14th ANNUAL

CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

SPONSORSHIP MARKETING COUNCIL CANADA

IMI

Lead Author: DR. NORM O'REILLY

ACKNOWLEDGEMENTS: CSLS PARTNERS

IMI International's unique brand of research and consulting focuses on ensuring clients maximize the financial outcome of their marketing expenditure.

The Sponsorship Marketing Council of Canada aims to help brand marketers, agency partners and sponsorship sales teams to drive advancement in the field of sponsorship marketing.

Born and raised in Toronto, **T1** takes a thinking first approach to everything we do. It's how we deliver bold ideas that build brands, empower people, deliver results, and help shape the future.

IMI

SPONSORSHIP MARKETING COUNCIL CANADA

ACKNOWLEDGEMENTS: RESPONDENTS & “SHARERS”

THANK YOU!

MERCI !

A comprehensive industry study like the CSLS is only possible with the support of partners and industry professionals willing to respond and share the study.

We sincerely thank all who contributed.

CSLS
CANADIAN SPONSORSHIP LANDSCAPE STUDY

Agenda

14th Annual

TODAY'S PRESENTATION

14th Annual CSLS

Results
2019

Analysis
2006-2019

Industry
Trends, Size & Future

Special Topics

Qualitative Deep Dive
1. Sponsor Objectives
2. The Olympic Games not in Canada
3. Agency Expertise

Reality Check
Drawing on other sources to put 2019 in perspective

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CANADIAN SPONSORSHIP LANDSCAPE STUDY

History

14th Annual

2007

Toronto International Film Festival, Toronto

2008

World Hockey Championships, Halifax

2009

Quebec Winter Carnival, Quebec

2010

Paralympics, Vancouver

2011

Formula 1, Montreal

2012

Just for Laughs, Montreal

2013

MasterCard Memorial Cup, Saskatoon

2014

RBC Bluesfest, Ottawa

2015

FIFA Women's World Cup, Edmonton

2016

NBA All-Star, Toronto

2017

JUNOS, Ottawa

2018

T1 Speaker Series, Toronto

2019

SickKids Foundation, Toronto

2020

SponsorshipX Virtual Series

And...

CSLS Landmarks & Breakthroughs

2007 Activation Ratio: 0.43	First ever validation that activation in Canadian sponsorship was significantly behind other major countries of the world.
2008-2010 Recession Proof	As the 'Great Recession' hit many countries, including Canada, CSLS results showed sponsorship kept growing.
2013 Festivalization	CSLS authors coined the term "festivalization" as the festival category took similar proportion of sponsorship investment in Canada from 2011 to 2013.
2014 & 2018 Pro Sport Renaissances	The proportion of sponsorship spend dedicated to pro sport spikes in 2014 and again in 2018.
2018 $3 Billion	Total sponsor spend (rights fees plus activation) exceeds $3 billion for the first time. More than double the first year of CSLS.

Global & National Influencers Timeline

2015

Canada hosts Pan Am and Parapan Am Games

Canadian artists dominate pop music charts: Drake, The Weeknd, Justin Bieber

FIFA Women's World Cup hosted in Edmonton, AB

Instagram Ads launched globally

Same-sex marriage legalized in USA

2016

Canada hosts NBA All-Stars Game and World Cup of Hockey in Toronto, ON

Wildfires ravage Fort McMurray, AB

Colin Kaepernick kneels in protest of racial injustice

Instagram rolls-out major algorithm changes and business analytics tools

Donald Trump elected 45th President of USA

UK votes Brexit

2017

Canadian census shows strongest population growth among all G7 countries

Canada celebrates 150th birthday

Instagram integrates with e-commerce

Volkswagon pays $4.3 billion fine in emissions cheating scandal

Wikileaks claims widespread CIA surveillance programs

TikTok launches in markets outside of China

2018

Team Canada celebrates IIHF World Junior Championship title in Buffalo, NY

Canadian Sponsorship total industry spend of $2.98 billion

FIFA World Cup draws global audience of 3.5 billion viewers

Cambridge Analytica connected to digital propaganda influence in US elections and Brexit

SpaceX launches Falcon Heavy

2019

Bianca Andreescu becomes Canada's first-ever grand slam singles champion

Government of Canada pledges funding to reach $1.4B annually by 2023 for gender equality

Toronto Raptors win 2019 NBA Championships

Consumer spending on apps approaches $90 billion; Tinder ranked #1 for in-app spend

Canada-United States-Mexico Agreement (CUSMA) is signed

2020

Bank of Canada provides $200 billion of liquidity to financial institutions

WE Charity controversy

COVID-19 causes global pandemic

E-Sports projects growth in 2020 to surpass $1 billion

CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

Results

14th Annual

The Story of 2019:

A Year to Remember in Canadian Sponsorship


1. The Study
Background
2. The Sample
Stakeholders
3. Industry Data
Size & Scope
4. Results #1
Strategy
5. Results #2
The Deal
6. Results #3
Activation
7. Results #4
Servicing
8. Results #5
Evaluation
9. Discussion
So What?

1. The Study

Background

THE STUDY: *CSLS 101*

Origin

Need
Share
Bilingual
Canadian

Perspective

Spend
Revenue
Billing

Process

Phone
Online
Attribution

Analysis

Themes
Comparative
Modelling

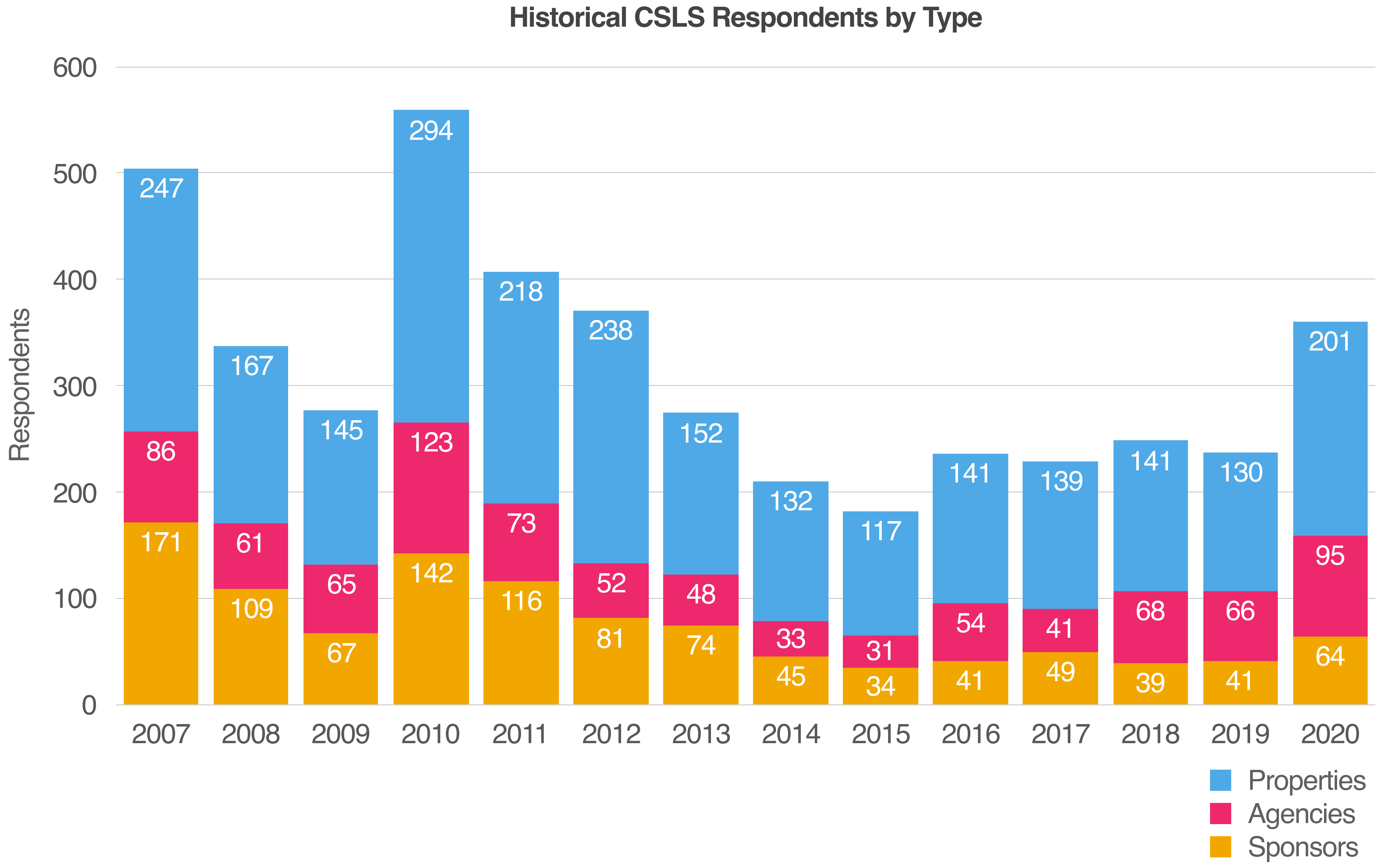
Design

Longitudinal
Triangulation
Deep Dives
Trends

2. The Sample

Stakeholders

RESPONDENTS



DATA

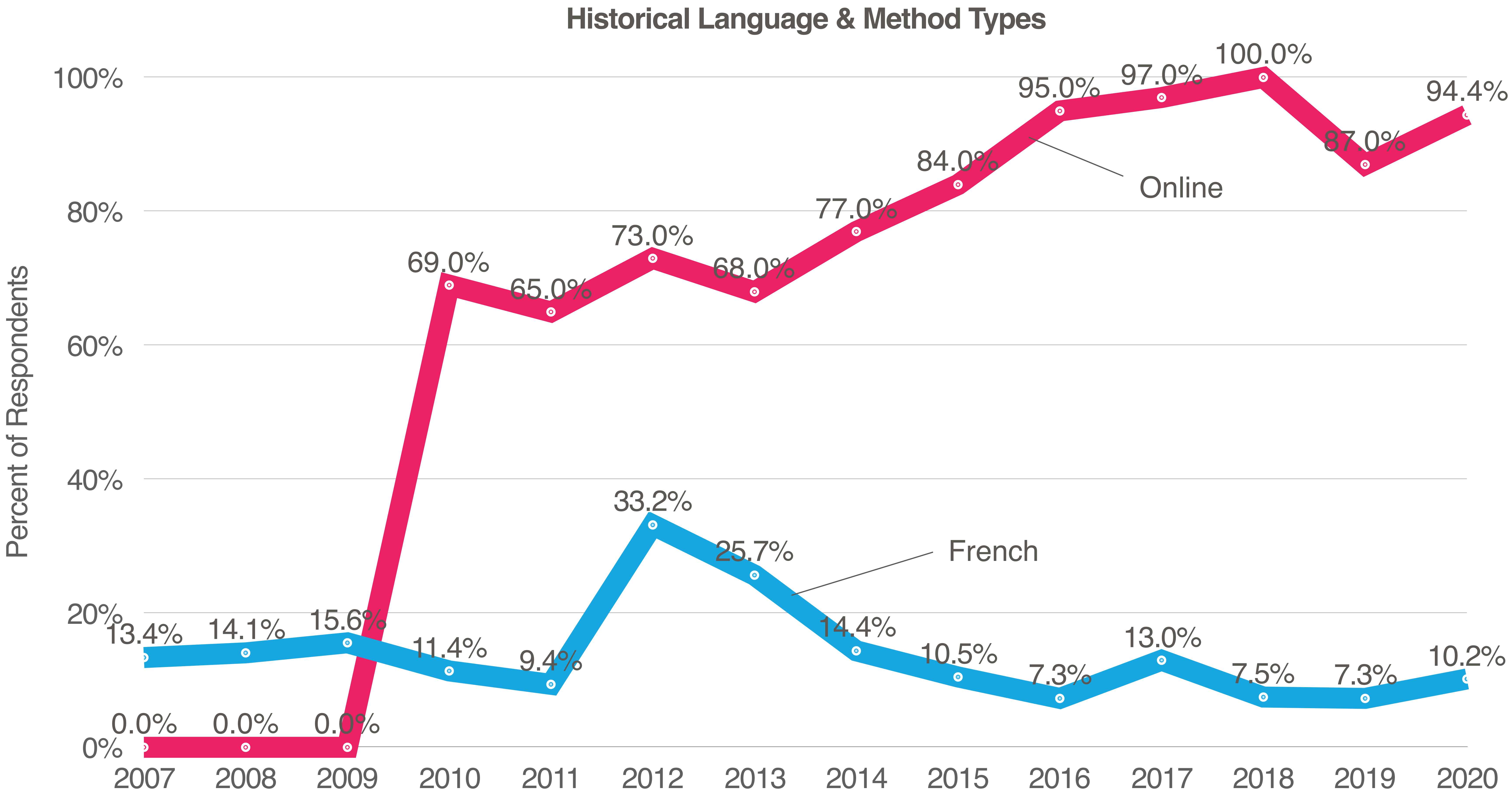
4,435
Total Respondents

NOTE

After going online in 2010, the number of respondents continually declined until a survey redesign in 2016.

2020 best response in 8 years.

SURVEY PARTICULARS



DATA

14 Years
Language &
Method of Response

NOTE

French rates rose around conference in Montreal; lower since.

Online at 100% for first time in 2018, but some offline in 2019 & 2020.

TYPICAL SPONSOR IN 2019

A SPONSOR (2019)

n=64

Industry

- Sample includes representation from all Industry Canada categories
- Median annual sales of $300M
- HQ: ON 52%, QC 15%, AB 15%, BC 10%

Internal Details

- Sponsorship decisions balanced throughout the year
- Sponsorship is housed in:
  - Marketing/Communications: 85%
  - PR: 15%
  - Community Relations: 5%

Money Mix

- 61% For Profit
- 77.9% Cash vs VIK
- Targeting (by $'s):
  - Female: 19.3%
  - Male: 35.6%
  - No Specific Target: 45.1%
- Expected increased investment in female targeted spend next year
  - 1.9%
- Targeting (by # of deals)
  - Female: 9.5 deal (0 to 100)
  - Male: 15.5 deal (0 to 200)

Sponsorship Spend

- $6.6M average rights fee
  - Range: $10k to $30M
- Largest Sponsorship
  - Avg: $1.6M
  - Range: $10k to $25M
- Portfolio: 2 to 500 deals
  - Mean: 55.4 deals
  - Median: 9.5 deals

Demographic

- Decision Maker:
  - 65% Male / 35% Female
- 95% Director level or above
  - 25% CEO/President/CMO
  - 30% VP

TYPICAL PROPERTY IN 2019

Decision-Making

- Decision-maker
  - 49.5% M, 45.2% F, 5.4% Other
  - 11.8% CEO; 25.8% VP; 50.3% Director

Property Reach

- 27.7% International
- 29.8% Canada
- 19.1% Multi-Provincial/Provincial
- 13.8% Regional
- 9.6% Local

A PROPERTY (2019)

n=201

Revenue

- $3.89M received (average)
  - Range: $10k to $33M
- Largest sponsor
  - Average: $2.22M
    - Range: $10k to $50M
  - Source:
    - Retail 25.5%
    - Finance 22.3%
    - Communications 11.7%
- Mix: 73.8% cash & 26.2%
- Revenue Source
  - 89.8% For-Profit Sponsor
  - 10.2% NFP Sponsor

Sponsor Mix

- Number of sponsors
  - Mean: 39.2
  - Median: 19
  - Range 2 to 275
- Demographic Focus:
  - Adults: 39.4%
  - Other: 26.6%
  - Men and/or Boys: 17.0%
  - Children and youth: 13.8%
  - Women and/or Girls: 1.6%

Demographic

- Budget: $4M (median)
- HQ: 62.4% ON / 16.1% AB
- 3 staff working primarily on sponsorship (median)

TYPICAL AGENCY IN 2019

AN AGENCY (2019)

n=95

Decision-Maker

- CEO/President: 55.2%; VP 34.2%
- Gender: 55.3% M; 39.5% F; 5.3% Other

HQ & Reach

- HQ: 71.1% Ontario
- HQ: 13.1% Quebec
- Reach:
  - 31.6% International
  - 57.9% National
  - 5.3% Provincial

Client Mix

- Client Type
  - Sponsor: 45.3%
  - Property: 44.1%
  - Agency: 10.6%
- Focus of Billings
  - Festivals: 24.5%
  - Pro Sport: 18.8%
  - Olympic: 18.5%
- Mission
  - For-profit - 62.9%
  - NFP - 37.1%

Sponsorship Billings

- $3.9M average billings ($10k to $32M)
- Sponsorship: 55.7% of total billings
- Sponsorships worked on: 21.2 (average)
- Areas of Work
  - Sales - 34.3% of Billings
  - Activation - 13.5% of Billings
  - Evaluation - 12.3% of Billings
  - Research - 8.7% of Billings
  - Consulting - 8.4% of Billings
  - Event/Staff Management - 7.8% of Billings
  - Contracts/Negotiations - 6.5% of Billings

Focus of Billings

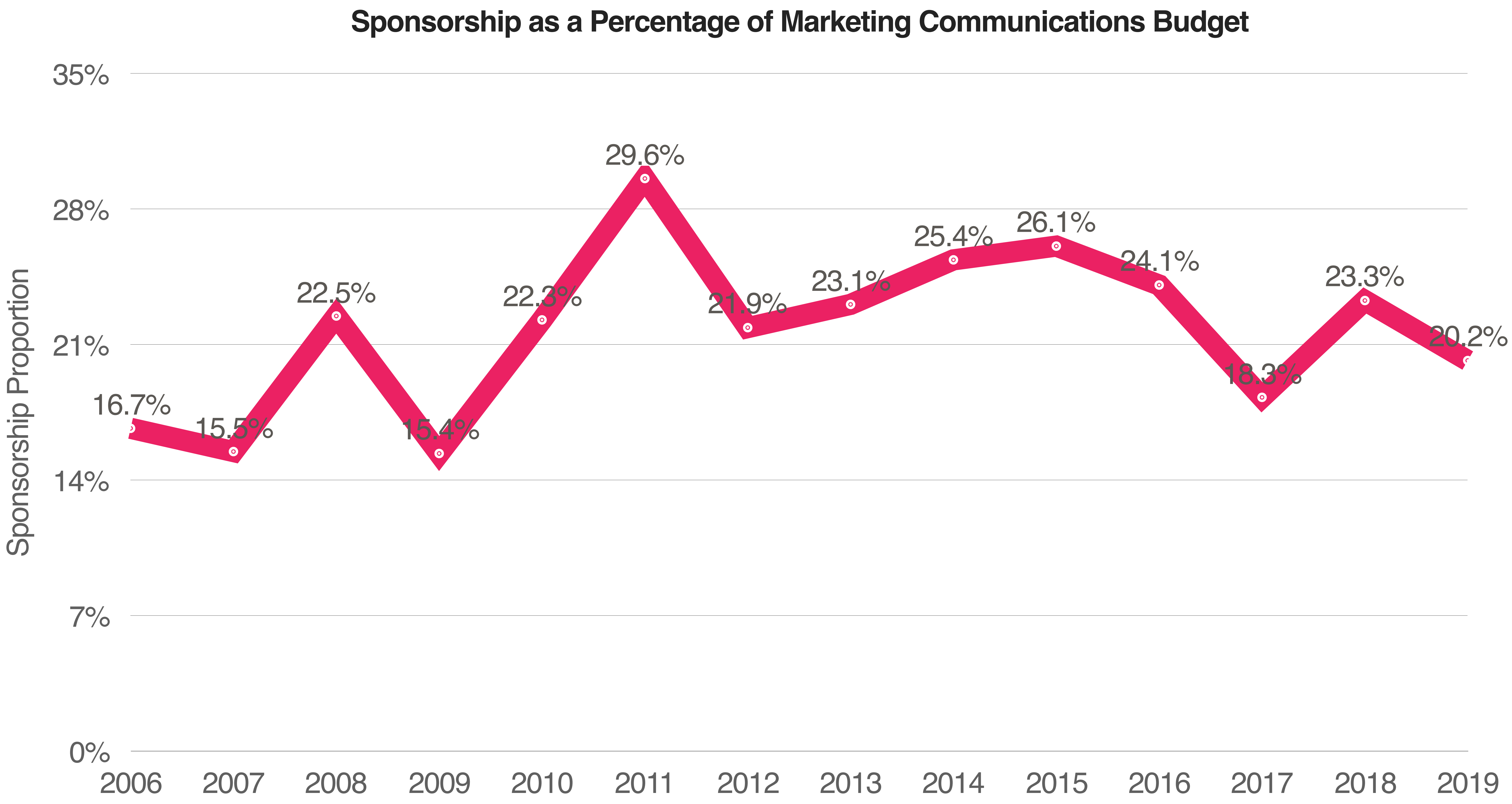
- Gender:
  - M 29%; F 21%
- Largest Client
  - Sponsor: 39%
  - Property 61%

NOTE **54%** described themselves as a “sponsorship agency”

3. Industry Data

Size & Scope

PROPORTION OF MARCOM BUDGET



DATA

20.2%
In 2019

NOTE

Among those organizations that use sponsorship, just over **1 in 5 MarCom $'s** are spent on sponsorship.

CANADIAN INDUSTRY SIZE

DATA

$1.99B

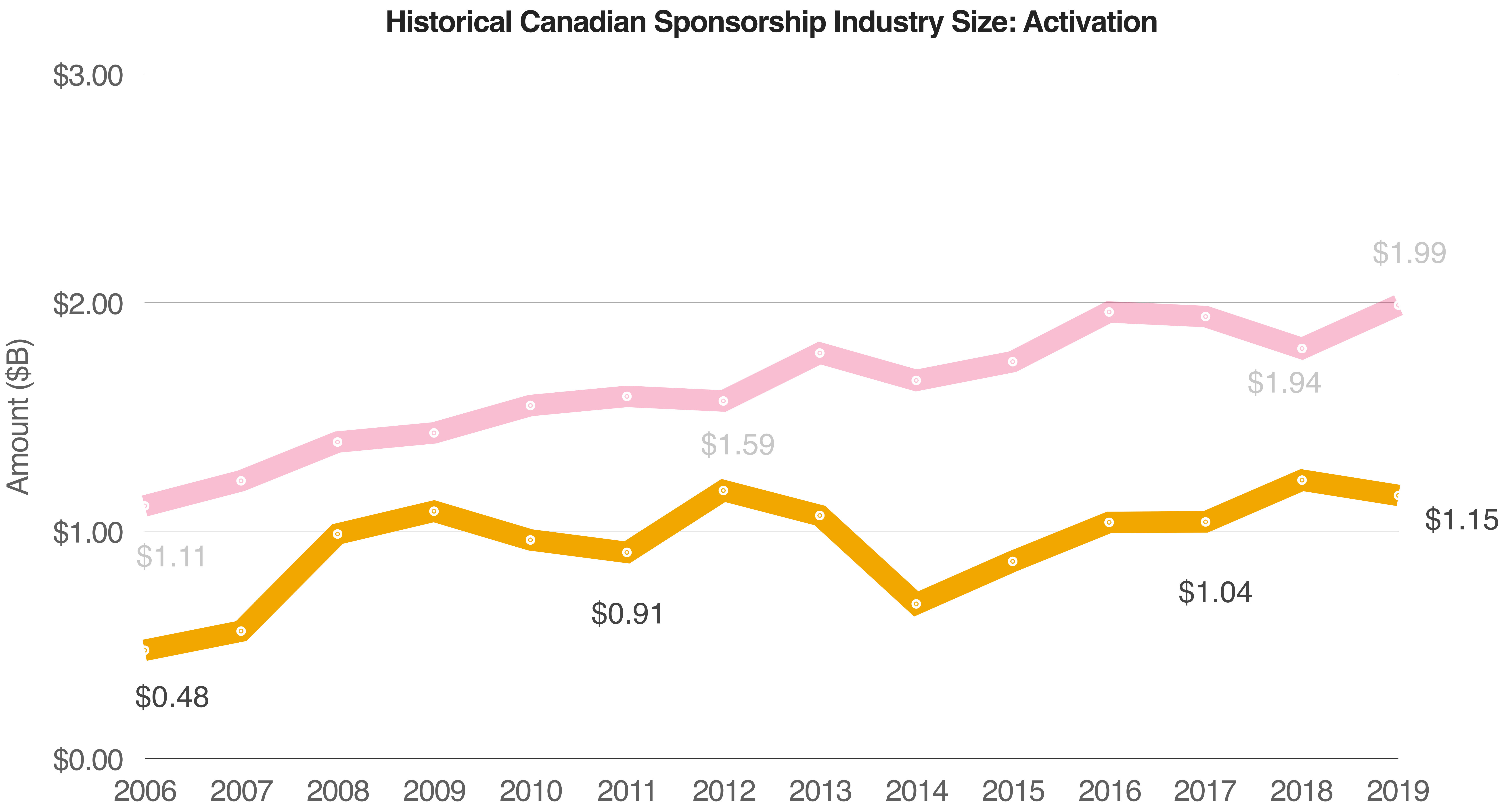
2019 Rights Fee Spend

NOTES

Past 5 years: Consistent

Historical: CAGR of **4.59%**

CANADIAN INDUSTRY SIZE



DATA

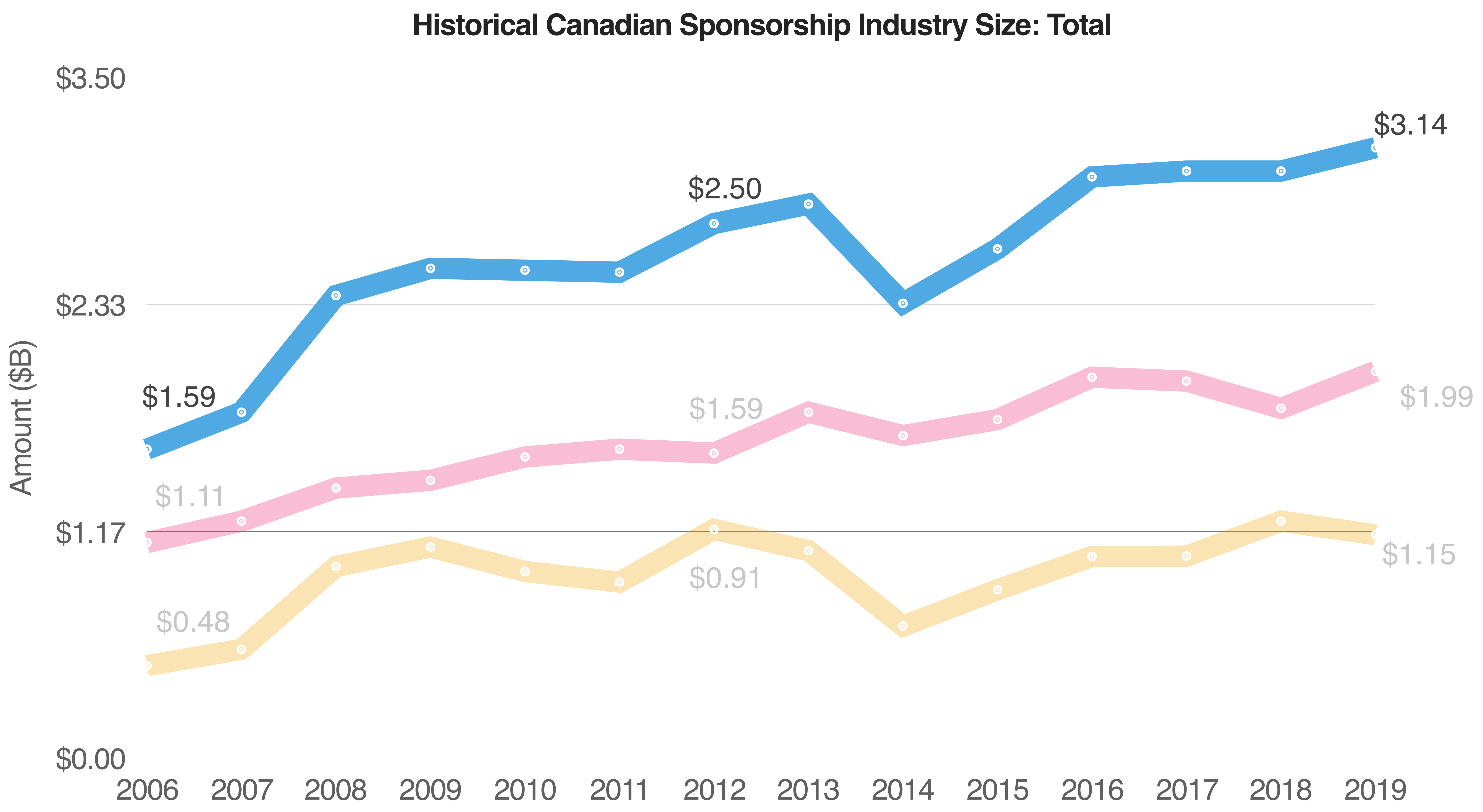
0.58

Activation to Rights Fee in 2018

Key Observation: Total investment in activation has more than doubled in 14 years, up almost 250%

CAGR of total activation spend is **6.95%**.

BIG PICTURE: CANADIAN INDUSTRY SPEND



DATA

$3.14B

in Total 2019 Industry Spend

NOTE

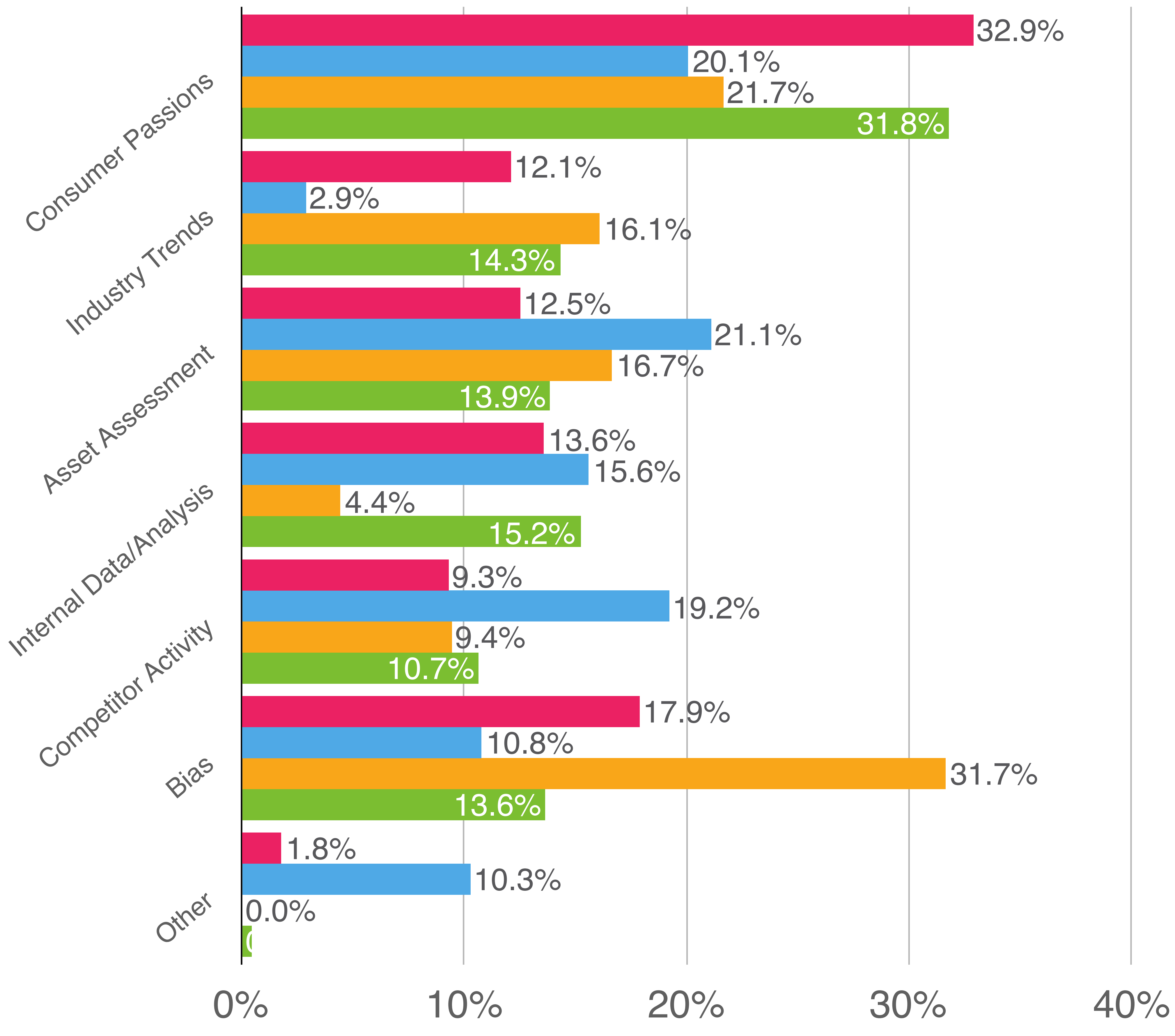
CAGR of rights fees plus activation spend is **5.38%**.

4. Results #1

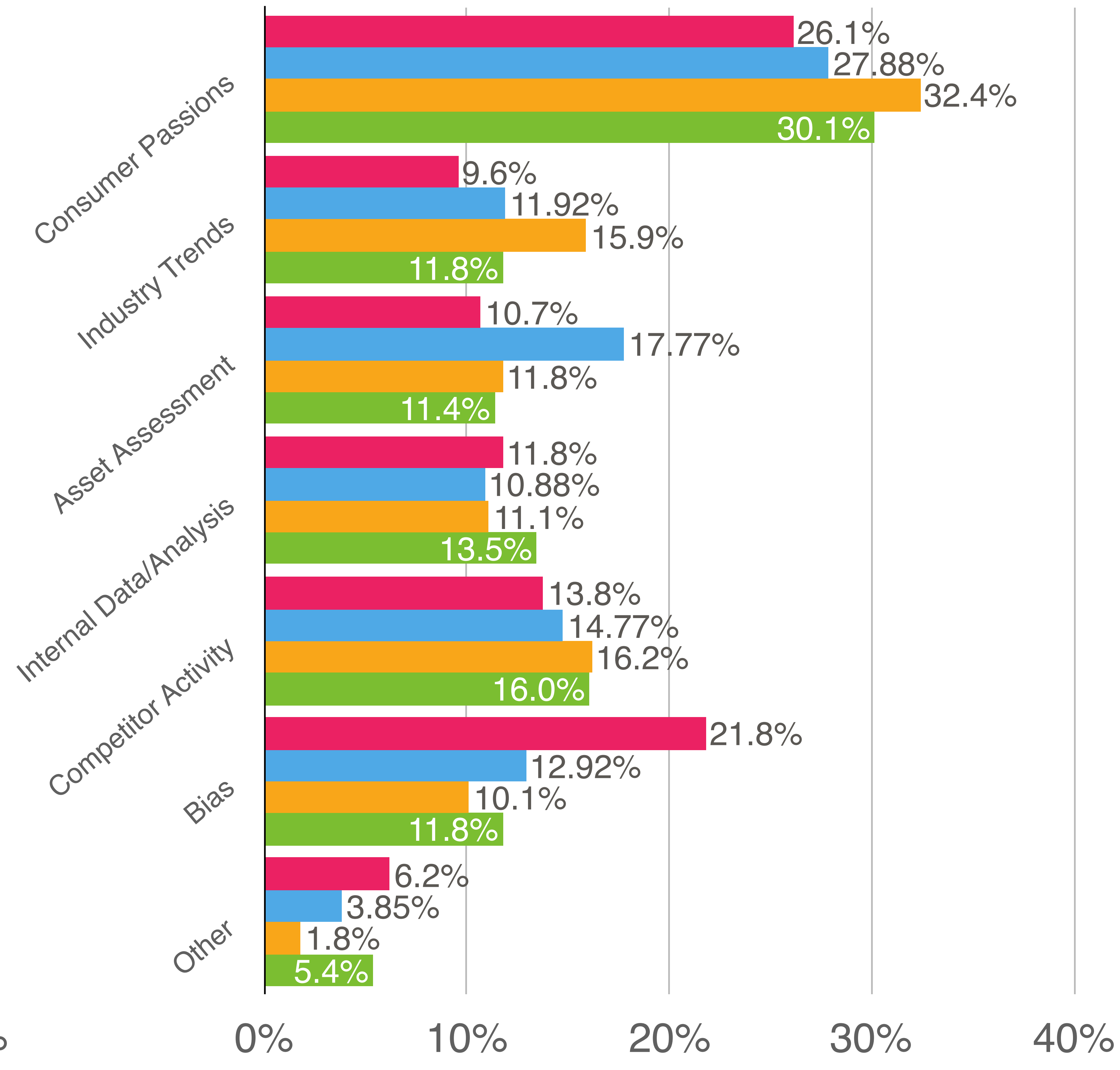
Strategy

DECISION MAKING

Criteria in Decision-Making: Sponsors



Criteria in Decision-Making: Agencies on Sponsors Behalf



DATA

Majority

Of Decisions are About The Right Factors

NOTE ON 2019

Sponsors and agencies report 'bias' again down

Top answer in 2019 for both: "consumer passions"

- 2016
- 2017
- 2018
- 2019

LARGEST SPONSORSHIP CATEGORY

48%
Pro Sport

22%
Amateur Sport

13%
Entertainment, Tours & Attractions

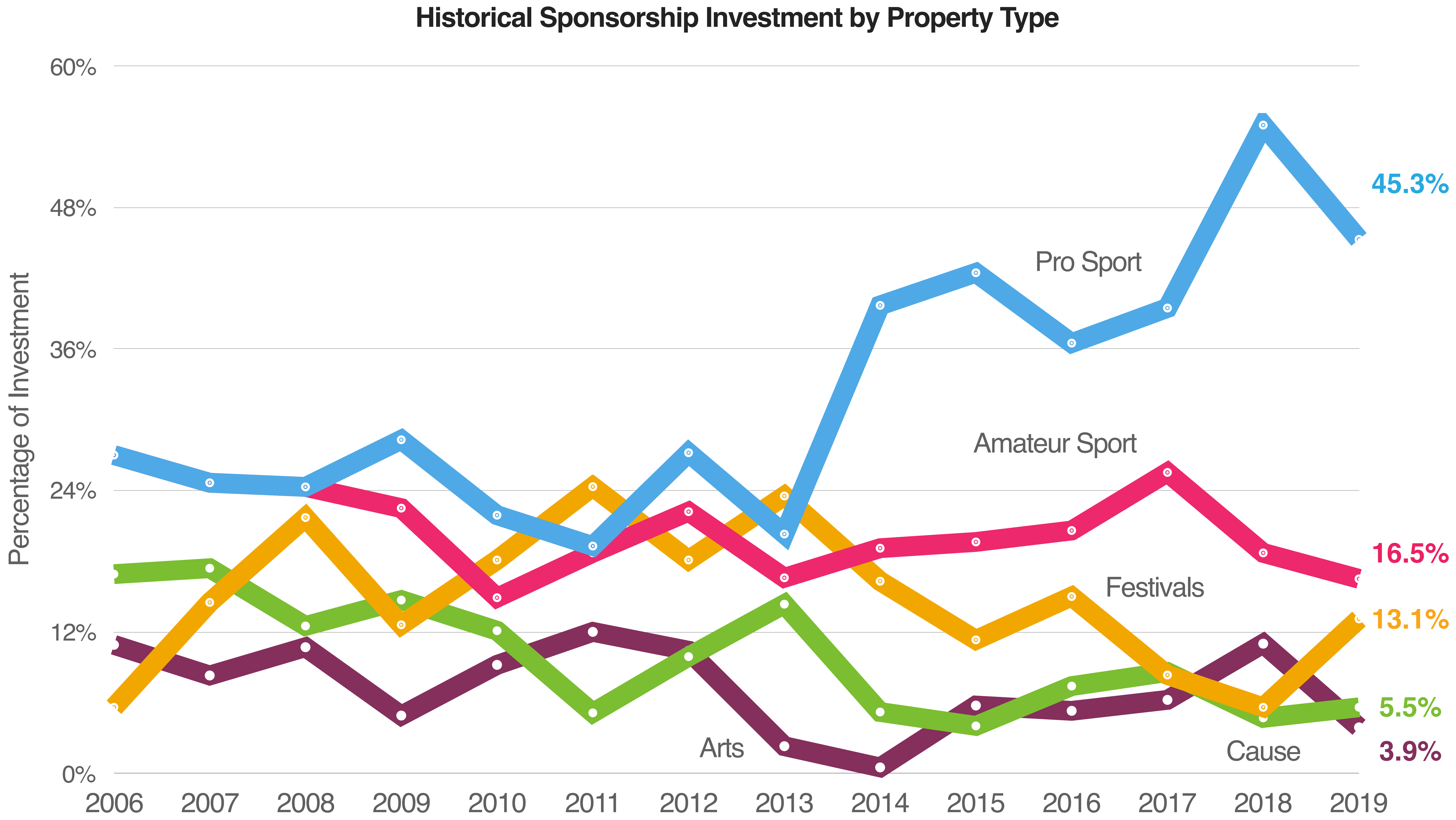
9%
Festivals

DATA

Others
Arts (4%)
Other (4%)

Average Size of Largest Annual Deal: $1.6M
Range: $10,000 to $25M

PROPERTY MIX



DATA

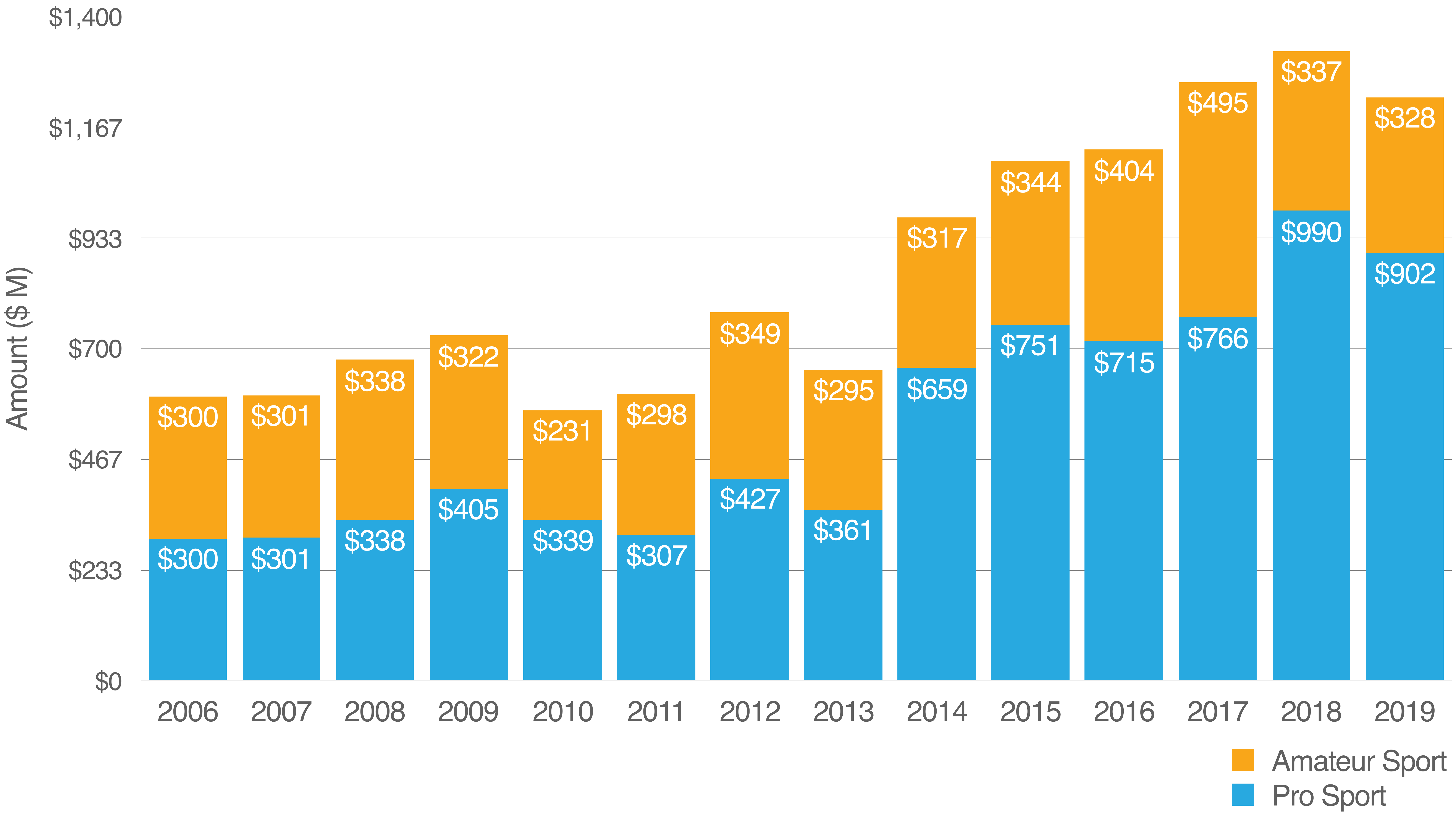
45.3%
of Investment is in Pro Sport

NOTE

Others:
- Other (7.2%)
- Entertainment, Tours & Attractions (7.1%)
- Education (<1%)
- Media (<1%)
- Municipality (<1%)

PROPERTY MIX: SPORT

Historical Sponsorship Investment in Sport



DATA

$1.30B

in Sports

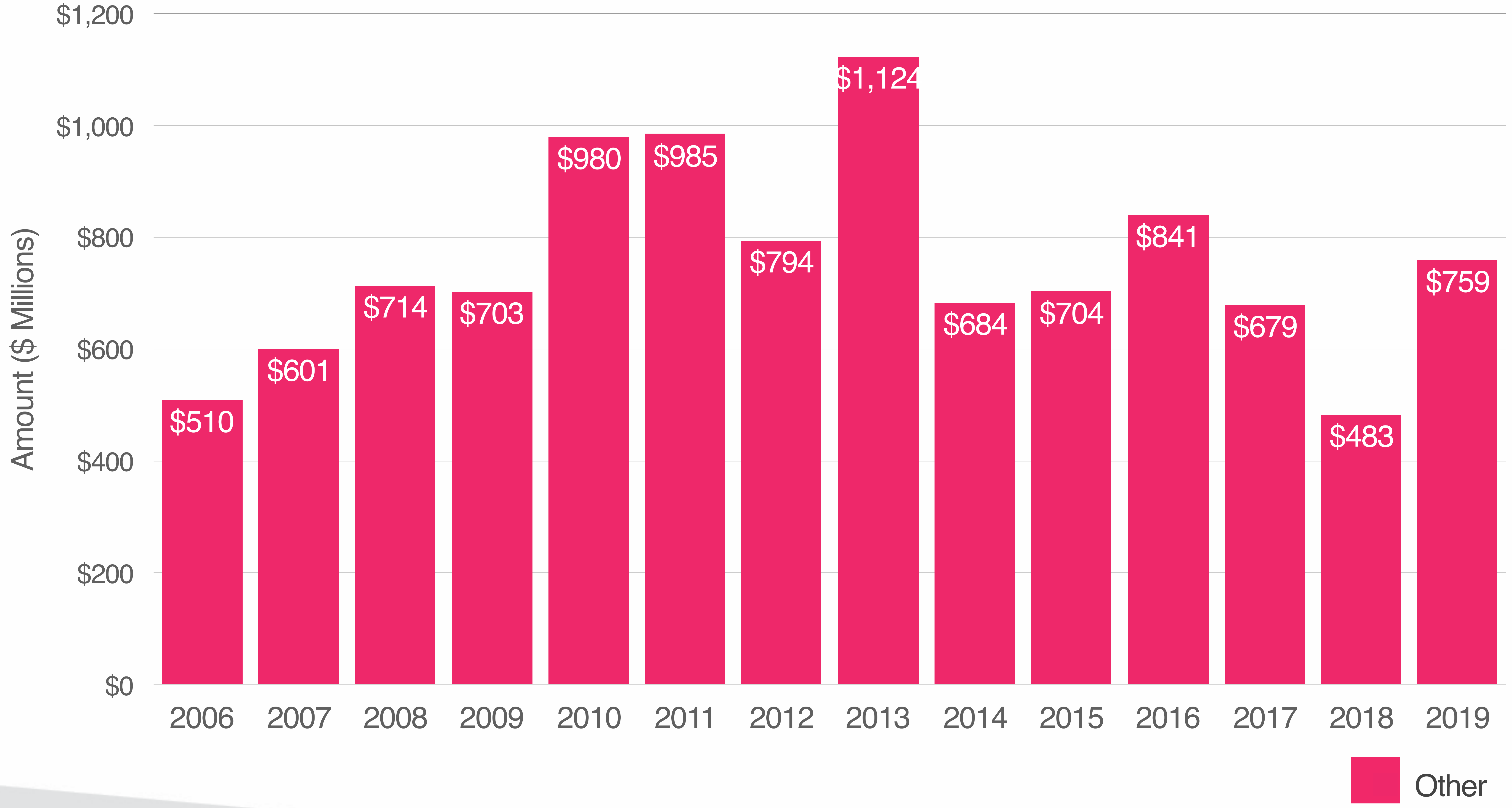
*slight decrease from 2018

NOTE

Pro sport continues to take 'share' from amateur sport (and other speciality areas)

PROPERTY MIX: NON-SPORT

Non-sport sponsorship accounts for **38%** of the industry.



$260 M Festivals

$142 M Entertainment, Tours & Attractions

$13 M Municipalities

$78 M Arts

$111 M Cause

$13 M Education

$143 M Other

SPONSOR INVESTMENT: PROPERTY REACH BY SPEND

2019 DATA I 2018 DATA

“Interesting Shifts but *Go Big or Stay Local* still holds”

15.3% I 11.8%
International

41.0% I 36.2%
National

3.6% I 20.4%
Multi-Provincial

15.1% I 7.5%
Provincial

14.0% I 10.4%
Regional

11.1% I 13.7%
Local

MISALIGNED VIEWS ON THE FUTURE

DECREASE	STAY THE SAME	INCREASE
32.1% Sponsor	57.1% Sponsor	10.7% Sponsor
39.6% Property	39.6% Property	20.7% Property
46.5% Agency	44.2% Agency	9.3% Agency

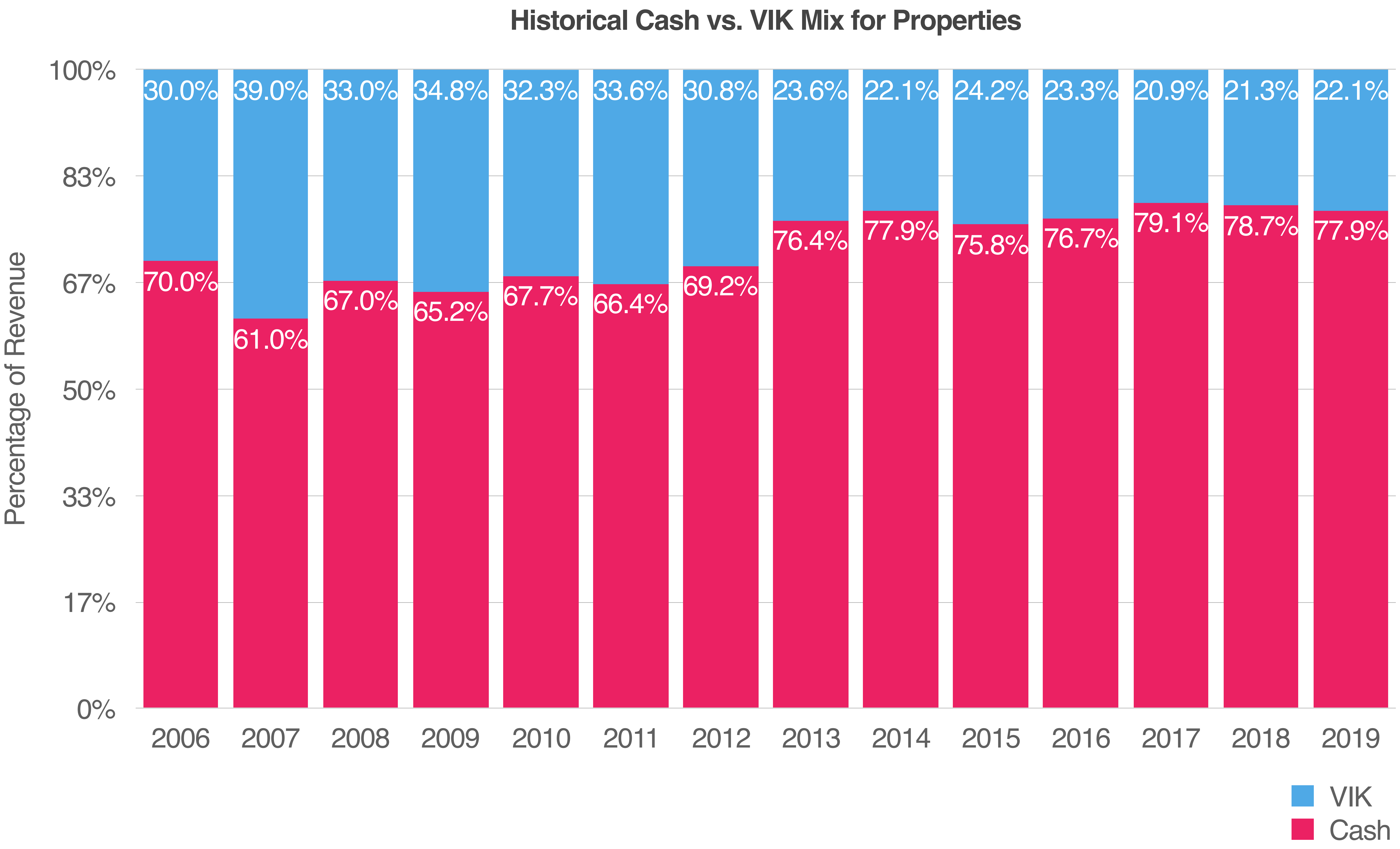
REALITY

COVID impact

5. Results #2

The Deal

DEALS: CASH OR VIK



DATA

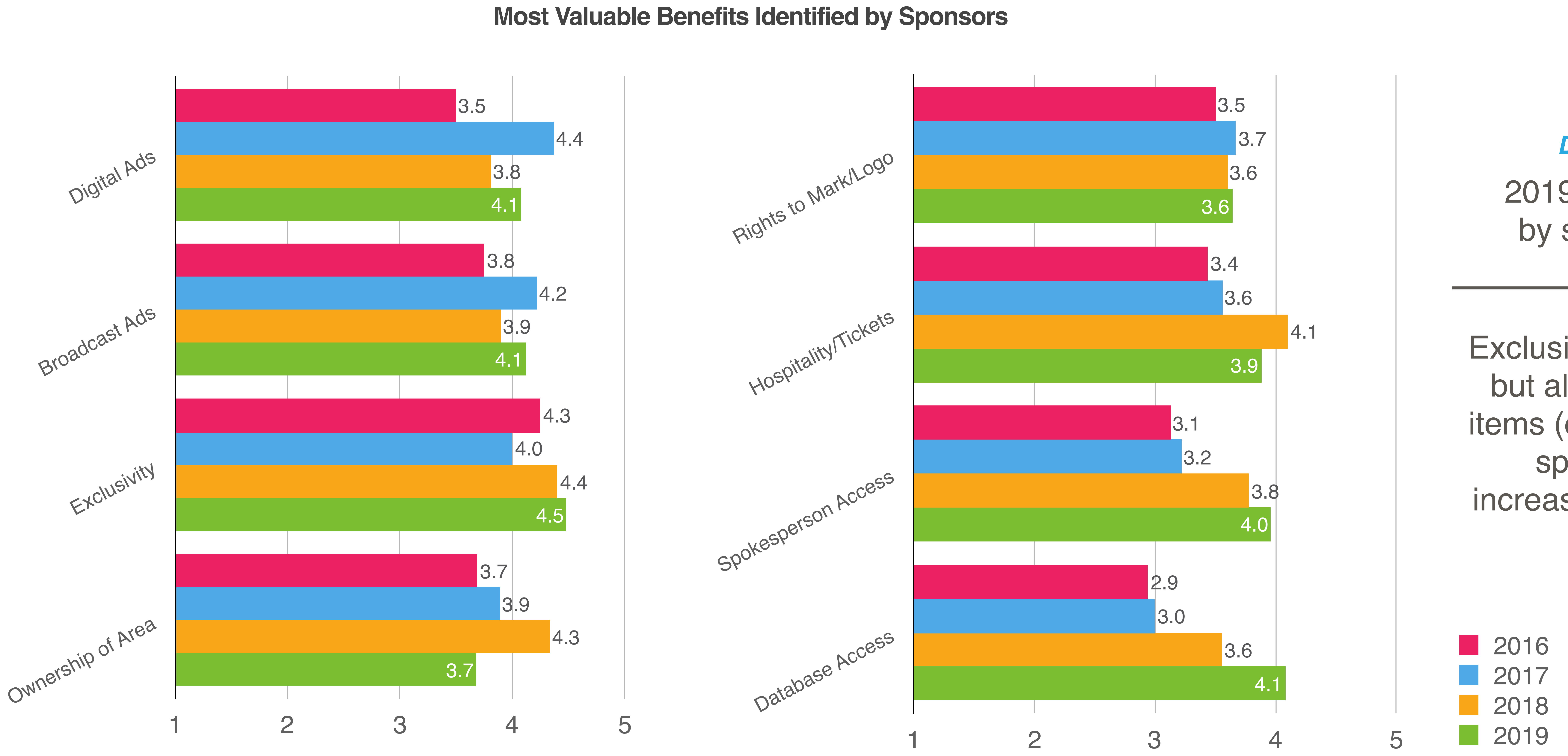
77.9%

Ratio for cash over VIK

NOTE

Over the past 7 years, there has been consistent results of investment of **Cash to VIK** at just under **5:1**.

DEALS: *VALUABLE BENEFITS*



DATA & NOTE

2019 characterized by some change.

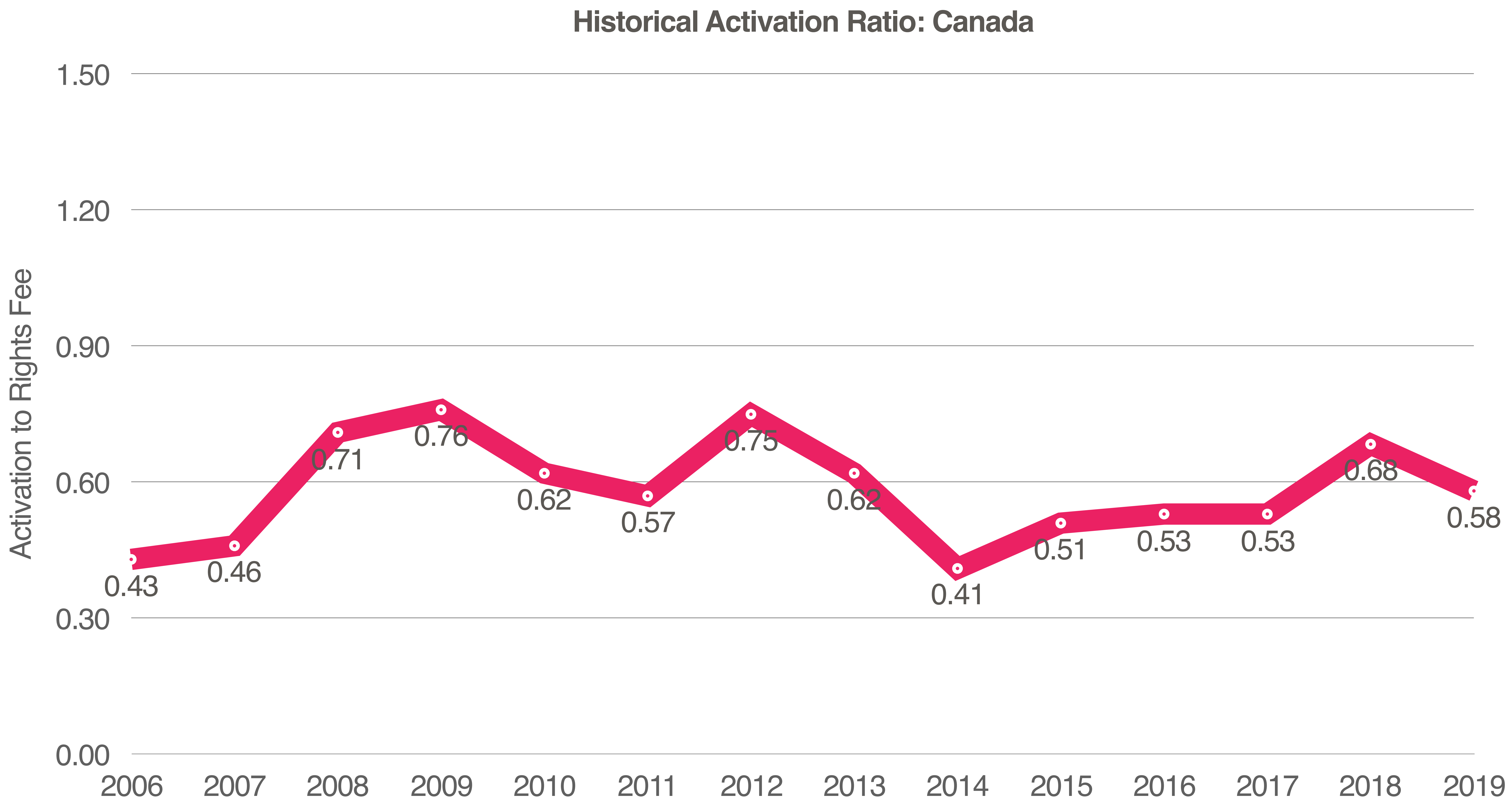
Exclusivity remained #1, but all access related items (database, tickets, spokesperson) increased over the prior years.

NOTE "Co-sponsorship" suggested by 7 sponsors under other (with average score of 3.8)

6. Results #3

Activation

ACTIVATION: RATIO



DATA

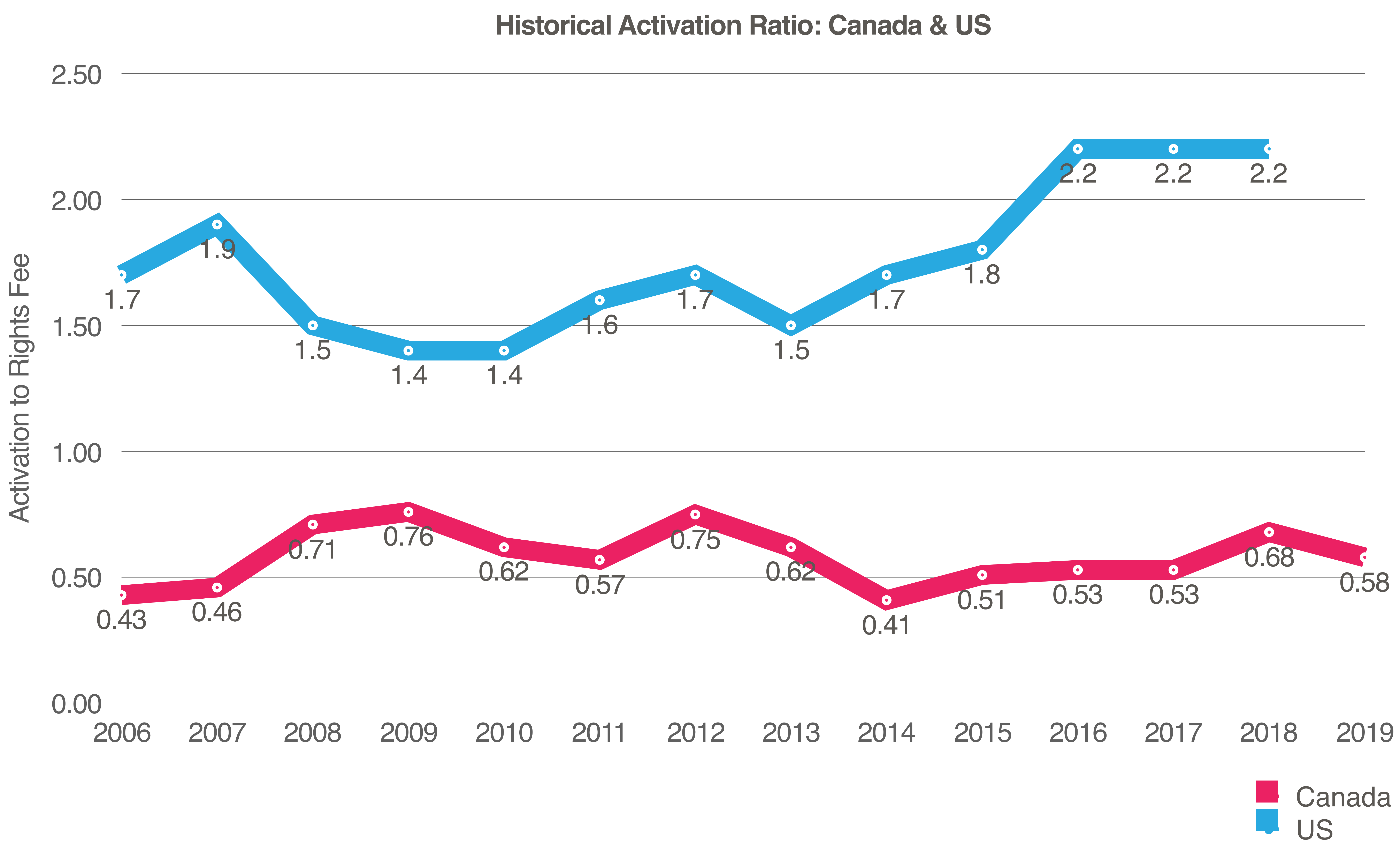
0.58

Activation to Rights Fee in Canada.

After the highest recorded number since 2012 in 2018, a small drop.

NOTE Agencies report an activation ratio of 0.86 for their sponsor clients on their sponsorships.

ACTIVATION: *RATIO*



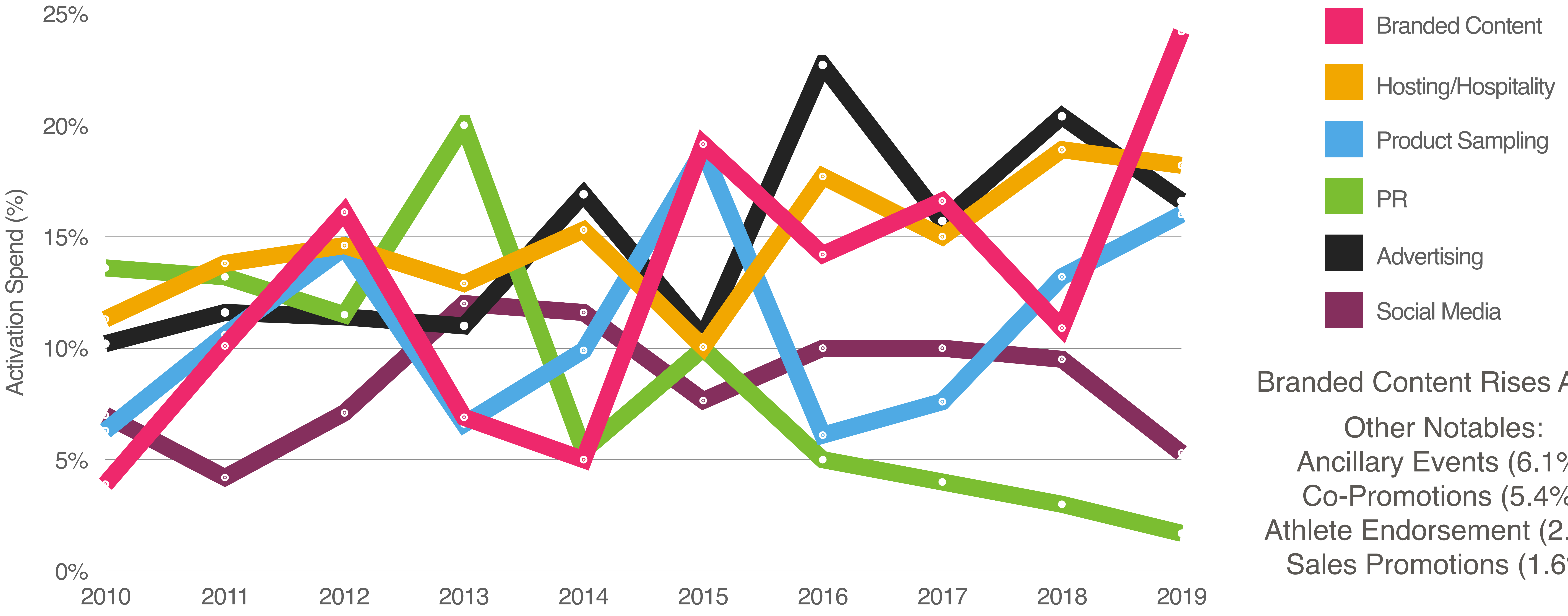
DATA

2.2

Most Recent Activation Ratio in US (from IEG)

The activation ratio in the US is close to being more than **4X higher** than in Canada.

ACTIVATION: *MIX OF INVESTMENT*



Branded Content Rises Again

Other Notables:
Ancillary Events (6.1%)
Co-Promotions (5.4%)
Athlete Endorsement (2.8%)
Sales Promotions (1.6%)

ACTIVATION: MIX OF INVESTMENT

Agency List of Sponsor Client Activation Spend

16.3% Branded Content

13.0% Product Sampling

12.0% Advertising

11.0% Hosting & Hospitality

10.9% Social Media

8.0% Other

5.5% Internal Marketing

5.3% Co-Promotions

4.8% PR

4.1% Athletes

3.9% Sales & Consumer Promotions

2.8% Packaging

2.4% Ancillary Events

0.3% Trade Allowances

ACTIVATION: *DRIVERS OF ROI - SPONSOR VIEW*

#1
Branded Content
(17.5%)

#2
Hosting/Hospitality
(12.7%)

#3
Athletes
(11.1%)

#4
PR
(9.5%)

#4
Social Media
(9.5%)

#5
Co-Promotions
(7.9%)

#5
Advertising
(7.9%)

ROI RANKING

Shifts

Branded Content Return to #1
(5 of past 6 years)

First time athletes in Top 3

ACTIVATION: *DRIVERS OF ROI - PROPERTY VIEW*

#1
Branded Content
(dominent #1 - 30.3%)

#2
Social Media
(14.1%)

#3
Sales/Consumer Promotions
(10.1%)

#4
Product Sampling
(9.1%)

#5
Co-Promotions
(7.1%)

#6
Hosting/Hospitality
(6.1%)

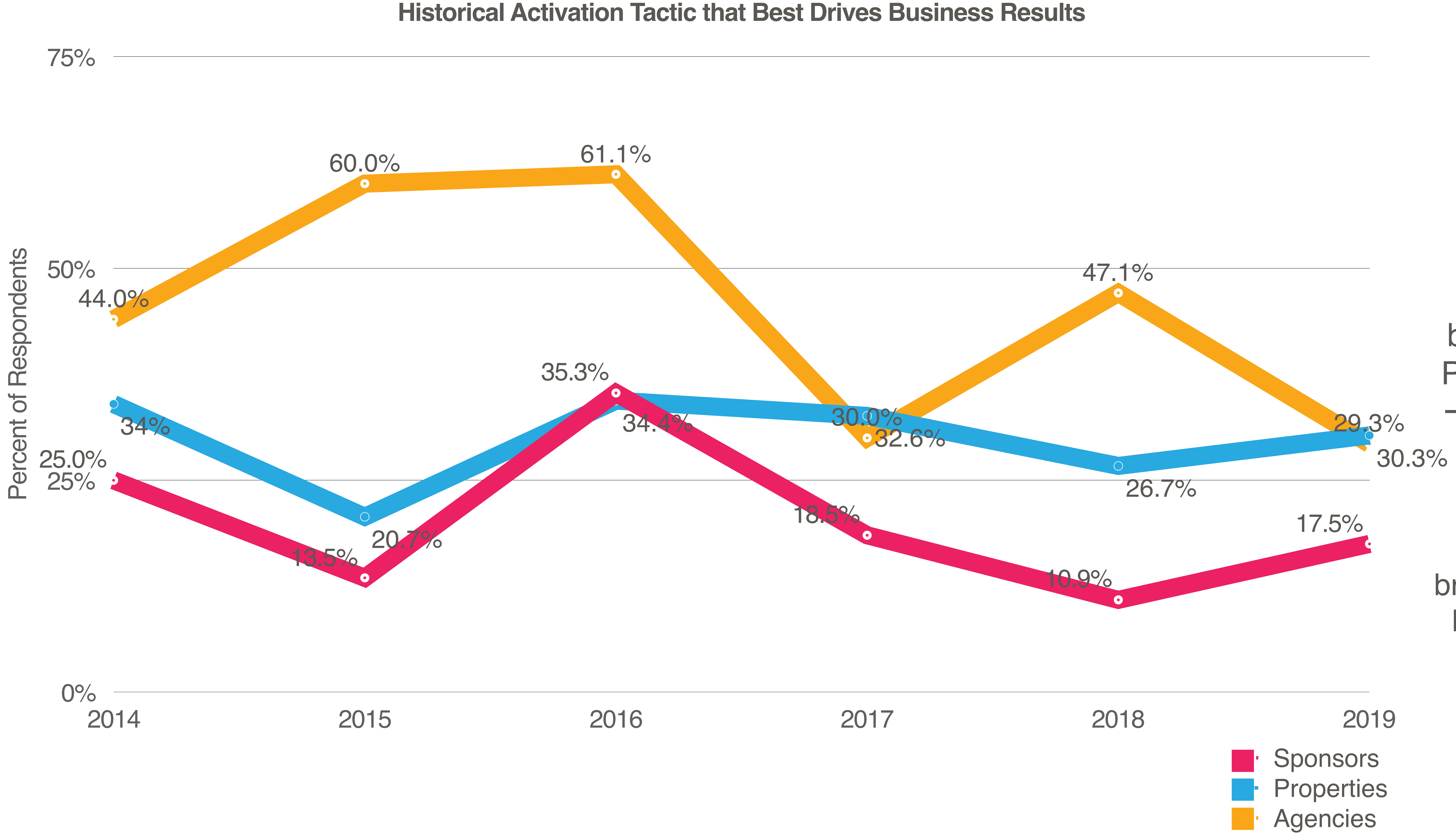
DATA

No Shift

Views in 2019 same as 2016 to 2018 period

Time to focus on this topic? COVID has accelerated this learning.

ACTIVATION: *BRANDED CONTENT*



DATA

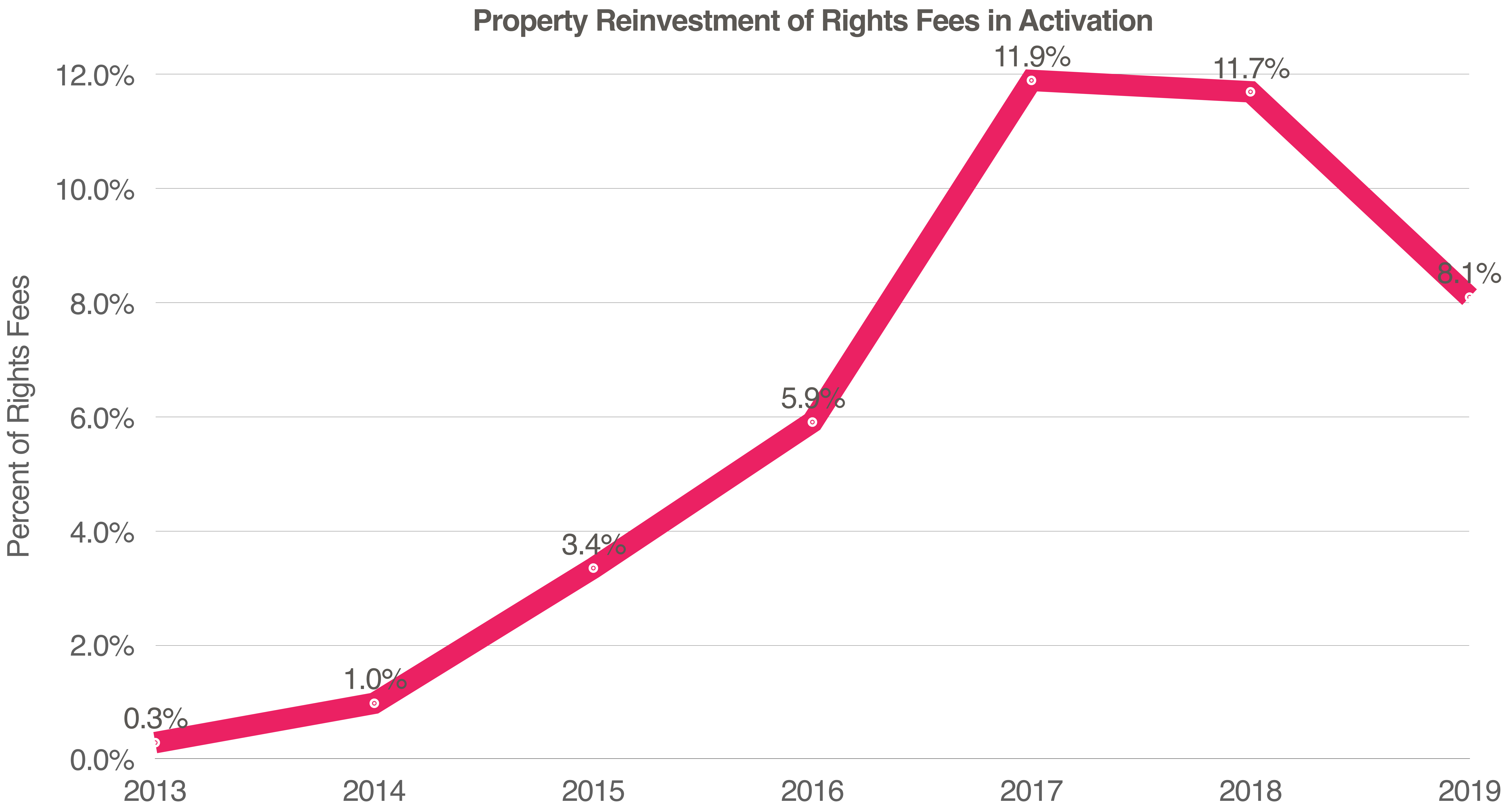
1 ST

Branded Content is the best tactic for Sponsors, Properties, and Agencies

NOTE

All three stakeholder groups reported that branded content best drives business results, from an activation perspective.

ACTIVATION: *PROPERTY REINVESTMENT*



DATA

8.1%

Reinvested by Properties in Activation

NOTES

20.8% of respondents reported no re-investment in activation

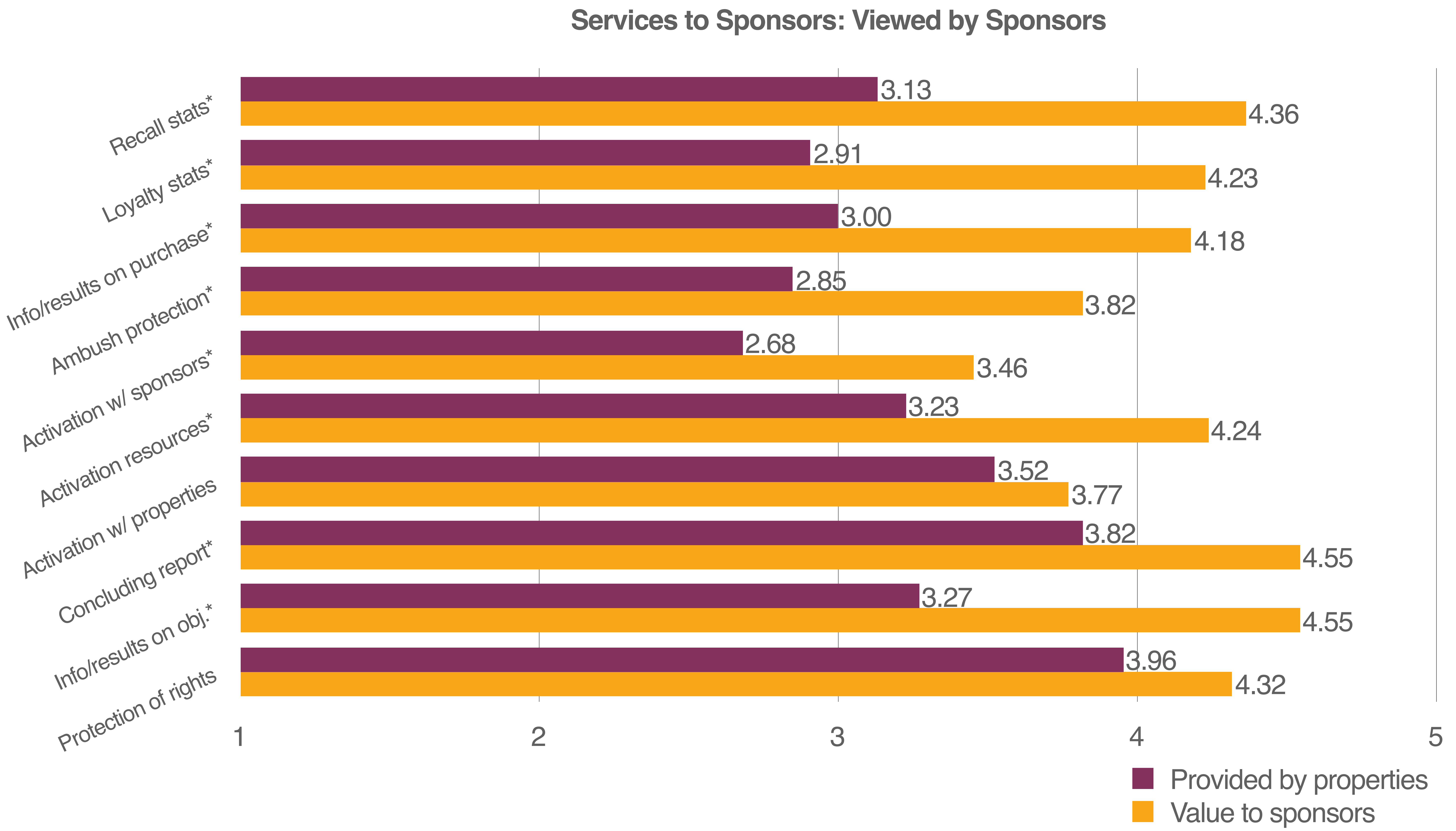
Most Common Tactics

#1 - Social Media (16.7%)
#2 - Hosting/Hospitality (15.5%)
#3 - Advertising (14.3%)
#4 - Branded Content (13.6%)
#5 - Product Sampling (7.3%)

7. Results #4

Servicing

SERVICING: SPONSOR PERSPECTIVE



DATA

8 of 10

are Statistically Significant Differences (*)

NOTE

The servicing issue remains in Canadian sponsorship.

This has been consistent for 14 years, with a few exceptions.

PROPERTIES INVESTMENT IN SERVICING STABILIZES

Servicing - 2019

14.5%

of sponsorship revenue is allocated to servicing

Servicing - Past

2018: 16.6%
2017: 10.4%

of sponsorship revenue is allocated to servicing

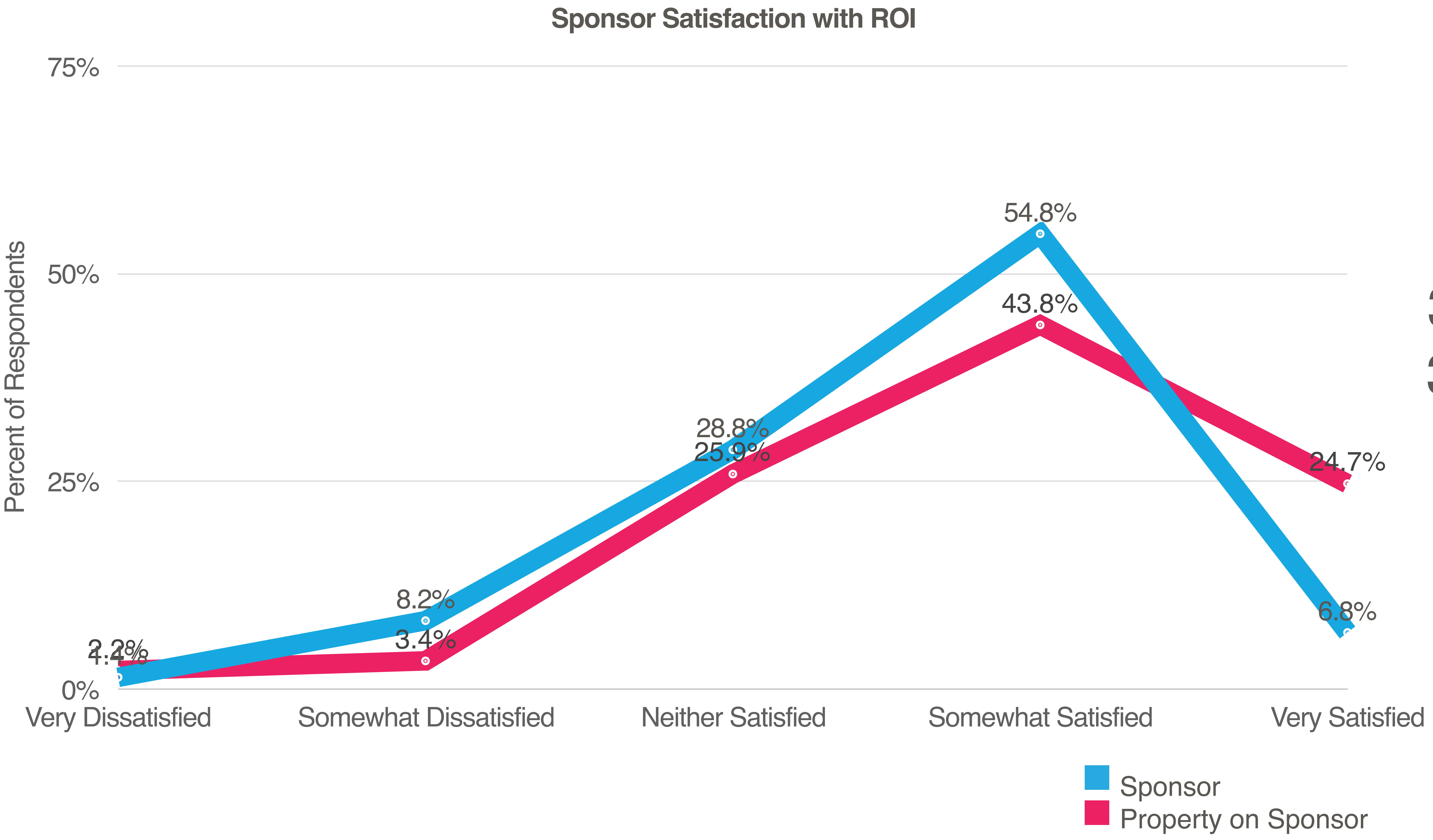
DATA

10.1% of property respondents reported no investment in servicing. Very positive finding.

8. Results #5

Evaluation

SPONSOR AND PROPERTY VIEWS OF SPONSORSHIP ROI



DATA

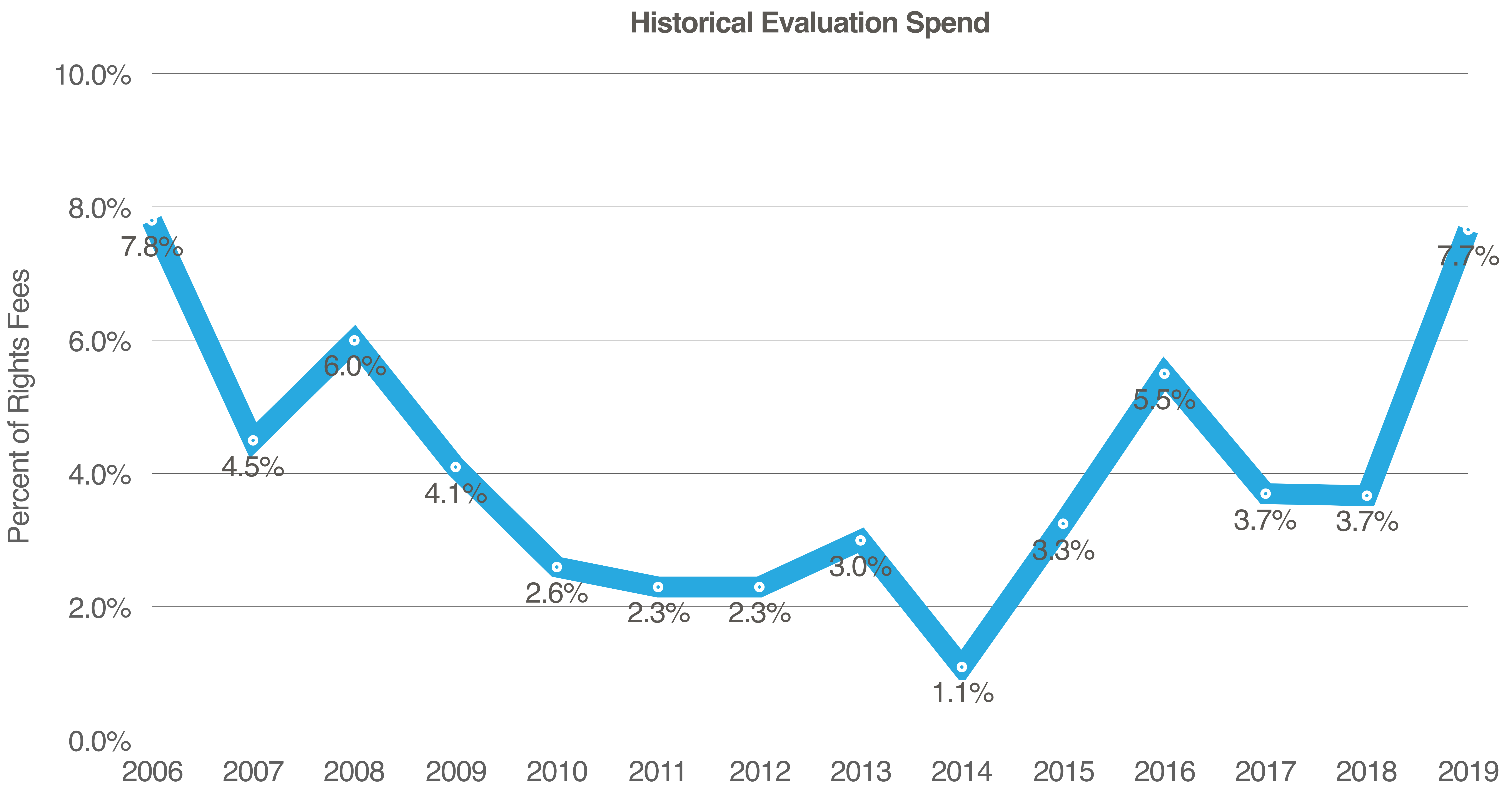
3.38 (out of 5) Sponsor Mean

3.85 (out of 5) Property Mean

NOTE

The fact that 9 out of 10 sponsors are not 'very satisfied' is a major concern for the industry.

EVALUATION INVESTMENT



Pre-evaluation: *10.6%* *3.6%* *12.6%* *8.5%* *9.7%*

DATA

7.7%

of Rights Fee Spent on evaluation (note this is average by sponsor, not weighted for sponsor size)

NOTE

Best result in 14 years! But, still not good.

16% reported spending nothing on evaluation.

Pre-Sponsorship evaluation spend was **9.7%**.

PROPERTY EVALUATION

GOOD NEWS

7.2%
Proportion (on average) of sponsorship revenues invested in sponsorship evaluation
*2018 result: 5.4%

10.7%
Proportion (on average) of those dollars allocated to pre-sponsorship evaluation
*2018 result: 10.1%

LESS GOOD NEWS

31.2%
spent zero on sponsorship evaluation
*2018 result: 30.4%

56.6%
Spent nothing on pre-sponsorship evaluation
*2018 result: 48.2%

DATA

+++

The results noted on this page suggest that there is a small proportion of properties, who are investing heavily in evaluation.

MEASUREMENT IS COSTING US SLEEP

Top Concerns	Meeting Targets*	Demonstrating ROI	Demonstrating ROI	Other*	Demonstrating ROI	Demonstrating ROI	Meeting Targets** Evaluation/Measure	Fear about delivering value as ROI
Year	2012	2013	2014	2015	2016	2017	2018	2019

Sponsors

- 61% mentioned ROI/Value
- "Are we nimble and adaptable to changing local and global pressures, or have we locked ourselves into contracts that no longer deliver value?"

Agencies

- **57%** mentioned ROI/Value
- "Effective measurement of ROI that captures the "value tail" of sponsorships versus immediate returns only"

Properties

- **48%** mentioned ROI/Value
- "Lack of quality data in order to make informed decisions and run a sophisticated sponsorship program"

*Demonstrating ROI #2
**Demonstrating ROI #3

9. Discussion

So What?

SO WHAT?

$3.14B
Highest Spend to Date

0.58
Activation Ratio

#1
Rank of Branded Content as driver for ROI for all three stakeholders

48%
Of brands have largest sponsorship in professional sport

15.3%
Of sponsorship spend on properties with international reach

Cosmic Shifts

- $3.14 billion total spend
- Expressed fear over COVID
- Consumer passions returns as #1 criteria in sponsorship decision-making
- Spike in proportion of rights fee spend on properties with international reach to 15.3%
- ROI gap (2 years in a row) aligned between sponsors and properties

Important Signals

- Sponsorship as percentage of MarCom budgets sliding gradually year over year (to 20.2%)
- Activation growth (6.95%) outpacing rights fee growth (4.59%) over 14 years of CSLS
  - Total investment in activation up 250% in 14 years
- Very negative view on 2021 for sponsorship
- 90% of sponsors are NOT ‘very satisfied’ with ROI

Same Ole

- Servicing deficiency
- Outclassed on activation ratio
- The Pro Sport Renaissance of 2014 and 2018 continues
- Exclusivity is the most valuable benefit for sponsors
- Total spend on rights fees flat since 2016

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CANADIAN SPONSORSHIP LANDSCAPE STUDY

Qualitative Q's

Deep Dives into Relevant Topics

How important is an attachment to the Olympic Games when you decide to sponsor a particular property? What about the fact that they are far from Canada?

Sponsors

- Not or Marginally Important (60% of sample).
  - “Well, it is important one month every 2 years. For us, not consistent enough.”
  - The fact that the Games are far away is a negative major factor for most.
  - A small proportion of sponsor respondents (13%) see the Games as an opportunity via partnerships with individual athletes to drive awareness.

Properties

- Much more positive about Games.
- Extremely Important (39% or respondents).
  - "Exceedingly important to attract sponsors.”

Agencies

- Distance an issue: 42% note no linkage.
- Idea that the Games open up opportunities for sponsorship:
  - “Those competing with the Games will be able to attract non-Olympic sponsors who need a platform - so it is good for everyone."

DEEP DIVE: *Sponsor Objectives*

“What is the main pain point and/or business objective that sponsorship helps your brand, partners or sponsor clients meet?”

Reach an Audience

“Sponsorship help us demonstrate our B2B solutions to a broader audience in a relatable manner.” **Sponsor**

Create a Meaningful Connection with Consumers

“Beyond a media property, it provides passion and engagement opportunities to commercialize the sponsorship investment.” **Agency**

Build Brand Awareness

“Creating meaningful grassroots engagement with consumers at the community level that appreciate a brand's investment and are willing to give their preference to that brand.” **Property**

Agency Input (new questions)

Top 3 Objectives
Sponsor Clients

- 67% direct consumer engagement (as one of the 3 objectives)
- 59% brand awareness (as one of the 3 objectives)
- 41% driving sales (as one of the 3 objectives)

ROI Measurement
Techniques Used

Many approaches suggested, with two themes emerging:

- 43% take a customized and proprietary approach to measure ROI
- 19% adopt traditional data collection on-site and digitally

Advice to Canadian Industry
To Attract Global Sponsorship $'s

- Based on responses, a challenging undertaking.
- Increased business intelligence identified by 15% as a key driver

"Show value to those global companies from an audience perspective - do we have the audience they are seeking?"

"Properties need to take risk and look beyond the traditional appeal to banks and telecoms and look globally and do the research and put in the time and effort to bring that global company the info they need to see how that Canadian property and help them."

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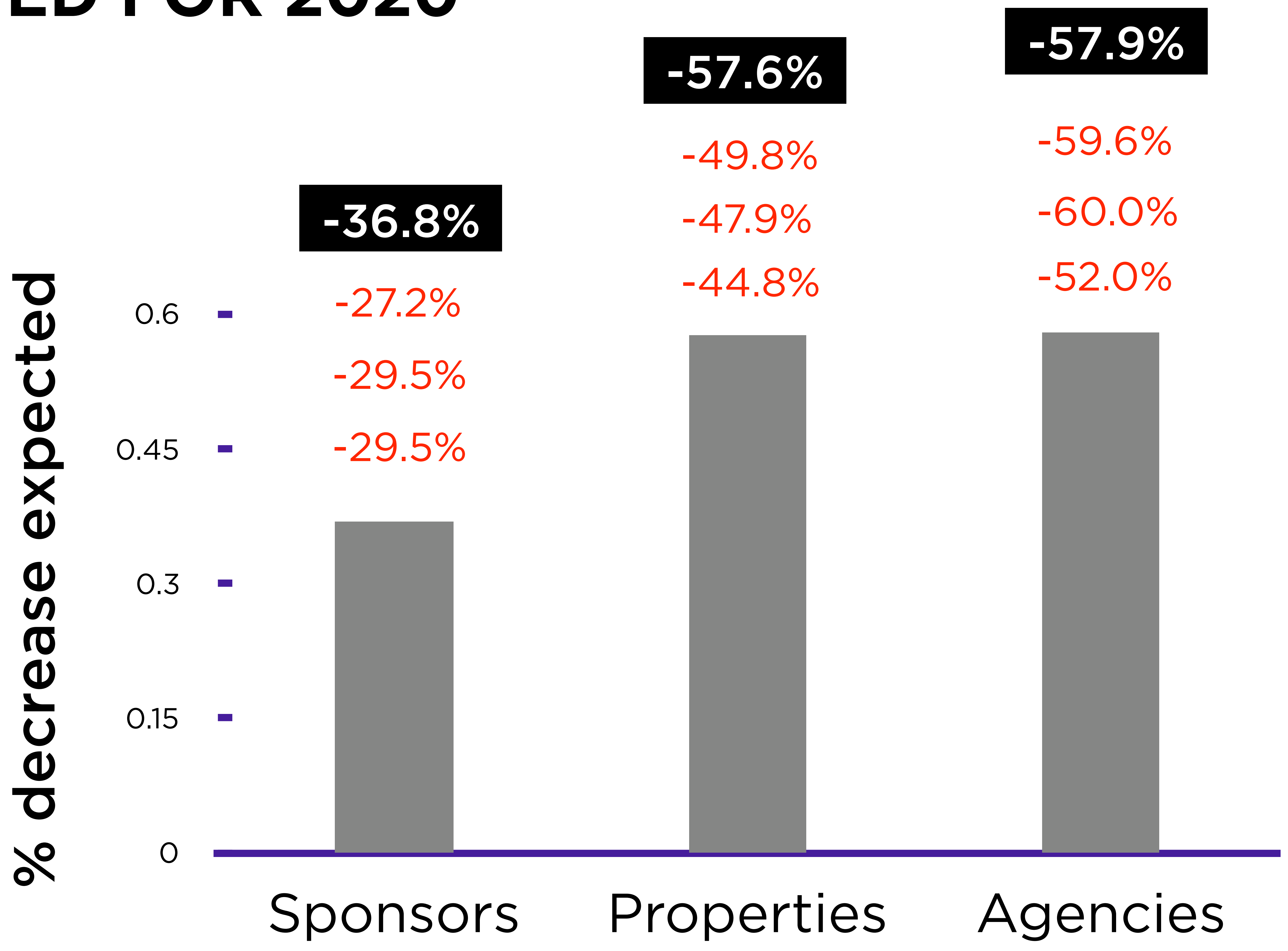
CANADIAN SPONSORSHIP LANDSCAPE STUDY

Reality Check

SponsorshipX COVID Impact Studies I to IV

SPX

FORECASTS FOR REDUCTION IN RIGHTS FEES INVESTMENT, REVENUES OR BILLINGS EXPECTED FOR 2020



Shifts Since June

Sponsors - **Significant drop**
Properties - **Significant drop**
Agencies - **Modest improvement**

Note: Red data labels from top-down show survey results from Round #1 (April), #2 (May), and #3 June, respectively.

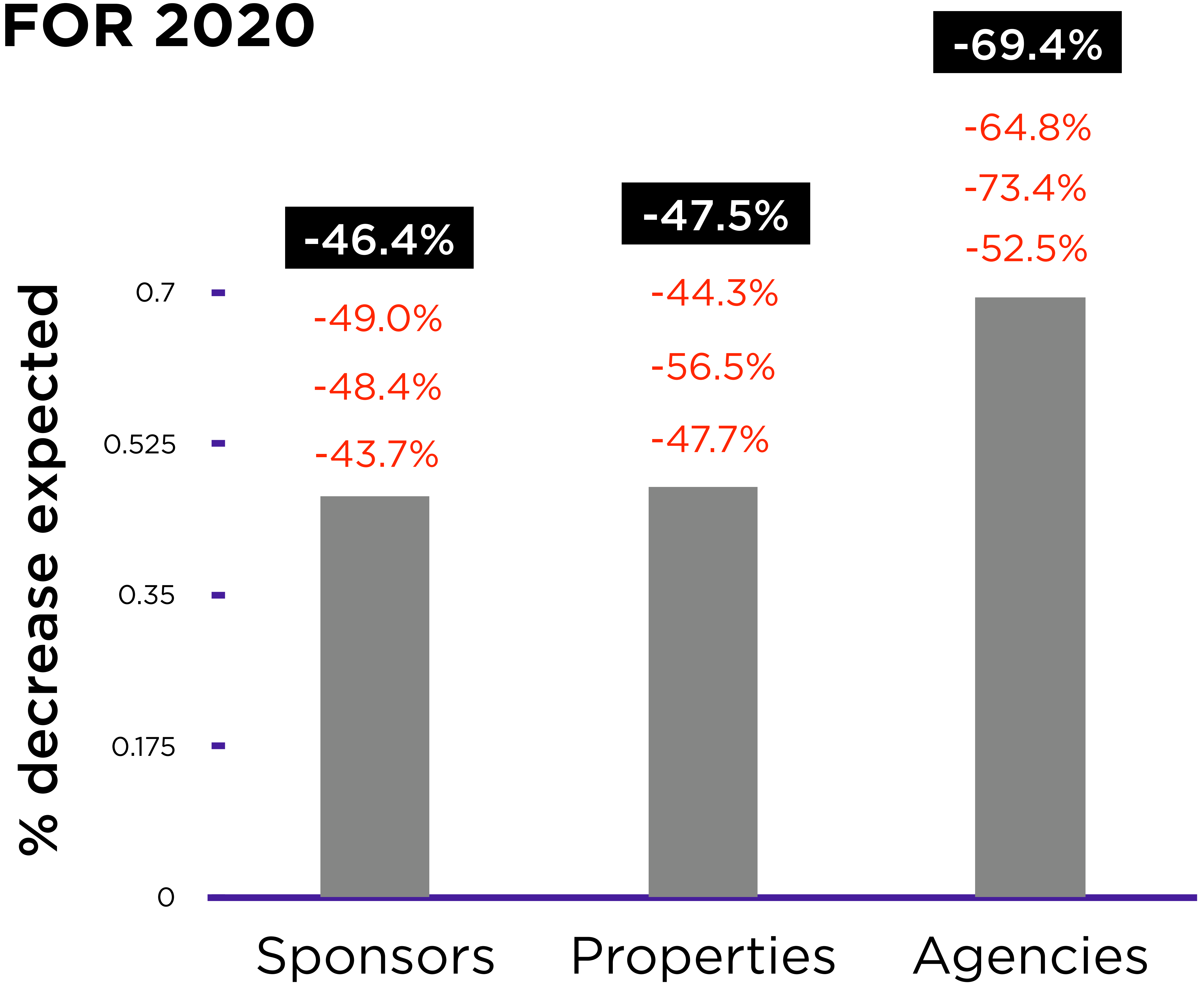
SP^{x}

FORECASTS FOR REDUCTION IN PLANNED ACTIVATION SPEND BY SPONSOR EXPECTED FOR 2020

Shifts Since June

Sponsors - **Modest improvement**
Properties - **Modest drop**
Agencies - **Significant drop**

Note: Red data labels from top-down show survey results from Round #1 (April), #2 (May), and #3 June, respectively.



SO WHAT?

$3.14B
Highest Spend to Date

0.58
Activation Ratio

#1
Rank of Branded Content as driver for ROI for all three stakeholders

48%
Of brands have largest sponsorship in professional sport

15.3%
Of sponsorship spend on properties with international reach

Cosmic Shifts

- $3.14 billion total spend
- Expressed fear over COVID
- Consumer passions returns as #1 criteria in sponsorship decision-making
- Spike in proportion of rights fee spend on properties with international reach to 15.3%
- ROI gap (2 years in a row) aligned between sponsors and properties

Important Signals

- Sponsorship as percentage of MarCom budgets sliding gradually year over year (to 20.2%)
- Activation growth (6.95%) outpacing rights fee growth (4.59%) over 14 years of CSLS
  - Total investment in activation up 250% in 14 years
- Very negative view on 2021 for sponsorship
- 90% of sponsors are NOT 'very satisfied' with ROI

Same Ole

- Servicing deficiency
- Outclassed on activation ratio
- The Pro Sport Renaissance of 2014 and 2018 continues
- Exclusivity is the most valuable benefit for sponsors
- Total spend on rights fees flat since 2016

CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

Visit www.sponsorshiplandscape.com for more info!

Questions or Comments?
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