matters because the value a sponsor expects from exclusivity may not be reflected in consumer memory. Recognition must be earned through activation that connects the brand clearly and credibly with the experience.



The research also identified differences between highly involved fans and less engaged audiences. Creative testing added diagnostic evidence about attention and potential response, although its synthetic-persona outputs should be distinguished from observed consumer behavior.

For global teams, the practical implication is to connect sponsorship decisions with a clear audience strategy and a measurement plan. Use a common set of objectives across markets, then adapt the execution to local football culture and brand perceptions. These are strategic applications of the research, rather than findings from a multi-country study.

Research design and context

Four complementary research perspectives

The 2026 Market Intelligence Project combined methods to examine both what consumers reported and how they explained their perceptions. Each component served a different purpose.

Together, these perspectives helped identify recurring themes and possible explanations. They do not carry equal evidential weight: survey responses, interview accounts, and AI-generated diagnostics answer different questions and should be interpreted accordingly.

Consumers encountered an overlapping field of brands

The World Cup sponsorship environment brought official partners into the same consumer experience as national team suppliers, media brands, sportswear companies, and brands participating through advertising or football-related content. Their activities shared familiar references, including players, shirts, viewing occasions, and fan communities.

Consumers did not necessarily organize those encounters according to the underlying rights agreements. A brand's established connection with football could shape perceived sponsorship as much as its formal position. The research therefore examined sponsorship from the consumer's perspective: which brands came to mind, why they seemed relevant, and what prompted a response.

For international teams, this is a useful distinction. A global rights agreement can provide a consistent platform, while the associations consumers bring to that platform may differ substantially by market. Local research is needed to understand those differences before assuming that one activation will work everywhere.

Making ongoing insights more accessible

The DHBW Mannheim project also illustrates the role self-service research can play in exploring a business question. With Toluna Start supporting the quantitative survey, the team gathered perspectives from 301 consumers in Germany and examined how people understood sponsorship, recalled brands, and described their purchase preferences.

For brand and insights teams, this approach has applications beyond a single event. One study can reveal a gap in understanding and help define the next question: whether consumers recognize a partnership, how perceptions differ between audiences, or whether a revised message communicates the intended brand association.

Toluna Start makes that process easier to manage by bringing survey creation, audience access, and analysis into one platform. Teams can use a drag-and-drop survey builder or automated research solutions, then explore incoming results through interactive dashboards. Flexible service options allow them to work independently or draw on expert support.

The opportunity is to make consumer feedback a more regular part of decision-making. Clear objectives and sound research design remain essential; accessible tools help teams put those disciplines into practice as new questions emerge.

Sponsorship status and consumer perception



INSIGHT 1

Official status had limited influence on stated purchase choices

In the project's purchase-choice questions, official sponsor status was not the deciding factor for most respondents choosing between equivalent products. Price, habit, and product relevance remained important, while an emotionally engaging campaign could matter more than the sponsorship designation itself.

These responses describe stated preferences, rather than observed sales. They nevertheless suggest that sponsorship needs a clear connection to the brand's wider proposition. Rights can create access and communication opportunities; activation must give consumers a reason to pay attention and consider the product.



INSIGHT 2

Familiarity could be mistaken for official sponsorship

Sponsor misattribution was a recurring finding. Respondents appeared to draw on memory, perceived fit, and established football associations when identifying sponsors. Sportswear brands were particularly well placed to benefit from links with players, national teams, and equipment.

The project reported frequent recognition of Coca-Cola and Adidas as sponsors, alongside attribution of official World Cup sponsorship to Nike, which it classified as a non-sponsor in the FIFA context. The distinction concerns tournament sponsorship; consumers may also encounter brands through separate team or athlete relationships.

For official sponsors, this creates a measurement challenge. Brand recall alone cannot establish whether consumers recognize the intended partnership. Tracking should distinguish awareness of the brand from correct recognition of its event relationship and identify competitors receiving similar associations.



INSIGHT 3

Cultural relevance could extend beyond official partners

The qualitative findings suggested that consumers could respond positively to brands participating in football culture without holding official tournament sponsorship rights. Perceived authenticity and value to fans helped explain that acceptance.

This provides context for the project's discussion of ambush marketing. Consumer associations can arise through a brand's wider presence in the sport, even when an official relationship does not exist. The research does not establish that every such association was deliberately created or that particular campaign tactics are permissible.

The strategic lesson is to evaluate competition as consumers experience it. Official sponsors compete for attention with a wider set of brands than the partner roster alone suggests. Brands participating outside that roster still need a credible role and clear communication about their relationship with the event.

Audience involvement and creative response



INSIGHT 4

Fan involvement shaped receptivity

Highly involved football fans in the research recalled more brands, noticed advertising more often, and reported greater receptivity to sponsorship communication. Less involved respondents were more likely to overlook it or question its relevance, particularly when the brand's connection felt weak.

This qualifies the value of aggregate reach. Exposure to a popular event does not imply equal interest in every brand associated with it. Audience planning should consider fan engagement alongside demographic characteristics, then assess whether less involved consumers need a different message or viewing context.



INSIGHT 5

Audiences engaged through different media

The project identified differences in how audiences followed football and encountered brand communication. Television remained relevant to shared viewing, while streaming, social media, short-form content, and second-screen activity played a larger role for younger and digitally oriented audiences.

These patterns support assigning channels specific roles within an activation plan. Broad coverage can build recognition; other formats can invite participation or provide useful content around viewing occasions. Global teams should validate the channel mix locally and test whether the brand remains recognizable as creative work moves between formats.



INSIGHT 6

Creative diagnostics revealed distinct challenges

The AI-based testing suggested that an advertisement could perform differently on recall, liking, attention, and potential response. A recognizable football setting did not necessarily provide a strong opening or a clear reason to engage with the brand. Attention emerged as a weakness in several tested executions.

Humor, surprise, and emotional relevance were associated with stronger responses in the project's interpretation of the creative diagnostics. These outputs suggest directions for development and testing; they do not demonstrate incremental sales or establish how real audiences responded in market.

Creative teams should examine the opening, brand identification, and intended response separately. Consumer testing can then assess whether improvements to one dimension also strengthen the communication as a whole.



INSIGHT 7

Enthusiasm for the sport did not ensure brand affinity

Interview participants could feel strongly about the World Cup while regarding sponsorship as interchangeable or overtly commercial. Their enthusiasm for the event did not automatically extend to the brands surrounding it. A credible contribution to the fan experience helped explain why some involvement felt more meaningful.

For brands with an established football connection, that contribution may be readily understood. Others need to establish it through relevant experiences, useful services, or communication that reflects how people enjoy the sport. The role should make sense for the product and the audience.

Applying the findings to global strategy

A practical framework for sponsorship impact

The project proposed a staged view of sponsorship effectiveness. The framework below translates its themes into planning questions. It is a diagnostic tool, rather than a validated causal model: strength at one stage does not guarantee progress to the next.

Plan rights and activation together

Before committing resources, define the audience, the role the brand can credibly play, and the outcome the activity should support. Assess whether sufficient creative, media, and measurement resources are available to make use of the rights. This helps connect the partnership's commercial rationale with the consumer experience.

Combine global consistency with local evidence

Global teams can set common objectives and measurement definitions while giving local teams room to adapt the execution. Research should establish existing brand associations, fan involvement, and media habits in each priority market. A message that feels natural in one football culture may require a different expression elsewhere.

Develop media and creative plans together

Consider the viewing context during creative development. Test whether the opening earns attention, whether branding survives shorter formats, and whether the proposed interaction offers value to the audience. Use AI diagnostics to inform hypotheses and iteration, alongside consumer evidence suited to the decision.

Apply the learning to future investment

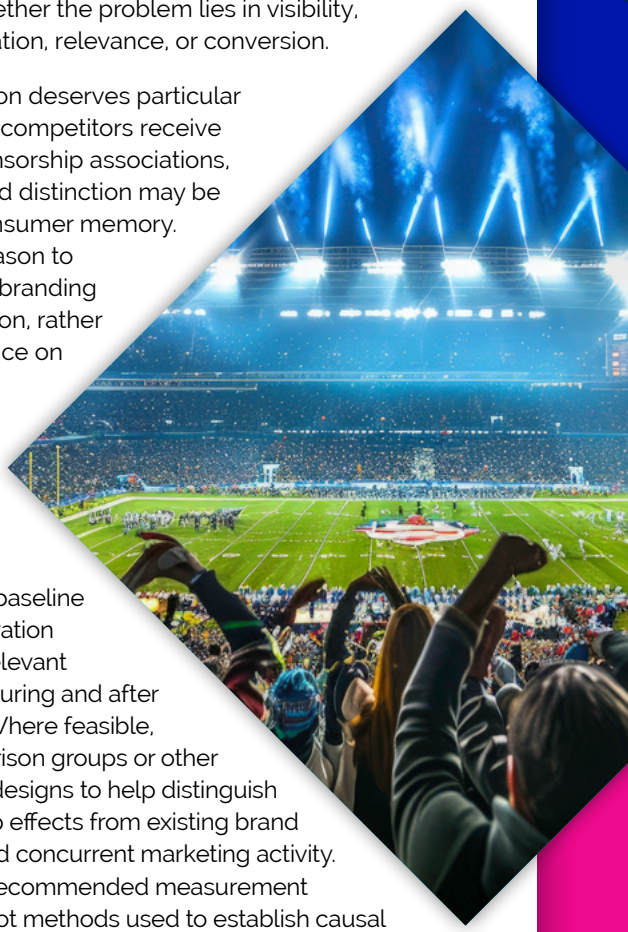
The pre-tournament findings can inform reviews of 2026 activity, but cannot establish what that activity achieved. Where available, compare these themes with subsequent brand tracking and campaign evidence. Use that assessment to guide future partnerships and activation plans rather than treating the study as a retrospective return-on-investment evaluation.

Measuring sponsorship effectiveness

A sponsorship measurement plan should connect delivery with consumer response. Reach and exposure establish whether an activity was seen; additional measures help explain whether it was understood, correctly attributed, and relevant to the brand's objectives.

These measures should remain distinct. Advertisement recall is different from sponsor recognition, and purchase intention is different from a purchase. Reporting them separately helps teams identify whether the problem lies in visibility, communication, relevance, or conversion.

Misattribution deserves particular attention. If competitors receive similar sponsorship associations, the intended distinction may be weak in consumer memory. That is a reason to investigate branding and activation, rather than evidence on its own that the rights have no value.



For future programs, establish a baseline before activation and track relevant measures during and after the event. Where feasible, use comparison groups or other evaluation designs to help distinguish sponsorship effects from existing brand strength and concurrent marketing activity. These are recommended measurement practices, not methods used to establish causal impact in this project.

Across countries, maintain comparable definitions while examining local results. A global average can obscure an activation that works well among engaged fans in one market but creates little recognition elsewhere. The purpose of measurement is to identify what to retain, improve, or test next.

Research scope and conclusions

How to interpret the findings

This whitepaper presents a synthesis of the 2026 DHBW Mannheim x Toluna Market Intelligence Project. Its evidence offers a German perspective on sponsorship perceptions and creative development. It does not establish the overall effectiveness of World Cup sponsorship or the performance of individual partnerships across countries.

The quantitative survey captured a pre-tournament perspective. Recall, emotion, and sponsorship perceptions could have changed as the tournament unfolded. Although the source described the sample as nationally representative, its size of 301 respondents calls for care with subgroup comparisons and broad generalizations.

The twelve qualitative interviews explored motivations and interpretations in depth; they were not representative of the German population. AI-based testing with synthetic personas provided creative diagnostics, rather than observed human responses or in-market tracking. Differences in advertisement length, channel strategy, and production approach also limited direct comparisons between tested executions.



Taken together, the methods support a set of questions and strategic hypotheses for further testing. Applying the findings elsewhere requires evidence about local audiences, brand relationships, and media contexts.

Conclusion

The research places consumer perception at the center of sponsorship strategy. Official rights can provide valuable opportunities, while their effect depends on how people encounter and interpret the brand's participation. In this project, fan involvement, established associations, perceived relevance, and creative execution helped explain differences in response.

For global brand leaders, the next step is to connect partnership decisions with audience insight and a clear evaluation plan. Define the role the brand should play, test whether the creative communicates that role, and measure the intended outcome. Local evidence can then guide adaptation while common objectives keep the wider program coherent.

The enduring question for future sponsorship investment is what a brand contributes to the experience and whether consumers recognize that contribution.

Research foundation

Source: 2026 Market Intelligence Project, Digital Commerce Management program, DHBW Mannheim, conducted in collaboration with Toluna.

The research comprised desk research on the World Cup sponsorship environment; a German quantitative survey with 301 participants conducted through Toluna Start; twelve qualitative in-depth interviews; and AI-based creative testing with synthetic personas of selected World Cup-related advertisements. The synthesis drew on project presentations, speaker notes, and methodological components.



Research finding	Implication for global brand teams
Official status had limited influence on stated purchase choices.	Plan activation alongside rights investment and define the response it should encourage.
Consumers sometimes inferred sponsorship from brand familiarity and football associations.	Track correct attribution and confusion with competitors.
Brands without official rights could still be associated with the event.	Assess the full competitive environment consumers encounter.
Fan involvement influenced recall and receptivity.	Segment audiences by engagement as well as demographics.
Creative diagnostics highlighted differences in attention, liking, and potential response.	Test these dimensions separately and validate performance with consumer research.
Venture Funds and Investors	51%

Component	Contribution
Desk research	Established the sponsorship context, including official partnerships, other brand activity, and activation examples.
Quantitative survey	Examined sponsor recall, misattribution, advertising perceptions, purchase criteria, and audience involvement among 301 consumers in Germany, using Toluna Start.
Qualitative interviews	Explored sponsorship perceptions, authenticity, emotional associations, and fan involvement through twelve in-depth interviews.
AI-based creative testing	Used synthetic personas to evaluate selected World Cup-related advertisements on dimensions including attention, brand fit, liking, recall, and potential response.

Stage	Planning question
Access and visibility	What opportunities does the partnership create to reach the intended audience?
Attention	Does the execution attract notice in the environments where it will appear?
Relevance and credibility	Can consumers understand why the brand belongs in this context?
Brand connection	Do they connect the experience or message with the intended brand?
Response	Does the activity support the intended change in consideration, preference, or action?

Measurement area	What to examine
Exposure and attention	Whether priority audiences encountered the activity and noticed it.
Brand and message recall	Whether people remembered the intended brand and communication.
Sponsor attribution	Whether the partnership was recognized correctly and which competitors were confused with sponsors.
Fit and authenticity	Whether the brand's involvement felt relevant and credible.
Liking and emotional response	How people felt about the execution and whether the emotion connected with the brand.
Consideration and action	Whether stated consideration or measurable behavior changed in relation to the objective.
Audience differences	How results varied by fan involvement, market, and channel.