

ESA

European
sponsorship
association

Founded 1990

EU Conference on Sport Statistics

Existing Research Undertaken by Sports sponsorship Agencies

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March 23rd 2011

ESA's Aims

- **Setting Standards** – Identifying and promoting responsible best practice and self-regulation.
- **Improving** - Advancing sponsorship competencies, practice and knowledge.
- **Promoting** - Being an advocate for sponsorship and promoting its importance, values and ethics.
- **Supporting** - Being an essential resource for sponsorship information, education/training and relationships.
- **Engaging** – Acting as the advocate, manager and authority on key policy issues at national government and pan-European level.
- **Benefiting** – Encouraging the role of sponsorship to make a contribution to society



•ESA currently has 236 members across Europe and close links to national sponsorship associations in:

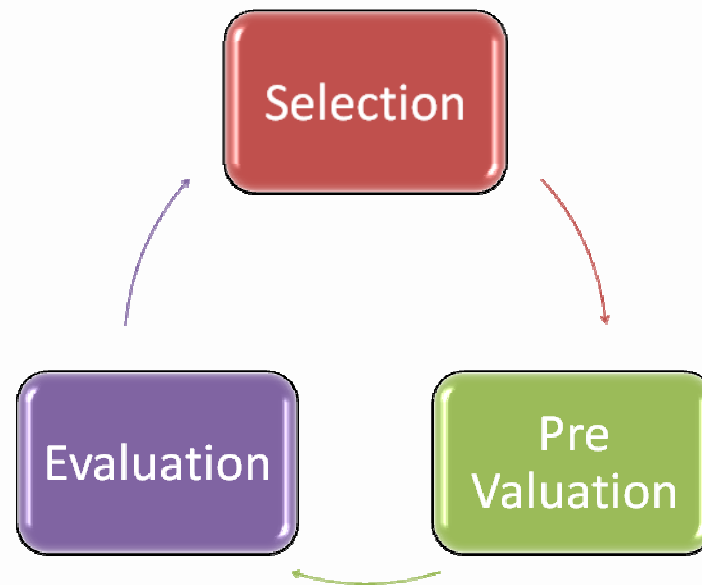
- Austria, Denmark, France, Germany, Netherlands, Norway, Sweden

•Membership open to all practitioners within the industry:

- Sponsors
- Agencies
- Legal Firms
- Venues
- Research Companies
- Rights Holders
- Independent Advisors
- Accountants
- Hospitality Companies
- Exhibition/Signage Companies

•Sports & Non-Sports Sponsorship

Sports Statistics Needed for the Sponsorship Industry



Types of Sports Statistics Required & Collected

Participation

- Who and How Many
- Essential for Grass Roots
- Growing in Importance – Corporate Social Responsibility

Following

- Attendance at Events
- Media – Audiences & Programming
 - Traditional – TV, Print, Radio
 - Digital – On-line, Mobile, Social Networks

Profiles

- Demographics - Basic
- Psychographics – Growing in Importance
- Matched to Sponsor Target Segments
- Media Usage
- Product Ownership

Experience

- Events and Campaigns
- Satisfaction
- Sign Up
- Economic Return

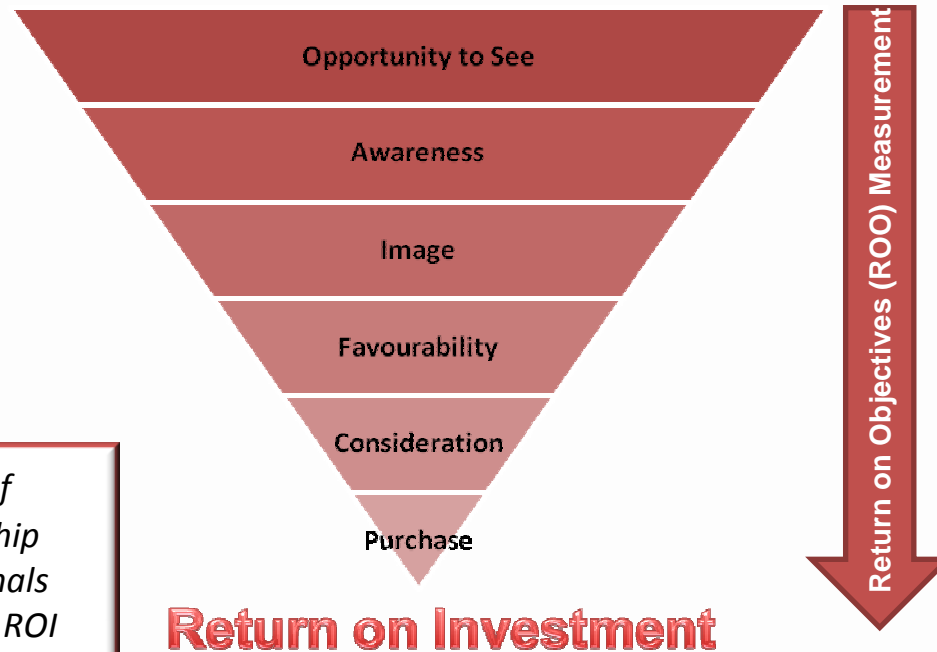
Properties

- Past, Present & Future Sponsorship Rights
- Owner, Sponsor, Payment, Term, Scope

**Use of
Data**

Use of Sports & Sponsorship Data

Used to Maximise Sponsorship Return



*"42% of sponsorship professionals predicting ROI would increase in importance in 2011" **

*IFM Sports Marketing Surveys End of Year 2010 Global Industry Survey
Sample 450 sponsorship professionals

**Sources of
Data**

Sports Statistics & Research Sources for the Sponsorship Industry



*“92% of sponsorship organisations evaluate sponsorship using a combination of internal and external resources” **

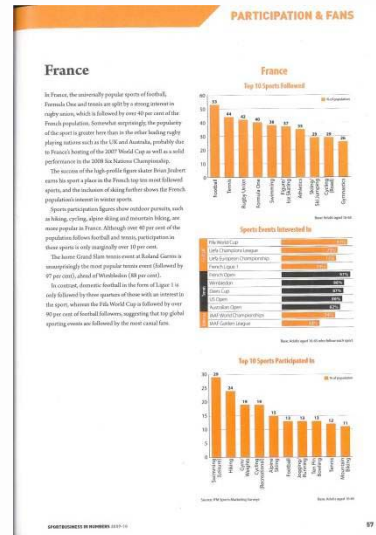
*IFM Sports Marketing Surveys End of Year 2010 Global Industry Survey
Sample 450 sponsorship professionals

Examples of
 Sports Data

Sports Participation & Following



SPORT ↔ MARKT
 SPONSORING21+



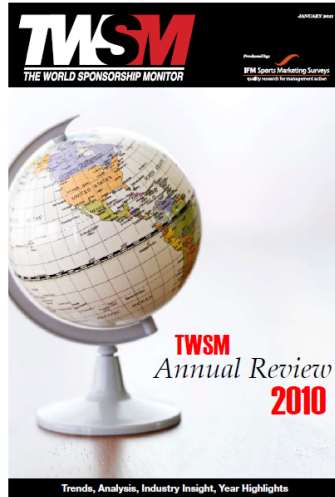
The Active People Survey is the largest ever survey of sport and active recreation to be undertaken in Europe.



Attribute	GLOBAL (2014, n=21,301)	Athletics (n=4,432)	Basketball (n=4,713)	Tennis (n=4,301)
Product interest	Yes 44%	111	108	107
Products intend to purchase (next 12 months)	Yes 42%	110	114	114
Check card	Yes 19%	108	111	103
Age	18-29 years 30%	94	92	108
30-49 years 42%	98	98	98	
50-69 years 14%	113	92	91	
Mean Value 38.7	100	100	97	
Gender	Female 48%	94	94	96
Male 52%	108	108	104	
Chief income earner	Yes 43%	112	101	108
No 57%	100	100	100	
Net household income	Low 19%	91	91	91
Medium 30%	108	108	108	
High 49%	114	114	114	
No answer / Don't know 18%	92	92	92	



**Examples of
 Sponsorship
 Data**



Sponsorship Deals

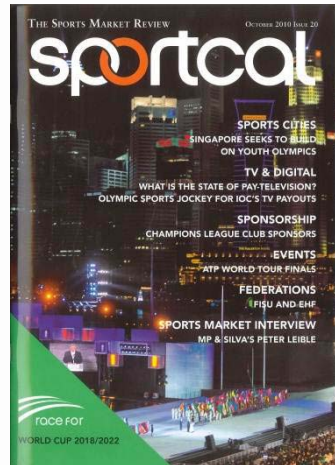
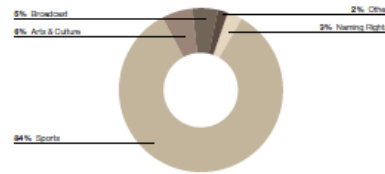
TWSM Annual Review 2010

1.2 Sport Takes the Lion's Share of Sponsorship in Number of Deals and Spend

Of all the 1,905 sponsorships reported worldwide and appearing in TWSM during 2010, sport sponsorships accounted for 84 per cent. This is startlingly consistent with the long term trends and indeed 2006 and 2007 totals were also both exactly 84 per cent. As in previous years, the shares taken by other categories of sponsorship, such as Arts & Culture and Broadcast Sponsorship are relatively low. These categories however do not get the level of reporting as deals made in the sports world so may be somewhat underrepresented in the TWSM sample of world sponsorships.

Share of Reported Sponsorship Deals by Category 2010

% of number of reported deals



Global Sports Sponsorship

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20 YEARS OF SPORT (20YS) CLIFFORD CHANCE, LONDON 11 MAY 2011

28 Years of Sport Pöll

Who Was the Most Influential?

Featured Property

- ICC Cricket World Cup 2011
- Roland Garros - French Open 2011
- Samsung Diamond League 2011
- International Archery Federation
- PGA of America
- Deutsche Eishockey Liga
- FIA Formula 1 World Championship

SPORT ↔ MARKET

SPONSOR ↔ GLOBE



Sports & Sponsorship Intelligence

Examples of Intelligence

Hospitality and Leisure Sector



Back on track?

The outlook for the global sports market to 2013

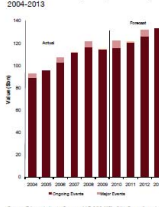


Staging a second-half comeback

The global sports market is achieving a gradual but robust recovery from the impact of the economic slowdown of 2008-2009. Over our four year forecast period from 2010 to 2013, we estimate that total worldwide revenues will record modest overall growth as the industry rebounds from the decline suffered in 2009. Boosted by surges in spending in the FIFA World Cup and Olympic years of 2010 and 2012 respectively, total global sports spending will rise from US\$114 billion in 2009 to US\$133 billion in 2013, representing compound annual growth of 3.8 percent over the four years.

The economy holds sway
 As these figures suggest, economic conditions will remain the main driver for spending on ongoing events, outsize gate revenues, sponsorships and merchandising in the near term while tailing a rebound from 2010 onwards as economic conditions improve. Long term contracts will to some degree insulate media rights from the recession, and as a result media is the only category where spending for ongoing events increased in 2009. However, weak conditions in the advertising market have been limiting renewal increases since then.

Chart 1: Value of the global sports industry 2004-2013



The recovery begins

Within this overall global growth, the relative performance of the various regions is illustrated on page 7. The overall picture is one of continued modest growth in both the larger and more mature markets of North America (US and Canada) and EMEA, as well as the smaller markets of Asia Pacific and Latin America.

North American revenues will expand at 3.0 percent compounded annually to remain the largest market by a wide margin in 2013, ahead of EMEA, growing at a CAGR of 4.3 percent. Latin America and Asia Pacific will see compound annual growth of 4.3 percent and 3.8 percent respectively over the four years.

Future challenges

The ongoing globalization of the sports market, combined with changes in distribution platforms and evolving commercial and economic factors, means each component of the market faces a number of challenges during the period up to 2013.

Globally, sponsorship is the second biggest component of the sports market after gate revenues, and will be the fastest growing component through to 2013. Since 2008, the economic downturn has focused a rising proportion of attention and spending on the biggest sports brands with global reach and pulling-power. While these have continued to attract massive sponsorship deals and strong revenues, the mid-level brands have found it harder to attract major sponsors, while sponsorship of the smaller local sports brands has been hit by potential backers reducing discretionary spend in the economic downturn. Alongside this shift, sponsors are also demanding more clarity and specific measurement of the value they get in return for their investment, and the bigger sports brands are generally more able to provide this.

IFM Sports Marketing Surveys
 quality research for management action

2010 Industry Survey

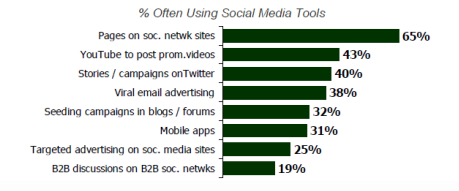
Insight review

New Decade, New Media

With accessibility to computers and mobile technology becoming commonplace, it is critical for brands to use digital media to reach their customers in 2011.

- 82% believed that social media is crucial to CSR campaigns.
- 73% cited social media as a must for all sponsorship campaigns.
- 59% believed that social media can raise the profile and interest in events more than other communication methods.
- 55% agreed that the use of social media within sponsorship has reduced the reliance on other more traditional forms of advertising.
- 65% already have pages on social networking sites such as Facebook.
- 43% often use YouTube to post promotional videos.

With facts like these, it is hard to deny the importance of social media as a communication platform and its growing importance as we move into 2011.



THE MAJOR SPORTS EVENTS GUIDE 2009

SPORTS.COM
 the sports market online

IFM Inside TENNIS

2011 World Tour
 2011 Grand Slam
 2011 World Team Cup

The Business of European Club Football

Revenue Breakdown: 40% TV Rights, 30% Sponsorship, 20% Matchday, 10% Commercial.

CSLS
 Canadian Sponsorship Landscape Study

Repucom Sponsorship Australasia
 Sponsorship Outlook Report 2010

SPONSORSHIP
 BUSINESS
 THE INDUSTRY - YOUR VOICE

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