CANADIAN SPONSORSHIP FORUM

the business of sponsorship storytelling

February 12-14, 2009 • Québec City

3rd Annual Canadian Sponsorship Landscape Study

Institute for Sport Marketing

Norm O'Reilly, Laurentian University * Steven Ayer, Imagine Canada

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Agenda

- Introduction
- Sponsorship Landscape Study
  - Methodology
  - Results & ‘Stories’
    - Sponsors
    - Sponsees
    - Agencies
    - Sponsorship Industry Size Estimation
- Signature Study: Canada Survey of Business Contributions
  - Opportunity
  - Landscape
  - Competition
  - Implementation
- Summary

History

- 2006
  - CSF attendee feedback – inspiration for study
  - Partnership: TrojanOne, IMI, ISM, CSF
- 2007
  - First edition – presented CSF Toronto
  - Extensive study of sponsors, sponsees, agencies
- 2008
  - Second edition – presented CSF Halifax
  - Main study repeated + focused study on small business sponsorship
- 2009
  - Third edition – today
  - Main study repeated + focused study on not-for-profit sponsorship

RATIONALE

Industry Value

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- Keynote Presentations at 3 CSFs
- Largely positive feedback from CSF attendees
- Publication in Journal of Sponsorship (2008)
- Results reported by Sponsorship Media: Sport Decision, The Sponsorship Report, and Media
- Adoption for business purposes by organizations (e.g., CFL, Rugby Canada, Sport Matters Group, Sport4Ontario, City of Toronto)

Canadian & Int'l Media Coverage

iSM Institute for Sport Marketing

Forbes.com

PJ PHILANTHROPY JOUR

REUTERS

ources

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ReportonBusiness.com

Telegraph.co.uk

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The Stories

Story 1 (O’Reilly)

“What is happening with sponsorship in Canada?”

Story 2 (Ayer)

“What is going on in the not-for-profit sector in Canada and what does it mean viz-a-viz sponsorship?”

SPONSORSHIP LANDSCAPE STUDY

The Study Plan

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- Sponsorship growth & resulting need for data
- CSF delegate demand
- Academic research
- Understanding of key success factors in sponsorship
- Sponsors and sponsees remain “disconnected”

CSF

IMI

SPONSORSHIP LANDSCAPE STUDY

•2007 (May-Aug)

•2008 (March-May)

•2009 (Jan-Feb)

Data Collection Tool

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- Online, Bilingual, Secure Survey (IMI managed)
- Approved by Laurentian University Ethics
- Survey separates sponsor, sponsee, and agency
  - Approximately 250 variables collected (down from 743 in 2007)
- Online data collection in 2008 and 2009; following telephone focus in 2007 (rationale: resources & efficiency)
- Recruitment
  - Sponsors: existing & purchased industry databases
  - Sponsees: compiled databases of municipalities, festivals, sport organizations, fairs, arts organizations, charities, etc.
  - Agencies: compiled database of active organizations

Respondents Profile (2009)

- 52% are the primary sponsorship decision maker
- By Position
  - 48% CEOs or Presidents
  - 23% VP, Marketing or Sponsorship
  - 13% Director/Manager, Marketing or Sponsorship
  - 7% Managing Director or Managing Partner
  - 6% Director/Manager, Events
  - 3% Chief Research Officer
- 22% of their time spent on sponsorship-related activities
  - A drop from 2008 (36%)
- Each organization has 5 (5.1) people working at least 25% of their time on sponsorship

Sampling Frame 2009, 2008 & 2007

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2009

- 567 respondents
- 357 responded to ethics form (351 accepted and 6 declined)
- 323 responded to organizational definition:
  - 67 Sponsors
  - 145 Sponsees
  - 65 Agencies
  - 46 Did Not fit these categories

2008

- 1012 respondents
- 767 responded to ethics form (735 accepted and 32 declined)
- 548 responded to organizational definition:
  - 109 Sponsors
  - 167 Sponsees
  - 61 Agencies
  - 221 Did Not fit these categories

2007

- 1375 respondents
- 768 responded to ethics form (744 accepted and 24 declined)
- 647 responded to organizational definition:
  - 171 Sponsors
  - 247 Sponsees
  - 86 Agencies
  - 143 Did Not fit these categories

Why the reduced interest?

THE TIMING?

THE ECONOMY?

CP Photo:
www.ctv.ca

POLL: Given the economic crisis – will sponsorship investment in 2009 decrease for the first time in over 20 years?

1) Yes
2) No, but it will not increase, it will stay the same
3) No, it will continue its 10% year-over-year growth

RESULTS – SPONSORS

Characteristics of Sample (n=67)

- How big are they?
  - 1000 full-time paid staff (Range: 4 to 30,000)
  - Head Office Locations: representative of Canada (GTA highest, then metro MTL, then greater VAN)
  - Annual Sales: $280 M (Range: $125k to $7.7B)
    - 10 sponsors >$1B
- Where is business?
  - National: 62.5%
  - Provincial: 28.0%
  - Multi-Prov: 9.5%
    - *Change from 2007*
- Industry (see chart)

Which industry does your organization operate in (please pick the most relevant response)?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Division A: Agriculture, Forestry, and Fishing	5	7.5	8.6	8.6
	Division D: Manufacturing	8	11.9	13.8	22.4
	Division E: Transportation, Communications, Electric, Gas an	12	17.9	20.7	43.1
	Division F: Wholesale Trade	6	9.0	10.3	53.4
	Division G: Retail Trade	7	10.4	12.1	65.5
	Division H: Finance, Insurance, And Real Estate	8	11.9	13.8	79.3
	Division I: Services	7	10.4	12.1	91.4
	Division J: Public Administration	5	7.5	8.6	100.0
	Total	58	86.6	100.0	
Missing	-9998.00	9	13.4		
Total		67	100.0		

Sponsorship Activity

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- Proportion of marketing & communications budgets:
  - 2008 – *22.5%* spent on sponsorship
  - 2007 – 15.5% 2006 – 16.7%
- Average number of sponsorships:
  - 2008 – *12 (range 1-200)* 2007 – 10 2006 – 18
- Total sponsorship investment:
  - 2008 – *$4,545, 689* (range $0 to $40,000,000)
  - 2007 - $960,315 (range $0 to $25,000,000)
  - 2006 - $516,769 (range $0 to $12,000,000) – ***VANOC IMPACT***
- In-kind sponsorship investment (average):
  - 2008 – *$456,858*** 2007 - $140,051 2006 - $122,446
- Proportion spent on sponsorship evaluation:
  - 2008 – *6.0%* 2007- -4.5% 2006 - 7.8%
  - Although (new Q) – 71% report evaluating overall SP program

Sponsorship Spending Trends

- THINKING BACK TO 2007:
  - *Significant increase* in sponsorship spending over 2007 is noted from an average of $3,877,205.
  - This accounts for an average increase of ***17.2%*** over 2007
    - Similar increases were found in previous surveys of:
      - *25.7%* in 2007 over 2006 (based on 2008 sample)
      - *10.3%* in 2006 over 2005 (based on 2007 sample)
- THINKING AHEAD TO 2009:
  - 14.3% believe they will spend more - avg of ***9% more***
  - 46.4% believe they will spend less - avg of ***29% less***
    - ***OVERALL – decrease of 24% expected***
  - 39.3% believe they will spend the same amount

In your view, what should be the average of leveraging ratio in all sponsorships?

1) 3:1 or more
2) 2:1
3) 1:1
4) 0.5:1

The CSF's Favourite Number

- Leveraging/Activation
  - Average of $3,245,290

Note: This represents a ratio of .71:1 (leverage:investment) compared to:

- *.46:1 in 2007*
- *.43:1 in 2006*

Less than the 1:1 or greater recommended but much improved – why:

- *Sample of larger sponsors*
- *Increased sophistication of sponsorship*

The most common leveraging tactic is now hosting/hospitality

2008:

1. Hosting/Hospitality
2. Product Sampling
3. Internal Marketing
4. Use of Personalities

2007 & 2006 (combined):

1. Advertising
2. Hosting/Hospitality
3. Co-Promotions
4. Public Relations

Sponsorship Mix

- Average amount invested in (07 & 06 amounts in brackets):
  - Sport* — 48.6% (52%; 54%)
  - Cause Marketing — 12.5% (18%; 17%)
  - Arts — 10.7% (8%; 11%)
  - Entertainment, Tours, Attractions — 6.5% (6%; 13%)
  - Festivals, Fairs & Annual Events — 21.7% (15%; 6%)
- Type of Investment
  - Cash — 58.2% (68%; 65%)
  - In-kind Product — 21.3% (16%; 19%)
  - In-kind Service — 20.5% (16%; 16%)
- On average, they invested in properties (07 in brackets):
  - International — 11.1% (2.7%)
  - National — 26.8% (14.1%)
  - Multi-Provincial — 7.2% (2.9%)
  - Provincial — 19.4% (19.5%)
  - Regional — 14.3% (17.0%)
  - Local/Municipal — 21.0% (40.1%)

Note: IEG (2008) forecasts sport at 69% of spending in North America

Sponsorship Specifics

Largest Sponsorship

- They were typically a sport sponsee (75%) followed by festivals, fairs and events (20%)
- Average size: $1.2M
- Largest reported **sponsorship rights fee was over $7.5M**

Charity in Sponsorship

- Less than 10% of sponsors characterize more than 10% of their sponsorship activities as charitable (35% noted no charity activity)

Agencies

- Sponsors, on average, invested only 8.1% (up considerably from 2.1% in 2007) of their sponsorship budgets through an agency
- Note: 48% of sponsors did NOT use an agency at all
- Those who did use an agency, were more likely to evaluate (19% of budgets) and leverage (ratio .88:1)

RESULTS – SPONSEES

Characteristics of Sample (n=145)

- Each had 33.6 sponsors in 2008 (range: 1-380)
- Human Resources
  - Full-time staff – Avg. 433 (Range: 13-12,000)
  - Full-time staff on sponsorship – Avg. 5 (4.6) (Range: 1-70)
  - Volunteers – Organization: 810 – Sponsorship 11
- Annual Budgets: Mean = $64,000,000

  Note: Six organizations noted a budget of $1 billion+
- Sponsee Reach/Geographic Focus (similar to 07)
  - International: 20%
  - National: 34%
  - Multi-Provincial (i.e. Atlantics): 2%
  - Provincial: 27%
  - Regional: 7%
  - Local: 10%

Sponsee Profile

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Where are they coming from?

Sports	54.6%
Arts	7.2%
Entertainment	5.0%
Festivals, Events	11.7%
Causes	7.5%
Others	14.0%
Total:	n=145

Club	3.2%
Events	14.3%
Athletes	3.1%
Team	6.3%
Community	3.2%
Sport League	9.5%
Player's Union	1.5%
NSOs	**25.4%**
PSOs	**25.4%**
MSOs & Other	**4.5%**
Other (eg. Rodeo)	3.3%

Charity	77%
Cause	15%
Others	8%

Annual Events	64%
Festival	21%
Fair & Other	15%

Notables
*Education – 3 mentions
*Hospital – 2 mentions
*Recreation – 2 mentions

Sponsorship Revenue

- *2.6%* of total budget from sponsorship
  - Comparison: 1.1% in 2007 – and 1.6% 2006
- *$1,680,922* in rights fees received on average
  - a considerable increase from 2007 survey and *$367,628*
  - for this sample, a reported increase (*12%*) from 2007 ($1,490,426)
- THINKING AHEAD TO 2009:
  - 39% believe they will receive more in 2008
    - The avg. expected increase is 25%
  - 21% believe they will receive less
    - The avg. expected decrease is 20%
  - 50% expect no change
- Sources of Revenue
  - Cash 67% - Inkind Product 21% - Inkind Services 12%

Value In-Kind

Value of in-kind received in 2008 = *$543,813* (*$142,718* in 07)

Dollar value	% of respondents
0	5%
1-20,000	27%
20,001-40,000	14%
40,001-60,000	12%
60,001-100,000	11%
100,001-200,000	6%
200,001-300,000	6%
300,001-400,000	4%
400,001-999,000	7%
1 million +	8%

69%

Two organizations reporting over $5M

Sponsee Strategy

- **Agency Investment**
  - Sponsorship revenues re-invested through agencies: 3.2% (range 0%-25%)
  - Sponsorship revenues received via an agency: 6.91%
  - Significant correlation ($r=.732$, $p<.01$) between agency use and total revenues received from sponsorship
- **Leveraging/Activation/Servicing**
  - Average spend of 14.2% reported (13 respondents noted > 25%)
  - 59% spend more than 10% of revenues on activation
  - 22% do not leverage (was 21% in 07)
  - Most common tactics for leveraging:
    - 2008: Hospitality & Product Sampling
    - 2007: Hospitality & Advertising
    - 2006: Product Sampling & Hospitality

RESULTS – AGENCIES

Characteristics of Sample (n=67)

- Agency Focus

Promotions Agencies	5
Sponsorship Agencies	22
PR Agencies	4
Event Mngt Agencies	7
Advertising Agencies	8
Market Research Agencies	5
Integrated Marketing Agencies/Consultancies	8
Others (1 mention each)	2

- Agency Size
  - On average each agency has 49 (range: 1-600) full-time staff, of whom 4 (4.3) work primarily in sponsorship (range: 1-17)
- Agency Reach: International (34% - up from 15%), National 44% (50%), Provincial 13% (12%), Regional/Local 10% (18%)

Agency Billing for Sponsorship

- Average billings *$1,141,589* in 2008 ($143k/client)
  - A significant increase from 2007 ($874,473 or $155k/client)
- Does this change hold for this sample (reporting back)?
  - In 2007, this sample reported that annual billing was *$802,297*
  - 2008 is a *42% increase* over 2007
- What about the future?
  - 31% expect an increase
    - The average expected increase is 47%
  - 35% expect a decrease
    - The average expected decrease is 24%
  - 34% do not expect their billing to change

Agency Sponsorship Billing by Industry

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Allocation of Overall Billing Related to Sponsorship

(07 in brackets)

Sport	26% (37%)
Cause	11% (25%)
Festival, Fairs or Annual Events	15% (12%)
Entertainment, Tour or attractions	10% (9%)
Arts	13% (5%)
Others*	25% (12%)

*Others include items such as conference sponsorship, consulting, professional associations, and venue naming rights

*Total proportion of billings from sponsorship continues to increase over time: ***55.9%*** in 2008 vs. 47.1% in 2007 vs. 45.8% in 2006

Agency-Based Sponsorship Activity

- Number of Sponsorship Clients
  - On average, each agency had 19.9 clients (range 0 to 150)
- Allocation of Sponsorship Work
  - Most common now 'sponsorship sales' (was leveraging in 07)
- Leveraging
  - On average, agencies' clients leveraged each sponsorship with an additional investment of $1.7M or an average of $214,938 per client. Thus, average ratio was 1.5:1
- Evaluation
  - In 2008, *74.9%* of sponsorships worked on were evaluated, a significant increase over 2007 at 67% and 2006 at 48%

RESULTS – SPONSORSHIP INDUSTRY SIZE ESTIMATION

Estimation: Sponsorship Industry Size

- Based on our sampling process and conservative assumptions, we estimate that ***$1.39 BILLION*** was the industry size in Canada in 2008.
  - This is an incrcrease from the previous iterations:
    - 2007 – estimate was $1.22 BILLION
    - 2006 – estimate was $1.11 BILLION
  - This number represents a *14% increase* from 2007 and a 25% increase from 2006.
  - However, when adopting the figures from the forecasted decrease for 2009, the expected expenditure drops to ***$1.19 BILLION.*** Given the influence of the large sponsors on keeping this up, a further decrease or flattening off could be expected, pending the economy, post VANOC.

Comparison to Other Markets

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Global Spending	2007: US$37.7 billion (IEG, 2007) 2008: US$43.5 billion (IEG, 2008)
North America	2007: US$14.91 billion (IEG, 2007) 2008: US$16.78 billion (IEG, 2008)
Europe	2007: US$11.7 billion (IEG, 2007) 2008: US$10.6 billion (IEG, 2008)
Asian Pacific	2007: US$7.6 billion (IEG, 2007) 2008: US$9.5 billion (IEG, 2008)
Central & South America	2007: US$3.0 billion (IEG, 2007) 2008: US$3.5 billion (IEG, 2008)
UK	2003: 783 million Pounds (Mintel, 2004)

Trends in Sponsorship

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2008 Most Important Issues Today
- Evaluation/ROI
- Communication with support from sponsor, sponsee, and/or agency partner(s)
- Leveraging/Activating Effectively

Strategic → ***Financial***

Most Important Issues in 10 Years
- ROI (linkage to sales)
- Ambush and Clutter*
- True Understanding of sponsorship

2009 Most Important Issues Today
- Value, Uniqueness, Measuring Value in Real Impact
- Return-On-Investment and Return-On-Objectives
- Sales, Client Fit, Activation

Most Important Issues in 10 Years
- Economic Downturn, Economy,
- ROI (measurement) and link to sales
- Environment

* Various external considerations: VANOC, economy, Bill C-47, etc.

Do you agree with these views on sponsorship's future?

1) Yes
2) No

IMAGINE CANADA & NONPROFIT SPONSORSHIP

Imagine Canada

Nonprofit Sector Study

Method

- Telephone bilingual survey (2008)
- Ipsos Reid
- Purchased list
- 2,181 businesses surveyed (representative)
  - 1,500 (weighted sample)
  - Stratified and weighted
    - Region
    - Size
    - Industry
- 93 companies sampled with revenues over $25 million
  - Partnerships with Council of CEOs, Imagine's Caring Company Program

By Position

Respondents

- CEO / President 13%
- Director or VP 42%
- Manager 14%

Legal Status

- 91% private companies

Industry

- Professional services (14%)
- Finance and insurance (10%)
- Wholesale Trade (10%)

What % of total corporate contributions to charities do you think sponsorship comprises?

1) 75% or more
2) 50%-74%
3) 26%-49%
4) 25% or less

SEVEN QUESTIONS ABOUT CHARITABLE SPONSORSHIPS

The Opportunity

- **1.** Why does the nonprofit sector present an opportunity?

The Landscape

- **2.** How much support does the corporate sector provide to the charitable sector?
- **3.** What is the amount of corporate sponsorships to nonprofits?

Your Competition

- **4.** What is the competition doing?
- **5.** Where does the money go?

The Implementation

- **6.** How do I maximize the benefits of sponsorships?
- **7.** What's happening next?

THE OPPORTUNITY

1. Why does the nonprofit sector in Canada present an opportunity?

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- Represents ***$79 Billion*** in GDP
  - More than 8% of the economy
- 2 million full-time equivalent workers
  - 1.5 million paid and 549,000 volunteers)
- 85% of the population donates
- 45% of the population volunteers

Sources: Imagine Canada/Johns Hopkins Study of nonprofit sector, 2003, 2004 Canada Survey of Giving, Volunteering, and Participating; 2003 National Survey of nonprofit and voluntary organizations

** All data are either from one of these sources or the current study.*

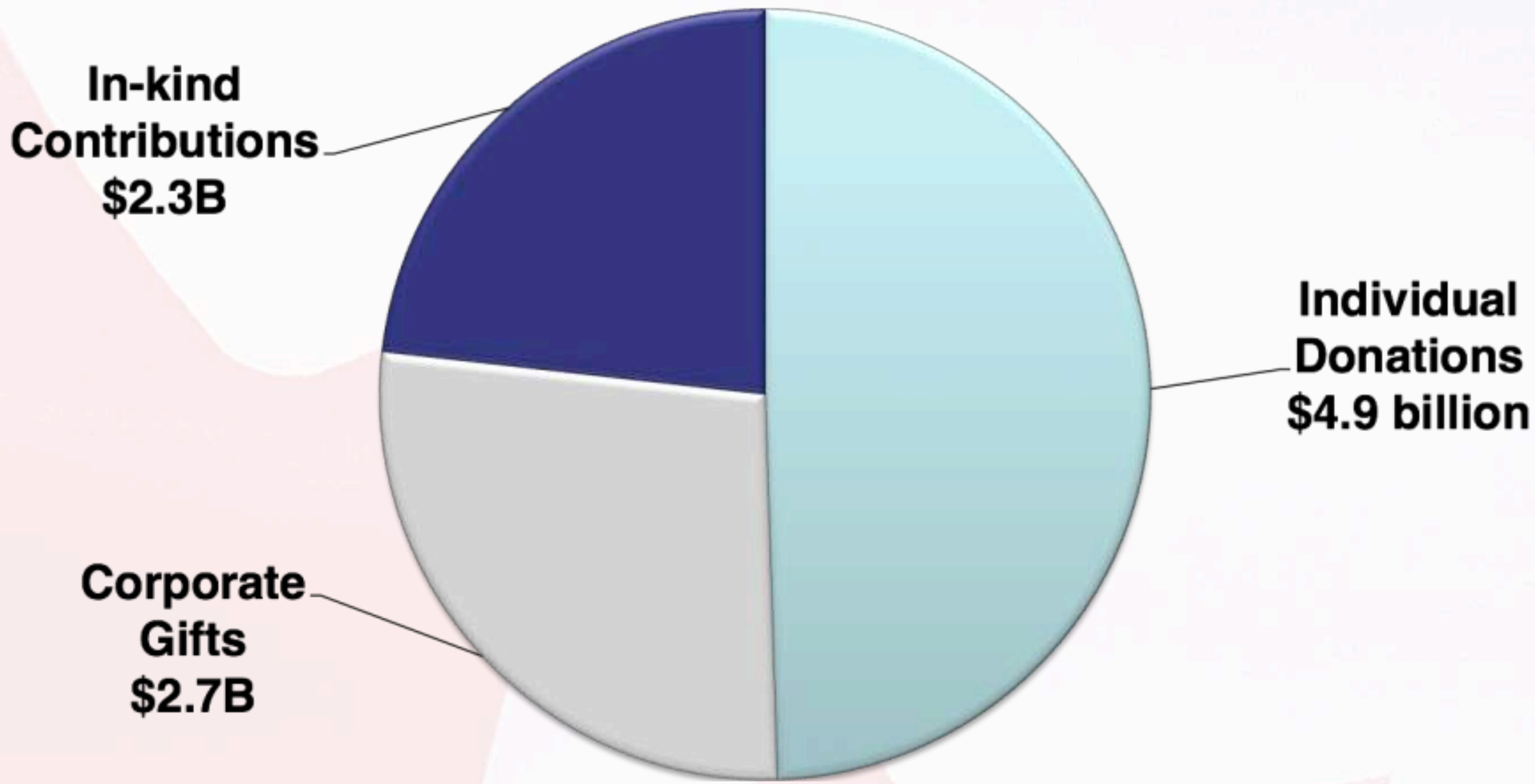
THE LANDSCAPE

2. How much support does the corporate sector provide to the charitable sector?

- **$2.8 billion** directly ($100 million to religion)
- **$2.3 billion** in-kind (combines individual and corporate in-kind gifts)
- Compare to **$1.39 billion** in sponsorships (Landscape study)
- **But:**
  - Matching grants
  - Employee time
  - Earned income
  - Exposure

Imagine Canada, 2003

Total Non-Religious Gifts to Charities



Imagine Canada, 2003; 2004

THE LANDSCAPE

Large Corporations (n=93) Donate…

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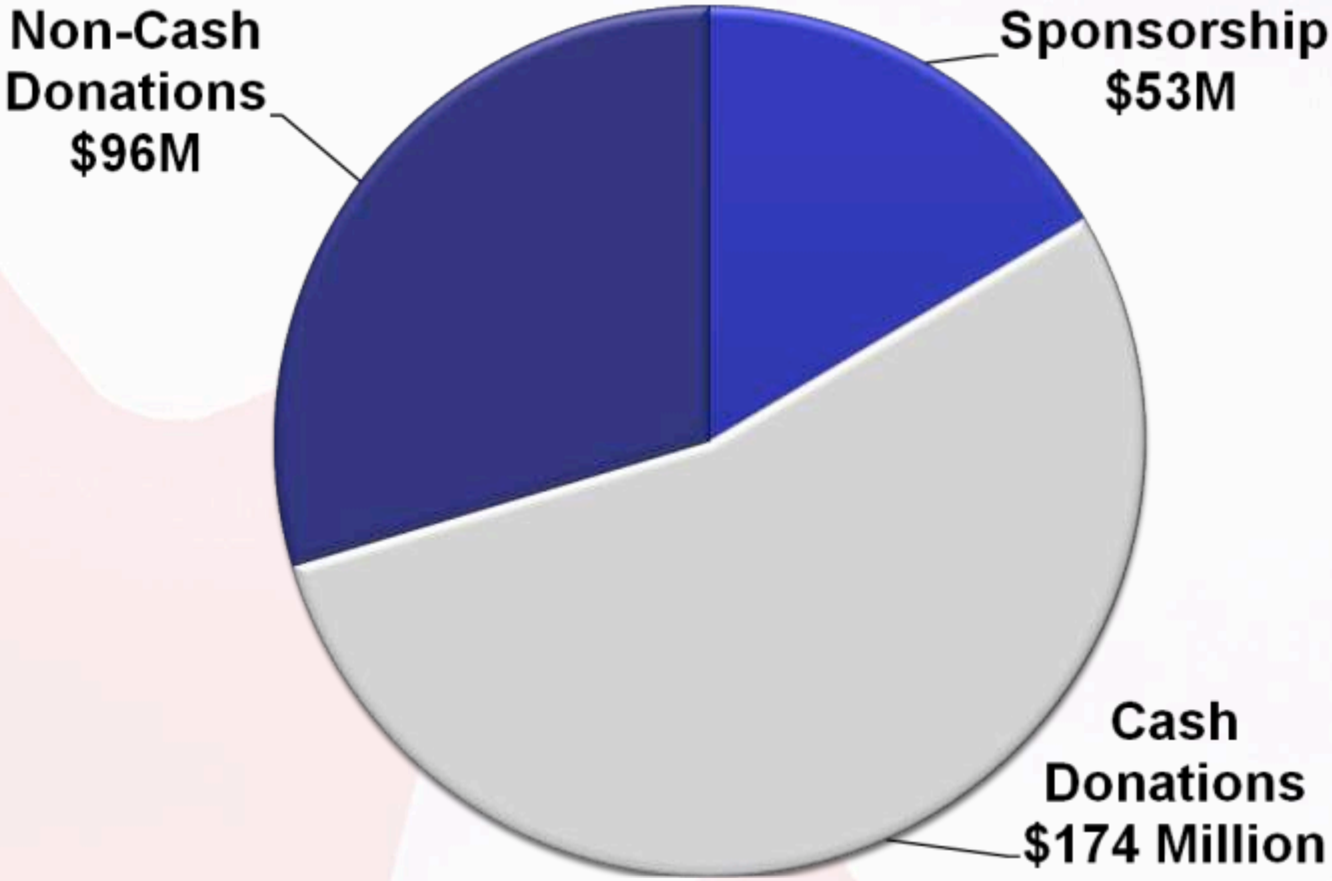
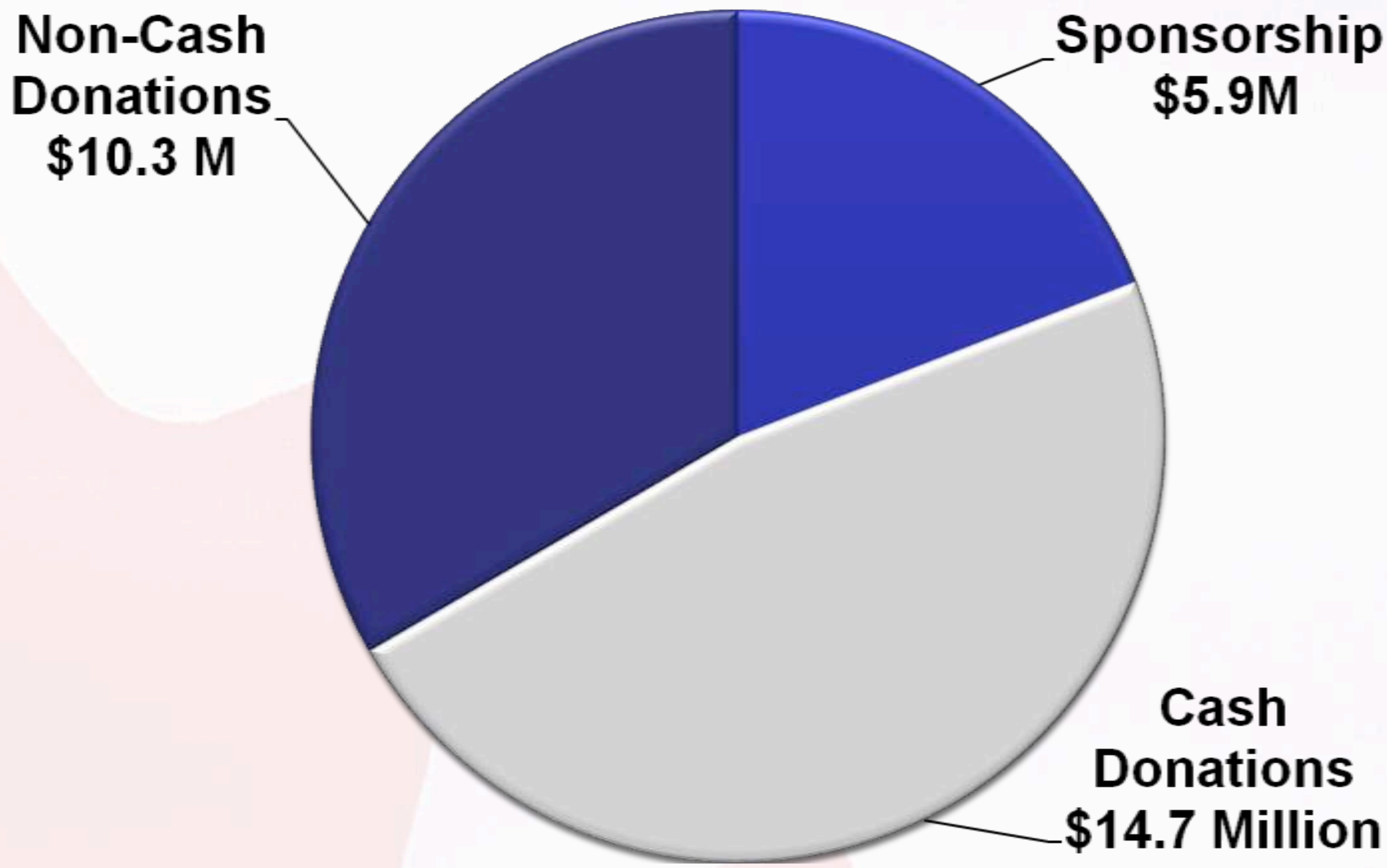


Sponsorships represent 31% of Cash Donations

Small Corporations (n=1500) Donate…



Sponsorships represent 40% of Cash Donations

3. How much sponsorship goes to nonprofits?

- In 2008, corporate cash contributions were approximately $2.3 billion
  - And sponsorships were 31% of the amount of cash donations

- Then, nonprofit and charitable sponsorships can be estimated to be: **$713 million**

YOUR COMPETITION

4. WHAT ARE THEY DOING?

Contributions

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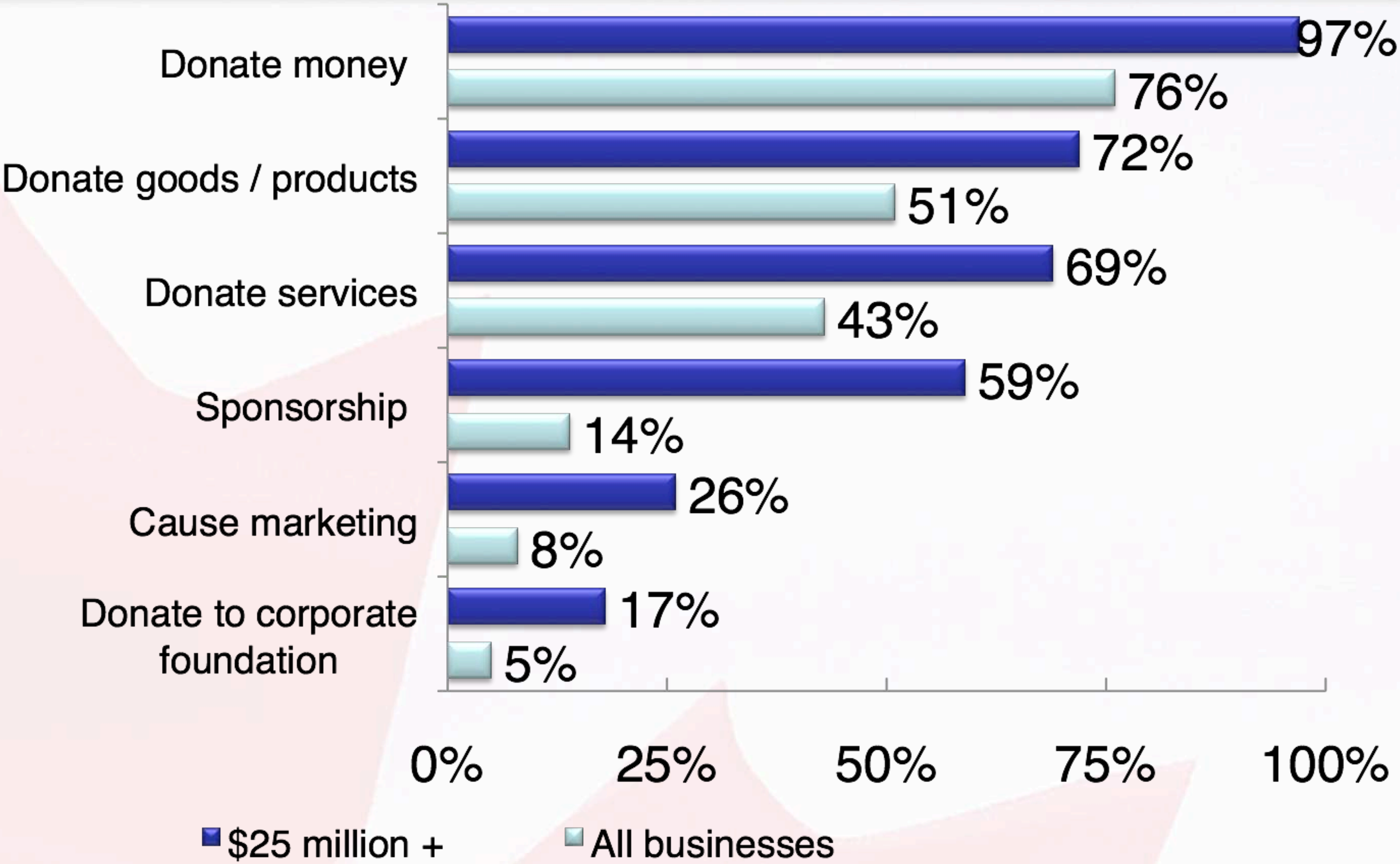
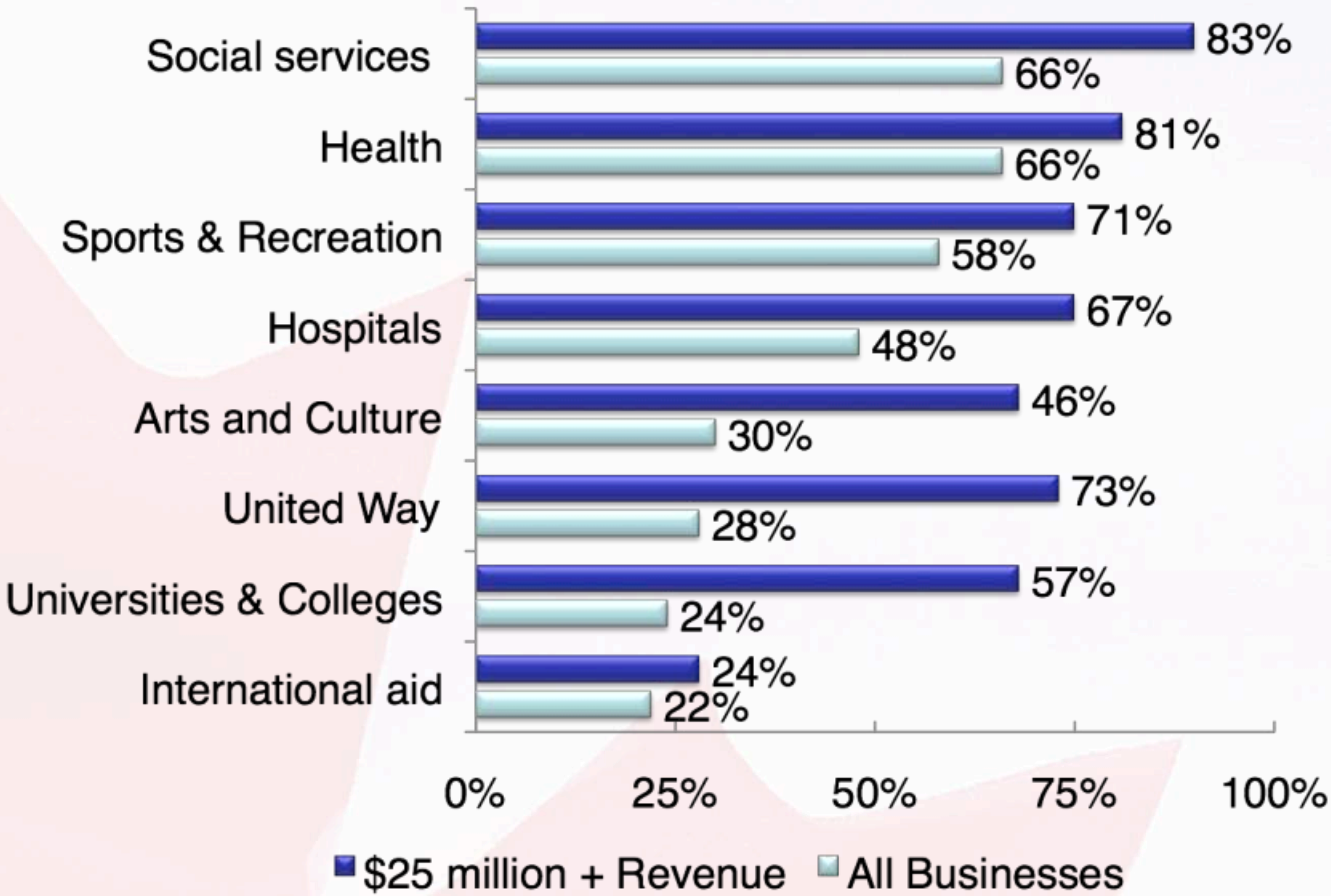


5. Where do the contributions go?



THE IMPLEMENTATION

6. HOW DO I MAXIMZE SPONSORSHIP BENEFITS?

A Different Lens on Activation

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211 companies (14% of the sample) invest in sponsorship:

- **193 (91%)** donated **cash**
- **126 (60%)** donated **goods**
- **112 (53%)** supported **employee volunteering**
- **107 (51%)** donated **services**
- **59 (28%)** used **cause marketing**

INTEGRATE

Does you organization quantitatively evaluate the outcome of your charitable sponsorships?

1) Yes, for the sponsor only
2) Yes, for the charity only
3) Yes, for both the business and the charity
4) Unsure or Not Applicable

Making Contributions More Effective

All Businesses

22% have regular ongoing programs for contributions

13% measure the benefits of their community contributions

8% have a written policy

Large Corporations

79% have regular ongoing programs for contributions

27% measure the benefits of their community contributions

39% have a written policy

In the recession, relative to other types of sponsorships, do you think companies will:

1) **Invest more** of their sponsorship $$ in charities
2) **Invest less** of their sponsorship $$ in charities
3) Relatively **unchanged**

7. What can sponsors, sponsees and agencies take away?

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- Strategic use of money
  - “Why” is it being done
- More requests
- Fewer causes
- Integration of promotion and philanthropy
- Learning to measure
- Prioritizing stakeholders
- Employee engagement

SPONSORSHIP STORIES

Story of Sponsor

- 50 employees work more than 25% of their time on sponsorship
- 12 sponsorships, 5 of which were title sponsorships
    - National company (in all provinces) with sales of over $1B
- Invests about $2M annually, or about 30% of our marketing budget
    - 50% on international properties and 50% on national properties
    - 10% was invested through an agency
    - Our largest sponsorship was $500,000 (sport)
- It is “very important” that one of our sponsorships be a charitable cause
- Last year, we spent about $2M on sponsorship
- Next year, we expect to spend $800,000 more
- Only $30k of our sponsorship investment is in-kind
- Spend approx. $6M on leveraging (3:1) – hosting/hospitality most common
- 30% of our overall sponsorship budget was spent on sponsorship evaluation
- 50% of our sponsorship is spent on mega-sponsees
- By sponsee type: we’re 25% cause and 75% sport

Technology Nonprofit Sponsorship

Microsoft donates products and service expertise

Microsoft → techsoup CANADA

Story of a Sponsee

- 65 sponsors in 2008
- 200 full-time staff, 25,000 volunteers
- 12 staff work primarily on sponsorship
- International Focus
- Sponsorship revenue (2008): $11 million (20% increase over 2007) plus an additional $2 million in in-kind contributions
  - 10% of revenues obtained by an agency
- 15% of sponsorship revenues invested in leveraging: $1.65 M
  - Main spend is on hospitality, international TV, co-promotions, events, & advertising
- Expectation for 2009: no change

Activating with Employees

Manulife

Story of an Agency

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- Sponsorship agency (5 full-time & 5 part-time staff)
- 2008 Sponsorship Billing: $1,000,000 (6% growth over 2007) + $25,000 in-kind
- Expectations for 2009: no change
- Source: Sport (80%), Cause (10%), Festivals (10%)
- Reach: National
- Number of sponsorship clients: 8
- Number of sponsorships: 12
- Main area of work: Activation (65%), Media (15%)
- Clients spend $8,000,000 total on activation, 200% of 2007
- 50% of sponsorships worked on were evaluated

SUMMARY

Key Themes

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1. Growth of Sponsorship - considerable in 2008 to $1.39B, combined with increase sophistication in its use (evaluation, activation)
2. Immense opportunities in not-for-profit sector for sponsors, sponsees and agencies ($713M)
3. Importance of External Influences: Vancouver 2010 & Economic Crisis
4. Varied Views on Future of Sponsorship: Sponsors express decline, Sponsees expect growth, Agencies forecast ‘flat’
5. Agency Use - continues to demonstrate a sophisticated approach
6. Leveraging has increased to .71:1
7. “Lots” of positives going on (stories, evidence)

iSM

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We would appeciate your input and ideas.

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