18th ANNUAL

CSLS

Canadian sponsorship landscape study

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Special Thanks: SMCC Education Committee

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.

ACKNOWLEDGEMENTS
RESPONDENTS & "SHARERS"

ÉICC
L'étude sur l'industrie de la commandite au Canada

A big thank you to all who completed and/or shared the study.

CSTA ACTS

SPORT LEADERSHIP SPORTIF

We count on many organizations and individuals to help us to collect the data to help make our results stronger.

CSLS
Canadian sponsorship landscape study

SPONSORSHIP MARKETING COUNCIL CANADA

CONTENTS

18TH ANNUAL CSLS

- RESULTS (2023 Calendar Year)
- ANALYSIS (2006-2023)
- INDUSTRY (TRENDS, SIZE & FUTURE)

SPECIAL TOPICS (17TH & 18TH COMBINED)

QUALITATIVE DEEP DIVE

- The Future of Sponsorship
- Talent & Sponsorship
- New Graduates & Sponsorship
- The Pain Points of Sponsorship

CSLS HISTORY

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 & SMCC

2021

SponsorshipX Clubhouse & SMCC

2022

SPX Montreal & SMCC

2023

SPX Grey Cup & SMCC

2024

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.

2021
Not Pandemic Proof

Although sponsorship may have been resilient during the economic recession, it was impacted heavily (50% reduction) during the pandemic.

2023
Activation Growth

Activation reaches an all-time high, matching rights fees investment.

RESULTS

18TH ANNUAL

THE STORY OF 2023

Sponsorship is back but better and smarter. Of course, brands are changing how they spend.

SUMMARY

1. Activation spend and ratio best ever.
2. We are back post-Pandemic.
3. Brands are changing how they spend on sponsorship.
4. Properties are pitching in.
5. Agencies are active and under competitive pressure.
6. ROI, Satisfaction & Evaluation still remain problematic.

Canadian sponsorship landscape study

SPONSORSHIP MARKETING COUNCIL CANADA

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. Results #6
Property Reinvestment

10. Summary
Deep Dives &
Conclusion

RESULTS

THE STUDY

Background

01

RESULTS

THE SAMPLE

Respondents

02

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

RESULTS

THE STUDY

01

Background

THE SAMPLE

02

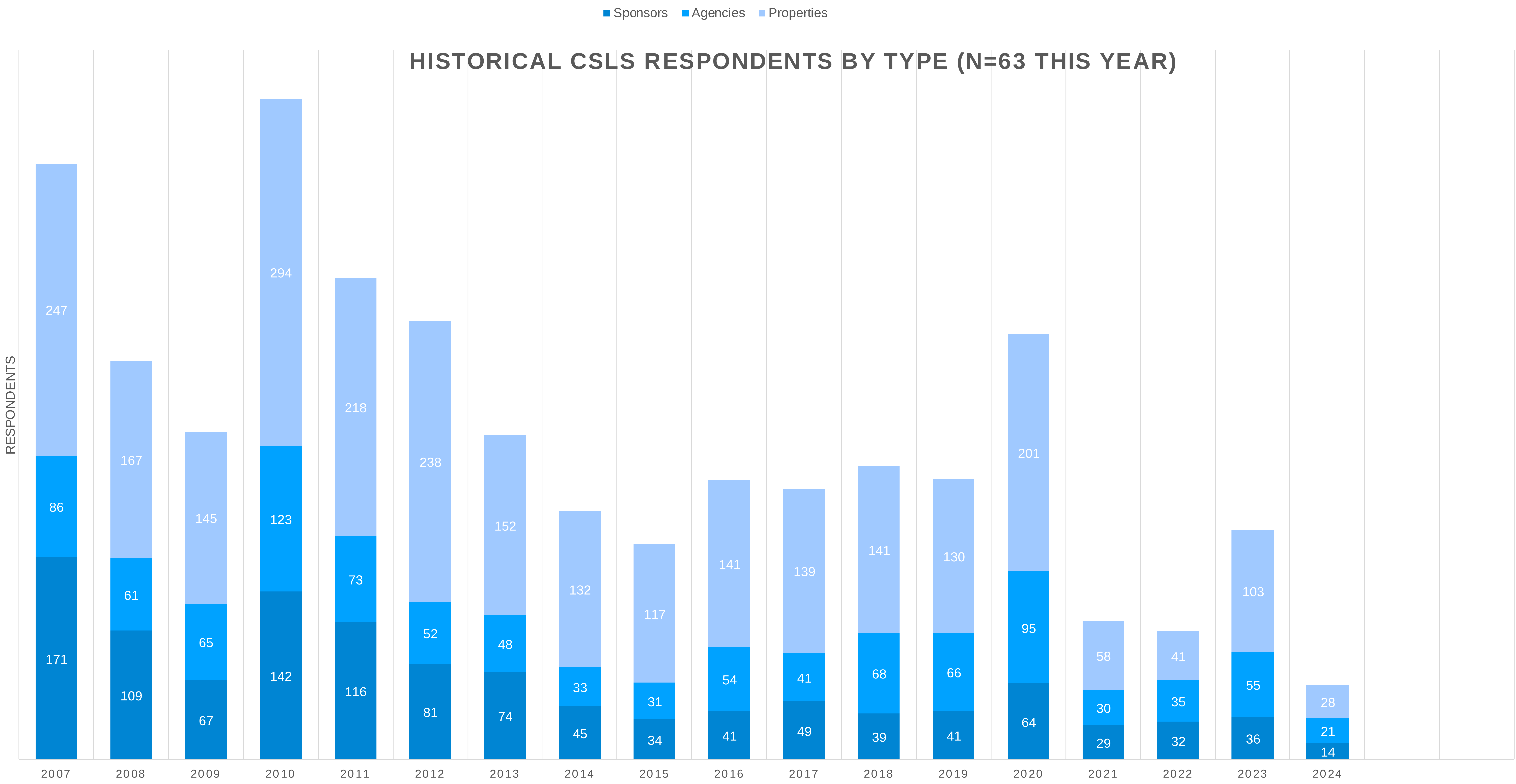
Respondents

INDUSTRY DATA

03

Size & Scope

THE SAMPLE
RESPONDENTS



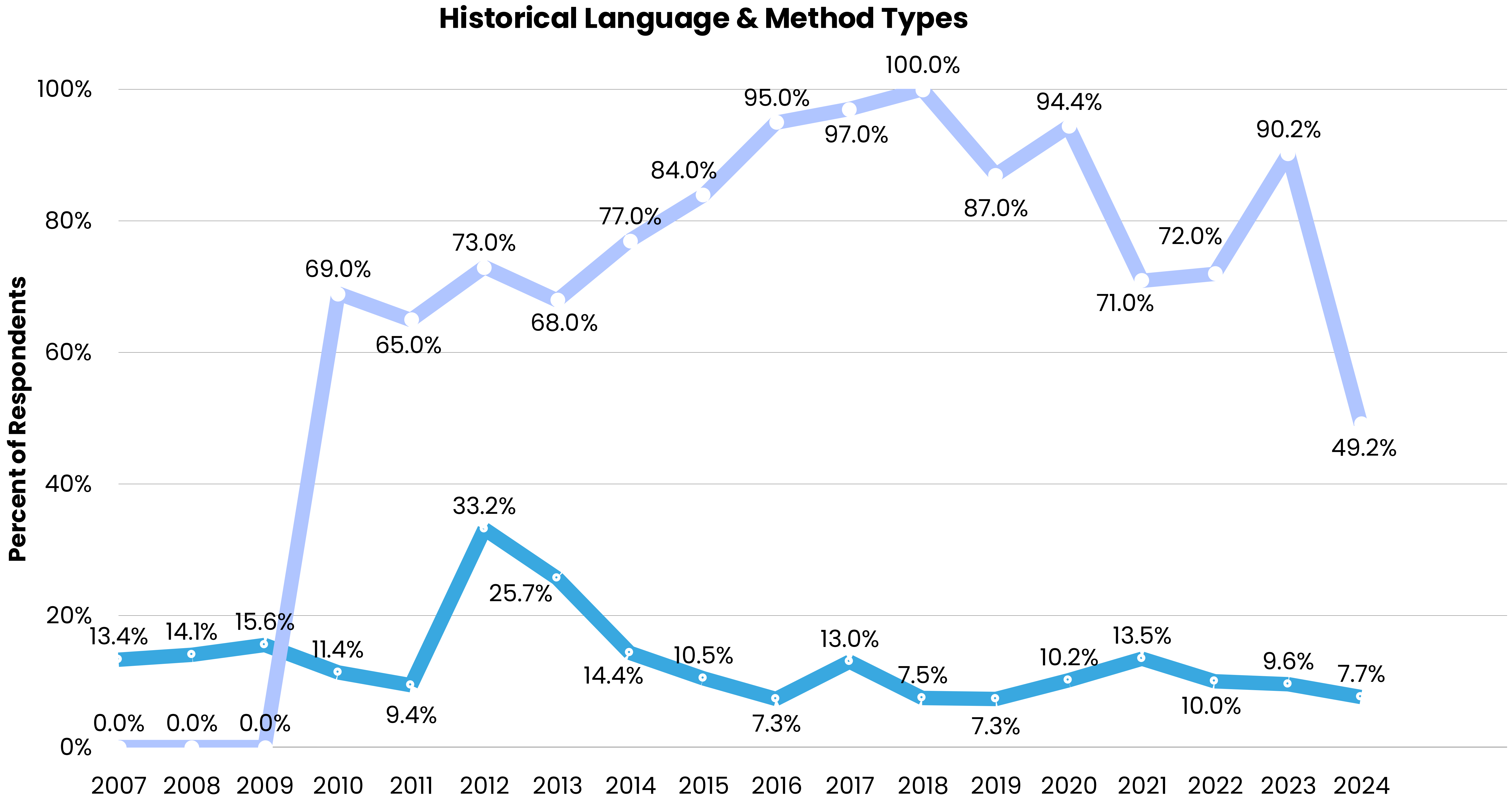
DATA

4,917
Total Respondents

NOTES

- After going online in 2010, the number of respondents continually declined until a survey redesign in 2016 led to a recent high in 2020.
- Due to a variety of reasons, recruitment was limited this year and response rates low.
- Analysis combines 2023 and 2024.

THE SAMPLE
SURVEY PARTICULARS



Legend:
Top Line: % Online
Bottom Line: % French

DATA

18 YEARS
Language & Method of Response

NOTES

- French rates rose around conference in Montreal; lower since.
- Online at 100% for first time in 2018, but some offline in the years since.
- Tough year in 2024, required direct reach outs.

THE **SAMPLE**

02

Respondents

RESULTS

INDUSTRY DATA

03

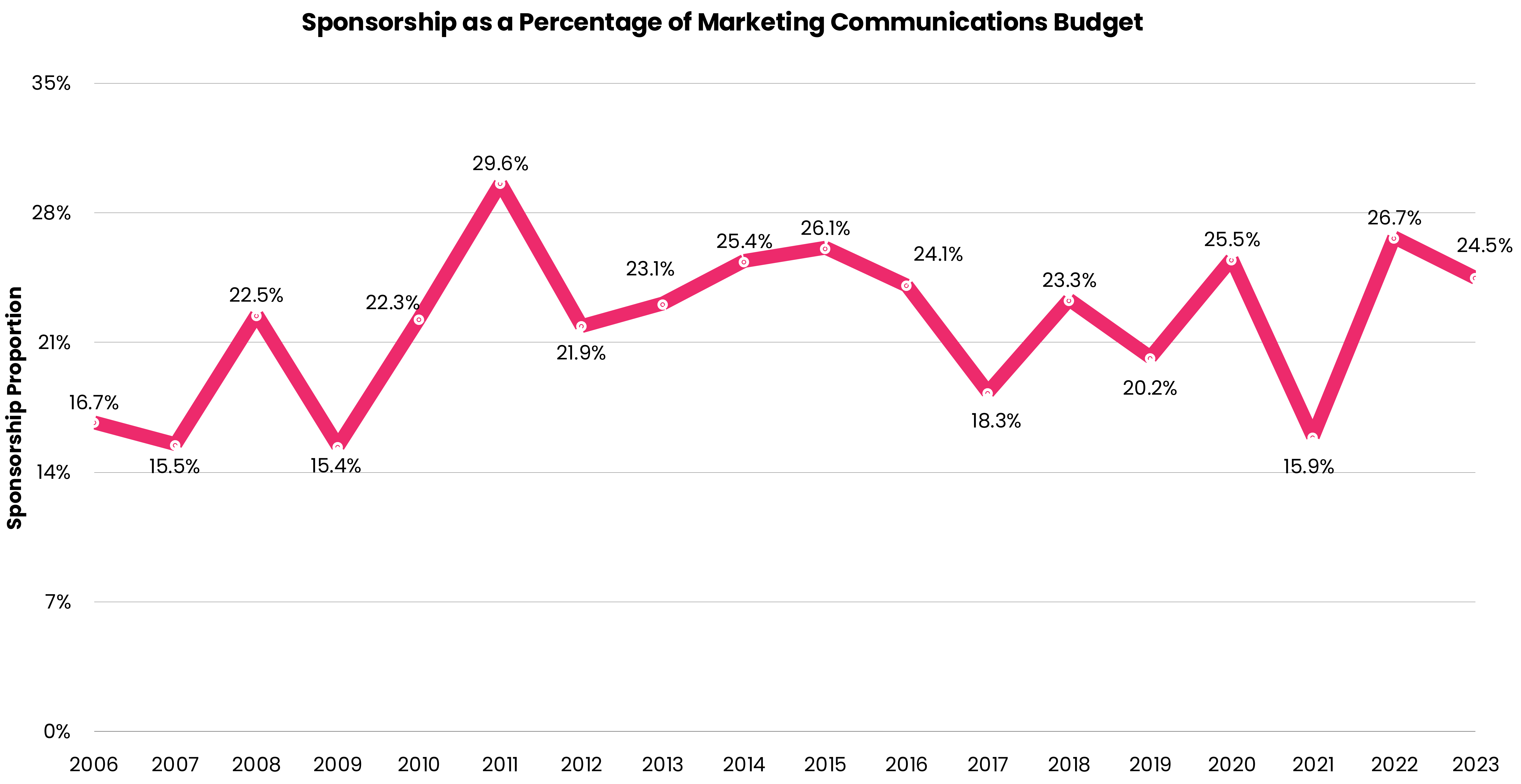
Size & Scope

RESULTS #1

04

Strategy

INDUSTRY DATA
PROPORTION OF MARCOM BUDGET



DATA

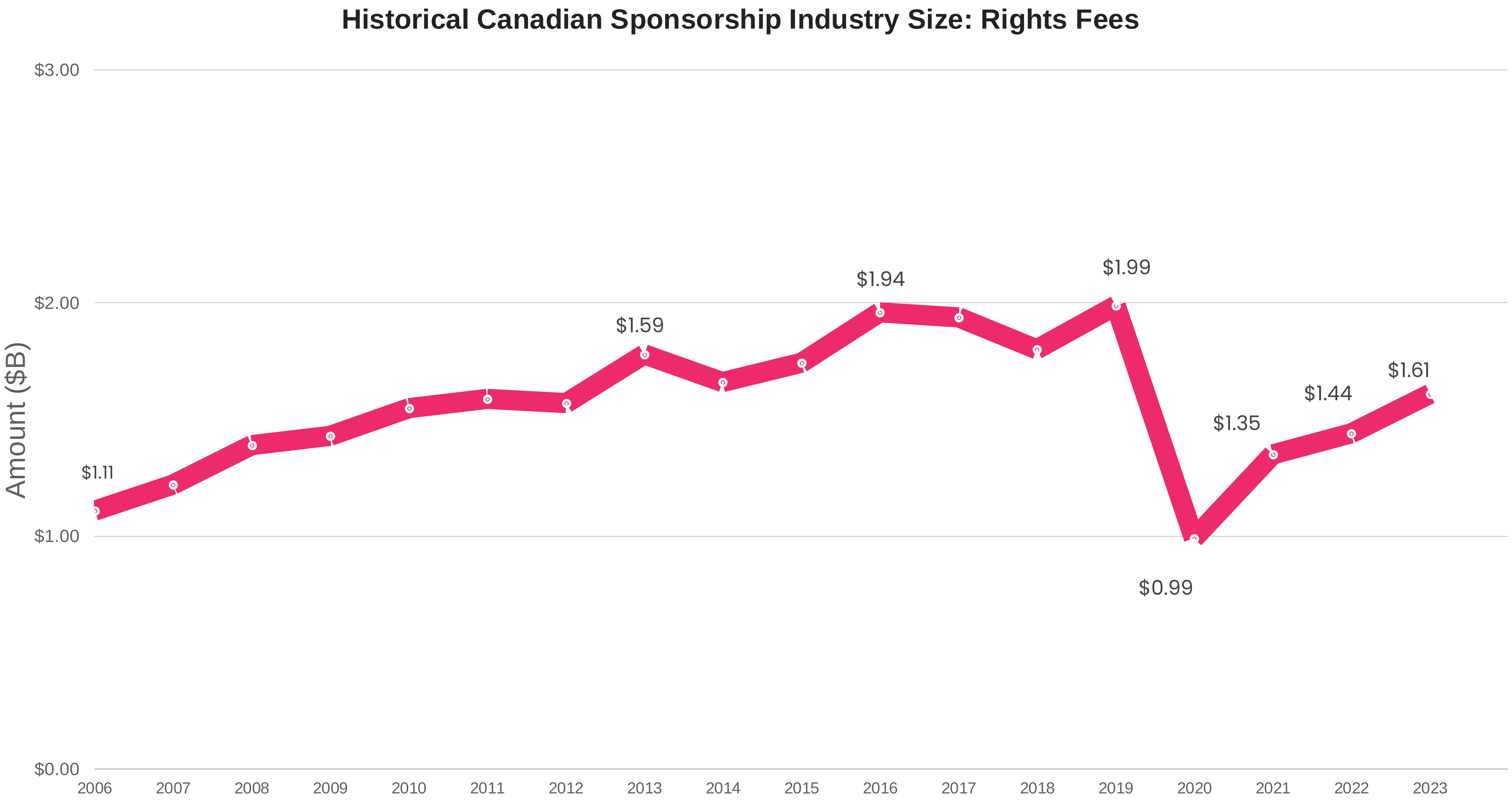
24.5%

Approximately 1 in 4

NOTES

Following a return to 'normal', sponsorship among those organizations that use sponsorship, it represents about **1 in 4 of the MarCom $'s** that they spend.

INDUSTRY DATA
BIG PICTURE: CANADIAN INDUSTRY SPEND



NOTES

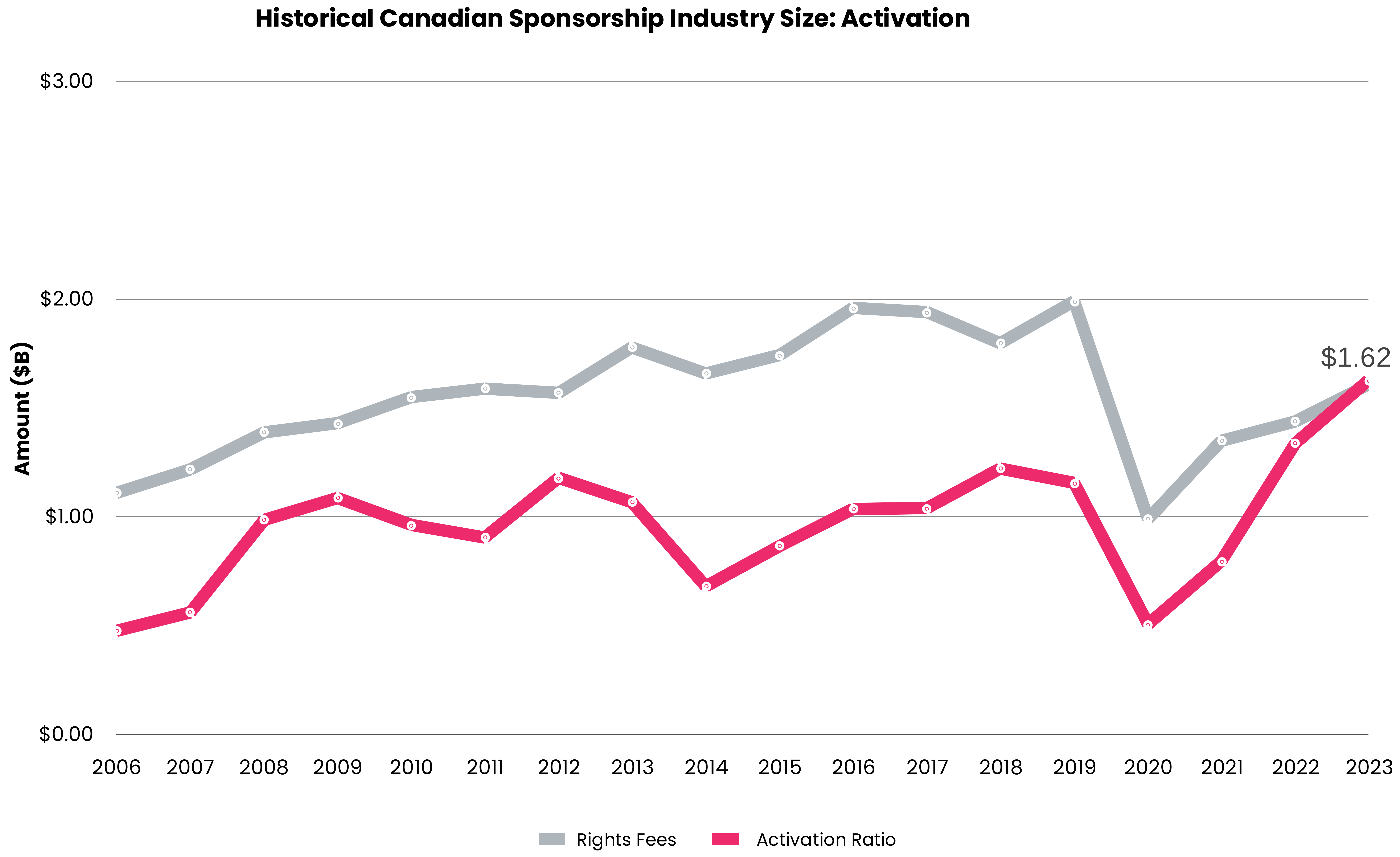
The pandemic is behind us.

DATA

$1.61B

2023 Rights Fee Spend

INDUSTRY DATA
CANADIAN INDUSTRY SIZE



DATA

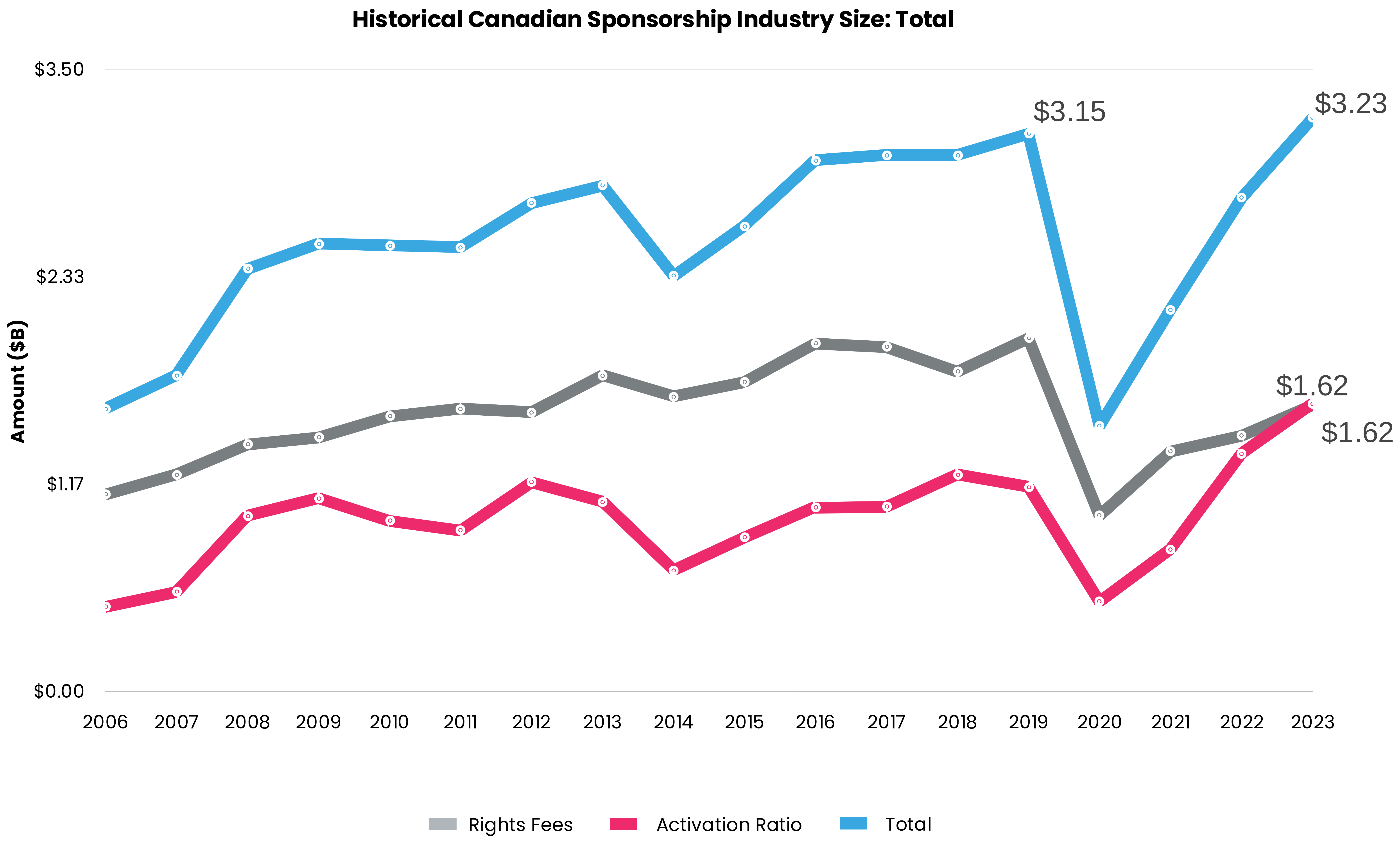
1.01

Activation to Rights Fee in 2023

KEY OBSERVATION

Key Observation: The best activation ratio we've seen in CSLS history.

INDUSTRY DATA
BIG PICTURE: CANADIAN INDUSTRY SPEND



INSIGHT

Brands who sponsor in Canada are allocating more of their investments – smartly – to activation – leading to an overall increase..

DATA

$3.23B

in Total 2023 Industry Spend

NOTES

Highest total spend, but must consider inflation and note change in how spending is happening.

INDUSTRY DATA

03

Size & Scope

RESULTS

RESULTS #1

04

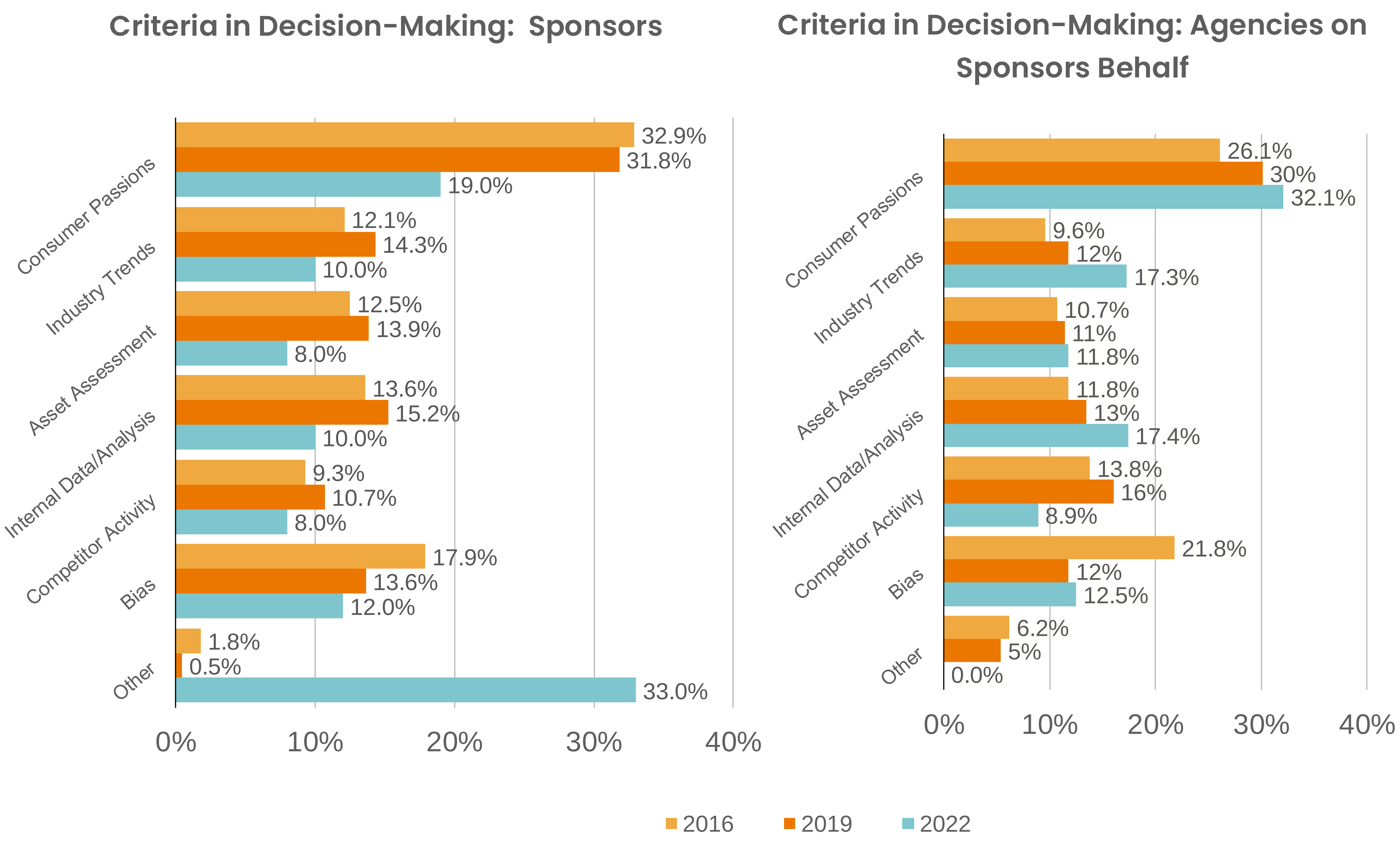
Strategy

RESULTS #2

05

The deal

RESULTS #1: STRATEGY
SPONSOR DECISION MAKING (2016, 2019, 2022)



INSIGHT

The use of "data" (trends, asset assessment, internal data) is part of 46% of decisions according to agencies' sponsor clients.

MAJOR SHIFT

- Lots of uncertainty by sponsors.
- Different view from their agencies.

NOTES ON 2022

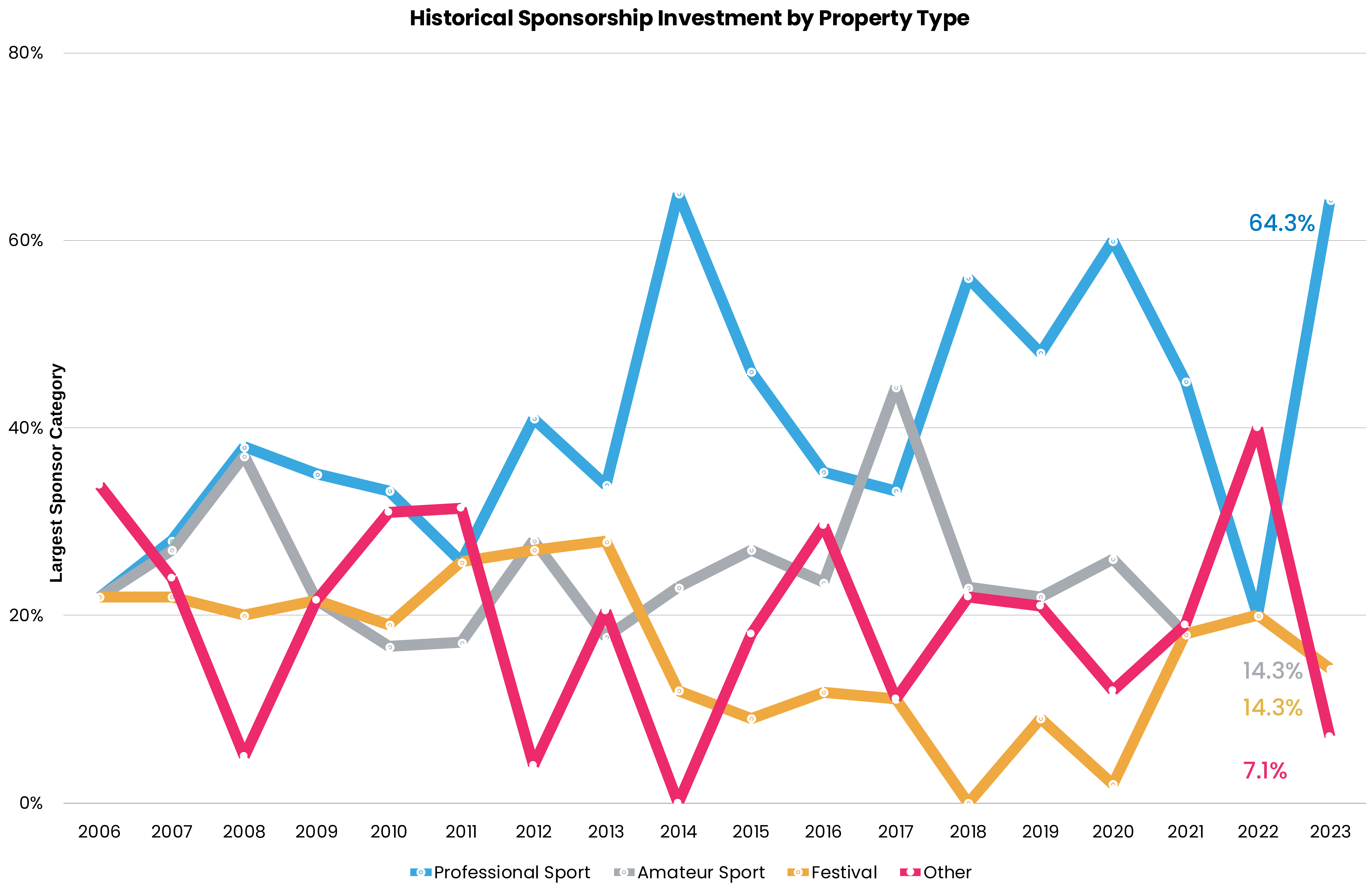
Sponsors uncertain about decisions, but focused on the 'right' criteria.

Others (for sponsors) include: aligning with business core values, client interests, internal criteria, and executive input.

Agencies emphasize consumer passions.

2023 = small sample.

RESULTS #1: STRATEGY
LARGEST SPONSORSHIP CATEGORY



64.3%
Pro Sport

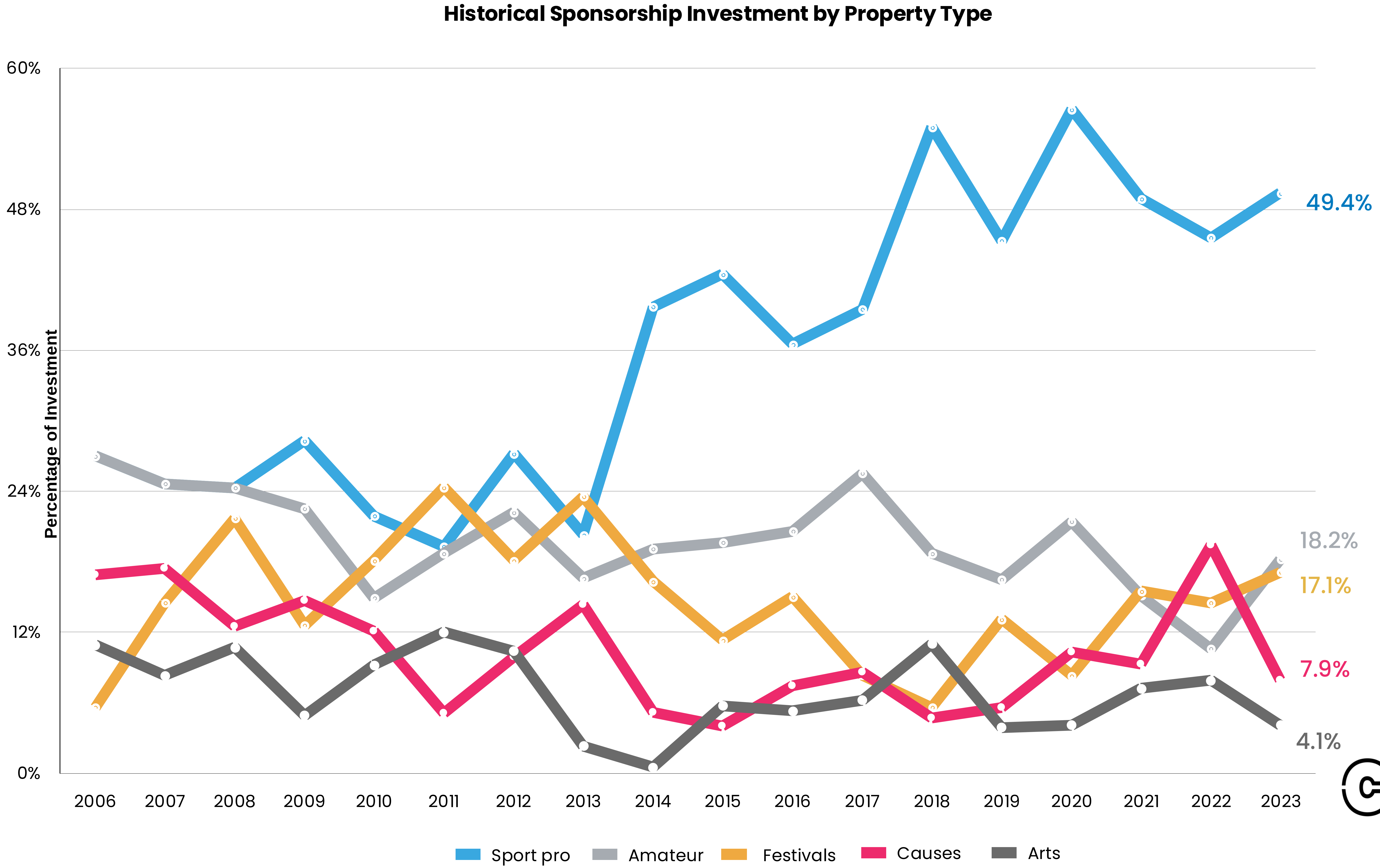
PRO SPORT

2023 Data.

Return to pro sport being dominant followed by amateur sport and festivals.

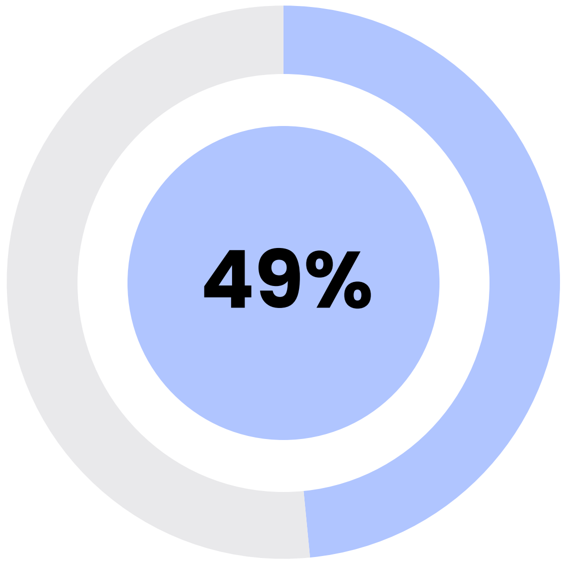
- *Due to low Sample Size in 2023, combined with 2022 data*

RESULTS #1: STRATEGY
PROPERTY MIX



INSIGHT

- *Cause increase due to change in spending or change in definition?*



DATA

Of Investment is in Pro Sport

NOTES

- Others of interest – all <1%
  - Education
  - Entertainment, Tours & Attractions
  - Media
  - Municipality
- *Due to low Sample Size in 2023, combined with 2022 data*

RESULTS #1: STRATEGY

SPONSOR INVESTMENT: PROPERTY REACH BY SPEND

INSIGHTS

International reach includes Canadian properties with a global reach.

Possible that sponsorships are increasingly being managed at a global level?

2022+2023 DATA | 2021 DATA

"Similar mix, except for a move towards more sponsorships with an international reach"

16.1% | 4.6%
International

16.4% | 19.3%
National

3.1% | 5.6%
Multi-Provincial

35.4% | 33.0%
Provincial

11.2% | 18.1%
Regional

17.1% | 19.4%
Local

NOTES

1. Gender primary targets: Men (5.8%), Women (9.1%), No Specific Gender (85.1%)
2. Type of Property: For-Profit (35.1%), Not-For-Profit (64.9%)

RESULTS #1: STRATEGY

MISALIGNED VIEWS ON THE FUTURE ON SPEND, REVENUE, BILLINGS

DECREASE

14.9%
Sponsor

5.9%
Property

0.0%
Agency

STAY THE SAME

42.9%
Sponsor

28.8%
Property

43.9%
Agency

INCREASE

42.2%
Sponsor

65.3%
Property

56.1%
Agency

PROPERTY AND AGENCY RESULTS ARE MUCH MORE POSITIVE THAN SPONSORS

Estimated increase in spend, revenue, billings:
- Sponsors +0%
- Properties +14%
- Agencies +16%

2022 + 2023 Data

RESULTS #1

04

Strategy

RESULTS #2

RESULTS

05

The deal

RESULTS #3

06

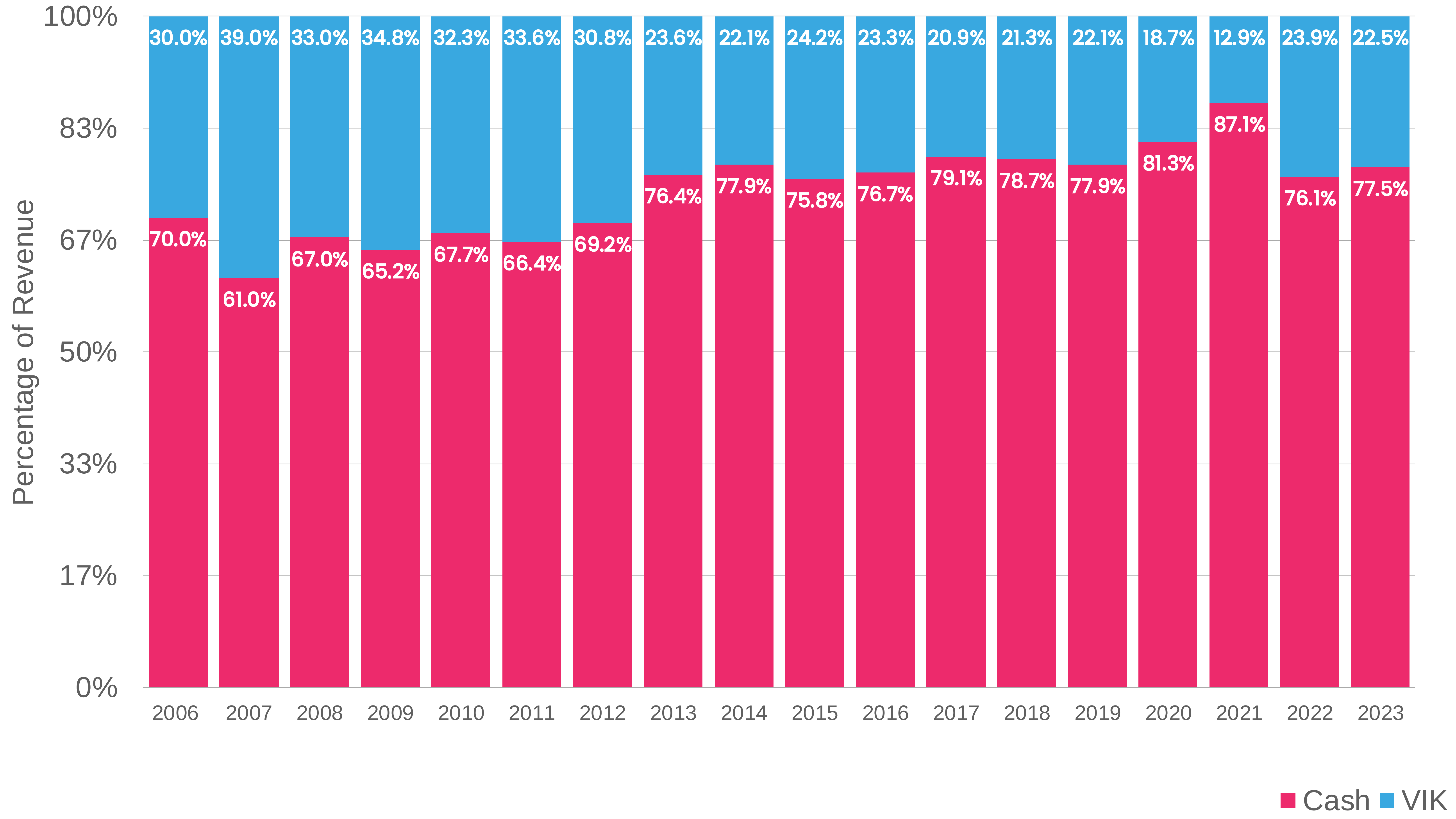
Activation

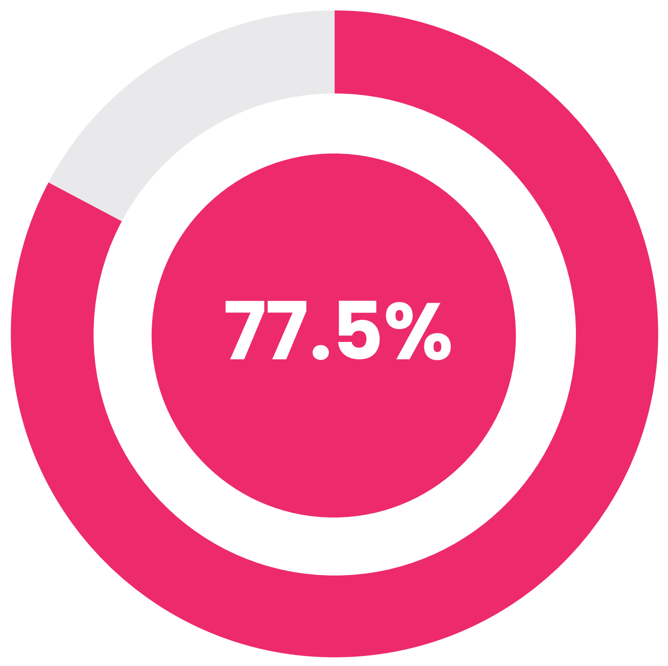
RESULTS #2: THE DEAL
CASH OR VIK

INSIGHT

VIK increasingly driven by the increase in opportunities related to the increased desire for live experiences.

Historical Cash vs. VIK Mix for Properties





DATA

Ratio for cash over VIK

NOTES

Brands focusing more on VIK investments in 2022 and 2023 over previous years.

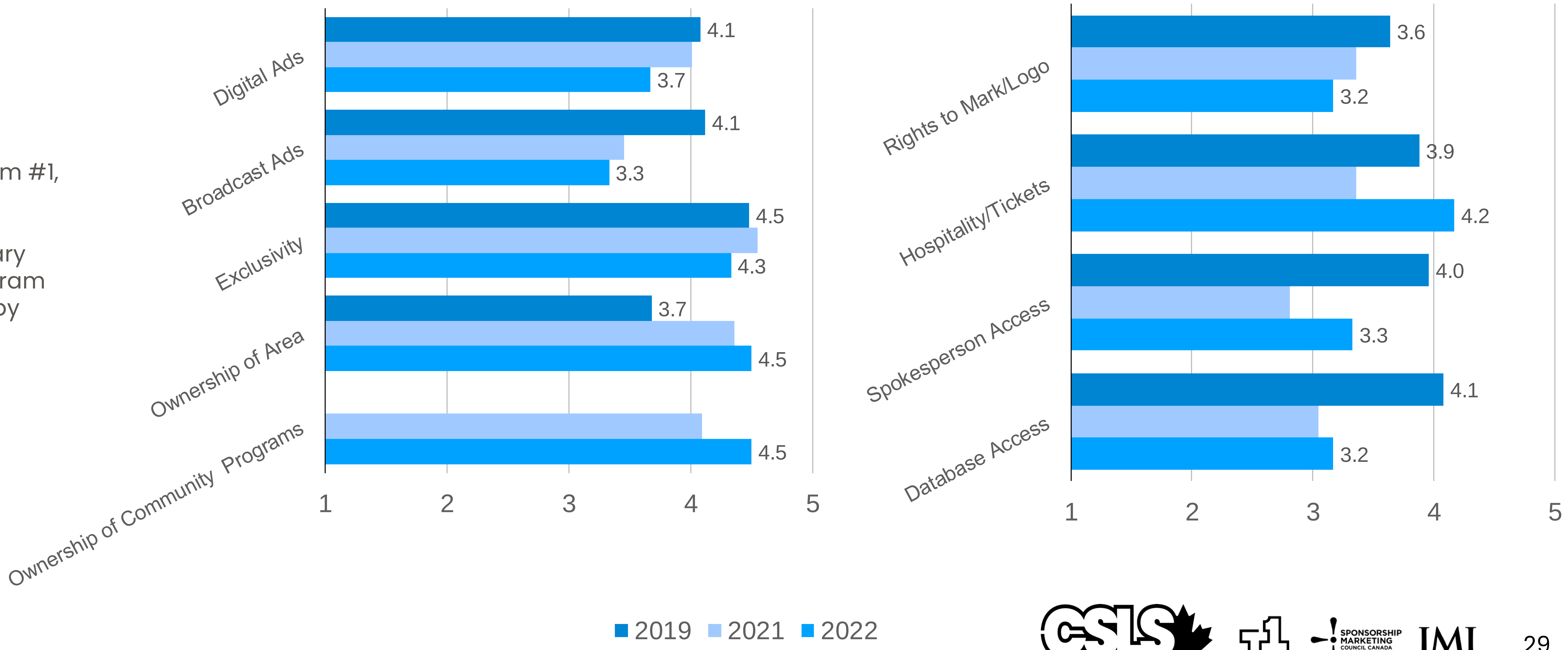
RESULTS #2: THE DEAL
VALUABLE BENEFITS

Most Valuable Benefits Identified by Sponsors

DATA & NOTE

Compared to 2019 (pre-COVID)

- Exclusivity dropped from #1, but remained strong.
- Ownership of proprietary area/community program top benefits, followed by hospitality and tickets.
- 2023 data limited.



RESULTS #2: THE DEAL

PROPERTY LARGEST SPONSOR & AGENCY LARGEST CLIENT (2022 + 2023 DATA)

Largest Sponsor
Avg : $1.15M
Range: $5k to $6.5M

25.6%
Retail

12.8%
Gambling/Betting

22.9%
Finance

9.9%
Manufacturing

16.2%
Services

Largest Client
Avg : $925k
Range: $95k to $4.2M

For 62.5% of agencies, it was a sponsor client.
For 37.5% of agencies, it was a property client.

50%
of largest agency clients were from the financial services sector. Retail next at 25%.

INSIGHT
Rise of gambling/betting.

RESULTS

RESULTS #2

05

The deal

RESULTS #3

06

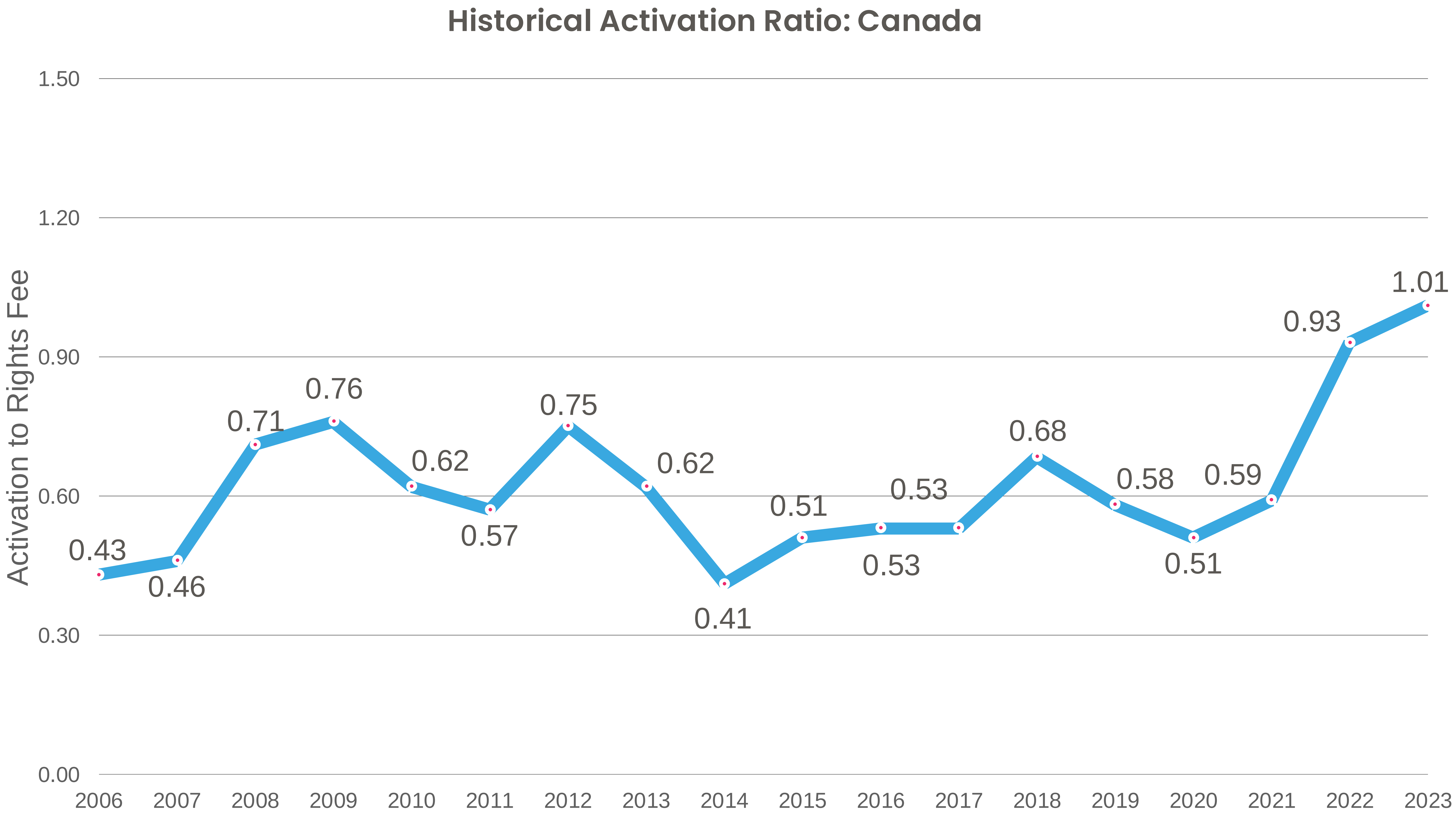
Activation

RESULTS #4

07

Servicing

RESULTS #3: ACTIVATION
THE RATIO



INSIGHT

Continued increases in activation since the pandemic.

DATA

1.01

Activation to Rights Fee in Canada

Highest ever recorded in 2023.

NOTES ON 2022 and 2023

Very exciting results as the return to sponsorship could be characterized by a more sophisticated use of investment by brands.

IEG measured US activation rates until 2020, typically more than a 2:1 ratio.

RESULTS #3: ACTIVATION
MIX OF INVESTMENT

BIG CHANGE

Hosting & Hospitality is back
Web3 zero

Sponsor Reporting of Activation Spend in 2022/2023*
(2021 noted for each)

19.9% ↑
Hosting & Hospitality
8.0%

17.1%
Social Media
12.5%

17.5%
Advertising
23.0%

15.2%
Branded Content
21.3%

7.8%
Ancillary Events
8.9%

6.8%
Co-Promotions
9.0%

3.6%
Internal Marketing
3.5%

3.5%
Athletes
3.8%

2.2%
PR
4.1%

1.8%
Sales & Consumer Promotions
5.4%

0.6%
Product Sampling
0.3%

0.1%
Packaging
0.0%

0.1%
Trade Allowances
0.0%

0.0%
Web3
0.0%

*Low sample size for 2023

RESULTS #3: ACTIVATION
MIX OF INVESTMENT

Agency List of Sponsor Client Activation Spend in 2022/2023*
(2021 noted for each)

OBSERVATION (SAME AS LAST YEAR)

Drastic difference from sponsor mix; evidence that agency role changes activation.

INSIGHT
Branded Content is Back

- **20.9%** ↑ Branded Content (6.2%)
- **15.0%** Advertising (16.7%)
- **11.4%** Product Sampling (7.2%)
- **10.4%** Social Media (11.5%)
- **8.0%** PR (6.9%)
- **7.4%** Other (18.1%)
- **6.4%** Hosting & Hospitality (8.9%)
- **5.9%** Athletes (7.7%)
- **3.7%** Packaging (0.5%)
- **3.6%** Co-Promotions (3.2%)
- **2.9%** Sales & Consumer Promotions (5.5%)
- **2.6%** Internal Marketing (4.5%)
- **1.2%** Ancillary Events (3.0%)
- **0.4%** Trade Allowances (0.0%)
- **0.1%** Web3 (0.0%)

*Low sample size for 2023

RESULTS #3: ACTIVATION

DRIVERS OF ROI – SPONSOR VS. PROPERTY VIEW

SPONSOR ROI RANKING

#1
Branded Content (25%)

#2
Social Media (19%)

#3
Hosting/Hospitality (19%)

#4
Advertising (12%)

#5
Public Relations (12%)

PROPERTY ROI RANKING

#1
Branded Content (26%)

#2
Sales Promotion (17%)

#3
Co-Promotions (14%)

#4
Advertising (14%)

#5
Social Media (12%)

ROI RANKING

COMMON #1

- Common on branded content, but differ on others considerably
- For sponsors, hosting/hospitality provides a platform for generating leads/driving sales.
- For both, branded content and social media are easier to measure.

2022 Data

RESULTS #3: ACTIVATION
SPONSOR: INVESTMENT VS. ROI ALIGNED

Statistical significance between the assets that sponsors choose to invest in and those that they view as most impactful drivers of ROI.

CORRELATION

r = .828

Correlation between Sponsor Spend and Sponsor view of ROI by activation tactic.

Significant at the p<.001 level

CROSS TABULATION

Linear Association = 9.604

Linear-by-Linear Association between Sponsor Spend and Sponsor view of ROI by activation tactic.

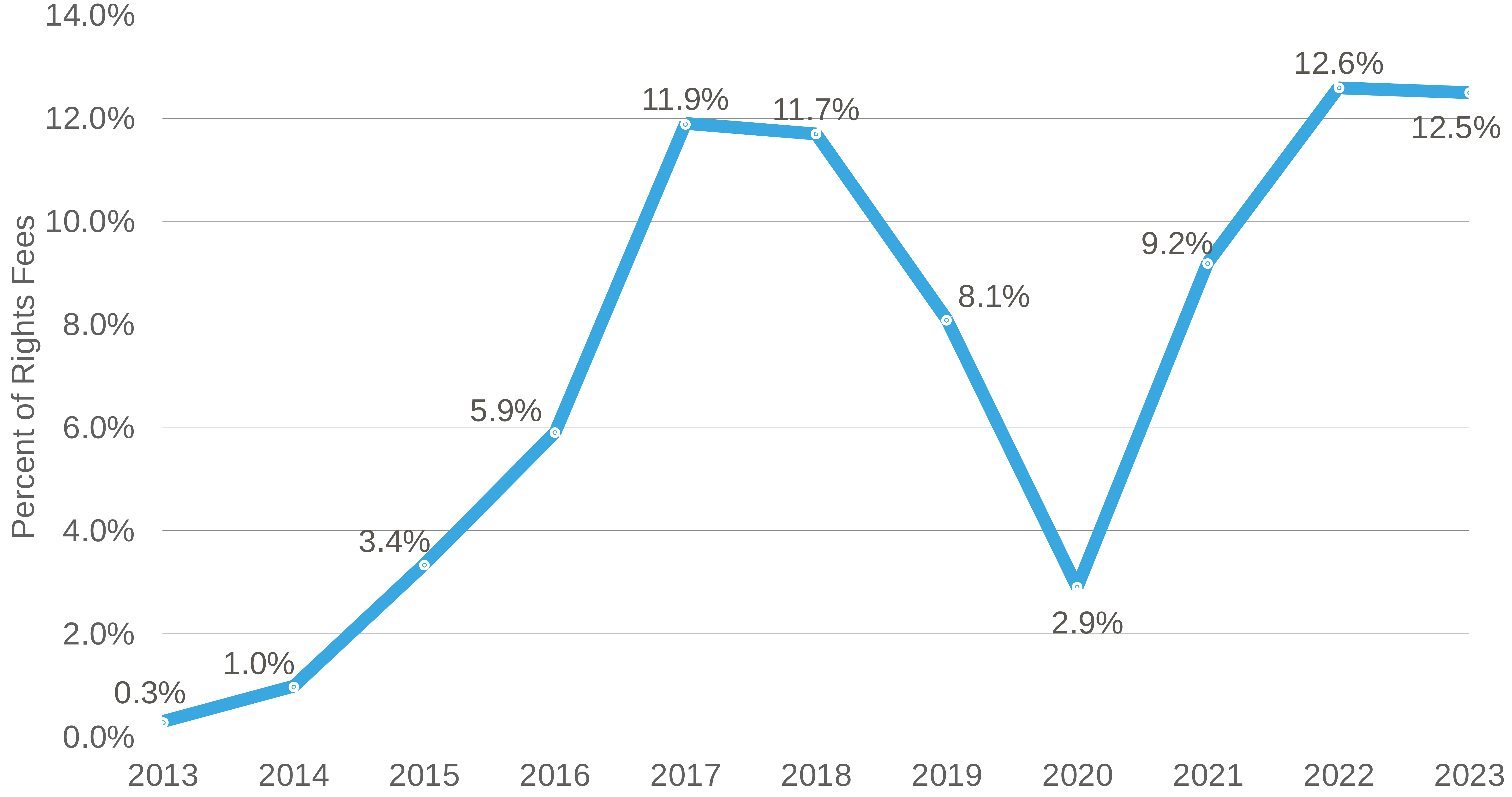
Significant at the p<.005 level

INSIGHT

Sponsors are spending where they think ROI is possible

RESULTS #3: ACTIVATION
PROPERTY ACTIVATION

Property Reinvestment of Rights Fees in Activation



INSIGHT

This increased reinvestment, in 2022 and 2023, plus the reduced number of respondents reporting no reinvestment, and increased activation ratio, the has been a shift in how brands and properties understand activation -> a good thing for the industry.

DATA

12.5%

Reinvested by Properties in Activation

NOTES (from 2022 data)

Only 11% of respondents reported no re-investment in activation in 2022 (down from 33% in 2021). Limited sample in 2023.

Most Common Tactics (all similar volume) in 2022
#1 - Branded Content
#2- Social Media
#3 - Advertising
#4 - Branded Content

RESULTS #3: ACTIVATION
AGENCY VIEW ON SPONSOR ACTIVATION PRIORITIES

In your experience developing sponsorship strategies with your clients, what are the three most common activation objectives that sponsors seek?
*Percentages indicate the proportion of total responses provided captured by each theme.

INSIGHT

42.1% directly related to sales (sampling, ROI/intent/sales, brand consideration).

21.1%
Sampling, Trial, & Lead Generation

15.8%
Awareness & Brand Recognition

15.8%
Brand Engagement

10.5%
ROI, Purchase Intent & Sales

10.5%
Increasing Brand Consideration

7.9%
Hybrid Creative Activations

5.3%
Hosting & Hospitality

2.6%
Social Media

2.6%
PR

2.6%
Leveraging Talent in Brand Campaigns

2.6%
Corporate Social Responsibility

2.6%
Strategic Alignment

RESULTS #3

06

Activation

RESULTS

RESULTS #4

07

Servicing

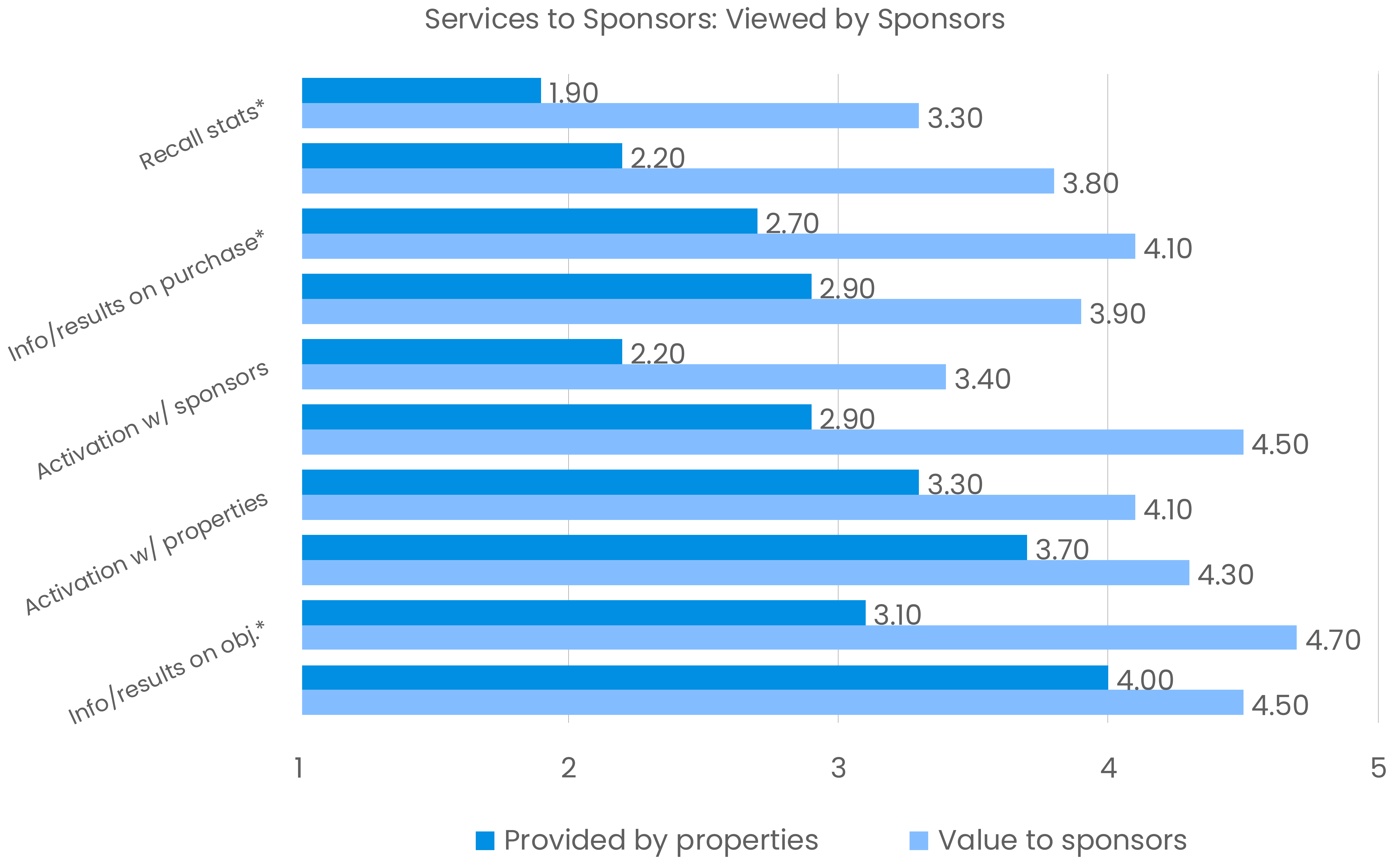
RESULTS #5

08

Evaluation

SERVICING

SPONSOR PERSPECTIVE – 2021, 2022, 2023 DATA COMBINED*



DATA

10 of 10

are Statistically Significant Differences (*)

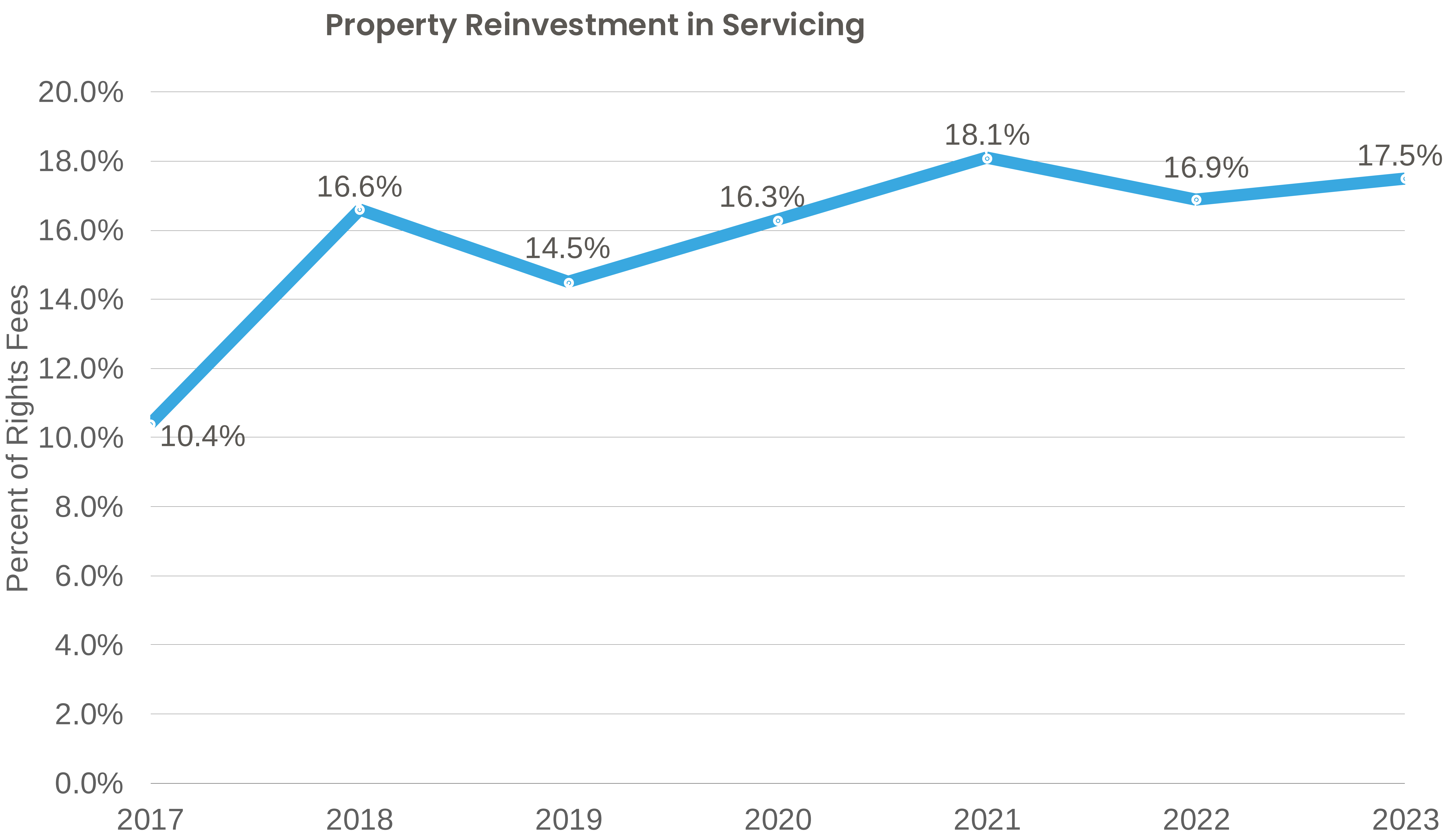
NOTE

- The servicing issue remains in Canadian sponsorship.
- This has been consistent for 18 years, with a few exceptions.

*Low sample size for 2022 and 2023

SERVICING

PROPERTIES INVESTMENT EXPANDS FROM PRE-COVID



Servicing

% of sponsorship revenue that is allocated to servicing

100%

of property respondents reported investing in servicing.

Very positive finding.

RESULTS #4

07

Servicing

RESULTS

RESULTS #5

08

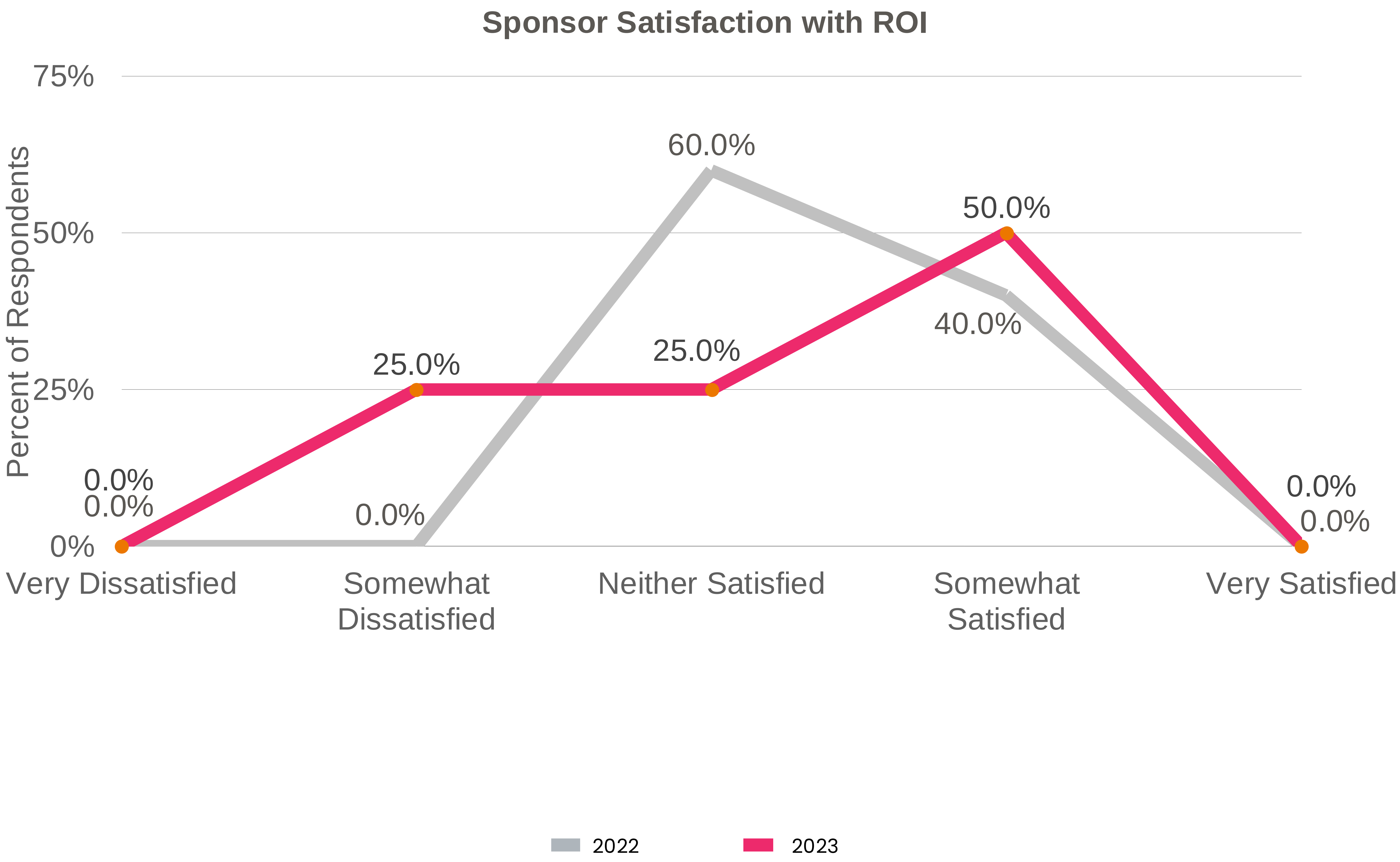
Evaluation

DISCUSSION

09

So what?

RESULTS #5: EVALUATION
PROPERTY VIEW OF SPONSORSHIP ROI



DATA

3.6 (out of 5) Sponsor Mean (combined results for 2022 & 2023)

NOTE

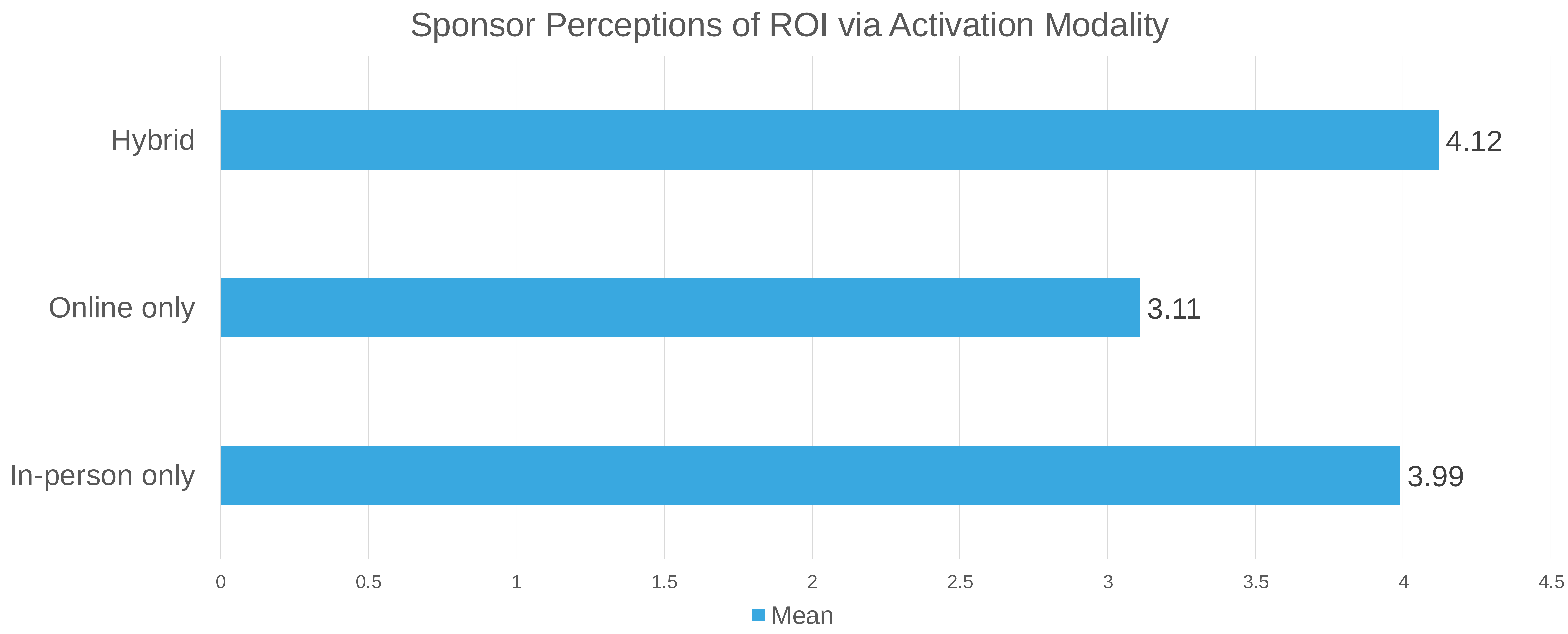
Sponsor result on ROI improved over 2021 (3.5) and 2020 (2.8)*

Very moderate response, none at extremes

RESULTS #5: EVALUATION
PROPERTY VIEW OF SPONSOR'S PERCEPTION OF ROI

INSIGHT

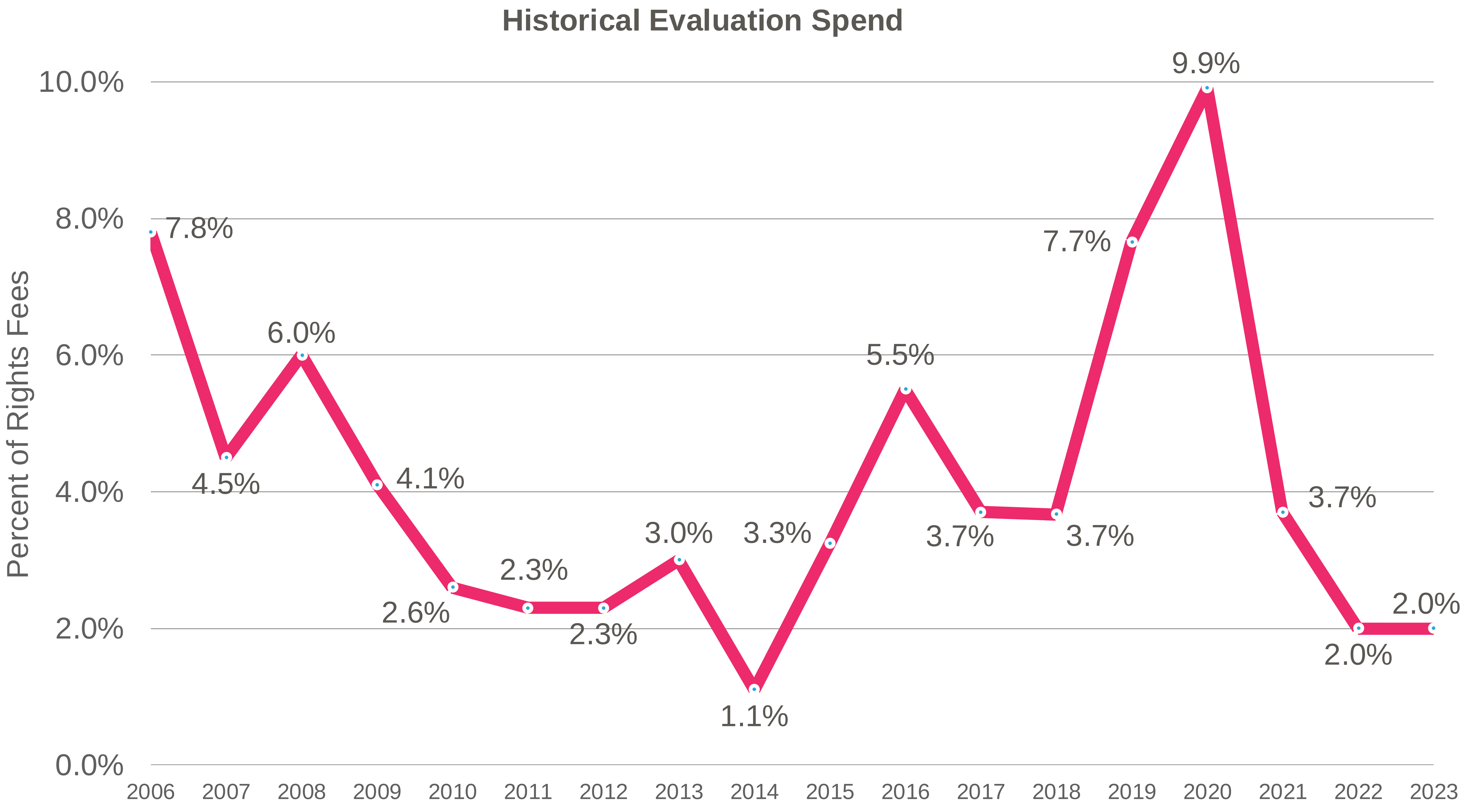
Sponsors want both



2022 and 2023 Data Combined

RESULTS #5: EVALUATION

EVALUATION INVESTMENT BY SPONSORS



Pre-evaluation: *10.6% 3.6% 12.6% 8.5% 9.7% 15.1% 9.5% 16.0%*

INSIGHTS

- Despite being a major concern in sponsorship, investment drops here.
- Is evaluation becoming more efficient?
- Or, are sponsors delegating evaluation work to their agencies?

DATA

2.0%
of Rights Fee
Spent on evaluation (note this is average by sponsor, not weighted for sponsor size)

NOTE

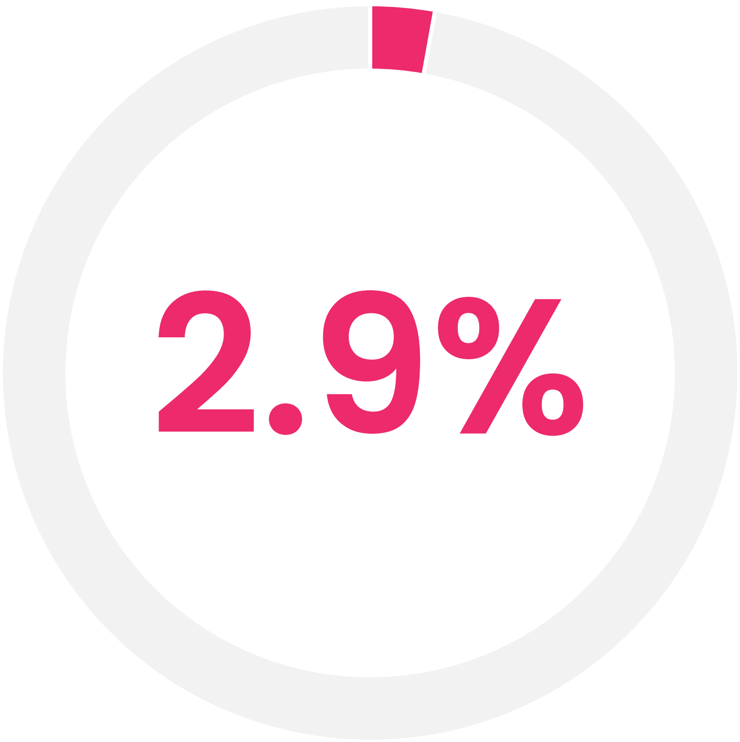
- Return to 2009 to 2015 levels.
- **25%** reported spending nothing on evaluation in 2022 and 2023.
- Pre-Sponsorship evaluation spend rose to 16.0% (highest to date) in 2022 and 2023.

INSIGHT

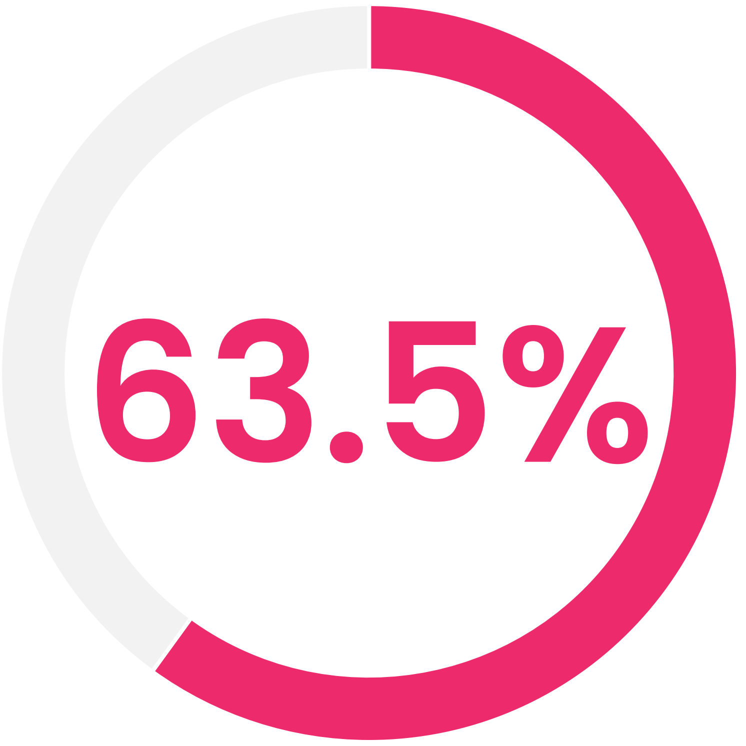
- Results lead us to ask who is accountable for evaluation? Have brands delegated to agencies, thereby leaving properties to focus more?
- Properties have access to important data sources for evaluation (e.g., audiences, unique content).

RESULTS #5: EVALUATION
PROPERTY EVALUATION

EVALUATION INVESTMENT

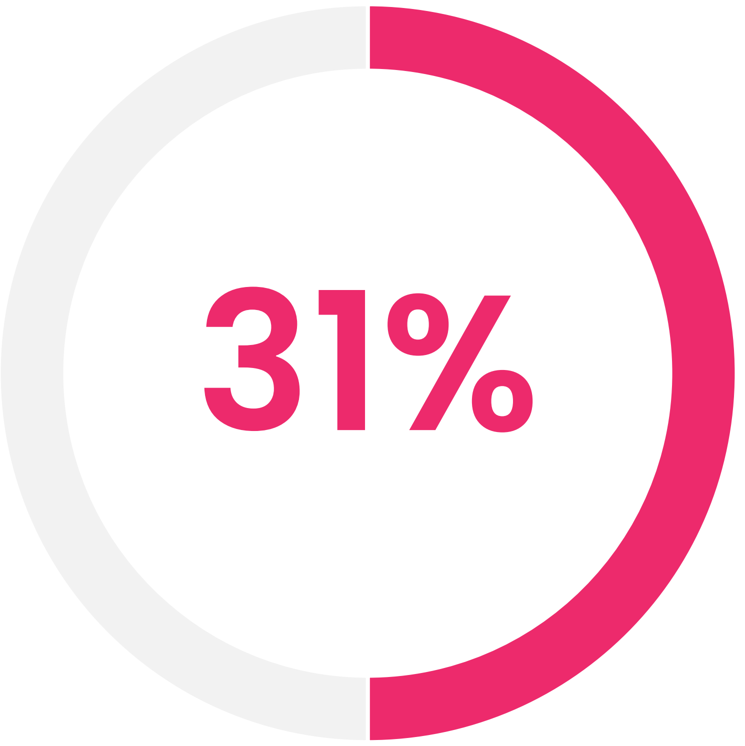


Proportion (on average) of sponsorship revenues invested in sponsorship evaluation
*2021 result: 2.9% (no change)

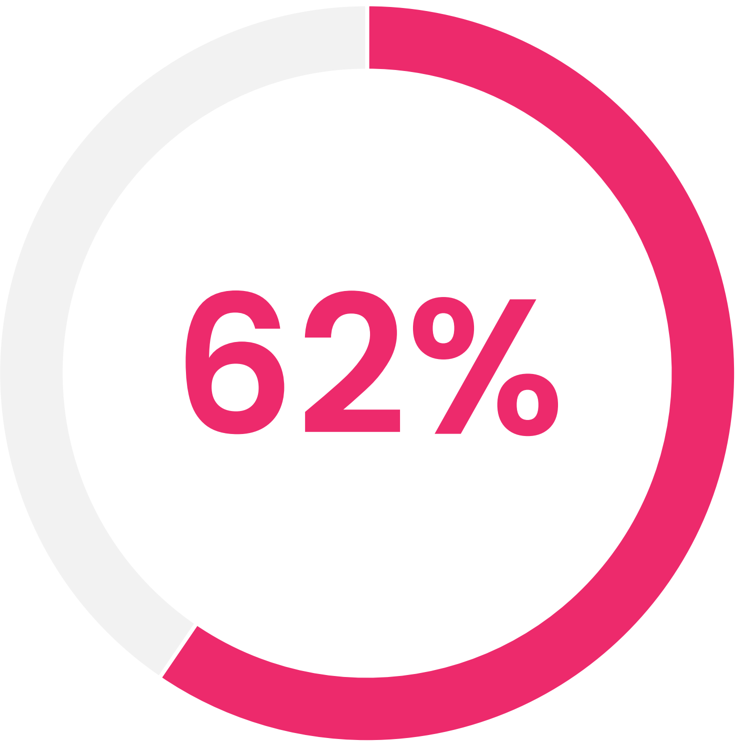


Proportion (on average) of those dollars allocated to pre-sponsorship evaluation
*2021 result: 7.1%
*Positive Change

TRENDING



Spent zero on sponsorship evaluation
*2021 result: 50%



Spent zero on pre-sponsorship evaluation
*2021 result: 68%

2022 and 2023 Data Combined

RESULTS #5: EVALUATION
AGENCY VIEW OF EVALUATION PRACTICE OF SPONSOR CLIENTS

TECHNIQUES AND MEASURES USED TO DEMONSTRATE ROI TO CLIENTS

COMMONLY MENTIONED TECHNIQUES & MEASURES		
Custom/sponsor's choice/property defined	Internal tracking of sales/KPI's	External tracking tools (media, PR, social)
Third party research (e.g., research agencies)	Impressions	Survey data
Post event reports/audits	Media rating points (MRP) results	Lead generation/new contacts
Demographics	Sponsorship recall (aided & unaided)	Social media impressions
Mentions in the press		

2022 and 2023 Data Combined

RESULTS #5

08

Evaluation

RESULTS #6

RESULTS

09

Property Reinvestment in Sponsors

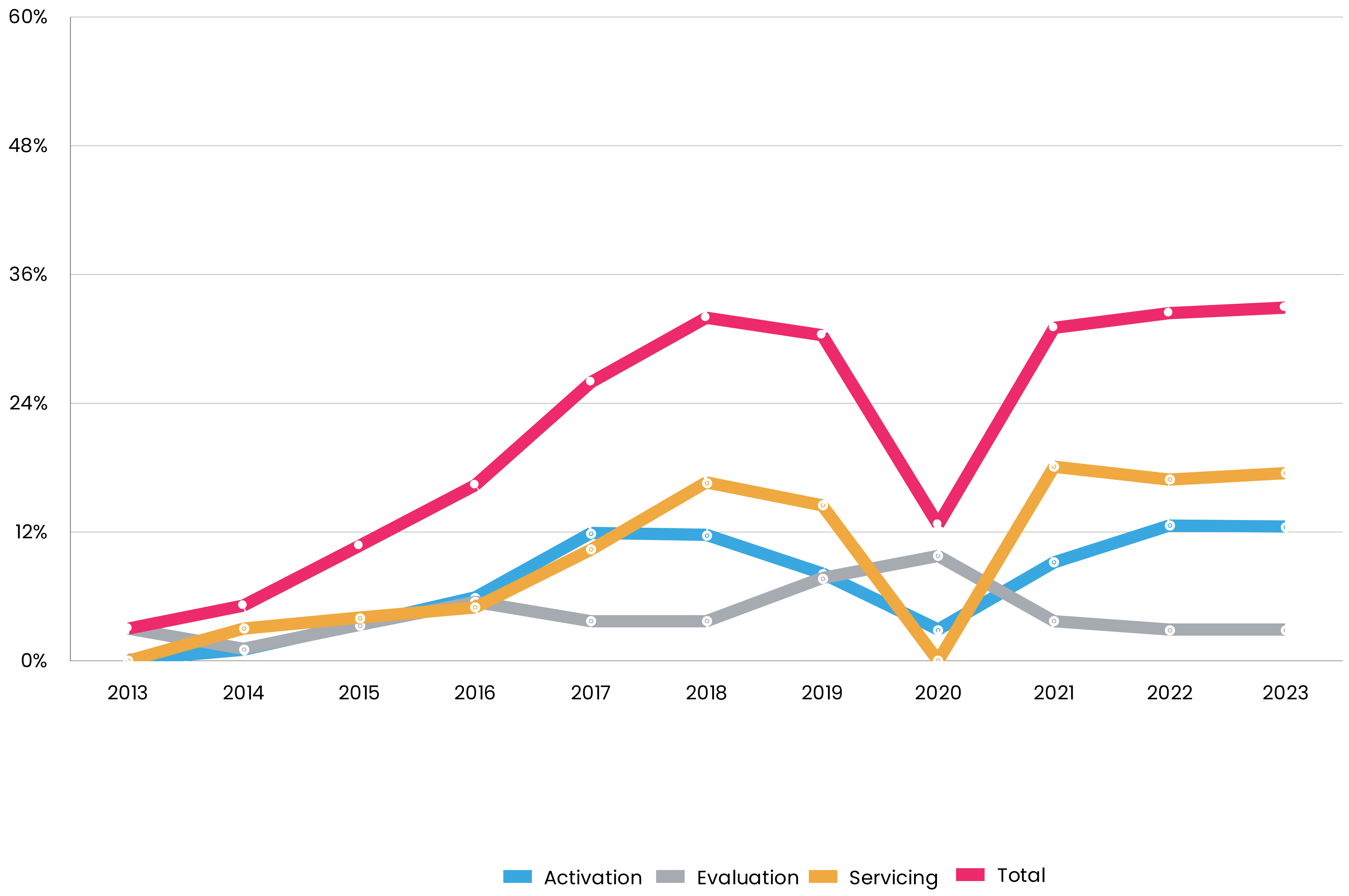
DISCUSSION

10

So what?

RESULTS #6:
PROPERTY REINVESTMENT

Historical Re-investment in Activation, Evaluation and Servicing by Properties



DATA

32.9%

of rights fees received are being reinvested in the sponsorship, through a combination of activation, evaluation and servicing.

NOTE

- Property reinvestment stabilizing at around 1/3rd of rights fees received.

RESULTS #5

08

Evaluation

RESULTS #6

09

Property Reinvestment in Sponsors

DISCUSSION

SUMMARY

10

Deep dives & conclusion

EVALUATION
WHAT KEEPS US UP AT NIGHT?

TOP CONCERNS	Meeting Targets*	Demonstrating ROI	Demonstrating ROI	Other*	Demonstrating ROI	Demonstrating ROI	Meeting Targets** Evaluation/Measure	Fear about delivering value as ROI	Analytics/ Evaluation/ Measurement/ROI	Measurement	Measurement & Economic Uncertainty	Measurement
YEAR	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023

*Demonstrating ROI #2
**Demonstrating ROI #3

SPONSORS

- ROI/Measurement – "Demonstrating the value of sponsorship to senior leadership"
- Changing Market/Inflation/Rising Costs – "Ensuring that our portfolio provides the flexibility to adapt to, and help address constantly/rapidly evolving business needs."
- Working with the right Properties – "Are there great organizations out there we're not finding?"

PROPERTIES

- Competition – "Increasing number of competitors seeking sponsorship dollars."
- Measurement– "How to show our partners that it is worth renewing."
- Clutter – "Increasingly too much clutter."

AGENCIES

- ROI/Measurement – "Measuring ROI outside of brand marketing such as revenue and impact meaningfully."
- Internationalization – "International activations and delivery capabilities."
- Turbulent environment – "Identifying shifts in strategies and relevant data to support decision making"

DISCUSSION: SO WHAT?
FUTURE OF SPONSORSHIP

What gives you hope about the future of sponsorship in Canada?

SPONSORS

Recognized Value

"That people are finally seeing it as a valuable tool to promote a brand"

" Data proves that sponsorship marketing added to the marketing mix strategies works to build brand affinity and consideration."

"...from an upper funnel perspective, sponsorship works. We see considerably greater brand consideration from those who know we sponsor [sport] and even higher from those who have experienced one of our events"

PROPERTIES

Purpose-Driven Partnerships

"Purpose-led partnerships are growing in popularity. Brands are recognizing the importance of social impact and making real difference in today's society given the need for change and equity, plus the public's awareness of issues and willingness to discuss"

"A trend towards alignment and partnerships and less of 'what do I get?'"

"Hoping for greater focus on values-based investments from sponsors vs. solely for profit motivated investments"

2022 Data

DISCUSSION: SO WHAT?
PAIN POINTS: AGENCY POV

What is the main pain point and/or business objective that sponsorship helps your sponsor clients meet?

AWARENESS

"Brand awareness and interaction with audiences"

"Visibility and goodwill towards the community"

"Generating positive awareness and affiliation for our clients"

"Exposure to new audiences"

"Augmenter la notoriété de la marque : La commandite peut aider les entreprises à augmenter leur visibilité auprès de leur public cible en associant leur marque à des événements, des équipes ou des individus populaires"

(Increase the value of the brand: Sponsorships can help brands build their visibility in their target markets through events, teams and celebrities)

REVENUE GENERATION

"Our clients are in the entertainment business and sponsorships bring in revenue, which helps keep pricing down"

"Financial support. Without sponsor dollars, the event quality drops. This in turn makes it harder to get sponsor dollars and a downward spiral begins"

DISCUSSION: SO WHAT?
SERVICE VALUE

What service do you provide to your sponsorship clients that they find most valuable?

CUSTOM STRATEGY

"La stratégie de commandite : L'élaboration d'une stratégie de commandite personnalisée en fonction des objectifs et des besoins spécifiques de chaque client peut être extrêmement précieuse pour les clients."

(Sponsorship strategy: The development of a custom strategy based on objectives that is extremely previse is vital for our clients)

CREATIVITY

"Creatively breaking through the clutter and getting noticed where properties have many or multiple brand partners"

"Unique ways to activate"

MEASUREMENT

"Valuation and measurement"

"Evaluating sponsorship opportunities"

"Sponsorship audits post event"

"Asset valuations"

DISCUSSION: SO WHAT?
SERVICE VALUE

What is the most valuable skill or behaviour for a new grad or professional to have entering sponsorship in Canada?

SPONSORS

Organizational & Dynamic

"Sponsorship is always juggling 15 balls at once and the ability to not drop one is essential"

"Being able to be an adaptable and dynamic thinker to have the ability to work on various platforms and projects"

PROPERTIES

People Skills

"Ability to connect with people and foster professional relationships"

"Networking and relationship development"

"Ability to communicate in a variety of forms as each partner has a different preference"

"The understanding or ability to connect the companies brands with a potential sponsor to then create a meaningful partnership"

AGENCIES

Strategic Mindset

"Willingness to take the time to cultivate a partnership"

"Thinking strategically on how the sponsorship best works for all parties"

"Ability to work with data to identify insights, feed into strategy"

2022 Data

SUMMARY

LEARNING FROM THE 18TH ANNUAL

1.01

In the words of a respondent: "I believe that all parties (brands, properties, agencies) are getting *smarter* in how they activate and drive value from sponsorship, which will continue to push the industry forward and ensure dollars flow into sponsorship versus other channels"

- Rights fees and activation equal.
- Activation growth driven by experiential activities characterized by high engagement and results-driven tactics. Most common are (i) hosting/hospitality, (ii) branded content, and (iii) sales promotions.
- Agency work is highly illustrative of a formalizing industry.
- Caution expressed for the future, given the economic climate.
- Measurement and servicing still two areas of concern and need of industry-wide attention.

18th ANNUAL

CSLS

Canadian sponsorship landscape study

Questions or Comments?

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