

# CSLS

## Canadian Sponsorship Landscape Study

Dr. Norm O'Reilly & Dr. Benoit Séguin University of Ottawa 2011



uOttawa

Faculté des sciences de la santé  
Faculty of Health Sciences



Sponsorship Marketing  
Council of Canada  
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sur la commandite



# EXECUTIVE SUMMARY

## About

The current edition of the Canadian Sponsorship Landscape Study marks the fifth annual version since the study began in 2007. The content of the study arose from needs expressed by key industry experts who participated in the 2005 and 2006 Canadian Sponsorship Forums (CSF). The study draws on both academic and industry resources in order to provide a study that is extremely relevant, highly ethical and provides outstanding sponsorship expertise. Over the years, the study has garnered significant support, including a partnership with the Sponsorship Marketing Council of Canada (SMCC), a pivotal industry organization. Initial data for this 5th Annual CSLS was collected, analyzed and presented at the SMCC Conference in Toronto on April 7, 2011. The survey remained live and additional findings were presented at the 2011 CSF on June 11, 2011 at the F1 Grand Prix in Montreal, Quebec.

YEAR	CANADIAN SPONSORSHIP FORUM	CSLS
2007	Toronto International Film Festival, Toronto, ON	1st Annual CSLS
2008	IIHF World Hockey Championships, Halifax, NS	2nd Annual CSLS
2009	Quebec Winter Carnival, Quebec, QC	3rd Annual CSLS
2010	Paralympic Winter Games, Whistler, BC	4th Annual CSLS
2011	F1 Grand Prix, Montreal, QC	5th Annual CSLS

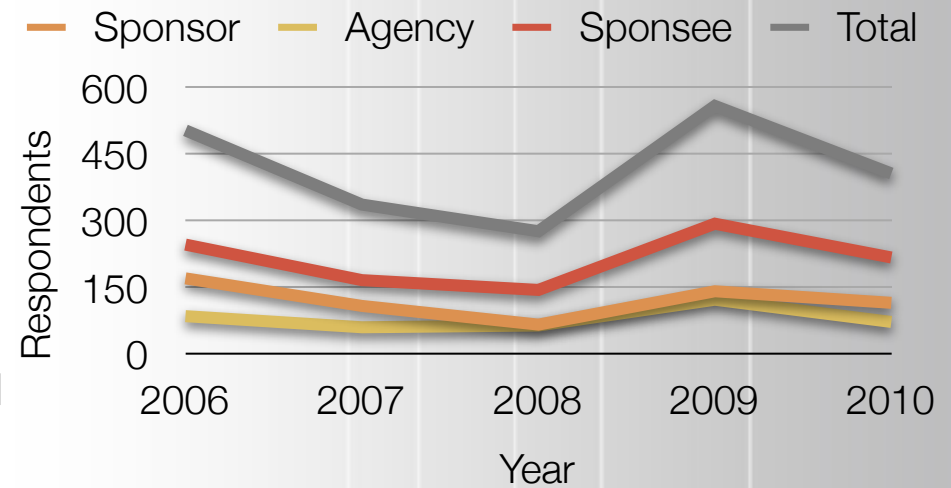
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## Methodology

The data that is collected is done online through a secure website and allows for the ethical and anonymous treatment of data, allowing for the most genuine data. The current CSLS was based on a data collection procedure developed over each of the previous years of the study. The study comprises three bilingual surveys: one for each of sponsors, sponsees and agencies. Surveys for sponsors, sponsees and agencies were unique, although there were several similar questions. The 2011 study included two new themes. First, there was a special section on sponsorship relating to the entertainment industry. Secondly, there was an increase in the inclusion of open-ended questions in the study as well as subsequent analysis, allowing for significant additional insight into sponsorship in Canada.

## Responses

As this is the fifth year that Canadian sponsorship data has been collected and reported on, the study is strengthening and the findings are becoming more robust, allowing for key insights into the industry. Over the past five years, the study has been strengthened through strong, supportive partnerships with SMCC, IMI and the Canadian Sponsorship Forum. Continued participation has allowed for longitudinal data and trend analysis, strong and representative response rates as well as demonstrated industry adoption.



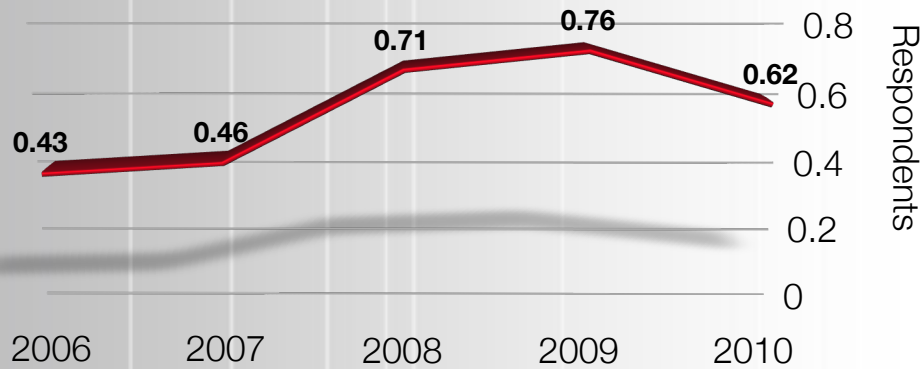
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## Five Years of Results and Analysis

This report contains a vast compilation of these valuable findings, including:

- ▶ A decline in activation spending
- ▶ Spending on evaluation was the lowest since the start of the CSLS five years ago
- ▶ The size of the Canadian sponsorship industry has grown yearly since the 1st Annual CSLS, reaching approximately \$1.5 billion in 2010.

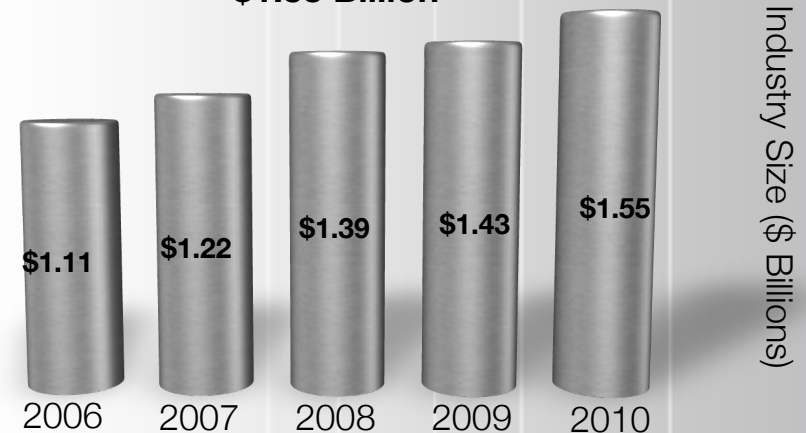
### Decrease in Sponsorship Activation



### Decrease in Sponsorship Evaluation



### The estimated industry size in Canada is \$1.55 Billion



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## 2010 Results and Analysis

The results of the CSLS were analyzed and 19 key themes were revealed. These themes were grouped into three broader categories.

### Environment

- 1.1 The impact from the 2010 Olympic Games is over.
- 1.2 A sponsorship budget should be established year round.
- 1.3 Sponsorship mixes are becoming more diverse.
- 1.4 Entertainment sponsorship should not be forgotten.
- 1.5 Sponsors, sponsees and agencies currently face many challenges.
- 1.6 Sponsors, sponsees and agencies identify many challenges for the future.

### Strategic Findings

- 2.1 Activation declined in 2010.
- 2.2 Investment in activation was diverse.
- 2.3 Evaluation declined in 2010.
- 2.4 Value-in-kind sponsorship declined in 2010.
- 2.5 Not-for-profit sponsors should not be overlooked.
- 2.6 For-profit sponsees are valuable.
- 2.7 Sponsors continue to be underserved by sponsees.

### Opportunities

- 3.1 Awareness continues to be an important component that sponsors desire in a sponsorship proposal.
- 3.2 There was a shift in renewal focus from marketing to activation.
- 3.3 Sponsors look for perception, value and alignment when renewing sponsorships.
- 3.4 Sponsors, sponsees and agencies have an optimistic forecast.
- 3.5 Sponsors, sponsees and agencies are using a variety of methods to capitalize on digital media.
- 3.6 The overall size of the sponsorship industry in Canada is growing.